



Pennine Education Ltd

End of Year Procedures Schools

Promotion to the Academic Year 2023\2024

Guidance Notes for Primary \ Special Schools



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schools
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Accredited Support

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Document Author:	Carolyne Hampshire	Valid From:	21/04/2024

Contact:	Pennine Education	e-Mail: champshire@pennineeducation.co.uk
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WARNING: You MUST complete the creation of the Academic Year and Pupil Promotion Routines BEFORE your current year ends e.g. 01/09/2024

PLEASE ENSURE THAT YOU USE ALL DATES ETC. DISPLAYED IN THE TEXT, RATHER THAN THOSE THAT MAY APPEAR ON SOME OF THE PICTURES.

It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupils are placed in the new academic year. We therefore recommend you start these processes as early as possible, allowing sufficient time to complete by the start of the new Academic Year.

IF YOU WOULD LIKE ANY HELP WITH ANY ASPECT OF THE END OF YEAR PROCEDURES, PLEASE DO NOT HESITATE TO LOG A CALL WITH THE PENNINE EDUCATION SERVICE DESK

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01 | Setting Up the New Academic Year

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Overview

This document describes the steps that should be followed to enable a successful transition from one academic year to another. It includes the creation of a new academic year, setting up next year’s registration groups and year groups, etc. together with the promotion of pupil from one year into the next.

WARNING: You must complete these procedures before the start of the new academic year. It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupil are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.

Setting Permissions

The permissions required to carry out the various end of year processes vary. However, users who are members of the School Administrator and Admissions Officer user groups in System Manager can carry out all the functions in this document. Please consult your System Administrator if you are unsure whether you have the required permissions.

End of Year Procedure Check List

This section provides a check list of all the actions that form part of the end of year process.

Complete	Description/Task
<input type="checkbox"/>	Record changes to teaching staff in Personnel
<input type="checkbox"/>	Create the new academic year
<input type="checkbox"/>	Set up the pastoral structure for the new academic year
<input type="checkbox"/>	Add intake and admission groups
<input type="checkbox"/>	Import Admissions and Transfer Files
<input type="checkbox"/>	Import Common Transfer Files
<input type="checkbox"/>	Check dates for part-time pupil
<input type="checkbox"/>	Record leavers
<input type="checkbox"/>	Export Common Transfer Files
<input type="checkbox"/>	Set up the promotion mapping for the new academic year
<input type="checkbox"/>	Change the status of applications
<input type="checkbox"/>	Allocate applicants to registration group/classes
<input type="checkbox"/>	Print class/registration group lists for the new academic year
<input type="checkbox"/>	Print OMR registration sheets for the first week of term
<input type="checkbox"/>	Enter reasons for absence last year
<input type="checkbox"/>	Map meal charges

Routines for After the New Academic Year has Started

Complete	Description/Task
<input type="checkbox"/>	Admit applicants
<input type="checkbox"/>	Re-admit pupils
<input type="checkbox"/>	Print the official register for July
<input type="checkbox"/>	Add 'Not Required' codes
<input type="checkbox"/>	Run housekeeping routines

Recording Changes to Teaching Staff in Personnel

This section applies only to schools using Personnel, i.e. you are recording all staff details, including contracts, training events and absences in SIMS.

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

Adding New Teachers to Personnel

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser. Click the **New** button to display the **Add Employee** page.

2. Enter the **Surname**, **Forename**, and then select their **Gender** from the drop-down list.
3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.



Calendar button

4. Click the **Continue** button. SIMS checks to see if the member of staff already exists. If no entry exists, the **Employee Details** page is populated with the data just entered.

- Click the **Employment Details** tab to display the **Employment Details** panel.

Employee Details : Adrian Blacker

Save Undo Print Suspense Links

1 Employment Details

1 Employment Details

Teaching Staff Teacher Number 60/55916

Teacher Category Qualified Teacher Qualified Teacher Status Grad Teacher Program (trained in EI)

Staff Code AB Employee/Payroll No.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
01/09/1987		01/09/1982	01/09/1985	Brookside Comm...	

Check

Check	Clearance Date	Clearance Level
DBS Check	03/09/2013	Enhanced Clearance
Health Check	12/12/2004	Satisfactory
List 99	03/06/2002	List 99 Cleared

Contract

Status	Start Date	Post	Service Term	Scale Point
	01/09/2000	Headteacher	Leadership	27

Service Agreement

Start Date	End Date	Agreement Hours/Week

- Select the **Teaching Staff** check box for all teaching staff. This activates the **Teacher Category** drop-down list.

NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in all applicable returns.

- Select the required **Teacher Category** (e.g. **Qualified Teachers**) from the drop-down list.
- Enter a **Teacher Number** if required. This must be in the format NN/NNNNN, where N represents a number, e.g. **60/55916**.
- Select the required **Qualified Teacher Status** from the drop-down list.
- Enter a unique **Staff Code** (up to three characters), if required.
- Enter the **Employee/Payroll No.**, if known.
- In the **Employment Dates** panel, create or edit a record and record the continuous service start date (**Cont Service Start**), local authority start date (**LA Start**) and **Employment Start** date, or click the respective **Calendar** buttons and select the required dates.

13. Enter the name of the **Previous Employer**, if known.
14. Add a record for a **DBS Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received (**Clearance Date**) or click the **Calendar** button to select the required date.
15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
16. Record any additional checks, if required.
17. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.

Completed

Creating the New Academic Year

PLEASE ENSURE THAT YOU HAVE A SUCCESSFUL BACK UP OF YOUR SIMS\FMS DATA BEFORE STARTING THIS PROCESS

This process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each pupil/student on the dates entered.

IMPORTANT NOTES:

Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created can result in error messages.

Please be aware that the process may take a long time because the system creates attendance records for the new academic year.

When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupil arrive in school; it could be an INSET day, for example. An end date is calculated for 365 days later.

For example, if the academic year starts on 03/09/2024 then an end date of 02/09/2024 is automatically supplied.

The first day of term should be specified even if pupil are not in attendance.

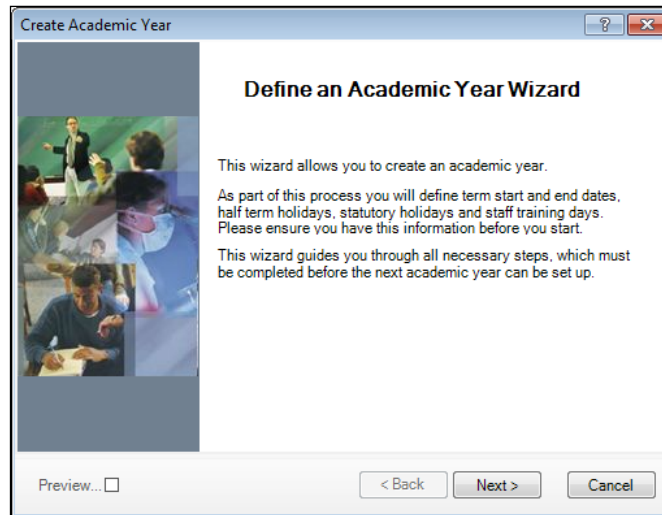
Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

Promotion into New Year groups, etc. occurs automatically on the first day of the first term of the new academic year, providing that the promotion process has been carried out.

Before proceeding, please check that you have carried out the following:

- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensure that you have the new academic year term dates, training days, etc. to hand.

1. Select **Routines | School | Academic Year** to display the **Create Academic Year** wizard.



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week

Day of the week	AM Session	PM Session
Monday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>

The **First day of the school week** drop-down list is read-only and displays the first day of your school week, as specified when your system was first set up.

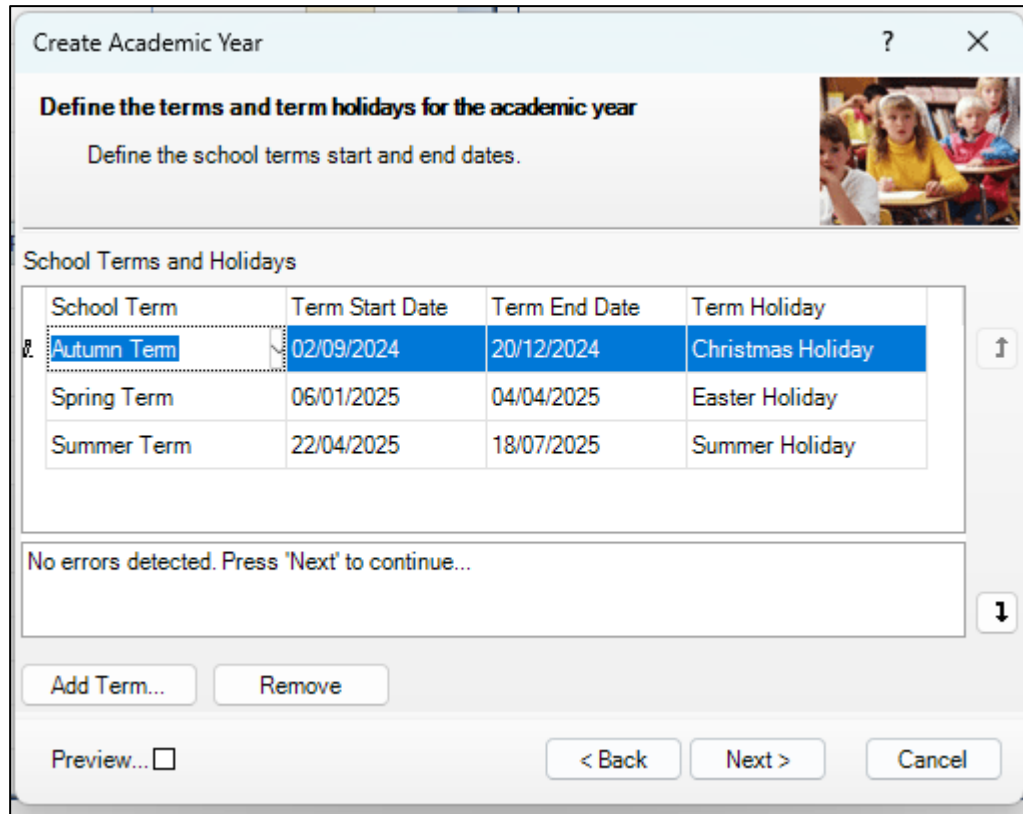
1. Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

IMPORTANT NOTE: PLEASE ENSURE THAT ALL TICKS ARE IN PLACE FOR MONDAY-FRIDAY AM AND PM SESSIONS OTHERWISE THE DESELECTED DAYS WILL NOT APPEAR IN ATTENDANCE. THIS SCREEN IS NOT EDITABLE AFTER THE ACADEMIC YEAR IS CREATED

2. Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

When entering term dates, the start date should always be the date the term starts, even if pupil are not in school on those days.



Create Academic Year ? X

Define the terms and term holidays for the academic year

Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	02/09/2024	20/12/2024	Christmas Holiday
Spring Term	06/01/2025	04/04/2025	Easter Holiday
Summer Term	22/04/2025	18/07/2025	Summer Holiday

No errors detected. Press 'Next' to continue...

Add Term... Remove

Preview...

< Back Next > Cancel

1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format, or by selecting from the calendar.

NOTE: Please refer to the guidance issued from your LA as to preferred start days for the Academic Year. If you are unsure, please log a call with the Pennine Education Helpdesk

Alternatively, click in the date cell until a down arrow appears then click the arrow to display a calendar, from which the required date can be selected.

The screenshot shows the 'Create Academic Year' wizard. The main heading is 'Define the terms and term holidays for the academic year' with the instruction 'Define the school terms start and end dates.' Below this is a table titled 'School Terms and Holidays'.

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	02/09/2024	20/12/2024	Christmas Holiday
Spring Term		25	Easter Holiday
Summer Term		25	Summer Holiday

A calendar is open over the 'Term Start Date' cell, showing the month of September 2024. The calendar includes a header with 'September' and '2024', a grid of days from 1 to 30, and buttons for 'Today' and 'Clear'. Below the table, there is a status message 'No errors detected. Press' and a 'Preview...' checkbox. At the bottom are navigation buttons: '< Back', 'Next >', and 'Cancel'.

NOTE: You can overwrite the name of the term in the **School Term** column if a different name is required.

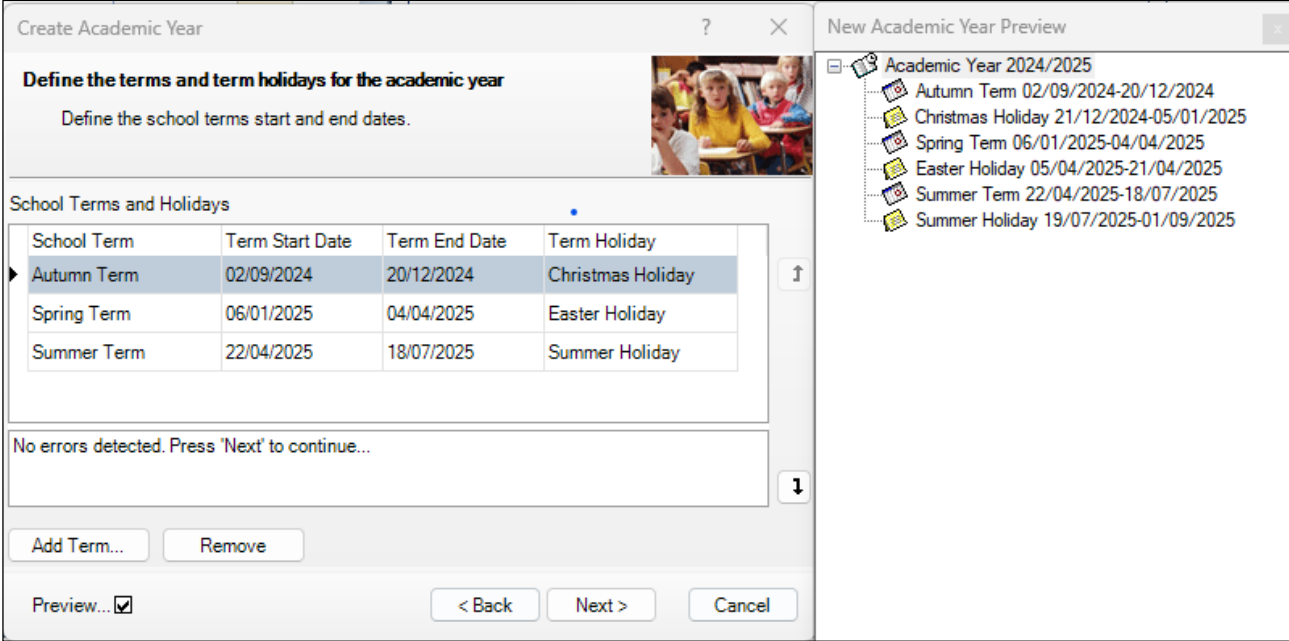
- Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually enter a new holiday name. Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

- If you are happy with the default three school terms, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays*.

NOTE: If the **Next** button appears greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.

- From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on

the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview panel.



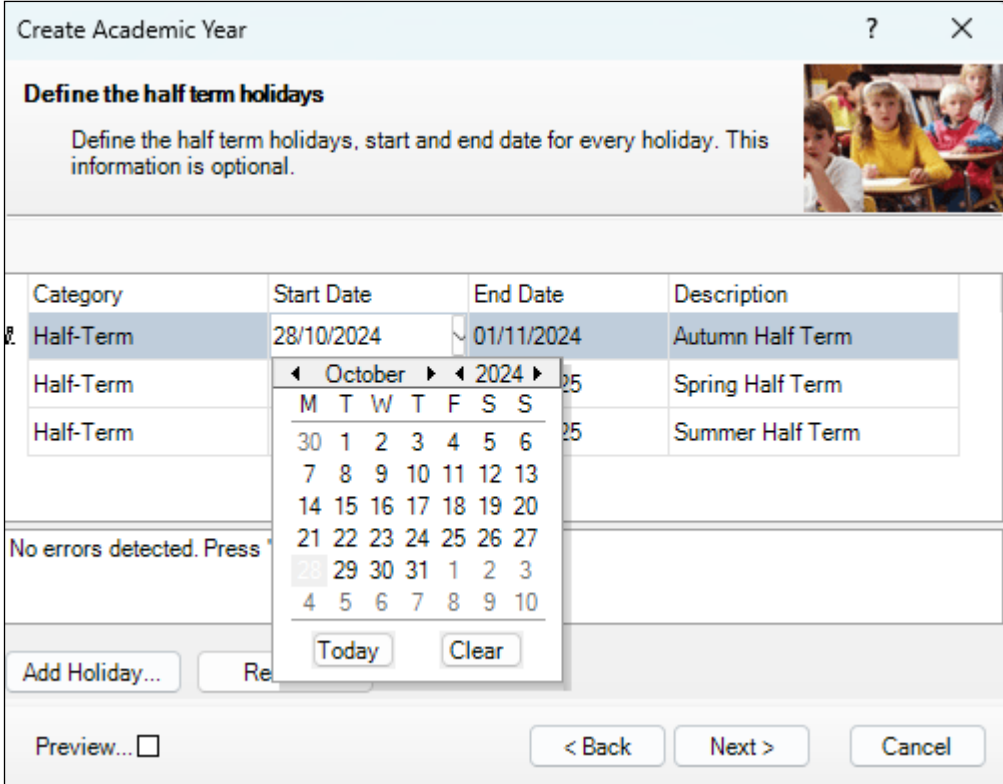
Defining Half Term Holidays

Holidays are created automatically for the dates in between the term dates entered. For example, if the Spring term ends on 01/04/2024 and the Summer term starts on the 19/04/2024, then it is assumed that the dates in between are holidays. In addition, you need to enter the dates for half-term holidays manually.

1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.

2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.
5. Click the **OK** button to add the half-term holiday.

- 6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.



- 7. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

The **Define teacher training days** page is used to enter any training days where pupils will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).

1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.

2. Select **Staff Training Day** from the **Category** drop-down list. If the required category name does not exist, enter the name manually.
3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
4. Enter a relevant **Description** if required, e.g. INSET 1, to ensure that the type of training can be identified. The description appears in the School Diary.

- 5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.

Create Academic Year [?] [X]

Define teacher training days

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
Staff Training Day	02/09/2024	Staff Training Day
Staff Training Day	03/09/2024	Staff Training Day
Staff Training Day	06/01/2025	Staff Training Day

No errors detected. Press 'Next' to continue...

Preview...

- 6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

In addition to other dates during term time, you will also need to specify any public holidays, such as Bank Holidays, that occur during term time.

1. From the **Define public holidays** page, click the **Add holiday** button to display the **New Public Holiday** dialog.


2. Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
3. Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
4. Enter a relevant **Description**, such as Easter Monday. This description appears in the School Diary.

- Click the **OK** button to add the public holiday. Repeat this process for all public holidays throughout the academic year.

Create Academic Year
? ×

Define public holidays

This information is optional at this stage and can be defined later via the School Diary.



Category	Date	Description
Bank Holiday	01/01/2025	January Bank Holiday
Bank Holiday	05/05/2025	May Day

No errors detected. Press 'Next' to continue...

Add holiday
Remove

Preview...
< Back
Next >
Cancel

- Click the **Next** button to display the **Ready to create new academic year** page.

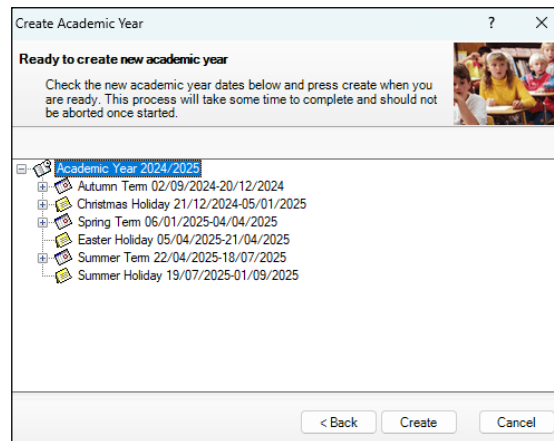
Creating the New Academic Year

It is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

Please be aware that this process may take a long time because the system creates attendance records for each pupil in the new academic year.

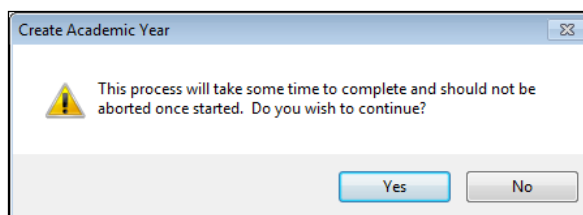
WARNING: IT IS VITAL THAT THIS PROCESS IS NOT INTERRUPTED ONCE STARTED

1. A summary of the data entered is displayed on the **Ready to create new academic year** page. The detail for each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable + icon. You are strongly advised to check this information carefully for any errors or inaccuracies.



Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

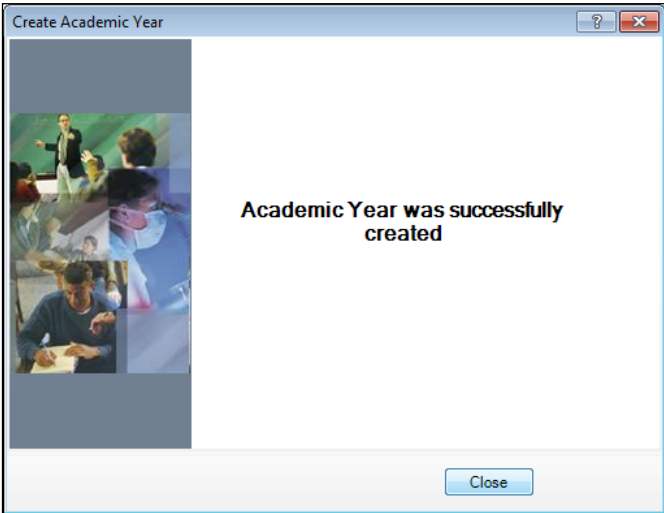
The following warning message is displayed:



Progress is displayed via a progress indicator at the bottom of the wizard.

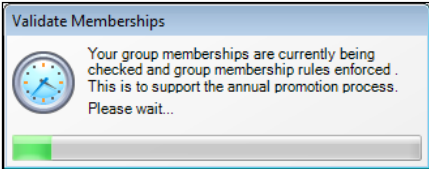


Once complete, the final page of the wizard is displayed:

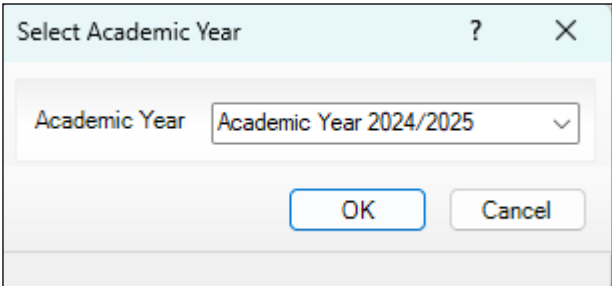


Click the **Close** button to close the wizard and complete the process.

It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools | Validate Memberships**, which displays the following page.



- 2. Once the Academic Year has been completed select **Routines | School | Edit Academic Year**. You will be presented with the following screen



3. Click on OK. Click on NEXT.

Day of the week	AM Session	PM Session
Monday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>

4. Ensure that Monday to Friday, AM and PM all have ticks against them. If they do, click on Cancel and continue to the next section. If they DO NOT Log a call immediately with the Pennine Education Service Desk. If everything thing is correct click on cancel to return to the SIMS Homepage.

Completed

Setting up the New Academic Year's Pastoral Structure

The new academic year's pastoral structure is set up automatically when the new academic year is created and is based on the current academic year's structure. Therefore, you must ensure that a new academic year has been created before proceeding with the instructions in this section.

There may be occasions when the pastoral structure of the new academic year needs to be different from the current structure. For example, you may wish to:

- add additional registration group/classes, where pupil/student numbers have increased.
- merge registration group/classes, where pupil/student numbers have decreased.
- add a new year group, e.g. where a Nursery has been introduced in your school.
- change class names.

NOTE: It is not essential to assign teachers to registration group/classes at this stage. This can be done when the information is known, but must be done before the start of the academic year so that Attendance records are not affected.

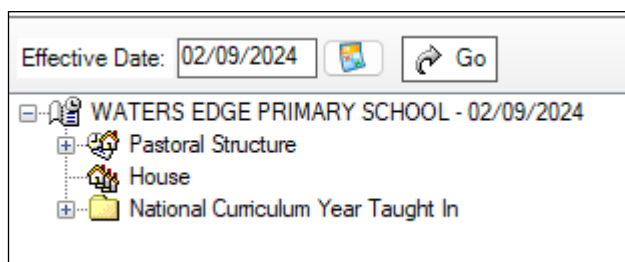
If you want teachers to be promoted with their pupil in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year on page 50).

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups on page 34).

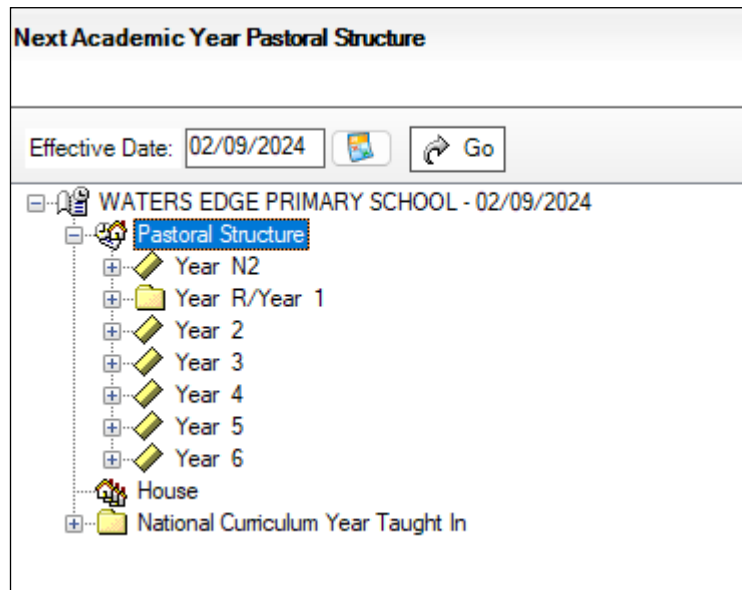
Opening the Structure of the New Academic Year

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

IMPORTANT NOTE: To ensure that changes are being made for the next academic year rather than the current academic year, ensure that the start date of the next academic year is displayed in the **Effective Date** field.



- The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

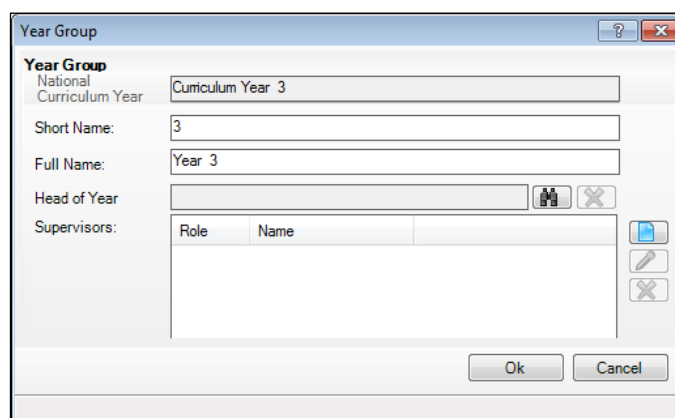


IMPORTANT NOTE: If you change the **Effective Date**, you must click the **Go** button to refresh the display.

- The full structure can be viewed by clicking the + or - icons to expand or contract the display.

Checking National Curriculum Years

Please ensure that the National Curriculum year associated with each year group is correct. This can be achieved by right-clicking each year group and selecting **Properties** from the pop-up menu to display the **Year Group** dialog. The **National Curriculum Year** associated with the year group is displayed.



 **Completed**

Adding New Year Groups

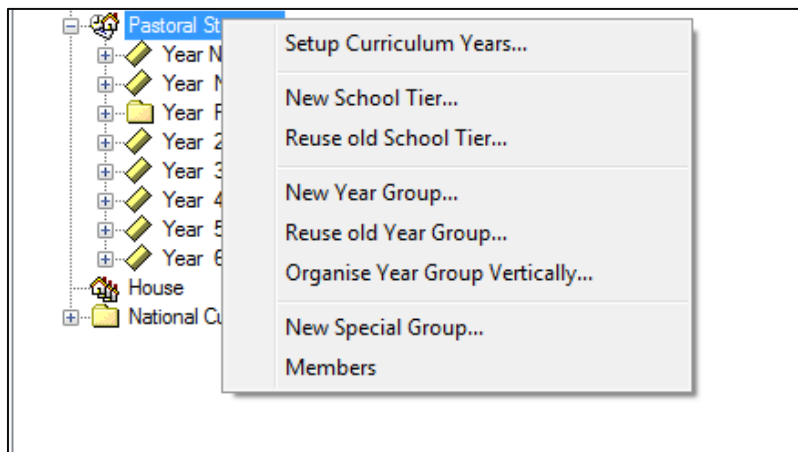
NOTE: If you do not need to add additional Year Groups, please proceed to Adding Classes, Page 24

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection.

NOTE: Schools that have a Nursery and admit pupil into the Nursery later on in the academic year, e.g. in January, will benefit from creating either an N1 or N2 year at this point. This enables pupil to be assigned to the appropriate National Curriculum year when they join the school. This ensures the accuracy of a School Census return.

1. Select next year's pastoral structure.

NOTE: If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year. This is achieved by right clicking the **Pastoral Structure** item in the navigation tree, selecting **Setup Curriculum Years** then selecting the required curriculum year check box.



Errors are displayed at the bottom of the screen until years and classes have been added (as shown in the following graphic).

Error
National Curriculum Year "Curriculum Year N1" does not have any Year Group attached

NOTE: Once a National Curriculum year has been created, it cannot be deleted. Therefore, please ensure that the correct NC year is added.

- Right-click the **Pastoral Structure** item in the structure and select **New Year Group** from the pop-up menu to display the **Year Group** dialog.

- Select the **National Curriculum Year** with which the year group will be associated, from the drop-down list.
- Enter a **Short Name** and a **Full Name** for the year group.

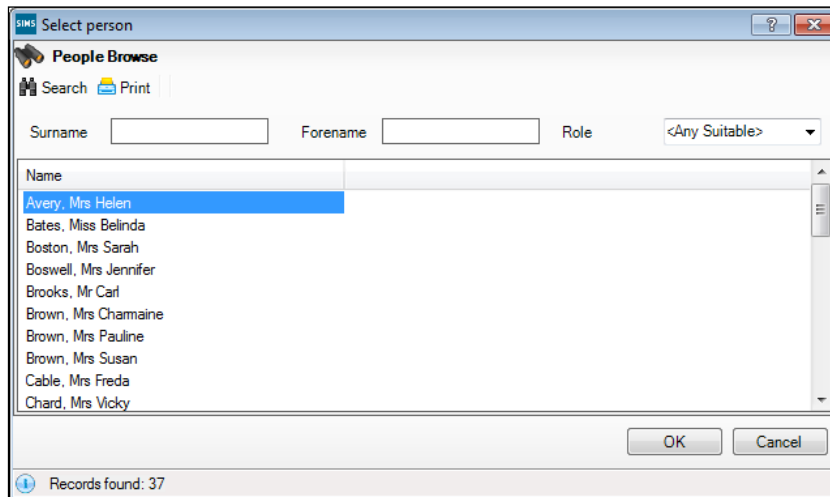
The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. **Year 2**). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. **Y2**). Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

- Select the **Head of Year** if required, by clicking the **Browser** button to display the **Select person** dialog. This is optional (as many Primary schools do not have Heads of Year) and/or can be done at a later date if preferred. If you do not intend to add a Head of Year, please proceed to step 8.



Browser button

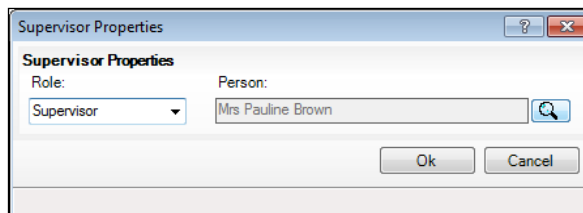
- Enter a **Surname** and/or **Forename** then click the **Search** button. Alternatively, leave the fields blank to search for all staff.



Highlight the required person and click the **OK** button to select them as the Head of Year and return to the **Year Group** dialog.

- Select a **Supervisor** for the year group (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and/or can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 8.

 *New button*



- Select the **Role** from the drop-down list then click the **Browser** button adjacent to display the **Select person** dialog.

NOTE: By default, the **Role** drop-down list displays **Supervisor** and **Pastoral Manager**.

- Search for, and select, the required supervisor in the same way as the Head of Year. Click the **Ok** button on the **Supervisor Properties** dialog to set the selected person as the supervisor and return to the **Year Group** dialog.
- Click the **Ok** button on the **Year Group** dialog to add the year group. You must now add applicable classes, as described in the next section.

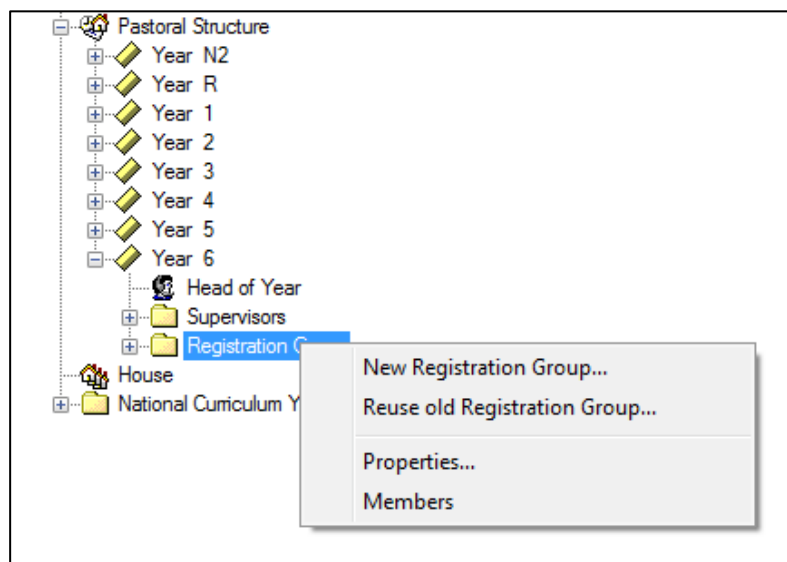


Adding Classes

You are strongly advised to check whether the name you intend to use for a new class has not previously been used. This is achieved by expanding the **Pastoral Structure** and appropriate year group then right-clicking the **Registration Group** folder and selecting **Reuse Old Registration Groups** from the pop-up menu to display the **Reuse old Registration Group** dialog. This dialog lists any classes that have previously been deleted.

If the required name is listed, highlight it and click the **OK** button to re-use the class rather than create a new class with the same name. If the required name is not listed, click the **Cancel** button then create a new class as follows.

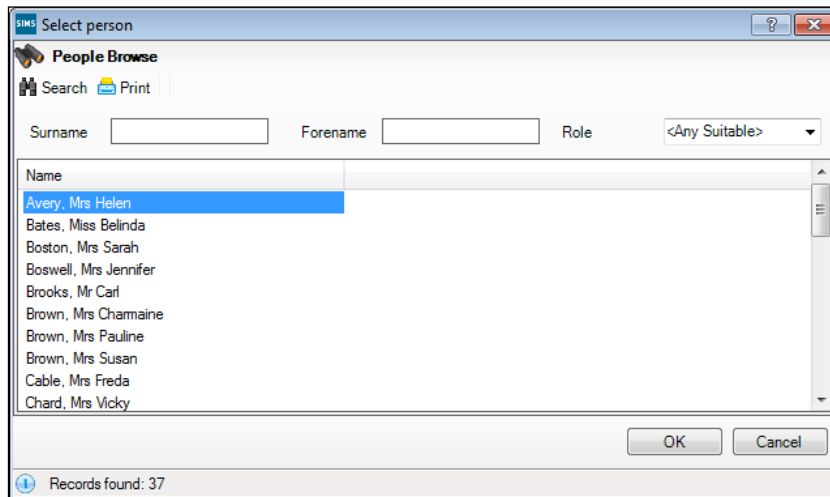
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 21).
2. Expand the year group to which you wish to add the class by clicking the adjacent + icon.
3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.



4. Enter a **Short Name** and **Full Name** for the new class.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. Rowan. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

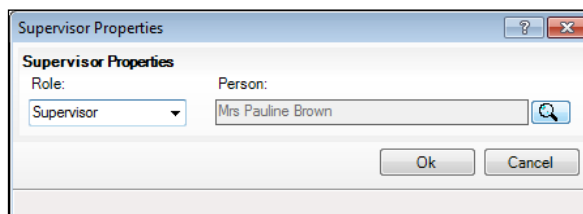
5. Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.



6. Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.
7. Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog.
8. Select a **Supervisor** for the class (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 9.



New button

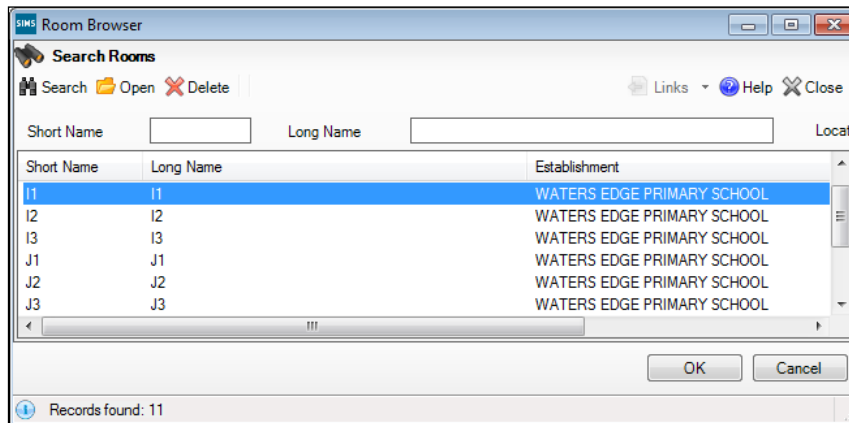


- Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to open the **Select Person** browser. Select the required person in the same way as for the Registration Tutor.

NOTE: By default, the **Role** drop-down list displays **Supervisor, Pastoral Manager** or **Joint Main Supervisor**.

- Click the **Ok** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the class return to the **Class** dialog.

9. Select the **Room** that will be used by this class (if required) by clicking the **Browser** button to display the **Room Browser** dialog.



- Enter either the **Short Name** or the **Long Name** of the room then click the **Search** button. Alternatively, leave all of the fields blank to search for all rooms.
- Highlight the required room then click the **OK** button to return to the **Class** dialog.

10. Click the **OK** button to create the class.



Important Note on Editing Class Names

There may be occasions when you wish to rename classes in either the current or next year's pastoral structure. This is sometimes required by schools that name their classes based on teacher's initials and the teacher then leaves the school.

It is essential that you do not just rename the class. This is because the class name is recorded in the class history. If you change the name, the change is made throughout the history of that class, so the class is recorded as **always** having been named according to the name change.

NOTE: To ensure that you do not rename a class to a name that already exists, right-click the required **Registration Group** folder in the pastoral structure and select **Reuse Old Registration Groups**. Any classes that have previously been deleted are displayed. If the required name is listed, highlight it then click the **OK** button to re-use it rather than create a new class with the same name. If the required name is not listed, create a new class.

Please see the following two examples:

Example 1:

A class is currently called **4AB** after a teacher named Anita Brown. At the end of the current academic year, Anita will move up with her class, which becomes **5AB**.

If you rename **4AB** to **5AB** then all the pupil in **4AB** will be recorded as always having been in **5AB** because the history is also amended.

In this circumstance, all you need to do is to create a new class called **5AB** in the pastoral structure for the new academic year (e.g. 2024/2024) and set the promotion mapping to promote to this class at the start of the new academic year. All pupil in **4AB** will move up to **5AB** at the start of the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page 50).

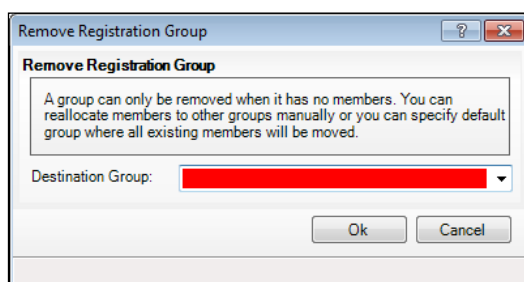
Example 2:

A class is currently called **4SL** after a teacher named Sonia Lovell. Sonia is leaving and will be replaced by Andrew White during the same academic year.

If you rename **4SL** to **4AW** then all the pupil in **4SL** will be recorded as always having been in **4AW** because the history is also amended.

To correctly change a class name:

1. Add a new class (please see *Adding Classes (Registration Groups)* on page 26) in the current pastoral structure (e.g. 2024/2024) labelled with the new class name (e.g. **4AW**).
2. Delete the old class by right-clicking the required class name and selecting **Remove** from the pop-up menu to display the **Remove Registration Group** dialog.



3. Select the newly created class (e.g. **4AW**) from the **Destination Group** drop-down list. All members from the old class will be transferred to the new class.
4. Click the **Ok** button to delete the class and transfer the pupil/student memberships.
5. Click the **Save** button to save the changes.

General Advice

The responsibility for defining the naming convention of classes lies with the school. However, you should note that if you use teacher initials, you must carry out the previous instructions each time a teacher leaves or if there are any teaching changes that result in a class name change, e.g. teachers change class or years

mid-year. In addition, you will need to create new classes based on the teacher initials for each new academic year as described in Example 1. If you wish to use teacher initials, it is far easier if you do not precede the class name with the year, e.g. use **SL** rather than **4SL**.

Primary schools may wish to use classes named after trees, colours, animals, etc. An alternative is to name classes by year and a single initial (not based on a teacher's name) such as **3A**, **3B**, etc. that remain static year on year.

Changing Year Group Horizontal/Vertical Structures

NOTE: If you **Do Not** need change your Year group Structure, please proceed to the next section **Adding Intake\Admission Groups** on page 32

There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

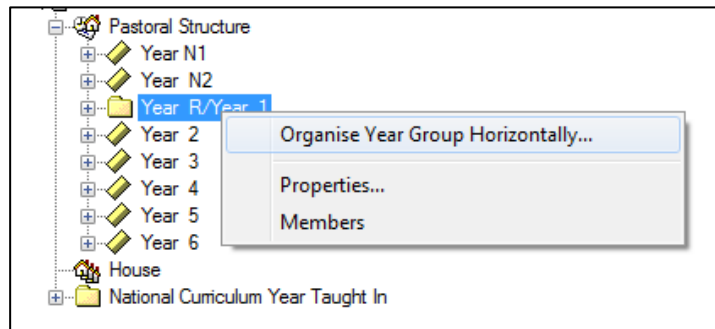
- As a consequence of falling pupil/student numbers. This may require you to change from a horizontal to a vertical structure to enable pupils from mixed year groups to be taught in the same class.
- As a consequence of increasing pupil/student numbers. This may require you to change from a vertical to a horizontal structure to enable pupils from the same year to be taught in the same class.
- As a consequence of a change in pupil/student numbers across the years, e.g. a low birth rate one year, then a high birth rate two years later. This may require you to change to a combined horizontal and vertical structure.

Changing from a Vertical to a Horizontal Structure

This process may be required if, for example, your pupil/student numbers have increased. This would enable previously merged years, such as Nursery/Reception (vertically structured) to be split into two separate years (horizontally structured) because there are now sufficient pupils from the same year group to be taught in one class.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 19).

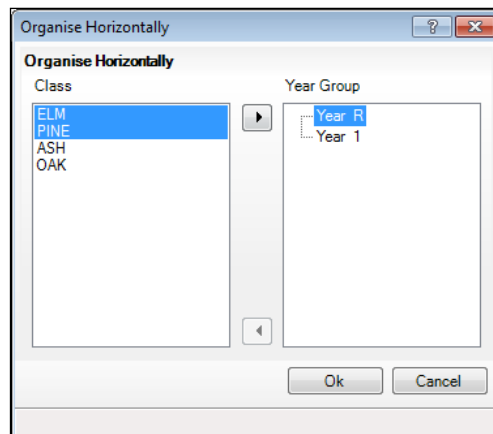
- Expand the **Pastoral Structure** heading by clicking the + icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Nursery/Reception**.



- Right-click the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** dialog.

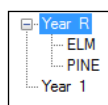
This dialog enables you to determine the class(es) that should be attached to each year.

- In the **Class** panel, highlight the class(es) you wish to attach to a year (hold down the **Ctrl** key and click the class names to highlight more than one class) then click the required year group in the **Year Group** panel.

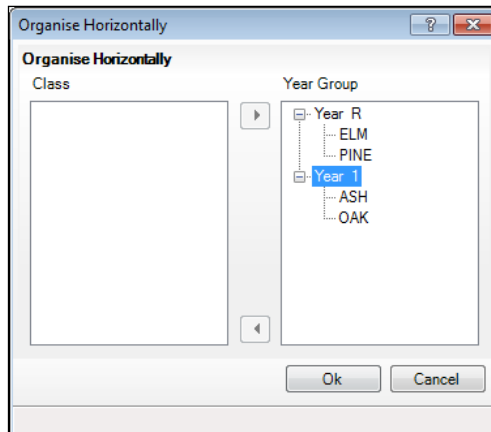


In the previous example, **ELM** and **PINE** are being attached to the Reception (**Year R**).

- Click the right arrow button in the centre of the dialog to attach the selected class(es) to Reception (**Year R**). The class(es) are moved under the **Year R** heading, as shown in the following example.



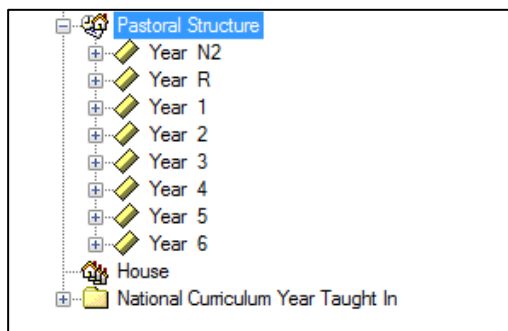
6. Repeat steps 4 and 5 for all the remaining classes in the **Class** panel.



NOTE: Each class **must** be attached to a single year group and therefore, the **Class** panel **must** be empty before you can complete the process.

7. Click the **Ok** button to save the details.

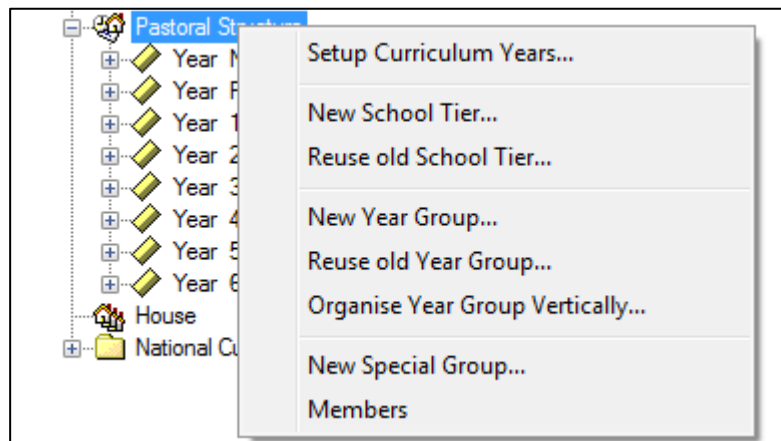
The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.



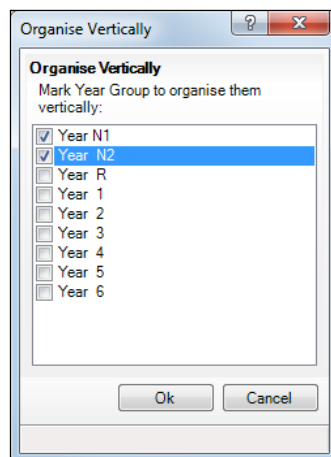
Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your pupil/student numbers have decreased. This could allow previously separate years, such as Nursery and Reception (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient pupils from the same year group to be taught in one class.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 21).

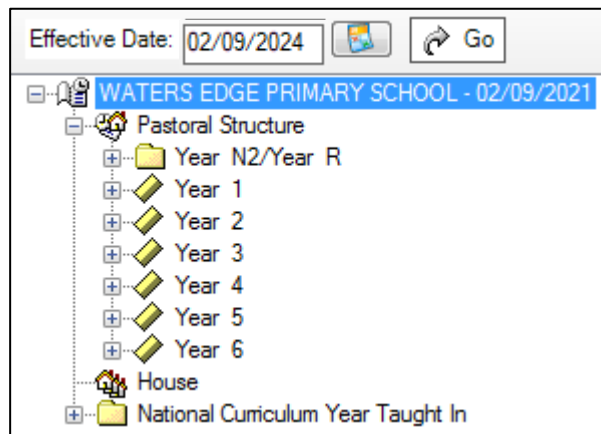


2. Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.



3. Select the check boxes adjacent to the **Year N1** and **Year N2** you wish to merge into a vertical structure then click the **Ok** button. In the previous example, Nursery 1 and Nursery 2 are being merged into a vertical structure.

- Click the **Ok** button to merge the selected years, which are then displayed in the pastoral structure separated with a /, as shown in the following example.



Saving the Amended Pastoral Structure

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.

Completed



Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of separate admission groups for those joining in Autumn, Spring and Summer terms might be set up for your Nursery.

IMPORTANT NOTE: Please ensure that the **Date of Admission** lies within the new academic year.

If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.

If you need to add a new year group but have already created intake/admission groups, you will need to create new intake/admission groups after the additional year group has been added and then move any existing members to the new intake/admission group(s).

This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2023/2024 - Autumn Year N2	2023/2024	Autumn	Year N2	20	Active
2023/2024 - Autumn Year R	2023/2024	Autumn	Year R	40	Active

2. Carry out a search to ensure that the intake group does not already exist.
3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are

1 Intake Group

Admission Year: 2024/2025
 Admission Season: [Redacted]
 Year Group: [Redacted]
 Planned Admission: [Redacted]

Name: [Redacted]
 Active:

2 Admission Group

Name: [Redacted]
 Date Of Admission: [Redacted]


highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added.

In addition, Own Admission Authority schools who have applied a Basic or Full Admissions Licence will see two additional fields (**Admission Policy** and **Numbers to Rank**).

4. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2024/2025) from the drop-down list (this defaults to the current academic year).

- Select the required **Admission Season (Autumn, Spring or Summer)** or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

1 Intake Group			
Admission Year	2024/2025	Name	2024/2025 - Autumn Year R
Admission Season	Autumn	Active	<input checked="" type="checkbox"/>
Year Group	Year R		
Planned Admission	30		

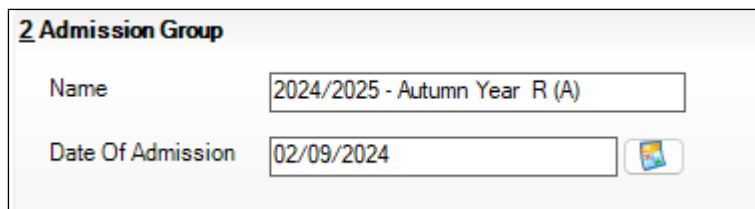
2 Admission Group	
Name	2024/2025 - Autumn Year R (A)
Date Of Admission	02/09/2024 

- Select the required **Year Group** from the drop-down list.
- Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
- Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the **Admission Policy** drop-down list. Select a policy, if required.
- Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can enter the number of applications that should be ranked in the **Numbers to Rank** field. By default, all applications in an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter the agreed number in this field.
- If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year, Admission Season** and **Year Group**, e.g. **2024/2024 – Autumn Year N1**. The default name can be amended, if required.
- The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding an Admission Group (Multiple Groups Not Enabled)

1. Clicking in the **Name** field provides a default name for the group, which can be overtyped as required.
2. Enter the **Date of Admission** for the group.
3. Click the **Save** button to create the intake and admission group.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.



2 Admission Group

Name: 2024/2025 - Autumn Year R (A)

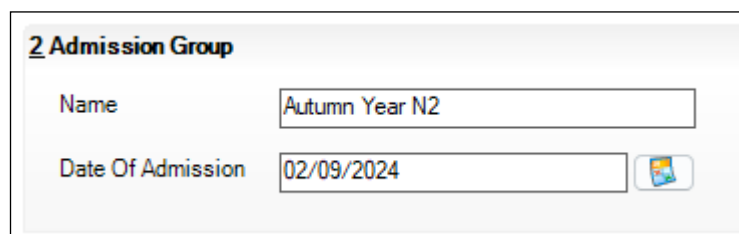
Date Of Admission: 02/09/2024

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. If you are not sure, please refer to the graphics in the previous section. If the second panel is labelled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labelled **Admission Group**, SIMS is not set up to allow multiple admission groups.

If SIMS is not set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)*.

1. From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.



2 Admission Group

Name: Autumn Year N2

Date Of Admission: 02/09/2024

2. Enter a **Name** for the admission group together with the **Date Of Admission**. Alternatively, click the **Calendar** button and select the required date.

IMPORTANT NOTE: Please ensure that the **Date Of Admission** falls within the applicable academic year.

Click the **OK** button to add the admission group and return to the **Intake Group Details** page.

3. If any further admission groups are required, click the **New** button in the **Admission Groups** panel and repeat steps 2 and 3.
4. Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.



Importing an Admissions Transfer File (ATF)

After places have been finalised, schools receive an Admissions Transfer File (ATF) from their LA. This file contains the names of applicants who have been offered a place at your school for the following September, together with additional basic applicant information. Once the ATF has been imported into SIMS and applicants have been accepted, the curriculum planning process can be started.

NOTE: Before proceeding, please ensure that you have received an ATF from the LA and that it is stored in an accessible and secure location.

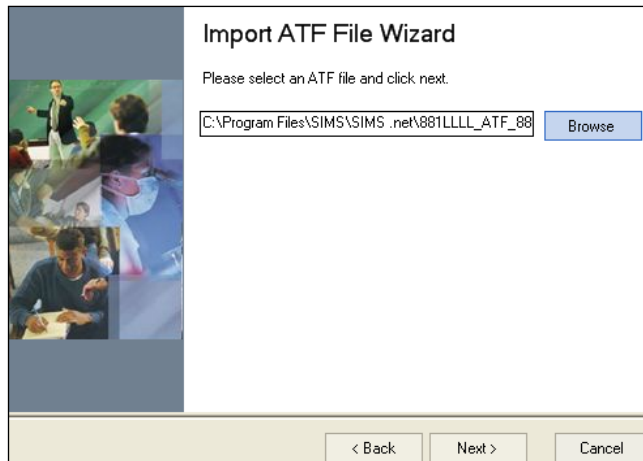
An intake group and admission group combination must also have been defined, into which applicants can be imported.

5. Select **Routines | Admission | Import ATF File** to display the **Import ATF File** wizard.



6. Click the **Next** button to continue.
7. Click the **Browse** button to display the **Open** dialog.

8. Navigate to the location of the stored ATF, highlight it then click the **Open** button.



9. Click the **Next** button to validate applicant addresses in the ATF.



The **House Number** and **House Name** of an address are held in a single field of the XML file structure. This field is called a **PAON** (Primary Addressable Object Name).

This page is displayed only if the ATF contains addresses with incorrectly formatted PAON fields and enables you to correct the address details to prevent SIMS from rejecting the address.

The **Hide Best Guess** check box is selected by default.

Addresses that can be reconciled without user intervention are not displayed. The only addresses displayed in the lower section of the page are those that cannot be resolved automatically. These addresses can be corrected by clicking either the **House Number** or **House Name** field then entering the correct information manually. Alternatively, address details can be discarded and therefore not imported by selecting the **Discard** check box adjacent to the relevant entry.

If a large number of addresses require correction during import, you should request a correctly structured ATF from the LA.

10. After correcting or discarding incorrect addresses, click the **Next** button to continue. Select the required **Intake Group** from the drop-down list.

SIMS checks that the details contained in the ATF file header correspond with the details of the intake group into which the file is being imported. All admission groups associated with this intake group are displayed in the panel at the bottom of the wizard.

11. Highlight the required **Admission Group** then click the **Next** button to import the ATF. A progress bar is displayed.

Schools that have started to enter manually the details of next year's applicants may encounter some duplicate applicants when importing the ATF. To reduce the risk of duplicate applicants, SIMS checks the information in the ATF against existing applicant details. Any details that match based on surname and forename are displayed.

NOTE: These details require investigation to determine whether they are new applicants or duplicates of existing, manually entered applications.

Application Reference Numbers (ARNs) play a key role in the matching of applications. Applicants who have been entered manually in SIMS are not issued with an ARN. ARNs are created as part of the LA process and applicants contained in the ATF have been given their own unique number, which is imported into SIMS with the rest of their details. These applicants are not displayed on this page.

- If an applicant in the ATF is a match for an existing applicant, select the **Update Application** check box. This updates the existing application and adds the applicant's ARN to their current record.
- If an applicant in the ATF is a match for an existing applicant in SIMS, where their application was originally from another admissions year or they are currently an existing pupil in the Nursery year, select the **New Application** check box. For example, an applicant applied to join the school for the Nursery year in September 2023 but their application was unsuccessful, so they have now applied to join the Reception year in September 2024. These applicants are created as new applications.

- If an applicant in the ATF is a completely new applicant and is not the same as the individual found by SIMS, select the **New person** check box to record a new person and a new application.

Title	Name	Address	Matches	Title	Name	Address	Role
Mr	Calvin Tang	47 Fair Green Lane, Ballynahinch	<input type="checkbox"/>	Mr	CALVIN TANG		Contact, Pare
			<input checked="" type="checkbox"/>		New person		
Mrs	Julie Tang	47 Fair Green Lane, Ballynahinch	<input type="checkbox"/>	Mrs	JULIE TANG		Contact, Pare
			<input checked="" type="checkbox"/>		New person		

View all the fields in the panel using the scroll bar to move backwards and forwards across the page.

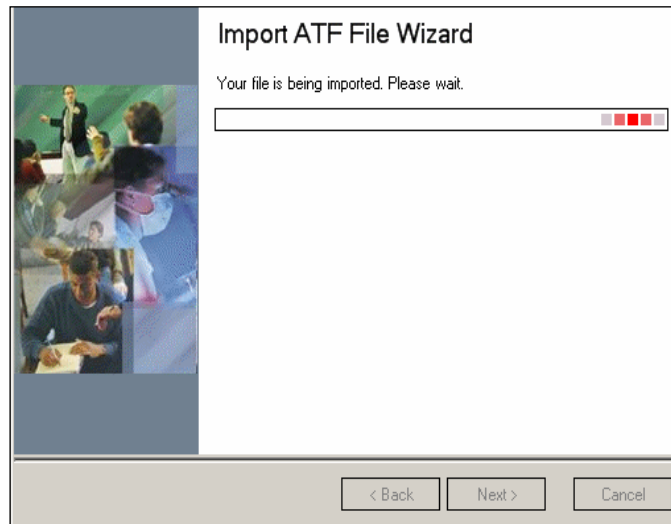
12. Click the **Next** button to continue.

SIMS also checks for **Contact** matches, e.g. any applicant in the incoming ATF who shares a contact who is already present in the system.

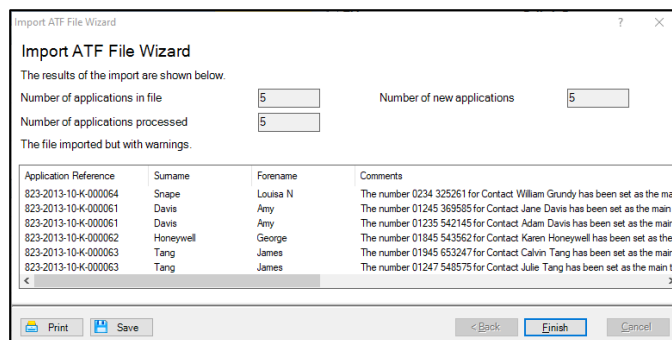
- If any of the contacts listed on the following page of the wizard prove to be a match for an existing contact, select the **Matches** check box adjacent to the correct **Name**.
- If any of the contacts listed on the following page of the wizard prove to be a new contact, select the **Matches** check box adjacent to the new person record in the **Name** column.

Name	Title	Address	Matches	Title	Name	Address
Michael Pieterso	Miss	Unknown	<input checked="" type="checkbox"/>	Mr	Michael Pieterso	
			<input type="checkbox"/>		New person	

13. Once you have dealt with each contact, click the **Next** button to continue.



When the import is complete, the **Number of applications in file**, the **Number of applications processed** and the **Number of new applications** are displayed.



Applicants are imported with a status of **Offered** and their details can be viewed and updated by clicking the **Application** icon on the toolbar or selecting **Focus | Admission | Application**. Warnings or errors in the ATF import are listed, as shown in the previous graphic.

It is possible to **Save** or **Print** these details by clicking the appropriate button on the right-hand side of the page.

IMPORTANT NOTE: If a pupil has been with you in nursery and is coming back in reception. Once the ATF has been imported on the Accept Applicants page, withdraw this applicant. This will then ensure the School History of the child on roll continues as the End of Year procedure runs and the pupil is moved up a year. Please see page 60 for details on withdrawing a pupil.

Importing Common Transfer Files (CTFs)

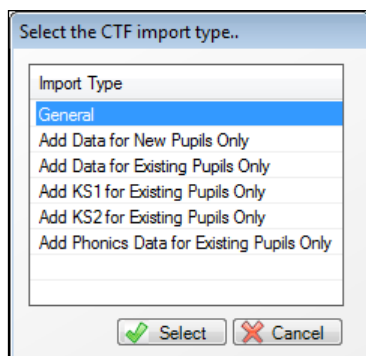
This section provides a summary of the steps required to import a CTF.

Import any CTFs that have not yet been imported. Pupil with CTFs can be imported into an admission group or directly on-roll.

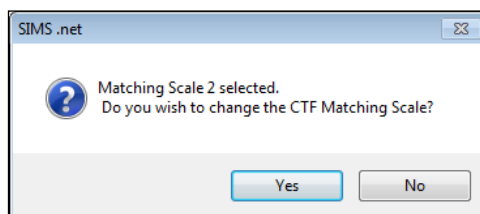
If any of the pupil in the CTF already exist in the system, any blank fields in their record are updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

Appropriate intake/admission groups must be created before you can import CTF files (please see *Adding Intake/Admission Groups* on page 34).

1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog. This dialog varies, depending on your school phase.



2. Highlight the required CTF import type then click the **Select** button to display a message asking you to confirm whether you wish to change the matching scale.



1 Data to be Imported

Student Basic Details	<input checked="" type="checkbox"/>	Student Address	<input checked="" type="checkbox"/>	Student Contacts	<input checked="" type="checkbox"/>	Looked After	<input checked="" type="checkbox"/>
SEN Information	<input checked="" type="checkbox"/>	Assessment Data	<input checked="" type="checkbox"/>	School History	<input checked="" type="checkbox"/>		
Attendance Summary	<input checked="" type="checkbox"/>	Programme of Study(PoS) Assessments	<input checked="" type="checkbox"/>	FSM History	<input checked="" type="checkbox"/>		

2 Import Selection

CTF File

Place new pupils in ▼ Effective Date

Pre-Admission Group	Admit On	Year Group
Autumn Year N2	02/09/2024	Year N2
2024/2025 - Autumn Year R (A)	02/09/2024	Year R

Proceed For Match Import

3. In the **Data to be imported** panel, indicate the data items you wish to import from the CTF by selecting the appropriate check boxes.
4. In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button adjacent to the **CTF File** field to display the **Select Import File** dialog. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import to CTF** page.
5. Select **Pre-Admission** from the **Place new pupils** in drop-down list to import the pupil into an admission group. The **On-roll** option is also available, but it is unlikely that September admissions would be imported directly on-roll.
6. Click the **Import CTF** button to start the import. Details of any errors are displayed in the Exception Log at the bottom of the **Import CTF** page.
7. Once you have finished importing the CTF, edit the details of the imported pupil as required.

Completed

Checking Dates for Part-Time Pupil

To ensure that pupils who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day. This is mostly relevant to Nursery schools (or schools with nursery age children).

If your school is taking Early Years pupils into Nursery you can add NC Year E1 and E2 to the pastoral structure in order to accommodate these pupils.

If you currently have a Nursery and take N1 and N2 pupils you should have your system set up with both NC 1 and NC 2 Years, as opposed to just one Year group of Nursery. This enables pupils to be assigned to the appropriate National Curriculum year when they join the school. This ensures the detail within the School Census return and means pupils can be promoted from N1 to N2 as part of the end of year routines.

NOTE: The School Census uses DOB to establish pupils in the Nursery, so this change is NOT a requirement for the Census.

If an additional year group is required, e.g. a Nursery year N1 has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection.

If you are not sure how your system is configured, please log a call with the Pennine Education Service Desk.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** then select the required pupil from the **Find Student** browser.
2. Click the **Registration** hyperlink to display the **Registration** panel.

2 Registration

<u>Class</u>	<input type="text" value="AM"/>	<u>House</u>	<input type="text"/>
<u>Year Group</u>	<input type="text" value="Year N2"/>	<u>Year Taught In</u>	<input type="text" value="Curriculum Year N2"/>
<u>Enrolment Status</u>	<input type="text" value="Single Registration"/>	<u>Boarder Status</u>	<input type="text" value="Not a Boarder"/>
<u>Admission Date</u>	<input type="text" value="01/09/2023"/>	<u>Admission Number</u>	<input type="text" value="001967"/>
<u>Former UPN</u>	<input type="text"/>	<u>Attendance Mode</u>	<input type="text" value="All day"/>
<u>UPN</u>	<input type="text" value="J823299923058"/>	<u>Local UPN</u>	<input type="text"/>

<u>Part Time Details</u>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Start Date</th> <th style="width: 30%;">End Date</th> </tr> </thead> <tbody> <tr> <td>04/09/2023</td> <td>19/07/2024</td> </tr> </tbody> </table>	Start Date	End Date	04/09/2023	19/07/2024	New Open Delete
Start Date	End Date					
04/09/2023	19/07/2024					

3. Check or amend the **End Date** in the **Part Time Details** table for any part-time pupil who will no longer be part-time, by clicking the **Open** button to display the **Edit Part-time Attendance** dialog.

4. Add or edit the **End Date** as required then click the **OK** button. The **End Date** is then displayed in the **Part Time Details** table.
5. Select **All day** from the **Attendance Mode** drop-down list.
6. Click the **Save** button to save any changes.

Once you have determined which pupil are part-time (i.e. which pupil are AM only or PM only), you need to define the part-time sessions and dates for the AM/PM groups for all or part of the coming year. Running this routine will also ensure that pupil who are no longer part-time will have their attendance records amended accordingly

Completed

Recording Leavers

This section provides a summary of the steps required to record leaver information in SIMS.

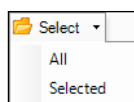
The facility to record leavers enables accurate records to be kept of pupils after they have left the school. During the Summer term you will need to mark most, or all of the pupils as leaving on the same day. You should only mark pupils as leavers if you are sure they are leaving, e.g. Year 6 pupils moving on to Secondary school.

IMPORTANT NOTES: It is essential that you do not record leavers by removing their date of admission as this affects all historical data relating to that pupil.

If someone who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove the date of leaving as this will affect the history, unless they had a date of leaving, but did not actually leave, i.e. changed their minds.

To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.



1. Select **Routines | Pupil (or Student) | Leavers** to display the **Find Student(s)** browser.
2. Search for the required pupil then double-click their name to display the **Manage Student(s) Leaving Details** page.
3. If you wish to assign a group of pupils as leavers, search on the appropriate **Year or Reg Group** by selecting from the appropriate drop-down lists. Highlight the required pupil using any of the following methods:
 - To select all the pupils displayed in the browser, select **All** from the **Select** drop-down menu.






- To select a group of pupils, highlight them using any of the following methods:
 - Hold down the **Ctrl** key and click each pupil to be selected.
 - To highlight sequentially listed pupils, click the first name in the list, hold down the **Shift** key then click the last name in the list.
- Once the required pupils have been highlighted, click the **Select** button to add them to the **Students** panel.


The selected pupils are then transferred to the **Students** panel.

1 Leaving Information

Date of Leaving  Reason for leaving End of phase transfer - Maintair  Assign to All



Destination after Leaving  Assign to Selected

Destination Institution  

Destination Expected Start Date  Grounds for Removal

2 Students

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution
Adams, Sadie	6	6KH	001521	01/09/2016				
Alyona, Tatyana	6	6KH	001522	01/09/2016				
Andrews, Richard	6	6KH	001523	01/09/2016				
Bartram, Piers	6	6VC	001602	01/09/2017				
Bennet, Eloise	6	6KH	001603	26/04/2021				
Brooks, Madison	6	6VC	001604	01/09/2017				
Clarke, Hamiette	6	6KH	001525	01/09/2016				
Clint, William	6	6VC	001605	01/09/2017				
Cummins, Jake	6	6VC	001606	01/09/2017				
Davey, Megan	6	6VC	001607	01/09/2017				
Davies, Adam	6	6KH	001526	01/09/2016				
Denton, Emma	6	6VC	001608	01/09/2017				
Donnelly, Robert	6	6KH	001609	01/09/2017				
Elliott, Josef	6	6VC	001527	01/09/2016				
Erikson, Finley	6	6KH	001528	01/09/2016				
Falmer, Michael	6	6VC	001593	01/09/2017				
Flemmina, Amber	6	6VC	001610	01/09/2017				

 Remove
 Clear

4. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button then select the required date.
5. Select the **Reason for leaving** from the drop-down list.
6. Enter the **Destination after Leaving**, if required. Alternatively, apply the **Reason for leaving** to one set of pupils (as described in the next step) then enter the **Destination after Leaving** for a different, or subset of pupils.
7. Select the **Destination Expected Start Date** from the Calendar.
8. Highlight the pupils to whom this information applies using the **Ctrl** and **Shift** keys then clicking their names (as described in step 3) then click the **Assign to Selected** button. If the information applies to all the pupils in the list, click the **Assign to All** button.
9. If an error has been made, highlight the pupil, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
10. To remove a pupil from the list, highlight their name then click the **Remove** button.
11. To clear the contents of the **Date of Leaving**, **Reason for Leaving** and **Destination after Leaving** columns in the **Students** panel, highlight the required pupil then click the **Clear** button. Re-enter the information as required.
12. Click the **Save** button to save the changes. The selected pupils are recorded with a date of leaving on the date specified.

 **Completed**

Exporting Common Transfer Files (CTFs)

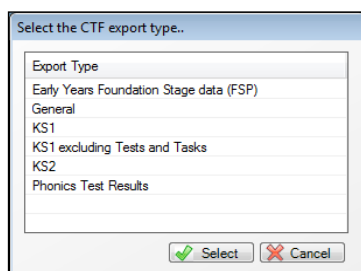
Common Transfer Files can be created and sent to other schools or Local Authorities.

NOTE: Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools | Other Schools** and specified the directory into which the CTF export will be saved via **Tools | Setups | CTF**.

Please ensure that the relevant pupils are given a **Date of Leaving** before exporting the CTF.

This section provides a summary of the steps required to export a CTF.

1. Select **Routines | Data Out | CTF | Export CTF** to display the **Select the CTF export type** dialog.



Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page. The page name is appended with the option selected in the previous dialog.

In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

1 Data to be Exported					
Student Basic Details	<input checked="" type="checkbox"/>	Student Address	<input checked="" type="checkbox"/>	Student Contacts	<input checked="" type="checkbox"/>
SEN Information	<input checked="" type="checkbox"/>	Assessment Data	<input checked="" type="checkbox"/>	School History	<input checked="" type="checkbox"/>
		Include KS1 Tasks/Tests	<input type="checkbox"/>		
Attendance Summary	<input checked="" type="checkbox"/>	Looked After	<input checked="" type="checkbox"/>	FSM History	<input checked="" type="checkbox"/>

2. Select the status of the pupil you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.
3. If you have already created a CTF file for some of the pupils but wish to include them in this CTF, select the check box to include pupils already exported in the export file.

2 Student Options

Effective Date View

Include students already exported Refresh Students

- Click the **Refresh Students** button to update the list of pupils displayed based on your selections. You can change the display order by clicking any of the column headings.
- In most circumstances, a single year group will be selected, such as Year 6. This is achieved by selecting the required year from the **Year Grp** drop-down list as shown in the following graphic.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
B820200106090	Acton	Samantha	EVC	6	6			
Q820200106091	Amoso	Rosanna	BKH	6	6			
E820200106092	Amoso	Silv	BKH	6	6			
U820200106093	Amoso	Stephanie	BKH	6	6			
Y820200106001	Andrews	Paul	BKH	6	6			
H820200106094	Angler	Harry	EVC	6	6			
B820200106003	Atkinson	Ben	BKH	6	6			
M820200106002	Atkinson	Ben	BKH	6	6			
X820200106095	Baker	James	BKH	6	6			
G820200106004	Bradbury	Christina	EVC	6	6			
L820200106096	Bradshaw	Jonn	EVC	6	6			
E820200106005	Brown	Jeremy	BKH	6	6			

- Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupils as follows:

- Hold down the **Ctrl** key and click each pupil to be selected.
- To highlight sequentially listed pupils, click the first name in the list, hold down the **Shift** key, then click the last name in the list.
- To select all the pupils, right-click anywhere in the table then select **Select All** from the pop-up menu.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
B820200106090	Acton	Samantha	EVC	6	6			
Q820200106091	Amoso	Rosanna	BKH	6	6			
E820200106092	Amoso	Silv	BKH	6	6			
U820200106093	Amoso	Stephanie	BKH	6	6			
Y820200106001	Andrews	Paul	BKH	6	6			
H820200106094	Angler	Harry	EVC	6	6			
B820200106003	Atkinson	Ben	BKH	6	6			
M820200106002	Atkinson	Ben	BKH	6	6			
X820200106095	Baker	James	BKH	6	6			
G820200106004	Bradbury	Christina	EVC	6	6			
L820200106096	Bradshaw	Jonn	EVC	6	6			
E820200106005	Brown	Jeremy	BKH	6	6			

- Click the **Export CTF** button to create the export file.

After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupils in the file, the number processed and the number not exported.

4 Exception Log						
Number of students in file: 59		Number of students processed: 59		Number of students not exported: 0		
UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
L820200106096	Bradshaw	Jonn	M	02/02/2004	No ENG Results exported since ther...	8232999_CTF_8234321_006
L820200106096	Bradshaw	Jonn	M	02/02/2004	No ENG Results exported since ther...	8232999_CTF_8234321_006
A820200106097	Bukolt	Kyystal	F	05/09/2003	No ENG Results exported since ther...	8232999_CTF_8234321_006
A820200106097	Bukolt	Kyystal	F	05/09/2003	No ENG Results exported since ther...	8232999_CTF_8234321_006
A820200106097	Bukolt	Kyystal	F	05/09/2003	No ENG Results exported since ther...	8232999_CTF_8234321_006
P820200106098	Carly	Carly	F	11/11/2003	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_006
A820200106012	Douglas	David	M	05/02/2004	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_006
F820200106106	Gorman	Michael	M	02/03/2004	The 9th point for FSP PSE AS3 has ...	8232999_CTF_8234321_006
G820200106016	Graham	Elaine	F	12/11/2003	The 9th point for FSP PSE AS1 has ...	8232999_CTF_8234321_006

Any errors must be corrected before the pupils can be successfully included in the CTF export file.

8. Navigate to the location of the **CTF Export Directory** (as defined in **Tools | Setups | CTF**) then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer mechanism, such as School to School. Please contact your Local Authority if you are unsure how to transfer the CTF.

Completed

Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupils in case there are any exceptions (please see *Viewing/Setting the Promotion Path for Individual Pupil* on page 54).

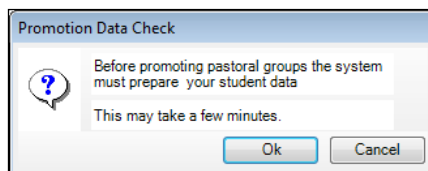
Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

You can repeat the process a number of times until you are happy that all pupils have been mapped to the appropriate classes.

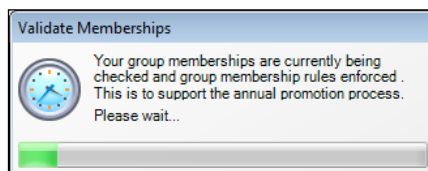
BEFORE PROCEEDING: Please check that you have carried out the following:

- Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).
- Created the new academic year.
- Amended your pastoral structure as required, such as adding new classes.

1. Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog. You are advised that pupils data needs to be prepared (all current group memberships are checked and confirmed).



2. Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

Academic Year:
Promote from: Academic Year 2023/2024 [Load]

Year Group

Year Group	Promotion Path

Override membership [Set Default]

Class

Year	Registration Group	Promotion Path	Supervisor	Promote Registration Tutor	Promote Other Supervisors

Override membership [Finish]

3. The current academic year should be selected automatically from the **Promote from** drop-down list. If it is not selected automatically, select it from the drop-down list then click the **Load** button.

WARNING: It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.

4. The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on). This is the

same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.

5. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column then selecting the required year from the drop-down list.

NOTE: Schools that have a year group **N1** must ensure that this is mapped to **N2**.

Setup Promotion Mapping from Academic Year 2023/2024

Academic Year:
 Promote from: Academic Year 2023/2024 Load

Year Group

Year Group	Promotion Path
N2	R
R	1
1	2
2	3
3	4

Override membership Set Default

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	ELM	2JB	Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	PINE	2GH	Mr Oliver Joyner	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	ASH	2JB	Miss Amelia Kent	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	OAK	2GH	Miss Shirley Fortune	<input type="checkbox"/>	<input type="checkbox"/>

Override membership Finish

If your school has a vertical structure, the years are displayed the same in the **Year** column as they are displayed in the following example.

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N1	N1 AM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1	N1 PM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	ELM		Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	PINE		Mr Oliver Joyner	<input type="checkbox"/>	<input type="checkbox"/>

To facilitate the identification of year group names, drag the dividing line of the column heading to increase the size of the **Year** column.

6. Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column then select the class to which the pupil will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.
7. The **Registration Tutor** column displays the name of the current class tutor. If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.
8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process.

This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupil in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

IMPORTANT NOTE: *If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the Override Membership check box is not selected if you wish to retain your previous settings.*

10. Click the **Finish** button and then **Save** the settings.
11. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

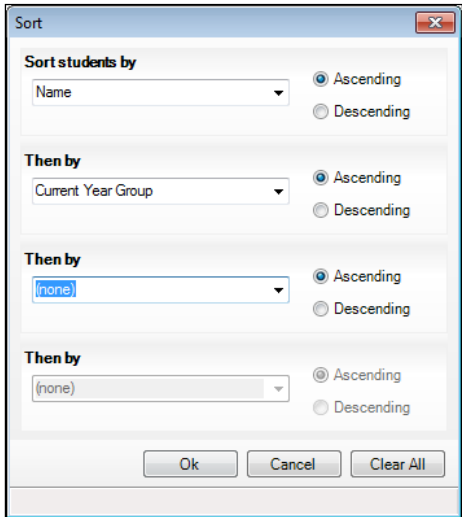
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
<input type="checkbox"/> Current Year Group: N2					
<input type="checkbox"/> Current Year Group: R					
<input type="checkbox"/> Current Year Group: 1					
<input type="checkbox"/> Current Year Group: 2					
<input type="checkbox"/> Current Year Group: 3					
<input type="checkbox"/> Current Year Group: 4					
<input type="checkbox"/> Current Year Group: 5					
<input type="checkbox"/> Current Year Group: 6					

Viewing/Setting the Promotion Path for Individual Pupil

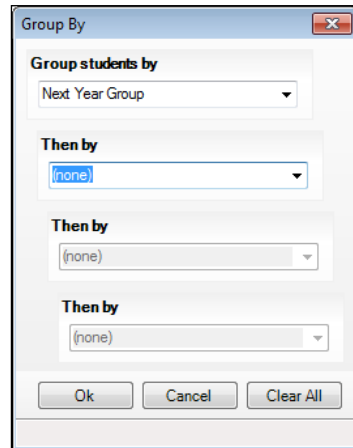
- 1. Double-click the current year group for which you wish to view or set individual promotion paths, to view the promotion path for each pupil.

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
[-] Current Year Group: N2					
[-] Current Year Group: R					
[-] Current Year Group: 1					
[-] Current Year Group: 2					
Adams, Laura	<input type="checkbox"/>	2	3	2JB	3TO
Amnar, Tarak	<input type="checkbox"/>	2	3	2JB	3TO
Astwick, Gwenneth	<input type="checkbox"/>	2	3	2JB	3TO
Bond, Steve	<input type="checkbox"/>	2	3	2JB	3TO
Cameron, Zara	<input type="checkbox"/>	2	3	2GH	3CB
Carter, Hannah	<input type="checkbox"/>	2	3	2JB	3TO
Churchill, Martin	<input type="checkbox"/>	2	3	2JB	3TO
Cookson, Harry	<input type="checkbox"/>	2	3	2JB	3TO
Cosenza, Isabella	<input type="checkbox"/>	2	3	2JB	3CB
Defeo, Lorenzo	<input type="checkbox"/>	2	3	2JB	3TO
Dennis, Tommy	<input type="checkbox"/>	2	3	2GH	3CB
Dixon, Stephanie	<input type="checkbox"/>	2	3	2JB	3TO

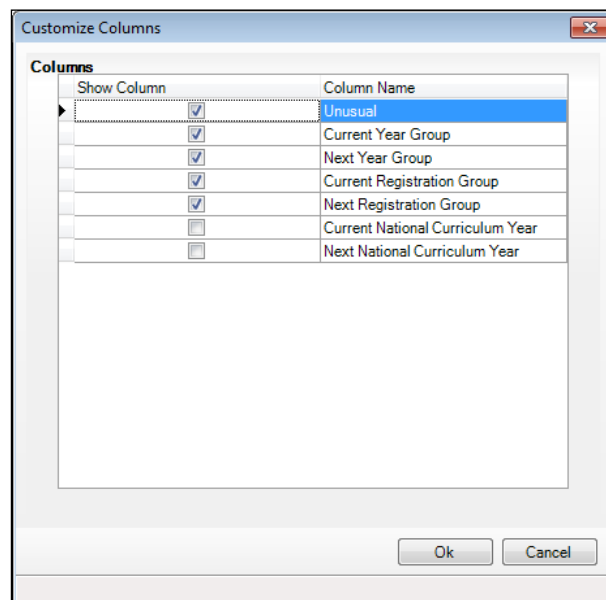
- 2. You can customise the view on this screen by selecting an option from the **Customize** drop-down list.
 - Select **Sort** to display the **Sort** dialog, which enables you to order the contents of the columns, as shown in the following example.



- Click the **Customize** button down arrow and select **Group By** to display the **Group By** dialog, which enables you to change the groupings, as shown in the following example.



- Select **Columns** to display the **Customise Columns** dialog, which enables you to choose the columns you wish to include in the display.



- Once expanded, you can change the year or class for individual pupils by clicking in the appropriate column and selecting a different year or class from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog). Repeat the process for any other pupil, if required.

Multiple pupils can be highlighted using any of the following methods:

- Hold down the **Ctrl** key then click each pupil you wish to select.

Adams, Laura	<input type="checkbox"/>	2	3	2JB	3TO
Amnar, Tarak	<input type="checkbox"/>	2	3	2JB	3TO
Astwick, Gwenneth	<input type="checkbox"/>	2	3	2JB	3TO
Bond, Steve	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Cameron, Zara	<input type="checkbox"/>	2	3	2GH	3CB
Carter, Hannah	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Churchill, Martin	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Cookson, Harry	<input type="checkbox"/>	2	3	2JB	3TO
Cosenza, Isabella	<input checked="" type="checkbox"/>	2	3	2JB	3TO
Defeo, Lorenzo	<input type="checkbox"/>	2	3	2JB	3TO
Dennis, Tommy	<input checked="" type="checkbox"/>	2	3	2GH	3CB
Dixon, Stephanie	<input type="checkbox"/>	2	3	2JB	3TO

- To highlight sequentially listed pupils, click the first name in the list, hold down the **Shift** key then click the last name in the list.

NOTE: If the **Filter** button is deselected, all Year Groups and classes are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Class**.

For example, a pupil currently in **Year Group R** would normally be expected to promote into **Year Group 1**. It is possible (for whatever reason) that this pupil will actually be promoted into **Year Group 2** in the forthcoming academic year. To enable you to achieve this, click the **Filter** button and select the required **Year Group** and **Class** from the drop-down lists.

- Click the **Save** button to save the promotion mappings. The promotion occurs at the beginning of the next academic year. A warning is displayed if any unusual promotions have been set. Accept the warning by clicking the **Yes** button.

Completed

Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure**.
2. Click the + icon adjacent to **Pastoral Structure** to reveal each registration group.
3. Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.
4. If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for then selecting the required person. Click the **OK** button.

If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** table. Select the **Role** of **Joint Main Supervisor** from the drop-down list then select the required person by clicking the **Browser** button then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection. Click the **OK** button to return to the pastoral structure then click the **Save** button once you have assigned all the required registration tutors.

Completed

Changing the Status of Applications to Offered or Accepted

This section describes how to change the status of applications to your school for the forthcoming academic year in bulk. Applications can be added manually or imported via ATF or CTF. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining. It is possible however, to change an application status from **Applied** to **Accepted** or even straight to **Admitted**, if required.

It is also possible to change the application status of individual applicants.

This section assumes that you have added all of the required applicants via **Focus | Admission | Application**, and that you have imported via CTF or ATF.

Finalising Offers

If you wish to offer places to applicants, please follow the instructions outlined in this section. If you do not want to record offers made, but wish to identify applicants who have accepted a place at your school, please proceed to *Accepting Applicants*.

1. Select **Routines | Admission | Finalise Offers** to display the **Find Intake Group** browser.

Name	<input type="text"/>	Admission Season	<Any>	Status	Active	
Admission Year	<Any>	Year Group	<Any>			
Name	Admission Year	Admission Season	Year Group	Planned Admission	Status	
2024/2025	Autumn Year N2	2024/2025	Autumn	Year N2	20	Active

2. Search for then double-click the required intake group to display the **Finalise Offers** page.

1 Summary							
Planned Admission	<input type="text" value="20"/>	Offered	<input type="text" value="7"/>				
Total Applicants	<input type="text" value="7"/>	Accepted	<input type="text" value="0"/>				
Applied	<input type="text" value="0"/>	Withdrawn	<input type="text" value="0"/>				
		Admitted	<input type="text" value="0"/>				
		Rejected	<input type="text" value="0"/>				
2 Applications							
Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
<input type="radio"/>	Achmed, Dobir	Male	12/11/2014	Offered		<input checked="" type="checkbox"/>	
<input type="radio"/>	Bailey, David	Male	11/03/2015	Offered		<input checked="" type="checkbox"/>	
<input type="radio"/>	Davis, Amy	Female	29/03/2015	Offered		<input checked="" type="checkbox"/>	
<input type="radio"/>	Honeywell, George	Male	04/06/2015	Offered		<input checked="" type="checkbox"/>	
<input type="radio"/>	Snape, Louisa N	Female	12/11/2014	Offered		<input checked="" type="checkbox"/>	
<input type="radio"/>	Tang, James	Male	23/06/2015	Offered		<input checked="" type="checkbox"/>	
<input type="radio"/>	White, Ray	Male	13/03/2015	Offered		<input checked="" type="checkbox"/>	

- 3.

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied**. Own Admission Authority schools are also provided with the **Late Applications** field.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel shows all the applicants who have applied for a place at your school, together with the status of their application.

- To change the application status, click the required cell for each applicant.

Accepting Applicants

This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

The following instructions demonstrate how this can be achieved for all pupils in an intake group. It can also be achieved at individual pupil level via **Focus | Admission | Applicants**.

- Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2024/2025 - Autumn Year R	2024/2025	Autumn	Year R	30	Active
2024/2025 Autumn Year N2	2024/2025	Autumn	Year N2	20	Active

- Search for then double-click the required intake group to display the **Accept/Decline Applications** page.

1 Summary

Planned Admission	<input type="text" value="20"/>	Accepted	<input type="text" value="0"/>
Total Applicants	<input type="text" value="7"/>	Withdrawn	<input type="text" value="0"/>
Applied	<input type="text" value="0"/>	Rejected	<input type="text" value="1"/>
Offered	<input type="text" value="6"/>	Admitted	<input type="text" value="0"/>

2 Applications

Current Application Status:

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Achmed, Dobir	Male	12/11/2014	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balley, David	Male	11/03/2015	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Davis, Amy	Female	29/03/2015	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Honeywell, George	Male	04/06/2015	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Snape, Louisa N	Female	12/11/2014	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
White, Ray	Male	13/03/2015	Offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

- 3. Click the **Accepted** column for each applicant who has accepted a place at your school. To accept, click in the cell to put a tick in it. To withdraw, click the **Withdraw** column.

The screenshot shows a software interface for managing applications. It is divided into two main sections: '1 Summary' and '2 Applications'.

1 Summary

Planned Admission	20	Accepted	0
Total Applicants	7	Withdrawn	0
Applied	0	Rejected	1
Offered	5	Admitted	0

2 Applications

Current Application Status: Offered

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Achmed, Dobir	Male	12/11/2014	Accepted		✓	
Bailey, David	Male	11/03/2015	Accepted		✓	
Davis, Amy	Female	29/03/2015	Offered	✓		
Honeywell, George	Male	04/06/2015	Accepted		✓	
Snape, Louise N	Female	12/11/2014	Accepted		✓	
White, Ray	Male	13/03/2015	Offered	✓		

- 4. If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.
- 5. Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.



Adding Leaving Dates for Existing Staff Members in Personnel

Enter leaving dates for any teachers as soon as they have left your school.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
2. Search for and then select the required member of staff to display their details on the **Employee Details** page.
3. Click the **Employment Details** tab to display the **Employment Details** panel.
4. In the **Employment Dates** table, highlight the required record then click the **Open** button to display the **Edit Employment History** dialog.

Details	
Employment Start Date	07/09/1993
Date of Leaving	20/08/2022
Continuous Service Start Date	06/08/1992
Local Authority Start Date	06/08/1992
Previous Employer	Housewife
Next Employer	
Notes	

OK Cancel

5. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.

6. Click the **OK** button to return to the **Employee Details** page.

1 Employment Details

Teaching Staff Teacher Number

Teacher Category Qualified Teacher Status

Staff Code Employee/Payroll No.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
07/09/1993	20/08/2022	06/08/1992	06/08/1992	Housewife	

Check

Check	Clearance Date	Clearance Level
List 99	26/03/2006	List 99 Cleared
CRB Check	05/09/2002	CRB Enhanced Clearance

Contract

Status	Start Date	Post	Service Term	Point/Salary
	01/09/2011	Midday Supervisor	NJC - APT & C Staff	11.0
X	07/09/1993	Midday Supervisor	Manual Staff	1.0

Buttons: New, Open, Delete (for Employment Dates, Check, and Contract sections)

7. Click the **Save** button to save the changes. Repeat for any other leavers.

Completed

Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

- added the applicants by clicking the **Application** icon on the toolbar or selecting **Focus | Admission | Application**, or imported via CTF.



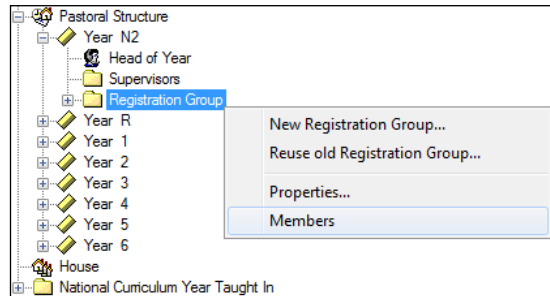
Application icon

- changed the applicant's application status (please see *Changing the Status of Applications to Offered or Accepted* on page 59) to **Offered** or **Accepted**.

- Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

- Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



- Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

The **Name**, **Gender**, current **Year Group** and current **Reg Group** are displayed for each applicant together with the total number of applicants allocated to each class (at the bottom of the grid). Right-click any column heading to change the order.

Student Status					
<input checked="" type="checkbox"/> Students	<input checked="" type="checkbox"/> Accepted Applications	<input checked="" type="checkbox"/> Current Applications (Applied / Offered / Reserved)			
Members					
Name	Gender	Year Group	Reg Group	N1 AM	N1 PM
Achmed, Dobir	Male	Year N1		✓	
Bailey, David	Male	Year N1		✓	
Davis, Amy	Female	Year N1			✓
Honeywell, George	Male	Year N1		✓	
Snape, Louisa N	Female	Year N1			✓
White, Ray	Male	Year N1			✓

The **Student Status** section enables you to limit the applicants displayed in the grid, as follows:

- **Students** – select this check box to display any on-roll pupil who have been assigned to any class within the selected year. These pupil are displayed with a grey background.
- **Accepted Applications** – select this check box to display any applicants who have an application status of **Accepted** (i.e. they have accepted a place at your school). These applicants are displayed with a pink background.
- **Current Applications** – select this check box to display any applicants who have an application status of **Offered** (i.e. they have been offered a place at your school). These applicants are displayed with an orange background.

NOTE: Although you can specify which class the applicants will go in, the applicants must be admitted (via **Routines | Admission | Admit Applications**) before they become a member of this class.

Additional columns (**House, Ethnicity, Previous School, Admission no.** and **Date of Birth**) can also be displayed on the grid by selecting the appropriate option from the **Actions** drop-down menu.

Members						Print	Actions
Name	Gender	Year Group	Reg Group	N1 AM	N1 PM		
Achmed, Dobir	Male	Year N1		✓			Gender
Bailey, David	Male	Year N1		✓			Year
Davis, Amy	Female	Year N1			✓		Reg
Honeywell, George	Male	Year N1		✓			House
Snape, Louisa N	Female	Year N1			✓		Ethnicity
White, Ray	Male	Year N1			✓		Previous School
							Admission no.
							Date of Birth
							View Single
							View Triple

The previous graphic shows that **Date of Birth** has been added to the grid. It can also be useful to change the view to **View Triple**, which displays a breakdown of totals for females and males in each group.

4. Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.
5. Once you have selected classes for each the applicants, click the **OK** button to save the changes.

Completed

Printing Class (Registration Group) Lists for the New Academic Year

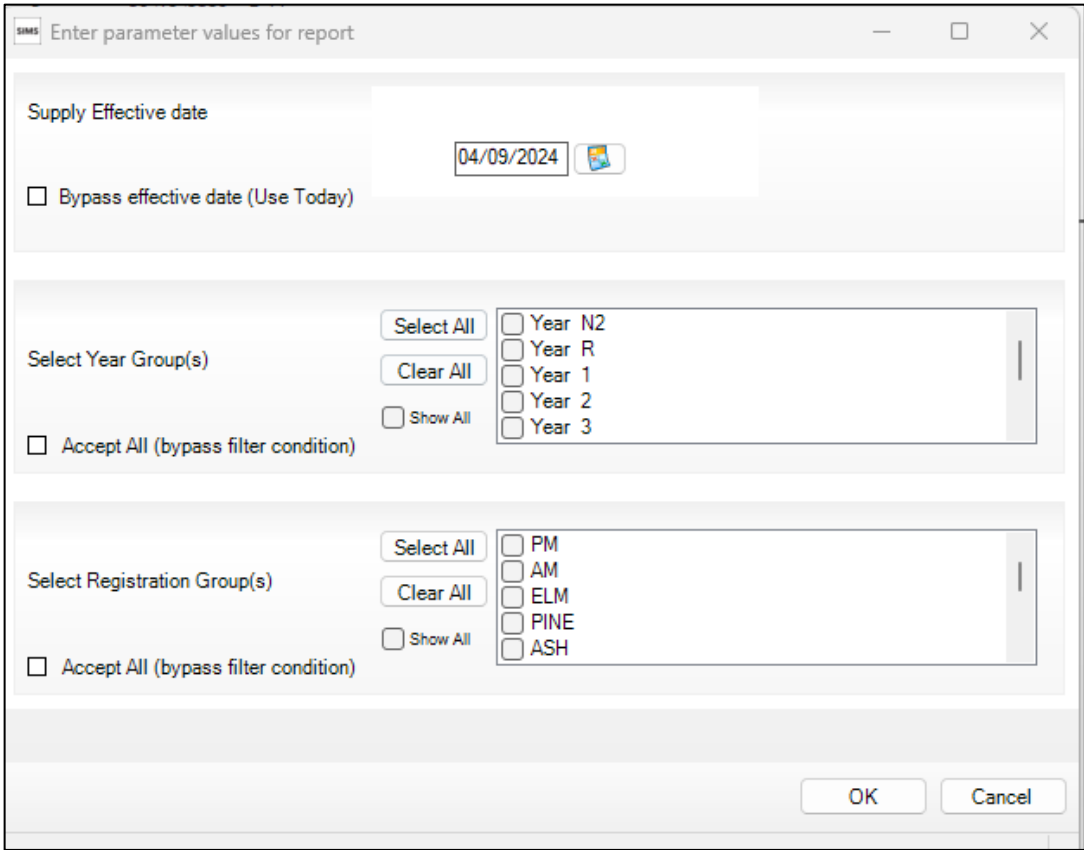
Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- Registration Groups (Dated)
- Registration Groups (Dated – DOB Sort)
- Registration Groups (Dated – Gender Sort)
- Registration Groups (Dated with Columns).

If these reports do not exist on your system, you need to import the latest pre-defined reports.

Select **Reports | Run Report** to display the **Report** browser.

- 6. Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.



- 7. Deselect the **Bypass effective date** check box.
- 8. Enter the required date, e.g. 06/09/2024 or click the **Calendar** button and select the required date.
- 9. Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

Registration Groups (Dated) Report

Registration Groups (Dated)		
Registration Groups (Dated)		
<i>Year group is Year 5, Year 6, Year N2 or Year R</i>		
Registration Group: 5BB		
Tutor:	Miss B E Bates	
Room:	n/a	
Effective date:	30/04/2021	
Name	Gender	Date of Birth
Akeman Richard	M	02-02-2011
Alamilla Sofia	F	02-12-2010
Banin Valeriya	F	22-10-2010
Barrick Molly	F	10-01-2011
Cain William	M	05-12-2010
Castagno Luca	M	21-03-2011
Cichy Viktor	M	20-06-2011
Davies Tamson	F	02-04-2011
DeFeo Elena	F	25-04-2011
Downham Monty	M	19-11-2010
Elliott Michael	M	23-06-2011
Flint Ryan	M	26-01-2011
Gaida Sebastian	M	11-11-2010
Harvey George	M	09-12-2010
Hossein Jasmir	M	16-12-2010
Kienan Henry	M	20-01-2011
Lok Cheng	M	12-02-2011
Mason Philip	M	12-12-2010
Miles Pheobe	F	03-08-2011
Miller Paul	M	27-09-2010
Nabendu Aadi	M	21-03-2011
Paradis Kostas	M	30-09-2010
Preston Lucy	F	28-03-2011
Rashed Daania	F	03-02-2011
Regan Mark	M	17-05-2011
Shakoor Bharavi	M	05-04-2011
Taylor Megan	F	03-03-2011
Whelan Ariel	F	02-05-2011
Zafar Layla	F	12-09-2010
Zilinskwi Blanka	F	17-03-2011
Total: Males	18	
Total: Females	12	
Group Total:	30	

Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report but in Date of Birth order.

Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.

Completed

02 | Processes to be Carried Out in Other SIMS Modules

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In SIMS Attendance - Entering Reasons for Absence Last Year

If you are using OMR Absence sheets, read the sheets in via **Routines | Attendance | OMR Entry | Read OMR Absence Sheets**.

If you are using Edit Marks (via **Focus | Attendance | Edit Marks**), put the date back in the **Week Beginning** field to the required date, then click the **Search** button.

Short Name	Description
PM	PM
AM	AM
ELM	ELM
PINE	PINE
ASH	ASH
OAK	OAK

Double-click the required class to display marks for the chosen group(s) then edit as required. Selecting the **Show only students with Unexplained Absences today** check box may speed up this process.

Save Undo Print Refresh Codes Preserve Minutes Late Comments Vertical Links Help Unpin Close												
Previous Week Next Week Select All <input type="checkbox"/> Show only students with Unexplained Absences today												
Attendance Dinner Register												
Name	Reg	Interventions	Mon 19/03		Tue 20/03		Wed 21/03		Thu 22/03		Fri 23/03	
			AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
Clark, Felicity	N1 AM		/	x	/	x	/	x	/	x	/	x
Hollins, Bridget	N1 AM		/	x	/	x	/	x	/	x	/	x
Sauzo, Amiaz	N1 AM		/	x	/	x	/	x	/	x	/	x
Sonin, Marku	N1 AM		/	x	/	x	/	x	/	x	/	x

 Completed

Dinner Money

There are no end of year processes in Dinner Money. However, the following activities should be carried out:

- It is advisable to reconcile pupil and staff balances, issue refunds or collect debts (where possible) before the end of term, particularly for any pupil or staff who are leaving the school.
- Any meal price changes should ideally be entered at the start of the academic year, as additional processing will be necessary to remove recorded meals and add price changes retrospectively. These can be entered via **Tools | Dinner Money | Pupil Meal Definitions/Staff Meal Definitions/Adhoc Meal Definitions** and/or **Other Sales Definitions**.
- Print the final catering return on the last day of term.
- Where appropriate, send the debt and credit reports (produced via **Reports | Dinner Money | Finance | Pupil Balances** or **Staff Balances**) to the caterers.
- Prior to the start of the new catering year, a new catering year should be created via **Tools | Dinner Money | Setup**, corresponding to the start of the new catering year.

NOTE: *The new academic year should be created first. You will then need to close and re-open SIMS before adding the new catering year.*

The catering year may not correspond with the academic year.

You may choose to print off a copy of the Pupil Balances and Staff Balances reports (via **Reports | Dinner Money | Finance | Pupil** (or **Staff**) **Balances**) from the date of your opening balances in Dinner Money to the last working day of the current academic year as a record of opening balances, all meals taken, transactions and balances at the year end.

Meal Charges Mapping

Tools | Dinner Money | Setup

Please be aware of the following, in cases where schools have mapped meal charges to classes/registration groups, rather than to either Tiers or Year groups (as the latter two are less likely to change).

It is not possible to change the meal charges mapping from, for example, classes to year groups. If schools change their class names in September, but simply rename the old class names, the existing meal definitions will continue to work with the new names.

If schools create new classes and make old classes inactive, in September an error message will be displayed when trying to enter payments because any meals recorded in the new classes will not be mapped to the existing meal definitions. Also, schools will not be able to add the new classes to the existing meal definitions/charges because the meals will have already been recorded (even if they try to delete the recorded meals).

To prevent this issue occurring, you must either:

- Create new meal definitions for the new classes, adding the meal price (with a start date before the start of term) and selecting all the new classes. This will need to be done for all active meal types, including Absent, Other School, etc. The disadvantage of this is that in future schools will need to add price changes to both meal definitions, to cover all classes.

or

- Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2024. Enter a new meal definitions, with meal charges having a start date of, e.g. 04/09/2024 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

This must be done before the start of the new academic year.

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2024. Enter a new meal definitions, with meal charges having a start date of, e.g. 03/09/2024 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

After the New Academic Year has Started

The following routines should be undertaken once the new academic year has been started.

- In SIMS, admit applicants (please see *Admitting Applicants* on page 70).
- In SIMS, record any re-admission pupil (please see *Re-Admitting Pupil* on page 73).
- In Attendance, print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page 74).
- In Attendance, use the Part-Time Pupil routine to add Not Required codes (please see *In SIMS Attendance - Using the Part-Time Pupil Routine to Add Not Required Codes* on page 75).

Admitting Applicants

Applicants should be admitted on the first day that they actually arrive at the school. If, however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

NOTE: Guest pupil will be admitted and a pupil record created. They will not have an admission number (because they are a guest) and therefore, will not appear on-roll. They can be selected from the **Find Pupil** (or **Student**) browser (via **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details**) by selecting **Guest** from the **Status** drop-down list.

For more detailed instructions, please refer to the appropriate *Admissions* handbook.

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2024/2025 - Autumn Year R	2024/2025	Autumn	Year R	30	Active
2024/2025 Autumn Year N2	2024/2025	Autumn	Year N2	20	Active

2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.

Summary			
Total Applicants	4	Accepted	3
Planned Admission	8	Withdrawn	0
Applied	0	Rejected	0
Offered	1	Admitted	0

Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).

The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name, Gender, Date of Birth, proposed Date of Admission, Enrolment Status,**

Application Status, UPN and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

2 Applications									
Application Status: Offered									
Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Achmed, Dobir	Male	12/11/2014	04/09/2020	Single Registration	Offered		No Change		
Bailey, David	Male	11/03/2015	04/09/2020	Single Registration	Offered	R874245499010	No Change		
Davis, Amy	Female	29/03/2015	04/09/2020	Single Registration	Offered		No Change		
Honeywell, George	Male	04/06/2015	04/09/2020	Single Registration	Offered		No Change		
Snape, Louisa N	Female	12/11/2014	04/09/2020	Single Registration	Offered		No Change		
White, Ray	Male	13/03/2015	04/09/2020	Single Registration	Offered	H820999906001	No Change		

- If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list then follow the remainder of this process.
- If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN**, as shown in the following graphic.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Achmed, Dobir	Male	12/11/2014	04/09/2020	Single Registration	Offered		Assign Permanent..		
Bailey, David	Male	11/03/2015	04/09/2020	Single Registration	Offered	R874245499010	No Change		
Davis, Amy	Female	29/03/2015	04/09/2020	Single Registration	Offered		Assign Permanent..		
Honeywell, George	Male	04/06/2015	04/09/2020	Single Registration	Offered		Assign Permanent..		

- To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**, as shown in the following graphic.

2 Applications									
Application Status: Offered									
Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Achmed, Dobir	Male	12/11/2014	04/09/2020	Single Registration	Offered		Assign Permanent..		
Bailey, David	Male	11/03/2015	04/09/2020	Single Registration	Offered	R874245499010	No Change		
Davis, Amy	Female	29/03/2015	04/09/2020	Single Registration	Offered		Assign Permanent..		
Honeywell, George	Male	04/06/2015	04/09/2020	Single Registration	Offered		Assign Permanent..		
Snape, Louisa N	Female	12/11/2014	04/09/2020	Single Registration	Offered		Assign Permanent..		
White, Ray	Male	13/03/2015	04/09/2020	Single Registration	Offered	H820999906001	No Change Assign Permanent UPN Assign Temporary UPN		

- Permanent UPNs are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
- Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant's information).



Application icon

- If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you

wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Achmed, Dobir	Male	12/11/2014	04/09/2020	Single Registration	Admitted		Assign Permanent..	✓	
Bailey, David	Male	11/03/2015	04/09/2020	Single Registration	Admitted	R874245499010	No Change	✓	
Davis, Amy	Female	29/03/2015	04/09/2020	Single Registration	Admitted		Assign Permanent..	✓	
Honeywell, George	Male	04/06/2015	04/09/2020	Single Registration	Admitted		Assign Permanent..	✓	
Snape, Louisa N	Female	12/11/2014	04/09/2020	Single Registration	Withdrawal		No Change		✓
White, Ray	Male	13/03/2015	04/09/2020	Single Registration	Admitted	H820999906001	No Change	✓	

- Once complete, click the **Save** button to admit the applicants. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.



Re-Admitting Pupils

This section contains a summary of the required steps. For detailed instructions, please refer to the appropriate *Admissions* handbook.

Any pupils who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures that the pupil's educational **History** is maintained.

IMPORTANT NOTES: *It is essential that you follow this process for re-admissions (i.e. for pupils who have left your school and subsequently return). Do not remove the **Date of Leaving** as a method of re-admitting. However, if the pupil was originally leaving and changes their mind, i.e. they do not actually leave, then you should remove their **Date of Leaving**.*

*It is perfectly acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the pupil leaves in July but returns in September). If you do not want any gaps in the associated class memberships, then you will need to edit the history via **Focus | Pupil (or Student) | Pupil (or Student) Details** page by clicking the **History** button in the **Registration** panel.*

- Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Pupil (or Student) Details** page.
- Click the **New** button to display the **Add Student** page.
- Enter the pupil's known details into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.

4. Highlight the required pupil and click the **Open** button to display a warning message **The selected pupil is a Leaver, do you want to re-admit the Pupil?**
5. If you are certain that this is the pupil who should be re-admitted, click the **Yes** button to display the pupil's details.
6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil's details.
7. Click the **Save** button again if any additional data has been added.

**Completed**

In SIMS Attendance - Printing the Official Register for July

Before printing the official register for July, you should deal with missing marks and add reasons for absence for the month you are going to print.

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the **Official Register Report** page.

Short Name	Description
PM	PM
AM	AM
ELM	ELM
PINE	PINE
ASH	ASH
OAK	OAK
2JB	2JB
2GH	2GH
3TO	3TO
3CB	3CB
4ES	4ES
4SL	4SL
5BB	5BB
5DT	5DT
6VC	6VC
6KH	6KH

2. Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.

**Completed**

In SIMS Attendance - Using the Part-Time Pupil Routine to Add Not Required Codes

The sessions when part-time pupils, i.e. pupils of non-statutory school age, are not required to attend school can be specified using this routine. SIMS then applies the Non-compulsory school-age absence code (**X**) to the sessions that occur during the specified date range. The Week Range dates must lie within the new academic year and we would advise that you use the working academic year dates as explained in the following example.

The part-time pupils functionality is available via a dedicated menu route (**Tools | Setups | Attendance Setup | Part Time Pupils**). To ensure that the dedicated menu route is available, select the Show **Part-time Pupils** check box in the **Visibility Switches** panel.

1. Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.

Part Time Pupils

Search Overwrite Apply

From w/b 04/09/2023 to w/b 15/07/2024 Group Type Part Time Group

Short Name	Description
AM	AM only
PM	PM only

Select All Deselect All

Enter 'Not Required' codes

Attendance required in mornings only
 Attendance required all day
 Attendance required in afternoons only
 Apply a weekly pattern of Not Required codes

Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Specify the date range appropriate to the period for which your chosen group will be part-time. The dates must lie within the academic year.
3. Highlight the required groups (using **Ctrl** or **Shift** to highlight multiple groups). The **Select All** and **Deselect All** button can also be used if required.
4. Specify when attendance is required by selecting one of the radio buttons.

Enter 'Not Required' codes

Attendance required in mornings only
 Attendance required all day
 Attendance required in afternoons only
 Apply a weekly pattern of Not Required codes

- Attendance required in mornings only
- Attendance required in afternoons only
- Attendance required all day

Select this option when a part-time pupil starts full-time school. All 'Not Required' codes for the pupils are removed from the system.

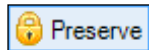
- Apply a weekly pattern of Not Required codes

Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupil are not required to attend school.

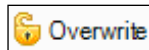
In the following example, the pupil are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day on Wednesday.

	Mon AM	Mon PM	Tue AM	Tue PM	Wed AM	Wed PM	Thu AM	Thu PM	Fri AM	Fri PM
I	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Existing marks can be protected or overwritten. This is achieved by clicking the **Preserve/Overwrite** toggle button.



Preserve toggle button



Overwrite toggle button

NOTE: If the **Overwrite** button is selected, SIMS saves the specified pattern of marks (overwriting any existing marks), for all sessions in the selected range of weeks.

- Click the **Apply** button to apply the codes to the selected part-time pupils.