



SIMS PRIMARY EOY ROUTINES & PROCEDURES QUICK REFERENCE SHEET

End of Year Procedure Check List
Please see Pennine Primary SIMS EOY document for further guidance:

Before you start your End of Year Procedures, please note the below points:



You **MUST** complete the creation of the Academic Year and Pupil Promotion Routines **BEFORE** your current year ends.



CRITICAL

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.



Permissions needed in SIMS:
School Administrator
Admissions Officer

Complete	Description/Task
<input type="checkbox"/>	Record changes to teaching staff in Personnel ➤ Focus>Person>Staff - Page 4
<input type="checkbox"/>	Create the new academic year ➤ Routines>School>Academic Year – Page 7
<input type="checkbox"/>	Set up the pastoral structure for the new academic year ➤ Focus>School>Pastoral Structure>Next Academic Year Structure – Page 20
<input type="checkbox"/>	Add intake and admission groups ➤ Routines>Admission>Admission Groups>Setup– Page 34
<input type="checkbox"/>	Import Admissions and Transfer Files (i.e. ATF) ➤ Routines>Admission>Import ATF File – Page 38
<input type="checkbox"/>	Import Common Transfer Files ➤ Routines>Data In>CTF>Import CTF – Page 43
<input type="checkbox"/>	Check dates for part-time pupil ➤ Focus>Pupil>Pupil Details>Registration Panel – Page 45
<input type="checkbox"/>	Record leavers ➤ Routines>Pupil>Leavers – Page 47
<input type="checkbox"/>	Export Common Transfer Files ➤ Routines>Data Out>CTF>Export CTF – Page 49
<input type="checkbox"/>	Set up the promotion mapping for the new academic year ➤ Routines>School>Promotion – Page 52
<input type="checkbox"/>	Change the status of applications ➤ Routines>Admission>Accept Applicants – Page 61
<input type="checkbox"/>	Allocate applicants to registration group/classes ➤ Focus>School>Pastoral structure>Next Academic Year Structure – Page 65
<input type="checkbox"/>	Print class/registration group lists for the new academic year ➤ Reports>Run Report>Select Students>Registration Groups (Dated)>select date first day in new Academic Year – Page 67
<input type="checkbox"/>	Enter reasons for absence last year ➤ Focus>Attendance>Edit Marks – Page 70
<input type="checkbox"/>	Map meal charges ➤ Tools>Dinner Money>Pupil Meal Definitions – Page 72



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Routines for After the New Academic Year Has Started:

Complete	Description/Task
<input type="checkbox"/>	Admit applicants ➤ Routines>Admission>Admit Applications – Page 73
<input type="checkbox"/>	Re-admit pupils ➤ Focus>Pupil>Pupil Details>Click New – Page 76
<input type="checkbox"/>	Print the official register for September ➤ Reports>Attendance>Whole Group Pupil Reports>Official Register Report>enter dates in the New Academic Year – Page 77
<input type="checkbox"/>	Add 'Not Required' codes (If required for Nursery) ➤ Tools>Setups>Attendance Setup>Part Time Pupils – Page 77
<input type="checkbox"/>	Run housekeeping routines ➤ See SIMS Housekeeping - PENNINE EDUCATION LTD

Please visit our Website:

[SIMS End of Year - PENNINE EDUCATION LTD](#)

For all guidance on EOY procedures

We would like to remind you of the services we are offering to help complete your new school year setup:

Details of the services on offer -

- New School Year Overview 2-hour session - costing £60.00.
- Managed service where Pennine Education will complete the New School Year Setup for you with the information provided by yourself at a cost of £160.00.

For further assistance please log a ticket with us via

support@pennineeducation.co.uk

Or call us on
[0161 509 2900](tel:01615092900)