



SIMS



SIMS Primary School Yearbook

2023/2024

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Disclaimer: The SIMS Yearbook provides a list of suggested tasks that can be carried out during the course of the academic year. Please note that the tasks and their timings are likely to vary according to the specific requirements of each school. The dates contained in this document are defined by the applicable educational body and are subject to change.

September

Core Data	<p>Admit new pupils when they physically arrive at the school.</p> <p>Allocate UPNs to any new pupils who have never previously had a UPN.</p> <p>Use Data Collection Sheets to ensure all data is up to date.</p> <p>To help track Children Missing in Education, create CMJ files for new pupils, then send the files to the Local Authority (England only).</p>
Statutory Returns	<p>Ensure all pupil data is up to date using bulk update, in readiness for the returns.</p> <p>Schools taking part in the School Workforce/School Workforce Annual Census should use Personnel to enter details of staff for whom data will be reported (England and Wales only).</p> <p>Carry out dry runs of the applicable returns:</p> <ul style="list-style-type: none">▪ School Census Autumn Return (England only)▪ DENI Main Return (Northern Ireland only). <p>Note: The Attendance Collection has been cancelled (Wales only).</p>
Attendance	<p>Store an electronic copy of the Official Register for last month.</p>
Lesson Monitor	<p>Check memberships of registration groups/lessons for the start of term.</p> <p>Set up patterns of registration to periods via Tools Setups Lesson Monitor Options Lesson Monitor Setup.</p>
Assessment	<p>Review staff permissions and prepare marksheets.</p> <p>Baseline pupil performance and record outcomes in SIMS.</p>
Profiles	<p>Review the previous year's reporting sessions.</p> <p>Edit and enter new comments into comment banks.</p> <p>Set up new sessions for each year group throughout the year.</p>
FMS	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reforecast budget, if required.</p>
Personnel and Staff Performance	<p>Maintain staff records. Ensure that teacher service terms are up to date.</p> <p>Add a Start Date into the contract for any members of staff joining in this academic year.</p> <p>Set up the line management structure.</p> <p>Record any new school objectives or professional standards.</p> <p>Record any new staff objectives.</p>
Dinner Money	<p>If your catering year begins in September, check that a new catering year has been created via Tools Dinner Money Setup.</p> <p>Ensure that Dinner Money meal definitions have been updated with any price changes before recording meals. Meal definition changes can be backdated using Tools Dinner Money Backdate Meal Processing.</p> <p>Review default meal pattern for all pupils.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>

October

Core Data	Create intake/admission groups for the following academic year. Own Admission Authority schools should import ADT files.
Statutory Returns	Use SIMS to produce and submit the applicable returns: <ul style="list-style-type: none">▪ School Census Autumn Return (England only)▪ DENI Main Return (Northern Ireland only). Carry out dry runs of the applicable returns: <ul style="list-style-type: none">▪ School Workforce Census (England only).▪ School Workforce Annual Census (Wales only).
Attendance	Store an electronic copy of the Official Register for last month.
Lesson Monitor	No specific tasks for this month.
Assessment	Read Assessment and Reporting Arrangements, which outline statutory assessment requirements for this academic year. These are published by local government departments in England, Wales and Northern Ireland to their respective websites.
Profiles	First instalment of the Autumn Package published (DfE).
FMS	Review/monitor budget for the current year. Check salary projections against actual salaries and for variations on salaries. Check for any outstanding commitment for the month. Reforecast budget, if required.
Personnel and Staff Performance	Maintain staff records.
Dinner Money	Produce appropriate letters for pupils with outstanding balances. Produce and submit Local Authority Catering Returns.

November

Core Data	Own Admission Authority schools should enter data for an ASL file.
Statutory Returns	Use SIMS to produce and submit the applicable returns: <ul style="list-style-type: none">▪ School Workforce Census (England only)▪ School Workforce Annual Census (Wales only).
Attendance	Store an electronic copy of the Official Register for last month.
Lesson Monitor	No specific tasks for this month.
Assessment	Analyse pupils' Key Stage results against national data from analysis reports that you can generate in SIMS. Carry out pupil attainment and progress reviews. Send interim pupil reports home to parents and carers.
Profiles	Work on the Autumn Package.
FMS	Review/monitor budget for the current year. Check salary projections against actual salaries and for variations on salaries. Check for any outstanding commitment for the month. Prepare reports for Governors. Reforecast budget, if required.
Personnel and Staff Performance	Maintain staff records.
Dinner Money	Produce appropriate letters for pupils with outstanding balances. Produce and submit Local Authority Catering Returns.

December

Core Data	<p>Own Admission Authority schools should export an ASL file to their Local Authority (LA).</p> <p>Prepare for next year's new intake – create admission groups.</p>
Statutory Returns	<p>Ensure all pupil data is up to date using bulk update.</p> <p>Carry out dry runs of the applicable returns:</p> <ul style="list-style-type: none"> ▪ School Census Spring Return (England only) ▪ CES Census (England and Wales only) ▪ PLASC Return (Wales only).
Attendance	<p>Complete a Registration Certificate for pupils.</p> <p>Store an electronic copy of the Official Register for last month.</p> <p>Run the Persistent Absence report for terms 1 and 2 via Reports Attendance Whole Group Pupil Reports Persistent Absence Reports.</p>
Lesson Monitor	<p>No specific tasks for this month.</p>
Assessment	<p>View Primary performance tables published by the DfE (https://www.compare-school-performance.service.gov.uk).</p>
Profiles	<p>No specific tasks for this month.</p>
FMS	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reforecast budget, if required.</p>
Personnel and Staff Performance	<p>Add new members of staff for the Spring term.</p> <p>Maintain staff records.</p> <p>Review first term staff objectives.</p>
Dinner Money	<p>If your Catering Year starts in January, create a new Catering Year in Dinner Money.</p> <p>Ensure that Dinner Money meal definitions have been updated with any price changes, before recording meals. Meal definition changes can be backdated using Tools Dinner Money Backdate Meal Processing.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>

January

Core Data	Create the new academic year for the following September.
Statutory Returns	Use SIMS to produce and submit the applicable returns: <ul style="list-style-type: none">▪ School Census Spring Return (England only)▪ CES Census (England and Wales)▪ PLASC Return (Wales only).
Attendance	School Census – run the Student Analysis by Attendance Category report to check the return figures (England only). Print a Registration Certificate for pupils. Store an electronic copy of the Official Register for last month.
Lesson Monitor	No specific tasks for this month.
Assessment	No specific tasks for this month.
Profiles	Complete a reporting session for each year group and send reports home.
FMS	Review/monitor budget for the current year. Check salary projections against actual salaries and for variations on salaries. Check for any outstanding commitment for the month. Update Pay Scales and National Insurance contributions in Personnel.
Personnel and Staff Performance	Maintain staff records.
Dinner Money	Review default meal pattern for all pupils. Produce appropriate letters for pupils with outstanding balances. Produce and submit Local Authority Catering Returns.

February

Core Data	No specific tasks for this month.
Statutory Returns	No specific tasks for this month.
Attendance	Store an electronic copy of the Official Register for last month.
Lesson Monitor	No specific tasks for this month.
Assessment	No specific tasks for this month.
Profiles	No specific tasks for this month.
FMS	Review/monitor budget for the current year. Check salary projections against actual salaries and for variations on salaries. Check for any outstanding commitment for the month. Prepare reports for Governors. Review next year's budget scenarios.
Personnel and Staff Performance	Review contracts for staff and award appropriate increments. Maintain staff records.
Dinner Money	Produce appropriate letters for pupils with outstanding balances. Produce and submit Local Authority Catering Returns.

March

Core Data	Import any ATF file sent by your LA.
Statutory Returns	Prepare for End of Key Stage returns. Carry out Key Stage registration (NI schools only).
Attendance	Print a Registration Certificate for pupil. Store an electronic copy of the Official Register for last month.
Lesson Monitor	No specific tasks for this month.
Assessment	Collect and review school's internal assessments.
Profiles	Complete a Reporting Session for each year group and send reports home.
FMS	Review/monitor budget for the current year. Check salary projections against actual salaries and for variations on salaries. Check for any outstanding commitment for the month. Agree budget with Governors and submit to the Local Authority (LA). Open new financial year. Prepare to close the old financial year.
Personnel and Staff Performance	Enter New Pay Awards for Service Terms and the National Insurance Table. Add new members of staff for Summer term. Maintain staff records.
Dinner Money	If your Catering Year starts in April, create a new Catering Year for this year and next year in Dinner Money Setup. Ensure that Dinner Money meal definitions have been updated with any price changes before recording meals. Meal definition changes can be backdated using Tools Dinner Money Backdate Meal Processing . Produce appropriate letters for pupils with outstanding balances. Produce and submit Local Authority Catering Returns.

April

Core Data	Update data on applicants during the Summer term. Allocate applicants to admission groups.
Statutory Returns	Ensure all pupil data is up to date for returns using bulk update. Carry out dry runs of the School Census Summer Return (England only).
Attendance	Store an electronic copy of the Official Register for last month. Run the Persistent Absence report to view the progression of poorly attending pupils across terms 1 to 4.
Lesson Monitor	No specific tasks for this month.
Assessment	Import statutory assessment Key Stage Wizards for the current year in SIMS. Carry out pupil attainment and progress reviews. Analyse the school's internal results and send interim pupil reports home to parents and carers.
Profiles	No specific tasks for this month.
FMS	Review/monitor budget for the current year. Check salary projections against actual salaries and for variations on salaries. Check for any outstanding commitment for the month. Prepare to complete the Consistent Financial Reporting Return (CFR).
Personnel and Staff Performance	Maintain staff records. Review staff objectives for the Spring term.
Dinner Money	Review default meal pattern for all pupils. Produce appropriate letters for pupils with outstanding balances. Produce and submit Local Authority Catering Returns.

May

Core Data	<p>Begin your end of year procedures (<i>the End of Year Procedure handbooks are available from the Home page of the SIMS Documentation Centre, accessed by clicking the Documentation button on the SIMS Home Page</i>).</p> <p>Accept applicants as details are received.</p>
Statutory Returns	<p>Enter TAs into the relevant Key Stage Wizard.</p> <p>Ensure all pupil data is up to date using bulk update in readiness for the returns.</p> <p>Use SIMS to produce and submit the School Census Summer Return (England only).</p> <p>Carry out dry runs of the Attendance Collection Return (Wales only).</p> <p>Export KS TAs (Northern Ireland only).</p>
Attendance	<p>Print a Registration Certificate for pupils.</p> <p>Store an electronic copy of the Official Register for last month.</p>
Lesson Monitor	<p>No specific tasks for this month.</p>
Assessment	<p>Enter statutory assessment results into relevant Key Stage Wizards.</p>
Profiles	<p>Complete a Reporting Session for each year group and send reports home.</p>
FMS	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reconcile old year accounts with external bodies (bank and Local Authority).</p> <p>Prepare to complete the CFR Return.</p>
Personnel and Staff Performance	<p>Maintain staff records.</p>
Dinner Money	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>

June

Core Data	<p>Record leavers.</p> <p>Run promotion routines and check results (<i>the End of Year Procedure handbooks are available from the Home page of the SIMS Documentation Centre, accessed by clicking the Documentation button on the SIMS Home Page</i>).</p> <p>Allocate applicants to registration groups for the new academic year.</p>
Statutory Returns	<p>Ensure all pupil data is up to date using bulk update.</p> <p>Export KS1 TAs (and P Scales) to Local Authority (England and Wales).</p> <p>Export FSP data to Local Authority (England only).</p> <p>Marked KS scripts returned. Enter results into SIMS Assessment.</p>
Attendance	<p>Allocate applicants to registration groups for the new academic year.</p> <p>Store an electronic copy of the Official Register for last month.</p>
Lesson Monitor	<p>No specific tasks for this month.</p>
Assessment	<p>Enter statutory assessment results into relevant Key Stage Wizards.</p>
Profiles	<p>No specific tasks for this month.</p>
FMS	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Close the old financial year.</p> <p>Complete and submit the CFR Return in line with the LA CFR submission date.</p> <p>Prepare reports for Governors.</p>
Personnel and Staff Performance	<p>Maintain staff records.</p> <p>Review all yearly staff objectives and associated CPD and observation records.</p>
Dinner Money	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>

July

Core Data	<p>Import CTF files from feeder schools.</p> <p>Create CTF files for leavers.</p> <p>To help track Children Missing in Education, create CML files for leavers, then send the files to the Local Authority (England only).</p> <p>Print registration group lists for the new term.</p>
Statutory Returns	<p>Export KS TAs to NAA (England) or WJEC (Wales).</p>
Attendance	<p>Print a Registration Certificate for pupils.</p> <p>Store an electronic copy of the Official Register for last month.</p> <p>Run a Persistent Absence report for the entire academic year.</p>
Lesson Monitor	<p>No specific tasks for this month.</p>
Assessment	<p>Read the DfE's statement of intent (Key Stage 2) available on the Government website (https://www.gov.uk/government/publications/school-and-college-performance-tables-statements-of-intent).</p> <p>Carry out pupil attainment and progress reviews.</p> <p>Send full annual pupil reports home to parents and carers.</p>
Profiles	<p>Complete a Reporting Session for each year group and send reports home.</p>
FMS	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p>
Personnel and Staff Performance	<p>Maintain staff records.</p> <p>Terminate any contracts that expire at the end of the academic year.</p> <p>Create staff objectives for the next academic year.</p>
Dinner Money	<p>If your Catering Year starts in September, create a new Catering Year for this year and next year in Dinner Money Setup.</p> <p>Update meal definitions if notified of any price changes for September.</p> <p>Reconcile pupil balances.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p> <p>Retrieve outstanding debts for staff and pupils, in particular any leaving the school.</p> <p>Repay any outstanding refunds.</p>

August

Core Data	Consider running various housekeeping routines, i.e. Address Validation, merging agents and agencies, merging addresses, merging contacts, deleting pupils, etc.
Statutory Returns	<p>Ensure all pupil data is up to date using bulk update, in readiness for the returns.</p> <p>Schools taking part in the School Workforce Census should use Personnel to enter details of staff for whom data will be reported (England only).</p> <p>Carry out dry runs of the Attendance Collection Return (Wales only). Ensure that the forthcoming academic year has been defined before carrying out the dry run.</p>
Attendance	<p>Print out the OMR forms for the beginning of the new academic year to ensure that they are ready for the first day. The promotion and admissions processes must have been performed before printing OMR forms to ensure that the pupils are in the correct registration groups.</p> <p>DENI Main Return – Run the Group Analysis by Category report to check the DENI Return figures (Northern Ireland only).</p> <p>Store an electronic copy of the Official Register for last month.</p>
Lesson Monitor	No specific tasks for this month.
Assessment	Import Welsh Baseline Assessment resources for the current year in SIMS (Wales only).
Profiles	No specific tasks for this month.
FMS	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p>
Personnel and Staff Performance	<p>Add new members of staff for Autumn term.</p> <p>Maintain staff records.</p> <p>Design and run a report to view which members of staff have been recommended for a salary increase.</p> <p>Review contracts for staff and award appropriate increments.</p>
Dinner Money	Ensure that Dinner Money meal definitions have been updated with any price change before recording meals.
Parent/Student App	<p>It is recommended that the following actions are taken over the Summer holidays:</p> <ul style="list-style-type: none"> ▪ Unregister staff members and students who are leaving the school. ▪ Unregister parents of students who are leaving the school (except parents who have other children remaining in the school). <p>Schools can invite users at any point in the year. However, it is recommended that the following actions are taken over the summer holidays or early in the academic year:</p> <ul style="list-style-type: none"> ▪ Invite staff members and students joining the school. ▪ Invite parents of students joining the school (except parents who have other children in the school already).

Core Data

A variety of documentation (handbooks tutorials, quick reference sheets, etc.) are available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	<p>Admit new pupils when they physically arrive at the school.</p> <p>Allocate UPNs to any new pupils who have never previously had a UPN.</p> <p>Use Data Collection Sheets to ensure all data is up to date.</p> <p>To help track Children Missing in Education, create CMJ files for new pupils, then send the files to the Local Authority (England only).</p>
Oct	<p>Create intake/admission groups for the following academic year.</p> <p>Own Admission Authority schools should import ADT files.</p>
Nov	<p>Own Admission Authority schools should enter data for an ASL file.</p>
Dec	<p>Own Admission Authority schools should export an ASL file to their Local Authority (LA).</p> <p>Prepare for next year's new intake – create admission groups.</p>
Jan	<p>Create the new academic year for the following September.</p>
Feb	<p>No specific tasks for this month.</p>
Mar	<p>Import any ATF file sent by your LA.</p>
Apr	<p>Update data on applicants during the Summer term.</p> <p>Allocate applicants to admission groups.</p>
May	<p>Begin your end of year procedures (<i>the End of Year Procedure handbooks are available from the Home page of the SIMS Documentation Centre, accessed by clicking the Documentation button on the SIMS Home Page</i>).</p> <p>Accept applicants as details are received.</p>
Jun	<p>Record leavers.</p> <p>Run promotion routines and check results (<i>the End of Year Procedure handbooks are available from the Home page of the SIMS Documentation Centre, accessed by clicking the Documentation button on the SIMS Home Page</i>).</p> <p>Allocate applicants to registration groups for the new academic year.</p>
Jul	<p>Import CTF files from feeder schools.</p> <p>Create CTF files for leavers.</p> <p>To help track Children Missing in Education, create CML files for leavers, then send the files to the Local Authority (England only).</p> <p>Print Registration group lists for the new term.</p>
Aug	<p>Consider running various housekeeping routines, i.e. Address Validation, merging agents and agencies, merging addresses, merging contacts, deleting pupils, etc.</p>

Statutory Returns

Detailed information about the statutory return process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	<p>Ensure all pupil data is up to date using bulk update, in readiness for the returns.</p> <p>Schools taking part in the School Workforce/School Workforce Annual Census should use Personnel to enter details of staff for whom data will be reported (England and Wales only).</p> <p>Carry out dry runs of the applicable returns:</p> <ul style="list-style-type: none">▪ School Census Autumn Return (England only)▪ DENI Main Return (Northern Ireland only). <p><i>Note: The Attendance Collection has been cancelled (Wales only).</i></p>
Oct	<p>Use SIMS to produce and submit the applicable returns:</p> <ul style="list-style-type: none">▪ School Census Autumn Return (England only)▪ DENI Main Return (Northern Ireland only). <p>Carry out dry runs of the applicable returns:</p> <ul style="list-style-type: none">▪ School Workforce Census (England only)▪ School Workforce Annual Census (Wales only).
Nov	<p>Use SIMS to produce and submit the applicable returns:</p> <ul style="list-style-type: none">▪ School Workforce Census (England only)▪ School Workforce Annual Census (Wales only).
Dec	<p>Ensure all pupil data is up to date using bulk update.</p> <p>Carry out dry runs of the applicable returns:</p> <ul style="list-style-type: none">▪ School Census Spring Return (England only)▪ CES Census (England and Wales only)▪ PLASC Return (Wales only).
Jan	<p>Use SIMS to produce and submit the applicable returns:</p> <ul style="list-style-type: none">▪ School Census Spring Return (England only)▪ CES Census (England and Wales)▪ PLASC Return (Wales only).
Feb	<p>No specific tasks for this month.</p>
Mar	<p>Prepare for End of Key Stage returns.</p> <p>Carry out Key Stage registration (NI schools only).</p>
Apr	<p>Ensure all pupil data is up to date for returns using bulk update.</p> <p>Carry out dry runs of the School Census Summer Return (England only).</p>

Statutory Returns

Detailed information about the statutory return process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

May	<p>Enter TAs into the relevant Key Stage Wizard.</p> <p>Ensure all pupil data is up to date using bulk update in readiness for the returns.</p> <p>Use SIMS to produce and submit the School Census Summer Return (England only).</p> <p>Export KS TAs (Northern Ireland schools only in May).</p>
Jun	<p>Ensure all pupil data is up to date using bulk update.</p> <p>Export KS1 TAs (and P Scales) to Local Authority (England and Wales).</p> <p>Export FSP data to Local Authority (England only).</p> <p>Marked KS scripts returned. Enter results into SIMS Assessment.</p>
Jul	<p>Export KS TAs to NAA (England) or WJEC (Wales).</p>
Aug	<p>Ensure all pupil data is up to date using bulk update, in readiness for the returns.</p> <p>Schools taking part in the School Workforce Census should use Personnel to enter details of staff for whom data will be reported (England only).</p> <p>Carry out dry runs of the Attendance Collection Return (Wales only). Ensure that the forthcoming academic year has been defined before carrying out the dry run.</p>

Attendance

Detailed information about the attendance process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	Store an electronic copy of the Official Register for last month
Oct	Store an electronic copy of the Official Register for last month.
Nov	Store an electronic copy of the Official Register for last month.
Dec	Complete a Registration Certificate for pupils. Store an electronic copy of the Official Register for last month. Run the Persistent Absence report for terms 1 and 2 via Reports Attendance Whole Group Pupil Reports Persistent Absence Reports .
Jan	School Census – run the Student Analysis by Attendance Category report to check the return figures (England only). Print a Registration Certificate for pupils. Store an electronic copy of the Official Register for last month.
Feb	Store an electronic copy of the Official Register for last month.
Mar	Print a Registration Certificate for pupil. Store an electronic copy of the Official Register for last month.
Apr	Store an electronic copy of the Official Register for last month. Run the Persistent Absence report to view the progression of poorly attending pupils across terms 1 to 4.
May	Print a Registration Certificate for pupils. Store an electronic copy of the Official Register for last month.
Jun	Allocate applicants to registration groups for the new academic year. Store an electronic copy of the Official Register for last month.
Jul	Print a Registration Certificate for pupils. Store an electronic copy of the Official Register for last month. Run a Persistent Absence report for the entire academic year.
Aug	Print out the OMR forms for the beginning of the new academic year to ensure that they are ready for the first day. The promotion and admissions processes must have been performed before printing OMR forms to ensure that the pupils are in the correct registration groups. DENI Return - Run the Group Analysis report by Category report to check the DENI Return figures (Northern Ireland only). Store an electronic copy of the Official Register for last month.

Lesson Monitor

Detailed information about the Lesson Monitor process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	Check memberships of registration group/lessons for start of term. Set up patterns of registration to periods via Tools Setups Lesson Monitor Options Lesson Monitor Setup .
Oct	No specific tasks for this month.
Nov	No specific tasks for this month.
Dec	No specific tasks for this month.
Jan	No specific tasks for this month.
Feb	No specific tasks for this month.
Mar	No specific tasks for this month.
Apr	No specific tasks for this month.
May	No specific tasks for this month.
Jun	No specific tasks for this month.
Jul	No specific tasks for this month.
Aug	No specific tasks for this month.

Assessment

Detailed information about the assessment process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	Review staff permissions and prepare marksheets. Baseline pupil performance and record outcomes in SIMS.
Oct	Read Assessment and Reporting Arrangements, which outline statutory assessment requirements for this academic year. These are published by local government departments in England, Wales and Northern Ireland to their respective websites.
Nov	Analyse pupils' Key Stage results against national data from analysis reports that you can generate in SIMS. Carry out pupil attainment and progress reviews. Send interim pupil reports home to parents and carers.
Dec	View Primary performance tables published by the DfE (https://www.compare-school-performance.service.gov.uk).
Jan	No specific tasks for this month.
Feb	No specific tasks for this month.
Mar	Collect and review school's internal assessments.
Apr	Import statutory assessment Key Stage Wizards for the current year in SIMS. Carry out pupil attainment and progress reviews. Analyse the school's internal results and send interim pupil reports home to parents and carers.
May	Enter statutory assessment results into relevant Key Stage Wizards.
Jun	Enter statutory assessment results into relevant Key Stage Wizards.
Jul	Read the DfE's statement of intent (Key Stage 2) available on the Government website (https://www.gov.uk/government/publications/school-and-college-performance-tables-statements-of-intent). Carry out pupil attainment and progress reviews. Send full annual pupil reports home to parents and carers.
Aug	Import Welsh Baseline Assessment resources for the current year in SIMS (Wales only).

Profiles

Detailed information about the profiles process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	Review the previous year's reporting sessions. Edit and enter new comments into comment banks. Set up new sessions for each year group throughout the year.
Oct	First instalment of the Autumn Package published (DfE).
Nov	Work on the Autumn Package.
Dec	Complete a Reporting Session for each year group and send reports home.
Jan	Complete a Reporting Session for each year group and send reports home.
Feb	No specific tasks for this month.
Mar	Complete a Reporting Session for each year group and send reports home.
Apr	No specific tasks for this month.
May	Complete a Reporting Session for each year group and send reports home.
Jun	No specific tasks for this month.
Jul	Complete a Reporting Session for each year group and send reports home.
Aug	No specific tasks for this month.

FMS

For more information, refer to the applicable Finance handbook. All handbooks can be accessed from the FMS **Documentation Centre** which is launched from FMS by selecting **Help | FMS Documentation**. Once open, click the **Handbooks** link and select the required handbook.

Sep	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reforecast budget, if required.</p>
Oct	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reforecast budget, if required.</p>
Nov	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Prepare reports for Governors.</p> <p>Reforecast budget, if required.</p>
Dec	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reforecast budget, if required.</p>
Jan	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Update Pay Scales and National Insurance contributions in Personnel.</p>
Feb	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Prepare reports for Governors.</p> <p>Review next year's budget scenarios.</p>
Mar	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Agree budget with Governors and submit to the Local Authority (LA).</p> <p>Open new financial year.</p> <p>Prepare to close the old financial year.</p>

FMS

For more information, refer to the applicable Finance handbook. All handbooks can be accessed from the FMS **Documentation Centre** which is launched from FMS by selecting **Help | FMS Documentation**. Once open, click the **Handbooks** link and select the required handbook.

Apr	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Prepare to complete the Consistent Financial Reporting Return (CFR).</p>
May	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Reconcile old year accounts with external bodies (bank and Local Authority).</p> <p>Prepare to complete the CFR Return.</p>
Jun	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p> <p>Close the old financial year.</p> <p>Complete and submit the CFR Return in line with the LA CFR submission date.</p> <p>Prepare reports for Governors.</p>
Jul	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p>
Aug	<p>Review/monitor budget for the current year.</p> <p>Check salary projections against actual salaries and for variations on salaries.</p> <p>Check for any outstanding commitment for the month.</p>

Personnel and Staff Performance

Detailed information about the personnel process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	Maintain staff records. Add a Start Date into the contract for any members of staff joining in this academic year. Ensure that teacher service terms are up to date. Set up the line management structure. Record any new school objectives or professional standards. Record any new staff objectives.
Oct	Maintain staff records.
Nov	Maintain staff records.
Dec	Add new members of staff for the Spring term. Maintain staff records. Review first term staff objectives.
Jan 23	Maintain staff records.
Feb	Review contracts for staff and award appropriate increments. Maintain staff records.
Mar	Enter New Pay Awards for Service Terms and the National Insurance Table. Add new members of staff for the Summer term. Maintain staff records.
Apr	Maintain staff records. Review staff objectives for the Spring term.
May	Maintain staff records.
Jun	Maintain staff records. Review all yearly staff objectives and associated CPD and observation records.
Jul	Maintain staff records. Terminate any contracts that expire at the end of the academic year. Create staff objectives for the next academic year.
Aug	Add new members of staff for the Autumn term. Maintain staff records. Run a report to view which members of staff have been recommended for a salary increase. Review contracts for staff and award appropriate increments.

Dinner Money

Detailed information about the Dinner Money process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Sep	<p>If your catering year begins in September, check that a new catering year has been created via Tools Dinner Money Setup.</p> <p>Ensure that Dinner Money Meal Definitions have been updated with any price changes before recording meals. Meal Definition changes can be backdated using Tools Dinner Money Backdate Meal Processing.</p> <p>Review Default Meal Pattern for all pupils.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Oct	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Nov	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Dec	<p>If your Catering Year starts in January, create a new Catering Year in Dinner Money.</p> <p>Ensure that Dinner Money Meal Definitions have been updated with any price changes, before recording meals. Meal Definition changes can be backdated using Tools Dinner Money Backdate Meal Processing.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Jan	<p>Review Default Meal Pattern for all pupils.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Feb	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Mar	<p>If your Catering Year starts in April, create a new Catering Year for this year into next year in Dinner Money Setup.</p> <p>Ensure that Dinner Money Meal Definitions have been updated with any price changes before recording meals. Meal Definition changes can be backdated using Tools Dinner Money Backdate Meal Processing.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Apr	<p>Review Default Meal Pattern for all pupils.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
May	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>

Dinner Money

Detailed information about the Dinner Money process in SIMS is available from the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Jun	<p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p>
Jul	<p>If your Catering Year starts in September, create a new Catering Year for this year and into next year in Dinner Money Setup.</p> <p>Update Meal Definitions if notified of any price changes for September</p> <p>Reconcile pupil balances.</p> <p>Produce appropriate letters for pupils with outstanding balances.</p> <p>Produce and submit Local Authority Catering Returns.</p> <p>Retrieve outstanding debts for staff and pupils, in particular any leaving the school.</p> <p>Repay any outstanding refunds.</p>
Aug	<p>Ensure that Dinner Money Meal Definitions have been updated with any price change before recording meals. Meal Definition changes can be backdated using Tools Dinner Money Backdate Meal Processing.</p>

Parent/Student App

Detailed information about the Parent/Student App process is available via the SIMS **Documentation Centre**, which is launched by clicking the **Documentation** button on the top right-hand side of the SIMS **Home Page**.

Select **Other Products | SIMS Parent** or **SIMS Student** to launch the applicable documentation centre.

Aug

It is recommended that the following actions are taken over the Summer holidays:

- Unregister staff members and students who are leaving the school.
- Unregister parents of students who are leaving the school (except parents who have other children remaining in the school).

Schools can invite users at any point in the year. However, it is recommended that the following actions are taken over the summer holidays or early in the academic year:

- Invite staff members and students joining the school.
- Invite parents of students joining the school (except parents who have other children in the school already).