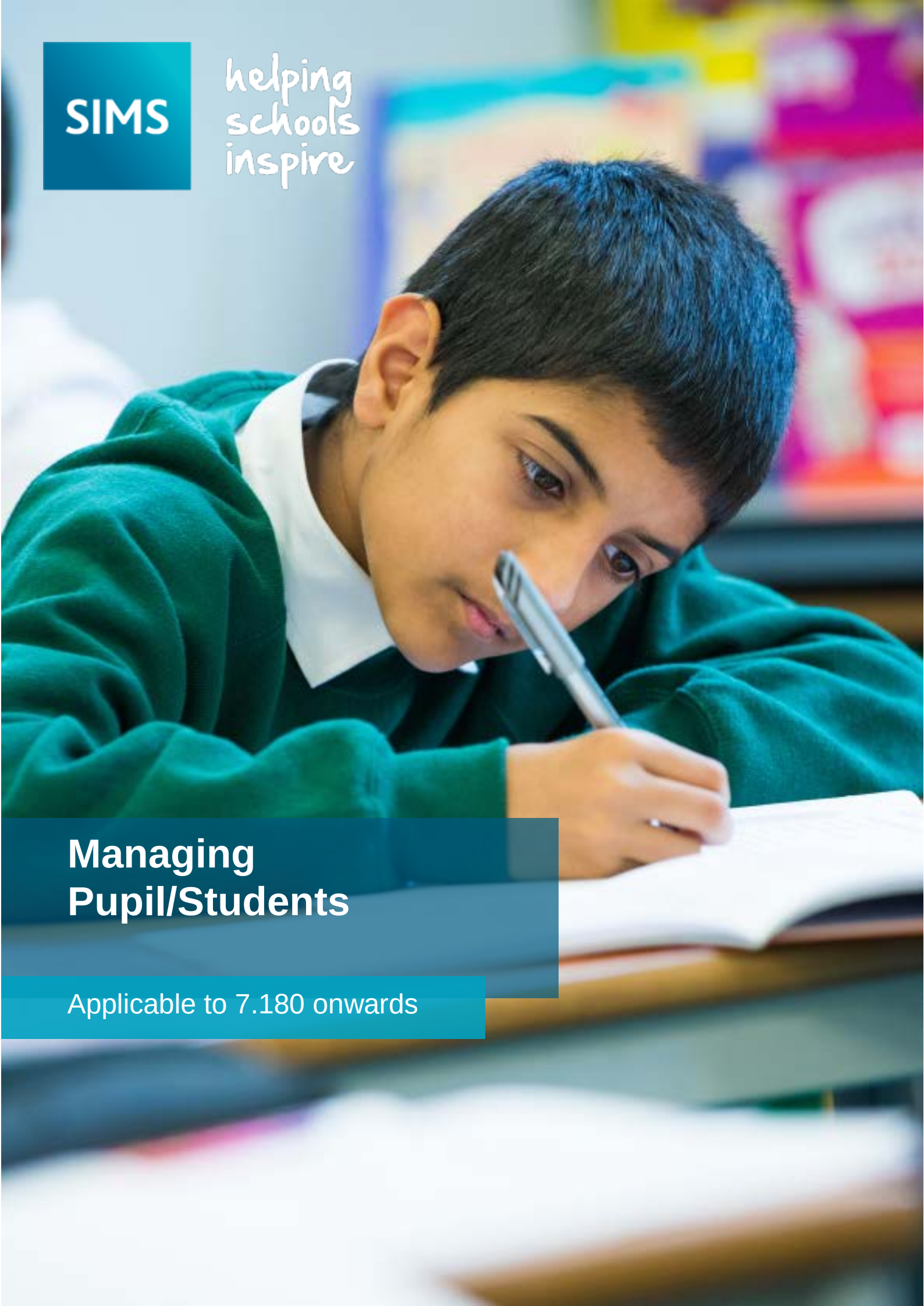




SIMS

helping
schools
inspire



Managing Pupil/Students

Applicable to 7.180 onwards

Revision History

Version	Change Description	Date
7.180 - 1.0	Initial release.	02/03/2018

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Capita Doc Ref: Students7180/HBK/020318/DB

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Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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Maintaining Pupil/Student Data

This handbook provides information on the main processes that relate to the management of pupil/student data in SIMS, from admission through to leaving. It also covers some of the typical day-to-day processes that are carried out in SIMS.

This handbook assumes that various defaults and setups have been previously carried out. Where necessary, references are made to the *Setting Up and Administering SIMS* handbook, which describes how to set up SIMS for the functions outlined in this handbook.

What's New in this Release?

The following changes have been made in this release.

Changes to Enrolment Status Functionality

Focus | Pupil (or Student) | Pupil (or Student) Details Routines | Pupil (or Student) | Change Enrolment Status

The **Enrolment Status** field in the **Registration** panel on the pupil/student record is now read-only (unless a new record is being created).

It is now possible to make changes to the **Enrolment Status** on the **Change Enrolment Status** page only, where the **Student Date of Change** and **Notes** fields have been added to the **Registration** panel.

The enrolment status changes can now be viewed on the pupil/student record by clicking the adjacent **Browser** button to display the **Enrolment Status Changes** dialog.

For Pupil Referral Units in England, the **FE College** and **Other Provider** options have also been added to various **Enrolment Status** drop-down lists.



More Information:

Adding/Editing Registration Information on page 175

Changing the Enrolment Status on page 182

Enhancements to Bulk Update

Routines | Pupil (or Student) | Bulk Update

It is now possible to bulk update User Defined Fields that are **True/False** or **Lookup** (as defined in **Tools | Setups | User Defined Fields**) by selecting from the **Data Item** drop-down list. User Defined Fields are listed as **UDF - <UDF name>**.

It is now possible to export the **Bulk Update** table to Microsoft® Excel using the **Print** button.

The **Effective Date** field is now disabled for non-dated data items (e.g. **Birth Certificate Seen, Country of Birth**, etc.).



More Information:

Choosing the Records to Bulk Update on page 250

Addition of the Communicator Field

Focus | Pupil (or Student) | Pupil (or Student) Details - Communication Log link in the Links panel **The Communication Log is not applicable to schools in Northern Ireland**

Focus | Admission | Application - Communications panel

Focus | Communication - Basic Details panel

Reports | Design Reports - Focus | Communication

The **Communicator** field has been added to various areas of SIMS, enabling schools to record which members of staff have dealt with communications. This field has also been added to the reporting dictionary.

Re-Allocating a UPN

Focus | Pupil (or Student) | Pupil (or Student) Details

Focus | Admission | Application

It is now possible to re-allocate a UPN from within the pupil/student and applicant records. This functionality was previously available only on request.

Addition of a Warning Message when Editing the Admission Date

Focus | Pupil (or Student) | Pupil (or Student) Details

To help avoid re-admission procedures being carried out inadvertently via the incorrect menu route, a warning message is now displayed when saving the pupil/student record if the **Admission Date** in the **Registration** panel is changed.

Addition of a Warning Message when Adding or Editing the Date of Leaving

Focus | Pupil (or Student) | Pupil (or Student) Details

Routines | Pupil (or Student) | Leavers

By default, a warning message is now displayed on saving if the **Date of Leaving** is changed to more than 14 days in the past. It is possible to hide the message or edit the default number of 14 days via **Tools | Setups | School Options**.

Addition of a Confirmation Message when Adding a Contact

Focus | Pupil (or Student) | Pupil (or Student) Details
Focus | Admission | Application

A confirmation message is now displayed when attempting to record the selected pupil/student as their own contact in the **Family/Home** panel.

Enhancement to CTF Import

Applicable to schools in Northern Ireland only

Routines | Data In | CTF | Import CTF

Pupil/students who are imported in a CTF without ethnicity information are now assigned the ethnicity code **UNC** (No Ethnicity Recorded) by default instead of **NOBT** (Information Not Obtained).

Permissions

You will need to be a member of one or more of the following System Manager user groups to ensure you have the permissions required to use the functionality outlined in this handbook.

- Administration Assistant
- Admissions Officer
- Assessment Coordinator
- Assessment Operator
- Attendance Manager
- Attendance Operator
- Class Teacher
- Curricular Manager
- Pastoral Manager
- Registration Tutor
- Returns Manager
- Returns Operator
- School Administrator
- SEN Co-ordinator
- Senior Management Team
- Teaching Assistant

Please contact your System Administrator if you are unsure whether you have the applicable permissions.



Additional Resources:

Managing SIMS Users, Groups and Databases handbook

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category, then click the required handbook from the **Handbooks** page.

For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet. Copies can be obtained via the **SIMS Documentation Centre** and from My Account (<https://myaccount.capita-cs.co.uk>). On My Account, search for <sims version> sims permissions spreadsheet, e.g. 7.180 sims permissions spreadsheet.

Recording People in SIMS

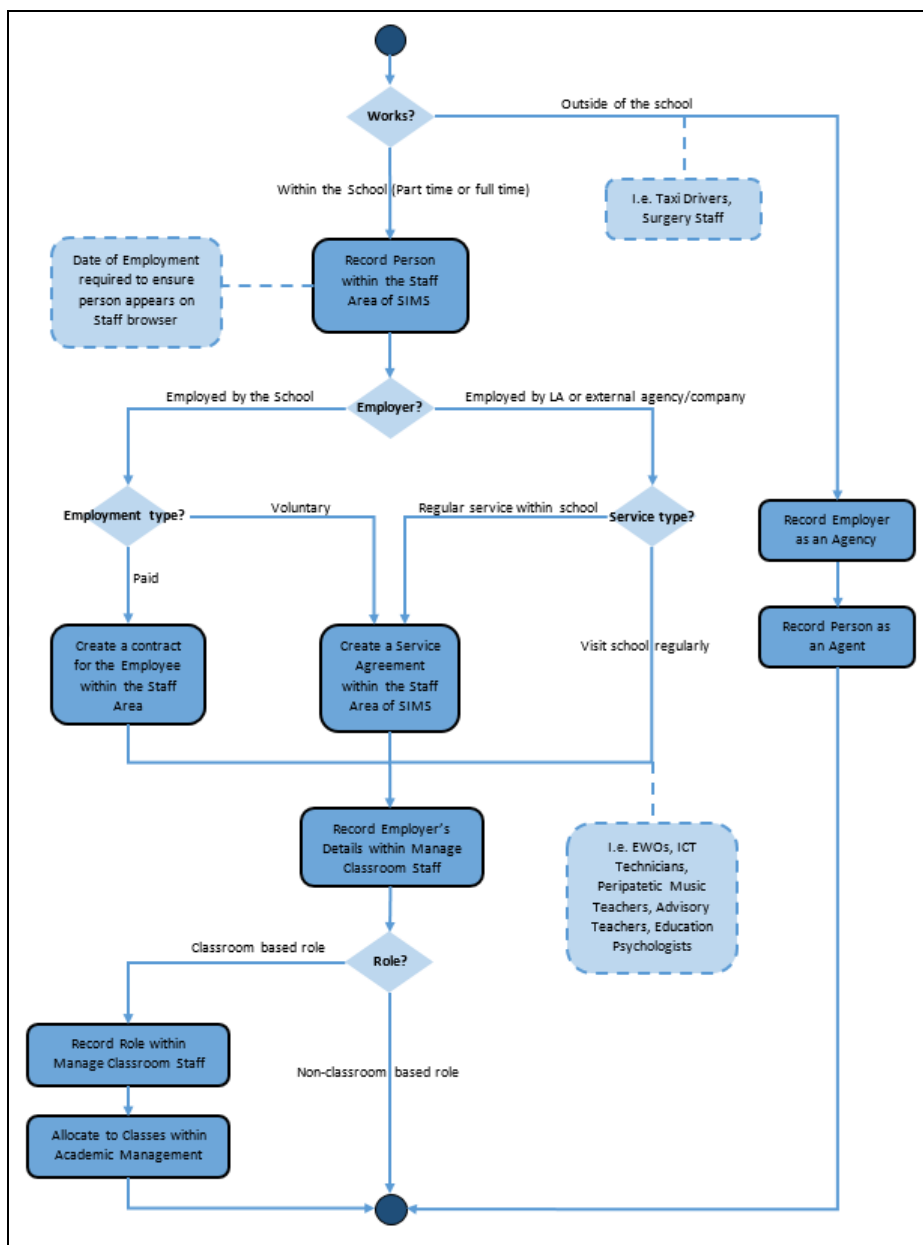
When adding a new person into SIMS, it is advisable to consider the type of role, function or data responsibilities that they will be required to undertake in the school before entering their details. These considerations will help you to determine which area of SIMS the person 'belongs' to, e.g. as a staff member, a pupil/student's contact, an agent for an external agency, etc.

The following table details the four main 'people' areas in SIMS:

Term	Definition	Menu Route
Employee	A person who has a contract of employment paid by the school, e.g. dinner lady, groundsman, etc. They are employed by the school and are included in the School Workforce Return.	Focus Person Staff
Staff	A person who has a contract of employment paid by the school. In SIMS, they are generally teachers, LSA's and TA's and are included in the School Workforce Return.	Focus Person Staff or Manage Classroom Staff
Agent	An individual who works for a recognised, external agency and who may have some involvement with a pupil/student, e.g. as a doctor, speech therapist, etc. They are not paid by the school and are not included in the School Workforce Return.	Focus Person Agents
Contact	Often a family member or a close friend of the pupil/student's family who can be contacted in the case of an emergency. They may also be former pupil/students or employees whose children attend the school in which they work. They are not paid by the school and are not included in the School Workforce Return.	Focus Person Contacts

Where an element of doubt or uncertainty exists, individuals who work within the school but are not employed by the school should be recorded as Agents in SIMS.

Please see the following flow chart for additional information.



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Introduction

The SIMS **Home Page** provides an overview of the key and relevant content stored in SIMS relating to the currently logged in SIMS user. The information available to display includes events from the School Diary, reminders and messages. It is also possible to display attendance, assessment and pupil/student conduct summaries, tailored to the lessons for which you are the main class teacher.

The SIMS **Home Page** is displayed automatically each time you log into SIMS. If you close the screen, it can be re-opened by selecting **Focus | Home Page**.

When you first log into SIMS, a default set of panels will be displayed on your SIMS **Home Page**. The panels displayed are determined by your System Manager/Administrator and by the default Home Page group(s) to which you have assigned. However, many of the panels on the SIMS **Home Page** can be configured to display information relevant to you and your role. The display order of the panels can be changed and the text on each panel can be also be amended to reflect your requirements.

When SIMS is upgraded, all of your personalised settings are retained. Any changes you make to the layout and display of the SIMS **Home Page** affect the display of your Home Page only; these changes are not reflected on the Home Page of other SIMS users.

Searching for People using the Home Page

The SIMS **Home Page** enables you to search for and select a person recorded in SIMS (i.e. a pupil/student, member of staff, contact, applicant or agent) to display their full record.

IMPORTANT NOTE: The functionality available to view personal details depends on the permissions assigned to you in SIMS System Manager.

TIP: The Quick Search functionality can be accessed by pressing **CTRL + Q** anywhere in SIMS. This returns you to the SIMS **Home Page**, from where you can carry out a search.

This functionality enables you to search for a person using any of the following criteria:

- Person's name

NOTE: Initially, surnames, legal surnames, forenames and chosen names are interrogated. If no results are found, SIMS searches through middle names. If results are still not found, SIMS attempts to match on words that sound like the search criteria entered.

- Admission number
- Candidate number
- Telephone number
- Address
- Email address
- UPN
- UCI
- Vehicle

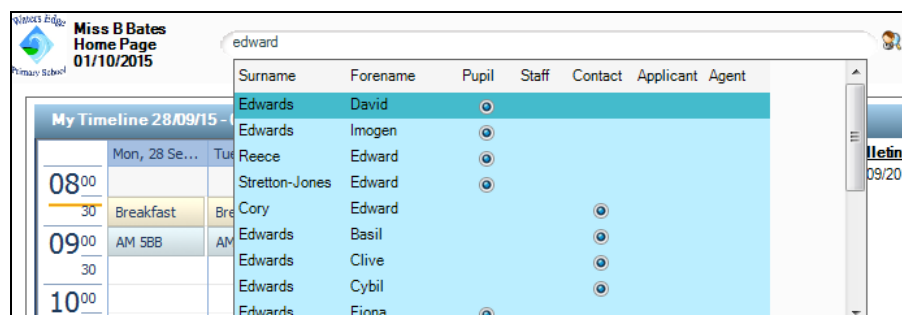
From the SIMS **Home Page**, enter the required search criteria (at least two characters) in the **Quick Search** field at the top of the page. The search bar is not case sensitive, so entering Jones would reveal the same results as jones or JONES.



Click the **Search** button to display a list of people recorded in SIMS who match the search criteria entered.



Search button



NOTE: If you enter a single character or enter *help* then click the **Search** button, a list of filter options is displayed for guidance (please see Applying Filters for the Quick Search on page 10).

The adjacent radio button indicates the type of person as they are recorded in SIMS, e.g. **Student**, **Staff**, **Contact**, etc.

To assist in the identification of the required person, particularly where more than one occurrence of a name exists in SIMS, hovering over a radio button provides additional information. For example, hovering over the **Student** radio button shows the pupil/student's **Reg Group** and **Year Group** and hovering over the **Contact** radio button shows all of their **Associated Students**. If the person is a pupil/student or member of staff, the hover help will display their current timetable location. In the following example, the pupil/student is not timetabled at this time.



To learn the whereabouts of a person (at a time in the past or present), enter their name, date (optional) and time. For example, entering Ben Abbot 10:30 and pressing **Enter** displays all people recorded in SIMS named Ben Abbot. If the person is a pupil/student or member of staff, hovering over their name in the search results displays their timetable location as of 10:30 today. Entering Ben Abbot 27/06/2013 10:30 and pressing **Enter** displays their timetable location as of that date and time.

If the search returns more than 120 possible matches, the content of the hover help is reduced to enhance the performance of the search functionality.

IMPORTANT NOTES: The **Contacts** column will be hidden if you have only View permissions for contacts. Contacts recorded in SIMS solely as a next of kin will be displayed in the search results only if you have View permissions for next of kin.

Once you have identified the required person, double-click their name to display their full record in the appropriate area in SIMS, from where the information can be edited.

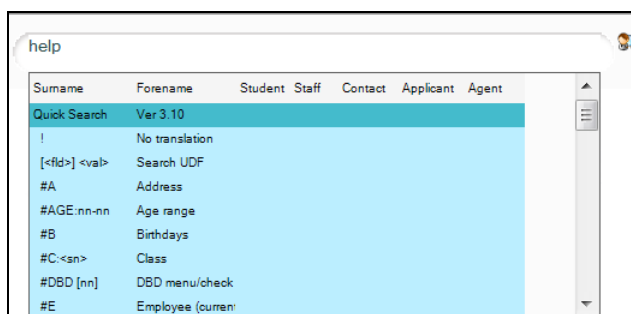
Person Type	Page Opened
Student	Pupil (or Student) Details page (also accessible via Focus Pupil (or Student) Pupil (or Student) Details) or Pupil (or Student) Teacher View page (also accessible via Focus Pupil (or Student) Pupil (or Student) Teacher View) The page opened is governed by the option selected on the Pupil (or Student) Teacher View Setup page (accessed via Tools Setups Pupil (or Student) Teacher View)
Staff	Employee Details page (also accessible via Focus Person Staff)
Contact	Contact details page (also accessible via Focus Person Contacts)
Applicant	Application page (also accessible via Focus Admission Application)
Agent	Agent Details page (also accessible via Focus Person Agents)

Applying Filters for the Quick Search

The Quick Search functionality enables you to enter filters, which can be used to further refine the results of a search, e.g. to display all females with a name containing Smith.

These search filters, which start with the # symbol, are used to filter name searches. You can use as many of the following filters in a search as required. Additional search filters can be used on other data items.

TIP: If you enter a single character or enter `help` then click the **Search** button, a list of filter options is displayed for guidance.



Token	Description
#B	Searches for birthdays of pupil/students today, tomorrow or the next day, with an indicator of their age on that birthday (if they will be under 21 years of age).
#C:<sn>	Searches for student members of the timetable class with short name. Entering #C:7a/Mu1 #M displays all males currently in class 7a/Mu1. Entering #H:flemming #C:7a/Mu1 displays anyone in Flemming house who is also in class 7a/Mu1. Entering #C:Mu displays anyone currently belonging to a music class.
#D	Searches for non-confidential School Diary events. Entering #D finds non-confidential events within 14 days of the effective date. Entering #D /30 finds non-confidential events within 30 days of the effective date. Entering #D inset /60 finds non-confidential events containing the word 'inset' within 60 days of the effective date.
#E	Searches for current employees. Entering #E d%y displays current employees with a name containing d followed by y. To indicate a precise number of intermediate letters, you should use a question mark for each one. Entering #E a??n #F displays all female current employees with a name containing the letters a and n with two more letters between them.

Token	Description
#F	Searches for females only. Entering #F jones (or jones #F) displays all females with a name containing jones. Entering #F jones k (or jones k #F) displays all females with a name containing jones k.
#H:<sn>	Searches for pupil/student members of a house with the given short name. Entering #H:Darwin #M smith displays all males with a name containing smith in Darwin house. Entering #H:Darwin #M smith 19/05/2013 displays all males with names containing smith who were in Darwin house on the given date.
#R:<sn>	Searches for pupil/student members of the given registration group. Entering #R:5D susan displays anyone called Susan (or with a name containing susan) in the registration group 5D. Entering #R:5D #M displays all the males in 5D. Entering #R:5D displays everyone in 5D.
#S	Current pupil/students. Entering #S wilkinson displays all current pupil/students called wilkinson. Entering #S displays all current pupil/students.
#Y:<sn>	Searches for student members of the given year group. Entering higgins #Y:7 displays anyone in Year 7 called higgins. Entering #Y:8 #H:newton displays all current year 8 students in Newton house. Entering #Y:6 #H:newton #F J displays girls in year 6 and Newton house called J (i.e. having a name containing J).

**More Information:**

Applying Filters for Birthdays on page 12

Applying Filters for Vehicles on page 13

Applying Filters for Addresses and Email Addresses on page 13

Applying Filters for Telephone Numbers on page 14

Using Wildcard Characters on page 18

Applying Filters for Birthdays

The Quick Search functionality enables you to obtain a list of pupil/students with a birthday today, tomorrow or the next day. The information displayed includes the day on which the birthday falls, together with how old they are (if they are under 21 years of age).

Entering #B displays pupil/students with birthdays today, tomorrow or the next day.

Entering #B #S displays current pupil/students with birthdays today, tomorrow or the next day.

Entering #B 12/12/2015 displays pupil/students with birthdays between 12 December and 14 December 2015.

Entering #B #H:newton displays pupil/students in Newton house with birthdays today, tomorrow or the next day.

Entering #B #S #H:newton 12/12/2015 displays current pupil/students in Newton house with birthdays between 12 December and 14 December 2015.

Applying Filters for Age

It is possible to restrict the search results to pupil/students within a specific age range, up to 19 years of age.

Enter #AGE:16 to display a list of pupil/students who are aged 16.

Enter #AGE:6-12 to display a list of pupil/students who fall within the age range of 6-12.

Enter #DOB 22/12/2005 to display a list of pupil/students with that specific date of birth. Substitute any of the digits with an x to locate pupil/students whose birthdays fall on a date with some unknown elements, e.g. #DOB xx/12/2005.

Applying Filters for Vehicles

The Quick Search functionality enables you to search for a person based on their vehicle. It is possible to search on the colour, model or registration number of the vehicle. If you enter more than one vehicle search filter, all of these values must match to obtain a result.

NOTE: Any single letters included in the search are checked against the vehicle registration numbers only.

Entering #V E displays vehicles with a registration number containing the letter E.

Entering #V BMW displays vehicles with a registration number containing the letters BMW or where the model is a BMW.

Entering #V E RED displays vehicles with a registration number containing the letter E and where the colour is red.

Entering #V E RED BMW displays vehicles with a registration number containing the letter E, where the colour is red and the model is BMW.

Applying Filters for Addresses and Email Addresses

The Quick Search functionality enables you to search for a person based on their postal or email address.

NOTE: If you enter multiple address filters, they must be entered in the order they are displayed in the address. For example, 47 Church Lane rather than Church Lane 47 (where 47 is the house number).

Entering #A 47 displays people whose address contains, for example, 47, 147, 471, etc. as a house number or as part of a post code.

Entering #A 47 Church displays people whose address contains 47 (as the house number only) and later the word Church in the address.

Entering #A 47 Church Lane displays people whose address contains 47 (as the house number only), then the word Church then the word Lane in the address.

Entering #A 47 Church Lane 47 displays people whose address contains 47 (as the house number only), then the word Church, then the word Lane in the address and 47 as part of the post code.

Entering john #A Lane displays people whose name contains John and whose address contains the word Lane.

NOTE: If you want to search on a person's name and part of their address, the name filter must be entered before the #A filter.

Applying Filters for Telephone Numbers

The Quick Search functionality enables you to obtain a list of people based on all or part of a recorded telephone number. This filter ignores any spaces or hyphens that have been recorded as part of the telephone number.

Entering #T 6864 displays people whose telephone number contains the digits 6864 consecutively, e.g. 01234 686400, 01268 640000, 01268640000, 01268-640000, etc.

NOTE: Although the search is carried out on all recorded telephone numbers, the hover help displays only information on the main telephone number.

Applying Filters for Students or Staff Records with Incomplete or Conflicting Data

It is possible to use the Quick Search functionality to identify incomplete pupil/student and staff data, as well as to isolate records that contain conflicting information.

These search filters, which start with the ~ symbol, can be used to search for the following types of data.

Token	Description
~A	Current pupil/students (not Guests) with no recorded admission number.
~B	Current pupil/students or employees with no recorded date of birth.
~C	Current pupil/students with no recorded current curriculum year.
~D	Current pupil/students over the age of 14 with no recorded candidate number.
~E	Current pupil/students with no recorded ethnic code or category.

Token	Description
~F	Current pupil/students with no recorded first language.
~G1	Current staff, pupil/students or contacts with no recorded gender.
~G2	People with a title that conflicts with their recorded gender, e.g. males with the title of Mrs or females with the title of Mr, etc.
~G3	Contacts with a relationship type that conflicts with their gender, e.g. female step-fathers or male mothers, etc.
~H	Current pupil/students or employees with no recorded current home address.
~I	Current pupil/students aged over 14 with no recorded UCI.
~L	Current pupil/students with no recorded home language.
~M	Current pupil/students with no recorded current meal type.
~O	Current pupil/students with no recorded contacts.
~R	Current pupil/students with no recorded current registration group.
~T	Current pupil/students or applicants with titles, or employees without titles.
~U	Current pupil/students with no recorded UPN, or (in India only) with no UID.
~V	Current pupil/students with no recorded current travel mode.
~X	Current pupil/students with no recorded Local UPN.
~Y	Current pupil/students with no recorded current year group.
~Z	Current pupil/students with no recorded Fees Reference.

The term 'current' is relevant only if you have not included a date in the **Quick Search** field.

It is possible to combine searches by including more than one letter, e.g. ~BU enables you to search for a missing date of birth and a missing UPN. However, you cannot mix a ~ search with a # search. It is not possible to mix different types of search, e.g. you cannot enter ~B fred, expecting to display a list of pupil/students called Fred and who have no recorded date of birth.

Including Linked People in the Search

To display people who are linked to those in your initial search, enter #LNK in the **Quick Search** field. The following associations are displayed:

- employee/next of kin
- employee/other staff contacts
- pupil/student or applicant/family or agent contacts

- contacts of pupil/student or applicant with parental responsibility/another contact with parental responsibility for the same pupil/student.

For example, entering Jack Robinson finds pupil/students of this name. Entering Jack Robinson #LNK also locates their mother, father, aunt and doctor, etc.

NOTE: Care must be taken to ensure that the linked individual is associated with the specific pupil/student for whom you are searching.

It is also possible to locate siblings of the pupil/student for whom you are searching by entering #SIB in the **Quick Search** field. In this instance, sibling is defined as any pupil/students who share a common relation who has parental responsibility for both children.

Checking for Duplicate Data Items

Entering > in the **Quick Search** field enables you to identify any of the following duplicate data items.

Search	Meaning
>EXNO	Finds people with an exam number that is not unique.
>ADNO	Finds people with an admission number that is not unique.
>UCI	Finds people with a UCI that is not unique.
>UPN	Finds people with a UPN that is not unique (not in India).
>ULN	Finds people with a ULN that is not unique.
>CREC	Finds people with more than one exam candidate record.
>HADR	Finds people with more than one current home address.
>UDI	Finds people with a UDI that is not unique (in India only).
>	Finds anyone with any of the above data issues.

Searching for Values in a User Defined Field

It is possible to search for a value specified in a user defined field by entering an excerpt from the description, e.g. [Locker Number], in the **Quick Search** field. User defined fields are identified by the text enclosed within square brackets.

This displays a list of pupil/students or other people in the school who are associated with the user defined field.

Maintaining Shortcuts

Creating Shortcuts

It is possible to create shortcuts for items that you regularly search for using the Quick Search functionality.

Enter +\$ before entering the filter for the required value. Shortcuts created in this manner are visible only to you.

Enter +\$\$ before entering the filter for the required value. These shortcuts can be accessed by all SIMS users.

Viewing Shortcuts

View your own shortcuts by entering \$ in the **Quick Search** field. The codes and descriptions of all your shortcuts are displayed. Any shortcuts that are visible to all users can be located by entering \$global.

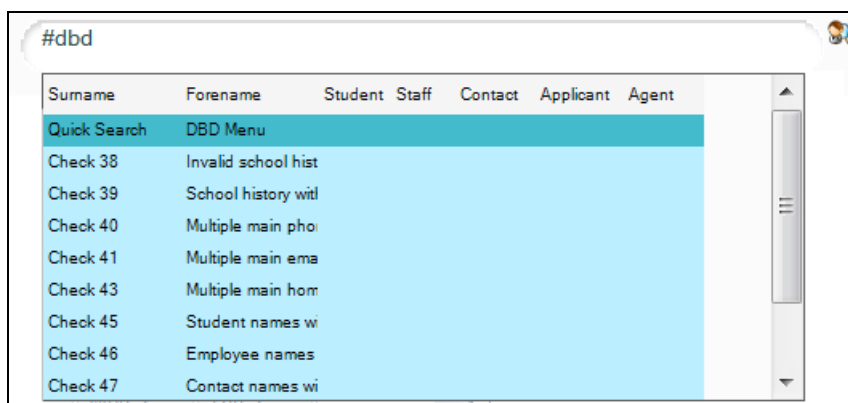
Deleting Shortcuts

It is possible to delete shortcuts by entering -\$XXX, where XXX is the code of the shortcut.

Searching using Database Diagnostic Conditions

It is possible to activate a number of system diagnostics to further tidy your school's data, using the Quick Search functionality.

Entering #DBD displays a list of numbered diagnostic checks.



Token	Description
Check 38	Locates any pupil/students with school history records for the current school that have an end date earlier than the start date or two overlapping records. These records are excluded from the Validate Memberships routines.
Check 39	Finds pupil/students who have school history records without an on-roll flag.
Check 40	People with multiple main phone numbers. Only one number per person should be marked as main.
Check 41	People with multiple main email addresses at the same location. Only one email address per person should be marked as main.

Token	Description
Check 43	People with multiple current main home addresses. Only one home address per person should be marked as main.
Check 45	Locates current pupil/students whose names contain unusual characters: <?\$&=, etc. or a digit or a defined title.
Check 46	Current employees whose names contain unusual characters.
Check 47	Contacts whose names contain unusual characters.
Check 56	People with invalid phone locations.
Check 57	People with invalid email locations.
Check 73	People with blank email or phone records.
Check 92	Pupil/students with overlapping SEN need types.

Using Wildcard Characters

The Quick Search functionality enables you to enter wildcard search characters in place of letters. This is particularly useful if you know only part of their name or are unsure of the spelling of their name, for example:

- The **?** wildcard character can be used in place of a single letter.
 - Entering `all?n` displays people whose name contains the letters `all`, then any letter, followed by an `n`. The letters `all` do not have to be the first letters of their name. For example, `all?n` returns `allan`, `allen`, `ballinger`, etc.
- The **%** wildcard character can be used in place of any number of letters, including zero.
 - Entering `a%` displays people with an `a` in their name followed by any number of letters. The letter `a` does not have to be the first letter of their name. For example, `a%` returns `abbot`, `davies`, `crane`, etc.
 - Entering `a%t` displays people with an `a` in their name, followed by any number of letters, then a letter `t`. The letter `a` does not have to be the first letter of their name and the letter `t` does not have to be the last letter of their name. For example, `a%t` returns `abbot`, `astwick`, `barton`, etc.
 - Entering `a%b%t` displays people whose name contains the letters `a`, `b` and `t` (in that order) with any number of characters in between. The letter `a` does not have to be the first letter of their name. For example, `a%b%t` returns `alberto`, `elizabeth`, `lambert`, etc.

Running Special Patches

Some patches provided by Capita SIMS may require you to specify particular parameters to enable the patch to be run successfully. You can enter and modify these parameters using the Quick Search functionality.

Enter `#params 19777|Weston%on%Sea|`. The `#params` filter identifies that patch parameters are being specified, followed by the patch number of 19777 and the school name, etc.

A maximum of six parameters can be specified, each separated by the vertical slash '|'. The current status of the patch is displayed in the Status Bar at the bottom of the Home Page. This indicates whether the patch has been applied or not.

If the patch has been applied, a message similar to the following is displayed:

Parameters for patch 19777 (1) Weston% on % Sea (2)
Weston% on % Sea patch has been applied: 123 rows updated.

If the message indicates that there were invalid parameters, you must correct the parameters entered and ensure that they correspond with the patch documentation supplied.

Viewing the My Timeline Panel

Your timetable is displayed in the **My Timeline** widget on the SIMS **Home Page**.

	Mon, 02 Nov...	Tue, 03 Nov...	Wed, 04 Nov...	Thu, 05 Nov...	Fri, 06 Nov...
08:00					
09:00	Mon: 1 10y/Sc2 Science Lab	Tue: 1 9y/Sc1 Science	Wed: 1 11y/Sc2 Science Lab	Thu: 1 13A/Bi1 Science Lab	Fri: 1 13A/Bi1 Science Lab 1 09:15 -
10:00	Mon: 2 PPA 10:15 -	Tue: 2 9y/Sc1	Wed: 2 11y/Sc2	Thu: 2 13A/Bi1	
11:00	Mon: 3 8B/Re(Cover) Humanities	Tue: 3 10y/Sc2 Science Lab	Wed: 3 7D/Sc Science Lab 1 11:35 -	Thu: 3 9y/Sc1 Science Lab	Fri: 3 7D/Sc Science Lab 1 11:35 -
12:00		Tue: 4 11y/Sa2 Science Lab	Wed: 4 7D/Sc Science Lab 1 12:35 -	Thu: 4 10y/Sa2 Science Lab	Fri: 4 11y/Sa2 Science Lab
13:00					
14:00	PM 11D Mon: 5 13A/Bi1	PM 11D	PM 11D Wed: 5 PPA 14:30 -	PM 11D Thu: 5 8F/Ps Science Lab	PM 11D Fri: 5 10y/Sa2
15:00	SLT Detention	Chess and Board Games	Departmenta	H o SL T M e	Sc ho
16:00					
17:00					
18:00					
19:00					

By default, your timetable is displayed for the current working week. Today's date is indicated on the timeline by a yellow highlight on the date in the heading row. In the previous graphic, today's date is Monday 2 November 2015. The scope of the view is displayed in the panel header. In the previous graphic, the timetable for the period Monday 2 November 2015 to Friday 6 November 2015 is displayed.

NOTE: The current time can be deduced by viewing the intersection of the highlighted date in the column header and the highlighted time bar displayed in the row header. In the previous example, it is approximately 09:30.

The items that can be displayed on your timeline are defined by the timeline configuration process (please see *Configuring the Home Page Timeline* on page 102). By default, the following items are displayed on your timeline:

- School events (cream background). In the previous graphic, a Chess and Board Games event is scheduled for 15:30 on Tuesday 3 November
- Timetabled lessons (grey-blue background). In the previous graphic, all timetabled lessons are displayed in grey-blue
- Cover assignments (yellow background). In the previous graphic, there is a cover assignment scheduled for 11:35 on Monday 2 November
- Detentions (red background). In the previous graphic, a detention session is scheduled for 15:30 on Monday 2 November
- NCC periods (turquoise background)
- Cover rota periods (green background)
- PPA periods (light blue background). In the previous graphic, a PPA period is scheduled for 10:15 on Monday 2 November
- Absences
- Covered lessons/NCCs.

The range of options available on the **Timeline** widget are discussed in the following sections.



More Information:

Changing the Displayed Date of the Timeline on page 20

Changing the Interval of the Timeline Widget on page 22

Changing the My Timeline View on page 21

Printing the Content of the Timeline Widget on page 22

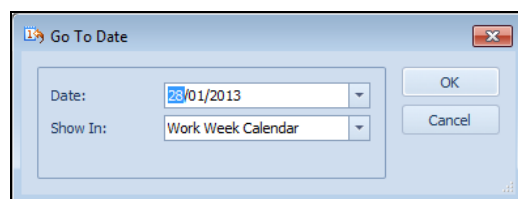
Changing the Displayed Date of the Timeline

By default, your timetable is displayed for the current working week. This can be changed using right-click functionality in the date bar at the top of the **My Timeline** widget. This can be used in conjunction with the **View** options (please see *Changing the My Timeline View* on page 21) to present the required display.

Right-click a date in the heading row at the top of the **Timeline** widget to display a pop-up menu.

Mon, 21 Jan 2...	Tue, 22 Jan 2...	Wed, 23 Jan 2...	Thu, 24 Jan 2...	Fri, 25 Jan 2013

- To go to a specific date, select **Go to Date** to display the **Go To Date** dialog.



- Enter the required **Date** or select a date from the drop-down list.
- Select the required timeline view from the **Show In** drop-down list. The options are **Day Calendar**, **Work Week Calendar**, **Week Calendar**, **Month Calendar**.
- Click the **OK** button to return to the **My Timeline** widget.
- To revert to today's date, select **Go to Today**.

*NOTES: The date selected will show the **My Timeline** for that date in the selected view (please see Changing the My Timeline View on page 21).*

*The display settings are reset the next time you open the SIMS **Home Page**.*

Changing the My Timeline View

The display can be amended to show your timetable in one of the following formats:

Timeline View	What is Displayed?
Day View	Displays your timetable for today only.
Work Week View	Displays your timetable for the current working week. This is the default view.
Week View	Displays only events for which you are timetabled for the whole week (including weekends).
Month View	Displays only events for which you are timetabled for the whole month (including weekends).

Right-click a date in the column heading at the top of the **My Timeline** widget to display a pop-up menu. Alternatively, right-click a time in the row headings to access the same functionality.

Mon, 21 Jan 2... Tue, 22 Jan 2... Wed, 23 Jan 2... Thu, 24 Jan 2... Fri, 25 Jan 2013

Select **Change View To** then one of the following options to achieve the required view:

- Day View
- Work Week View (default)

- Week View
- Month View.

*NOTES: The view selected will show the **My Timeline** widget for the selected timeframe (please see Changing the Displayed Date of the Timeline on page 20).*

*The display settings are reset the next time you open the SIMS **Home Page**.*

Changing the Interval of the Timeline Widget

The time interval can be amended to show the content of the **My Timeline** widget in greater detail.

Right-click a date in the row heading on the **My Timeline** widget to display a pop-up menu.



The previous graphic shows a 30 minute time interval.

Select one of the following options to achieve the required view:

- 60 Minutes
- 30 Minutes
- 15 Minutes
- 10 Minutes
- 6 Minutes
- 5 Minutes

NOTES: The current selection is indicated by a tick in the pop-up menu.

*The more regular the interval, the more detailed the view on the **My Timeline** widget.*

*The display settings are reset the next time you open the SIMS **Home Page**.*

Printing the Content of the Timeline Widget

The content of the **My Timeline** widget can be printed.

The printed output produces the view of the **My Timeline** widget displayed on-screen at the time of printing. Therefore, you must prepare the **My Timeline** widget (i.e. select the required timeframe, the view and the interval) prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the **Preview** page.



Options button

Green Abbey School

04 March - 08 March 2013

March 2013

M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April 2013

M	T	W	T	F	S	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

	04 March	05 March	06 March	07 March	08 March
09 ⁰⁰	08:53-09:15 AM 11D 09:15-10:15 Mon:1 11y/Sc2 Science Lab 1 AA	08:53-0 09:15-10:15 Tue:1 9y/Sc1	09:00-09: 09:15-10:15 Wed:1 10y/Sc2 Science Lab 1 AA	08:53-09:15 AM 11D 09:15-10:15 Thu:1 12A/Bi1 Science Lab 1 AA	08:53-0 09:15-10:15 Fri:1 12A/Bi1
10 ⁰⁰	10:15-11:15 Mon:2 PPA	10:15-11:15 Tue:2 9y/Sc1 Science Lab 1 AA	10:15-11:15 Wed:2 10y/Sc2 Science Lab 1 AA	10:15-11:15 Thu:2 12A/Bi1 Science Lab 1 AA	
11 ⁰⁰					
12 ⁰⁰		11:35-12:35 Tue:3 11y/Sc2 Science Lab 1 AA	11:35-12:35 Wed:3 7D/Sc Science Lab 1 AA	11:35-12:35 Thu:3 9y/Sc1 Science Lab 1 AA	11:35-12:35 Fri:3 7D/Sc Science Lab 1 AA
13 ⁰⁰	12:35-13:35 Mon:4 13C/Hi1(Cover) Humanities Room 5 AP	12:35-13:35 Tue:4 10y/Sa2 Science Lab 1 AA	12:35-13:35 Wed:4 7D/Sc Science Lab 1 AA	12:35-13:35 Thu:4 11y/Sa2 Science Lab 1 AA	12:35-13:35 Fri:4 10y/Sa2 Science Lab 1 AA
14 ⁰⁰	14:08-14:30 PM 11D 14:30-15:30 Mon:5 12A/Bi1 Science Lab 1 AA	14:08-14:30 PM 11D	14:08-14:30 PM 11D 14:30-15:30 Wed:5 PPA	14:08-14:30 PM 11D 14:30-15:30 Thu:5 8F/Ps Science Lab 1 AA	14:08-14:30 PM 11D 14:30-15:30 Fri:5 11y/Sa2 Science Lab 1
15 ⁰⁰					
16 ⁰⁰		15:30-16:30 SLT Detention (5) H1 AA	16:00-16:30 Departm	16:00-17:30 SMT Meeting	
17 ⁰⁰					

Abell Anita
1/1
04/03/2013 9:12:24

The preview displays your school name and the timeframe of the timeline, together with minimised calendars for the current and following month. On the minimised calendars, the days that contain a scheduled lesson, detention session, etc. are displayed in bold.

2. Click the **Print** button to print your timetable.

More Information:

Changing the Displayed Date of the Timeline on page 20

Managing Pupil/Students | 23

Changing the My Timeline View on page 21

Changing the Interval of the Timeline Widget on page 22

Viewing the School Diary

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Click the **Options** button in the **My Timeline** panel then select **School Diary** from the pop-up menu to display the **School Diary** page.



Options button

School Diary							
- Academic Year 1994/1995 - Academic Year 1995/1996 - Academic Year 1996/1997 - Academic Year 1997/1998 - Academic Year 1998/1999 - Academic Year 1999/2000 - Academic Year 2000/2001 - Academic Year 2001/2002 - Academic Year 2002/2003 - Academic Year 2003/2004 - Academic Year 2004/2005 - Academic Year 2005/2006 - Academic Year 2006/2007 - Academic Year 2007/2008 - Academic Year 2008/2009 - Academic Year 2009/2010 - Academic Year 2010/2011 - Academic Year 2011/2012 - Academic Year 2012/2013 - Academic Year 2013/2014							
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
	4 09:00 09:30 KS3 Weekly Assembly ...	5 16:00 16:30 Department Meetings	6 16:00 17:30 SMT Meeting	7 09:00 09:30 KS4 Weekly Assembly ...	8	9	10
	11 09:00 09:30 KS3 Weekly Assembly ...	12 16:00 16:30 Department Meetings	13 16:00 17:30 SMT Meeting	14 09:00 09:30 KS4 Weekly Assembly ...	15	16	17
	18 09:00 09:30 KS3 Weekly Assembly ...	19 16:00 16:30 Department Meetings	20 16:00 17:30 SMT Meeting	21 Spring Term	22 Easter Holiday	23	24
	25	26	27	28	29	30	31 March
1 April	2	3	4	5	6	7 Easter Holiday	

NOTE: The School Diary can also be accessed via the **School Diary** widget and via **Focus | School | School Diary**.



More Information:

Viewing the School Diary on page 40

Viewing My Groups

Any groups for which you are the supervisor can be viewed from the **My Timeline** widget.

1. Click the **Options** button in the **My Timeline** panel then select **My Groups** from the pop-up menu to display the **Groups for page**.



Options button

Effective Date
Effective Date: 10/03/2013   Refresh

1 Groups 

Type	Description	Role
Class	10y/Sa2	Main Class Teacher
Class	10y/Sc2	Main Class Teacher
Class	11y/Sa2	Main Class Teacher
Class	11y/Sc2	Main Class Teacher
Class	12A/Bi1	Main Class Teacher
Class	7D/Sc	Main Class Teacher
Class	8F/Ps	Main Class Teacher
Class	9y/Sc1	Main Class Teacher
Registration Group	11D	Registration Tutor

2. The **Effective Date** defaults to today's date but can be changed by entering the required date or clicking the **Calendar** button then selecting a date. If you change the date, you must click the **Refresh** button to update the list of **Groups**.

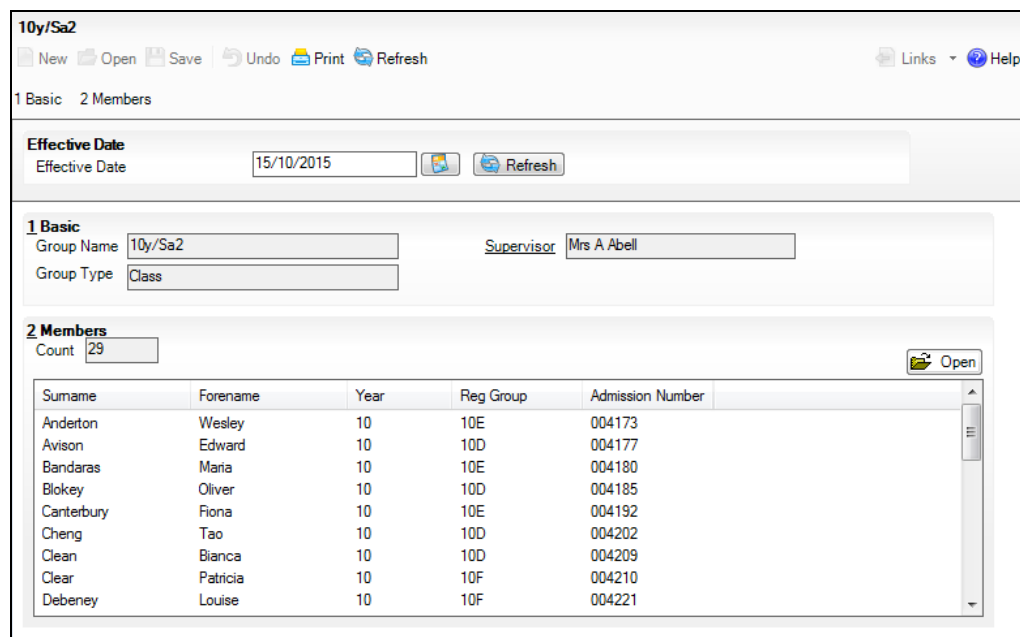
In the **Groups** panel, all the groups of which you are a member (on the effective date) are displayed, together with the group **Description** and the staff member's **Role** in the groups.

This information can be viewed in a variety of display orders. Right-click anywhere in the dialog then select **Type**, **Description** or **Role** from the pop-up menu to display the content in the selected order.

1 Groups 

Type	Description	Role
Type: Class		
Class	10y/Sa2	Main Class Teacher
Class	10y/Sc2	Main Class Teacher
Class	11y/Sa2	Main Class Teacher
Class	11y/Sc2	Main Class Teacher
Class	12A/Bi1	Main Class Teacher
Class	7D/Sc	Main Class Teacher
Class	8F/Ps	Main Class Teacher
Class	9y/Sc1	Main Class Teacher
Type: Registration Group		
Registration Group	11D	Registration Tutor

Revert to the original display by right-clicking anywhere in the dialog then selecting **Hide Groups** from the pop-up menu. Either double-click the group that you wish to view in more detail or highlight it then click the **Open** button.



10y/Sa2

New Open Save Undo Print Refresh Links Help

1 Basic 2 Members

Effective Date
Effective Date 15/10/2015 Refresh

1 Basic
Group Name 10y/Sa2 Supervisor Mrs A Abell
Group Type Class

2 Members
Count 29 Open

Surname	Forename	Year	Reg Group	Admission Number
Anderton	Wesley	10	10E	004173
Avison	Edward	10	10D	004177
Bandaras	Maria	10	10E	004180
Blokey	Oliver	10	10D	004185
Canterbury	Fiona	10	10E	004192
Cheng	Tao	10	10D	004202
Clean	Bianca	10	10D	004209
Clear	Patricia	10	10F	004210
Debeney	Louise	10	10F	004221

The **Basic** panel displays the **Group Name**, **Group Type** and **Supervisor**. If you have the appropriate permissions, you can click the **Supervisor** hyperlink to display their full employee record on the **Employee Details** page.

The **Members** panel displays all the group members, together with the number of members (**Count**).

This information can be viewed in a variety of display orders, as described in Step 2.

- To access the pupil/student record, double-click the required pupil/student or highlight them then click the **Open** button to display the **Student History** page.
- Click the **Print** button to print a copy of the list of groups.

Configuring the My Timeline Widget

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Click the **Options** button in the **My Timeline** panel then select **Configure** from the pop-up menu to display the **Timeline Configuration** dialog (please see *Configuring the My Timeline Panel* on page 103).



Options button

Refreshing the Content of the My Timeline Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **My Timeline** widget manually.

Click the **Refresh** button in the **My Timeline** widget to refresh its content.



Refresh button



More Information:

Configuring the My Timeline Panel on page 103

Taking the Register

Right-click the required class or registration group in the **My Timeline** widget then select **Take Register** from the pop-up menu to display the **Take Register** page for the selected class, enabling the register to be taken. For Attendance users, this displays AM or PM attendance registers. For Lesson Monitor users, this displays the applicable register.

Take Register

Marksheet

My List Entry

Take Register 10y/Sc2 Mrs. A Abell 06/03/2013

Save

Undo

Print

Refresh

Codes

Preserve

Extra Name

Class Photo

Minutes Late

Comments

Links

Current View

History

Today

Future

Present 0

Name	Reg	AM	Wed.1	Wed.2	Wed.3	Wed.4	PM	Wed.5
Deveraux, Brandon	10D	/	-	-	-	-	\	-
Douglas, James	10F	/	-	-	-	-	\	-
Duke, Inman	10D	/	-	-	-	-	\	-
Fagan, Emily	10E	/	-	-	-	-	\	-
Fisher, Craig	10F	/	-	-	-	-	\	-
Flack, Sara-Mae	10F	M	M	M	M	M	M	M
Foster, Adam	10D	/	-	-	-	-	\	-
Inglis, Luke	10F	/	-	-	-	-	\	-
Isherwood, Lolli	10F	/	-	-	-	-	\	-
Joseph, David	10D	/	-	-	-	-	\	-
Kennett, Ashley	10E	/	-	-	-	-	\	-
Kusserow, Josh	10E	/	-	-	-	-	\	-
Mahler, Maximilian	10E	/	-	-	-	-	\	-
Mamprin, Mo	10E	/	-	-	-	-	\	-
Manning, Joyce	10D	/	-	-	-	-	\	-
Nixon, Poppy	10D	/	-	-	-	-	\	-
Oakley, Wendy	10E	/	-	-	-	-	\	-
Oglander, Ralph	10D	/	-	-	-	-	\	-
Rainbird, Peaches	10D	/	-	-	-	-	\	-
Ramsbottom, Sally	10E	/	-	-	-	-	\	-
Randall, Holly	10F	/	-	-	-	-	\	-
Shi, Ameera	10E	/	-	-	-	-	\	-
Shishoo, Hari	10D	/	-	-	-	-	\	-
Smith, Ricky	10D	/	-	-	-	-	\	-
Snelling, Alisha	10E	/	-	-	-	-	\	-
Sole, Dover	10F	/	-	-	-	-	\	-
Trigg, Peter	10E	/	-	-	-	-	\	-
Troy, Derek	10D	/	-	-	-	-	\	-
Zahoor, Dina	10E	/	-	-	-	-	\	-



Additional Resources:

Taking a Register chapter in the *Managing Pupil/Student Attendance* handbook

Taking a Register chapter in the *Monitoring Session and Lesson Attendance* handbook

Generating a Student List Report

Right-click the required class or registration group in the **My Timeline** widget then select **Student List** from the pop-up menu to display the **Class** page or the **Registration Group** page (depending on the type of class selected), which displays the members of the selected class.

Class 9y/Sc1 05/03/2013

New Open Save Undo Print

1 Details 2 Members

Effective Date
Effective Date 05/03/2013 Refresh

1 Details
Name 9y/Sc1 Supervisor Mrs A Abell

2 Members
Count 30

Admission Number	Surname	Forename	Year
003763	Adams	Melanie	9
003768	Atkinson	Bridget	9
003771	Barnard	Andrew	9
003780	Butterfield	Liam	9
003781	Chalkie	Sarah	9
003884	Cook	Greg	9
003798	Evans	Kathleen	9
003799	Evans	Rhys	9
003893	Fung	Ruth	9
003806	Gould	Nicola	9
003810	Hardens	Christopher	9
003812	Heffernan	Luke	9
003818	Hume	Edmund	9
003819	Jarah	Sayid	9
003821	Jimenez	Miguel	9
003824	Lincoln	Phillip	9
003825	Llewellyn	Robin	9
003908	McDonald	Cameron	9
003842	Pikington	Sandy	9
003845	Renshaw	Simon	9
003846	Rhodes	Daniel	9
003849	Richardson	Keith	9
003854	Roulston	Haydn	9
003859	Scott	Michael	9
003864	Stanley	Eric	9
003869	Tankink	Bram	9
003870	Terry	Laura	9
003871	Thomas	Rhys	9
003877	Williams	Anna-Lucia	9
003922	Wilson	Anne	9

New
Open
Delete

From here it is possible to display a pupil/student's details (by highlighting their name then clicking the **Open** button) and to print the class list (by clicking the **Print** button).

Viewing Marksheets

Right-clicking the required class in the **My Timeline** widget then select **Marksheets** from the pop-up menu to display the **Find Marksheet** browser, which displays all the marksheets for which you have permission to view. Double-click the required marksheet to display it on the **My Marksheet Entry** page.



Additional Resources:

Entering and Reviewing Data using Marksheets chapter of the *Administering Assessment* handbook

Profile List Entry

Right-click the required class in the **My Timeline** panel then select **Profile List Entry** to display the **List Entry** browser. This enables teachers to work on groups for whom they are responsible and select comments for each pupil/student.



Additional Resources:

Selecting Comments using List Entry in the *Selecting Comments* chapter of the *Managing Pupil/Student Profiles* handbook

Viewing Class Photographs

Right-click the required class or registration group in the **My Timeline** widget then select **Class Photographs** from the pop-up menu to display the **Class Photo** dialog. This option is particularly useful for supply staff or new teachers, because it displays photographs of all the pupil/students in the selected class (if pupil/student photographs are recorded in SIMS).



The **Click for photographers** hyperlink opens a web page on the Capita SIMS website (<http://www.capita-sims.co.uk/our-partners/accredited-school-photographers>), which contains information about accredited school photographers. Click the **Print** button to print the photographs or the **OK** button to return to the SIMS **Home Page**.

Generating a Class List Report

Right-click the required class or registration group in the **My Timeline** widget then select **Class List Report** from the pop-up menu to display the **Class List Report** page or the **Registration Group List** page (depending on the type of class selected), which displays the members of the selected class. A range of additional functionality is available.

Class List Report: 10y/Sc2 as of 05/03/2013 (Membership Date 05/03/2013)

Save Browse Sort List Settings Move First Previous Next Move Last Photo Print Options Export

Font Arial 9 Fixed Columns 3 Row Divider 1 Nest Remove Rename AutoSize Remove Quick Print

Full Name	Gender	Date of Birth	Year Group	Reg Group
Deveraux, Brandon	Male	01/06/1998	Year 10	10D
Douglas, James	Male	18/05/1998	Year 10	10F
Duke, Inman	Male	19/12/1997	Year 10	10D
Fagan, Emily	Female	28/05/1998	Year 10	10E
Fisher, Craig	Male	10/02/1998	Year 10	10F
Flack, Sara-Mae	Female	03/11/1997	Year 10	10F
Foster, Adam	Male	27/05/1998	Year 10	10D
Inglis, Luke	Male	25/12/1997	Year 10	10F
Isherwood, Lolly	Female	09/01/1998	Year 10	10F
Joseph, David	Male	06/12/1997	Year 10	10D
Kennett, Ashley	Male	01/08/1998	Year 10	10E
Kusserow, Josh	Male	01/07/1998	Year 10	10E
Maher, Max	Male	21/06/1998	Year 10	10E
Mamprin, Mo	Male	01/10/1997	Year 10	10E
Manning, Joyce	Female	13/08/1998	Year 10	10D
Nixon, Poppy	Female	28/11/1997	Year 10	10D
Oakley, Wendy	Female	17/02/1998	Year 10	10E
Oglander, Ralph	Male	24/12/1997	Year 10	10D
Rainbird, Peaches	Female	19/06/1998	Year 10	10D
Ramsbottom, Sally	Female	03/02/1998	Year 10	10E
Randall, Holly	Female	16/10/1997	Year 10	10F
Shi, Ameera	Female	07/07/1998	Year 10	10E
Shishoo, Hari	Male	12/12/1997	Year 10	10D
Smith, Ricky	Male	20/10/1997	Year 10	10D
Snelling, Alisha	Female	09/12/1997	Year 10	10E
Sole, Dover	Male	01/12/1997	Year 10	10F
Trigg, Peter	Male	23/07/1998	Year 10	10E
Troy, Derek	Male	11/02/1998	Year 10	10D
Zahoor, Dina	Female	14/02/1998	Year 10	10E



Additional Resources:

Running the Class List Report in the Producing Student List Reports chapter of the Producing Student List, Student Analysis and Timetable Reports handbook

Viewing Event Details

Right-click the required event in the **My Timeline** widget then select **Show Event** from the pop-up menu to display the **School Event** dialog, which displays details of the recorded event. The information is displayed in read-only format.

School Event

Description: SMT Meeting

Category: Meeting Categories...

Start time: 07/03/2013 16:00 All day event ☐

End time: 07/03/2013 17:30 Recurrence...

Private ☐

Ok Cancel

Click the **Cancel** button to return to the SIMS Home Page.

Viewing Detention Details

Right-click the required class or registration group in the **My Timeline** widget then select **Show Detention** from the pop-up menu to display the **Detention Details** page, which displays the date and time of the detention session, the pupil/students who are scheduled to attend, any linked activities, etc.



Additional Resources:

Recording Detentions chapter of the *Managing Pupil/Students* handbook

Viewing the School Bulletins Panel

School bulletins can be published by users with School Administrator or Administrative Assistant permissions. Once published, they can be opened and viewed by all SIMS users (please see *Adding a School Bulletin* on page 32).

Any published bulletins are displayed in the **School Bulletins** widget on the SIMS **Home Page**.

*NOTE: If the number of published bulletins exceeds the number that can be displayed in the **School Bulletins** widget, the **More** hyperlink enables access to the additional bulletins in full screen mode.*

To access a bulletin from the minimised **School Bulletins** widget, click the name of the bulletin to display the **Edit School Bulletin** dialog. To access a bulletin from the maximised view of the **School Bulletins** widget, highlight the required bulletin then click the **Open** button to display the same dialog.

Attachment	Summary	Type	Owner
	Training Data Supporting Info...	School Bulletin	Blacker Adrian

The **Title** of the bulletin and the **Bulletin Date** are displayed in the **Basic Details** panel.

Any **Attachments** to the bulletin are displayed in the bottom panel.

For full instruction on adding, opening, viewing and deleting attachments, please refer to *Attaching a New Note/Document* in the *Using the Pupil/Student Links Panel* chapter of the *Managing Pupil/Students* handbook.

Adding a School Bulletin

This section is applicable only to users with School Administrator and Administration Assistant permissions.

If your school produces a weekly bulletin of forthcoming events, reminders to staff, etc. it can be posted to the **School Bulletins** widget on the **Home Page** of all SIMS users. This is a convenient method of providing information to all your staff.

1. Click the **Options** button then select **Add new** from the pop-up menu to display the **School Event** dialog.



Options button

2. Enter the **Title** of the bulletin and a **Bulletin Date** in the **Basic Details** panel.

For full instruction on adding, opening, viewing and deleting attachments, please refer to *Attaching a New Note/Document* in the *Using the Pupil/Student Links Panel* chapter of the *Managing Pupil/Students* handbook.

Removing a School Bulletin

This section is applicable only to users with School Administrator and Administration Assistant permissions.

School bulletins can be removed from the SIMS **Home Page** if they are no longer relevant or have been added in error.

NOTE: If a bulletin is removed, any associated documents remain on the Document Management Server.

1. Maximise the **School Bulletins** widget to full screen mode.
2. Highlight the bulletin you wish to delete then click the **Delete** button.
3. Restore the panel to minimised view and return to the SIMS **Home Page**.

Setting Up Reminders

Reminders can be set up to notify you when a deadline is about to be reached. This enables you to carry out appropriate action prior to the due date. You can select the events or personal tasks for which you want a reminder, together with the number of days notice. Once set up, reminders are displayed in the **My Reminders** panel on the SIMS **Home Page**.

Select **Focus | Alerts | Setup Reminders** to display the **Setup Reminders** dialog.

Student Related Reminders

Event Name	Active	Days in Advance
Free School Meal Eligibility	☐	0
Part Time Attendance Period	☐	0
Medical Events	☐	0

SEN Reminders

Event Name	Active	Days in Advance
SEN Review Due	☐	0
SEN Review Next	☐	0
SEN Provision	☐	0
SEN Events	☐	0

Admission Reminders

Event Name	Active	Days in Advance
Communication	☐	0

Attendance Reminders

Event Name	Active	Frequency	Date/Day
Conflicting Lesson Marks	☐	Daily	NONE
Extra Names	☐	Daily	NONE

OK Close

The reminders are split into the following panels:

- **Student Related Reminders**
- **SEN Reminders**
- **Admission Reminders** (only visible to schools who have applied a Basic or Full Admissions licence)
- **Attendance Reminders.**

Setting a Reminder as Active

All of the events displayed in the **Setup Reminders** dialog can be activated or deactivated. By default, all events are set as inactive, i.e. no reminders are set. You must now decide the events for which you want to receive a reminder.

1. Select the **Active** check box adjacent to the **Event Name** that you want to be reminded of, e.g. **Medical Events**. The **Days in Advance** column becomes red, indicating that the days need to be populated.

Student Related Reminders		
Event Name	Active	Days in Advance
Free School Meal Eligibility	☒	0
Part Time Attendance Period	☒	0
Medical Events	☒	0

2. Deselect the **Active** check box adjacent to each event for which you do not want to receive a reminder.

Specifying the Number of Days Notice

For each reminder set, you need to enter the number of days in advance of the event that you want to be reminded. A minimum of one and a maximum of 365 days can be entered.

1. Click in the applicable **Days in Advance** cell and enter the required number of days (the cell background changes to white).

Student Related Reminders		
Event Name	Active	Days in Advance
Free School Meal Eligibility	☒	30
Part Time Attendance Period	☒	20
Medical Events	☒	7

2. Repeat this process for any other reminders, if required.

Specifying the Frequency of Attendance Reminders

It is possible to specify the frequency of the reminders for **Conflicting Lesson Marks** and **Extra Names** in the **Attendance Reminders** panel.

Select **Daily**, **Weekly** or **Monthly** from the **Frequency** drop-down list. The options available from the **Date/Day** column depend on the **Frequency** selected.

Attendance Reminders			
Event Name	Active	Frequency	Date/Day
Conflicting Lesson Marks	☒	Daily	NONE
Extra Names	☐	Daily	NONE

- For **Daily** frequency, the **Date / Day** column cannot be adjusted because the reminder will occur at the earliest point of each day. This is either when SIMS is first opened or when SIMS first refreshes the **My Reminders** panel on the **SIMS Home Page**.
- For **Weekly** frequency, the **Date / Day** column provides a drop-down list that enables you to select the day of the week on which the reminder will be displayed.
- For **Monthly** frequency, the **Date / Day** column provides a drop-down list that enables you to select the date in the month on which the reminder will be displayed.



More Information:

Setting Panel Refresh Rates on page 71

Setting up Fees Reminders

Applicable only if the Fees licence has been applied.

It is possible to set up an alert to show bill payers with overdue bills and outstanding balances so that you can send out reminders to the relevant bill payers. The alerts will then be displayed on the **My Reminders** widget on the **SIMS Home Page**.

1. Select **Focus | Alerts | Setup Reminders** to display the **Setup Reminders** dialog.

Event Name	Active	No of Days	Debt Greater than	Payment Type
Unpaid Bills	☒	7	1.00	Cash, Monthly D...
Outstanding Debt	☐	0	0.00	

Payment Types

☒ Cash
☒ Monthly Direct Debit
☒ Termly Direct Debit
☒ Equal Instalment Direct Debit

2. Select the **Active** check box adjacent to the **Event Name** that you want to be reminded of, e.g. **Unpaid Bills**.

The definition of **No. of Days** varies depending on whether the reminder is for **Unpaid Bills** or **Outstanding Debt**:

- **Unpaid Bills** - number of days after the due date of the bill
- **Outstanding Debt** - number of days after the date defined on **Period 1** of the **Aged Debtors Report**.

3. Based on the relevant definition above, enter the appropriate **No. of Days** in the field provided.
4. Enter the value of the **Debt Greater than** to be included, e.g. £1.00.
5. The **Payment Type** is selected from the **Payment Types** table. The check boxes can be selected individually or by clicking the **Check All** and **Uncheck All** buttons.
6. Click the **OK** button to complete the selection and close the dialog.

Saving the Reminders

Once all the required information has been entered, click the **OK** button to save the reminders.

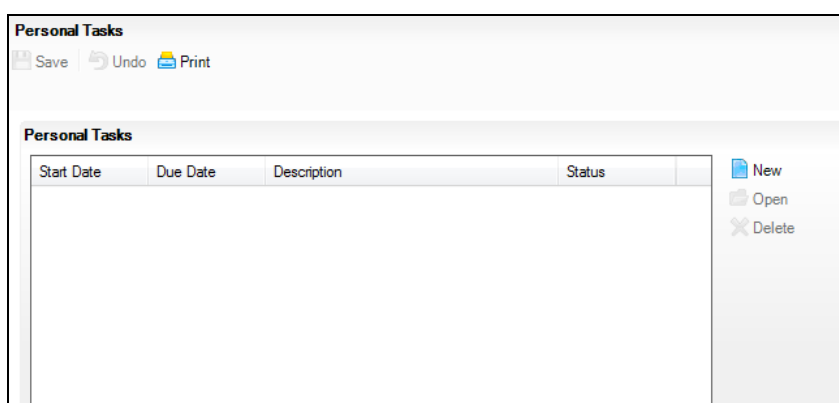
Setting Up Personal Tasks

Personal Tasks enable you to organise any particular task or event. It is possible to add your own personal notes to each task and set deadlines for the beginning or completion of each task, in a similar way to tasks in Microsoft® Outlook.

Reminders can be set up to prompt you at any point prior to the commencement or completion of a task. These reminders can also be added to the School Diary, if required. Any reminders set are displayed in the **My Reminders** panel of the **Home Page** on the defined date. For example, you can set a task to Mark history homework this evening, with a reminder to prompt you on the day the task is due to be completed and a calendar entry that is displayed on your **Home Page**.

Recording a Personal Task

1. Select **Focus | Alerts | Personal Tasks** to display the **Personal Tasks** page.



The **Personal Tasks** page displays a list of all personal tasks that have been added, including the designated **Start Date** and **Due Date**, **Description** and **Status**.

- Click the **New** button to display the **Add Personal Task** dialog.

- Enter the **Description** of the task, e.g. Mark history homework this evening.
- The **Start Date** and **Due Date** default to today's date but can be changed by clicking the **Calendar** button then selecting the required date.
The **Start Date** is the date on which you intend to begin the task and the **Due Date** is the date on which you intend to complete the task.
- By default, the **Priority** is set to **Medium**. This can be changed by selecting **High**, **Medium** or **Low** from the drop-down list. This setting is for personal use.
- Select the **Status** from the drop-down list, e.g. **Not-Started**, **Started**, **In-Progress** or **Completed**.

- If the **Start Date** of a personal task has passed and its **Status** is still set to **Not Started**, this task will be highlighted in red on the **Personal Tasks** page.
- If the **Due Date** of a personal task has passed and its **Status** is not set to **Completed**, then this task will be highlighted in red on the **Personal Tasks** page.

The **Status** of **Started** could be used to describe a task that you have just started. **In-Progress** could be used to describe an ongoing task that is in progress.

- Enter any additional information in the **Notes** field, such as Mark Year 7 and 8 History first.

When a personal task is considered important, you may want to set up a reminder that provides a prompt before this task is due. It is advisable to set a reminder to give you enough time to prepare for (or complete) the task. For example, you may benefit from a reminder the day before an important meeting.

- Select the **Reminder** check box to set a reminder for this task then click the **Calendar** button and select the date for the reminder.

NOTES: If a reminder is set for the task, the description is displayed in the **Subject** column of the **My Reminders** panel on the **SIMS Home Page**.

A reminder is displayed at the earliest point on the day it is due. This is either the first time SIMS is run on your workstation on that day or the first time the **My Reminders** panel on the **SIMS Home Page** is refreshed.

9. Select the **Add to Personal Diary** check box to add this task to your School Diary. The **Description** displays in the **School Diary** panel of your **SIMS Home Page** and on the School Diary itself (via **Focus | School | School Diary**).

Click the **Print Report** button to print a report of the selected personal task. The full details of the task are displayed in your web browser, from where it can be printed, if required.

10. Once all the required information has been entered, click the **OK** button.
11. Repeat steps 2 to 10 to add more personal tasks, if required.
12. Once you have added all required personal tasks, click the **Save** button.

Any new personal tasks are displayed in the **My Reminders** panel on the **SIMS Home Page**, once this panel has refreshed. If you selected the **Add To Personal Diary** check box, the personal tasks are also added to the **School Diary** panel on the **SIMS Home Page** and to the School Diary itself (via **Focus | School | School Diary**).



More Information:

Setting Panel Refresh Rates on page 71

Viewing /Editing a Personal Task

Personal tasks set up without reminders are displayed only on the **Personal Tasks** page. If you have elected to add the task to your personal diary, it will also be displayed on the School Diary.

1. Select **Focus | Alerts | Personal Tasks** to display the **Personal Tasks** page, listing all of your personal tasks.

Personal Tasks			
Start Date	Due Date	Description	Status
08/05/2013	08/05/2013	Mark Year 8 History homework this evening	Not-Started
09/05/2013	09/05/2013	Mark Year 9 History homework this evening	Not-Started

New
 Open
 Delete

- If the **Start Date** of a personal task has passed and its **Status** is still set to **Not Started**, this task will be highlighted in red.
- If the **Due Date** of a personal task has passed and its **Status** is not set to **Completed**, then this task will be highlighted in red.

- Highlight the required personal task then click the **Open** button to display its details in the **Edit Personal Task** dialog.

- Make the necessary changes then click the **OK** button to close the dialog.
- Click the **Save** button on the **Personal Tasks** page to save your changes. Once the SIMS **Home Page** refreshes, any changes made to your personal tasks are displayed.



More Information:

Setting Panel Refresh Rates on page 71

Recording a Personal Task on page 36

Viewing/Editing Tasks from the SIMS Home Page

A reminder can be set for your personal task, which prompts you at any point prior to the commencement or completion of a task. Reminders are displayed in the **My Reminders** panel on the SIMS **Home Page** when the reminder date is today. Personal tasks can be viewed and edited using the SIMS **Home Page**.

- Select **Focus | Home Page** to display the SIMS **Home Page**.
- In the **My Reminders** panel, click the required task to display its details in the **Edit Personal Task** dialog.

- Make any necessary changes then click the **OK** button to return to the SIMS **Home Page**.

*NOTE: If you chose to add the personal task to the School Diary, the task can be viewed by clicking it in the **School Diary** panel on the SIMS **Home Page**. The task can also be viewed by double-clicking it in the School Diary itself (via **Focus | School | School Diary**). However the task cannot be edited or deleted from either the School Diary or the **School Diary** panel on the SIMS **Home Page**.*

Deleting a Personal Task

Personal tasks can be deleted when they are no longer required.

NOTE: Careful thought should be given to deleting personal tasks because once they have been deleted, they cannot be recovered.

1. Select **Focus | Alerts | Personal Tasks** to display the **Personal Tasks** page.
2. Highlight the required personal task then click the **Delete** button. A message prompts for confirmation that you want to delete the task. Click the **Yes** button to confirm the deletion.

Viewing the School Diary

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Any school events are displayed in the **School Diary** widget on the SIMS **Home Page**.

*NOTES: The School Diary can also be accessed via the **Options** button in the **My Timeline** widget and via **Focus | School | School Diary**.*

*If the number of school events exceeds the number that can be displayed in the **School Diary** widget, the **More** hyperlink enables access to the additional events in full screen mode.*

1. To access a school event from the minimised **School Diary** widget, click the name of the event to display the **Event Details** dialog. To access an event from the maximised view of the **School Diary** widget, highlight the required event then click the **Open** button to display the same dialog.

The screenshot shows a window titled "SIMS Event Details". Inside, there is a form with the following fields and values:

- Event Type:** School Event
- Name:** Meeting
- Start Time:** 06/03/2013 16:00
- End Time:** 06/03/2013 16:30
- Notes:** Department Meetings

A "Close" button is located at the bottom right of the dialog.

The event details are displayed in read-only format.

2. Click the **Close** button to return to the SIMS **Home Page**.

Adding a School Diary Event

1. Click the **Options** button then select **Add new** from the pop-up menu to display the **School Event** dialog.



Options button

2. Enter a **Description** for the event. This text is displayed in the School Diary.
3. Select an appropriate event **Category** from the drop-down list.

*NOTE: If required, new categories can be created by clicking the **Categories** button, entering the category in the **New category** field and clicking the **Add** button. Click the **Ok** button to return to the **School Event** dialog.*

4. If the event is scheduled to last for an entire day, select the **All day event** check box. This disables the time drop-down lists.
5. Specify the **Start time** and **End time** for the event by entering the required dates (they default to today's date), or click the **Calendar** button adjacent to each field, then select the required dates. Select the required times from the drop-down lists. You cannot enter times for all day events.
6. Recurring events can be set up by clicking the **Recurrence** button to display the **Event Recurrence** dialog. For more information, please refer to the *Setting Up the School Diary* chapter of the *Setting Up and Administering SIMS* handbook.
7. Select the **Private** check box if the event is of a personal nature. This prevents other users from seeing the details of the event. The **Private** check box should not be used for normal school events. Any events that you mark as **Private** are only visible from your personal Home Page. Personal appointments and days off can be added to your individual **School Diary** view as reminders, etc.

- Click the **OK** button to save the event.

*NOTE: Once a school event has been added, it can be deleted only when the school diary is accessed via **Focus | School | School Diary**.*



Additional Resources:

Setting Up the School Diary chapter of the *Setting Up and Administering SIMS* handbook

Printing the School Diary

The content of the **School Diary** widget can be printed.

The printed output produces the view of the **School Diary** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **School Diary** widget prior to printing (please see *Refreshing the Content of the School Diary Widget* on page 42).

- Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser.



Options button

School Diary		
Date	Description	Category
05/03/2013 09:00 - 09:30	KS3 Weekly Assembly - Sports Hall	Assembly
06/03/2013 16:00 - 16:30	Department Meetings	Meeting
07/03/2013 16:00 - 17:30	SMT Meeting	Meeting
08/03/2013 09:00 - 09:30	KS4 Weekly Assembly - Main Hall	Assembly

- Click the **Print** button to print the diary events.

Refreshing the Content of the School Diary Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **School Diary** widget manually.

Click the **Refresh** button in the **School Diary** widget to refresh its content.



Refresh button

Viewing My Reminders

SIMS can be configured to generate a reminder to advise users of forthcoming deadlines, e.g. free school meal eligibility, medical events, SEN reviews, etc.

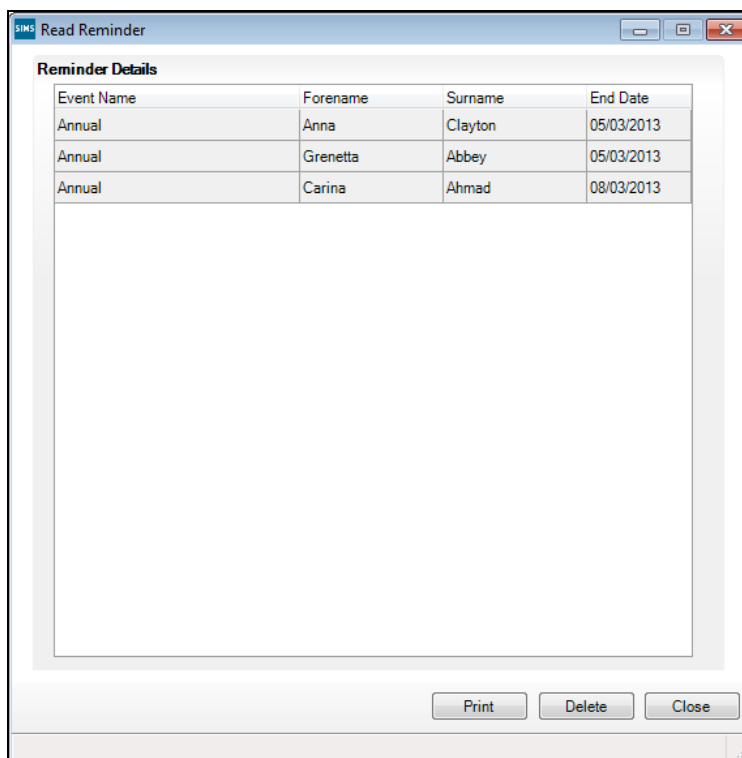
Each SIMS user can specify the reminders they want to set and the number of days prior to the event occurring that the reminder should be generated and sent to the applicable member(s) of staff. The reminders are displayed in the **My Reminders** widget on the SIMS **Home Page**. The date the reminder was **Sent**, the **Subject** line and the **Read** status is displayed. In the following example, a SEN review reminder has been sent.

My Reminders		
Read	Sent	Subject
☒	05/03/2013 08:39	SEN Review Due

*NOTE: If the number of reminders exceeds the number that can be displayed in the **My Reminders** widget, the **More** hyperlink enables access to the additional reminders in full screen mode.*

A maximum of 50 reminders can be displayed on your Home Page. Once this limit has been reached, you are prompted to delete existing reminders.

1. To view a reminder from the minimised **My Reminders** widget, click it to display the **Read Reminder** dialog. To access a bulletin from the maximised view of the **My Reminders** widget, highlight the required reminder then click the **Open** button to display the same dialog.

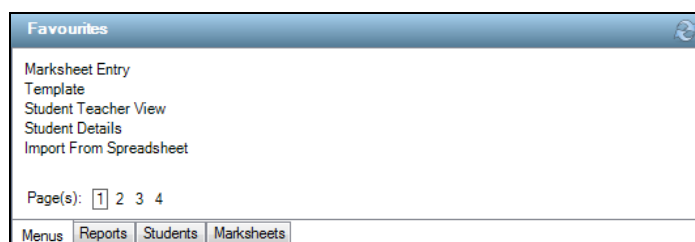


When used in conjunction with the **Subject** of the reminder displayed in the **My Reminders** panel, the **Event Name** informs you of the purpose of the reminder.

2. Double-click a summary line in the dialog to navigate to the area in SIMS and view the full record. In the case of the SEN review reminder used in this example, the **Student SEN details** page is displayed.
3. Close the detail page to return to the SIMS **Home Page**.
4. With the **Read Reminder** dialog open, you can **Print** or **Delete** the reminder.
5. Click the **Close** button to retain the reminder and to return to the SIMS **Home Page**.

Viewing My Favourites

To facilitate navigation in SIMS to areas that you visit most frequently, SIMS monitors and records the most commonly accessed functional areas and provides them as shortcuts via the **Favourites** widget.



The following categories of functionality in SIMS can be added as shortcuts automatically via the **Favourites** widget:

- Menus (added to the **Menus** tab automatically when you open a menu route in SIMS)
- Reports (added to the **Reports** tab automatically when you drag a SIMS pre-defined report to the Favourites folder via **Reports | Run Report**)
- Students (added to the **Students** tab automatically when you open a pupil/student's details via **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** then click the **Favourites** button)
- Marksheets (added to the **Marksheets** tab automatically when you open a marksheet via **Focus | Assessment | Marksheet Entry** then click the **Favourites** button).

Each of the tabs located at the bottom of the **Favourites** widget can display a maximum of five hyperlinks to functional areas in SIMS. Each tab can contain up to four pages, meaning that a maximum of 20 hyperlinks for each category can be stored. To view additional pages, click the appropriate **Page(s)** link. In the previous example, the **Menus** tab displays five hyperlinks on page 1 and provides four pages of links.

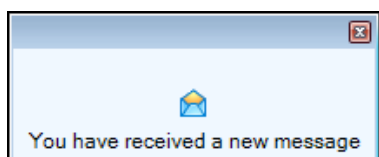
1. To open a shortcut, select the required tab (e.g. **Menus**) and click the required page (using the **Page(s)** links).
2. Either click the required shortcut or right-click it then select **Open '<shortcut name>'** to display the functional area.

The history of your navigation in SIMS can be removed by right-clicking any shortcut then selecting **Reset Counters** from the pop-up menu.

Viewing My Messages

All messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**. This includes system messages if a message that you have sent to another SIMS user cannot be delivered. The default refresh rate can be defined as part of the widget configuration process (please see *Configuring the My Messages Panel* on page 106).

By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.



In addition, an alarm is played by default when a high priority message is received.

1. Click a message in the **My Messages** widget to display its details in the **Read Message** dialog.
2. **Print** or **Delete** the message, if required.
3. Click the **Close** button to retain the message and to return to the SIMS **Home Page**.



More Information:

Sending General Messages on page 46

Viewing Sent Messages on page 49

Deleting Sent Messages on page 50

Responding to Messages on page 51

Adjusting the Message Options for High Priority Messages on page 53

Sending General Messages

Messages can be sent to one or more SIMS users, perhaps to inform them of a forthcoming event.

The type of message sent depends on the subject matter. For example, to send a message about a particular pupil/student, you can send a **Student General Message** from the **Links** panel in SIMS. Another type of message that can be sent is a **General** message. This type of message is not subject-specific, and should be used if existing message types (from the **Type** drop-down list in the **Message** panel of the **Send Message** dialog) are not appropriate. For example, you might want to send a message informing all heads of year of a forthcoming visit from a school inspector.

Once sent, the recipient can view messages in the **My Messages** panel of their Home Page.

1. Select **Focus | Alerts | General Messages** to display the **General Message** page.

- Click the **New** button to display the **Send Message** dialog.

The screenshot shows the 'Send Message' dialog box in the SIMS application. It has two main sections: 'Recipient' and 'Message'.

Recipient Section: Contains a 'Recipient Detail' panel with a 'Recipient Name' text box. To the right of this panel are two buttons: a green '+' icon labeled 'Add' and a '-' icon labeled 'Remove'.

Message Section: Contains several fields:

- 'Type': A dropdown menu currently showing 'General Message'.
- 'Priority': A dropdown menu currently showing 'Medium'.
- 'Date': A text box showing '06/03/2013 13:05'.
- 'Subject': A text box containing the word 'General'.
- 'Message': A large text area for composing the message body.

At the bottom right of the dialog are two buttons: 'Send' and 'Close'.

- Click the **Add** button in the **Recipient** panel to display the **Select Recipients** browser.

The screenshot shows the 'Select Recipients' dialog box in the SIMS application. It features a 'People Browse' section with search filters and a list of staff members.

Search Filters:

- 'Surname': An empty text box.
- 'Forename': An empty text box.
- 'Role': A dropdown menu currently showing '<ANY>'.

Staff List Table:

Title	Surname	Forename	Gender
Mrs	Abell	Anita	Female
Mrs	Andrews	Selina	Female
Mrs	Asher	Dawn	Female
Mr	Atkinson	John	Male
Miss	Batchley	Andrea	Female
Mr	Blacker	Adrian	Male
Mr	Brown	James	Male
Mr	Brown	Paul	Male
Miss	Burrows	Katie	Female
Miss	Burton	Fiona	Female

At the bottom of the dialog are three buttons: 'Add', 'OK', and 'Cancel'. Below the buttons, a status bar indicates 'Records found: 77'.

- Search for then highlight the required recipient (multiple recipients can be selected by either holding down the **Ctrl** key and clicking the required names, or holding the **Shift** key to select a block of recipients).
- Click the **Add** button to add each person (or group of people).
- When you have added the required member(s) of staff, click the **OK** button. The selected members of staff are displayed in the **Recipient** panel.

NOTE: To remove a member of staff, highlight their name in the **Recipient** panel then click the **Remove** button.

Recipient

Recipient Detail

Recipient Name

- Abell, Mrs Anita
- Andrews, Mrs Selina
- Asher, Mrs Dawn
- Atkinson, Mr John
- Batchley, Miss Andrea
- Blacker, Mr Adrian
- Brown, Mr James

+ Add

- Remove

In the **Message** panel, the **Type** field displays **General Message** and cannot be edited.

7. Select the **Priority** of the message from the drop-down list. High priority messages are displayed in a pop-up window in the bottom right-hand corner of the recipient's screen, if this setting has been activated (please see *Adjusting the Message Options for High Priority Messages* on page 53). The **Date** field is populated from a combination of the system date and time.
8. The **Subject** field displays **General** by default, but can be edited if required.
9. In the **Message** field, enter the message text that you want to send to the selected member(s) of staff.

Send Message

Recipient

Recipient Detail

Recipient Name

- Abell, Mrs Anita
- Andrews, Mrs Selina
- Asher, Mrs Dawn
- Atkinson, Mr John
- Batchley, Miss Andrea
- Blacker, Mr Adrian
- Brown, Mr James

+ Add

- Remove

Message

Type: General Message

Priority: Medium

Date: 06/03/2013 13:15

Subject: General

Message: Hi all
Just to let you know, the next visit from the inspector is on 25/03/13.

Send Close

When the required recipients have been selected and the **Message** field is populated, the **Send** button becomes available. To cancel the sending of the message, click the **Close** button.

- Click the **Send** button to send the message. The message is displayed in the **My Messages** panel of the intended recipient(s).

*NOTE: All sent messages are stored in the **Sent Items** panel of the **General Message** page until they are deleted.*



More Information:

Deleting Sent Messages on page 50

Viewing Sent Messages

All sent messages are stored in the **Sent Items** panel of the **General Message** page until they are deleted. It is possible to view and print the details of these messages.

- Select **Focus | Alerts | General Messages** to display the **General Message** page.

General Message						
Refresh Print						
Sent Items						
Recipient	Subject	Sent Date	Priority	Message Type	Read Status	
Anita,Abell; Seli...	General	06/03/2013 13:16	Medium	General Message	Unread	
Fiona,Burton	Grenetta Abbey Female Year 8 8F	25/02/2013 16:55	Medium	Student General Message	Unread	

New
Delete

The **Sent Items** panel displays all of the messages that you have sent, which you have elected to retain.

The **Read Status** column indicates if the message is currently **Unread**, **Read** (by some, but not all of the recipients) or **Read By All**.

2. Double-click a message to view its details in the **Sent Message** dialog.

Recipient Name	Read Status
Blacker, Mr Adrian	No
Brown, Mr James	No
Abell, Mrs Anita	No

The **Recipient(s)** panel displays all recipients of the message. The **Read Status** in this panel displays **Yes** if the recipient has read your message.

3. To print the message, click the **Print** button. Click the **OK** button to return to the **General Message** page.
4. To print all sent messages, click the **Print** button on the **General Message** page.

Deleting Sent Messages

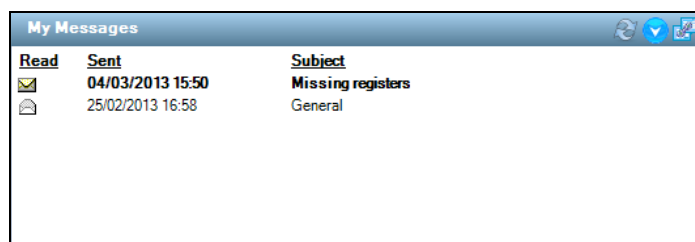
Any sent messages that you no longer need can be deleted.

WARNING: Deleted sent messages are removed permanently and there is no restore function. Any user to whom you have sent the message can still access it via the **My Messages** panel on their Home Page until they elect to delete it.

1. Select **Focus | Alerts | General Messages** to display the **General Message** page.
2. Highlight the required message(s) then click the **Delete** button. Multiple messages can be selected by holding the **Ctrl** key then clicking each message you wish to delete.
3. Confirm the deletion by clicking the **Yes** button.

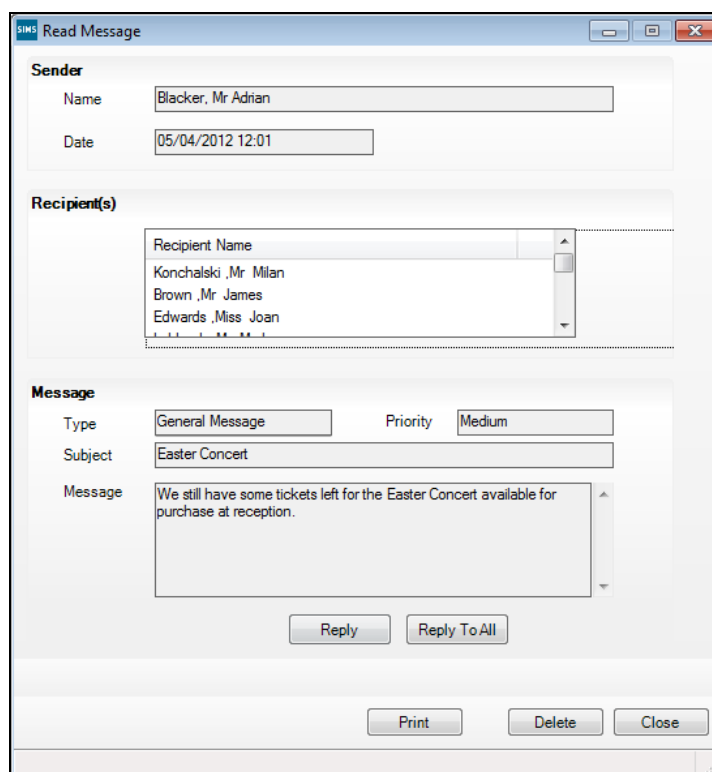
Responding to Messages

The six most recent messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**.



*NOTE: If the number of messages in your inbox exceeds the number that can be displayed in the **My Messages** widget, the **More** hyperlink enables access to the additional messages in full screen mode.*

1. Click anywhere on the required message line to display the content of the message in the **Read Message** dialog.



*NOTE: **Print** or **Delete** the message as required or click the **Close** button to retain the message and return to the SIMS **Home Page**.*

- To respond only to the sender of the message, click the **Reply** button to display the **Reply Message** dialog. Alternatively, click the **Reply To All** button to respond to all recipients of the original message, including the sender.

The screenshot shows the 'SIMS Reply Message' dialog box. It has three main sections: 'Sender', 'Recipient(s)', and 'Message'. In the 'Sender' section, the 'Name' field is 'Blacker, Mr Adrian' and the 'Date' is '05/04/2012 12:01'. The 'Recipient(s)' section has a list box with 'Blacker, Mr Adrian' and 'Add' and 'Delete' buttons. The 'Message' section has 'Type' set to 'General Message', 'Priority' set to 'Medium', and 'Subject' set to 'RE: Easter Concert'. The 'Message' text area contains: 'Mr Adrian Blacker Wrote : We still have some tickets left for the Easter Concert available for purchase at reception.' At the bottom are 'Send' and 'Close' buttons.

- Click the **Add** button in the **Recipient(s)** panel to display the **Select Recipients** browser.

The screenshot shows the 'SIMS Select Recipients' dialog box. It has a 'People Browse' section with 'Search' and 'Print' buttons. Below are input fields for 'Surname', 'Forename', and a 'Role' dropdown set to '<ANY>'. A table lists recipients with columns for Title, Surname, Forename, and Gender. At the bottom are 'Add', 'OK', and 'Cancel' buttons. A status bar at the bottom says 'Records found: 77'.

Title	Surname	Forename	Gender
Mrs	Abell	Anita	Female
Mrs	Andrews	Selina	Female
Mrs	Asher	Dawn	Female
Mr	Atkinson	John	Male
Miss	Batchley	Andrea	Female
Mr	Blacker	Adrian	Male
Mr	Brown	James	Male
Mr	Brown	Paul	Male
Miss	Burrows	Katie	Female
Miss	Burton	Fiona	Female

- Search for, then select the required recipient (multiple recipients can be selected by either holding down the **Ctrl** key and clicking the required names, or holding the **Shift** key to select a block of recipients).
- Click the **Add** button to add each person (or group of people).

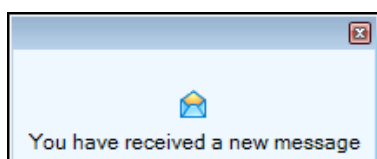
- When you have added the necessary members of staff, click the **OK** button. The selected members of staff are displayed in the **Recipient** panel.

*NOTE: To remove a member of staff, highlight them in the **Recipient** panel and click the **Remove** button.*

- Enter your reply in the **Message** panel and click the **Send** button to send the message.

Adjusting the Message Options for High Priority Messages

Any messages sent to you by other SIMS users are displayed in the **My Messages** panel on the **SIMS Home Page**. By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.



In addition, an alarm is played by default when a high priority message is received.

NOTE: Each SIMS user can define their own settings for when they receive a high priority message. The settings defined apply only to that user and only to messages received by that user. Therefore, if you send a high priority message to another SIMS user, the pop-up window displays on their screen only if the recipient has defined this setting.

- Select **Tools | Setup Message Options** to display the **Setup Message Options** page.

1 Options for high priority messages	
Display an alert when a new message is received	☒
The pop-up alert will be displayed for	30 seconds
Play a sound alarm	☒

By default, all the options are selected and the pop-up alert is displayed for 30 seconds

- Deselect the **Display an alert when a new message is received** check box to de-activate the pop-up display for high priority messages.

By default, the **Duration pop-up alert will be displayed for 30 seconds**. This determines the period of time that the pop-up message remains on-screen.

- To amend the length of time that the pop-up message is displayed, enter the required time, in seconds.

4. Deselect the **Play a sound alarm** check box to de-activate the sound prompt when the pop-up alert is displayed.

*NOTE: To receive the pop-up alerts for high priority messages, the **My Messages** widget must be displayed on your **Home Page**.*

Refreshing the Content of the My Messages Widget

Many of the widgets on the SIMS Home Page can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **My Messages** widget manually.

Click the **Refresh** button in the **My Messages** widget to refresh its content.



Refresh button

Viewing My Scheduled Reports

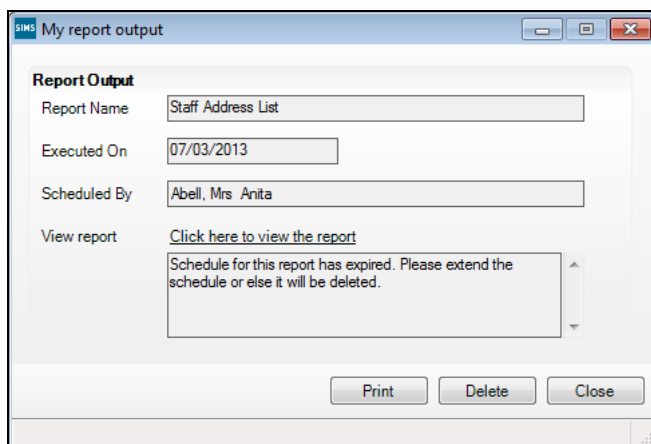
The **My Scheduled Reports** widget is used to display any reports that you have scheduled to run automatically at specified times. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any behaviour incidents. It is possible to schedule these reports to run for yourself and on behalf of other SIMS users.

Once generated, the reports are stored on the Document Management Server (DMS) and a link to the report is displayed in the **My Scheduled Reports** widget on the SIMS Home Page.

My Scheduled Reports		
<u>Read</u>	<u>Sent</u>	<u>Subject</u>
☒	07/03/2013 10:42	Staff Address List has been run as scheduled

*NOTE: If the number of scheduled reports that have been run exceeds the number that can be displayed in the **My Scheduled Reports** widget, the **More** hyperlink enables access to the additional reports in full screen mode.*

To access a report from the minimised **My Scheduled Reports** widget, click the name of the report to display the **My report output** dialog. To access a report from the maximised view of the **My Scheduled Reports** widget, highlight the required report then click the **Open** button to display the same dialog.



The **Report Name** and the date the report was **Executed On** are displayed, together with the name of the user who scheduled the report (**Scheduled By**).

To view the report output, click the **Click here to view the report** hyperlink to open the application associated with the selected report format, from where it can be printed.

Click the **Print** button to print the information in the dialog, if required. The notification can be deleted from the **My Scheduled Report** widget by clicking the **Delete** button.

Click the **Close** button to return to the SIMS **Home Page**.



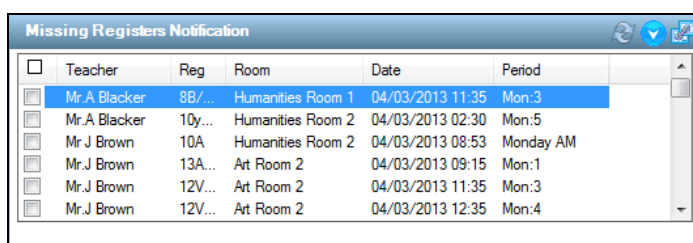
Additional Resources:

Running Scheduled Reports chapter of the *Designing and Running Reports* handbook

Viewing Missing Register Notifications

This section is applicable only to users with Attendance Manager permissions.

It is possible to display a list of registers that have not been completed within a specified number of minutes after a lesson or session starts. The period of time after which notifications will be displayed is defined as part of the widget configuration process (please see *Configuring the Missing Register Notification Panel* on page 107). It is also possible to access the registers to complete missing marks, if required.



☐	Teacher	Reg	Room	Date	Period
☐	Mr A Blacker	8B/...	Humanities Room 1	04/03/2013 11:35	Mon:3
☐	Mr A Blacker	10y...	Humanities Room 2	04/03/2013 02:30	Mon:5
☐	Mr J Brown	10A	Humanities Room 2	04/03/2013 08:53	Monday AM
☐	Mr J Brown	13A...	Art Room 2	04/03/2013 09:15	Mon:1
☐	Mr J Brown	12V...	Art Room 2	04/03/2013 11:35	Mon:3
☐	Mr J Brown	12V...	Art Room 2	04/03/2013 12:35	Mon:4

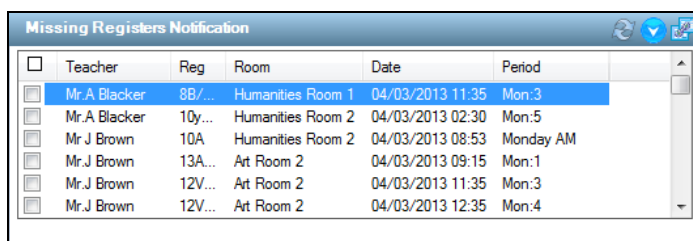
The **Missing Registers Notification** widget displays any registers that have not been completed after a defined period of time (e.g. 10 minutes after a lesson or session starts). Any missing or incomplete register is displayed in this panel. The panel displays details of the registration tutor/class teacher, the session or lesson, the room, date and period.

This functionality enables a Head of Year (with Attendance Manager permissions), for example, to identify any sessions or lessons that have not had their registration taken within the required time period. The Head of Year can then send a message to all members of staff who have not yet completed their register.

IMPORTANT NOTE: By default, the content of the **Missing Registers Notification** panel is refreshed automatically by SIMS every ten minutes. This means that if missing register notifications are set to be sent ten minutes after a lesson or session starts, the delay before the **Missing Registers Notification** panel displays this information may be up to twenty minutes after the lesson or session starts. It is important to bear this in mind when setting the notification delay.

Opening a Register and Entering Marks

It is possible to open the registers displayed in the **Missing Registers Notification** widget, perhaps if you want to complete missing marks.



☐	Teacher	Reg	Room	Date	Period
☐	Mr A Blacker	8B/...	Humanities Room 1	04/03/2013 11:35	Mon:3
☐	Mr A Blacker	10y...	Humanities Room 2	04/03/2013 02:30	Mon:5
☐	Mr J Brown	10A	Humanities Room 2	04/03/2013 08:53	Monday AM
☐	Mr J Brown	13A...	Art Room 2	04/03/2013 09:15	Mon:1
☐	Mr J Brown	12V...	Art Room 2	04/03/2013 11:35	Mon:3
☐	Mr J Brown	12V...	Art Room 2	04/03/2013 12:35	Mon:4

Double-click the required register in the **Missing Registers Notification** widget to display the **Take Register** page.

Take Register 11A/Fr1 Mr. M Konchalski 06/03/2013									
Save Undo Print Refresh Codes Preserve Extra Name Class Photo Minutes Late Comments Links									
Current View ☐ History ☒ Today ☐ Future Present 0									
Name	Reg	AM	Wed:1	Wed:2	Wed:3	Wed:4	PM	Wed:5	
Binning, Darren	11F	/	-	-	-	-	\	-	
Collier, Richard	11D	u	u	u	u	u	\	-	
Collins, Kerry	11F	/	-	-	-	-	\	-	
Duncan, Joanna	11D	/	-	-	-	-	\	-	
East, Alison	11C	/	-	-	-	-	\	-	
Evans, Aaron	11D	/	-	-	-	-	\	-	
Evergreen, Thomas	11F	/	-	-	-	-	\	-	
Frost, Tobin	11D	/	-	-	-	-	\	-	
Gatehead, Micheal	11E	/	-	-	-	-	\	-	
Harris, Rikki	11B	/	-	-	-	-	\	-	
Ho, Lisa	11F	/	-	-	-	-	\	-	
Holt, Siena	11B	/	-	-	-	-	\	-	
Liddel, Peter	11A	/	-	-	-	-	\	-	
Lowry, Mike	11F	/	-	-	-	-	\	-	
Raggobeer, Odee	11B	/	-	-	-	-	\	-	
Trunley, Wendy	11C	/	-	-	-	-	\	-	



Additional Resources:

Taking a Register chapter in the *Managing Pupil/Student Attendance* handbook

Taking a Register chapter in the *Monitoring Session and Lesson Attendance* handbook

Printing Missing Register Notifications

The content of the **Missing Registers Notification** widget can be printed.

The printed output produces the view of the **Missing Registers Notification** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **Missing Registers Notifications** widget prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the notifications in your web browser.



Options button

Missing Registers Notification				
Reg Tutor/Class Teacher	Register	Room	Date	Session/Lesson
Mr.A Blacker	8B/Re	Humanities Room 1	04/03/2013 11:35:00	Mon:3
Mr.A Blacker	10y/Re3	Humanities Room 2	04/03/2013 14:30:00	Mon:5
Mr J Brown	10A	Humanities Room 2	04/03/2013 08:53:00	Monday AM
Mr.J Brown	13A/Te1	Art Room 2	04/03/2013 09:15:00	Mon:1
Mr.J Brown	12V1/It1	Art Room 2	04/03/2013 11:35:00	Mon:3
Mr.J Brown	12V1/It1	Art Room 2	04/03/2013 12:35:00	Mon:4
Mr J Brown	10A	Humanities Room 2	04/03/2013 14:08:00	Monday PM
Mr.J Brown	10y/Re2	Art Room 2	04/03/2013 14:30:00	Mon:5
Miss.J Edwards	13A/De1	Business Studies 1	04/03/2013 09:15:00	Mon:1
Miss.J Edwards	13B/He1	Business Studies 1	04/03/2013 10:15:00	Mon:2
Miss.J Edwards	13C/Ec1	Business Studies 1	04/03/2013 11:35:00	Mon:3
Miss.J Edwards	13C/Ec1	Business Studies 1	04/03/2013 12:35:00	Mon:4
Miss.J Edwards	12A/Ma2	Business Studies 1	04/03/2013 14:30:00	Mon:5
Mr.A Pinkney	7D/Re	Humanities Room 5	04/03/2013 09:15:00	Mon:1
Mr.A Pinkney	11y/Hi2	Humanities Room 5	04/03/2013 10:15:00	Mon:2
Mr.A Pinkney	13C/Hi1	Humanities Room 5	04/03/2013 11:35:00	Mon:3
Mrs.E Paton	7B/Hi	Humanities Room 4	04/03/2013 11:35:00	Mon:3
Mrs.E Paton	11x/Hi2	Humanities Room 4	04/03/2013 12:35:00	Mon:4
Mr.A Simmons	10C/Gg1	Humanities Room 1	04/03/2013 10:15:00	Mon:2

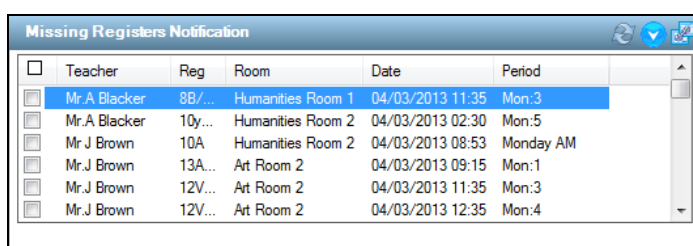
2. Click the **Print** button to print the notifications.

Sending a Missing Register Notification Message

This section is applicable only to users with Attendance Manager permissions.

The **Missing Registers Notification** widget enables a Head of Year (with Attendance Manager permissions), for example, to identify any sessions or lessons that have not had their register taken within the required time period. The Head of Year can then send a high priority message to all members of staff who have not yet completed their register, prompting them to do so.

The period of time after which notifications will be displayed in the **Missing Registers Notification** widget is defined as part of the widget configuration process (please see *Configuring the Missing Register Notification Panel* on page 107).



☐	Teacher	Reg	Room	Date	Period
☐	Mr A Blacker	8B/...	Humanities Room 1	04/03/2013 11:35	Mon:3
☐	Mr A Blacker	10y...	Humanities Room 2	04/03/2013 02:30	Mon:5
☐	Mr J Brown	10A	Humanities Room 2	04/03/2013 08:53	Monday AM
☐	Mr J Brown	13A...	Art Room 2	04/03/2013 09:15	Mon:1
☐	Mr J Brown	12V...	Art Room 2	04/03/2013 11:35	Mon:3
☐	Mr J Brown	12V...	Art Room 2	04/03/2013 12:35	Mon:4

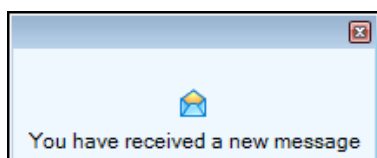
1. Select the check box relating to the register(s) for which you want to send the notification message. Alternatively, select the check box in the header row to select all missing registers displayed in the **Missing Registers Notification** widget.
2. Click the **Options** button then select **Send Message** from the pop-up menu to display the notifications in your web browser.



Options button

If the message has been sent successfully, a message is displayed at the bottom of the **Missing Registers Notification** widget.

The recipient can view the notification via the **My Messages** widget on the SIMS **Home Page**. By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.



In addition, an alarm is played by default when a high priority message is received.

NOTE: Each SIMS user can define their own settings for when they receive a high priority message. The settings defined apply only to that user and only to messages received by that user. Therefore, if you send a high priority message to another SIMS user, the pop-up window displays on their screen only if the recipient has defined this setting.



More Information:

Adjusting the Message Options for High Priority Messages on page 53

Refreshing the Content of the Missing Registers Notification Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **Missing Registers Notifications** widget manually.

Click the **Refresh** button in the **Missing Registers Notifications** widget to refresh its content.



Refresh button

Viewing My Detention Sessions

Any detention sessions for which you are the main staff member assigned are displayed in the **My Detention Sessions** widget. The period over which data is displayed (e.g. **Today**, **Current Week**, etc.) is defined as part of the widget configuration process (please see *Configuring the My Detention Sessions Panel* on page 108).

My Detention Sessions				
Date	Start Time	End Time	Location	Main Staff Code
05/03/2013	15:30	16:30	H1	AA

Click the required detention session to display its details on the **Detention Details** page.



Additional Resources:

Adding/Editing Detentions in the *Recording Detentions* chapter of the *Managing Pupil/Students* handbook

Printing My Detention Sessions

The content of the **My Detention Sessions** widget can be printed.

The printed output produces the view of the **My Detention Sessions** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **My Detention Sessions** widget and ensure the correct scope (e.g. **Today**, **Current Week**, etc.) is selected prior to printing (please see *Refreshing the Content of the School Diary Widget* on page 42).

1. Click the **Options** button then select **Print** from the pop-up menu to display the detention sessions in your web browser.



Options button

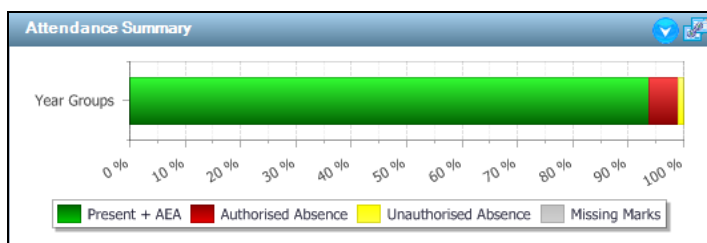
My Detention Sessions				
Date	Start Time	End Time	Location	Main Staff Code
05/03/2013	15:30	16:30	H1	AA

2. Click the **Print** button to print the detention sessions.

Viewing the Attendance Summary

A summary of pupil/student attendance can be displayed in the **Attendance Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress. The attendance information displayed is defined as part of the widget configuration process (please see *Configuring the Attendance Summary Panel* on page 109).

The following example shows the **Attendance Summary** widget when all **Year Groups** have been selected.

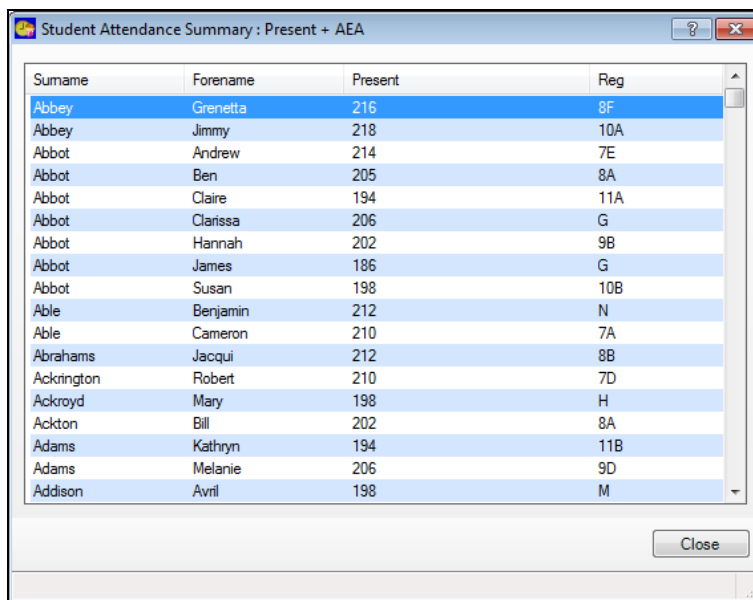


Pupil/student attendance for the selected group(s) over the course of the current academic year is displayed on a vertical bar chart. The legend beneath the chart displays the scope of the chart, which is the display of all **Present + AEA** (Authorised Educational Activity) marks, together with **Authorised** and **Unauthorised** absences and **Missing Marks**. The horizontal axis displays the cumulative percentage of these marks, starting with a green bar (for present marks), a yellow bar (authorised absences) and a red bar (unauthorised absences).

The percentage attendance figure is calculated as follows:

**Percentage Attendance = <number of present marks> plus
<number of approved educational absence marks> divided by
<number of possible marks>**

Hover the mouse over the bar to display the number and percentage of sessions or lessons in each category. To view the data that makes up the present, authorised or unauthorised bars on the chart, double-click the required bar to display the **Student Attendance Summary** dialog. In the following graphic, the **Present + AEA** (green) bar was selected to display the **Student Attendance Summary: Present + AEA** dialog.



Surname	Forename	Present	Reg
Abbey	Grenetta	216	8F
Abbey	Jimmy	218	10A
Abbot	Andrew	214	7E
Abbot	Ben	205	8A
Abbot	Claire	194	11A
Abbot	Clarissa	206	G
Abbot	Hannah	202	9B
Abbot	James	186	G
Abbot	Susan	198	10B
Able	Benjamin	212	N
Able	Cameron	210	7A
Abrahams	Jacqui	212	8B
Ackrington	Robert	210	7D
Ackroyd	Mary	198	H
Ackton	Bill	202	8A
Adams	Kathryn	194	11B
Adams	Melanie	206	9D
Addison	Avril	198	M

The number of present and authorised educational activity marks (or authorised or unauthorised absence marks, depending on the part of the bar chart that was selected) is displayed. You can access more specific data by right-clicking the required pupil/student then selecting **Student Teachers View** or **Student Attendance Summary** from the pop-up menu.



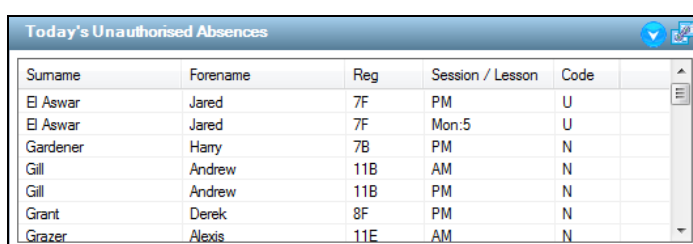
Additional Resources:

Configuring and Using the Student Teacher View mini guide
Displaying Marks chapter of the *Managing Pupil/Student Attendance* handbook
Displaying Marks chapter of the *Monitoring Session and Lesson Attendance* handbook

The data used to build the unauthorised absence part of the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.



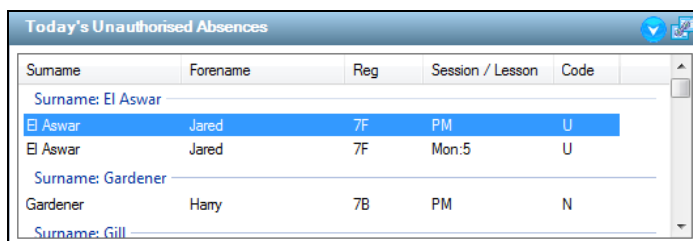
Options button



Surname	Forename	Reg	Session / Lesson	Code
El Aswar	Jared	7F	PM	U
El Aswar	Jared	7F	Mon:5	U
Gardener	Harry	7B	PM	N
Gill	Andrew	11B	AM	N
Gill	Andrew	11B	PM	N
Grant	Derek	8F	PM	N
Grazer	Alexis	11E	AM	N

The data displays unauthorised absences recorded for today only. The **Session / Lesson** for which an unexplained absence mark has been recorded and the actual mark recorded (**Code**) are displayed for each pupil/student. Where multiple session/lessons have been recorded for a pupil/student, a new line is displayed for each session/lesson.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Today's Unauthorised Absences** widget then select **Surname, Forename, Reg, Session / Lesson** or **Code** from the pop-up menu to display the content in the selected order.



Surname	Forename	Reg	Session / Lesson	Code
Surname: El Aswar				
El Aswar	Jared	7F	PM	U
El Aswar	Jared	7F	Mon:5	U
Surname: Gardener				
Gardener	Harry	7B	PM	N
Surname: Gill				

Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

IMPORTANT NOTES: Authorised educational activity marks are treated as a present mark in the **Attendance Summary** widget on the **SIMS Home Page**.

If a mark is entered in Take Register for a future session or lesson, this is included in the figures in the **Attendance Summary** widget.

Printing the Attendance Summary

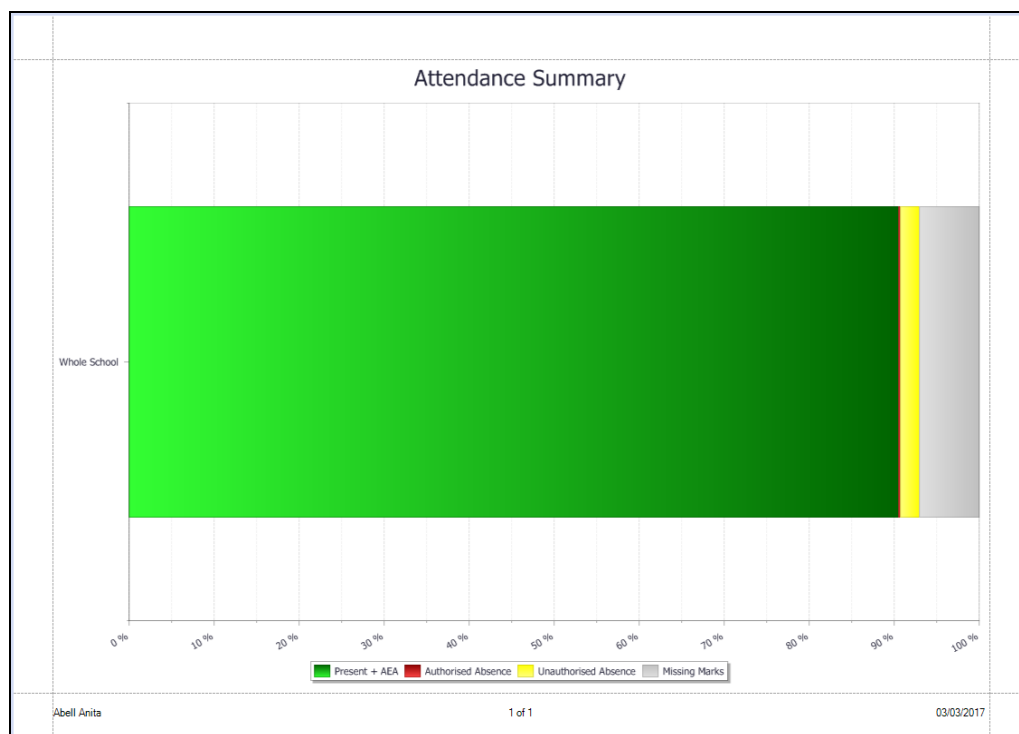
Two printed outputs are available from this widget. With the **Attendance Summary** displayed, the bar chart is printed. With **Today's Unauthorised Absences** displayed, the data is printed in surname then forename order, regardless of the display order on-screen.

Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser, from where it can be printed.



Options button

Attendance Summary bar chart output:



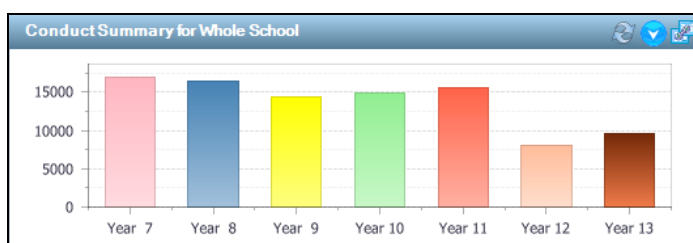
Today's Unauthorised Absences output:

Attendance Summary				
Surname	Forename	Reg. Group	Session / Lesson	Code
Aaron	Chris	3CB	PM	N
Aaron	Chris	3CB	AM	N
Aaron	Liz	3CB	AM	N
Aaron	Liz	3CB	PM	N
Adasheji	Mohammed	3CB	PM	N
Adasheji	Mohammed	3CB	AM	N
Americana	Kari	5DT	AM	N
Americana	Kari	5DT	PM	N
Amoso	Silv	6KH	PM	N
Amoso	Silv	6KH	AM	N
Amoso	Stephanie	6KH	PM	N
Amoso	Stephanie	6KH	AM	N
Atkinson	Ben	6KH	PM	N
Atkinson	Ben	6KH	AM	N
Avatar	Ahman	3CB	AM	N
Avatar	Ahman	3CB	PM	N
Ballinger	Eden	5BB	PM	N
Ballinger	Eden	5BB	AM	N
Brown	Jeremy	6KH	PM	N
Brown	Jeremy	6KH	AM	N
Carlin	Tayla	6KH	AM	N
Carlin	Tayla	6KH	PM	N
DiMonaco	Silvana	OAK	PM	N
DiMonaco	Silvana	OAK	AM	N
Douglas	David	6KH	PM	N
Douglas	David	6KH	AM	N
Fell	Mia	3CB	PM	N
Fell	Mia	3CB	AM	N
Francis	Adam	2GH	AM	N
Francis	Adam	2GH	PM	N

Viewing the Conduct Summary

A summary of pupil/student conduct can be displayed in the **Conduct Summary** widget on the SIMS **Home Page**, enabling the monitoring of behaviour and achievement. The conduct information displayed, together with the period over which data is displayed (e.g. **Year to Date**, **Previous Week**, etc.), is defined as part of the widget configuration process (please see *Configuring the Conduct Summary Panel* on page 112).

The previous example shows the **Conduct Summary** widget when the **Whole School** has been selected for the **Previous Term**.



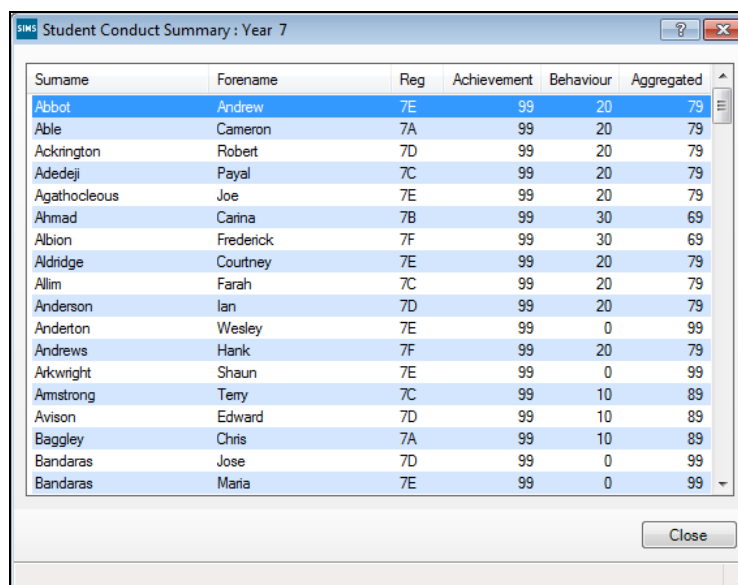
The data in the chart consists of the aggregate of the points awarded for behaviour incidents (awarded a negative points value) and achievements (awarded a positive points value). Where the points awarded for achievements exceeds the points awarded for behaviour incidents, this indicates generally positive conduct for the group and the bar is displayed above the horizontal axis (i.e. a points aggregate of greater than 0).

The scope of the **Conduct Summary** widget determines the style of the bar chart. In the previous graphic, the vertical axis starts at zero and the last marker is at 15000. All of the bars on the chart are within the range 0 to 15000 so this indicates generally positive conduct.

If the scope of the widget was reduced to display conduct for a single day (**Today** or **Previous Day**), one of the groups that you are monitoring (perhaps a specific registration group) might display a negative aggregate score (the points awarded for behaviour incidents exceeds the points awarded for achievements). Under these circumstances, the bar would be displayed below the horizontal axis (i.e. a points aggregate of less than 0) to indicate generally negative conduct.

Hover the mouse over a bar to display the number of conduct points for the selected group(s). The information displayed differs depending on the groups selected. For example, if you have chosen a **Whole School** view, hovering the mouse over a bar displays the aggregate conduct points for each year group. Hovering the mouse over a bar on the widget where you have chosen to display a single year group displays (in a secondary school) the aggregate conduct points for each registration group in the year.

To view the data that makes up a bar displayed in the widget, double-click the required bar to display the **Pupil (or Student) Conduct Summary** dialog. In the following graphic, the **Year 7** bar was selected to display the **Pupil (or Student) Conduct Summary: Year 7** dialog.



Surname	Forename	Reg	Achievement	Behaviour	Aggregated
Abbot	Andrew	7E	99	20	79
Able	Cameron	7A	99	20	79
Ackrington	Robert	7D	99	20	79
Adedeji	Payal	7C	99	20	79
Agathocleous	Joe	7E	99	20	79
Ahmad	Carina	7B	99	30	69
Albion	Frederick	7F	99	30	69
Aldridge	Courtney	7E	99	20	79
Allim	Farah	7C	99	20	79
Anderson	Ian	7D	99	20	79
Anderton	Wesley	7E	99	0	99
Andrews	Hank	7F	99	20	79
Arkwright	Shaun	7E	99	0	99
Armstrong	Terry	7C	99	10	89
Avison	Edward	7D	99	10	89
Baggley	Chris	7A	99	10	89
Bandaras	Jose	7D	99	0	99
Bandaras	Maria	7E	99	0	99

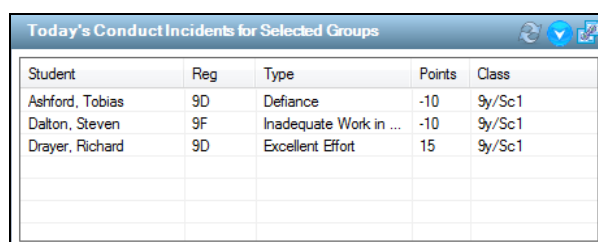
The number of **Achievement** and **Behaviour** points are displayed for each pupil/student in the selected group, together with an **Aggregated** figure. The **Aggregated** figure equals the number of **Achievement** points minus the number of **Behaviour** points.

You can access more specific data by right-clicking the required pupil/student then selecting **Student Teachers View** or **Student Conduct Summary** (which displays its details on the **Behaviour Management** page) from the pop-up menu. Alternatively, click the **Close** button to return to the SIMS **Home Page**.

The view of the data on the **Conduct Summary** widget can be toggled between a bar chart and a data table that displays **Today's Conduct Incidents for Selected Groups** (behaviour incidents and achievements) by clicking the **Options** button then selecting **Toggle** from the drop-down menu.



Options button

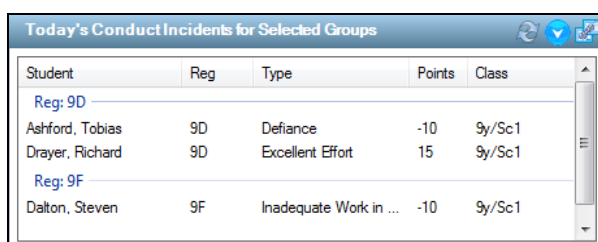


Student	Reg	Type	Points	Class
Ashford, Tobias	9D	Defiance	-10	9y/Sc1
Dalton, Steven	9F	Inadequate Work in ...	-10	9y/Sc1
Drayer, Richard	9D	Excellent Effort	15	9y/Sc1

The data displays pupil/student conduct information recorded today only. The **Type** of conduct that has been recorded is displayed for each pupil/student. The **Class** column displays the class in which the incident took place. Where multiple conduct details have been recorded for a pupil/student, a new line is displayed for each conduct item.

To view further information about a conduct incident, double-click the required item to display the **Pupil/Student Teacher View** page.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Today's Conduct Incidents for Selected Groups** view of the **Conduct Summary** widget, then select **Pupil** (or **Student**), **Reg**, **Type**, **Points** or **Class** from the pop-up menu to display the content in the selected order.



Student	Reg	Type	Points	Class
Reg: 9D				
Ashford, Tobias	9D	Defiance	-10	9y/Sc1
Drayer, Richard	9D	Excellent Effort	15	9y/Sc1
Reg: 9F				
Dalton, Steven	9F	Inadequate Work in ...	-10	9y/Sc1

Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.



Additional Resources:

Recording Behaviour Incidents chapter of the *Managing Pupil/Students* handbook

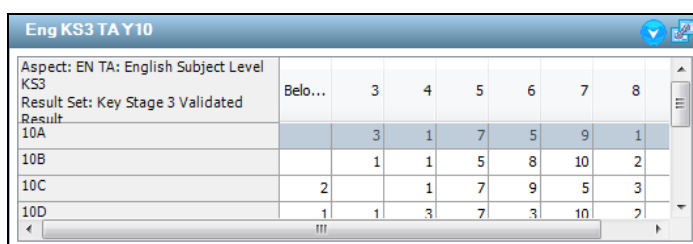
Recording Achievements chapter of the *Managing Pupil/Students* handbook

Configuring and Using the Student Teacher View mini guide

Viewing the Assessment Summary

A summary of pupil/student assessments can be displayed in the **Assessment Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress. The assessment information displayed is defined as part of the widget configuration process (please see *Configuring the Assessment Summary Panel* on page 115).

The following example shows the **Assessment Summary** widget when the EN TA: English Subject Level KS3 aspect and all the registration groups in year 10 are selected.



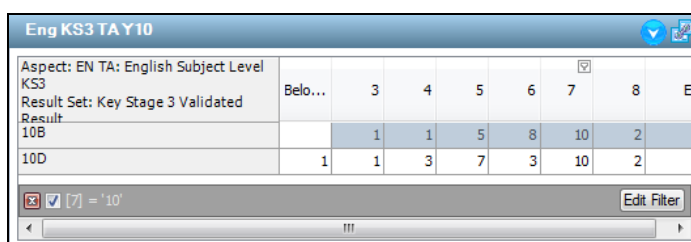
Aspect: EN TA: English Subject Level KS3 Result Set: Key Stage 3 Validated Result	Belo...	3	4	5	6	7	8
10A		3	1	7	5	9	1
10B		1	1	5	8	10	2
10C	2		1	7	9	5	3
10D	1	1	3	7	3	10	2

TIP: If you have selected to display more than three groups, or if you have selected an aspect with more than seven grades, you are advised to view the data in full screen mode.

The widget name is renamed according to the selected analysis.

The sort order of the Assessment Summary widget can be changed by clicking the required column header.

A filter can be applied to the data to display specific results. In the previous graphic for example, registration groups with 10 pupil/students who have achieved a grade 7 for the selected aspect can be displayed by hovering over the grade 7 column heading, clicking the **Filter** icon that is displayed in the top-right hand corner of the column heading (as displayed in the following graphic) then selecting **10** from the list.



Aspect: EN TA: English Subject Level KS3	Result Set: Key Stage 3 Validated	3	4	5	6	7	8	9	10
10B		1	1	5	8	10	2		
10D		1	1	3	7	3	10	2	

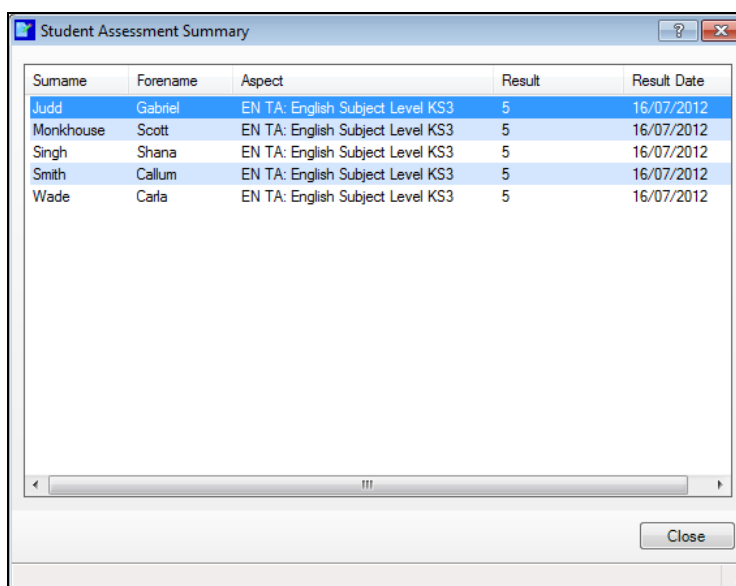
Filter: [7] = '10'



Additional Resources:

For full instruction on adding, editing and removing filters, please refer to *Using the Filter Editor* in the *Entering and Reviewing Data using Marksheetworks* chapter of the *Administering Assessment* handbook.

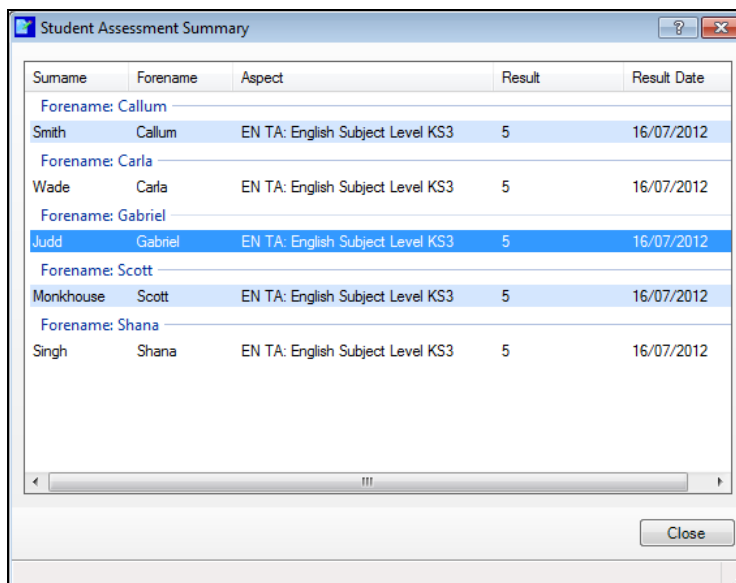
You can see which pupil/students have achieved a particular grade by double-clicking the required grade cell to display the **Student Assessment Summary** dialog.



Surname	Forename	Aspect	Result	Result Date
Judd	Gabriel	EN TA: English Subject Level KS3	5	16/07/2012
Monkhouse	Scott	EN TA: English Subject Level KS3	5	16/07/2012
Singh	Shana	EN TA: English Subject Level KS3	5	16/07/2012
Smith	Callum	EN TA: English Subject Level KS3	5	16/07/2012
Wade	Carla	EN TA: English Subject Level KS3	5	16/07/2012

Close

This information can be viewed in a variety of display orders. Right-click anywhere in the dialog then select **Surname**, **Forename**, **Aspect**, **Result** or **Result Date** from the pop-up menu to display the content in the selected order.



Surname	Forename	Aspect	Result	Result Date
Forename: Callum				
Smith	Callum	EN TA: English Subject Level KS3	5	16/07/2012
Forename: Carla				
Wade	Carla	EN TA: English Subject Level KS3	5	16/07/2012
Forename: Gabriel				
Judd	Gabriel	EN TA: English Subject Level KS3	5	16/07/2012
Forename: Scott				
Monkhouse	Scott	EN TA: English Subject Level KS3	5	16/07/2012
Forename: Shana				
Singh	Shana	EN TA: English Subject Level KS3	5	16/07/2012

Revert to the original display by right-clicking anywhere in the dialog then selecting **Hide Groups** from the pop-up menu.

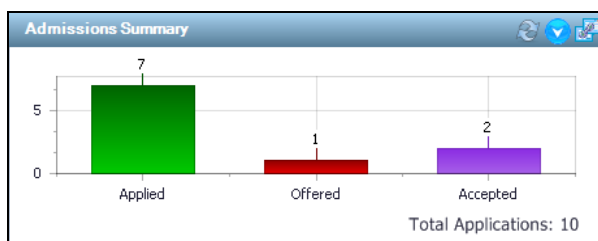
Double-click the required pupil/student to view more specific data and to display their **Pupil (or Student) Teacher View** page.

Click the **Close** button to return to the SIMS Home Page.

Viewing the Admissions Summary

A summary of your applicants by **Application Status** can be displayed in the **Admissions Summary** widget on the SIMS Home Page, enabling a quick overview of the figures in bar chart format. The admissions information displayed is defined as part of the widget configuration process (please see *Configuring the Admissions Summary Panel* on page 116). This is a multi-use panel, i.e. you can have several **Admissions Summary** widgets displaying different information on the SIMS Home Page.

The following graphic shows an example of a populated **Admissions Summary** widget.



*NOTE: Schools with relevant licences can also display **Prospective Pupils** (or **Students**) or **Enquiries**.*

The horizontal axis displays the different admission statuses, while the vertical axis displays the numbers.

A **Total Applications** number is also displayed, which is the sum of the **Applied**, **Offered** and **Accepted** application statuses. This figure does not include **Prospective Pupils** (or **Students**) or **Enquiries**.

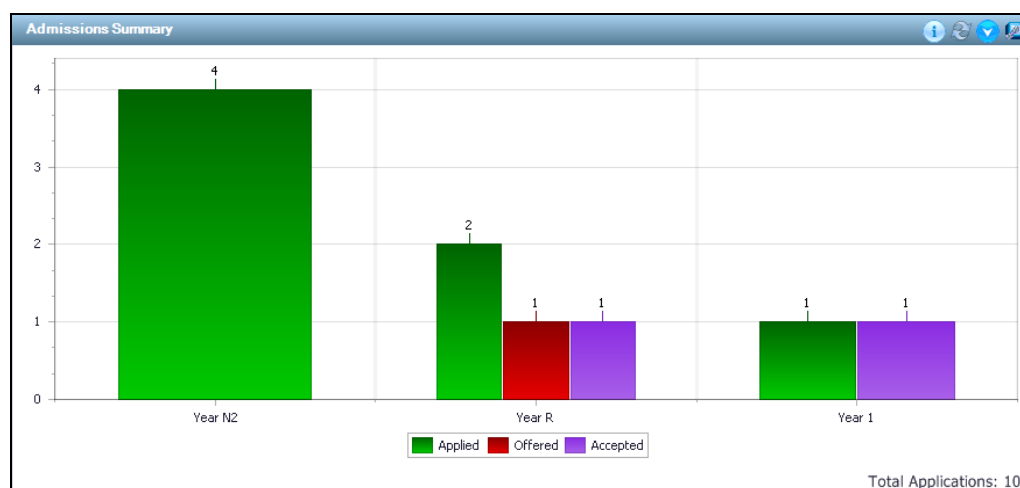
Clicking the **Options** button, then selecting **Toggle** from the drop-down menu enables you to turn the comparison view on and off, so that you can see the variation in application numbers between two time periods.

NOTE: The Toggle feature is enabled only if a comparison period has been selected in the Configuration Settings (please see Configuring the Admissions Summary Panel on page 116).

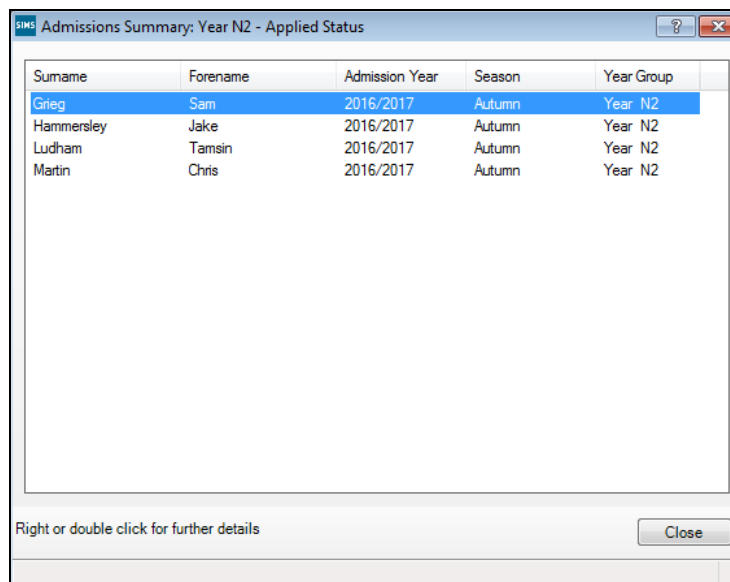


Options button

An expanded chart can be viewed, which displays application statuses by year group and, like the collapsed view, can be toggled to the comparison view.



Hovering the cursor over each bar displays the number of each application status. Double-clicking a bar in the chart displays the **Admissions Summary** dialog, which gives details of the applicants in that category. Double-click an applicant's name to display the **Application** page, where more in-depth information about the selected application is displayed. If you have the required licences, the same can be achieved for **Enquiries** and **Projected Pupils** (or **Students**).



Surname	Forename	Admission Year	Season	Year Group
Grieg	Sam	2016/2017	Autumn	Year N2
Hammersley	Jake	2016/2017	Autumn	Year N2
Ludham	Tamsin	2016/2017	Autumn	Year N2
Martin	Chris	2016/2017	Autumn	Year N2

Right or double click for further details

Close

Printing the Admissions Summary

The content of the **Admissions Summary** widget can be printed.

The printed output produces the view of the **Admissions Summary** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **Admissions Summary** widget and ensure the correct scope (e.g. **Whole school**, **Years 2 and 3**, etc.) is selected prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display a **Print Preview** of your chart.



Options button

2. Select **File | Print** to select your preferences, then click the **Print** button.

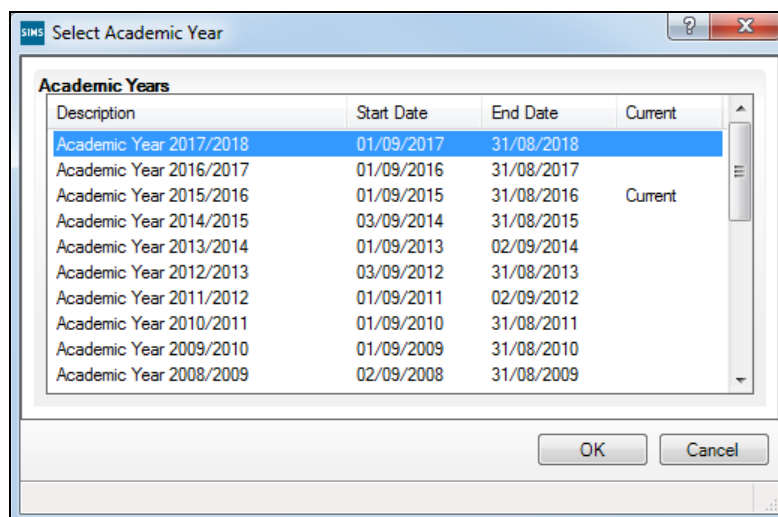
Changing the Displayed Academic Year

To help prepare for the next academic year, it is possible to view the displayed academic year on the SIMS **Home Page** with the appropriate permissions. It is also possible to change the academic year from here.

The currently selected academic year is displayed adjacent to the **Quick Search** bar.



1. Click the **Selected Academic Year** hyperlink to display the **Select Academic Year** dialog.



2. Select the required **Academic Year**, then click the **OK** button.
A confirmation dialog is displayed. You are not required to restart SIMS.

Increasing the Size of Panels on the Home Page

All of the panels on the SIMS **Home Page** (with the exception of the **Favourites** panel) can be expanded to display their content in full screen mode. This is particularly useful if a panel contains a lot of information, which may be difficult to read in the default view.

Click the **Expand** button to maximise the required panel to full screen mode.

Once maximised, the panel can be reduced to its original size by clicking the **Restore** button.



Expand button



Restore button

If a panel is expanded when you exit SIMS, it will be restored to its original size the next time you log into SIMS.

Setting Panel Refresh Rates

The content of the widgets on the SIMS **Home Page** refresh automatically after a defined period of time. Each of the widgets refresh at a different rate. When a widget is refreshing, the **Panel Refreshing** icon (located in the bottom right-hand corner of the widget) rotates.



Panel Refreshing icon

A number of the widgets can be refreshed manually, in case you wish to view updated content between automatic refreshes. The display of the **Refresh** icon (displayed in the top right-hand corner of a widget) indicates whether or not a widget can be refreshed manually.



Refresh icon

Click the **Refresh** icon to update the content of the widget.

The following widgets can be refreshed manually:

- My Timeline
- School Diary
- Favourites
- My Messages
- Conduct Summary
- Missing Registers Notification
- Admissions Summary

The refresh rate for the following widgets can be set:

- My Timeline widget (please see *Configuring the My Timeline Panel* on page 103). By default, this widget refreshes every 15 minutes.
- School Diary widget (please see *Configuring the School Diary Panel* on page 105). By default, this widget refreshes every 8 minutes.
- My Messages widget (please see *Configuring the My Messages Panel* on page 106). By default, this widget refreshes every 5 minutes.
- Conduct Summary widget (please see *Configuring the Conduct Summary Panel* on page 112). By default, this widget refreshes every 12 minutes.
- Missing Registers Notification widget (please see *Configuring the Missing Register Notification Panel* on page 107). By default, this widget refreshes every 10 minutes.
- Admissions Summary widget (please see *Configuring the Admissions Summary Panel* on page 116). By default, this widget refreshes every 15 minutes.
- Attendance Summary (Administrator only)
- School Messages (Administrator only)

The default for the following is set by SIMS and cannot be amended:

- School Bulletins
- My Reminders
- Favourites
- Assessment Summary
- My Scheduled Reports
- My Detention Sessions.

Scheduling Reports to Run Automatically

Scheduled reports can be set up to run automatically at a specified time. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any recorded behaviour incidences. It is possible to schedule reports to run for both yourself and on behalf of other users.

Once created, the reports are stored on the Document Management Server and a link to the report is displayed in the **My Scheduled Reports** panel on your SIMS **Home Page**.

For these reports to run, a Windows Scheduled Task must be created.



Additional Resources:

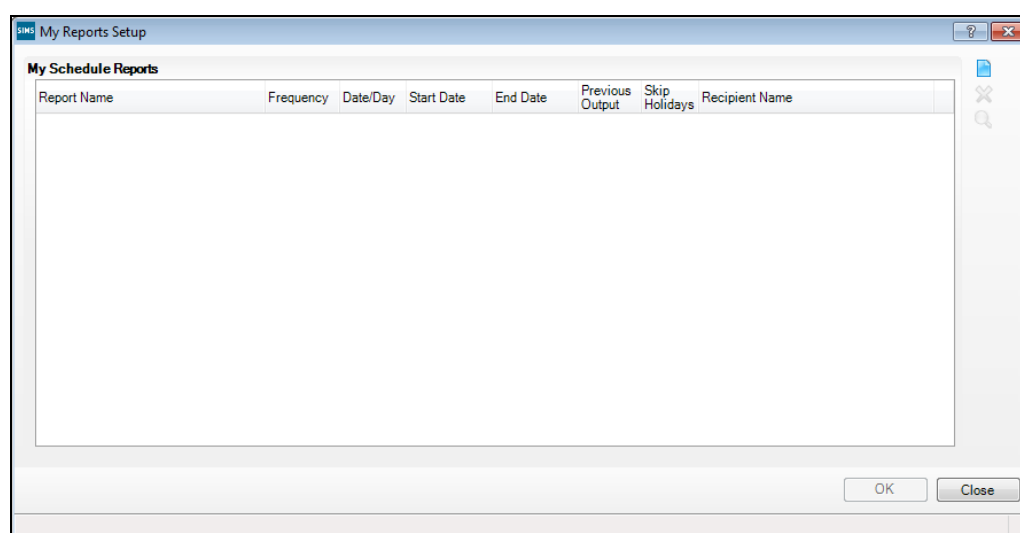
Setting up Scheduled Reports chapter in the *Setting up and Administering SIMS* handbook

Before scheduling any reports to run in SIMS, please consider the following:

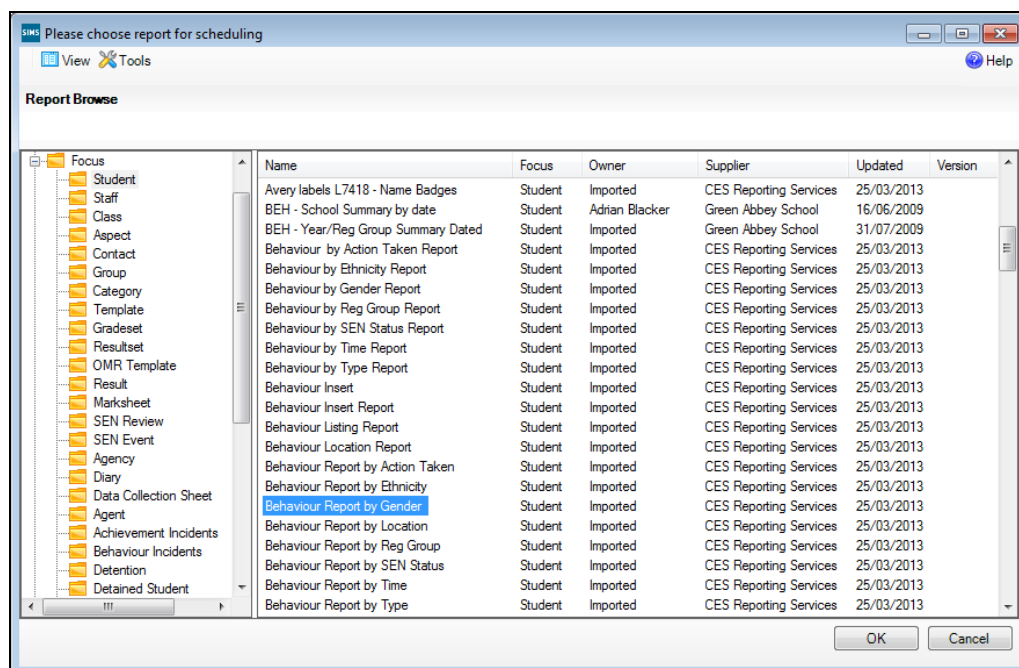
- Ensure that you have applicable permissions to the data contained in the required report. If you do not have sufficient permissions, the scheduled report will be created but you will be unable to open the report.
- Consider the validity of the report. Your System Administrator can advise you of the time of day that scheduled reports will run. This is likely to be out of school hours, although this is not always the case. If you want to schedule a daily report, you need to consider the content of that report. For example, if you are scheduling a report listing pupil/students who were absent at registration, the report will be produced at the time set by the System Administrator. If this is in the early hours of the morning, the report will be produced before today's data is entered and will therefore show yesterday's data (which may be acceptable to you).

1. Select **Focus | Alerts | Schedule Reports** to display the **My Reports Setup** dialog.

Any reports that have already been scheduled are displayed.



- Click the **New** button on the right-hand side of the dialog to display the **Please choose report for scheduling** dialog.



- Navigate to and highlight the required report then click the **OK** button. If any report parameters are required for the report, the **Enter parameter values for report** dialog is displayed.

The screenshot shows the 'Enter parameter values for report' dialog box. It has sections for date filters, year group selection, and reg group selection. The date filter section shows 'Date is between' with 'Value 1' as '06 May 2013' and 'Value 2' as '10 May 2013'. The year group section shows a list with 'Year 8' selected. The reg group section shows a list with '8A' selected.

Date is between

Value 1 06 May 2013

and

Value 2 10 May 2013

☐ Accept All (bypass filter condition)

Year group

Select All

Clear All

Show All

☐ Accept All (bypass filter condition)

Reg group

Select All

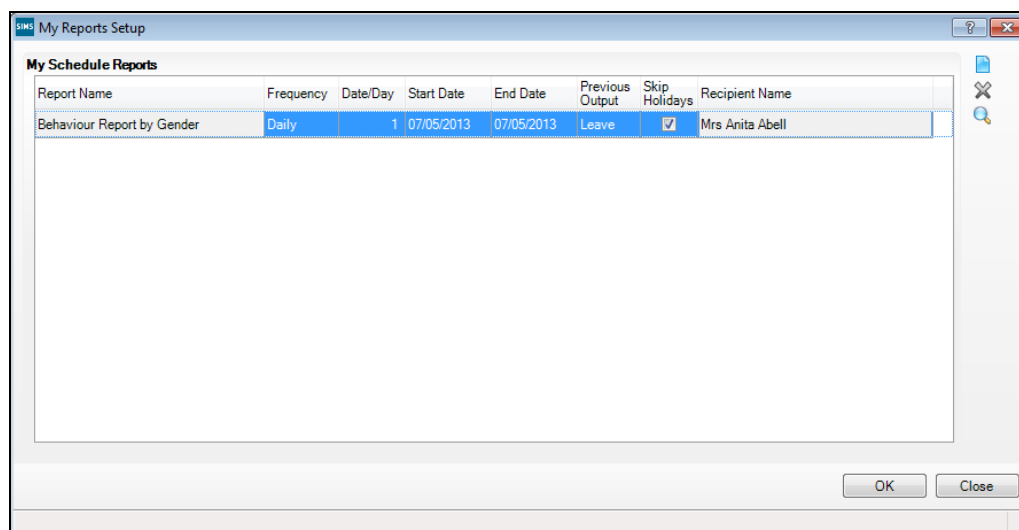
Clear All

Show All

☐ Accept All (bypass filter condition)

OK Cancel

4. Enter or select the required run-time parameters then click the **OK** button to return to the **My Reports Setup** dialog.



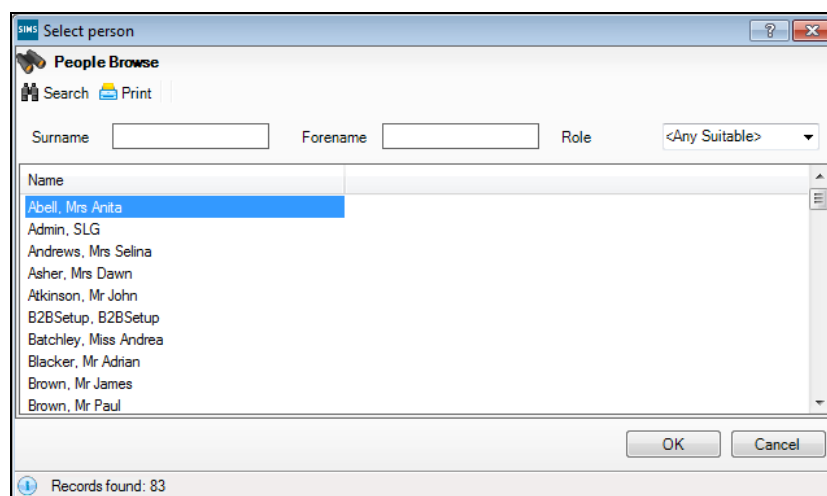
The scheduled report settings can be amended for any report displayed.

- Select the required **Frequency** by clicking in the applicable cell and selecting **Monthly**, **Weekly** or **Daily** from the drop-down list.
- The value in the **Date / Day** field needs to be amended only if **Weekly** or **Monthly** is selected as the **Frequency** because it determines the day of the week or date in the month that the report should be run. Overtyping the value in this field, if required.

NOTE: If your System Administrator has set all SIMS reports to run on a weekly or monthly basis, those settings override any settings applied here. For example, if the administrator has set reports to be run weekly on a Monday and your settings state Wednesday, the reports will be run on a Monday.

- The **Start Date** and **End Date** default to today's dates. Therefore it is essential to amend the **End Date** to a future date (i.e. for as long as you want the scheduled report to run). Either double-click in the fields and overtype the dates or click in the field and select the required dates by clicking the drop-down arrow.
- The **Previous Output** setting determines whether the output from any previously run scheduled report is overwritten or retained. Click in the **Previous Output** field and select **Leave** or **Delete** from the drop-down list.
- The **Skip Holiday** check box identifies whether scheduled reports should be run during school holidays (as defined in the School Diary). This check box is selected by default. Deselect this check box if you want to continue to produce reports during school holidays.

- By default, any scheduled reports are produced for you. However if you have the applicable permissions, you can also select reports to be produce automatically for other users. With the required report highlighted, click the **Choose Recipient** button on the right-hand side of the dialog to display the **Select person** dialog.



Search for, then double-click the required recipient to return to the **My Reports Setup** dialog. The selected **Recipient Name** is displayed.

- Repeat this process for any other reports you wish to schedule.
- Click the **OK** button to complete the process.

Deleting a Scheduled Report

Any scheduled reports that are no longer required can be deleted.

- Select **Focus | Alerts | Schedule Reports** to display the **My Reports Setup** dialog.
- Highlight the required report click the **Delete** button on the right-hand side of the dialog.
- Click the **Yes** button when prompted to confirm the deletion.

03 | Configuring the SIMS Home Page

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Home Page Configuration Overview

The content and layout of the SIMS **Home Page** can be defined on a per-user basis, enabling the display of information that relates specifically to each SIMS user.

The information displayed on the SIMS **Home Page** is displayed in individual panels, which each user can choose to display or hide. When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

The panels that can be displayed on your SIMS **Home Page**, together with their content, are determined by the permissions you have been granted by the System Manager. For example, if you are a class teacher of registration group 8A, the System Administrator may have set up panels on your **Home Page** that display information relating to registration group 8A by default.

The displayed panels can be configured to display data relevant to your role and, for class teachers, the classes that they teach. For example, a Head of Year might want to display behaviour incident information by registration group, whereas a Head Teacher might want to display the same information by year group.

WARNING: Prior to adding panels to the SIMS **Home Page**, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS **Home Page** might be set to refresh regularly. If the SIMS **Home Page** for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.

Configuring the SIMS Home Page

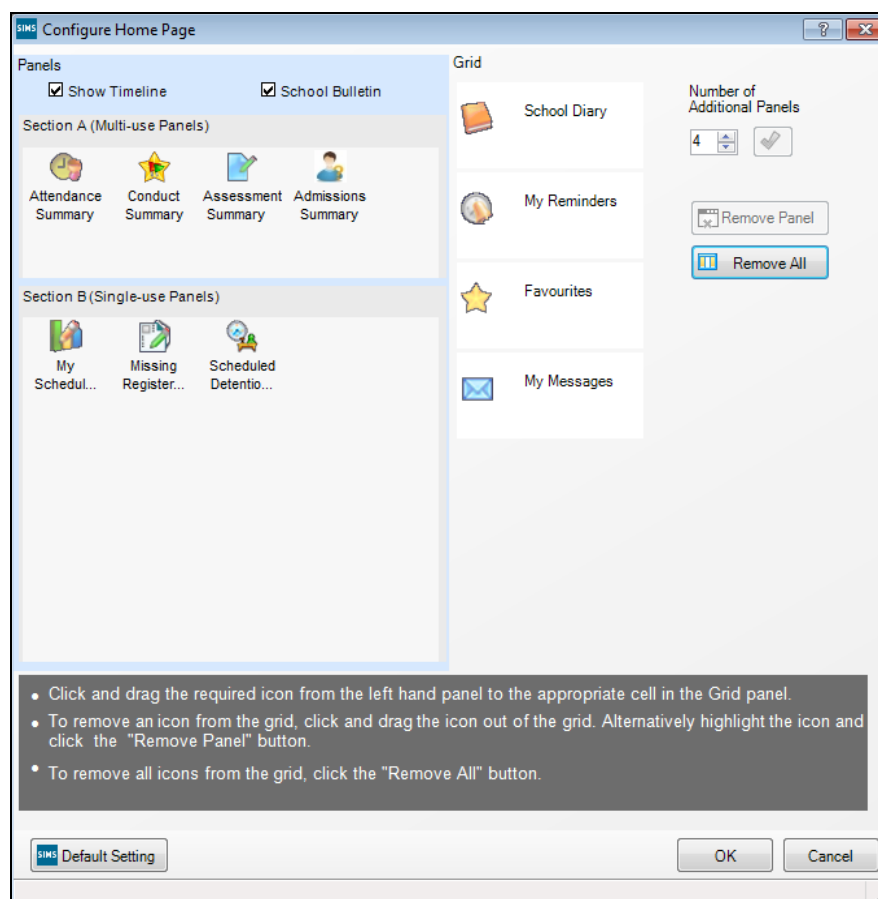
The content and layout of the SIMS **Home Page** can be defined on a per-user basis, enabling the display of information that relates specifically to each SIMS user. Changing the content and layout on your SIMS **Home Page** does not affect the display of the Home Page on any other user's workstation.

The number of panels displayed and their display order can be defined. Once displayed on the SIMS **Home Page**, many of the panels offer additional configuration options.

NOTE: A maximum of 50 panels can be displayed on the SIMS **Home Page**.

The number of panels displayed on the SIMS **Home Page**, together with their content and display order, can be defined.

Click the **Configure** button at the top right-hand side of the SIMS **Home Page** to display the **Configure Home Page** dialog.



The panels currently displayed on your SIMS **Home Page** are shown in the **Grid** on the right-hand side of the dialog. The **Grid** represents the display order of these panels on the SIMS **Home Page**, not the precise layout. When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

For new users of SIMS, the **Grid** contains the panels set up by the System Administrator.

*NOTE: Panels in the **Grid** that display a lock symbol indicate that your System Administrator has dictated the display of this panel. You do not have permissions to remove this panel from your **Home Page**. It may also be possible that you are unable to add panels, and the **Panels** section is greyed out to indicate this.*

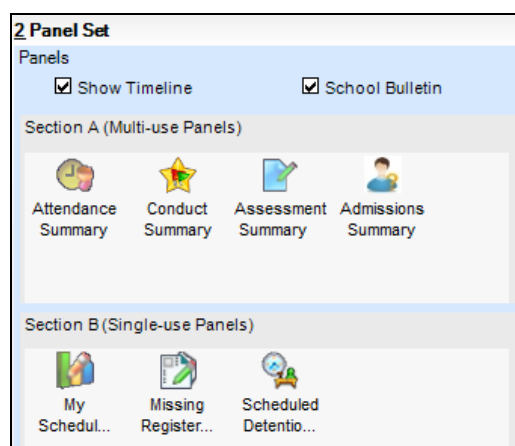


Additional Resources:

General SIMS Setups chapter of the *Setting up and Administering SIMS* handbook

Displaying and Hiding the Default SIMS Home Page Panels

To facilitate the selection of panels you might want to display on your SIMS **Home Page**, the **My Timeline** and **School Bulletins** panels have been identified as two panels that are likely to be beneficial to all SIMS users. Consequently, they have been defined as default panels that you can choose to display prominently on the SIMS **Home Page**.



When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

In the **Panels** section on the left-hand side of the **Configure Home Page** dialog, select or deselect the **Show Timeline** and **School Bulletin** check boxes.

- If selected, the **My Timeline** panel will always be displayed as the first panel, at the top-left hand side of the SIMS **Home Page**.

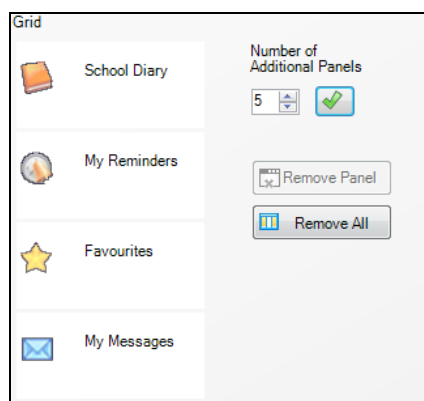
- If only the **School Bulletins** check box is selected, it will be displayed as the first panel on the SIMS **Home Page**.
- If both of these check boxes are selected, the **School Bulletins** panel will be displayed in any empty space to the right-hand side of the **My Timeline** panel. If no space is available to the right, it will be placed in the next available slot on the following line.

Click the **OK** button to return to the SIMS **Home Page**, where the display will be updated.

Selecting the Number of Additional Panels to Display on the SIMS Home Page

The number of panels you wish to display on the SIMS **Home Page** can be defined. This number is in addition to the default panels (the **My Timeline** and **School Bulletin** panels) that you may have selected (please see *Displaying and Hiding the Default SIMS Home Page Panels* on page 79). Therefore if you want to display six panels in total, including the two default panels, enter 4 in the **Number of Additional Panels** field.

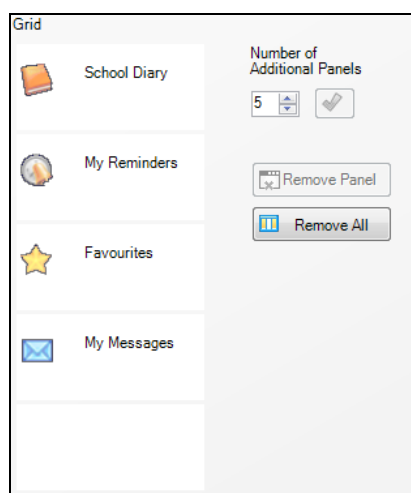
- If the **Number of Additional Panels** is increased, an additional empty panel is displayed beneath the final selected panel.
 - If the **Number of Additional Panels** is decreased, any panels that would cause this value to be exceeded are removed, starting from the bottom of the **Grid** list.
1. Enter the **Number of Additional Panels** you want to display on the SIMS **Home Page**. Alternatively, click in the field then click either the **Up** or **Down** arrow adjacent to the field to change the number.



2. Click the **Configure Layout** button.



Configure Layout button



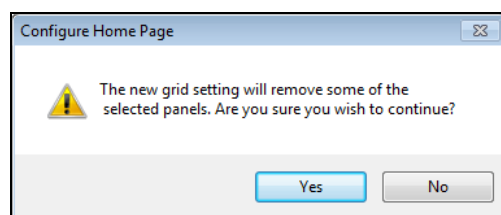
When the configuration is saved, the **Grid** display expands or contracts based on the value entered.

- If the **Number of Additional Panels** was increased, an additional empty panel is displayed beneath the final selected panel.

In the previous graphic, an empty space has been added beneath the **My Messages** panel, enabling another panel to be added to the SIMS **Home Page**.

- If the **Number of Additional Panels** was decreased, any panels that would cause this value to be exceeded are removed, starting from the bottom of the **Grid** list.

In the previous graphic, if the **Number of Additional Panels** was now reduced to four, only the empty space at the bottom of the **Grid** would be removed. However if the **Number of Additional Panels** was reduced to two, the following message will be displayed because you are attempting to remove an occupied space on the SIMS **Home Page**.

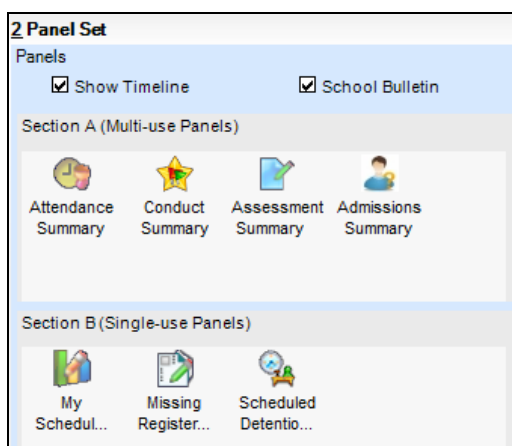


Click the **Yes** button to remove the **Favourites** panel, **My Messages** panel and the empty space at the bottom of the **Grid** and therefore remove them from the SIMS **Home Page**. Alternatively, click the **No** button to cancel the removal of the panel(s).

3. Click the **OK** button to return to the SIMS **Home Page**, where the display will be updated.

Adding Panels to the Home Page

WARNING: Prior to adding panels to the SIMS **Home Page**, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS **Home Page** might be set to refresh regularly. If the SIMS **Home Page** for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.



There are two types of panel that can be added to the SIMS **Home Page**:

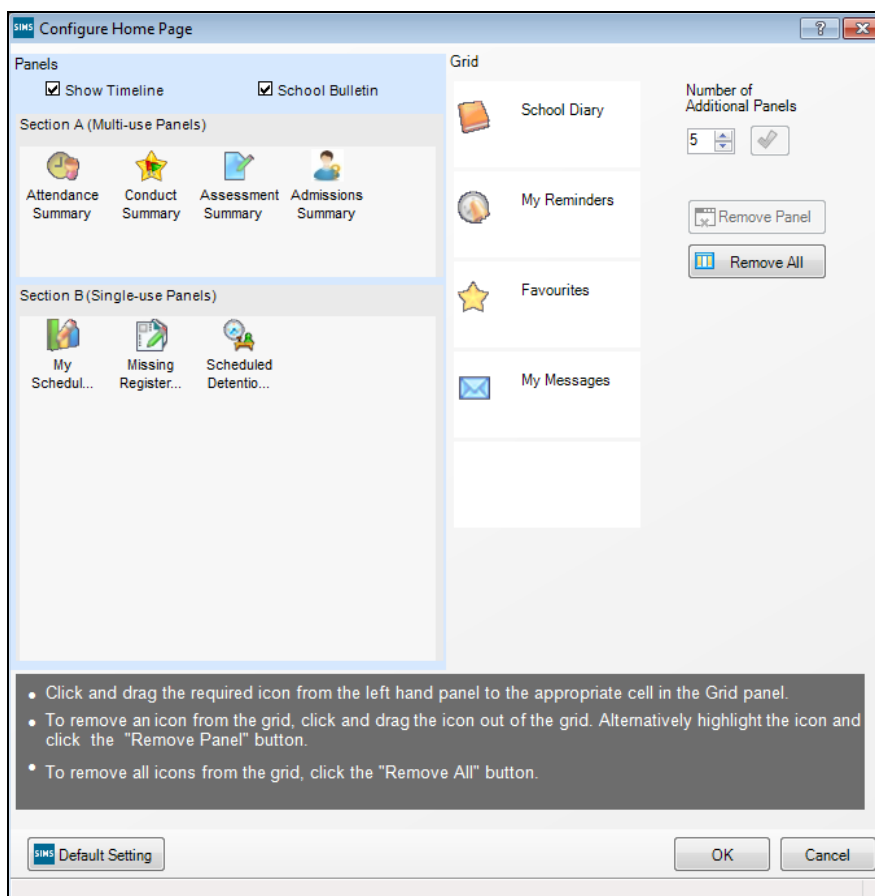
- **Single use panels**
A single use panel serves a single purpose for a SIMS user. This type of panel displays information relevant to the user, e.g. the My Messages panel displays all messages sent to the user and the My Reminders panel displays reminders for events that the user is involved with. One occurrence of these panels can be added to the SIMS **Home Page**.
- **Multi-use panels**
A multi-use panel enables you to view important information relating to a specific subject matter, but for a range of groups. Multiple instances of a multi-use panel can be added to the SIMS **Home Page**. This would be particularly useful for a Head of Year, for example, who may wish to view an attendance summary for each of their registration groups. This can be achieved by adding more than one occurrence of the Attendance Summary panel to their Home Page and configuring each panel separately to display attendance information for each of the registration groups.

The method of adding a single use panel and a multi-use panel is identical. The configuration options available for each individual panel varies depending on the panel you have added.

NOTE: The ability to add panels to the SIMS **Home Page** is determined by the lock settings provided by the System Manager/Administrator. The following processes assume that the lock settings have been disabled, enabling you to add panels to the SIMS **Home Page**. For more information, please refer to the General SIMS Setups chapter of the Setting up and Administering SIMS handbook.

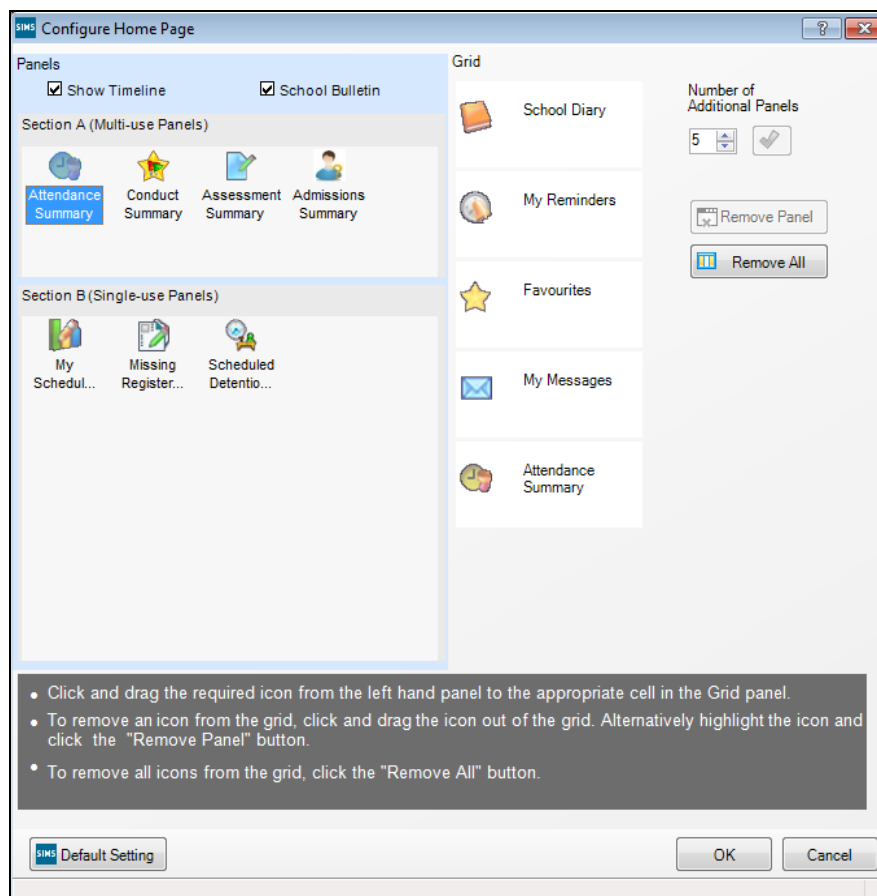
The graphics in this section demonstrate how the **Attendance Summary** multi-use panel can be added to the **Grid**.

1. Ensure that a sufficient number of spaces on the SIMS **Home Page** have been provided for the number of panels you wish to add (please see *Selecting the Number of Additional Panels to Display on the SIMS Home Page* on page 80).



03 | Configuring the SIMS Home Page

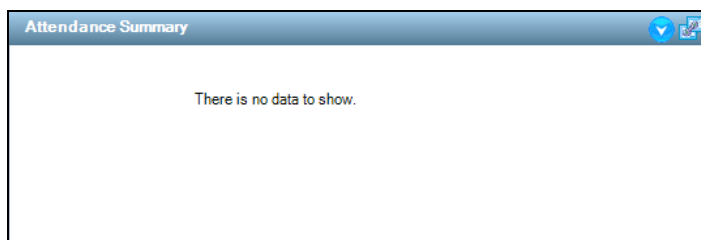
2. Click and drag a panel from either **Section A (Multi-use Panels)** or **Section B (Single-use Panels)** into the required empty position on the **Grid** on the right-hand side of the page. The name of the selected panel is displayed.



NOTE: If you attempt to drag a panel into an occupied space in the Grid, a message is displayed in the Status Bar of the dialog, informing you that the panel cannot be placed in this location. If you want to place a panel into a position that is currently occupied, you must first place the panel into an empty space and then move it to the required location (please see Changing the Panel Order on page 88).

3. Repeat Step 2 until all of the required panels have been selected. If you are selecting to display a multi-use panel, ensure that one instance of the panel is added for each of the groups you wish to monitor.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the new panels are displayed.

If you have added a multi-use panel to the SIMS **Home Page** and a message is displayed in the panel rather than any data, you must configure this panel separately to indicate your preferences.



More Information:

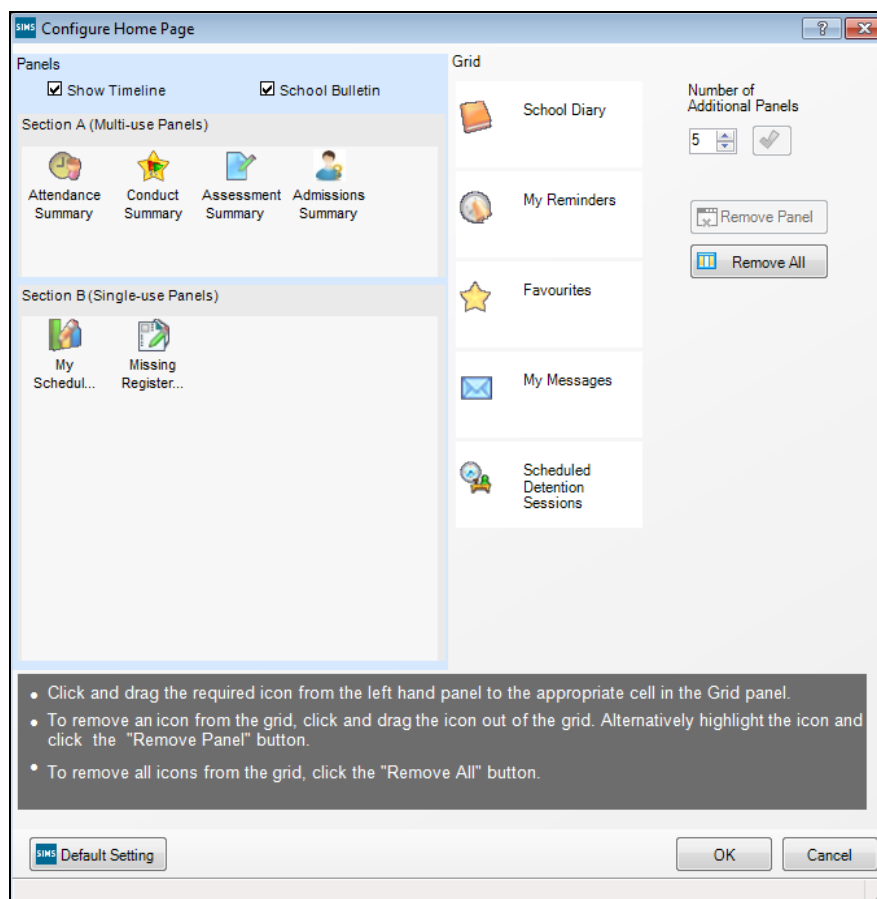
Locking Home Page Groups on page 100

Removing Panels from the Home Page

Panels that are no longer required or have been added to the SIMS **Home Page** in error can be removed.

*NOTE: The ability to add panels to the SIMS **Home Page** is determined by the lock settings provided by the System Manager/Administrator. The following processes assume that the lock settings have been disabled, enabling you to add panels to the SIMS **Home Page**. For more information, please refer to the General SIMS Setups chapter of the Setting up and Administering SIMS handbook.*

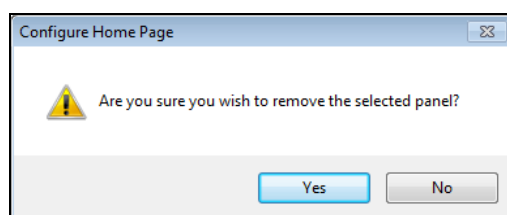
The graphics in this section demonstrate how the **Scheduled Detention Sessions** single use panel can be removed from the **Grid**.



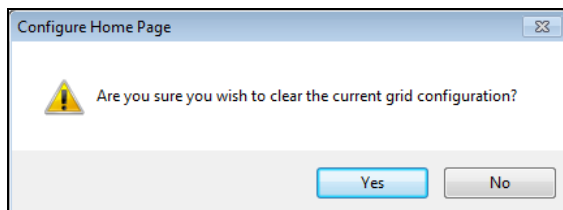
1. In the **Grid** display, click the panel you wish to remove then click the **Remove Panel** button. Alternatively, click and drag the required panel from the **Grid** display to anywhere outside of the **Grid** display. All panels can be removed from the Home Page by clicking the **Remove All** button.

*NOTE: Removing panels by clicking the **Remove All** does not affect the display of the default panels (**My Timeline** and **School Bulletins**). These are treated separately and their display is controlled by the status of their check boxes in the **Panels** section at the top of the **Configure Home Page** dialog.*

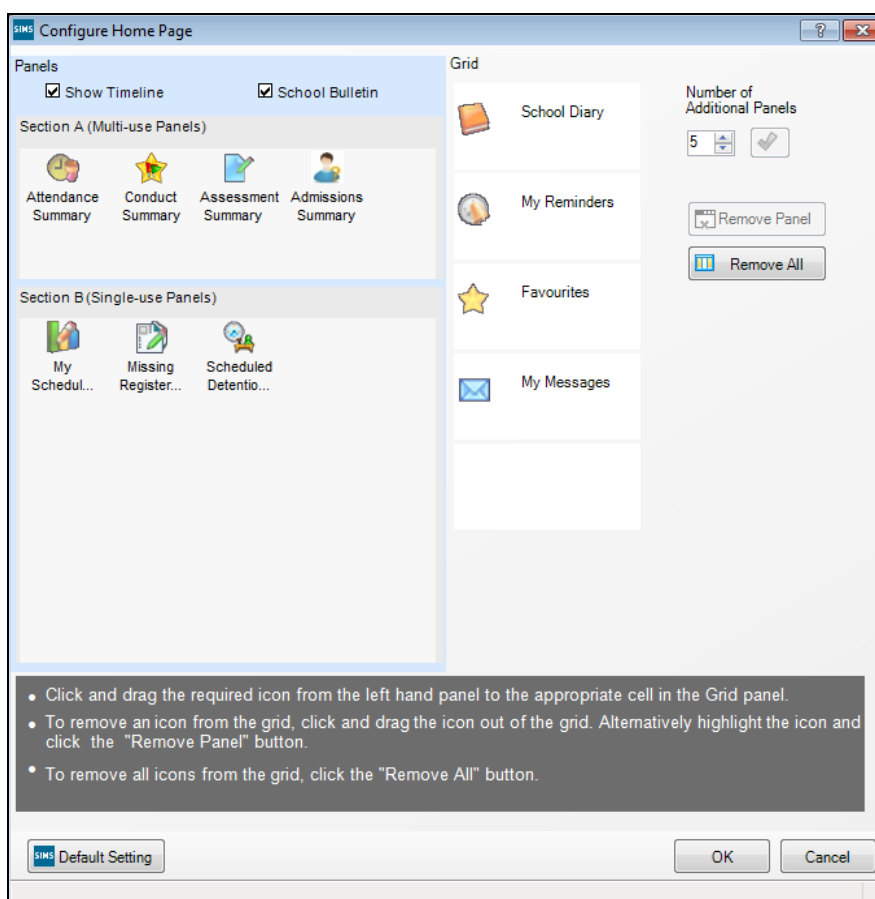
The following message is displayed if you remove a single panel.



The following message is displayed if you remove all panels.



- Click the **Yes** button to remove the panel(s) or the **No** button to cancel the removal.



The selected panel(s) are removed from the **Grid** display.

If you remove a single use panel, the removed panel will be placed back in the **Section B (Single-use Panels)** section.

- Repeat Steps 1 and 2 until all of the required panels have been removed. If you are removing multi-use panels, ensure that each unwanted instance of the panel is removed.
- Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the removed panels are no longer displayed.



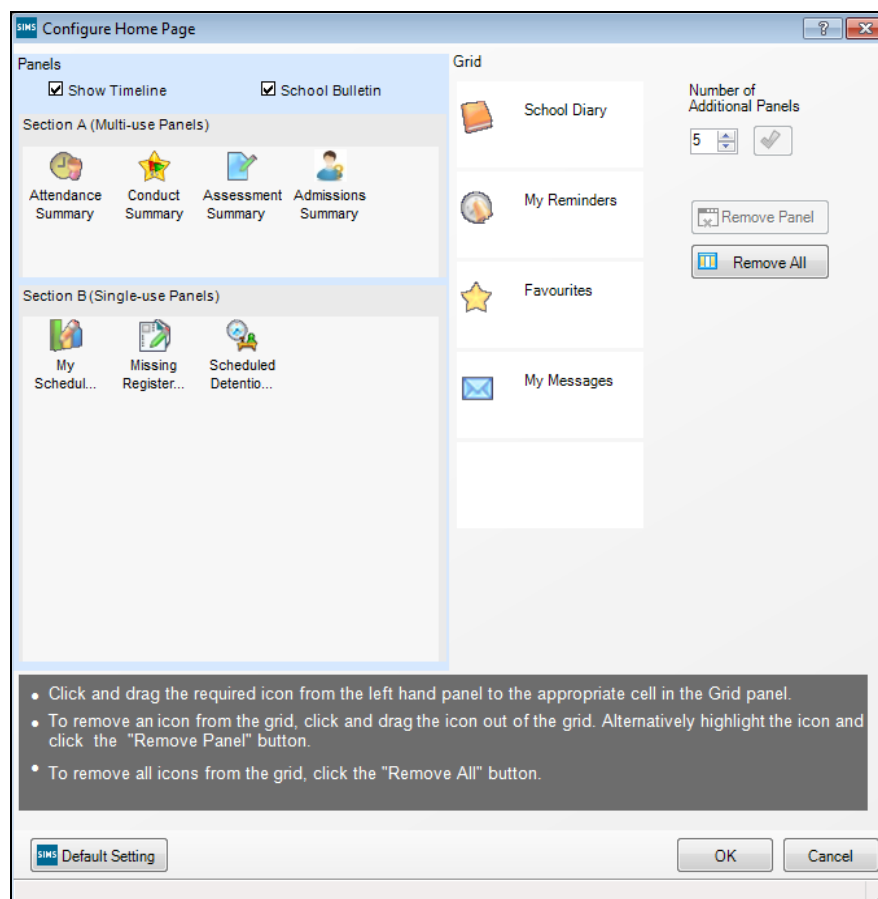
More Information:

Locking Home Page Groups on page 100

Changing the Panel Order

With the exception of the **My Timeline** and **School Bulletins** panels, the display order of all Home Page panels can be changed. This is particularly useful if you want to display a specific panel towards the top of the page, perhaps because you want this information to be instantly visible when the Home Page is displayed.

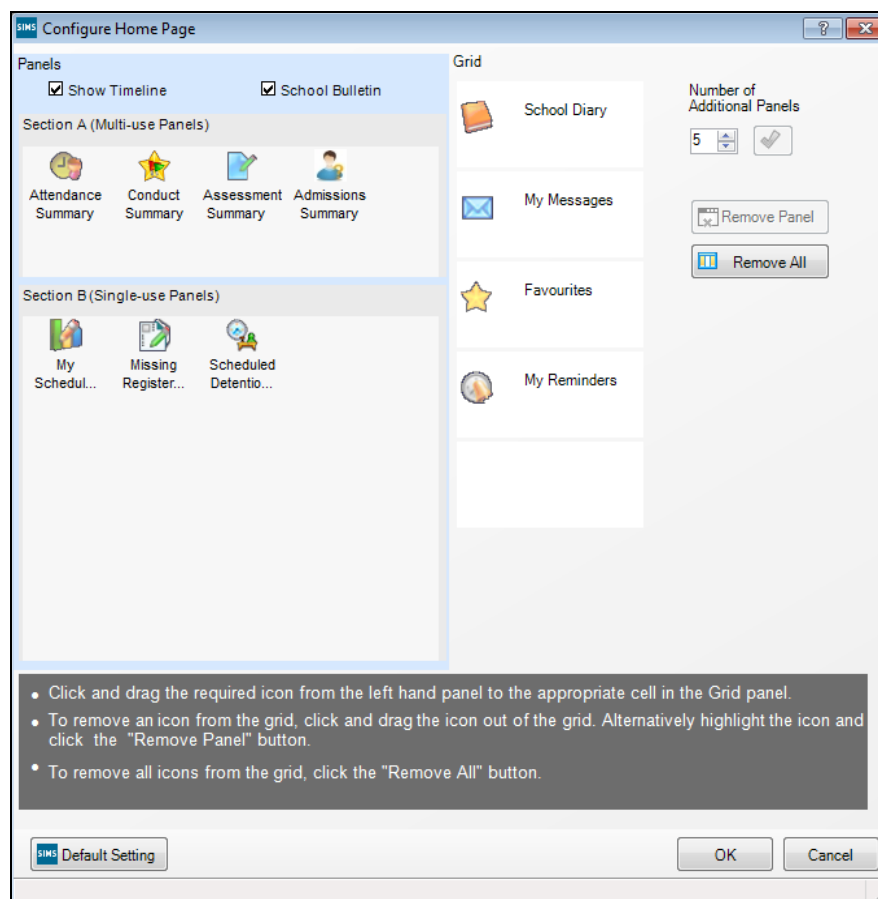
The graphics in this section demonstrate how the panel display order is changed by swapping the location of the **My Messages** and **My Reminders** panels.



1. Ensure that all the panels you wish to display on the SIMS **Home Page** have been added to the **Grid** display (please see *Adding Panels to the Home Page* on page 82).
2. Click and drag a panel from its current location in the **Grid** display to the required location.

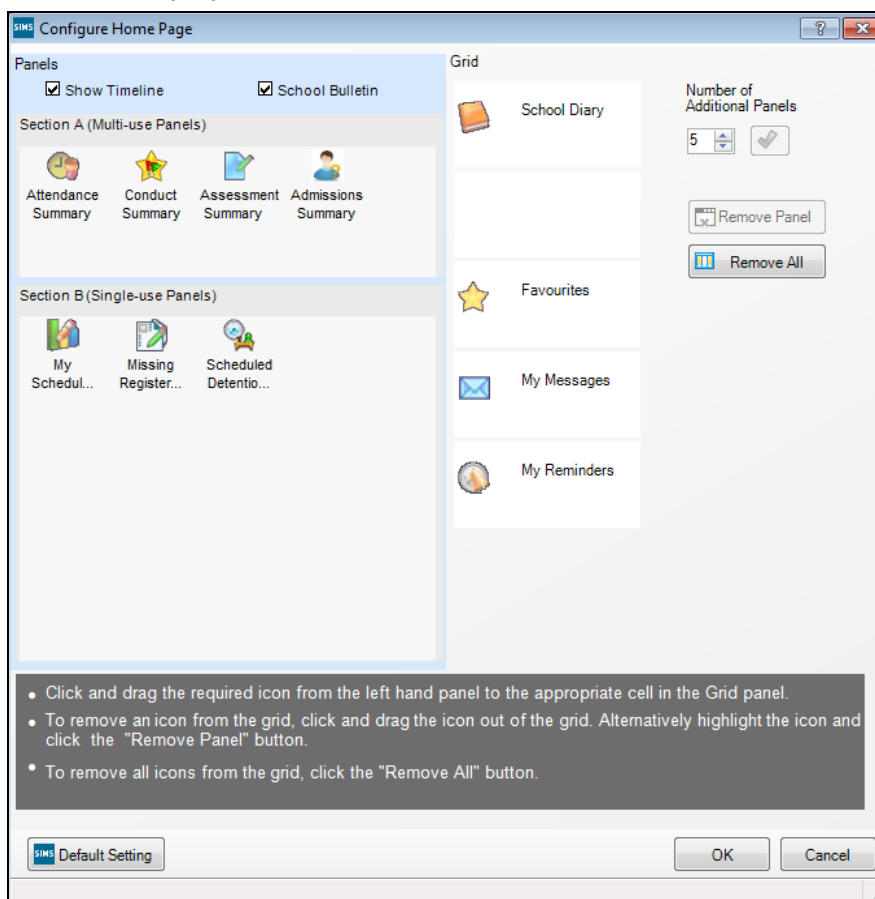
If you move a panel from its current location to an empty space in the Grid display, the panel is removed from its current location and placed into the empty slot.

If you move a panel from its current location to an occupied space in the Grid display, the two panels change places.



3. Repeat Step 2 until the panels are in the required display order.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the panels are displayed in the new order.

The following graphic demonstrates the situation where, having re-arranged the display order of panels on the Home Page, there is an empty space in the **Grid** display.



If you save this configuration by clicking the **OK** button, no empty spaces are displayed on the SIMS **Home Page**. Instead, if an empty space is present on the **Grid** display, this space is truncated on the Home Page and makes best use of the space available.

Reverting to the Default Home Page View

If you have configured the SIMS **Home Page** to display a set of widgets, and these widgets have been configured individually, it is possible to return to the default Home Page configuration, if required.

WARNING: Before continuing, please ensure that you have read the introductory section on Home Page groups (please see Understanding Home Page Groups on page 91).

Restoring the default settings of your Home Page has two effects:

- It restores the layout and configuration of your Home Page widgets to those specified by your Home Page group(s), removing any widgets that are not defined in the Home Page groups.

NOTE: If you are not assigned to a Home Page group, your Home Page reverts to the default layout (please see Default Home Page Panels for Users Not Assigned to a Home Page Group on page 93).

- It merges any summary panels that are configured to view similar information. For example, if you are the Registration Tutor of registration group 7A and 7B, then you may have two **Attendance Summary** panels on your **Home Page**. Restoring the defaults merges these into a single **Attendance Summary** panel, which displays data for both 7A and 7B. This is applicable only if you are recorded as the registration tutor for both of these classes in the pastoral structure (if you tutor only group 7A, the summary panel for 7B is removed when you restore the default settings).
1. Click the **Configure** button at the top of the SIMS **Home Page** to display the **Configure Home Page** dialog.
 2. Click the **Default Setting** button to restore to the default settings then click the **Yes** button to confirm.

*NOTE: If the **Default Setting** button is disabled, it is not possible to restore the default settings because the Home Page group setting is locked.*

3. Click the **OK** button to save the changes and return to the SIMS **Home Page**.



More Information:

Understanding Home Page Groups on page 91

Default Home Page Panels for Users Not Assigned to a Home Page Group on page 93

Understanding Home Page Groups

The information that can be displayed on the SIMS **Home Page** may not be applicable to all members of staff. For example, a Head of Year may want to view only summaries of all pupil/student activity in their year, whereas a class teacher may want to view only the summaries for their class(es).

Home Page groups can be used to ensure that only information relevant to a type of user is displayed on their Home Page. These can be used to display a default set of panels on the **Home Page** for each member of staff who is assigned to a particular group. For example, a class teacher of registration group 7A is assigned to the Registration Tutor Home Page group and therefore, panels that display information on registration group 7A are displayed automatically on their Home Page.

SIMS provides four pre-defined Home Page groups, described in the following table. Please note that all of the pre-defined Home Page groups will include as part of their configuration the automatic display of the **My Timeline** and **School Bulletin** widgets.

Home Page Group	Roles Assigned	Panels Assigned
Head of House	Head of House	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x 2) Scheduled Detention Sessions.
Head of Year	Head of Year	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x2) Scheduled Detention Sessions.
Registration Tutor	Class Teacher	School Diary My Messages My Reminders Favourites My Lesson Plans Attendance Summary Conduct Summary (x2).
Senior Leadership Team	Must be added manually by the System Administrator	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x2) Scheduled Detention Sessions.

NOTES: The preceding table describes only the default assignment of panels to each group in SIMS. Your System Administrator can make changes to these assignments and therefore the panels assigned to you may differ from those specified.

SIMS uses your assignment in the pastoral structure to determine the information displayed on your Home Page. For example, if you are a class teacher recorded as registration tutor for 7A in the pastoral structure, you are assigned summary panels for registration group 7A automatically on your Home Page.

*It is possible to be a member of more than one Home Page group. For example, a Head of Year 7 who is also the registration tutor of registration group 7A would be a member of both the **Registration Tutor** group and the **Head of Year** group. In this case, the member of staff can view the panels assigned to both groups on their Home Page.*

Some members of staff might not be assigned to a Home Page group, in which case they are assigned a default set of Home Page panels (please see Default Home Page Panels for Users Not Assigned to a Home Page Group on page 93).

Default Home Page Panels for Users Not Assigned to a Home Page Group

Some members of staff might not be assigned to a Home Page group. If this is the case, the following panels are displayed on their **Home Page** by default:

- My Timeline
- School Bulletins
- School Diary
- My Messages
- My Reminders
- Favourites

Managing Home Page Groups

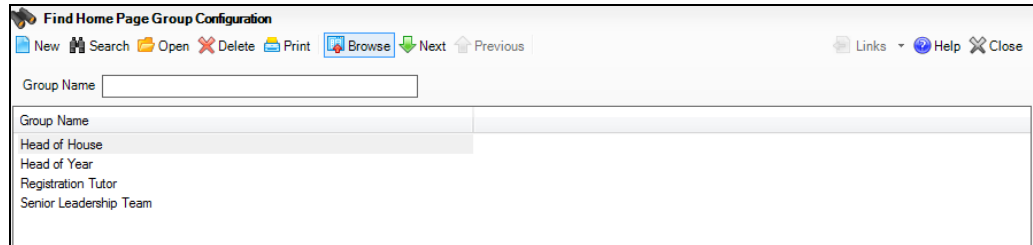
SIMS provides four pre-defined Home Page groups by default. Three of the pre-defined groups are populated automatically with SIMS users, based on their role in the pastoral structure; the Senior Leadership Team is the exception because it requires users to be assigned manually. If the pre-defined Home Page groups do not provide sufficient groupings of SIMS users, you can create your own ones then assign users and Home Page panels to these groups.

A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group. If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page (please see *Default Home Page Panels for Users Not Assigned to a Home Page Group* on page 93).

Searching for a Home Page Group

Before adding a Home Page Group, you are advised to search for existing groups to ensure that a group with a similar or identical purpose does not already exist.

1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.



The screenshot shows a web browser window titled "Find Home Page Group Configuration". The window has a menu bar with "New", "Search", "Open", "Delete", "Print", "Browse", "Next", and "Previous". There are also "Links", "Help", and "Close" buttons. Below the menu bar is a "Group Name" search field. Below the search field is a list of group names: "Group Name", "Head of House", "Head of Year", "Registration Tutor", and "Senior Leadership Team".

2. Enter all or part of the **Group Name** then click the **Search** button to display all Home Page groups that match the search criteria entered. Alternatively, leave the search criteria blank then click the **Search** button to display all recorded Home Page groups.

Adding /Editing Home Page Groups

1. Search for the Home Page group you wish to edit. If you intend to add a Home Page group, search to ensure that an identical one does not already exist.
2. Highlight the Home Page group you wish to edit then click the **Open** button or add a Home Page group by clicking the **New** button to display the **Home Page Group Configuration Details** page.

1 Group Details

Group Name

Staff

2 Panel Set

Panes

☒ Show Timeline ☒ School Bulletin

Section A (Multi-use Panels)

Attendance Summary Conduct Summary Assessment Summary Admissions Summary

Section B (Single-use Panels)

My Schedul... Missing Register... Scheduled Detentio...

Grid

School Diary

My Messages

My Reminders

Favourites

Refresh Rates

Timeline Widget: 00:15

Permissions

Modify Timeline Options ☐

Modify Refresh Rates ☐

- Click and drag the required icon from the left hand panel to the appropriate cell in the Grid panel.
- To remove an icon from the grid, click and drag the icon out of the grid. Alternatively highlight the icon and click the "Remove Panel" button.
- To remove all icons from the grid, click the "Remove All" button.

3. Enter a unique **Group Name**.

Assigning Users to a Home Page Group

1. Click the **Search Staff** button to display the **Search Staff** dialog.



Search Staff button

☐	Title	Surname	Forename	Gender

2. Search for the required member(s) of staff by selecting their **Role Type** from the drop-down list (e.g. **Current Teaching Staff**) then clicking the **Search** button to display all members of staff with that role. Searching by **Role Type** is a convenient method of assigning all current teaching staff to a single Home Page group.



Search button

☐	Title	Surname	Forename	Gender
☐	Mrs	Abell	Anita	Female
☐	Mrs	Andrews	Selina	Female
☐	Mr	Atkinson	John	Male
☐	Mr	Blacker	Adrian	Male
☐	Mr	Brown	James	Male
☐	Mr	Brown	Paul	Male
☐	Miss	Burrows	Katie	Female
☐	Miss	Burton	Fiona	Female
☐	Mrs	Chase	Lynn	Female

Records found: 57

3. Select the check box of the member(s) of staff you wish to add to the Home Page group. Alternatively, select the check box in the header row to select all members of staff currently displayed in the **Search Staff** dialog.
4. Click the **Select** button to assign the member(s) of staff to the Home Page group.
5. Click the **Close** button to return to the **Home Page Group Configuration Details** page, where the **Staff** list is populated with the selected member(s) of staff.

- Any members of staff who have been added in error can be removed from the group by highlighting their name then clicking the **Remove Staff** button.



Remove Staff button

NOTES: A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group.

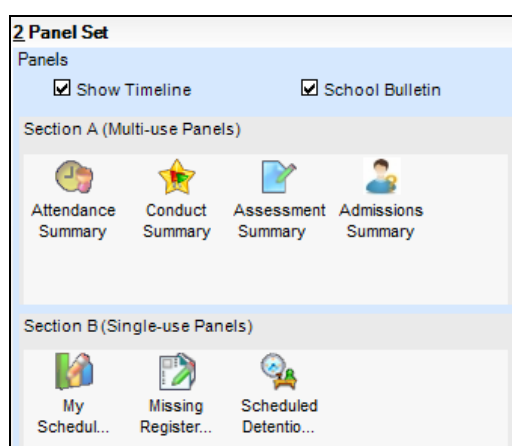
If a staff member is assigned to more than one Home Page group, and you subsequently remove them from one of these groups, the panels assigned to the group from which they have been removed will still be displayed on their Home Page until they have been removed manually by the user. To remove all group panels from a user's Home Page, the user must be removed from all Home Page groups.

If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page (please see Default Home Page Panels for Users Not Assigned to a Home Page Group on page 93).

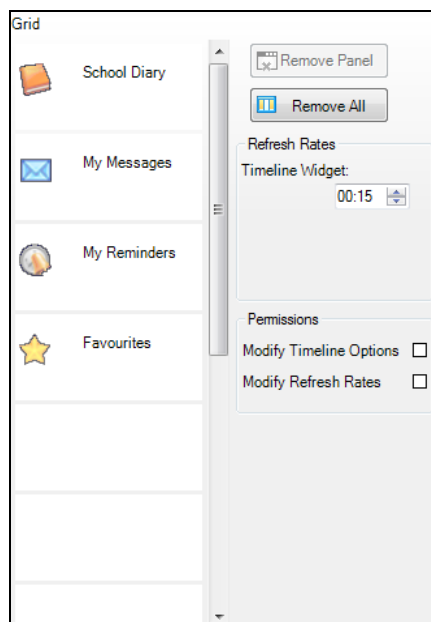
Allocating Panels to a Home Page Group

- In the **Panel Set** panel, select the **Show Timeline** and **School Bulletin** check boxes to display these panels on the Home Page of users assigned to the selected Home Page group.

The icons in **Section A** and **Section B** represent the panels that can be added to the Home Page group.



The **Grid** section on the right-hand side of the **Panel Set** panel consists of any panels already assigned to the Home Page group, together with a number of available spaces into which additional panels can be placed.



2. To add a panel to the selected Home Page group, click and drag it from the **Section A** or **Section B** on the left-hand side of the **Panel Set** panel into the required position in the **Grid** on the right-hand side of the **Panel Set** panel.
3. To switch the position of panels in the grid, click and drag the panel you wish to move to the required location.
4. To remove a panel, click and drag the panel out of the grid. Alternatively, click the panel you wish to remove then click the **Remove Panel** button. To remove all panels from the **Grid**, click the **Remove All** button.

WARNING: Careful consideration should be given when adding panels to a Home Page group, particularly when the group consists of a large number of users. Some of the panels have frequent refresh intervals, so a large number of panels displaying on several workstations could lead to a reduction in the performance of the SIMS system.

5. Click the **Save** button to save the changes. The changes to a Home Page group come into effect once SIMS is restarted on a user's workstation.

Preventing Changes to the Home Page Configuration and Resetting Configurations

1. If you want to prevent users who are members of a Home Page group from changing the configuration of the **My Timeline** widget, i.e. prevent users from selecting the events displayed on the widget:
 - a. Deselect the **Modify Timeline Options** check box in the **Permissions** panel.
 - b. Click the **Save** button.
2. If you want to reset the **My Timeline** widget for users who are members of a Home Page group to its original configuration as defined in the **Home Page Timeline Configuration** dialog:
 - a. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
 - b. Click the **Reset Timeline** button, click the **OK** button to confirm the selection of staff then click the **Yes** button.
3. If you want to prevent users from changing the refresh rates for the widgets displayed on their Home Page:
 - a. Deselect the **Modify Refresh Rates** check box in the **Permissions** panel.
 - b. In the **Refresh Rates** panel, enter the refresh rate of the **Timeline Widget** or select the rate by clicking either the **Up** or **Down** button. This is a global value that cannot be changed by a user, if the **Modify Timeline Options** check box is selected.
 - c. Click the **Save** button.
 - d. To set a default refresh rate (which cannot then be changed by a user), click each widget displayed in the **Grid** panel then enter a refresh rate in the widget-named field in the **Refresh Rates** panel or select the rate by clicking either the **Up** or **Down** button. This option is available only for widgets that have a configurable refresh rate.
 - e. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
 - f. Click the **Reset Refresh Rates** button, click the **OK** button to confirm the selection of staff then click the **Yes** button to affect the change.
4. If a user's Home Page configuration has been corrupted, you can reset the configuration of the Home Page for all members of staff associated with the selected Home Page group.
 - a. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
 - b. Click the **Restore Default Configuration** button, click the **OK** button to confirm the selection of staff then click the **Yes** button to affect the change.
5. Click the **Save** button then restart SIMS to update the system configuration.

Locking Home Page Groups

The panels assigned to each Home Page group can be locked to ensure that users cannot remove them from their Home Page. This functionality can also be used to prevent users from displaying additional panels on their Home Page.

NOTES: Setting a lock on Home Page groups does not prevent users from configuring panels that are already displayed on their Home Page.

Careful consideration should be given to the locking options selected because any setting applied affects all Home Page groups. It is not possible to select the Home Page groups to which you wish to apply a lock.

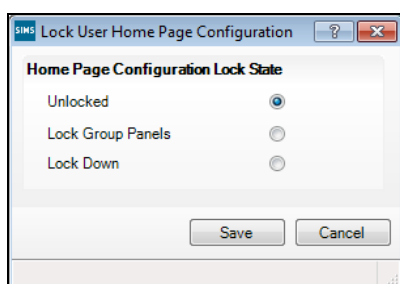
Three levels of locking are available:

- **Unlocked** - this is the default option. The panels assigned to all Home Page groups are initially displayed on each member's Home Page. However, each group member can add or remove panels as required. The additional panels selected by each user do not affect the panel configuration of the remaining members of the Home Page group.
- **Lock Group Panels** - selecting this option prevents the removal of panels assigned to each group member. Each group member can display additional panels on their Home Page. However, none of the default panels assigned to the Home Page group can be removed. Any additional panels that a member chooses to display do not affect the panel configuration of the remaining members of the Home Page. Any additional panels that a member chooses to display can be removed, if required.

*NOTE: The **Lock Group Panels** option does not lock the **Show Timeline** or **School Bulletin** check boxes, or the **School Diary**, **My Messages**, **My Reminders** or **Favourites** panels in the **Configure Home Page** dialog (accessed by clicking the **Configure** button at the top of the SIMS **Home Page**). All of these panels are user-defined and therefore can be removed by each user.*

- **Lock down** - selecting this option locks all panels on the Home Page for all users. This rule applies to panels that are assigned to a Home Page group, to panels that have been added by each user and to panels of any user who is not a member of a Home Page group. Selecting this option prevents a user from displaying additional panels and from removing existing panels.

1. Select **Routines | Home Page | Lock Home Page Configuration** to display the **Home Page Configuration Lock State** dialog.



2. Select the required radio button then click the **Save** button to save the lock configuration.

The lock setting comes into effect when SIMS is restarted on a user's workstation.

Deleting Home Page Groups

Home Page groups that have been added in error or are no longer required can be deleted.

1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.
2. Click the **Search** button to display all Home Page groups.
3. Highlight the group you wish to delete then click the **Delete** button.

Producing the Home Page Configuration Settings Report

The Home Page Configuration Settings report provides a summary of the widgets specified for each Home Page configuration group. If the performance of the SIMS Home Page is reduced, this report assists the System Manager in detecting what might be slowing system performance and what changes could be made to improve it.

The default refresh rate (for each widget that has a configurable refresh rate) is displayed, as is the range of other widgets associated with the group and the number of group members. Additionally, an indication is provided of whether group members can change refresh rates for the widgets and whether they can change the timeline options.

1. Select **Routines | Home Page | Home Page Configuration Settings Report** to display the **Home Page Configuration Settings Report** dialog.

Group	Members	Refresh Rates	Timeline Options	Timeline	Attendance Summary	Conduct Summary	My Messages	Missing Registers	School Diary	S
Registration Tutor	30	-	✓	0:22	0:05	0:12	0:09	--	0:45	--
Head of Year	0	-	-	0:15	0:05	0:12	0:05	--	0:08	--
Head of House	4	-	-	0:15	0:05	0:12	0:05	--	0:08	--
Senior Leadership Team	0	-	-	0:15	0:05	0:12	0:05	--	0:08	--
InTouch Administrator	14	-	-	0:11	--	--	--	--	--	0

2. Hover over a cell of the report to display more information at the bottom of the dialog.
3. To copy the content of the report to the clipboard so that it can be pasted into another application, e.g. Microsoft® Excel, click the **Export** button.
4. Click the **Close** button.

Configuring the Home Page Timeline

The default configuration of the **My Timeline** widget on the SIMS **Home Page** can be defined. SIMS users can define their specific requirements using the configure option in the **My Timeline** widget.

1. Select **Routines | Home Page | Home Page Timeline Configuration** to display the **Home Page Timeline Configuration** dialog.

2. In the **Timeline Options** panel, enter the default **Start time** and **End time** for the **My Timeline** panel. Alternatively, select the times from the respective drop-down lists.

The dates entered or selected determine the visible timescale on the **My Timeline** panel when the Home Page is opened. Having entered 08:30 as the **Start time** and 16:00 as the **End time** means that, when the Home Page is opened, the period between 08:30 and 16:00 are displayed on-screen, with a white background (indicating 'active' hours). Any times before and after this period are displayed with a darker background, indicating that this is outside of normal working hours.

*NOTE: A period of 11 hours and 30 minutes can be displayed on the default **My Timeline** view. Use the adjacent scroll bar to view earlier or later events. Alternatively, maximise the display of the **My Timeline** panel to view the panel in full screen mode.*

3. Select the days of the week you wish to display on the **My Timeline** panel by defining the **Work week**. Select the check box adjacent to the day(s) of the week you want to display.
4. Select the first day of the working week from the **Start day** drop-down list. This indicates day of the week that is displayed in the left-hand column and, based on the settings in the **Work week** section, the subsequent columns.
5. If you want to display the timeline for the entire week when the **My Timeline** widget is expanded to full-screen mode, select the **Auto-format Layout on Resize** check box. Deselecting this check box displays the timeline for today only when the widget is expanded.

6. In the **Event Selection** panel, select the check box of the type(s) of event you wish to display in the **My Timeline** panel.



7. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.



More Information:

Increasing the Size of Panels on the Home Page on page 71

Configuring the Individual Panels on the SIMS Home Page

Configuring the My Timeline Panel

Your timetable is displayed in the **My Timeline** widget on the SIMS **Home Page**.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Timeline** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page 82).

The content of the **My Timeline** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **My Timeline** panel with any new events, etc. at regular intervals.

WARNING: Prior to setting a default refresh rate for a panel on the SIMS Home Page, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.



Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Timeline Configuration** dialog.



Options button

2. Enter the default **Start time** and **End time** for the **My Timeline** panel. Alternatively, select the times from the respective drop-down lists.

The dates entered or selected determine the visible timescale on the **My Timeline** panel when the Home Page is opened. Having entered 08:30 as the **Start time** and 16:00 as the **End time** means that, when the Home Page is opened, the period between 08:30 and 16:00 are displayed on-screen, with a white background (indicating 'active' hours). Any times before and after this period are displayed with a darker background, indicating that this is outside of normal working hours.

NOTE: A period of 11 hours and 30 minutes can be displayed on the default **My Timeline** view. Use the adjacent scroll bar to view earlier or later events. Alternatively, maximise the display of the **My Timeline** panel to view the panel in full screen mode.

3. Select the days of the week you wish to display on the **My Timeline** panel by defining the **Work week**. Select the check box adjacent to the day(s) of the week you want to display.
4. Select the first day of the working week from the **Start day** drop-down list. This indicates day of the week that is displayed in the left-hand column and, based on the settings in the **Work week** section, the subsequent columns.

5. In the **Event Selection** panel, select the check box of the type(s) of event you wish to display in the **My Timeline** panel. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
6. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 15 minutes. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
7. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.



More Information:

Viewing the My Timeline Panel on page 19

Increasing the Size of Panels on the Home Page on page 71

Configuring the School Diary Panel

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **School Diary** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page 82).

The content of the **School Diary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **School Diary** panel with any new events, etc. at regular intervals.

WARNING: Prior to setting a default refresh rate for a panel on the SIMS **Home Page**, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

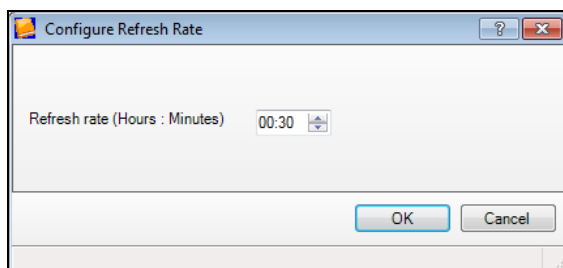


Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Refresh Rate** dialog.



Options button



2. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 30 minutes.
3. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.



More Information:

Viewing the School Diary on page 40

Configuring the My Messages Panel

All messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**. This includes system messages if a message that you have sent to another SIMS user cannot be delivered.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Messages** panel has been selected to display on the SIMS Home Page (please see *Adding Panels to the Home Page* on page 82).

The content of the **My Messages** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **My Messages** panel with any new messages at regular intervals.

WARNING: Prior to setting a default refresh rate for a panel on the SIMS Home Page, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

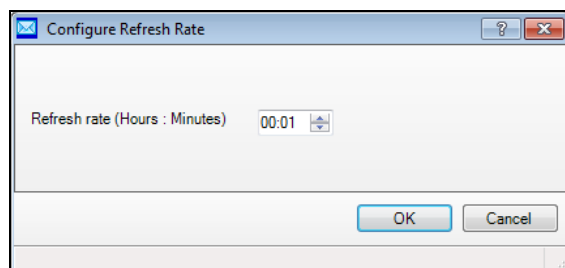


Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Refresh Rate** dialog.



Options button



2. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 1 minute.
3. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

**More Information:**

Viewing My Messages on page 46

Configuring the Missing Register Notification Panel

This section is applicable only to users with Attendance Manager permissions.

It is possible to display a list of registers that have not been completed within a specified number of minutes after a lesson or session starts.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **Missing Register Notification** widget has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page 82).

The content of the **Missing Register Notification** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **Missing Register Notification** panel with any new messages at regular intervals.

WARNING: Prior to setting a default refresh rate for a panel on the SIMS **Home Page**, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.



Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Missing Registers** dialog.



Options button

2. Enter the number of minutes after a lesson/session starts that you wish to check for missing registers in the **Check Missing Registers** field.
3. The **Message Text** you wish to send with the notification can be defined. The default message is:
You have not taken the register for the specified class.
4. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 10 minutes. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.

IMPORTANT NOTE: By default, the content of the **Missing Registers Notification** panel is refreshed every ten minutes. If you elect to check for missing registers 15 minutes after a lesson or session starts, the period of time before the **Missing Registers Notification** panel displays this information may be up to 25 minutes after the lesson or session starts. It is important to bear this in mind when setting the notification delay.

5. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.



More Information:

Viewing Missing Register Notifications on page 56

Configuring the My Detention Sessions Panel

Any detention sessions for which you are the main staff member assigned are displayed in the **My Detention Sessions** widget.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

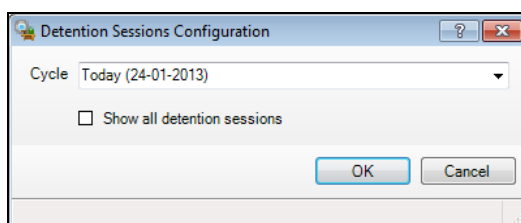
This section assumes that the **My Detention Sessions** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page 82).

The content of the **My Detention Sessions** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the **SIMS Home Page** is not already open).

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Detention Sessions Configuration** dialog.



Options button



2. Select the detentions you wish to display selecting the required **Cycle** from the drop-down list. For example, to display detention sessions for the current week for which you are the main supervisor, select **Current Week (<Start Date of the current week> to <End Date of the current week>)**.
3. To display all detention sessions over the selected **Cycle**, regardless of whether they are the main supervisor, select the **Show all detention sessions** check box.
4. Click the **OK** button to save the panel configuration and return to the **SIMS Home Page**. Any changes to the configuration are implemented immediately.

*NOTE: If you elect to display all detention sessions over the selected **Cycle**, the panel is renamed **All Detention Sessions Scheduled** when you return to the Home Page.*



More Information:

Viewing My Detention Sessions on page 59

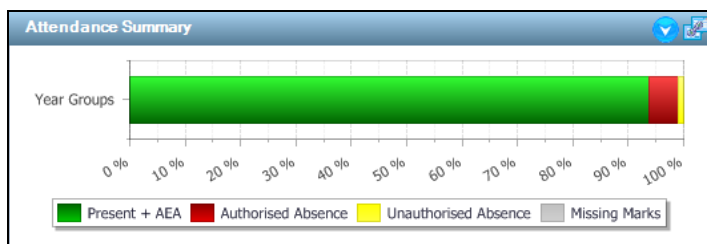
Configuring the Attendance Summary Panel

A summary of pupil/student's attendance can be displayed in the Attendance Summary widget on the **SIMS Home Page**, enabling the monitoring of their progress.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

03 | Configuring the SIMS Home Page

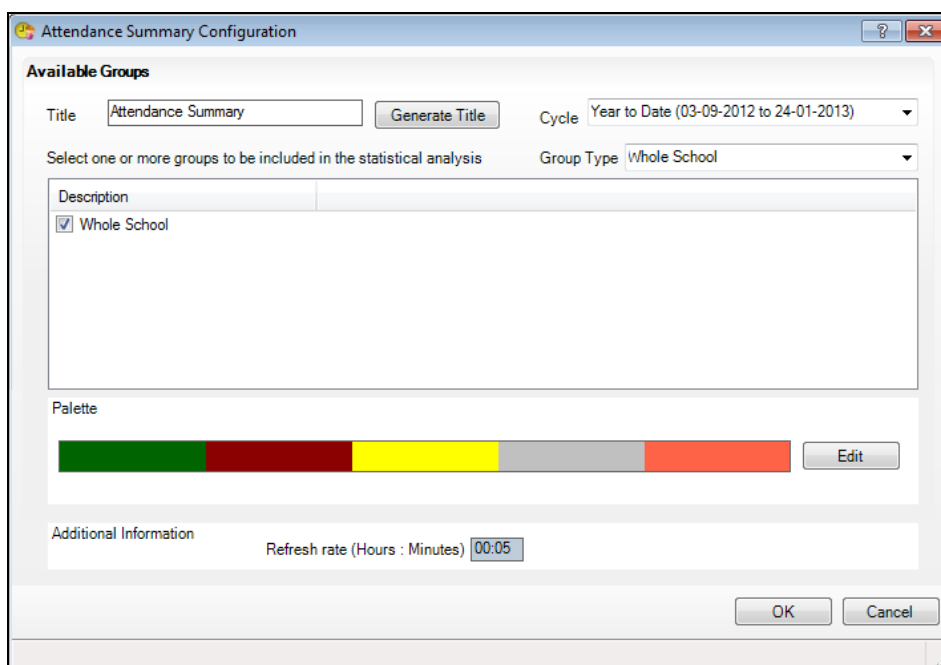
Multiple instances of the **Attendance Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Attendance Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the **SIMS Home Page** is not already open).



1. In the appropriate Attendance Summary panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Attendance Summary Configuration** dialog.



Options button



2. Select the period over which you wish to display attendance information by selecting the required **Cycle** from the drop-down list. For example, to display attendance from the first day of the academic year to today's date, select **Year to Date (<Start Date of the current academic year> to <Today's date>)**.

*NOTE: The **Cycle** drop-down menu enables you to select dates from the current academic year only.*

3. Select the group(s) that you wish to associate with this panel.
 - a. Select the required **Group Type** from the drop-down list (e.g. **Year Groups**, **Reg Groups**, etc.). The content of the table displayed below changes, depending on the option selected.
 - b. Select the check box of the group(s) that you wish to include on the selected panel, e.g. **Year 7**, **11D**, etc.

4. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Attendance Summary**. To match the **Title** with the name of the selected group(s) (e.g. **Attendance Summary for Year 7**, **Attendance Summary for 11D**, etc.), click the **Generate Title** button. Alternatively, delete the text and enter your own title.
5. The colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page 118) by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor**.
6. Enter the **Refresh rate (Hours:Minutes)** or use the **Up** and **Down** arrow buttons to select the required value. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
7. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
8. Repeat this process for any other instances of the **Attendance Summary** panel that you have elected to display on your Home Page.



More Information:

Adding Panels to the Home Page on page 82

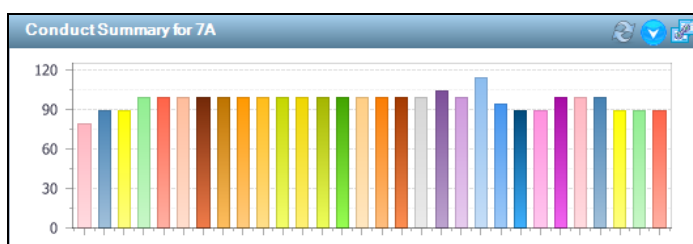
Viewing the Attendance Summary on page 60

Configuring the Conduct Summary Panel

A summary of pupil/student's conduct can be displayed in the **Conduct Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress.

Additional configuration options are available for this widget, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Conduct Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Conduct Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).



1. In the appropriate Conduct Summary panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Conduct Summary Configuration** dialog.



Options button

2. Select the period over which you wish to display conduct information by selecting the required **Cycle** from the drop-down list. For example, to display conduct from the first day of the academic year to today's date, select **Year to Date (<Start Date of the current academic year> to <Today's date>)**.

*NOTE: The **Cycle** drop-down menu enables you to select dates from the current academic year only.*

3. Select the group(s) that you wish to associate with this panel.
 - a. Select the required **Group Type** from the drop-down list (e.g. **Year Groups**, **Reg Groups**, etc.). The content of the table displayed below changes, depending on the option selected.
 - b. Select the check box of the group(s) that you wish to include on the selected panel, e.g. **Year 7**, **7A**, etc. If **Classes** is selected from the **Group Type** drop-down list, select the required check box(es) from the **Course** table to populate the **Class** table. Select the required check box(es) of the classes you wish to include on the selected panel.

4. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Conduct Summary**. To append the **Title** with the name of the selected group(s) (e.g. **Conduct Summary for Year 7, Attendance Summary for 7A**, etc.), click the **Generate Title** button. Alternatively, enter a title of your choosing.
5. Select the achievement types and behaviour types you wish to display on the **Conduct Summary** panel.
 - a. In the **Select one or more Achievement types** chooser, highlight the required achievement type then click the **Select** button. Multiple achievement types can be selected using **Ctrl + click** and **Shift + click** functionality then clicking the **Select** button. To select all achievement types in the list, click the **Select all** button. Achievement types added in error can be removed using the same highlighting method then clicking the **Remove** or **Remove all** button.



Select all button



Select button



Remove button



Remove all button

- b. Repeat Step 5a to select the required behaviour types in the **Select one or more Behaviour types** chooser.

NOTE: To enable the effective display of conduct information, you are strongly advised to add no more than 30 achievement and behaviour types to the Conduct Summary panel. Printed output of the panel will also be more difficult to view if a larger number of types are displayed and some types may not fit onto the printed output.

6. The colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page 118) by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor**.
7. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 12 minutes. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
8. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Conduct Summary** panel that you have elected to display on your Home Page.



More Information:

Adding Panels to the Home Page on page 82

Viewing the Conduct Summary on page 64

Configuring the Assessment Summary Panel

A summary of pupil/student assessment can be displayed in the Assessment Summary widget on the SIMS **Home Page**, enabling the monitoring of their progress.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Conduct Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Conduct Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).

1. In the appropriate **Assessment Summary** panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Assessment Summary** dialog.



Options button

2. Select the radio button of the required **Grid Type**. For more information on analysis types, please refer to the appropriate analysis type chapter in the *Analysis in SIMS* handbook.
3. Select the analysis you want to include in the summary, e.g. a **Result Set** analysis of all Key Stage 2 English Tests for Year 7.
4. Click the **Group Filter** Browser button to apply a filter to the analysis. For example, you may want to filter the analysis to include only pupil/students who are **Travellers**. For more information, please refer to the *Entering and Reviewing Data Using Marksheets* chapter in the *Administering Assessment* handbook.

NOTE: Any analysis set up for display in an **Assessment Summary** panel is saved on the SIMS **Home Page** and does not affect the analysis grids in SIMS Analysis.

5. Select the **Outcome Type** from the drop-down list. For more information, please refer to the *Getting Started with SIMS Analysis 7* chapter in the *Analysis in SIMS* handbook.
6. Select the **Rounding On** check box to apply rounding to the analysis results. For more information, please refer to the *Viewing and Editing an Analysis* chapter in the *Analysis in SIMS* handbook.
7. To clear the display and remove all of the filters, click the **Clear Selection** button.
8. Click the **Apply** button to save the panel configuration and return to the **SIMS Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Assessment Summary** panel that you have elected to display on your Home Page.

When you return to the **SIMS Home Page**, the panel name changes to the name of the analysis selected in Step 2.



More Information:

Adding Panels to the Home Page on page 82

Viewing the Assessment Summary on page 66

Configuring the Admissions Summary Panel

A summary of the pupil/student admissions can be displayed in the **Admissions Summary** widget on the **SIMS Home Page**, enabling a quick overview of the figures in bar chart format.

The content of the **Admissions Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the **SIMS Home Page** is not already open).

1. Click the **Options** button and then select **Configure** from the drop-down menu to display the **Admissions Summary Configuration** dialog.



Options button

2. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Admissions Summary**. To append the **Title** with the name of the selected group(s) (e.g. **Admissions Summary for Whole School, Admissions Summary for Year 8, etc.**), click the **Generate Title** button. Alternatively, enter a title of your choosing.

*NOTE: If multiple **Admissions Summary** widgets are displayed on the SIMS **Home Page**, use unique titles for each one to avoid confusion.*

3. Select a **Comparison** (if required) and a **Group Type** from the respective drop-down lists. Selecting a **Comparison** enables the **Toggle** option in the **Options** drop-down menu, enabling you to switch between the default view and the comparison view.

*NOTE: Viewing a comparison with **Yesterday, Last Week** or **Last Month** compares the statuses of the applications within the same **Admissions Year** and **Admissions Season** selected. Viewing a comparison with **Last Year** compares the information in the current academic year with the previous **Admissions Year** you selected.*

4. Select the relevant check box(es) in the **Select one or more groups to be included** panel. The options displayed are based on the **Group Type** selected.

5. Select the relevant check box(es) in the **Select Admission Year(s)** and **Select Admission Season(s)** panels.
6. Click the **Edit** button in the **Palette** panel to display the **Palette Editor**, where the colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page 118).
7. Enter the **Refresh rate (Hours:Minutes)** or use the **Up** and **Down** arrow buttons to select the required value. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
8. Click the **OK** button to save the panel configuration and return to the **SIMS Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Admissions Summary** panel that you have elected to display on the **SIMS Home Page**.



More Information:

Adding Panels to the Home Page on page 82

Viewing the Admissions Summary on page 68

Editing the Chart Colour Scheme

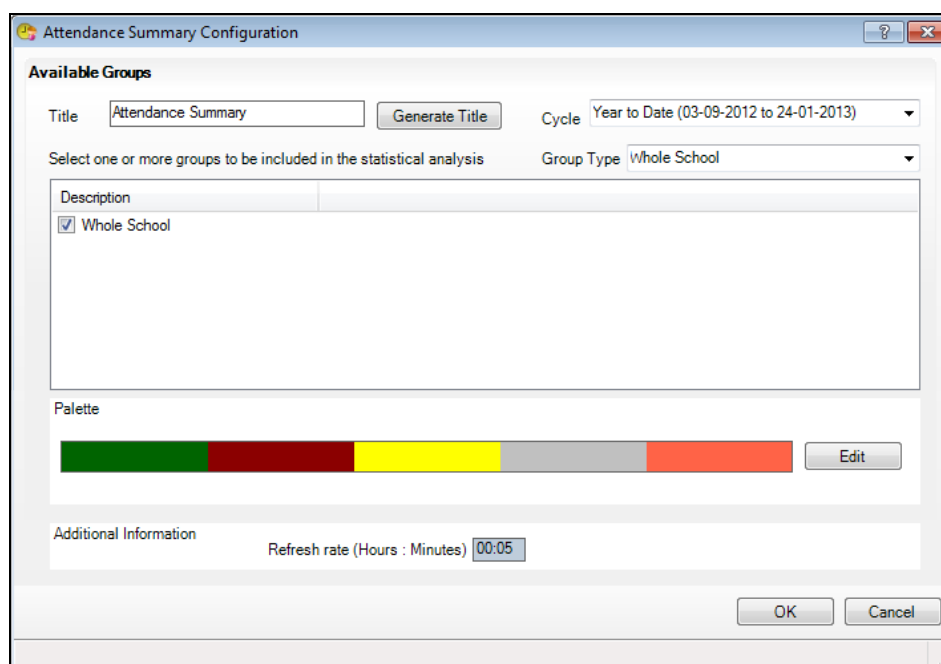
It is possible to edit the colour palette so that each segment of a chart displayed in a summary panel can be coloured differently. This functionality affects the Attendance Summary and the Conduct Summary panels.

This section assumes that the colours on the **Attendance Summary** panel are being configured and that the panel has already been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page 82). The functionality available in the **Conduct Summary** panel, relating to colour selection, works in the same way as it does in the **Attendance Summary** panel. The only difference is the wider range of palette colours that can be displayed on the graph.

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Attendance Summary** dialog.

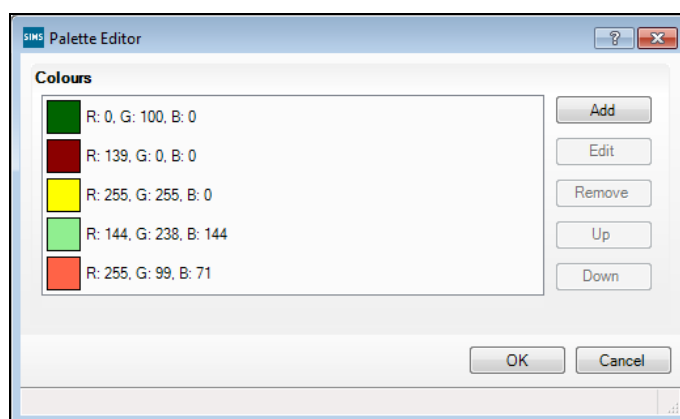


Options button



The colours displayed in the **Palette** section at the bottom of the dialog are the colours that are currently allocated to the graphs displayed in the **Attendance Summary** panel(s) on your Home Page. By default, Attendance Summary panels have five colours available immediately and Conduct Summary panels have 25 colours.

2. To edit the colours you wish to use, click the **Edit** button to display the **Palette Editor**.



3. Add a new colour to the palette by clicking the **Add** button to display the **Color** dialog, select the required colour then click the **OK** button. Alternatively, edit an existing colour by highlighting it, clicking the **Edit** button, selecting the required colour then clicking the **OK** button. The new or edited colour is displayed in the list of **Colours** in the **Palette Editor** dialog.
4. To remove a colour from the palette, highlight it then click the **Remove** button.

The display order of the colours can be amended, which in turn changes the meaning of the colour on the graph displayed on the summary panels.

5. To switch the order in which the colours are displayed (working downwards from the right-hand side of the pie chart, or working from left to right on the bar chart), click the **Up** and **Down** buttons. To remove a colour, highlight the colour and click the **Remove** button.
6. Click the **OK** button to confirm the colour changes.

*NOTE: When removing colours from the **Attendance Summary** pie chart, be aware that it is advisable to have at least the same number of colours as data types, otherwise existing colours may be used twice and could merge, making two segments appear as one.*

7. Click the **OK** button to return to the **Home Page**.

04 | Using the Pupil/Student Teacher View

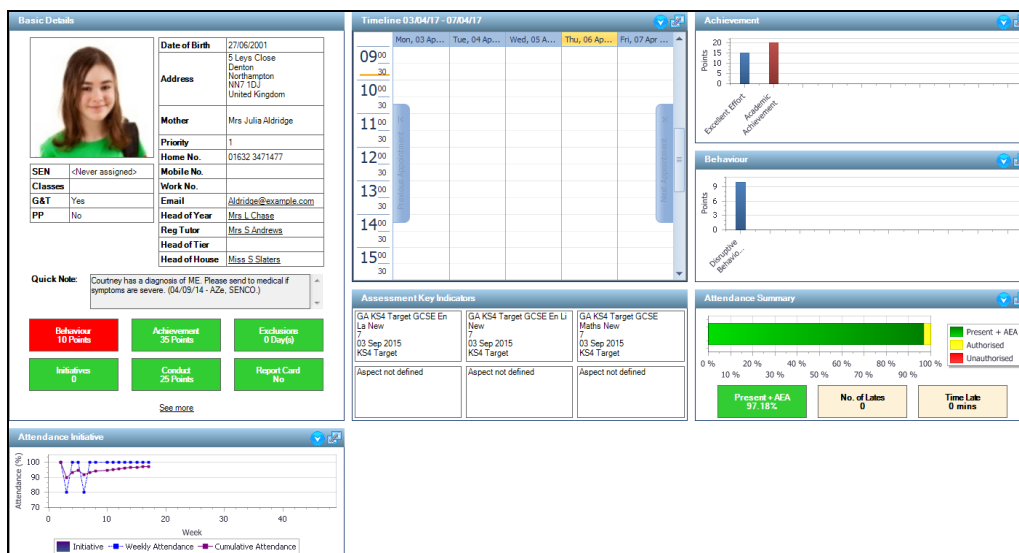
Introduction	121
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Printing the Pupil (or Student) Teacher View	143

Introduction

The Pupil (or Student) Teacher View provides a summary of the following pupil/student information in read-only format using *widgets*, which function in a similar way to those found on the SIMS **Home Page**:

- Basic details
- Timetable
- Achievements
- Behaviour incidents
- Assessment key indicators
- Attendance

- Attendance initiatives



Widgets are displayed on the Pupil (or Student) Teacher View by filling any available space on-screen to the right of an existing widget. Where there is no available space on the right-hand side of the screen, the widget is placed in the next available space on the following row. The display of the Pupil (or Student) Teacher View is scalable, therefore reducing the amount of 'white space' on-screen, i.e. reducing the size of the SIMS window alters the layout and re-places the individual widgets accordingly. If a widget is removed from display, the other widgets are re-placed so best use is made of the screen space available.

Some of the widgets enable additional functionality or provide links to other areas of SIMS. The functionality and links are described in the following sections.

The content and layout of the Pupil (or Student) Teacher View is determined partly by your System Manager/Administrator and partly by each SIMS user, providing you have sufficient permissions (please see *Accessing Additional Widget Options* on page 126).

To use the Pupil (or Student) Teacher View, you must be a member of one or more of the following user groups in SIMS System Manager:

- Assessment Co-ordinator
- Class Teacher
- Curricular Manager
- Pastoral Manager
- Registration Tutor
- SEN Co-ordinator
- Senior Management Team.



More Information:

Viewing Achievement Information on page 136
 Viewing Assessment Key Indicators on page 138
 Viewing the Attendance Summary on page 139
 Viewing Attendance/Conduct Initiative Information on page 141
 Viewing Behaviour Information on page 137
 General Functions Available on the Pupil (or Student) Teacher View on page 125
 Opening the Pupil (or Student) Teacher View on page 124
 Viewing a Pupil/Student's Timeline on page 131
 Viewing Basic Pupil/Student Details on page 127
 Viewing Behaviour, Achievement and Exclusion Details on page 130

Setting the Purpose of the Pupil/Student Button on the Quick Launch Toolbar

The default behaviour of the left-hand icon on the SIMS **Home Page** quick launch toolbar depends on the type of user:



Pupil (or Student) icon / Pupil (or Student) Teacher View icon

- When a Class Teacher clicks this icon, the **Pupil (or Student) Teacher View** is displayed by default.
- When any other user clicks this icon, the **Pupil (or Student) Details** page is displayed by default.

However, the default behaviour of this button can be toggled between the **Pupil (or Student) Teacher View** and the **Pupil (or Student) Details** page.

NOTE: This setting works on a per user basis, so the definition of the default behaviour of this button affects only the user who makes the change.

1. If you wish to change the default behaviour of the icon, either select or deselect the **Open Teacher View screen by default** check box in the **Teacher View Defaults** panel.

1 Teacher View Defaults

Open Teacher View screen by default ☒

2. Click the **Save** button.
3. Restart SIMS to affect the change of behaviour of this icon.

When you hover over the icon, its label changes to either **Pupil (or Student) Details** or **Pupil (or Student) Teacher View**, depending on the option selected.

Opening the Pupil (or Student) Teacher View

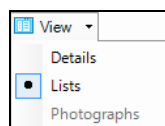
1. Select **Focus | Pupil (or Student) | Pupil (or Student) Teacher View** to display the **Find Student** browser.

Name	Year Group	YTI	Reg. Group	House	Gender	Admission Number
Abbess, Graham	8	8	8A	Boyle	Male	004504
Abbey, Grenetta	11	11	11F	Hooke	Female	003979
Abbey, Jimmy	13	13	G	Curie	Male	003599
Abbey, Sean	8	8	8B	Boyle	Male	004505
Abbot, Andrew	10	10	10E	Fleming	Male	004163
Abbot, Ben	11	11	11A	Newton	Male	004161
Abbot, Susan	12	12	L	Hooke	Female	003600

2. Enter either all or part of the pupil/student **Surname** and/or **Forename**, or enter their **Admission Number**.
3. Select applicable values from the various drop-down lists to further restrict the list of pupil/students returned.

By default, pupil/students with the **Status** of **Current** are listed but this can be changed by selecting from the drop-down list.

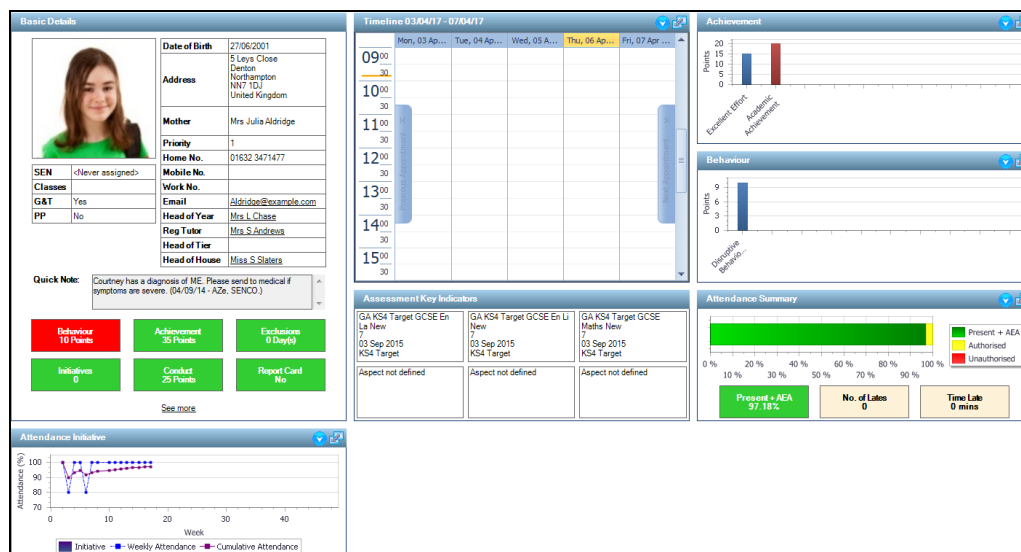
Leaving all fields as they are will display all current students.



If you prefer to search for **Lists** of pupil/students or would like to view pupil/students who have a **Photograph** attached to their details, select either of these options from the **View** drop-down list. The default search option is set to display **Details**.

4. Click the **Search** button to list all pupil/students who match the search criteria specified.

- Highlight the required pupil/student then click the **Open** button to display the **Pupil (or Student) Teacher View**. The pupil/student's name is displayed in the header of the page, together with the name of their class or registration group.



General Functions Available on the Pupil (or Student) Teacher View

A number of options are available for the majority of widgets on the Pupil (or Student) Teacher View. These are described in the following sections.

Toggling Between Minimised and Full Screen View of a Widget

Many of the widgets on the **Pupil (or Student) Teacher View** can be expanded to display its content in full screen mode. This is particularly useful if a widget contains a lot of information, which may be difficult to read in the default view.

Click the **Expand** button to maximise the required widget to full screen mode.

Once maximised, the widget can be reduced to its original size by clicking the **Restore** button.



Expand button



Restore button

If a widget is expanded when you exit SIMS, it will be restored to its original size the next time you log into SIMS.

The following widgets can be expanded to full screen view:

- Timeline
- Achievement
- Behaviour
- Attendance Summary

- Attendance Initiative/Conduct Initiative (when expanded, conduct and attendance are plotted on the same graph. Conduct can be monitored using the y1 axis and attendance can be monitored using the y2 axis).

Accessing Additional Widget Options

Many of the widgets on the Pupil (or Student) Teacher View can be configured on a per user basis.

Click the **Options** button to display a pop-up menu.



Options button

The options available depend on the nature of the widget.

The following widgets have additional options:

- Timeline
- Achievement
- Behaviour
- Attendance Summary
- Attendance Initiative.



More Information:

Viewing a Pupil/Student's Timeline on page 131

Viewing Achievement Information on page 136

Viewing Behaviour Information on page 137

Viewing the Attendance Summary on page 139

Viewing Attendance/Conduct Initiative Information on page 141

Viewing Basic Pupil/Student Details

The **Basic Details** widget on the Pupil (or Student) Teacher View displays a range of information about the selected pupil/student.



SEN	<Never assigned>
Classes	
G&T	Yes
PP	No

Date of Birth	27/06/2001
Address	5 Leys Close Denton Northampton NN7 1DJ United Kingdom
Mother	Mrs Julia Aldridge
Priority	1
Home No.	01632 3471477
Mobile No.	
Work No.	
Email	Aldridge@example.com
Head of Year	Mrs L Chase
Reg Tutor	Mrs S Andrews
Head of Tier	
Head of House	Miss S Slaters

Quick Note: Courtney has a diagnosis of ME. Please send to medical if symptoms are severe. (04/09/14 - AZe, SENCO.)

Behaviour
10 Points

Achievement
35 Points

Exclusions
0 Day(s)

Initiatives
0

Conduct
25 Points

Report Card
No

[See more](#)

If a photograph of the pupil/student is stored in SIMS, it is displayed in the top left-hand corner of the widget.

SEN, **Classes** (the class or lesson they are currently attending) and gifted and talented (**G&T**) summary information is displayed beneath the pupil/student's photograph. Clicking one of these headings opens the area in SIMS where this information is recorded, enabling you to edit the content.

Hyperlink	SIMS Functionality
SEN	Student SEN details page (also available via Focus Pupil (or Student) Special Educational Needs)
Classes	Classes for Student page (also available via Focus Pupil (or Student) Pupil (or Student) Details Links panel Classes)
G&T	Student SEN details page (also available via Focus Pupil (or Student) Special Educational Needs)

To facilitate the analysis of pupil/student learning needs, the Pupil Premium indicator (**PP**) is displayed. This functionality is available to Maintained schools in England only.

Pupil/student personal details are displayed on the right-hand side of the widget, together with contact details for the person with Priority 1 status.

NOTE: If more than one person has been assigned as the Priority 1 contact, the person who was first recorded as being the Priority 1 contact is displayed. A Primary telephone number (if recorded) is indicated by an asterisk (). If a Primary telephone number is not recorded, the Main number is displayed.*

Sending a SIMS Internal Message to Linked Staff

SIMS Internal messages can be sent to any of the people named on the Pupil (or Student) Teacher View.

1. Click the name of any of the following types of pupil/student contact to display the **Send Message** dialog.
 - **Head of Year**
 - **Reg Tutor**
 - **Head of Tier**
 - **Head of House**

Student

Name: Grenetta Abbey

Gender: Female

Year Group: Year 8

Reg Group: 8F

Recipient

Recipient Detail: Recipient Name: Miss F Burton

Message

Type: Student General Message Priority: Medium

Date: 10/01/2013 11:18

Subject: Grenetta Abbey | Female | Year 8 | 8F

Message: Grenetta's behaviour record is poor and additional efforts must be made to ensure that she behaves appropriately in class. Please advise all staff to monitor her behaviour.

Send Close

The **Pupil** (or **Student**) panel displays basic details about the selected pupil/student. The **Recipient** panel displays the name of the person to whom the message will be sent (**Recipient Name**).

- To record additional recipients of this message, click the **Add** button to display the **Select Recipients** dialog.

Title	Surname	Forename	Gender
Mrs	Abell	Anita	Female
Mrs	Andrews	Selina	Female
Mrs	Asher	Dawn	Female
Mr	Atkinson	John	Male
Miss	Batchley	Andrea	Female
Mr	Blackler	Adrian	Male
Mr	Brown	James	Male
Mr	Brown	Paul	Male
Miss	Burrows	Katie	Female
Miss	Burton	Fiona	Female

- Search for, then highlight the required recipient(s). Multiple recipients can be selected using **Ctrl + click** (to select multiple individuals) and **Shift + click** (to select a block of recipients).
- Click the **Add** button to add them as a recipient.
- Click the **OK** button to return to the **Send Message** dialog. The people selected are displayed in the **Recipient Detail** table. People can be removed from the list of recipients by highlighting their name then clicking the **Remove** button.

The **Message** panel enables you to define the content of the message.

- Select the message **Type** from the drop-down list. This defaults to **Student General Message**.
- Select the **Priority** of the message from the drop-down list. If the intended recipient has enabled this functionality, notification of the receipt of a **High** priority message is displayed in a pop-up window on the bottom right-hand corner of the SIMS screen. The notification for high priority messages can be enabled via **Tools | Setup Message Options**.

The **Date** field is populated automatically.

The **Subject** field is populated automatically with the pupil/student's name, gender, year group and registration group/class but can be edited.

- Enter the required **Message** text.
- Click the **Send** button.

The message is sent to the intended recipients and can be viewed via the **My Messages** panel on their SIMS **Home Page**. All sent messages are retained and can be accessed via **Focus | Alerts | General Messages**.

Viewing the Quick Note

Providing you have sufficient permissions, any important notes that have been recorded as a **Quick Note** are available to view.

Viewing Behaviour, Achievement and Exclusion Details

The bottom section of the **Basic Details** widget provides a summary of the pupil/student's behaviour, achievement and exclusion records for the current academic year. The boxes are colour coded green (indicating generally good behaviour, good level of achievement, etc.) and red (indicating generally poor behaviour, conduct, etc.). The colour of the boxes depends on the range of values entered during the Pupil (or Student) Teacher View setup process.

You can display the area in SIMS where the data is recorded by clicking in the appropriate box.

Hyperlink Name	SIMS Functionality Displayed
Behaviour	Behaviour Management page (also available via Focus Behaviour Management Pupil (or Student) Behaviour Behaviour panel)
Achievement	Behaviour Management page (also available via Focus Behaviour Management Pupil (or Student) Behaviour Achievement panel)
Exclusions	Exclusion Details page (also available via Focus Pupil (or Student) Exclusions)
Initiatives	Behaviour Management page (also available via Focus Behaviour Management Pupil (or Student) Behaviour Initiatives panel)
Conduct	Behaviour Management page (also available via Focus Behaviour Management Pupil (or Student) Behaviour Net Points in the Academic Year panel)
Report Card	Behaviour Management page (also available via Focus Behaviour Management Pupil (or Student) Behaviour Report Card panel)

Viewing Emergency Contact Details for the Selected Pupil/Student

Click the **See more** hyperlink at the bottom of the **Basic Details** widget to display the **Pupil (or Student) Emergency contacts** dialog.

Any contact with a Priority 1 or 2 setting is displayed. A Primary telephone number (if recorded) is indicated by an asterisk (*). If a Primary telephone number is not recorded, the Main number is displayed. If an email address has been recorded for this contact, an email can be sent by clicking the address in the **Email** field to open a blank but addressed message in your default email client.

Click the **Cancel** button to return to the Pupil (or Student) Teacher View.

Viewing a Pupil/Student's Timeline

The pupil/student's timetable is displayed in the **Timeline** widget on the Pupil (or Student) Teacher View.

Timeline 21/01/13 - 25/01/13					
	Mon, 21 Jan 2...	Tue, 22 Jan 2...	Wed, 23 Jan 2...	Thu, 24 Jan 2...	Fri, 25 Jan 2013
09:00	09:15-10:15 10x/Fr2 L7 JL	09:15-10:15 10x/Sc3 S9 SA	09:15-10:15 10x/Sc3 S9 SA	09:15-10:15 10C/Bs1 B2 PH	09:15-10:15 10x/Re3 H2 AB
10:00	10:15-11:15 10C/Bs1 B2 PH	10:15-11:15 10x/Fr2 L7 JL	10:15-11:15 10x/Sc3 S9 SA	10:15-11:15 10C/Bs1 B2 PH	10:15-11:15 10x/Ma3 M3 FB
11:00					
12:00	11:35-12:35 10x/Sc3 S9 SA	11:35-12:35 10A/Dc1 T2 EW	11:35-12:35 10A/Dc1 T2 EW	11:35-12:35 10B/Gg1 H1 AS	11:35-12:35 10B/Gg1 H1 AS
13:00	12:35-13:35 10x/Ma3 M3 FB	12:35-13:35 10x/Ma3 M3 FB	12:35-13:35 10A/Dc1 T2 EW	12:35-13:35 10B/Gg1 H1 AS	12:35-13:35 10x/Fr2 L7 JL
14:00					
15:00	14:30-15:30 10x/En3 E6	14:30-15:30 10x/Pe3 GYM	14:30-15:30 10x/En3 E6	14:30-15:30 10A/Ps E3	14:30-15:30 10x/En3 E6

By default, the selected pupil/student's timetable is displayed for the current working week. Today's date is indicated on the timeline by a yellow highlight on the date in the heading row. In the previous graphic, today's date is Monday 21 January 2013. The scope of the view is displayed in the panel header. In the previous graphic, the timetable for the period Monday 21 January 2013 to Friday 25 January 2013 is displayed.

NOTE: The current time can be deduced by viewing the intersection of the highlighted date in the column header and the highlighted time bar displayed in the row header.

A pupil/student's lessons, scheduled detention sessions and SEN reviews are displayed over the selected timeframe. Detention sessions that a pupil/student is scheduled to attend are displayed with a red background and SEN reviews are displayed with an amber background, as displayed in the following graphic.

Timeline 25/02/13 - 01/03/13					
	Mon, 25 Feb 201	Tue, 26 Feb 201	Wed, 27 Feb 20	Thu, 28 Feb 201	Fri, 01 Mar 2013
09:00	09:15-10:15 8y/En1 E2 FT	09:15-10:15 8y/Ma2 M1 CJ	09:15-10:15 8y/Pe2 SH1 JY	09:15-10:15 8y/En1 E2 FT	09:15-10:15 8y/Ge2 L3 MK
10:00	10:15-11:15 8y/Fr2 L3 MK	10:15-11:15 8y/En1 E2 FT	10:15-11:15 8F/Sc S4 JF	10:15-11:15 8y/Mu1 MUS GD	10:15-11:15 8y/En1 E2 FT
11:00					
12:00	11:35-12:35 8y/Te3 T3 GR	11:35 8F/Sc S4	11:35-12:35 8F/Gg H5 AL	11:35-12:35 8F/Re H6 KJ	11:35-12:35 8y/Ma2 M1 CJ
13:00	12:35-13:35 8y/Te3 T3 GR	12:35 8F/Sc S4	12:35-13:35 8y/Ma2 M1 CJ	12:35-13:35 8y/Fr2 L3 MK	12:35-13:35 8F/H1 H1 AS
14:00					
15:00	14:30-15:30 8y/Ma2 M1	14:30-15:30 8y/Te3 T3	14:30-15:30 8y/Mu1 MUS	14:30-15:30 8F/Ps S1	14:30-15:30 8y/Pe2 SH1

In the previous graphic, a detention session has been scheduled for 15:30-16:00 on Tuesday 26 February 2013. Additionally, a SEN review has been scheduled for 12:30-13:30 on the same date. Only one box per class is displayed, regardless of how many teachers are associated with the group.

The range of options available on the **Timeline** widget are discussed in the following sections.



More Information:

Changing the Displayed Date of the Timeline on page 132

Changing the Timeline View on page 133

Printing the Content of the Timeline Widget on page 134

Sending a Message to Staff on page 136

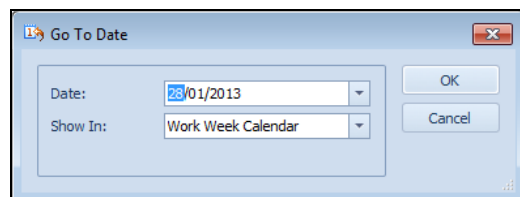
Changing the Displayed Date of the Timeline

By default, the selected pupil/student's timetable is displayed for the current working week. This can be changed using right-click functionality in the date bar at the top of the **Timeline** widget. This can be used in conjunction with the **View** options (please see *Changing the Timeline View on page 133*) to present the required display.

Right-click a date in the heading row at the top of the **Timeline** widget to display a pop-up menu.

Mon, 21 Jan 2... Tue, 22 Jan 2... Wed, 23 Jan 2... Thu, 24 Jan 2... Fri, 25 Jan 2013

- To go to a specific date, select **Go to Date** to display the **Go To Date** dialog.



- Enter the required **Date** or select a date from the drop-down list.
 - Select the required timeline view from the **Show In** drop-down list. The options are **Day Calendar**, **Work Week Calendar**, **Week Calendar**, **Month Calendar**.
 - Click the **OK** button to return to the Timeline widget.
- To revert to today's date, select **Go to Today**.

NOTES: The date selected will show the **Timeline** for that date in the selected view (please see *Changing the Timeline View on page 133*).

The display settings are reset the next time you open the Pupil (or Student) Teacher View.

Changing the Timeline View

The display can be amended to show a pupil/student's timetable in one of the following formats:

Timeline View	What is Displayed?
Day View	Displays the pupil/student's timetable for today only.
Work Week View	Displays the pupil/student's timetable for the current working week. This is the default view.
Week View	Displays only events for which the pupil/student is timetabled for the whole week (including weekends).
Month View	Displays only events for which the pupil/student is timetabled for the whole month (including weekends).

Right-click a date in the column heading at the top of the **Timeline** widget to display a pop-up menu. Alternatively, right-click a time in the row headings to access the same functionality.

Mon, 21 Jan 2... Tue, 22 Jan 2... Wed, 23 Jan 2... Thu, 24 Jan 2... Fri, 25 Jan 2013

Select **Change View To** then one of the following options to achieve the required view:

- Day View
- Work Week View (default)
- Week View
- Month View.

*NOTES: The view selected will show the **Timeline** for the selected timeframe (please see Changing the Displayed Date of the Timeline on page 132).*

The display settings are reset the next time you open the Pupil (or Student) Teacher View.

Changing the Interval of the Timeline Widget

The time interval can be amended to show the content of the **Timeline** widget in greater detail.

Right-click a date in the row heading on the **Timeline** widget to display a pop-up menu.

09 ⁰⁰
30
10 ⁰⁰
30
11 ⁰⁰
30
12 ⁰⁰
30
13 ⁰⁰
30
14 ⁰⁰
30
15 ⁰⁰
30

The previous graphic shows a 30 minute time interval.

Select one of the following options to achieve the required view:

- 60 Minutes
- 30 Minutes
- 15 Minutes
- 10 Minutes
- 6 Minutes
- 5 Minutes.

NOTES: The current selection is indicated by a tick in the pop-up menu.

*The more regular the interval, the more detailed the view on the **Timeline** widget.*

The display settings are reset the next time you open the Pupil (or Student) Teacher View.

Printing the Content of the Timeline Widget

The content of the **Timeline** widget can be printed. This is the only widget that can be printed independently of the other widgets.

The printed output produces the view of the Timeline displayed on-screen at the time of printing. Therefore, you must prepare the **Timeline** (i.e. select the required timeframe, the view and the interval) prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the **Preview** page.



Options button

Green Abbey School

Grenetta Abbey [8F]

25 February -

01 March 2013

February 2013

M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

March 2013

M	T	W	T	F	S	S
					1	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

	25 February	26 February	27 February	28 February	01 March
09⁰⁰	09:15-10:15 8y/En1 E2 FT	09:15-10:15 8y/Ma2 M1 C	09:15-10:15 8y/Pe2 SH1 JY	09:15-10:15 8y/En1 E2 FT	09:15-10:15 8y/Ge2 L3 MK
10⁰⁰	10:15-11:15 8y/Fr2 L3 MK	10:15-11:15 8y/En1 E2 FT	10:15-11:15 8F/Sc S4 JF	10:15-11:15 8y/Mu1 MUS GD	10:15-11:15 8y/En1 E2 FT
11⁰⁰					
12⁰⁰	11:35-12:35 8y/Te3 T3 GR	11:35-12:35 8F/Sc S4 JF	11:35-12:35 8F/Gg H5 AL	11:35-12:35 8F/Re H6 KJ	11:35-12:35 8y/Ma2 M1 C
13⁰⁰	12:35-13:35 8y/Te3 T3 GR	12:35-13:35 8F/Sc S4 JF	12:35-13:35 8y/Ma2 M1 C	12:35-13:35 8y/Fr2 L3 MK	12:35-13:35 8F/Hi H1 AS
14⁰⁰					
15⁰⁰	14:30-15:30 8y/Ma2 M1 C	14:30-15:30 8y/Te3 T3 GR	14:30-15:30 8y/Mu1 MUS GD	14:30-15:30 8F/Ps S1 AA	14:30-15:30 8y/Pe2 SH1 JY

Abell Anita
1/1
26/02/2013 11:03:22

The preview displays your school name and the pupil/student to whom the timeline relates. The timeframe of the timeline is also displayed, as are minimised calendars for the current and following month. On the minimised calendars, the days that contain a scheduled lesson, detention session or SEN review are displayed in bold.

2. Click the **Print** button to print the pupil/student's timetable

Alternatively, the entire content of the Pupil (or Student) Teacher View can be printed (please see *Printing the Pupil (or Student) Teacher View* on page 143).



More Information:

Changing the Displayed Date of the Timeline on page 132

Changing the Timeline View on page 133

Changing the Interval of the Timeline Widget on page 134

Sending a Message to Staff

The **Timeline** widget provides the facility to send a General Message to the pupil/student's class teachers.

To send a message to all staff referenced on the pupil/student's **Timeline**, click the **Options** button then select **Message All Staff** from the pop-up menu to display the **Send Message** dialog.



Options button

To send a message to the main teacher of a specific class, either double-click the required class on the **Timeline** widget or right-click the class then select **Send Message** from the pop-up menu to display the **Send Message** dialog.

Follow the instructions earlier in this handbook (please see *Sending a SIMS Internal Message to Linked Staff* on page 128) to send the message to the required recipients. When reading the instructions, please note that the **Recipient** panel is populated automatically with the appropriate member(s) of staff.

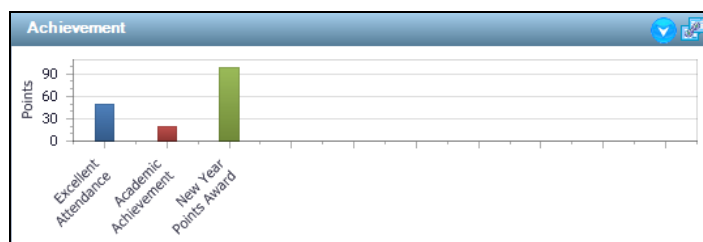


More Information:

Sending a SIMS Internal Message to Linked Staff on page 128

Viewing Achievement Information

A summary of a pupil/student's achievements can be displayed on the Pupil (or Student) Teacher View, enabling the monitoring of their progress.



Each achievement recorded for a pupil/student over the course of the current academic year is displayed on a bar chart. The horizontal axis displays each of the achievement types for which an award has been given. The cumulative number of points or number of incidents (as defined during the Pupil (or Student) Teacher View setup process) for each of the achievement types is measured using the vertical axis.

Hover the mouse over a bar to display the number of points awarded for the achievement type or the number of incidents.

The data used to build the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.



Options button

Achievement		
Date	Type	Points
22/01/2013	Excellent Attendance	50
16/01/2013	Academic Achievement	20
03/09/2012	New Year Points Award	99

The **Date** of the achievement, the achievement **Type** and the number of **Points** awarded for each achievement is displayed in table format.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Achievement** widget then select **Date**, **Type** or **Points** from the pop-up menu to display the content in the selected order.

Achievement		
Date	Type	Points
Date: 03/09/2012		
03/09/2012	New Year Points Award	99
Date: 16/01/2013		
16/01/2013	Academic Achievement	20
Date: 22/01/2013		
22/01/2013	Excellent Attendance	50

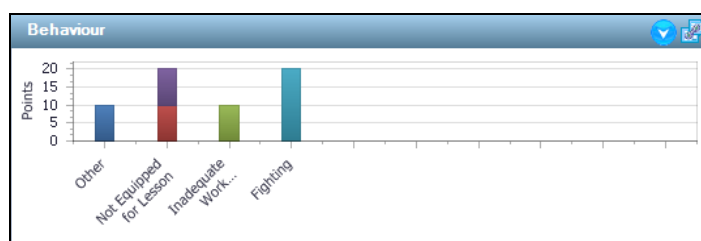
Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To view the full achievement record, double-click the required achievement to display the **Edit Achievement** dialog. The information is displayed in read-only format.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

Viewing Behaviour Information

A summary of a pupil/student's behaviour incidents can be displayed on the Pupil (or Student) Teacher View, enabling the monitoring of their progress.



Each behaviour incident recorded for a pupil/student over the course of the current academic year is displayed on a bar chart. The horizontal axis displays each of the behaviour types associated with each of the behaviour incidents recorded against the pupil/student. The cumulative number of points or number of incidents (as defined during the Pupil (or Student) Teacher View setup process) for each of the behaviour types is measured using the vertical axis.

Hover the mouse over a bar to display the number of points associated with the behaviour type or the number of incidents.

The data used to build the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.



Options button

Behaviour		
Date	Type	Points
10/09/2012	Other	10
10/09/2012	Not Equipped for Lesson	10
10/09/2012	Inadequate Work in Class	10
10/09/2012	Not Equipped for Lesson	10
10/09/2012	Fighting	20

The **Date** of the incident, the behaviour **Type** and the number of **Points** assigned for each incident is displayed in table format.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Behaviour** widget then select **Date**, **Type** or **Points** from the pop-up menu to display the content in the selected order.

Behaviour		
Date	Type	Points
Points: 10		
10/09/2012	Other	10
10/09/2012	Not Equipped for Lesson	10
10/09/2012	Inadequate Work in Class	10
10/09/2012	Not Equipped for Lesson	10
Points: 20		
10/09/2012	Fighting	20

Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To view the full behaviour record, double-click the required behaviour incident to display the **Edit Behaviour** dialog. The information is displayed in read-only format.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

Viewing Assessment Key Indicators

The **Assessment Key Indicators** widget displays up to six definable aspects and their progress.

Assessment Key Indicators		
Science Attainment Level 5C 17 Jul 2012 Year 8 Autumn Term	Maths Attainment Level 6C 17 Jul 2012 Year 8 Autumn Term	English Attainment Level 5A 17 Jul 2012 Year 8 Autumn Term
Aspect not defined	Aspect not defined	Aspect not defined

The previous graphic shows that three aspects have been selected for display during the Pupil (or Student) Teacher View setup process. The remaining three panels have not been defined and display **Aspect not defined**.

The aspect name, grade, date and result set are displayed. The background colour of a box is determined by the associated marksheet template. If the associated marksheet template contains a grade formula column that incorporates a colour background, the colour associated with the formula outcome is displayed.

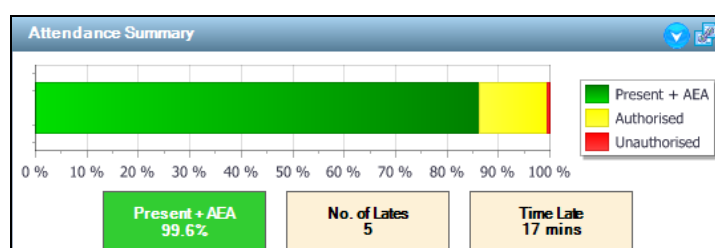


Additional Resources:

For more information on setting up marksheet templates, please refer to the *Creating and Maintaining Templates* chapter of the *Creating Assessment Related Components* handbook

Viewing the Attendance Summary

A summary of a pupil/student's attendance record can be displayed on the Pupil (or Student) Teacher View, enabling the monitoring of their progress.



A pupil/student's attendance over the course of the current academic year is displayed on a vertical bar chart. The legend on the right-hand side of the widget displays the scope of the chart, which is the display of all **Present + AEA** (Authorised Educational Activity) marks, together with **Authorised** and **Unauthorised** absences. The horizontal axis displays the cumulative percentage of these marks, starting with a green bar (for present marks), a yellow bar (authorised absences) and a red bar (unauthorised absences).

Hover the mouse over the bar to display the number and percentage of sessions or lessons in each category.

The data used to build the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

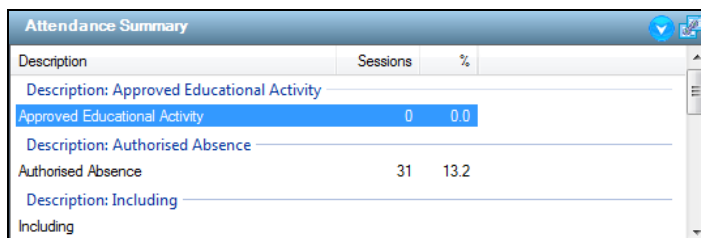


Options button

Attendance Summary		
Description	Sessions	%
Present	202	86.3
Authorised Absence	31	13.2
Unauthorised Absence	1	0.4
Possible Attendances	234	
Including		
Approved Educational Activity	0	0.0
Late before reg closed	5	2.1
Late after reg closed	0	0.0

The attendance code **Description**, number of **Sessions** and a percentage (%) of total attendance for each attendance code is displayed.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Attendance Summary** widget then select **Description**, **Sessions** or **%** from the pop-up menu to display the content in the selected order.



Description	Sessions	%
Description: Approved Educational Activity		
Approved Educational Activity	0	0.0
Description: Authorised Absence		
Authorised Absence	31	13.2
Description: Including		
Including		

Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

Additional information regarding the pupil/student's attendance is available below the graph. The number of lates (**No. of Lates**) and the cumulative number of minutes for all sessions or lessons with a late mark (**Time Late**) are displayed.

A pupil/student's total **Present & AEA** percentage is also displayed. This box is colour coded green (indicating a generally good, positive attendance record) or red (indicating a generally poor attendance record). The colour of the box depends on the range of values entered during the Pupil (or Student) Teacher View setup process (via **Tools | Setups | Pupil (or Student) Teacher View**).

The percentage attendance figure is calculated as follows:

Percentage Attendance = <number of present marks> plus <number of approved educational absence marks> divided by <number of possible marks>

To view a pupil/student's full attendance record, click the **Present & AEA** hyperlink to display the **Pupil (or Student) Marks** page. The information is displayed in read-only format.

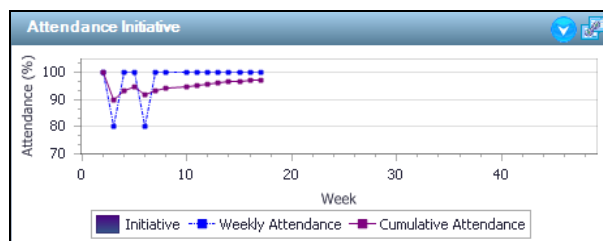
IMPORTANT NOTES: *Authorised Educational Activity marks are treated as a present mark on the Pupil (or Student) Teacher View.*

If a mark is entered in Take Register for a future session or lesson, this is included in the figures on the Pupil (or Student) Teacher View.

Viewing Attendance /Conduct Initiative Information

A summary of a pupil/student's attendance and conduct records can be displayed on the Pupil (or Student) Teacher View, together with pupil/student initiative dates, enabling the monitoring of their progress.

The view can be toggled between **Attendance Initiative** and **Conduct Initiative** by clicking the **Options** button then selecting **Toggle** from the drop-down menu. The **Attendance Initiative** widget is displayed by default.



A pupil/student's session (not lesson) attendance over the course of the current academic year is displayed on a line graph on the **Attendance Initiative** widget. The x-axis (horizontal) represents the working week of the academic year for which attendance can be recorded, i.e. attendance is not recorded during school holidays so these weeks (if they are complete working weeks) are not plotted on the graph. If a school holiday ends on one day of a working week and a new term starts on the next day of a working week, these partial working weeks are displayed on the graph. The attendance percentage values are displayed on the y-axis (vertical). Two sets of values are plotted on the line graph - the cumulative attendance percentage over the course of the current academic year and a separate weekly attendance percentage. In the previous graphic, the cumulative attendance percentage remained at 100% until week 21, when the pupil/student was present for only 33% of their sessions, indicated by the dotted blue line. This caused the cumulative attendance percentage (the dotted purple line) to be reduced to 99% in week 21.

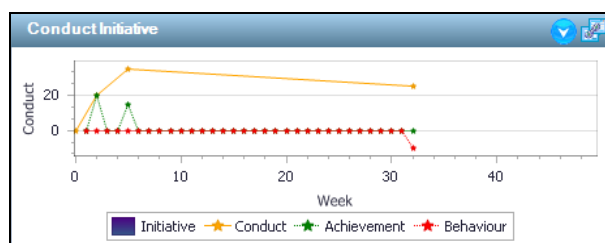
The percentage attendance figure is calculated as follows:

**Percentage Attendance = <number of present marks> plus
<number of approved educational absence marks> divided by
<number of possible marks>**

Hover the mouse over any of the dots on the line graph. The following information is displayed:

- Week commencing date
- Cumulative attendance percentage or weekly attendance percentage (depending on the line over which you hover, displayed to two decimal places)
- Number of present marks (**Present + AEA**)
- Number of authorised absence marks
- Number of unauthorised absence marks.

If an initiative record has been recorded against a pupil/student's behaviour record, this is indicated by a vertical purple line in the corresponding week. The initiative(s) displayed on the Attendance Initiative graph may not relate specifically to attendance. However they are displayed to provide an indication of whether (and subsequently how) a pupil/student's attendance or behaviour has changed since the initiative measures were introduced. Hover the mouse over the initiative line to display the week commencing date, the date on which the initiative was made and the initiative type.



A pupil/student's conduct, behaviour and achievement details over the course of the current academic year are displayed on a line graph on the **Conduct Initiative** widget. The x-axis (horizontal) represents the working week of the academic year for which these details can be recorded, i.e. conduct, behaviour and achievement are not recorded during school holidays so these weeks (if they are complete working weeks) are not plotted on the graph. If a school holiday ends on one day of a working week and a new term starts on the next day of a working week, these partial working weeks are displayed on the graph. The conduct point values are displayed on the y-axis (vertical). Three sets of values are plotted on the line graph - conduct (yellow line), achievement (green line) and behaviour points (red line) over the course of the current academic year. In the previous graphic, achievement points (also viewed as a positive) were recorded in week one and behaviour points (viewed as a negative) were recorded in week two. Conduct points (an aggregate of achievement and behaviour points) were therefore recorded in weeks one and two.

Hover the mouse over any of the dots on the line graph. The following information is displayed:

- Week commencing date
- Date on which conduct, achievement or behaviour points were recorded (depending on the line over which you hover)
- Achievement type or behaviour type recorded

If an initiative record has been recorded against a pupil/student's behaviour record, this is indicated by a vertical purple line in the corresponding week. Hover the mouse over the initiative line to display the week commencing date, the date on which the initiative was made and the initiative type.

Printing the Pupil (or Student) Teacher View

The content of the **Pupil (or Student) Teacher View** can be printed by clicking the **Print** button at the top of the page.

The **Pupil (or Student) Teacher View** is displayed in your web browser, from where it can be printed. The printed output is displayed in single column format. The **Basic Details** are printed as the first item on the output, followed by the **Timeline** (if you have elected to display it) then any of the additional widgets you have elected to display. The content of the additional widgets is printed in the order defined on the **Pupil (or Student) Teacher View Setup** page (via **Tools | Setups | Pupil (or Student) Teacher View**).

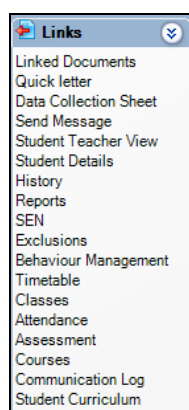
*NOTE: It is not possible to print individually the content of a widget, with the exception of the **Timeline** widget (please see Printing the Content of the Timeline Widget on page 134).*

05 | Using the Pupil/Student Links Panel

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Introduction

The **Links** panel can be used to access other functional areas in SIMS which are directly related to the current page. For example, if you are viewing or editing pupil/student details, the **Links** panel provides shortcuts to the associated information such as Attendance, Assessment, Special Educational Needs (SEN) details, etc. This is particularly useful for example, when senior staff are preparing for a meeting with parents and wish to review key information relating to a particular pupil/student.



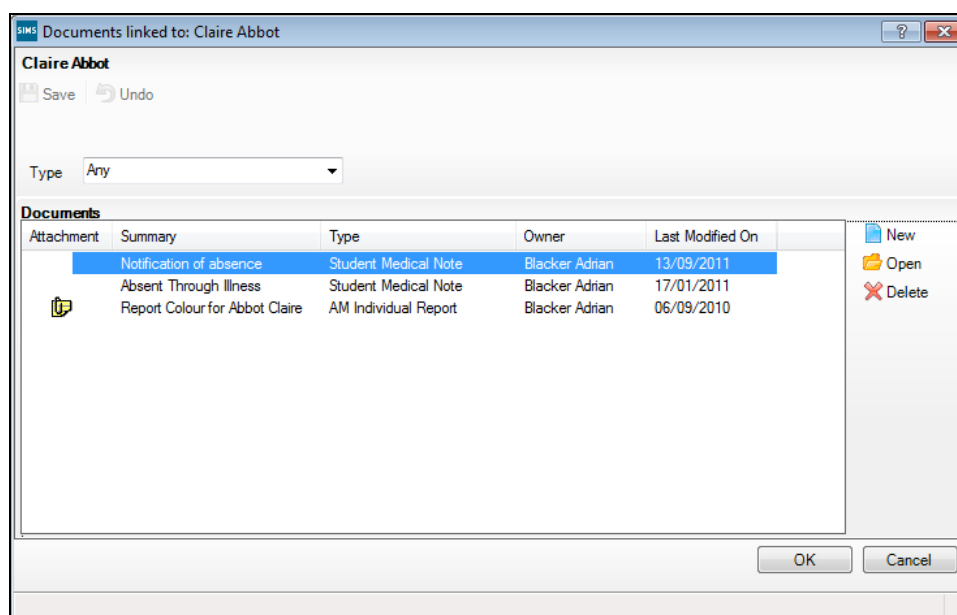
Links are accessed from the **Links** panel located on the right hand side of the page.

Click an option in the **Links** panel to select it. The preceding example is based on the **Links** panel accessed from the **Pupil** or **Student Details** page.

Maintaining Linked Notes/Documents

It is possible to attach documents in various areas of SIMS. Any documents that have been attached to the selected pupil/student's record can be viewed by selecting the **Linked Documents** option. This option can also be used to add additional documents.

Linked documents can include medical notes, SEN statements and SEN full descriptions, letters to parents, etc.



1. To filter the list to display only documents of a particular **Type**, select an option from the drop-down list. The options available are limited to the types of document currently linked to the pupil/student or applicant.

2. Highlight the required document then click the **Open** button to display its details in the **Edit Note / Document** dialog.

SIMS Edit Note/Document: Absent Through Illness

Edit note/document

Type: Student Medical Note Status: Public

Summary: Absent Through Illness

Note: Mrs Abbot sent email to say that Claire now has flu and unlikely to return to school this week.

Attachment

Attachment:

Last uploaded: View Open

Document Log

Date	Owner	Author of change
17/01/2011 09:59:00	Blackler Adrian	Blackler Adrian

Print

OK Cancel

3. Any attachment can be viewed by clicking the **View** button, or edited, if required (and if you have applicable permissions), by clicking the **Open** button, making any changes to the document and clicking the **OK** button to save the changes.
4. The **Document Log** panel shows when it was uploaded to the DMS followed by any subsequent edits including the **Date** the changes were made, the original **Owner** and the name of the **Author of Change** who modified the document. This log can be printed if required by clicking the **Print** button.

Attaching a New Note / Document

There are various areas in SIMS where notes and documents can be attached to a record. The panel names may differ and the document **Type** required may differ, but the process of adding notes and documents is the same in each case. The following process describes how to add notes and documents from the **Add Note / Document** dialog.

1. Click the **New** button and select the appropriate type of document (if required) to display the **Add Note / Document** dialog.

2. Select the **Status** of the document from the drop-down list.
 - **Public** – the document will be available to all users with sufficient add/view/edit document permissions.
 - **Private** – the document will be available only to you.
 - **Confidential** – the document will be available only to SIMS users with School Administrator or Senior Management Team permissions.
3. If it is not already populated, enter a clear and concise **Summary** together with any further detail in the **Notes** field. This information can be useful for any reader of the attached and also if the document ever becomes detached from the pupil/student record. If you do not want to add an attachment, click the **OK** button at this point.
4. To add an **Attachment**, click the **Browse** button adjacent to the **Attachment** field and navigate to the location of a previously stored file.
5. Highlight the required document and click the **Open** button to attach it to the record.
6. Click the **OK** button to save the attachment.

The **Last Uploaded** field remains empty until you have saved the record, then you are able to view the date and time of the last file upload, together with the name of the user who uploaded it.

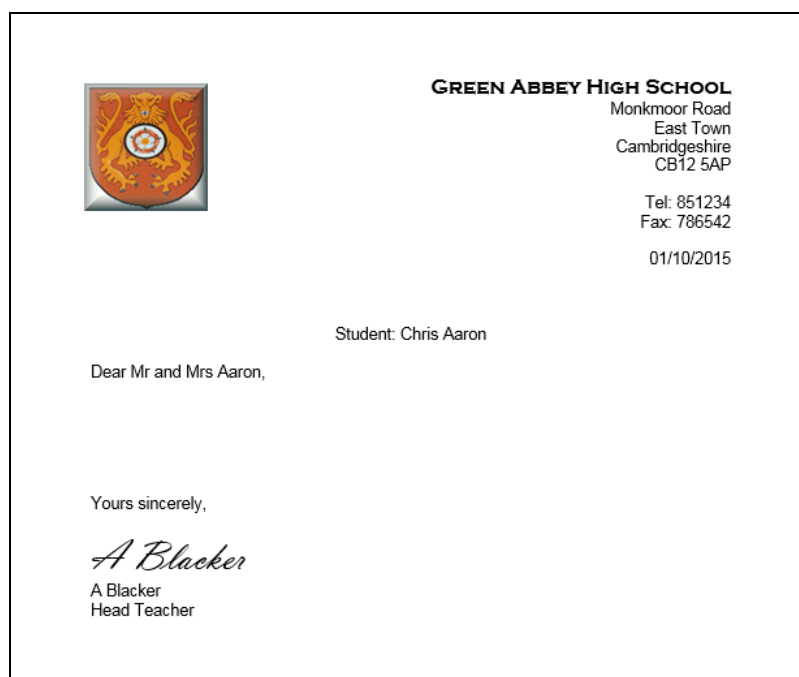
It is possible to **View** or **Open** the attached document by clicking the respective buttons adjacent to the **Last Uploaded** field. The **View** button enables users with insufficient permissions to simply read the contents of the attachment. These users are not able to amend or edit attachments and the attachments are opened as read-only.

The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When an attachment has been opened and amended and the **Save** button is clicked on the main page, an **Upload modified documents** dialog is displayed. Select the **Status** check box and click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.

A **Document Log** at the bottom of the **Edit Note / Document** panel records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. This log can be printed for future reference by clicking the **Print** button.

Producing a Quick Letter

The **Quick Letter** option launches Microsoft® Word with a predefined letter template displayed complete with the relevant salutation and address information for the selected pupil/student's parents or contacts.



Enter the required text in the body of the letter before printing and/or saving.

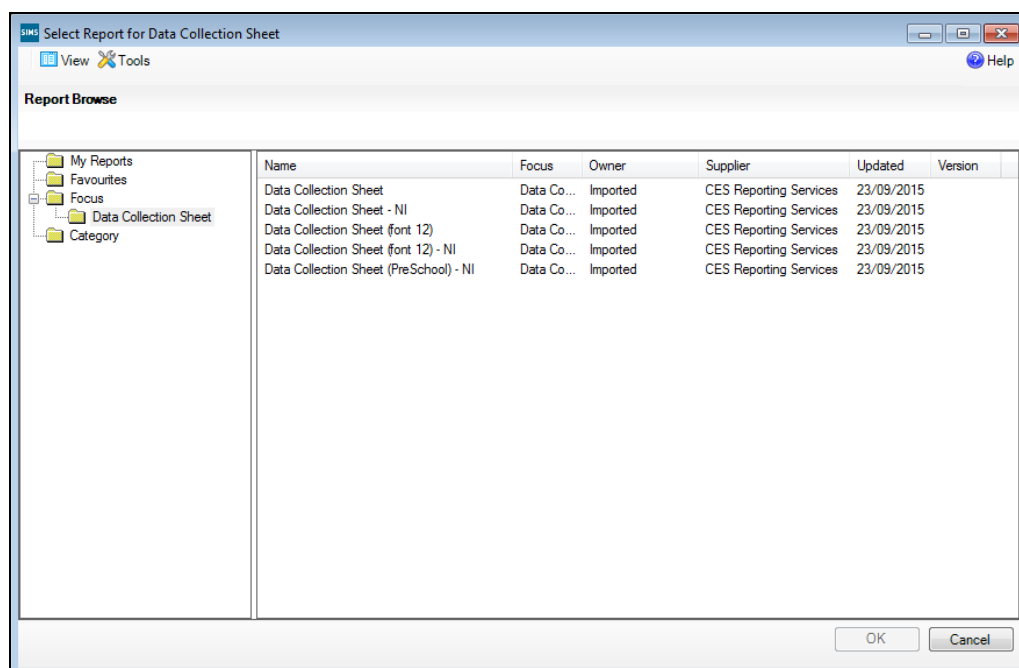


Additional Resources:

General SIMS Setups chapter of the *Setting up and Administering SIMS* handbook

Creating Data Collection Sheets

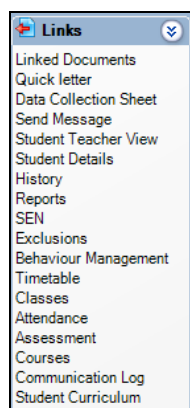
The **Data Collection Sheet** option displays the **Select Report for Data Collection Sheet** dialog enabling you to select the required data collection sheet report.



Navigate to the required report then click the **OK** button to produce the data collection sheet.

Sending Pupil / Student Related Messages

The **Send Message** option on the pupil/student **Links** panel is used to send a message about the selected pupil/student to one or more recipients.



The relevant pupil/student's **Name**, **Gender**, **Year Group** and **Class/Reg Group** will be entered automatically. These cannot be amended.

1. From the **Recipient** panel, click the **Add** button to display the **Select Recipients** dialog.

Title	Surname	Forename	Gender
Mrs	Abell	Anita	Female
Mrs	Andrews	Selina	Female
Mrs	Asher	Dawn	Female
Mr	Atkinson	John	Male
Miss	Batchley	Andrea	Female
Mr	Blackler	Adrian	Male
Mr	Brown	James	Male
Mr	Brown	Paul	Male
Miss	Burrows	Katie	Female
Miss	Burton	Fiona	Female

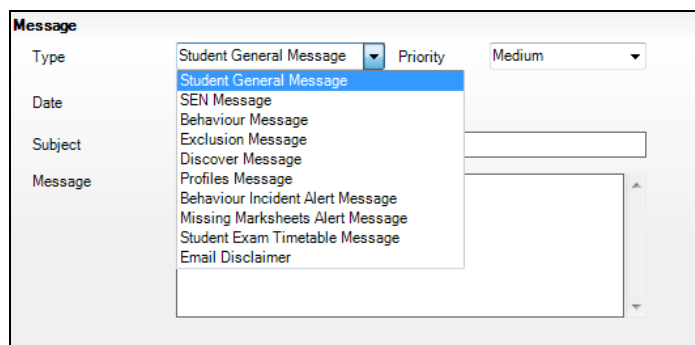
2. Enter or select any necessary search criteria then click the **Search** button.

*NOTE: To filter the list to display only those who are teaching the selected pupil/student today, select **Class Teacher** from the **Role** drop-down list.*

3. To select a single person, highlight their name and click the **OK** button. To select multiple people, you can:
 - click the first person's name and click the **Add** button. Repeat this process for each person you wish to add, then click the **OK** button.
 - select a block of people by clicking the first name in a block, holding down the **Shift** key then clicking the last name in the block, then click the **OK** button.
 - hold down the **Ctrl** key and click each person's name, then click the **OK** button.

The selected name(s) are displayed in the **Recipient Detail** list on the **Send Message** dialog.

4. The message **Type** defaults to **Student General Message**, but can be changed by selecting from the drop-down list of the **Message** panel. This is displayed in the **Read Message** dialog when opened by the recipient.



The screenshot shows a 'Message' form with the following fields and values:

- Type:** Student General Message (selected from a dropdown menu that also lists: SEN Message, Behaviour Message, Exclusion Message, Discover Message, Profiles Message, Behaviour Incident Alert Message, Missing Marksheets Alert Message, Student Exam Timetable Message, and Email Disclaimer).
- Priority:** Medium (selected from a dropdown menu).
- Date:** (empty field)
- Subject:** (empty field)
- Message:** (empty text area)

5. The **Priority** field defaults to **Medium** but can be changed to **Low** or **High**, if required, by selecting a value from the drop-down list.
6. The **Date** defaults to the current date and time and cannot be altered.
7. The **Subject** of the message defaults to: <Pupil/student Name> | <Gender> | <Year Group> | <Class/Reg Group>. This can be edited if required.
8. Enter the main **Message** text.
9. Click the **Send** button to send the message to the selected recipients. The recipients will see this message in the **My Messages** panel of their **Home Page** the next time they log into SIMS, or the next time SIMS refreshes their **My Messages** panel.

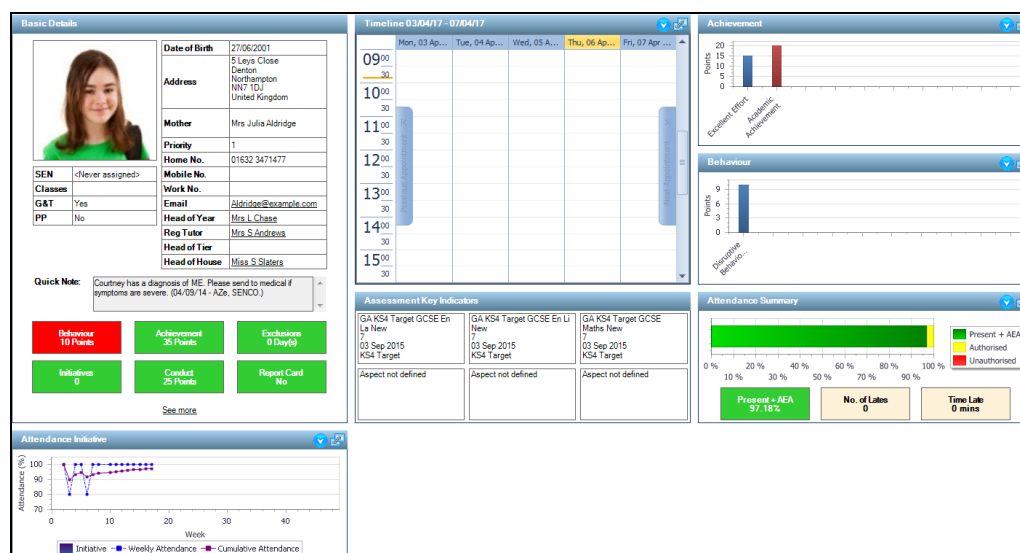


More Information:

Setting Panel Refresh Rates on page 71

Accessing the Student Teacher View

Clicking the **Pupil** (or **Student**) **Teacher View** button displays the **Pupil** (or **Student**) **Teacher View** for the selected pupil/student. This view has been designed to enable class teachers to quickly view a summary of information relating to any pupil/students in their registration group or class.



Viewing Pupil/Student History

This option, accessed via the **History** link, displays the pupil/student page with an **Effective Date** field enabling you to specify the date on which you wish the viewed data to be based. If, for example, you want to see a child's record for the last academic year, simply change the date accordingly. This is particularly useful for viewing previous year groups, registration groups, houses, etc. You can also access this option via **Focus | Pupil** (or **Student**) **| Education History** and selecting the required pupil/student.

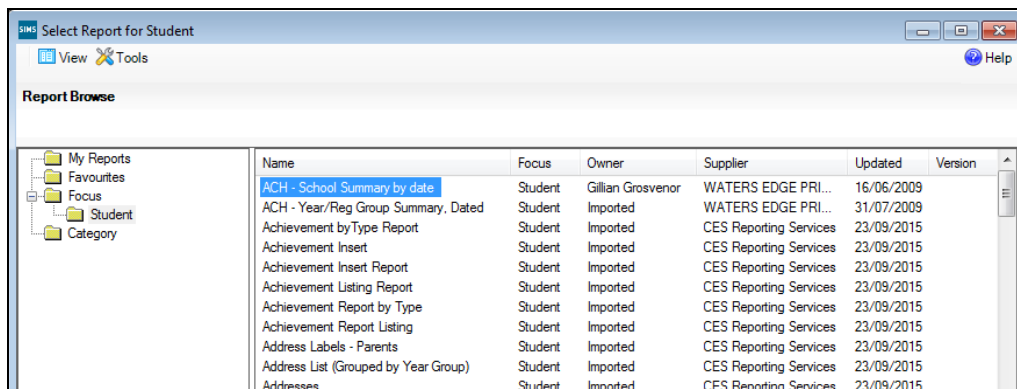


More Information:

Editing Historical Pupil/Student Information on page 255

Running Reports

Clicking the **Reports** hyperlink displays the **Report** browser, enabling you to select the report you wish to produce.



Navigate to and highlight the required report, then click the **OK** button to run it.



Additional Resources:

Designing and Running Reports handbook

Viewing SEN Information

Clicking the **SEN** option displays the **SEN Student** details page containing any SEN information (if applicable).

Student SEN details: Tamwar Abdullah

Save Undo Print Links Help Unpin Close

1 Overview 2 Linked Adults / Agencies 3 Basic SEN Details 4 Reviews 5 Events 6 Statements 7 EHCP 8 Provisions 9 IEPs 10 Gifted / Talented 11 Linked SEN Documents

1 Overview

Date	Type	Summary
22/09/2015	Review	Type: Termly; Status: Planned
05/06/2015	Review	Type: Annual; Status: Meeting Completed
05/02/2015	SEN Status	Changed to: K - SEN Support
05/02/2015	Review	Type: Termly; Status: Meeting Completed
12/01/2015	Event	Type: Medical
15/10/2014	Review	Type: Termly; Status: Meeting Completed
08/09/2014	Provision	Type: Time in SEN Unit
09/06/2014	Review	Type: Annual; Status: Meeting Completed
12/03/2014	Event	Type: Medical

2 Linked Adults / Agencies

Contacts

- Mrs Aneeta Abdullah, Mother
- Mr Usaf Abdullah, Father

Medical

Pastoral

- Mrs Jennifer Boswell, Registration Tutor

Academic

Others

Agent

Agency

3 Basic SEN Details

Status: K - SEN Support Start Date: 05/02/2015 Status History

Statement Pending?

Current Needs

Rank	Start Date	Need Type	Description
1	05/02/2015	Speech, Language or Communication Need	As English is Tamwar's...

Links

- Linked Documents
- Quick letter
- Data Collection S...
- Send Message
- Student Teacher ...
- Pupil Details
- History
- Reports
- Exclusions
- Behaviour Manag...
- Timetable
- Classes
- Attendance
- Dinner Money Fin...
- Assessment
- Communication Log
- Pupil Curriculum

Help



Additional Resources:

Special Educational Needs handbook

Viewing Exclusions Information

The **Exclusions** option displays the **Exclusions Details** page listing any exclusions that may have been applied.

Exclusions							New
Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason	Open
Academic Year 2011/2012	Summer Term	03/07/2012	20/07/2012	14	Fixed Term	Physical assault against a pupil	Delete
Total in Academic Year 2011/2012				0 day(s)			

Information can be added or edited if you have appropriate Permissions.



More Information:

Recording an Exclusion on page 435

Viewing Behaviour Information

The **Behaviour Management** option displays the **Behaviour Management** page showing any achievements, behaviour incidents, detentions and report cards.

Behaviour Management : Tamwar Abdullah

Save Undo Print

1 Academic Year 2 Achievement 3 Behaviour 4 Detention 5 Report Card 6 Reviews 7 Interventions

1 Academic Year

Academic Year Academic Year 2015/2016

Achievements Points 5 Behaviour Points 3 Net Points 2

No. of Detentions Recorded 1 No. of Report Cards 0 No. of Interventions 0

2 Achievement

Date	Type	Points	Comments	Award	Award Date
18/11/2015	Excellent Effort	1	Excellent work in liter...	Certificate	18/11/2015
23/10/2015	Choir Participation	1	Beautiful singing in t...	Headteacher Co...	23/10/2015
12/10/2015	Academic Achieve...	1	Lovely poems written...	Certificate	12/10/2015

New Open Delete

3 Behaviour

Date	Type	Role	Points	Comments	Action	Action Date
03/11/2015	Homework		1	Spellings had cl...		
19/10/2015	Homework		1	Homework was ...	Detention	19/10/2015
16/09/2015	Homework		1	Spellings had cl...	Discussed with ...	16/09/2015

New Open Delete

4 Detention

Date	Location	Reason	Attended	Reason Not Attended
19/10/2015	Headteacher's ...	Homework	Attended	

Open



More Information:

Recording Behaviour Incidents on page 349

Viewing Timetable Information

The **Timetable** option is available to Secondary schools using Nova-T and displays the timetable for the selected pupil/student.

Timetable for: Graham Abbess

New Open Save Undo Print Refresh Preview

Effective Date
Effective Date: 01/10/2015 Refresh

Timetable

☒ Days
☒ Timetable Cycle
☒ Show Subject
☒ Highlight current cell
☐ Highlight distribution
☐ Periods
☐ Current Week
☐ Show Class Code

Class:
Teacher:

Mon	Tue	Wed	Thu	Fri
Mon:1 Mathematics FB M3	Tue:1 Technology PM T6	Wed:1 Mathematics FB M3	Thu:1 German MK L3	Fri:1 Mathematics FB M3
Mon:2 Art KB A3	Tue:2 Technology PM T6	Wed:2 English JA E5	Thu:2 French AZ L1	Fri:2 Geography AP H5
Mon:3 History KJ H6	Tue:3 English JA E5	Wed:3 Science JXE S5	Thu:3 Physical Ed BK GYM	Fri:3 English JA E5
Mon:4 English JA E5	Tue:4 Physical Ed BK GYM	Wed:4 Science JXE S5	Thu:4 Mathematics FB M3	Fri:4 Art KB A3
Mon:5 Science JXE S5	Tue:5 French AZ L1	Wed:5 Technology PM T6	Thu:5 PSE SA S9	Fri:5 Religious Ed HG H7

Changing the **Effective Date** allows a previous or future (if available) timetable to be viewed.

A number of different options are available to change the way that the information is displayed: Day/Period, Timetable Cycle/Current Week, Show Subject/Show Class Code and Highlight Current Cell/Highlight Distribution. Select the applicable check boxes/radio buttons as required.

Viewing Registration Group/Class Information

Selecting the **Classes** option displays the **Classes for Students** page, showing the classes that the selected pupil/student attends, together with the supervisor for each class.

Classes for Student: Graham Abbess

New Open Save Undo Print Refresh

Links Help

1

Effective Date
Effective Date: 01/10/2015 Refresh

1
Classes: 12 Open

Code	Description	Supervisor	Number of Periods
8A/Gg	Geography	Mr A Pinkney	1
8A/Hi	History	Mr K Jacobs	1
8A/Ps	PSE	Mrs S Andrews	1
8A/Re	Religious Ed	Miss H Green	1
8A/Sc	Science	Ms J Estaphan	3
8x/Ar1	Art	Miss K Burrows	2

Double-clicking any class opens the **Class** page listing all the pupil/students within that class.

Viewing Attendance Information

Selecting the **Attendance** option displays the **Attendance** page for the selected pupil/student.

Student Marks: Grenetta Abbey - 11F

Print

Links Help

Views
End Date: 30/09/2015 Refresh

Sessions: ☒ Week View ☐ Month View

Sessions and Lessons: ☐ Day View ☐ Week View

Attendance marks (Attendance Year 2015/2016)

Week Beginning	Mon		Tue		Wed		Thu		Fri	
	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM
01/09/2015			#	#	#	#	/	\	E	E
07/09/2015	E	E	E	E	E	E	E	E	/	\
14/09/2015	/	\	/	\	/	\	/	\	/	\
21/09/2015	/	\	/	\	/	\	/	\	/	\
28/09/2015	/	\	/	\	/	\	/	\	/	\
05/10/2015	/	\	/	\	/	\	/	\	/	\
12/10/2015	/	\	/	\	/	\	/	\	/	\
19/10/2015	/	\	/	\	/	\	/	\	/	\
26/10/2015	#	#	#	#	#	#	#	#	#	#
02/11/2015	-	-	-	-	-	-	-	-	-	-
09/11/2015	-	-	-	-	-	-	-	-	-	-
16/11/2015	-	-	-	-	-	-	-	-	-	-
23/11/2015	-	-	-	-	-	-	-	-	-	-
30/11/2015	-	-	-	-	-	-	-	-	-	-
07/12/2015	-	-	-	-	-	-	-	-	-	-
14/12/2015	-	-	-	-	-	-	-	-	-	-
21/12/2015	#	#	#	#	#	#	#	#	#	#
28/12/2015	#	#	#	#	#	#	#	#	#	#
04/01/2016	-	-	-	-	-	-	-	-	-	-
11/01/2016	-	-	-	-	-	-	-	-	-	-
18/01/2016	-	-	-	-	-	-	-	-	-	-
25/01/2016	-	-	-	-	-	-	-	-	-	-

Analysis of session marks 01/09/2015 - 30/09/2015

Description	Sessions	%
Present	30	75.0
Authorised Absence	10	25.0
Unauthorised Absence	0	0.0
Possible Attendances	40	
Including		
Approved Educational Activity	0	0.0
Late before reg closed	0	0.0

Session code totals 01/09/2015 - 30/09/2015

Code	Description	Sessions	%
/	Present (AM)	15	37.5
\	Present (PM)	15	37.5
E	Excluded	10	25.0

The page displays the attendance marks (if the SIMS Attendance module is in use) for the current academic year.

Viewing Assessment Information

If Assessment Manager is in use, selecting the **Assessment** option displays the **Student Assessment Results Detail** page.

Student Assessment Results Detail: Chris Aaron, SDT

Print Export Links Help

1 Results

1 Results

Filters

☒ Date Range From 01/09/2015 To 17/05/2016 Display All ☐ Refresh

☐ Cycle Year to Date (01-09-2015 to 17-05-2016)

Aspect Name	Result Date	Resultset	Type	Result
*English Attainment Level	02/09/2015	Year 5 Autumn Term	Grade	3A
*English Effort	02/09/2015	Year 5 Autumn Term	Grade	A
*Maths Attainment Level	02/09/2015	Year 5 Autumn Term	Grade	3A
*Maths Effort	02/09/2015	Year 5 Autumn Term	Grade	C
*Reading Attainment Level	02/09/2015	Year 5 Autumn Term	Grade	3A
*Science Attainment Level	02/09/2015	Year 5 Autumn Term	Grade	3A

Select the required date range from the **Filters** section and click the **Refresh** button. This will display all assessment results within the selected timeframe.

Click the **Export** button to export the data to Microsoft Excel.

Viewing Curriculum Information

If Nova-T and Academic Management are in use, selecting the **Student Curriculum** option displays the **Select Effective Date Range** dialog.

SIMS Select Effective Date Range

Academic Year 2015/2016

☒ Named Date Range

Name	Date Range
Academic Year 2015/2016	01/09/2015 - 31/08/2016
<Working Academic Year>	01/09/2015 - 31/08/2016
<Autumn Term+Christmas Holiday>	01/09/2015 - 03/01/2016
<Spring Term+Easter Holiday>	04/01/2016 - 10/04/2016
<Summer Term+Summer Holiday>	11/04/2016 - 31/08/2016

☐ Custom Date Range From 01/10/2015 To 31/08/2016

☒ Restrict date range from today to end

☐ Don't ask me again (this session or until manually changed)

OK Cancel

05| Using the Pupil/Student Links Panel

Select the required date range or create a **Custom Date Range** by selecting the adjacent radio button and entering the custom dates. Click the **OK** button to display the **Student Curriculum Summary** page.

Student Curriculum Summary: Graham Abbess

Save Undo Redo Clone Links Help

1 Schemes 2 Timetable

1 Schemes

Effective Date Range: 20/10/2015 - 31/08/2016 Academic Year: Academic Year 2015/2016

Cursor Day: <None> Selected Scheme: Base bands in Year 8

Cursor Date: <None> Selected Band: <None>

Add Scheme Add Activity Details Scheme Zoom Singletons Relax Action... View Summary

Scheme Name	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Base bands in Year 8	8x											
8xy PSE	8A/Ps											
8x Reg Groups	8A											
8x English	8x/En1											
8x Exp Arts	8x/Ar1											
8x Maths	8x/Ma1											
8x Modern Lang	8x/Fr2											

A **Timetable** panel is also available, listing the timetable for the selected student together with any clashes.

Student Curriculum Summary: Graham Abbess

Save Undo Redo Clone

1 Schemes 2 Timetable

2 Timetable

Invert Timetable Start date: 01/09/2015 Display date: 20/10/2015 End date: 31/08/2016

Add Activity

Day	Mon	Tue	Wed	Thu	Fri
Mon	Mon:1 8x/Ma1 Miss F Burton M3	Mon:2 8x/Ar1 Miss K Burrows A3	Mon:3 8A/Hi Mr K Jacobs H6	Mon:4 8x/En1 Mr J Atkinson E5	Mon:5 8A/Sc Ms J Estaphan S5
Tue	Tue:1 8x/Te2 Mr P Mughal T6	Tue:2 8x/Te2 Mr P Mughal T6	Tue:3 8x/En1 Mr J Atkinson E5	Tue:4 8x/Pe1 Mr B Kinross GYM	Tue:5 8x/Fr2 Mrs A Zelinskova L1
Wed	Wed:1 8x/Ma1 Miss F Burton M3	Wed:2 8x/En1 Mr J Atkinson E5	Wed:3 8A/Sc Ms J Estaphan S5	Wed:4 8A/Sc Ms J Estaphan S5	Wed:5 8x/Te2 Mr P Mughal T6
Thu	Thu:1 8x/Ga2 Mr M Konchalski L3	Thu:2 8x/Fr2 Mrs A Zelinskova L1	Thu:3 8x/Pe1 Mr B Kinross GYM	Thu:4 8x/Ma1 Miss F Burton M3	Thu:5 8A/Ps Mrs S Andrews S9
Fri	Fri:1 8x/Ma1 Miss F Burton M3	Fri:2 8A/Gg Mr A Pinkney H5	Fri:3 8x/En1 Mr J Atkinson E5	Fri:4 8x/Ar1 Miss K Burrows A3	Fri:5 8A/Re Miss H Green H7

Clash Status -

Descr...	Description	Assigned

Effective Date Range: 20/10/2015 - 31/08/2016

Details



Additional Resources:

Academic Management in SIMS handbook

Viewing Courses

To view the courses for which the selected pupil/student is a member, click the **Courses** hyperlink in the **Links** section.

Student Courses Current Course Memberships

- Dolby Peter
 - Ar/KStg3, Art (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: AR Art, Craft or Design
 - En/KStg3, English (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: EN English Literacy or Reading
 - Fr/KStg3, French (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: FL Foreign Language
 - Ge/KStg3, German (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: FL Foreign Language
 - Gg/KStg3, Geography (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: HU Humanities
 - Hi/KStg3, History (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: HU Humanities
 - Ma/KStg3, Mathematics (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: MA Mathematics or Numeracy
 - Mu/KStg3, Music (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: MD Music Singing or Drama
 - Pe/KStg3, Physical Ed (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: PE PE or Games
 - Ps/KStg3, PSE (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: PL PSE or Leisure Education
 - Re/KStg3, Religious Ed (KStg3), 03/09/2015, 22/07/2016
 - School Census Activity: RE Religious Education

The **Current Academic Year** courses are displayed by default, but this can be amended to a different time period by selecting a different option from the drop-down list.

The tree structure opens in expanded view, and displays all courses for which the selected pupil/student is a member. The first node displays the selected pupil/student's name. The second node displays the short name of the course, the course description and its start and end date. The third node displays all of the classifications for the course, the codeset description, its code and code description.

The information on the **Student Courses** page can be printed by clicking the **Report** button, which displays a report in your default Internet browser. You can then right-click and select **Print** from the pop-up menu.

Viewing Examination Results in SIMS

Once examination results have been imported, this information can be viewed in Examinations Organiser and SIMS, together with any outstanding examination entries and forecasts and coursework marks.

Click the **Examinations** hyperlink in the **Links** panel on the right-hand side of the page to display the **Student Examination Results Detail** page.

1 Results, Endorsements and Equivalents											
Date	Level	Board	Code	Title	Status	Result	Points	Endrs	Equiv	Ext	Fcst
2015-02	GCE/ASB	WJEC	212101	Drama and Thea AS Cash-in	Cert	D	90.00				
2015-02	GCE/ASB	WJEC	217101	English Litera AS Cash-in	Cert	D	90.00				
2015-02	GCE/ASB	WJEC	220101	Geography AS Cash-in	Cert	D	90.00				
2015-02	GCE/ASB	WJEC	260101	Applied Busine AS Cash-in (Single)	Cert	D	90.00				
2014-06	CNAT/...	OCR	J804	Business	Cert	M2	0.00				M2
2014-06	GCSE/FC	AQA	4365F	Mathematics (Linear) Tier F	Cert	D	34.00				D
2014-06	GCSE/FC	AQA	8705F...	English Lang Tier F (Written)	Cert	C	40.00				C
2014-06	GCSE/FC	AQA	8710F...	English Lit. Tier F (Written)	Cert	C	40.00				C
2014-06	GCSE/FC	OCR	J241	Science A	Cert	C	40.00				B
2014-06	GCSE/FC	OCR	J303	Design & Tech: Graphics	Cert	D	34.00				D
2014-06	GCSE/FC	OCR	J382	Geography A	Cert	D	34.00				D
2014-06	GCSE/FC	OCR	J730	French	Cert	D	34.00				D

2 Entries and Forecasts							
Season	Level	Board	Code	Title	Status	Mode	Fcst

3 Coursework Marks							
Season	Board	Code	Title	Element	Level	Result	Status

Any examination **Results, Endorsements and Equivalents** are displayed, together with details of any outstanding **Entries and Forecasts**, as well as any **Coursework Marks**.

Click the **Export** button to export the data to Microsoft Excel.

Viewing Tier 4 Information

Applicable to Independent schools only

Click the **Tier 4 Details** link to view a pupil/student's Tier 4 information. **Immigration History** (including Visa and Confirmation of Acceptance for Studies (CAS) details) and **Home Office Reporting** details are displayed and maintained here.

1 Basic Details					
Name	Rosanna Amoso		Region	EEA	
Nationality	Italy		Place of Birth	Rome	
Country of Birth	Italy		Passport Seen	☒	Passport/ID Scanned ☐
Notes					

2 Immigration History					
Visa Type	Issue Date	Expiry Date	Visa Status	CAS Assignment	CAS Reference
Tier 4 child	01/02/2017		Granted		

 New
 Delete

Selected Visa Details			
Visa Type	Tier 4 child	Police Registration Required	☐
Visa Status	Granted	Police Registration Date	
Visa Issue Date	01/02/2017	Entry Date	



More Information:

Recording Tier 4 Application Information on page 274

Recording Tier 4 Information on page 220

Recording Leavers

If a pupil/student leaves your school for any reason, you can mark them as a leaver which removes them from your school, but enables historical records to be kept. During the Summer term, for example, you need to mark most or all pupil/students in your top year as leavers so that they are no longer on-roll at the start of the new academic year. The date of leaving and leaving destination, together with the reason for leaving can be recorded.

IMPORTANT NOTES: To ensure that historical data is accurately maintained, it is essential that you do not record leavers by removing their date of admission.

If a pupil/student who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove the date of leaving (please see Re-admitting Pupil/Students on page 297).

To ensure that information required for statutory returns (e.g. the School Census) is accurate and up to date, check that the leavers has been given an SEN Status other than **Not Assigned** and that an **Ethnicity** has been recorded before making the pupil/student a leaver.

1. Select **Routines | Pupil (or Student) | Leavers** to display the **Find Student(s)** browser.

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expectation
Abbey, Grenetta	13	G	003979	01/09/2011				
Ackton, William	13	K	003923	01/09/2011				
Ahmed, Ackmar	13	L	003981	01/09/2011				
Amiel, Tanzeel	13	N	003924	01/09/2011				

2. Search for the required **Year** or **Reg Group** (or **Class**) by selecting from the appropriate drop-down lists and then click the **Search** button.

To select all the pupil/students displayed in the browser, click the **Select** button down arrow and select **All** from the drop-down menu.

To select a group of pupil/students, highlight them using any of the following methods:

- Hold down the **Ctrl** key and single-click each required pupil/student.
- To highlight sequentially listed children, single-click the first pupil in the list, hold down the **Shift** key then click the last required pupil in the list.

- Once the required pupil/students have been highlighted, click the **Select** button. The selected pupil/students are then transferred to the **Students** panel.

The screenshot shows two panels. The top panel, '1 Leaving Information', contains several input fields: 'Date of Leaving' (08/07/2017), 'Reason for leaving' (Normal leaving age - Employme), 'Destination after Leaving' (Work), 'Destination Institution' (empty), 'Destination Expected Start Date' (09/07/2017), and 'Grounds for Removal' (L - Left School). There are also buttons for 'Assign to All' and 'Assign to Selected'. The bottom panel, '2 Students', displays a table of student records with columns: Name, Year Group, Reg. Group, Adm. No., Date of Admission, Date of Leaving, Reason for Leaving, Destination, Institution, and an 'Exp' column. To the right of the table are 'Remove' and 'Clear' buttons.

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	Exp
Abbey, Grenetta	13	G	003979	01/09/2011					
Ackton, William	13	K	003923	01/09/2011					
Ahmed, Ackmar	13	L	003981	01/09/2011					
Amiel, Tanzeel	13	N	003924	01/09/2011					
Arkwright, Deborah	13	Q	003983	01/09/2011					
Bartlet, Jeremy	13	Q	003984	01/09/2011					
Boman, Chloe	13	M	003927	01/09/2011					
Buckley, Helena	13	H	003928	01/09/2011					
Burison, Angus	13	G	003929	01/09/2011					
Candy, Mandy	13	J	003932	01/09/2011					
Carr, Emilia	13	M	003988	01/09/2011					
Cassidy, Ruth	13	N	003989	01/09/2011					

- Enter the **Date of Leaving** or click the **Calendar** button and select the required date.



Calendar button

This date of leaving should be the date that the pupil/student is actually leaving the school if they are not for transferring from Junior/Primary to Secondary phase. Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not have any gaps between dates and may suggest a date of leaving (the old school) of 4th September and the date of admission (into the new school) of 5th September. If you are in any doubt, please contact your Local Authority for advice.

IMPORTANT NOTE: It is recommended that pupil/students leaving at the end of Year 11 who may return to Year 12, are not given a date of leaving until it has been confirmed that they will be leaving the school at the end of the Summer term as this may cause issues with Attendance information.

- Select the **Reason for Leaving** from the drop-down list, such as **Normal leaving age - Employment**.
- Enter the **Destination after Leaving** if required. Alternatively, you can apply the **Reason for Leaving** to one set of pupil/students (as described in the previous step), then select the **Destination after Leaving** for a different, or subset of pupil/students.
- Enter the **Destination Expected Start Date** or select the required date from the Calendar.
- Select the **Grounds for Removal** from the drop-down list.

9. Secondary schools in England can select a **Learning Aim Withdrawal Reason** from the drop-down list. Secondary schools in Wales can select an **LA Withdrawal Reason** (Learning Activity). When recording a **Learning Aim Withdrawal Reason** for Post 16 students, this information is used by Course Manager.

1 Leaving Information

Date of Leaving: 08/07/2017 Reason for leaving: Normal leaving age - Employee Assign to All

Destination after Leaving: Work Assign to Selected

Destination Institution:

Destination Expected Start Date: 09/07/2017 Grounds for Removal: L - Left School

Learning Aim Withdrawal Reason: Other provider (gov)

2 Students

Name	Year Gr	Reason for Leaving	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	Ex
Abbey, Grenetta	13	Not Known	1/09/2011	1/09/2011				Remove
Ackton, William	13	Not Known	1/09/2011	1/09/2011				Clear
Ahmed, Ackmar	13	Not Known	1/09/2011	1/09/2011				

10. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys (as described in step 2) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
11. If an error has been made, highlight the particular pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
12. To remove a pupil/student from the list, highlight their name and then click the **Remove** button.
13. To clear the contents of the fields in the **Leaving Information** panel, highlight the required pupil/student(s) then click the **Clear** button. Re-enter the information as required.
14. Click the **Save** button to save the changes. The chosen pupil/student(s) are recorded with a date of leaving on the date specified.

Selecting a Destination Institution

1. To narrow your search, enter all or part of the required institution name in the **Name** field and click the **Search** button. Leaving the **Name** field blank will list all institutions.
2. Highlight the relevant institution and click the **OK** button to return to the **School History** panel.
3. Select the **Destination Expected Start Date** by clicking the **Calendar** button and selecting the required date.

06 | Maintaining Pupil/Student Information

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Introduction

There are several ways in which a new pupil/student can be added to SIMS:

- Manual entry via keyboard.
- Importing via CTF (although some details will usually have been entered into SIMS before the CTF is imported).
- Importing via ADT and/or ATF (Admissions Code of Practice for England).
- Via the admissions process (adding as a pre-admission child then offering, accepting and admitting).

This chapter describes how to manually enter a pupil/student into SIMS or edit existing details.

NOTE: The processes available to you, together with the data that can be viewed/edited depend on your permissions and are outlined in the applicable section.

Searching for an Existing Pupil/Student

Any pupil/students already entered into SIMS can be found using the **Find Student** browser.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser.

Name	Year Group	YTI	Reg. Group	House	Gender	Admission Number
Abbess, Graham	8	8	8A	Boyle	Male	004504
Abbey, Grenetta	11	11	11F	Hooke	Female	003979
Abbey, Jimmy	13	13	G	Curie	Male	003599
Abbey, Sean	8	8	8B	Boyle	Male	004505
Abbot, Andrew	10	10	10E	Fleming	Male	004163
Abbot, Ben	11	11	11A	Newton	Male	004161
Abbot, Susan	12	12	I	Hooke	Female	003600

2. Enter either all or part of the pupil/student **Surname** and/or **Forename**, or enter their **Admission Number**.
3. Select applicable values from the various drop-down lists to further restrict the list of pupil/students returned.

By default, pupil/students with the status of **Current** are listed, but it is possible to select **Leavers**, or **Guest Pupil/Students** from the **Status** drop-down list. Leavers are pupil/students who have been given a date of leaving that falls on or before the current date and after the last date of arrival.

If you prefer to search for **Lists** of pupil/students or would like to view pupil/students who have a **Photograph** attached to their details, select either of these options from the **View** drop-down list. The default search option is set to display **Details**.

4. Click the **Search** button to list all pupil/students who match the search criteria specified.

Recording a New Pupil/Student

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Basic Details** panel.

Basic Details

Surname: Forename:

Gender: Date of Birth:

3. Enter any combination of the **Surname** (as a minimum), **Forename** and **Date of Birth** and/or select the **Gender** from the drop-down list and then click the **Continue** button. If no existing pupil/students match, the remainder of the **Pupil (or Student) Details** page is displayed (populated with the details just entered).

NOTE: It is important to ensure that surnames and forenames are spelt correctly at this point to avoid duplicate records being corrected. If you are unsure, enter partial surnames/forenames as required.

To check that the pupil/student does not already exist, any people closely matching the entered details are displayed in the **Matched People** panel.

Matched People

The following people known to the SIMS database have similar details.
To add a new Student with the details entered above, select New.
To add an existing person or edit a known Student, select Open.

Full name	Gender	Roles	Address
Smith, Callum	Male	Student, Candidate, Applic...	15 Birch Grove Elm Wisbe.
Smith, Dan	Male	Student, Candidate	Ye Olde Plough Kimbolton
Smith, Mr Daniel	Male	Contact	2 Castle Terrace Pembroke
Smith, Mr Dave	Male	Contact	Priestgate House Priestgat.
Smith, David	Male	Student, Candidate, Applic...	18 Vine Street Stamford PE
Smith, Mr David	Male	Contact	6 Wellington Place Bletchl.
Smith, David	Male	Student, Candidate, Applic...	21 Mill Street Bedford MK4
Smith, Mr David	Male	Contact	10 Hadleigh Close Bedford
Smith, Mr Edward	Male	Contact	126 High Street Stony Strat
Smith, Geoff	Male	Applicant	
Smith, Daniel	Male	Student, Applicant	10 Hadleigh Close Bedford

*NOTE: The **Matched People** panel displays a list of all **people** in the system which include staff, contacts, agents, etc. If you think the pupil/student already exists, check that the **Role** is **Student**. The order of the display can be changed by clicking the required column heading.*

- If the required pupil/student does not appear in the list, click the **New** button adjacent to the **Matched People** panel. The **Pupil (or Student) Details** page is displayed populated with the data just entered.
- If the required pupil/student appears in the list, you can edit their details by highlighting their name and clicking the **Open** button.

Once a new record has been created, the **Basic Details** panel is displayed with the information added during the previous step.

Adding /Editing Basic Details

Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

1. Click the **Basic Details** hyperlink to display the **Basic Details** panel.

2. Complete any remaining name fields (**Legal Forename** down to **Preferred Forename**), noting that the **Legal Forename** and **Legal Surname** fields are mandatory.

*NOTE: The **Pupil Former Name** should only be completed if a former name is already known to the school. If the pupil/student has more than one former surname, record the most recently used.*

3. Enter the **Date of Birth** if not already completed (this field is mandatory) or click the **Calendar** button and select the required date. The **Age** is automatically calculated based on the date of birth when the record is saved.



Calendar button

4. Select the **Gender** from the drop-down list.
5. Select the **Birth Certificate Seen** check box if applicable.

Recording a Quick Note

There may be occasions when you wish to add an important note that appears in the **Basic Details** panel. This ensures that any user (that has applicable permissions) accessing the pupil/student record, sees the important note.

1. Click the **Quick Note** hyperlink at the bottom of the **Basic Details** panel.
2. The Quick Note pane is expanded. Add the required text which appears in bold and will remain visible until closed. If you want the note to be closed, click the **Quick Note** hyperlink again.

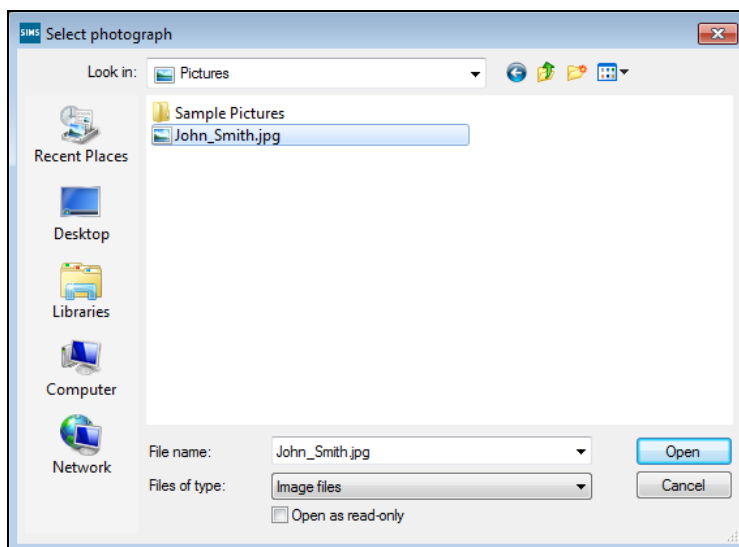
Attaching a Photograph

1. If you have an electronic copy of a pupil/student photo, this can be attached to the record by clicking the **File Browser** button to the right of the **Photograph** panel.



File Browser button

The **Select Photograph** dialog is displayed.



2. Navigate to, and then select the required photograph, then click the **Open** button. The selected photo appears in the **Basic Details** panel.

1 Basic Details

Legal Forename
Middle Name(s)
Legal Surname
Preferred Surname
Preferred Forename
Date of Birth
Current Age
Gender
Birth Certificate Seen
Former UPN
UPN
Quick Note

John

Smith
Smith

☐

Photograph

Recording a Legal Change to a Pupil/Student's Current Name

It is a requirement of the English School Census and Welsh PLASC returns that a history of pupil/students' previous **Legal Names** is maintained. This information is also transferred via the Common Transfer File (CTF).

It is possible to make changes to a pupil/student's or an applicant's name details. The changes may affect their current name details or details that were previously valid.

It may be necessary to make changes for a number of reasons including the correction of inaccurately entered information, legal adoption, change of legal surname, etc. If the name change is because a correction is required, please refer to the next section.

When a pupil/student's **Legal Surname** or **Forename** is changed, it is essential that the date that the change was either requested by the parents or actually became legal, is recorded.

1. In the **Basic Details** panel, review the incorrect name details and then make the necessary changes.

2. Click the **Save** button on the main **Pupil (or Student) Details** page to save the details. The following message is displayed.

If the name change is a correction, click the **No** button. This will complete the name change.

If the **Yes** button is clicked, the **Reason for Change** dialog is displayed.

3. The **Reason** field does not have to be completed but should be selected to maintain a complete history of the name change. The **Date of Change** defaults to today's date but this can be amended by clicking the **Calendar** button and selecting an alternative date.
4. Click the **OK** button to close the dialog and save the changes. The pupil/student's name is now displayed correctly.

Correcting a Pupil/Student's Current Name

If the pupil/student's name was originally entered incorrectly, it is possible to correct the relevant details.

1. In the **Basic Details** panel, review the incorrect name details and then make the necessary corrections.
2. Click the **Save** button on the main **Pupil (or Student) Details** page to save the details.

SIMS displays a message dialog asking '**Is this a name change or a correction?**'

3. Click the **Correction** button to close the message dialog and save the correction.

The pupil/student's name is now displayed correctly.

Correcting/Removing a Pupil/Student's Previous Name

1. In the **Basic Details** panel, click the **History** button to display the **Previous Names** dialog.

Legal Forename	Middle Name(s)	Legal Surname	Reason	Date Of Change
Daniel		Smith	Deed Poll	01/10/2015

- Any existing previous names for the pupil/student are displayed together with the **Reason** and **Date of Change**.
- Highlight the previous name that needs to be corrected and click the **Open** button to display the **Edit Previous Name** dialog. To delete the previous name, highlight the name then click the **Delete** button.

The screenshot shows a dialog box titled "Edit Previous Name for Daniel Smith". It has a "Previous Name Details" section with the following fields:

- Legal Forename: Daniel
- Middle Name(s):
- Legal Surname: Smith
- Reason: Deed Poll
- Date of Change: 01/10/2015

At the bottom of the dialog are "OK" and "Cancel" buttons.

- Correct the relevant details and click the **OK** button to close the dialog and return to the **Previous Names** dialog. The **Date of Change** should be completed to indicate when the pupil/student's previous name ceased to be used by them. The **Reason** for change is not mandatory but should be completed to maintain a full history of the name change.

If a previous name change has already been recorded for the pupil/student on this date, SIMS displays the following warning message: **The Legal name for (Pupil/Student Name) has previously been changed for the selected date. Please re-select the date or change the existing previous name.** The correct details of the pupil/student's previous name are now displayed.

Selecting Values from Lists

*NOTE: Lookup values in drop-down lists which appear in red text (or another colour if the **Unusual Value Text Colour** has been changed from its default setting of red in **Tools | Setups | User Options**) are values which have been set to inactive since they were selected in the pupil/student record.*

The screenshot shows the "Student Details: Grenetta Abbey" form. The "Additional Information" section is expanded, showing the following details:

- Meals:** Free Meal, Home, Sandwiches
- Modes of travel:** Boarder - not applicable, Bus (type not known), Car Share (with child/children)
- Recoupment:** Youth Support Services Agreement (Refused), Route (Wilverton)
- LA Provided Transport:** Unchecked

Adding /Editing Registration Information

IMPORTANT NOTE: The DfE advises that schools in Consortium arrangements may register their pupil/students Single and Guest, rather than Dual Registered – Main and Dual Registered – Subsidiary.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Registration** hyperlink to display the **Registration** panel.

3. Select the **Registration Group/Class, Year Group** (mandatory) and **House** (if applicable) into which the pupil/student will be placed, from the appropriate drop-down lists.
4. The **Enrolment Status** field is read-only and you must navigate to **Routines | Pupil (or Student) | Change Enrolment Status** to edit the status (please see *Changing the Enrolment Status* on page 182).
 - **Single Registration** - a normal, full-time pupil/student who is registered only at your school.
 - **Guest Pupil** - a pupil/student who attends your school for some of their lessons, but predominantly attends their Main school. Guest pupil/students are not registered at your school and do not have an admission number.
 - **Main-Dual Registration** - a pupil/student who is also registered at another school for some of their timetable, but the majority of their time is spent at your school.
 - **Subsidiary-Dual Registration** - a pupil/student who is also registered at another school for the majority of their timetable and only a minority of their time is spent at your school.
 - **FE College** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at an FE College and only a minority of their time is spent at your school.

- **Other Provider** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at another provider and only a minority of their time is spent at your school.
5. If a UPN that is a duplicate of an existing UPN is manually entered into a pupil/student's record, an error message is displayed, indicating which pupil/student, applicant or leaver already has that UPN assigned to them. The error message takes the form: **<UPN number> is already assigned to <name> <registration group>**.

 UPN B820432109001 is already assigned to Abbey, Jimmy [(G)]

6. Select the **Year Taught In** (mandatory) from the drop-down list. The National Curriculum Year Group (Year Taught In) is the year group in which the pupil/student is taught for the majority of the time, regardless of their chronological age. In most cases, this will be the same as the Year Group. However, some children are taught, for example, in the year above or below the expected year (based on their age), perhaps because they are academically advanced or behind. It is very important that the correct **Year Taught In** is specified for School Census purposes.

*NOTE: Special Schools can select **Exempt from National Curriculum** year when selecting the **Year Taught In** (as applicable), providing that this has been defined in the Pastoral Structure via **Focus | School | Pastoral Structure | Current Structure**.*

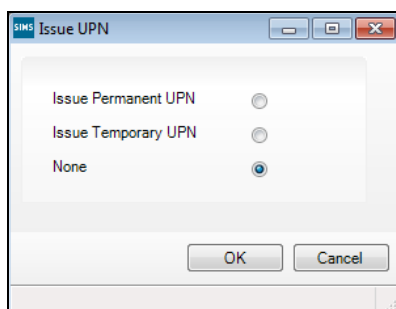
7. Select the **Boarder Status** (if applicable) e.g. **Not a Boarder** or **Boarder – night not specified** from the drop-down list.
8. Enter the **Admission Date** (mandatory) or click the **Calendar** button and select the required date.
9. Enter the **UPN** or **Local UPN**, if known.
- **Permanent UPNs** are issued to new pupil/student 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 a pupil/student only when a school does not know the permanent UPN (e.g. awaiting transfer file/applicant's information).

NOTE: UPN information is required for the School Census.

10. If necessary, issue a new UPN by clicking the **Generate UPN** button adjacent to the **UPN** field to display the **Issue UPN** dialog.



Generate UPN button



- Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
- Click the **OK** button. The UPN is generated when the record is saved.

The introduction of the **Unique Learner Number** (ULN) was in response to a government requirement for students aged 14 to 19 to be allocated a number that they retain for life. This allows people to build a lifelong record of their learning participation and achievements (their learner record), which they can access and may also choose to share. Schools can retrieve the ULN information from School to School (S2S) via CTF, or from the Managing Information Across Partners (MIAP) website (<http://www.miap.gov.uk/>). They can also retrieve ULN information from the LRS portal (<https://www.gov.uk/education/learning-records-service-lrs>). This information will also be available when students transfer between Secondary schools from the inception of CTF version 8.0 onwards.

The **Unique Learner Number** field is used to display this information.

Unique Learner Number	1111176638

11. You can add the ULN to this field at any time by entering the details.
12. Select the **Attendance Mode** from the drop-down list. The completion of this field is usually only required for Nursery age children.
The **UCI** (Unique Candidate Identifier) and **Exam Number** fields are read-only and populated from the information held in Examinations Organiser.
13. A history of a pupil/student's registration details can be maintained by clicking the **History** button.
14. Click the **Save** button.

Deleting a UPN

A UPN can be deleted from a pupil/student's record, if necessary.

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

2 Registration			
Registration Group	G	House	Curie
Year Group	Upper Sixth	Year Taught In	Curriculum Year 13
Enrolment Status	Single Registration	Boarder Status	Not a Boarder
Admission Date	01/09/2009	Admission Number	003599
Former UPN		Attendance Mode	All day
UPN	B820432109001	Local UPN	

3. Select the contents of the **UPN** field in the **Registration** panel and press the **Delete** key.
4. Click the **Save** button.

The **UPN** field is cleared. The deleted UPN moves into the **Former UPN** field.

2 Registration			
Registration Group	G	House	Curie
Year Group	Upper Sixth	Year Taught In	Curriculum Year 13
Enrolment Status	Single Registration	Boarder Status	Not a Boarder
Admission Date	01/09/2009	Admission Number	003599
Former UPN	B820432109001	Attendance Mode	All day
UPN		Local UPN	

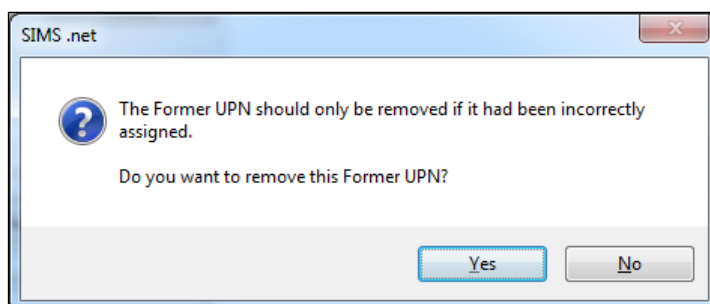
Deleting a Former UPN

A **Former UPN** can be deleted from a pupil/student's record, if necessary. An example of when this would be appropriate is a UPN that was assigned to an applicant who never attended the school.

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

2 Registration			
Registration Group	G	House	Curie
Year Group	Upper Sixth	Year Taught In	Curriculum Year 13
Enrolment Status	Single Registration	Boarder Status	Not a Boarder
Admission Date	01/09/2009	Admission Number	003599
Former UPN	B820432109001	Attendance Mode	All day
UPN		Local UPN	

- Click the **Delete** button adjacent to the **Former UPN** field in the **Registration** panel.



- Click the **Yes** button to confirm the deletion.
The **Former UPN** field is cleared.

2 Registration			
Registration Group	G	House	Curie
Year Group	Upper Sixth	Year Taught In	Curriculum Year 13
Enrolment Status	Single Registration	Boarder Status	Not a Boarder
Admission Date	01/09/2009	Admission Number	003599
Former UPN		Attendance Mode	All day
UPN		Local UPN	

- Click the **Save** button.
The UPN can now be re-used.

Adding /Editing Part-time Details

- If the pupil/student will be attending school on a part time basis, select **AM only** or **PM only** from the **Attendance Mode** drop-down list. This is usually only required for nursery aged children.

NOTE: Part-time attendance is allowable for all ages and is considered to be anything less than 10 sessions per week. It refers to part-time in education, not part-time in one or more establishments.

- You need to specify the period during which this arrangement will apply by clicking the **New** button to display the **Add Part-time Attendance** dialog.

 A screenshot of the "Add Part-time Attendance" dialog box. It has a title bar with "SIMS Add Part-time Attendance". Inside, there are two date pickers: "Start Date" with the value "01/10/2015" and "End Date" with the value "31/08/2016". At the bottom, there are "OK" and "Cancel" buttons.

- The **Start Date** defaults to today's date and the **End Date** defaults to the first day of the next academic year. Edit these dates as required then click the **OK** button.

*NOTE: Appropriate records are created in Attendance (if in use), when the record is saved. It is important to edit this information should a pupil/student no longer be part-time – an **End Date** should be added and the **Attendance Mode** drop-down list should be changed to **All Day**.*

Setting up Early Years Attendance Patterns for Pupils

Applicable to English Primary Schools Only (including Independent Multiphase schools)

Parents are now entitled to receive 15 hours of free nursery provision per week, which can be taken over a minimum of three days. They can choose to take as much or as little of the 15 hour, and use their entitlement at more than one nursery provider, if they wish.

This routine enables your school to set up an early years attendance pattern for any pupil but typically two, three and four year olds. Defining a weekly attendance pattern for a pupil does not have any impact on the recording of attendance. It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and PM, that the provisions defined in the attendance patterns). For more information, please refer to the *Managing Pupil/Student Attendance* handbook.

The periods of nursery care provision that are available to parents, e.g. Provision 1 (Morning Nursery Care), must have previously been defined via **Tools | Setups | Attendance Setup | Early Years Provisions Setup**. For more information, please refer to the *Managing Pupil/Student Attendance* handbook.

1. Click the **New** button adjacent to the **Early Years Attendance Patterns** section to display the **Add/Edit Early Years Attendance Patterns** dialog.

2. By default, the **Start Date** is displayed as today's date. If necessary, edit the date to indicate when the Early Years Attendance Pattern is to start or click the **Calendar** button and select the required date.

Click the **Refresh Week** button to ensure that the correct weekly pattern of days is displayed based on the **Start Date**.

For example:

If the **Start Date** falls in the current academic year for which your school's week pattern is 5 days (Monday to Friday), Monday to Friday is displayed.

However, if the **Start Date** falls in the next academic year for which the week patterns is 6 days (Monday to Saturday), Monday to Saturday is displayed.

3. Enter an **End Date** for the Early Years Attendance Pattern (if known) or click the **Calendar** button and select the required date. This date can be entered later.
4. Select each day's **Provision Type** from the associated drop-down list. Select from **Provision 1**, **Provision 2**, **Provision 3** or **No Provision**.

5. Click the **OK** button to return to the **Registration** panel.

Start date	End date	Mon	Tue	Wed	Thu	Fri	Sat	Sun
01/10/2015		PROV1	PROV2	PROV3	PROV2	PROV1		

6. Click the **Save** button to retain the Early Years Attendance Pattern for that pupil.

7. To edit an Early Years Attendance Pattern:
 - a. Highlight the provision record then click the **Open** button to display the **Add/Edit Early Years Attendance Patterns** dialog. All items are editable.
 - b. Edit the details, as required then click the **OK** button to return to the **Registration** panel.
 - c. Click the **Save** button to retain your changes.
8. To delete an Early Years Attendance Pattern, highlight the provision record then click the **Delete** button. The record is deleted immediately.

Changing the Enrolment Status

IMPORTANT NOTE: The DfE advises that schools in Consortium arrangements may register their pupil/students *Single and Guest*, rather than *Dual Registered – Main and Dual Registered – Subsidiary*. For full details of the advice from the DfE, please refer to the official DfE guidance notes, which are available from the My Account website (<https://myaccount.capita-cs.co.uk>).

There may be occasions when an enrolment status for an applicant or pupil/student needs to be amended. The following enrolment statuses are available:

- **Single Registration** - this status represents a normal, full-time pupil/student who is only registered as on-roll at your school.
- **Guest Pupil** - this status represents a pupil/student who is on-roll at another school, but attends your school for certain lessons. There is no need to register them as on-roll at your school.
- **Main-Dual Registration** - this status indicates that the pupil/student is registered at another school for some of their timetable, but the majority of their time is spent at your school. This status carries legal and financial implications and should only be used after agreement with the other school involved.
- **Subsidiary-Dual Registration** - this status indicates that the pupil/student is registered at another school for the majority of their timetable and only a minority of their time is spent at your school. This status carries legal and financial implications and should only be used after agreement with the other school involved.
- **FE College** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at an FE College and only a minority of their time is spent at your school.
- **Other Provider** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at another provider and only a minority of their time is spent at your school.

All pupil/students who are registered as on-roll, including Dual Registration pupil/students, must have their attendance details recorded.

Maintained schools in England that have Dual Registered pupil/students must use **D - Dual Registered (attending other establishment)** to signify the sessions that these pupil/students attend.

IMPORTANT NOTE: If a pupil/student is on-roll until Year 11 then comes back into Year 12 as a guest, you need to make them a leaver at the end of Year 11, re-admit them into Year 12 and then change the registration status to **Guest**.

NOTE: This routine can be run only for pupil/students in the current academic year.

1. Select **Routines | Pupil (or Student) | Change Enrolment Status** to display the **Find Student** browser.

Name	Year Group	Class	House	Gender	Admission Number	Status
Aaron, Chris	5	5DT		Male	001521	Single Registration
Aaron, Liz	5	5DT		Female	001103	Single Registration
Aaron, Sophie	5	5BB		Female	001104	Single Registration
Abdullah, Tamwar	2	2JB		Male	001275	Single Registration
Abhra, Abjit	1	ELM		Male	001336	Single Registration
Abhra, Alisha	1	PINE		Female	001337	Single Registration

2. Search for the required pupil/student then click the **Open** button to display the **Change Enrolment Status** page.

Change Enrolment Status

Save Undo

1 Basic Details 2 Registration

1 Basic Details

Legal Forename: Tamwar

Middle Name(s):

Legal Surname: Abdullah

Preferred Surname: Abdullah

Preferred Forename: Tamwar

Date of birth: 12/01/2009

Age:

Gender: Male

Birth Certificate Seen: ☐

Photograph:

2 Registration

Enrolment Status: Guest pupil

Student Date of Change: 01/01/2018

Notes:

This date is for information only. It will not impact any other part of the system.

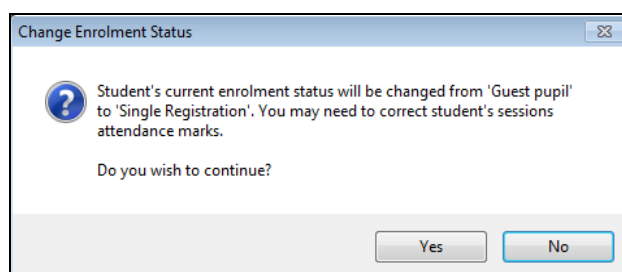
3. Click the **Registration** hyperlink to display the **Registration** panel.

4. Select the required status from the **Enrolment Status** drop-down arrow, such as **Main – Dual Registration**.

Click the adjacent magnifying glass button to view the **Enrolment Status Changes** dialog, if required.

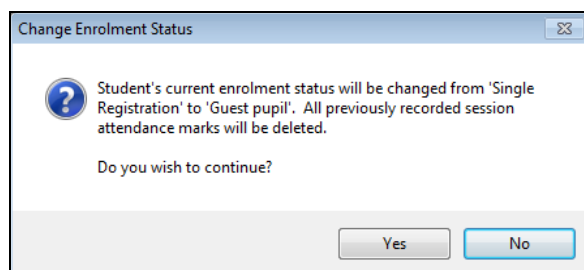
5. The **Student Date of Change** defaults to today's date but can be edited by selecting from the Calendar.
6. Enter any **Notes**.
7. Click the **Save** button to save the changes.

If the pupil/student's enrolment status is changed from **Guest Pupil** (or **Student**) to **Single Registration**, **Main Dual Registration** or **Subsidiary Dual Registration**, a message dialog similar to the following is displayed:



SIMS allocates the pupil/student a new admission number. You may need to go into **Attendance** and check/correct the necessary attendance marks. For example, if the pupil/student was a guest from 1st July and then made Single Registration on 18th July, you will need to enter attendance marks from 1st-18th July.

If the pupil/student's enrolment status is changed from **Registered (Single, Main Dual or Subsidiary Dual)**, to **Guest Pupil** (or **Student**), a message similar to the following is displayed:



SIMS removes the admission number that was previously allocated when the pupil/student was on-roll together with all the attendance marks relating to their current enrolment status.

8. Click the **Save** button to save the changes.

Changing the Date of Admission

IMPORTANT NOTE: Do not re-admit a pupil/student by changing the **Admission Date**. Ensure that you re-admit pupil/students using the correct method (please see Re-admitting Pupil/Students on page 297).

1. Select **Focus | Pupil (or Student) | Student Details** to display the **Find Student** browser.
2. After searching for the required pupil/student, click the **Registration** hyperlink to display their **Registration** panel.
3. Click the **Calendar** button adjacent to the **Admission Date** field and select an alternative date of admission. This date can be in the past, present or the future.
4. Click the **Save** button to save the changes.
5. The following warning message is displayed: You are changing the DOA for this student. If the student is being readmitted please follow the correct procedure for readmission. Would you like to continue?

Click the **Yes** button to continue.

SIMS validates the changes based on the following criteria:

- A date of admission has been entered.
- The date of admission is not prior to the pupil/student's date of birth.
- If the pupil/student has already left the school, that the date of admission is prior to their date of leaving.
- The date of admission does not overlap with a previous period of time that the pupil/student was on-roll or a guest at the school.

If the date of admission (DOA) has been changed to a date that occurs after the previously entered DOA, SIMS displays the following message: The pupil/student's date of admission has changed from <old date> to <new date>. All registration information and attendance marks between these dates will be deleted. Do you wish to continue?

If the date of admission has been changed to a date that occurs before the previously entered DOA, SIMS displays the following message: The pupil/student's date of admission has changed from <old date> to <new date>. You may need to adjust the student's registration history and enter attendance marks. Do you wish to continue?

NOTE: If the new admission date has been changed to a date that occurs before the previously entered DOA, the missing attendance marks need to be entered manually. Only attendance marks for the current academic year can be entered. If the new date of admission is in a previous academic year, it is not possible to enter the required attendance marks.

Saving the Record

Once all the required information has been entered, click the **Save** button on the toolbar. Any missing mandatory information is highlighted in red together with a warning message which is displayed on the Status Bar. This information must be completed before the record can be saved.

The **Admission Number** is automatically generated when the record is saved.

Adding / Editing an Address

When adding addresses, the most efficient method is to search for any existing addresses which can either be opened or copied. In addition to searching your SIMS database, if you have activated the Address Validation Service, it is also possible to search an external database via the Internet by entering a post code and matching it to a corresponding address. This significantly reduces the amount of address data entry required. Please refer to the *Setting Up and Administering SIMS* handbook for more information on setting up the Address Validation Service.

There are two modes for entering an address – **Basic** or **Advanced**.

Basic - a post code must be provided together with a house number or name if available. A search is carried out on both the SIMS database and the Web Address Validation Service. This is the most efficient method.

Advanced - a post code, street or town/city must be supplied. The search is only carried out on existing addresses in the SIMS database. If the Address Validation Service has not been activated, this will be the method used.

IMPORTANT NOTE: When adding an address to an application record (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the address is transferred to the pupil/student's main record on the date they are actually admitted to the school, rather than the Date of Admission of their intake group.



Application icon

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Addresses** hyperlink to display the **Addresses** panel.

Adding an Address Using Basic Mode

1. Enter the **Post Code** and if available, the **House Number / Name**.

2. Click the **Continue** button. A list of addresses matching the entered post code is returned in the **Find Matching Addresses** dialog.

House Name	House No.	Apartment	Street	Town	PostCode
William S...	1	Flat 1	Conduit Road	Bedford	MK40 1AJ
William S...	1	6	Conduit Road	Bedford	MK40 1AJ
William S...	1	10	Conduit Road	Bedford	MK40 1AJ
William S...	1	8	Conduit Road	Bedford	MK40 1AJ
William S...	1	7	Conduit Road	Bedford	MK40 1AJ
William S...	1	11	Conduit Road	Bedford	MK40 1AJ
William S...	1	3	Conduit Road	Bedford	MK40 1AJ
William S...	1	5	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 2	Conduit Road	Bedford	MK40 1AJ
William S...	1	9	Conduit Road	Bedford	MK40 1AJ
William S...	1	Flat 4	Conduit Road	Bedford	MK40 1AJ
Hopton D...	2		East Town		
	16		Hopton Drive		
Newbroo...			Newbrook Street		

- If an exact match is found, highlight the required address then click the **Open** button to select it. The following icons help to identify the type of address:



Identifies an address currently on the web service.



Identifies a local address that has not yet been validated.



Identifies a local address that has been validated.

3 Addresses

New Home Address Details (Validated)

Apartment: 7 House Name: William Sutton Court

House No.: 1

Street: Conduit Road

District: Town / City: Bedford

County: Post Code: MK40 1AJ

Country: United Kingdom Address type: Home

Note:

Start date: 01/10/2015 End date:

Buttons: Delete, Move House, Validate

The address is displayed in the **Addresses** panel and is highlighted as **Validated**.

*NOTES: When recording some addresses (such as pupil/student), it is possible to select an **Address type** which defaults to the type applicable to addresses being added. For example, if the address is for a contact, the type defaults to **Home**. If this is an address for an agency, the type defaults to **Work**.*

*It is also possible to add **Notes** and/or **Start** and **End** dates to some addresses.*

- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
 - If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.
3. Complete any remaining fields as required, ensuring that the type of address, e.g. **Home** is selected from the **Address type** drop-down list.

Adding an Address Using Advanced Mode

1. If the post code is not known, click the **Advanced** button to display additional address fields. A minimum of either **Street** or **Town / City** must be supplied.

3 Addresses

Enter address

Post Code: Country: United Kingdom

House Number/Name:

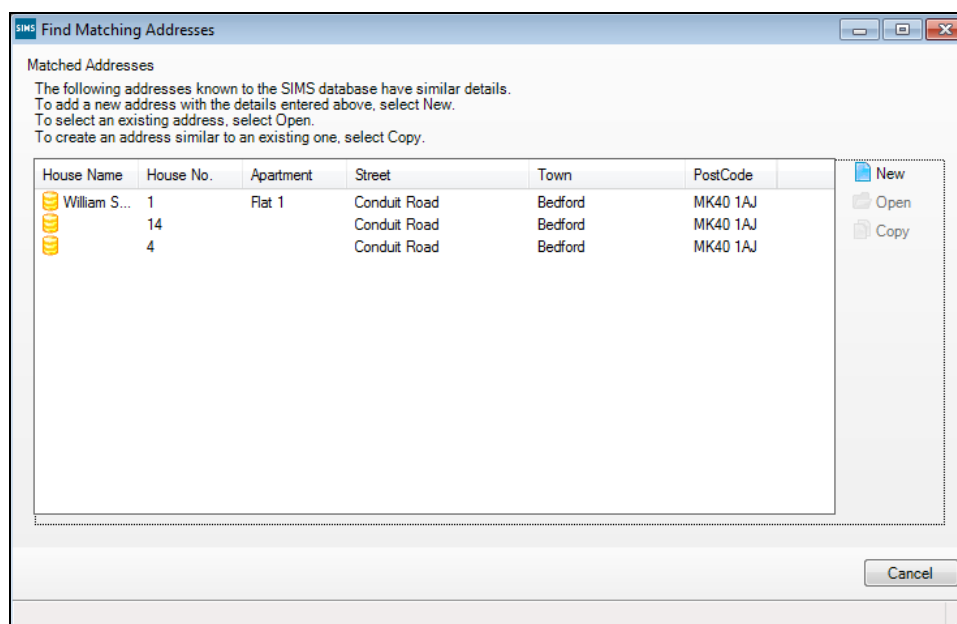
Street: Conduit Road

Town / City:

☐ Search Validation Service ☒ Search Existing Addresses

Buttons: Continue, Basic

2. Click the **Continue** button to search existing addresses in your SIMS database. A list of matching addresses is returned in the **Find Matching Addresses** dialog.



- If an exact match is found, select the required address then click the **Open** button to select it.

3 Addresses

New Home Address Details (Not validated)

Apartment		House Name	
House No.	14		
Street	Conduit Road		
District		Town / City	Bedford
County	Bedfordshire	Post Code	MK40 1AJ
Country	United Kingdom	Address type	Home
Note			
Start date	13/10/2015	End date	

The address is displayed in the **Addresses** panel and is highlighted as **Not validated**.

*NOTES: When recording some addresses (such as pupil/student), it is possible to select an **Address type** which defaults to the type applicable to addresses being added. For example, if the address is for a contact, the type defaults to **Home**. If this is an address for an agency, the type defaults to **Work**.*

*It is also possible to add **Notes** and/or **Start** and **End** dates to some addresses.*

- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
 - If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.
3. Complete any remaining fields as required, ensuring that the type of address, e.g. **Home** is selected from the **Address type** drop-down list.

Recording an Additional Address

Some pupil/students or applicants may have more than one address. This may be because they share their time living between parents who have separated and now live at different addresses, or live in one place during the school term and another place during the school holidays.

The screenshot shows a software interface titled "3 Addresses". It features a "History" button in the top right. The main section is titled "Current Home Address Details (Validated)". On the left, there is a small globe icon and a button labeled "Address". The central area contains the address: "3 Penrith Grove", "Peterborough", "PE4 7FQ", "United Kingdom". To the right of this area are four icons: a red 'X' for "Delete", a blue circular arrow for "Modify Address", a blue house icon for "Move House", and a blue circular arrow with a checkmark for "Validate". Below the address is a "Note" field. Further down are "Start date" (26/04/2012) and "End date" fields, each with a calendar icon. Below these is the "Enter additional address" section, which includes "Post Code", "Country" (a dropdown menu currently showing "United Kingdom"), and "House Number/Name" fields. At the bottom right are "Continue" and "Advanced" buttons. At the bottom left are two checkboxes: "Search Validation Service" and "Search Existing Addresses", both of which are checked.

These additional addresses can be added using exactly the same methods as described in the previous section, but entering applicable information in the **Enter additional address** section.

The screenshot shows a software interface titled "New Home Address Details (Not validated)". It contains several input fields: "Apartment", "House No." (containing "10"), "Street" (containing "Mount View"), "District", "County" (containing "Parkshire"), "Country" (a dropdown menu showing "United Kingdom"), "Town / City" (containing "Greentree"), "Post Code", and "Address type" (a dropdown menu showing "Home"). There is also a "Note" field containing the text "Lives with his mother weekdays, father weekends." and "Start date" (16/10/2015) and "End date" fields, each with a calendar icon. On the right side, there are three icons: a red 'X' for "Delete", a blue house icon for "Move House", and a blue circular arrow with a checkmark for "Validate".

1. In addition to the normal address details, select the **Address type** from the drop-down list, e.g. **Second Home**.
2. Enter any applicable **Notes** that explain the additional address, e.g. Lives with his mother weekdays, father at weekends.

Moving a Pupil/Student's Home Address

If a pupil/student has an existing home address recorded in the system and you receive notification that their family are moving house, you need to record that the address has changed.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Addresses** hyperlink to display the **Addresses** panel.

The screenshot shows the 'Addresses' panel in the SIMS system. It features a 'Current Home Address Details (Validated)' section with a globe icon and an 'Address' button. The address is listed as 'Dalwood Lodge, 1 Ely Road, Milton, Cambridge, CB24 6DD, United Kingdom' with a UPRN of 10003191315. To the right of the address are buttons for 'Delete', 'Modify Address', 'Move House', and 'Validate'. Below the address is a 'Note' field. Further down are 'Start date' (25/10/2012) and 'End date' fields, each with a calendar icon. There is also a section for 'Enter additional address' with fields for 'Post Code', 'House Number/Name', and 'Country' (set to 'United Kingdom'). At the bottom are checkboxes for 'Search Validation Service' and 'Search Existing Addresses', and 'Continue' and 'Advanced' buttons.

3. Click the **Move House** button adjacent to the **Current Home Address Details** panel to display the following warning message.

The screenshot shows a warning dialog box titled 'SIMS'. It contains a question mark icon and the text 'Are you sure you want to move this person to a new address?'. At the bottom are two buttons: 'Yes' and 'No'.

- Click the **Yes** button to display the **Find Matching Addresses** dialog.

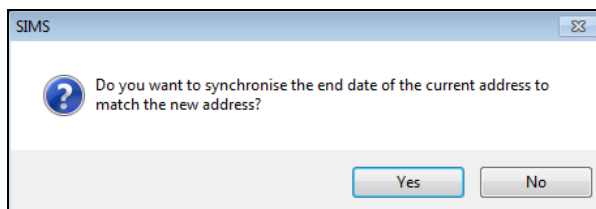
- If known, enter the **Post Code** and the **House Number / Name**. If the post code is not known, complete as much of the address as possible (either **Street** or **Town / City** must be supplied). It is advisable to search by entering minimal data such as the **Post Code** and then click the **Continue** button.

- Any addresses matching the search criteria entered are displayed in the **Matched Addresses** panel.

House Name	House No.	Apartment	Street	Town	PostCode
	1		Feamley Crescent	Bedford	MK42 8NL
	10		Feamley Crescent	Bedford	MK42 8NL
	12		Feamley Crescent	Bedford	MK42 8NL
	14		Feamley Crescent	Bedford	MK42 8NL
	16		Feamley Crescent	Bedford	MK42 8NL
	18		Feamley Crescent	Bedford	MK42 8NL
	2		Feamley Crescent	Bedford	MK42 8NL
	20		Feamley Crescent	Bedford	MK42 8NL
	22		Feamley Crescent	Bedford	MK42 8NL

- If an exact match is found, select the required address then click the **Open** button to select it. The address is displayed in the **Addresses** panel and is highlighted as **Validated**.
- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.

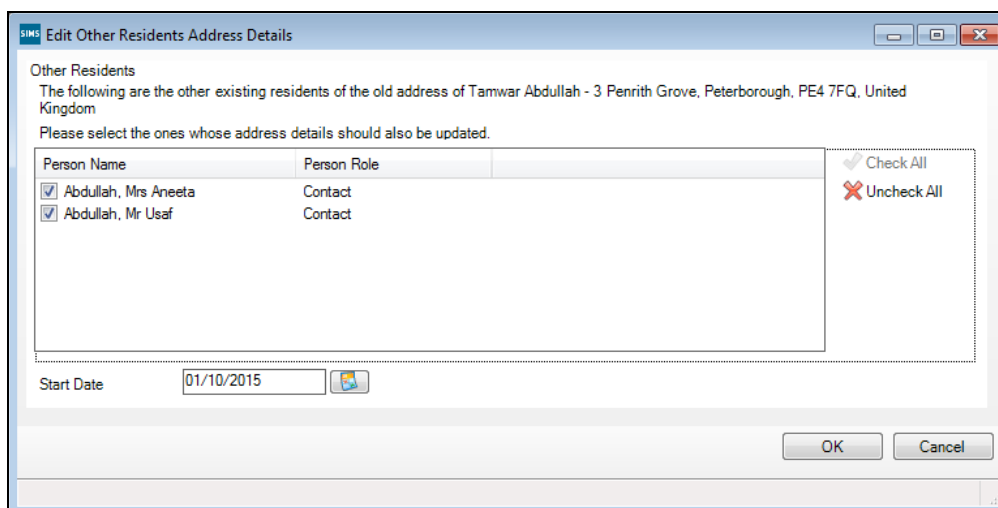
- If the required address does not exist, click the **New** button in the **Find Matching Addresses (Not validated)** panel is displayed and is populated with the address details first entered in the search.
7. Whichever option is chosen (new, open or copy), the following warning message is displayed:



8. Click the **Yes** button. This adds an end date to the current address of the day before the start date of the new address (specified in the next step).

*NOTE: If you click the **No** button, no end date will applied to the current address and the pupil/student is listed as having multiple addresses. You will not be able to save until you manually enter an **End Date** for the current address.*

9. If there are other people entered in SIMS who live at the same current address as the pupil/student, the following **Edit Other Residents Address Details** dialog is displayed, enabling you to decide whether these people should also move to the new address:



All the people listed as residing at the same address are automatically selected as moving to the new address. If anyone is not moving, ensure that the check box adjacent to their name is not selected.

Enter the **Start Date** for the new address, then click the **OK** button.

- The appropriate panel is then displayed (either **New Home Address Details** or **Current Home Address Details**). Complete the required address fields.

NOTE: If an existing address was opened from the Web Address Validation Service, then the panel will be labelled **New Home Address Details (Validated)**.

- The **Start date** for the new address is populated with the date entered previously. If you choose to edit this date, it will only be edited for the pupil/student and not for anyone else living at the same address. An end date of one day before the start date entered is automatically added to the current address.
- If the new address is for a limited time, enter an **End Date**.
- Click the **Save** button on the toolbar to confirm the change of address.

Recording Telephone Numbers and Email Addresses

Pupil/student telephone and email addresses can be recorded separately to the numbers/email addresses of their contacts.

Recording Telephone Numbers

A range of telephone numbers can be recorded for a pupil/student and their contacts.

Setting a number as **Main** indicates the most likely number on which they can be contacted.

IMPORTANT NOTE: Only one **Number** per **Device** type (e.g. **Telephone** or **Fax**) can be set as **Main**.

Only one **Primary** number can be recorded for a pupil/student and this is the number that should be used in the first instance in any communication with their parent/guardians, e.g. if their child is taken ill at school.

- Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
- Click the **Telephone and Email Addresses** hyperlink to display the **Telephone and Email Addresses** panel.

- Click the **New** button or highlight an existing number then click the **Open** button adjacent to the **Telephones\Fax Number** panel to display the **Add/Edit Telephone\Fax** dialog.

The screenshot shows a dialog box titled 'Add Telephone\Fax'. It has a 'Telephone details' section with the following fields:

- Device:** A drop-down menu with 'Telephone' selected.
- Location:** A drop-down menu with 'Home' selected.
- Number:** A text box containing '0789123456'.
- Main:** A drop-down menu with 'Yes' selected.
- Primary:** A drop-down menu with 'No' selected.
- Notes:** A large empty text area.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- Select the type of **Device** (**Telephone** or **Fax**) from the drop-down list.
- Select the **Location** (**Home**, **Work**, **Mobile**, etc.) from the drop-down list.
- Enter the telephone or fax **Number**.

NOTE: The format of the telephone/fax number is optional. STD codes can be inserted in brackets if required and spaces can be added between the STD code and number if preferred.

- Indicate whether this is the **Main** number by selecting either **Yes** or **No** from the drop-down list. Only one **Number** per **Device** type (e.g. **Telephone** or **Fax**) can be set as **Main**. It is recommended that the main number is the number to be used in the event of an emergency.
- Indicate if this is the **Primary** phone number by selecting **Yes** from the drop-down list. Only one phone number per contact can be set as **Primary**.
- Enter any relevant **Notes** that may apply to the use of this telephone/fax number, e.g. No answer machine.
- Click the **OK** button to add the number. Repeat as required. Any numbers added are displayed in the **Telephones\Fax Numbers** panel.

The screenshot shows a panel titled '4 Telephones and Email Addresses'. It contains two main sections:

- Telephones\Fax Numbers:** A table with columns: Device, Location, Number, Main, Primary, Notes. It contains two rows:

Device	Location	Number	Main	Primary	Notes
Telephone	Mobile	0733311463			
Telephone	Home	0789123456	Yes		
- Email Addresses:** A table with columns: Address, Location, Main, Primary, Notes. It contains one row:

Address	Location	Main	Primary	Notes
ParentA@example.com	Home	Yes		

Below each table are buttons for 'Set Primary' and 'Set Main'. On the right side of the panel are buttons for 'New', 'Open', 'Delete', and 'Send'.

11. If required, change the **Main** number by highlighting it and clicking the **Set Main** button. Similarly, the **Primary** number can be changed by highlighting it then clicking the **Set Primary** button.
12. Click the **Save** button on the toolbar to save the new phone number.

Recording Email Addresses

A range of email addresses can be recorded for a pupil/student and their contacts.

A **Main** email address can be set for each location (e.g. **Home** and **Work**). Setting an address as **Main** for a location indicates the most likely address (at that location) at which they can be contacted.

Only one **Primary** email address can be recorded for a pupil/student and this is the address that should be used in the first instance in any communication with their parent/guardians.

1. Click the **New** button or highlight an existing email address then click the **Open** button adjacent to the **Email addresses** panel to display the **Add/Edit Email** dialog.

2. Specify the **Location** of the email address (**Home**, **Work** or **Other**) from the drop-down list.
3. Enter the email **Address**. The field remains red until both an @ symbol and a full stop have been included in the email address.
4. Specify whether this is the **Main** email address by selecting either **Yes** or **No** from the drop-down list.
5. Indicate if this is the **Primary** email address by selecting **Yes** from the drop-down list. Only one email address per contact can be set as **Primary**.
6. Enter any relevant **Notes** that may apply to the use of this email address, e.g. only checked every few days.

- Click the **OK** button to add the email address. Repeat as required. Any email addresses added are displayed in the **Email Addresses** panel.

4 Telephones and Email Addresses

Telephones/Fax Numbers

Device	Location	Number	Main	Primary	Notes
Telephone	Mobile	0733311463			
Telephone	Home	0789123456	Yes		

New
Open
Delete

Email Addresses

Address	Location	Main	Primary	Notes
ParentA@example.com	Home	Yes		

New
Open
Delete
Send

- Change the main email address if required, by clicking the **Set Main** button. Similarly, the primary email address can be changed by highlighting the required address then clicking the **Set Primary** button.
- Click the **Save** button on the toolbar to save the new email address.

Sending Emails

Once an email address has been entered for a pupil/student, a **Send** button appears on the far right of the **Email Addresses** panel.

Email Addresses

Address	Location	Main	Primary	Notes
ParentA@example.com	Home	Yes	Yes	
ParentB@example.com	Home			

New
Open
Delete
Send

Set Primary Set Main

- Clicking the **Send** button launches a MAPI compliant email dialog (such as Microsoft® Outlook or Outlook Express). The **To** field is automatically populated with the contact's email address.
- Enter the required text and send the email in the usual way.

NOTE: You will not be able to use this functionality unless you have a MAPI compliant email application installed on your PC.

Adding /Editing Family /Home Information

The **Family /Home** panel enables schools to record details of a pupil/student's family members, guardians or emergency contacts. Details of how to contact these people in the event of an emergency can also be recorded. To facilitate the recording of contact information, a pupil/student's home address and telephone number is copied across to any new contact associated with them (if this information is recorded).

- Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.

- Click the **Family / Home** hyperlink to display the **Family / Home** panel.

A contact who currently resides at the same address as the pupil/student can be identified by a **House** icon beside their name.

- Click the **New** button adjacent to the **Contacts** panel to display the **Add Contact for** dialog.

- Enter the contact's **Surname**, **Forename** and select their **Gender** from the drop-down list. Click the **Continue** button to proceed. This process searches SIMS to see if the contact already exists (to ensure that duplicate contacts are not added).

Any people already entered in SIMS who match the search criteria entered are displayed in the **Matched People** panel at the bottom of the dialog.

Contact Details

Basic Details

Surname: Forename:

Gender:

Matched People

The following people known to the SIMS database have similar details.
To add a new Contact with the details entered above, select New.
To add an existing person or edit a known Contact, select Open.

Full name	Gender	Roles	Address
Smith, Mrs Jessica	Female	Contact	338 Gladstone Street Peter...
Smith, Mrs Jessica	Female	Contact	3 Kaplan Close Shenley Lo...

2 matches found

- If the required contact is displayed in the list, then they have previously been added to SIMS. Highlight their name and click the **Open** button to display their details in the **Contact Details** page for this pupil/student or applicant, where they can be edited as required. Click the **Save** button to save any changes then click the **OK** button to add the contact.
- If the required contact is not displayed in the list, you will need to add them. Click the **New** button to create a new contact. A blank record is created and displayed in the **Add Contact for [Name]** dialog.

*NOTE: Regardless of the method used to add a contact, if the pupil/student has a home address and a telephone number recorded, the contact will be given the same address and telephone number automatically. This is confirmed via a message when you click either the **Open** or **New** button. The address or telephone number can be edited on the following screen, if required.*

The screenshot shows the 'Add Contact for Erica Smith' window. The 'Basic Details' tab is selected, displaying fields for Title, Forename (Jessica), Middle Name(s), Surname (Smith), Gender (Female), Date of Birth, Honours, Salutation, Addressee, and Parental Ballot. A photograph placeholder is also present. The 'Relationship Details' tab shows fields for Student (Erica Smith), Contact Type, Priority, and Contact Priority Source. The 'Telephones and Email Addresses' tab is partially visible at the bottom.

Recording Basic Details

1. Select the contact's **Title** from the drop-down list.
2. Enter any known **Middle Name(s)** for the contact.
3. Enter the contact's **Date of Birth**, or click the **Calendar** button and select the required date.
4. Enter the contact's **Honours** if applicable. They may have letters after their name, e.g. MSc, PhD, etc.
5. Select the **Parental Ballot** check box if the contact is entitled to vote in a parental ballot.

When there is a vacant position for a parent governor in the school, it is necessary to contact all the people who are eligible to stand for election and who are eligible to vote for the final candidates. All contacts who have parental responsibility for children on-roll are eligible for the election.

6. To facilitate identification, it is possible to store photographs of pupil/student contacts. Click the **Select Files** button and navigate to the location of the contact's stored image. Highlight the required file then click the **Open** button to attach the image to the contact.
7. Click the **Generate** button adjacent to the **Salutation** and **Addressee** fields to display default text that will be used in correspondence, etc.

*NOTE: The **Generate** buttons are only effective if the contact's **Title**, **Forename** and **Surname** fields have all been populated.*

It is possible to change the information displayed in the **Salutation** and **Addressee** fields by over-typing the existing information and clicking the **Save** button. The **Generate** buttons can be used to refresh the information. However, this results in previously amended information being restored to the default.

Completing Relationship Details

1. In the **Relationship Details** panel, the **Pupil (or Student)** name is already populated.
2. Select the contact's **Contact Type** with the pupil/student. This indicates whether the contact is a family member, e.g. a child minder, etc.
3. Select the **Correspondence** and/or **Pupil Report** check boxes if required.

***IMPORTANT NOTE:** By default, all contacts who have the same address as the pupil/student or applicant will automatically receive correspondence about the child (including the Pupil Report). It is necessary to select either the **Correspondence** and/or **Pupil Report** check box only if the contact does not live with the pupil/student or applicant, but wishes to receive correspondence and/or the Pupil Report. This may be required for separated parents, for example.*

4. The **Parental Responsibility** check box is used to identify whether the contact is considered a parent. A parent includes:
 - All natural parents, whether they are married or not.
 - Any person who, although not a natural parent, has parental responsibility for the pupil/student.
 - Any person who, although not a natural parent, has care of the pupil/student in the sense that they live with and look after them.
5. Enter a **Priority** for the contact within the range of 1 – 10, with 1 being the highest priority and 10 the lowest. The priority indicates the order in which contacts are alerted in the event of an accident or incident concerning the associated pupil/student or applicant.

NOTE: It is possible to have more than one person with the same priority. You may for example, want both a mother and father to be a priority 1.

6. Select the **Court Order** check box if a court order is in place, restricting this contact's access to the associated pupil/student or applicant.

7. Select the **Contact Priority Source** from the drop-down list. This gives an indication of where the priority source information came from, e.g. parent, child, etc.
8. Click the **Save** button to save the details.

Adding /Editing a Contact's Telephone and Email Address Information

The process of recording and editing a contact's telephone and email address information is the same as that for the recording of a pupil/student's telephone and email address information, except that the information is entered via the **Telephones and Email Addresses** panel of the contact's **Add/Edit Contact for...** dialog.

This is accessed by clicking the **Family / Home** hyperlink in the required **Pupil (or Student) Details** page, and clicking the **New** button to add a new contact or the **Open** button to edit an existing one (please see *Recording Telephone Numbers and Email Addresses* on page 194).

Adding /Editing a Contact's Address Information

1. After searching for an existing contact to ensure that their details have not already been added to SIMS, click the **New** button, or click the **Open** button to edit their existing details.
2. Click the **Addresses** hyperlink to display the **Addresses** panel.

The screenshot shows the '3 Addresses' panel in the SIMS system. It displays the 'Current Home Address Details (Validated)' for a contact. The address is 'Dalwood Lodge, 1 Ely Road, Milton, Cambridge, CB24 6DD, United Kingdom' with a UPRN of '10003191315'. To the right of the address details are buttons for 'Delete', 'Modify Address', 'Move House', and 'Validate'. Below the address details is a 'Note' field. Further down are fields for 'Start date' (25/10/2012) and 'End date'. Below these are fields for 'Post Code', 'Country' (United Kingdom), and 'House Number/Name'. At the bottom are two checkboxes: 'Search Validation Service' and 'Search Existing Addresses'. On the right side of the panel are buttons for 'Continue' and 'Advanced'.

3. By default, the **Home address can be disclosed** check box is selected. This indicates whether the contact's home address can be disclosed to ex-marital partners. Deselect this check box to prevent the address being disclosed.

NOTE: If the **Home address can be disclosed** check box is deselected, SIMS reports do not produce details of this address.

4. By default, the **Home address can be transferred** check box is selected. Deselect this check box if there is concern about the validity of the address details and if so, they should not be transferred to other related individuals. When this check box is deselected, the contact's address information will not be transferred via CTF.

5. To amend any incorrect information in the current address, click the **Modify Address** button. Click the **Yes** button to continue. Make the applicable changes, then click the **Save** button in the top-left hand corner.
6. To enter a new or additional address, enter the **Post Code** and the **House Number/Name**, if applicable, in the **Enter (additional) address** section.
 The validation rules on the **Post Code** field enable the input of British Forces Post Office (BFPO) addresses. If a valid BFPO number is entered in BFPO 100 format, SIMS will not request that the **Country** field is completed.
 The **Post Code** field is checked against an external address database which is accessed across the Internet as a Web Service.
 Initially, the external database is managed and maintained by CCS. It contains Quick Address Systems (QAS) data. The **Advanced** button can be used if the post code is not known. This searches SIMS for existing address matches but does not access the external database.
 Existing addresses that already have a number of data fields completed but do not contain a post code, can be validated against the external database using the **Validate** button on completion of the **Post Code** field. Users opting to validate an address must bear in mind that this process replaces any incorrect address data that may already be held. The Address Validation Service functionality is available to schools that have obtained the licence key.
 Once an address has been validated, the **UPRN** (Unique Property Reference Number) is displayed in the **Current Home Address Details** field.
7. The **Country** field defaults to **United Kingdom** but can be altered via the drop-down list. This is a mandatory field. If the country is not specified, you will be unable to save the details, unless the **Post Code** field contains a BFPO number. Overseas addresses must be entered manually and are not subject to validation.
8. Click the **Continue** button to display the **Find Matching Addresses** dialog.
9. Double-click the relevant address. This returns you to the **Addresses** panel, where the address fields are populated with the details selected. Alternatively, click the **New** button in the **Find Matching Addresses** dialog to create a new address.
10. Clicking the **Address** button in the top left-hand corner of the **Addresses** panel launches the selected mapping website link, specified through the **User Options** screen.

Adding / Editing a Contact's Language and Job Details

1. Select **Focus | Person | Contacts** to display the **Contacts** page.
2. After searching for an existing contact, click the **Language** hyperlink to display the **Language** panel.

5 Language			
First Language:	English	Translator Required	☐
6 Job Details			
Place of Work:	BBC	Job Title:	Television Presenter
Occupation:	Media	NI Number:	

3. Select the contact's **First Language** from the drop-down list and if a language barrier exists, select the **Translator Required** check box.
4. In the **Job Details** panel, enter the contact's **Place of Work**.
5. Select their **Occupation** from the drop-down list and enter their **Job Title**.
6. Enter the contact's **NI Number**, if known.
7. Click the **Save** button to save the details.

Adding Notes/Documents to a Contact

Notes and documents can be added to provide additional information about a pupil/student's contacts. The process is the same as in several areas of SIMS, with the exception that for contacts they are added via the **Documents** hyperlink in the **Contacts** pane of the **Family/Home** panel.



More Information:

Attaching a New Note/Document on page 147

Copying Contacts

It is possible to copy contact information already recorded in SIMS from one pupil/student to another. This is particularly beneficial when another child with siblings already in your school, also joins the school. Instead of re-entering the same information for the new pupil/student, you can quickly copy the information that is already recorded against their sibling to the new family member.

1. Click the **Family/Home** hyperlink to display the **Family/Home** panel.
2. Click the **Copy** button adjacent to the **Contacts** panel to display the **Copy Contacts** dialog.

- After searching for the pupil/student whose contacts you wish to copy, double-click their name to view their existing **Contacts** in the dialog.

SIMS Copy Contacts

Select student, whose contacts you wish to copy

Search Open Print Browse Next Previous View

Surname: Forename: Admission Number: Status:

Tier: Year Group: Reg Group: House:

Name	Year Group	YTI	Reg. Group	House	Gender	Admission Number
Smith, Adam	13	13	M	Fleming	Male	003692
Smith, Tony	10	10	10A	Newton	Male	004336
Smith, Daniel	7	7	7E	Curie	Male	004790
Smith, David	12	12	K	Fleming	Male	003862
Smith, David	10	10	10F	Newton	Female	004336

Print

1 Contacts

1 Contacts

Priority	Name	Contact Type

Check All
Uncheck All

OK Cancel

13 matches found

The contacts required for copying to the new pupil/student can be selected individually by selecting the check boxes next to their names, or they can be selected or de-selected collectively using the **Check All** or **Uncheck All** buttons.

- When you have made your selection from the contacts listed, click the **OK** button to populate the new pupil/student's **Contacts** panel with the copied contacts.

Cloning Contacts

It is also possible to clone contacts from an existing pupil/student to a new pupil/student, as well as copying them from one sibling to another.

- Click the **Family / Home** hyperlink to display the **Contacts** panel.
- Highlight an existing contact from the list displayed and click the **Clone** button adjacent to the **Contacts** panel to display the **Contact Details** dialog.
- All individuals who have already been entered into SIMS and who are close matches to the existing contact selected are displayed in the **Matched People** panel. Follow the on-screen instructions to proceed with adding or editing a contact.
- If the exact contact you want to clone is displayed in the **Matched People** panel and needs no amendments, highlight their name and click the **Open** button.

The **Contact Details** dialog is displayed with the name of the selected **Contact** already populated.

If you have inadvertently selected the wrong contact from the list displayed, you can return to the **Matched People** panel by clicking the **Cancel** button.

5. Select the **Contact Type** from the drop-down list, e.g. childminder, neighbour, etc.
6. If the contact will be receiving **Correspondence** relating to the pupil/student, select the check box.
7. If the contact has **Parental Responsibility** for the child and receives the school **Pupil Report**, select the respective check boxes.
8. If there is a **Court Order** in place restricting this contact's access to the child, select the check box.
9. Enter the **Priority** for this contact. Parents and legal guardians are normally allocated the highest priority of 1. The lower the number allocated, the quicker the contact will be informed in the case of an emergency involving the pupil/student, e.g. the contact allocated the number 1 is considered to be the first port of call in the event of an emergency. Contacts who have been allocated numbers greater than 3 may not be notified at all.
10. Click the **OK** button to save the details.

Adding /Editing Parental Salutation and Addressee Information

The information stored in the **Parental Salutation** and **Parental Addressee** fields are automatically incorporated into any Quick Letters that are sent to the pupil/student's parents/guardians via the **Links** drop-down list.

1. Click the **Family / Home** hyperlink to display the **Contacts** panel.
2. Enter the **Parental Salutation** and **Parental Addressee** for the student's main contact(s).

To automatically create data in the **Parental Salutation** and **Parental Addressee** fields, click the relevant **Generate** button. Any information currently displayed in these fields is overwritten with data deemed to be accurate by the system.



Generate Button

3. Indicate whether the pupil/student should be used as the **Mailing Point** for all other related siblings in the school by selecting the check box.
4. The **Family Links** panel at the bottom of the **Family / Home** panel displays a list of any existing siblings who share contacts with the same parental responsibility as the pupil/student you are viewing. For example, there may be three pupil/students of varying ages from one family who already attend the school. This facility is read-only and the details are updated automatically by SIMS whenever changes are made to these related pupil/students.

Family Links	Name	Date of Birth	Year	Class	Gender	Date of Adm...	Date of Lea...	New Open Delete
	Aaron, Liz	01/09/2005	5	5DT	Female	17/09/2009		
	Aaron, Sophie	01/09/2005	5	5BB	Female	01/09/2009		

- Click the **Save** button to save the details.

Adding /Editing Dietary Information

The **Dietary** panel enables you to add or edit a pupil/student's meal pattern, their dietary preferences and their eligibility for free school meals.

- On the appropriate **Pupil** (or **Student**) **Details** page, click the **Dietary** hyperlink to display the **Dietary** panel.

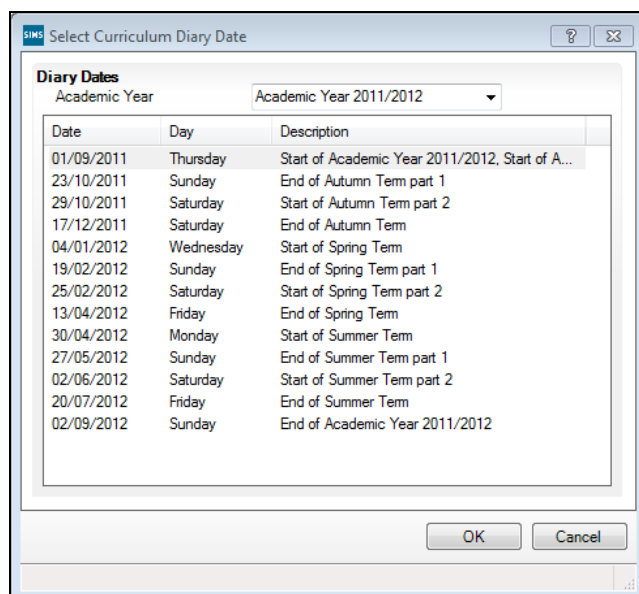
- To add a new meal pattern, click the **New** button adjacent to the **Meal Patterns** table. Alternatively, highlight an existing pattern and click the **Open** button to display the **Add /Edit Meal Pattern** dialog.

- There are three ways of entering the **Start Date** and **End Date**:

*NOTE: The **Start Date** can only be today's date or a date in the future. The **End Date** can be left open.*

- Enter the date manually.
- Click the **Calendar** button and select the required date.

- Click the **Search** button and select the appropriate **Diary Date** from the **Select Curriculum Diary Date** dialog.



Different **Academic Years** can be selected from the drop-down list. Highlight the appropriate date and click the **OK** button to return to the **Add/Edit Meal Pattern** dialog.

- For each day of the week, select the **Meal Type** from the adjacent drop-down list.
- Click the **OK** button to close the dialog and return to the **Pupil (or Student) Details** page.
- Click the **Save** button to save the changes.

Adding /Editing Free Meal Eligibility

If a pupil/student has free school meals, this must be recorded in the **Eligible for Free Meals** section of the **Dietary** panel within a pupil/students record, for the purposes of the School Census. It is possible for a pupil/student to be eligible for free school meals, but they might choose to bring sandwiches or to go home for lunch. Periods of eligibility are displayed in start date order, with the most recent displayed at the top of the table.

When recording free school meal eligibility, you must enter a **Start Date** as a minimum. The **Meal Type** and **End Date** need only be entered if known. It is however, advisable to enter an **End Date** so that you know when the eligibility runs out. It is then possible to set up a reminder to give you advance notice of when the eligibility will expire and to record the **FSM Review Date**.

1. On the **Dietary** panel, click the **New** button adjacent to the **Eligible for Free Meals** panel to display the **Add Student Free Meal Details** dialog. Alternatively, highlight an existing entry and click the **Open** button to display the **Edit Student Free Meals Details** dialog.

2. Enter the **Start Date** (mandatory) and **End Date** (if available) for the free meal period as supplied by your Local Authority.
3. The **Country** defaults according to the location of the school but can be changed by selecting an alternative option from the drop-down list.

A country must be specified for periods of eligibility that are open as of 01/09/2012, and for all periods that start thereafter.

*NOTE: The **Country** field has been introduced for CTF 12, the 2013 School Census, PRU Census and AP Census collections, to ensure that schools receive the correct Pupil Premium entitlements. The Pupil Premium is applicable only to schools in England so periods of FSM eligibility in any other country do not count when determining a pupil's eligibility for the Pupil Premium.*

4. Enter any **Notes** relating to the free school meal eligibility.
5. Click the **OK** button to add the free school meal eligibility.
6. Enter the **FSM Review Date**, if required, or click the **Calendar** button then select the required date.

Adding /Editing Free School Milk Eligibility (Welsh Primary Schools)

The ability for Welsh Primary schools to record individual student's **Eligibility for Free School Milk** has been provided as a requirement of the NAW. Any existing Free School Milk Eligibility details are displayed.

1. On the **Dietary** panel, highlight an existing entry and click the **Open** button to edit the details or click the **New** button to display the **Add/Edit Free School Milk Details** dialog.
2. Enter the **Start Date** and **End Date** (if available) for the free school milk period.
3. Click the **OK** button to add the free school milk eligibility.

Adding /Editing Medical Information

NOTE: You need to be a member of any of the following user groups in System Manager to record/edit medical information:

Administration Assistant, Admissions Officer, Pastoral Manager (not Dietary Needs), Returns Manager, Returns Operator (cannot add Dietary Needs), School Administrator, SEN Coordinator.

Please see your System Administrator/Manager if you are not sure whether you have the required Permissions.

This section describes how to add medical information to a pupil/student record including medical notes, conditions and events. This enables a record to be kept of any known conditions/ailments, medical practice contact details and any prescribed medication or past immunisations.

Many of the values that can be selected from the various drop-down lists can be edited by changing either the Medical Conditions or Medical Event Type lookups (via **Tools | Lookups | Maintain**). This allows you to amend the values to those more commonly occurring in your school. For more information, please refer to the *Importing and Maintaining Lookups* section of the *Setting Up and Administering SIMS* handbook.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

- Click the **Medical** hyperlink to display the **Medical** panel.

Medical

Emergency Consent ☒ NHS Number

Dietary Needs

☐ Artificial colouring allergy
☐ Gluten free
☐ Halal
☐ Kosher foods only
☒ No dairy produce
☐ No nuts of any type/quantity
☐ No pork

Paramedical Support

☐ Occupational Therapy
☐ Physiotherapy
☒ Speech Therapy

Medical Practice

Medical Practice	Address	Telephone No.
Medical Centre North	North Street, Peterborough	01632 559876

New Open Delete

Medical Notes

Attachment	Summary	Owner	Last Modified
	11.00am Left knee injury	Grosvenor Gillian	25/06/20
	Tooth injury - 1.25pm	Grosvenor Gillian	06/01/20
	Nose bleed - 1.22pm	Grosvenor Gillian	23/10/20

New Open Delete

Medical Conditions

Description	Information Received On

New Open Delete

Medical Events

Description	Type	Date	Follow Up
Flu	Illness	09/01/2013	

New Open Delete

Recording Medical Information

- Select the **Emergency Consent** check box if the school has obtained consent to act in the event of an emergency.
- Enter the child's **NHS Number** if known.
- Specify and **Dietary Needs** by selecting the appropriate check boxes in the scrollable list, e.g. Gluten Free.
- If the pupil/student is female and in Year 8 or above, a **Pregnant Pupil** indicator is available for selection. Select this check box if the pupil/student is pregnant.
- Specify whether the pupil/student receives **Paramedical Support** by selecting the appropriate check box from the options available, e.g. Speech Therapy.
- Schools in Northern Ireland can select whether the **Student has been Assessed Disabled** by selecting the check box.

Associating a Medical Practice with a Pupil/Student

1. Click the **New** button adjacent to the **Medical Practice** panel to display the **Add Medical Practice for** dialog.

Agency Name: Town: Postcode: Agency Type:

Agency Name	Agency Address	Contact Number	Postcode
72, Moors Bank, Wilverton		841911	
Adnitt Road Surgery	Adnitt Road, Rushden	01933 250737	NN10 9TR
Almond Surgery	Almond Road, St Neots	01480 314473	PE19 1DZ
Barleyfield Surgery, East Town		857963	
Bedwell Medical Centre	Bedwell Crescent, Stevenage	01438 311130	SG1 1LQ
Belmont Surgery	Belmont, Shrewsbury	01632 344474	SY1 1TE

Agency Details: 72, Moors Bank, Wilverton

Save Undo Print Links Help

1 Basic Details 2 Agency-Student Link 3 Addresses 4 Contact Information 5 Agents 6 Notes and Documents

1 Basic Details

Agency Name

Agency Type

2 Agency-Student Link

Relationship Type

OK Cancel

Records found: 66

2. Search for the required Medical Practice then double-click to display them in the **Agency Details** page.

*NOTE: If the required medical practice does not exist, they need to be added by clicking the **New** button (please see Recording a Medical Practice on page 213).*

3. Click the **Save** button to save the association then click the **OK** button. The selected Medical Practice is displayed in the **Medical Practice** panel.

Medical Practice	Address	Telephone No.
Medical Centre North	North Street, Peterborough	01632 559876

New Open Delete

Recording a Medical Practice

1. Click the **New** button adjacent to the **Medical Practice** panel to display the **Add Medical Practice for:** dialog.

2. Check that the medical practice does not already exist by entering the required search parameters in the **Agency** browser and clicking the **Search** button. If the medical practice does not already exist, proceed to step 4 in *Adding an Agency* (please see Adding an Agency on page 229).
3. Once the required medical practice has been selected or added, click the **Save** button then the **OK** button to add them to the selected pupil/student record.

Recording Medical Notes

Medical notes are used to add/display any additional medical information to the pupil/student record. They can be added directly in the **Medical Note** panel, or they can be notes attached to a **Medical Condition** or a **Medical Event**. You may for example, wish to add information about medication required for a specific medical condition or about an exercise that should not be undertaken, e.g. Should not go swimming.

*NOTE: Medical notes attached to medical events or conditions appear in the **Medical Note** panel once the record has been saved.*

1. Click the **New** button adjacent to the **Medical Notes** panel to display the **Add Note/Document** dialog.

The Type field defaults to **Pupil** (or **Student**) **Medical Note**.

2. Attach the document (please see *Attaching a New Note/Document* on page 147).

Adding /Editing Medical Conditions

This section should be used to record information on any known medical condition, such as asthma, epilepsy, etc.

1. Click the **New** button adjacent to the **Medical Conditions** panel to display the **Add Medical Condition** dialog.
2. Select the required **Medical Condition** from the drop-down list, e.g. Asthma.

3. Enter the **Info. Received Date** or click the **Calendar** button and select the required date.
4. If required, you can add further detail by adding a medical note to the condition such as information on medication relating to the condition (as shown in the previous graphic). To add a medical note to a medical condition, click the **New** button adjacent to the **Notes/Documents** panel to display the **Add Note/Document** dialog. Follow the instructions for adding a medical note (please see *Attaching a New Note/Document* on page 147).
5. Click the **OK** button to save the medical condition.

Adding /Editing Medical Events

The **Medical Events** panel is used to record medical events such as immunisations, accidents, illnesses suffered, etc. Recording medical events can be used as an alternative to manually recording such events in accident books, etc.

1. Click the **New** button adjacent to the **Medical Events** panel to display the **Add Medical Event** dialog.

2. Select the Event Type from the drop-down such as Immunisation, Accident, Illness or Medical Inspection.
3. Select an appropriate **Description** that relates to the **Event Type** as required.

*NOTE: The options in the **Description** drop-down list change according to the **Event Type** selected.*

4. Enter the **Start Date** of the event or click the **Calendar** button and select the required date.
5. Enter any **Follow Up Date** if for example, a booster is required.
6. If required, you can add further detail by adding a medical note to the event. To add a medical note to a medical event, click the **New** button adjacent to the **Notes / Documents** panel to display the **Add Note / Document** dialog. Follow the instructions for adding a medical note (please see *Attaching a New Note/Document* on page 147).
7. Click the **OK** button to add the medical event.

Adding /Editing Ethnic /Cultural Information

The **Ethnic /Cultural** panel is used to record ethnic/cultural information such as ethnicity, home language, traveller status. Some fields must be recorded to prevent validation errors when producing statutory returns such as the School Census.

NOTES: Welsh and Northern Ireland schools see some additional fields which are described in the applicable sections.

The **Home Language** is no longer collected by the School Census and the field can be disabled throughout SIMS by selecting the **Hide Home Language** check box in **Tools | Setups | School Options**.

Many of the values that can be selected from the various drop-down lists can be edited by changing the applicable lookups (via **Tools | Lookups | Maintain**). For example, some faith schools may wish to change the values in the **Home Religion** lookup to reflect their religions and map them to the appropriate DfE. Please consult with your Local Authority before making any changes.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

8 Ethnic/Cultural

Ethnicity White - English Ethnic Data Source Provided by the parent

First Language English Religion Christian

First Language Source Provided by the parent English Additional Language

Asylum Status Traveller Status

National Identity English Speaks Welsh

Home Language English

Country of Birth United Kingdom

Nationality and Passport Details

Nationality	Passport Number	Passport Expiry date

Proficiency in English

Date of Assessment	Level
27/04/2016	E - Fluent

New Open Delete

New Open Delete

History

3. Select the **Ethnicity** and the **Ethnic Data Source** (the person who determined the ethnicity) from the drop-down lists as required.

NOTES: All pupil/students aged 5 and over should have an ethnic category assigned to them. If the information has not yet been collected, select **Information Not Yet Obtained** from the drop-down list. If the parent has refused to give this information, select **Refused** from the drop-down list.

Northern Ireland schools only - If the pupil/student has an ethnicity recorded of **Irish Traveller** then it is advisable to record the appropriate accommodation type.

4. Select their **Home Language** (if enabled), **First Language**, **National Identity** and **Religion** from the respective drop-down lists.

IMPORTANT NOTE: When creating an application for a prospective student that is linked to an agency, or contact (e.g. parent) (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the recorded religion is transferred automatically from the agency's record to application's record.

5. If the pupil/student's first language is not English, select **Yes** from the **English Additional Language** drop-down list.
6. If the pupil/student is an asylum seeker or refugee, select the appropriate value from the **Asylum Status** drop-down list, e.g. Refugee.

*NOTE: An **Asylum Status** of **Refugee** should only be selected when their application for asylum has been accepted by the Home Office. Asylum Seekers are pupil/students who have lodged a claim for asylum and are waiting for a decision to be made.*

7. English and Welsh schools can select a pupil/student's country of birth. Click the **Browser** button adjacent to the **Country of Birth** field, then select the required country. Click the **OK** button.

Welsh schools see additional data fields in the **Ethnic/Cultural** panel:

Specify whether the child speaks **Welsh at Home**, **Speaks Welsh with Parents**, is **Taught Welsh at School**, is of a **Welsh Data Source** or **Speaks Welsh with Siblings**, by selecting from the relevant drop-down lists. If the pupil/student is **Taught Lessons Other Than Welsh Through the Welsh Medium**, select the check box.

Schools in Wales must record details of any new pupil/students who have entered the education system since February 2002, who were not previously educated in an English or Welsh based education system. The acronym for this data field is NEWBES (Non English/Welsh Based Education System).

- If a new pupil/student conforms to this ruling, select the **Previously educated in a NEWBES** check box.
- Specify the **Date of Entry (NEWBES)** by clicking the **Calendar** button and selecting the date. This represents the date that the new pupil/student entered the country.

Northern Ireland schools see additional data fields in the **Ethnic/Cultural** panel:

- If the pupil/student spends **Time Taught Through Irish Medium**, select the check box to indicate this.

Recording Traveller Status

The DfE and NAW require schools to report the numbers of traveller pupil/students that are on-roll and whether they are living in houses, travelling from place to place, etc. SIMS enables you to record a history of travelling children's locations. The Department of Education for Northern Ireland also request similar data to be collected.

1. Click the **Open** button adjacent to the **Traveller Status** to display the **Traveller details** dialog. Any existing traveller details are displayed.

From	To	Traveller Status	Data Source
02/10/2015		Gypsy/Roma (Housed)	Provided by the parent

Traveller Status Data source

From To

Update Details

OK Cancel

NOTE: Schools in Northern Ireland see **Accommodation Type** in place of **Traveller Status**.

2. Double click any existing traveller details to edit them or click the **New** button to activate the applicable fields.
3. Select the relevant **Traveller Status** (mandatory) from the drop-down list. Schools in Northern Ireland should select an **Accommodation Type** from the drop-down list.
4. Select the **Data source** from the drop-down list. This indicates where the information was obtained from, e.g. **Parent**.
5. Specify the period **From** and **To** by clicking the respective **Calendar** buttons and selecting the date. The **From** date is mandatory although it may not be possible to complete the **To** date, at this stage.
6. Click the **Update Details** button to save the information.
7. Click the **OK** button to close the dialog. The selected status is displayed in the **Traveller Status** field on the **Ethnic/Cultural** panel.

Recording Nationality and Passport Details

1. Add new nationality and passport details by clicking the **New** button adjacent to the **Nationality and Passport Details** panel. Alternatively, select an existing item from the list and click the **Open** button.

SIMS Add Student Nationality

Nation Details
 Nation: United Kingdom

Passport Details
 Passport Number: PM1234567890
 Issue Date: 01/01/2017
 Expiry Date: 01/01/2027
 Name On Passport: Graham Abbess
 Visa Number: V1234567890
 Visa Expiry Date: 01/01/2018

OK Cancel

2. From the **Add Pupil/Student Nationality** dialog, click the **Browse** button adjacent to the **Nation** field to display the **Nation** browser.

SIMS Nation Browse

Nations Browse
 Search Print

Name:

Name

- Tunisia
- Turkey
- Turkmenistan
- Turks and Caicos Islands
- Tuvalu
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom**
- United States
- Uruguay
- US Virgin Islands
- Uzbekistan
- Vanuatu
- Venezuela
- Vietnam
- Wallis and Futuna
- Yemen

OK Cancel

3. To facilitate selection, **United Kingdom** is highlighted automatically. To select a different nationality, enter the first few initials of the nation, highlight the required nation then click the **OK** button to populate the **Nation** field.
4. Enter the **Passport Number**, **Name On Passport** and **Visa Number**, and enter dates in the **Issue Date**, **Expiry Date** and/or **Visa Expiry Date** fields as required.

- Click the **OK** button. The **Nationality**, **Passport Number** and **Passport Expiry date** are displayed in the **Nationality and Passport Details** panel.

Nationality and Passport Details	Nationality	Passport Number	Passport Expiry date	  
	United Kingdom	PM1234567890	30/05/2014	

- Click the **Save** button to save the ethnic/cultural information.

Recording Tier 4 Information

If a school records Tier 4, they are able to view and maintain Tier 4 information for their pupil/students and applicants.

- Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser.
- After searching for a pupil/student's details, highlight their name from the list displayed and double-click to view their entire **Pupil (or Student) Details** page.
- Click the **Tier 4 Details** link in the **Links** panel on the right-hand side of the page to display the **Tier 4 Details** page.

1 Basic Details

Name	Rosanna Amoso	Region	EEA
Nationality	Italy	Place of Birth	Rome
Country of Birth	Italy	Passport Seen	☒
Notes	☐ Passport/ID Scanned		

2 Immigration History

Visa Type	Issue Date	Expiry Date	Visa Status	CAS Assignment	CAS Reference
Tier 4 child	01/02/2017		Granted		

Selected Visa Details

Visa Type	Tier 4 child	Police Registration Required	☐
Visa Status	Granted	Police Registration Date	
Visa Issue Date	01/02/2017	Entry Date	

- The pupil/student's **Name**, **Nationality** and **Country of Birth** are populated automatically and cannot be amended.
- Select the **Region** of the country of birth (e.g. **EEA** for Italy or **International** for China) from the drop-down list and enter the **Place of Birth**.
- If applicable, select the **Passport Seen** and **Passport / ID Scanned** check boxes and enter any **Notes**.
- In the **Immigration History** panel, click the **New** button to create a new Visa record. Alternatively, select an existing record to view its details in the **Selected Visa Details** and **Selected CAS Details** panels. Click the **Delete** button to delete a record.

3. Select the pupil/student's **Level** from the drop-down list, based on the following gradings:
 - **A - New to English**
 - **B - Early acquisition**
 - **C - Developing Competence**
 - **D - Competent**
 - **E - Fluent**
 - **N - Not yet assessed.**
4. Click the **OK** button. The **Date of Assessment** and **Level** are now displayed in the **Proficiency in English** panel.

Proficiency in English	Date of Assessment	Level	 New  Open  Delete
	27/04/2016	E - Fluent	

5. Click the **Save** button to save the ethnic/cultural information.

Adding / Editing Additional Information

The **Additional Information** panel is used to record information on Pupil Premium eligibility, modes of transport, Connexions Assent (Secondary schools only), etc.

Many of the values that can be selected from the various drop-down lists can be edited by changing, for example, the **Route** lookups (via **Tools | Lookups | Maintain**). This allows you to amend the values to those more commonly used in your school. It is advisable to contact your Local Authority before editing any of these values.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.

- Click the **Additional Information** hyperlink to display the **Additional Information** panel.

9 Additional Information

Meals

☐ Free Meal
☒ Home
☐ Sandwiches

Modes of travel

☐ Boarder - not applicable
☐ Bus (type not known)
☒ Car Share (with child/children)

Service Children in Education Yes

Uniform Allowance ☐

Pupil Premium Indicator for year 2012/2013 ☐ Notes

Recoupment

Youth Support Services Agreement

Route

LA Provided Transport ☐

Source of Service Children in Education Provided by the parent

Learner Support

Learner Support Code	Award Date	Notes

Eligible for Free School Transport

Start Date	End Date

Linked Agencies

Agency Name	Address	Telephone No.

Linked Agents

Name	Address	Relation Type

Recording Meal Information

Identify the most frequent meal type that the pupil/student has by selecting the relevant check box from the **Meals** options available.

The **Meals** section will be removed in a future release, because the meal information is now entered via the **Dietary** panel (please see *Adding/Editing Dietary Information* on page 207).

Recording Recoupment Information

1. If the pupil/student lives in a different Local Authority, the school is entitled to claim the cost of education directly from that Local Authority. If this is the case, click the **Browser** button adjacent to the **Recoupment** field to display the **Select Local Authority** dialog.

Name	LA number
England	ENG
City of London	201
Camden	202
Greenwich	203
Hackney	204
Hammersmith & Fulham	205
Islington	206
Kensington & Chelsea	207
Lambeth	208
Lewisham	209
Southwark	210
Tower Hamlets	211
Wandsworth	212
Westminster	213
Barking & Dagenham	301

2. Enter the **LA name** and/or **LA number** and click the **Search** button or leave the fields blank to list all available authorities.
3. Highlight the required LA then click the **OK** button to select them.

Recording Connexions Assent Information (Secondary schools only)

Select the applicable **Youth Support Services Agreement** status from the drop-down list.

Recording Travel Information

This section allows you to record information on the way in which pupil/students travel to school and may need to be regularly updated.

The DfE and Department for Transport have a joint 'Travelling to School' initiative, which sets out a programme of activity for schools, LAs and Central Government to increase walking, cycling and the use of public transport and to reduce car use for journeys to and from school.

If you have an approved Travel Plan as part of this DfE initiative, then you are required to provide pupil/students' usual mode of travel for the School Census. Schools not taking part in the DfE initiative do not need to return travel information at this time, although if it has been recorded, it will be included in the School Census return. All English schools will be required to have a Travel Plan and provide the relevant information by 2010.

Where a pupil/student uses more than one mode of travel for each journey to school, the longest element of the journey by *distance* should be recorded. For example, a pupil/student who travels five miles by car and then walks the last mile to school, should be recorded as Car/Van. Car Share covers both informal and formal car share arrangements.

It is recommended that information is collected from pupil/students (or parents) in the Autumn as this will limit the burden for English schools at School Census time, perhaps by including the item on Data Checking sheets.

9 Additional Information

Meals

☐ Free Meal

☐ Home

☐ Sandwiches

Modes of travel

☐ Boarder - not applicable

☐ Bus (type not known)

☒ Car Share (with child/children)

Recoupment

Route

LA Provided Transport ☐

1. Identify the most frequent **Modes of travel** by selecting the relevant check box (only one check box can be selected).
2. Select the required **Route** from the drop-down list. Additional routes can be added via **Tools | Maintain Lookups**.
3. If the transport is provided by the Local Authority, select the **LA Provided Transport** check box.

Adding /Editing Eligibility for Free School Transport

1. In the **Eligible for Free School Transport** panel, any existing **Free School Transport Eligibility** details are displayed.

Eligible for Free School Transport

Start Date	End Date
02/10/2015	10/12/2015

New
Open
Delete

2. Highlight an existing entry and click the **Open** button to edit the details or click the **New** button to display the **Add /Edit Free School Transport Eligibility** dialog.

SIMS Add Free School Transport Eligibility ...

Start Date 02/10/2015

End Date 05/12/2015

OK Cancel

3. Specify the **Start Date** and **End Date** of the **Free School Transport Eligibility** period by clicking the applicable **Calendar** button and selecting the required date.
4. Click the **OK** button to save the details.

Adding Service Children Information

Two new data items were introduced in the Spring School Census 2008. The Service Children in Education Indicator is also required for the ISC return as of 2017:

- **Service Children in Education Indicator**
This indicates if a child has a parent or parents who are service personnel, serving in regular military units of all forces and exercising parental care and responsibility. The information helps to identify both the impact that being a service child has on their education and the impact that catering for large numbers of service children has on the school.
- **Source of Service Children in Education Indicator**
This indicates the source of the Service Child in Education indicator, e.g. parents, school, pupil/student.

These two fields should therefore be completed for any pupil/student with a parent or parents who are service personnel.

1. Select the appropriate option from the **Service Children in Education** drop-down list.
2. Select how the school was notified about this information by selecting from the **Source of Service Children in Education** drop-down list.

Recording Uniform Allowance

Select the **Uniform Allowance** check box to indicate whether the pupil/student receives a contribution from the LA or Social Services to help towards the cost of their school uniform.

Recording Pupil Premium Information

The Pupil Premium is an amount of money paid to schools for any pupil who has been eligible for Free School Meals at any time in the last six years. Schools have the freedom to spend the premium in a way they think best supports the raising of attainment for these pupils. It is now possible to record and monitor the progress of pupils eligible for the Pupil Premium. Pupil Premium fields have also been added to the Reporting Dictionary.

1. Select the **Pupil Premium Indicator for year <current academic year>** check box to indicate whether or not the pupil/student may be eligible for the Pupil Premium.
2. Enter any **Notes** that support the decision.

- To view or edit the Pupil Premium indicator for previous or following years, click the adjacent **Browser** button to display the **Pupil Premium Indicator History** dialog.

Year	Indicator	Notes
2013/2014	☐	
2012/2013	☒	
2011/2012	☐	

NOTE: An academic year is added to this table automatically when the system date reaches 1 August of the current academic year.

The **Pupil Premium Indicator History** dialog displays a row for each of the academic years from 2011 to the next academic year.

- Select the **Indicator** check box of the academic year(s) for which you think the selected pupil/student may be eligible for the Pupil Premium.
- Enter any applicable **Notes** supporting this selection.

Adding / Editing Linked Agencies

It is possible to link the pupil/student to any existing agency, such as the Education Welfare Service, health department, Probation Service, etc.

IMPORTANT NOTES: When creating an application for a prospective student that is linked to an agency (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the linked agency is transferred automatically from the agency's record to application's record.

When adding an agency to an application record (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the linked agency is transferred to pupil/student's main record on the date they are actually admitted to the school.

Agency Name	Address	Telephone No.
Behaviour Therapy Departm...	Fairfield Road, Bedford	01234 345671

1. Click the **New** button adjacent to the **Linked Agencies** panel to display the **Add Agency for:** dialog.

2. Search for the required agency then click the **Open** button to display their details in the lower section of the dialog. If the required agency does not already exist, click the **New** button to create a new one (please see *Adding an Agency* on page 229).
3. Select the **Relationship Type** from the drop-down list in the **Agency-Student Link** panel, e.g. **LA Support**.
4. Enter a **Start Date** for the linked agency. Specify an **End Date** if the pupil/student is to be linked for a limited period only.
5. Select the **SEN Link** check box if the pupil/student is to be linked on the basis of an SEN need (this adds them as a Linked Adult in the SEN area of SIMS).
6. Click the **Save** button then click the **OK** button to add the link. Repeat for any other linked agencies.

Recording Post-16 Employment Information

It is possible for schools in England to record employment details for Post-16 students whose **Year Taught In** is 12 or above.

1. Highlight an existing entry then click the **Open** button to edit the details or click the **New** button to display the **Add/Edit Employment Details** dialog.

2. Select the **Employment Type** from the drop-down list, i.e. **Weekends out of school hours**, **Weekday(s) out of school hours** or **Schools Hours**.
3. Specify the **Start Date** of the employment period by clicking the **Calendar** button then selecting the required date.
4. Specify the **End Date** of the employment. Please note that the recording of overlapping periods of employment is not permitted.
5. Enter the number of **Hours / Week**, together with any **Notes**.
6. Click the **OK** button to save the details.

Adding an Agency

In SIMS, an 'agency' is an organisation that employs agents who have been, or will be recorded in SIMS, such as the Education Welfare Service, Local Authority Support Team, a Taxi Firm, etc. An 'agent' is an individual who has some involvement with a pupil/student and works for an agency recorded in SIMS such as Education Welfare Officers (EWOs), doctors, educational psychologists, speech therapists, etc.

Once added, one or more pupil/students can be attached to the agency. This can be particularly useful for example, for recording all the pupil/students who use a specific Behavioural Support Service.

It is advisable to add agencies to SIMS before adding individual agents. This enables agents to be attached to the required agency at a later stage.



Additional Resources:

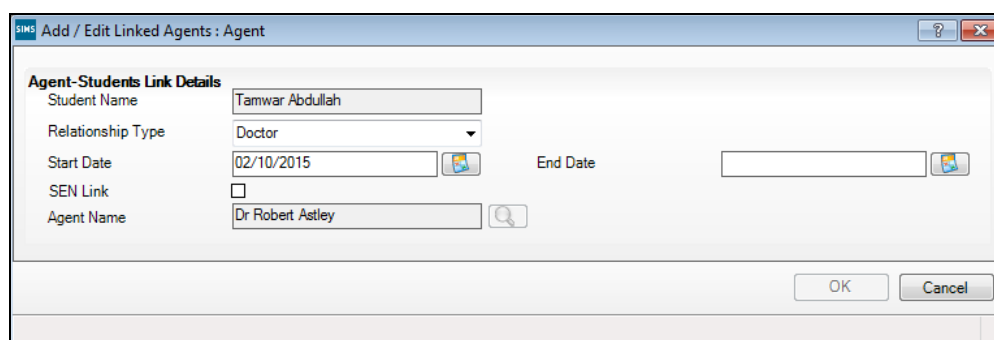
Adding an Agency section in the *General SIMS Setups* chapter of the *Setting up and Administering SIMS* handbook

Adding /Editing Linked Agents

It is possible to link the pupil/student to any existing agent, such as an Education Welfare Officer, Speech Therapist, etc.

Linked Agents	Name	Address	Relation Type	 New  Open  Delete
	Dr Robert Astley	Milton Keynes Village Practice Griffith ...	Doctor	

1. Click the **New** button adjacent to the **Linked Agents** panel to display the **Add/Edit Linked Agents** dialog.

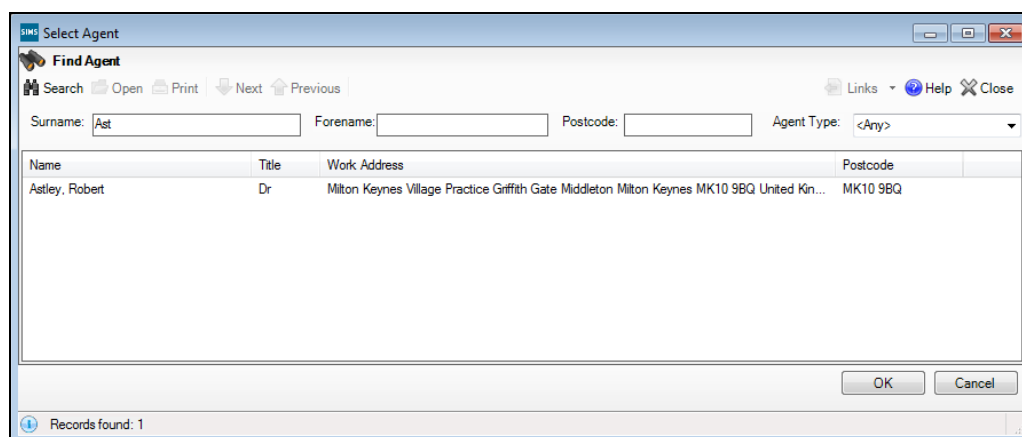


The dialog box is titled "Add / Edit Linked Agents : Agent". It contains the following fields:

- Agent-Students Link Details**
 - Student Name: Tamwar Abdullah
 - Relationship Type: Doctor (dropdown menu)
 - Start Date: 02/10/2015
 - End Date: (empty field)
 - SEN Link: ☐
 - Agent Name: Dr Robert Astley

Buttons: OK, Cancel

2. Select the **Relationship Type** from the drop-down list, e.g. Doctor.
3. Enter a **Start Date** for the linked agent. Specify an **End Date** if the pupil/student is to be linked for a limited period only.
4. Select the **SEN Link** check box if the pupil/student is to be linked on the basis of a SEN need, (this adds them as a Linked Adult in the SEN area of SIMS).
5. Search for the required agent by clicking the **Browser** button to display the **Select Agent** browser.



The dialog box is titled "Select Agent". It contains the following fields and controls:

- Find Agent**
 - Search: Open: Print: Next: Previous:
 - Links: Help: Close:
 - Surname: Forename: Postcode: Agent Type:
- Table:

Name	Title	Work Address	Postcode
Astley, Robert	Dr	Milton Keynes Village Practice Griffith Gate Middleton Milton Keynes MK10 9BQ United Kn...	MK10 9BQ

Buttons: OK, Cancel

Records found: 1

6. Highlight the required agent then click the **OK** button to select them and return to the **Add/Edit Linked Agents** dialog.
7. Click the **OK** button to add the linked agent who is displayed in the **Linked Agents** panel.

Adding /Editing Welfare Information

The **Welfare** panel is used to record welfare information including any in care, young carer, child protection and/or disabilities details. A pupil/student is considered In Care or Looked After if he or she is in the care of the Local Authority or is provided with accommodation for more than 24 hours by the authority.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Welfare** hyperlink to display the **Welfare** panel.

10 Welfare

In Care		Currently in Care				
In Care Details	Start Date	End Date	Care Authority	PEP		 New  Open  Delete
	02/08/2011		Bedford Borough	0		
Young Carer	Start Date	End Date	Notes			 New  Open  Delete
	28/03/2012		Chris is caring for his ...			
Child Protection Plan	Start Date	End Date	Authority	Notes		 New  Open  Delete
	02/08/2011		Bedford Borough	Only to be picked up by ...		
Disabilities	Start Date	End Date	Disability	Notes		 New  Open  Delete
	01/09/2011		No Disability	...		

Recording In Care Information

1. Click the **New** button adjacent to the **In Care Details** panel to display the **Add/Edit In Care Details** dialog. If there are any existing **In Care Details** in the panel, the text reads **Currently In Care**. Highlight the relevant entry and click the **Open** button to edit the existing details.

*NOTE: A minimum of **Care Authority** and **Start Date** must be supplied for the purposes of the School Census for any child who is in care.*

Care Details

Care Authority: Bedford Borough

Start Date: 02/10/2015

End Date:

Personal Education Plans

Start Date	End Date	Notes

New, Open, Delete

Plan Details

Contributor Name

New, Delete

Associated Documents

Attachment	Summary	Type	Owner

New, Open, Delete

OK, Cancel

2. Select the **Care Authority** by clicking the **Browser** button to display the **Select Local Authority** dialog.

Name	LA number
England	ENG
City of London	201
Camden	202
Greenwich	203
Hackney	204
Hammersmith & Fulham	205
Islington	206
Kensington & Chelsea	207
Lambeth	208
Lewisham	209
Southwark	210
Tower Hamlets	211
Wandsworth	212
Westminster	213
Barking & Dagenham	301

3. Search for, then double click the required care authority to select them.
4. Enter the **Start Date** and **End Date** for the in care period.

*NOTE: If the child was imported via CTF, the in care details **Start Date** defaults to the date the CTF was imported. If the actual in care **Start Date** falls after the date of admission, this should be manually amended to the correct date or date of admission.*

Recording Personal Education Plans

An individual Personal Education Plan (PEP) should be created for all pupil/students who are in care. This plan ensures that access to services and adequate support are available for the pupil/student whilst ensuring that stability is maintained and disruption to their schooling is kept to a minimum. Additionally, the plan acts as a record of progress and achievement for pupil/students with Special Educational Needs and establishes clear goals and development needs.

Every school should have a Designated Teacher who oversees pupil/students who are in care. The Designated Teacher is responsible for liaising with the various professionals who are involved with providing care, support and services for these children. They must also ensure that each child who is in care is issued with a PEP.

Start Date	End Date	Notes

1. Click the **New** button in the **Personal Education Plans** panel to display the **Add Personal Education Plan** dialog.

The dialog box titled 'Add Personal education Plan' has a title bar with 'SIMS' and standard window controls. It contains three input fields: 'Start Date' with the value '02/10/2015', 'End Date' which is empty, and a 'Comments' text area containing 'Monitor behaviour'. At the bottom right are 'OK' and 'Cancel' buttons.

2. Specify the **Start Date** and **End Date** for the period during which the PEP applies.
3. Enter any relevant **Comments** that relate to the issue of the PEP.
4. Click the **OK** button to add the PEP which is then displayed in the **Personal Education Plans** panel.

The 'Personal Education Plans' panel displays a table with the following data:

Start Date	End Date	Notes
02/10/2015		Monitor behaviour

To the right of the table are three buttons: 'New' (blue document icon), 'Open' (yellow folder icon), and 'Delete' (red X icon).

5. The **Plan Details** panel is now activated enabling details of the plan to be added. Click the **New** button adjacent to the **Plan Contributors** to add a designated teacher.

The 'Plan Details' panel is divided into two main sections:

- Plan Contributors:** Contains a 'Contributor Name' text field and a 'New' button (blue document icon) with a 'Delete' button (red X icon) below it.
- Associated Documents:** Contains a table with columns 'Attachment', 'Summary', 'Type', and 'Owner'. Below the table are 'New' (blue document icon), 'Open' (yellow folder icon), and 'Delete' (red X icon) buttons.

6. From the **People** browser, enter the required search parameters, then click the **Search** button to find the required teacher.

SimS Select People Involved in the Plan

People Browse

Search Print

Surname Forename Role

Name

- Avery, Mrs Helen
- Bates, Miss Belinda
- Boston, Mrs Sarah**
- Boswell, Mrs Jennifer
- Brooks, Mr Carl
- Brown, Mrs Charmaine
- Brown, Mrs Pauline
- Brown, Mrs Susan
- Cable, Mrs Freda
- Chard, Mrs Vicky

OK Cancel

Records found: 37

7. Highlight the required teacher then click the **OK** button to select them. Their name is displayed in the **Plan Contributors** panel. Repeat for any other required contributors.

Plan Details

Plan Contributors

Contributor Name
Mrs Sarah Boston

New Delete

8. If required, attach any relevant documents by clicking the **New** button in the **Associated Documents** panel to display the **Add Note/Document** panel. Add a document (please see *Attaching a New Note/Document* on page 147) then click the **OK** button in the **Add In Care Details** dialog to return to the **Student Details** page.
9. Once all the required information has been added, click the **Save** button on the toolbar to save the welfare information.

Recording Young Carer Information

Not applicable to schools in Northern Ireland.

The period during which a pupil/student is known to have been providing care for say, a family member, can be recorded in the **Young Carer** table, along with any details of their responsibilities as a carer.

1. Click the **New** button adjacent to the **Young Carer** panel to display the **Add Young Carer details** dialog. Alternatively to edit an existing record, highlight it then click the **Open** button to display the **Edit Young Carer details** dialog.

2. The **Start Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting an alternative date.
3. Select an **End Date**, if required.
4. Enter any **Notes** relating to the care that the pupil/student provides.
5. Click the **OK** button to return to the **Pupil (or Student) Details** page.
6. Click the **Save** button.

Recording Child Protection Plan Information

Your school may be notified that a current or potential pupil/student has a Child Protection Plan (formerly Child Protection Register). The purpose of a Child Protection Plan is to ensure that children, where concerns have been raised regarding their safety in the home, are monitored and that appropriate intervention and help is given to safeguard the child.

Children may be at risk because of neglect or physical, emotional or sexual abuse. Should a child move out of the area, the information is passed on to the new Local Authority.

A child or young person will continue to have a Child Protection Plan until it is believed that the child is safe from any future harm. A Child Protection Plan does not affect a parent's/carers' legal responsibilities towards their child/young person. Parent/Carer rights are affected only if legal action is taken to safeguard the child/young person.

Child Protection Plan	Start Date	End Date	Authority	Notes	New Open Delete
	02/10/2015		Bedford Borough	Only to be picked up by ...	

1. From the **Welfare** panel, click the **New** button adjacent to the **Child Protection Plan** table to display the **Add Child Protection Plan details** dialog.

The dialog box titled 'Add Child Protection Plan details' has a title bar with 'SIMS' and standard window controls. It contains the following elements:

- Care Authority:** A text input field followed by a magnifying glass icon.
- Start Date:** A date picker field with a calendar icon.
- End Date:** A date picker field with a calendar icon.
- Comments:** A large multi-line text area.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

2. Click the **Browser** button adjacent to the **Care Authority** field to display the **Select Local Authority** dialog.

The dialog box titled 'Select Local Authority' has a title bar with 'SIMS' and standard window controls. It contains the following elements:

- Search Criteria:** A section titled 'Enter search criteria for Local Authority' with 'Search' and 'Print' buttons.
- Search Fields:** 'LA name' (text input), 'LA number' (text input), and 'Region' (dropdown menu set to 'England').
- Table:** A table listing local authorities and their LA numbers.

Name	LA number
England	ENG
City of London	201
Camden	202
Greenwich	203
Hackney	204
Hammersmith & Fulham	205
Islington	206
Kensington & Chelsea	207
Lambeth	208
Lewisham	209
Southwark	210
Tower Hamlets	211
Wandsworth	212
Westminster	213
Barking & Dagenham	301
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

3. Enter the required search parameters then click the **Search** button to display all the matching authorities.
4. Highlight the required authority then click the **OK** button to return to the **Add Child Protection Plan details** dialog.
5. Enter the **Start Date** and **End Date** (if known) for the Child Protection Plan period.
6. Enter any applicable **Comments** then click the **OK** button to add the details to the **Child Protection Plan** table in the **Welfare** panel on the **Pupil** (or **Student**) **Details** page.

Recording Disabilities Information

1. Click the **New** button adjacent to the **Disabilities** table to display the **Add Student Disability details** dialog. Alternatively to edit an existing record, highlight it then click the **Open** button to display the **Edit Student Disability details** dialog.

2. Select the required **Disability** from the drop-down list, e.g. **Problems with Hearing**.
3. The **Start Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting an alternative date.
4. Select an **End Date**, if required.
5. Enter any **Comments** relating to the disability record.
6. Click the **OK** button to return to the **Pupil (or Student) Details** page.
7. Click the **Save** button.

Adding / Editing a Pupil/Student's School History

The **School History** panel is used to record any historical school information such as the previous school and also to record when the pupil/student leaves your school.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.

- Click the **School History** hyperlink to display the **School History** panel.

11 School History

Date of Leaving  Reason for Leaving

Destination After Leaving

Destination Institution  

Destination Expected Start Date  CMJ file sent or not required ☐ CML file sent or not required ☐

Grounds for Removal

Previous Schools

School	Date of Arrival	Date of Leaving	Reason for Leaving	Enrolment Mode

 New
 Open
 Delete

CTF Attendance

Year	School	Possible	Attended	Authorised	Unauthorised
2013	WATERS EDGE PRIMARY SCHOOL	306	205	2	99
2012	WATERS EDGE PRIMARY SCHOOL	378	256	122	0

 New
 Open
 Delete

Recording the Pupil/Student as a Leaver

- Enter the **Date of Leaving** or click the **Calendar** button and select the required date.
- Select the **Reason for Leaving** from the drop-down list, e.g. **In-year transfer - Independent school**.
- Enter their **Destination after Leaving**, such as their next school or the place they are moving to.
- Select the **Grounds for Removal** from the drop-down list.

Recording the Destination Institution

This allows you to record a student's University or Higher Education Institution once they leave your school. Click the **Search** button adjacent to the **Destination Institution** field to display the **Schools** browser.

SIMS Schools Browse

 New  Search  Print

Name

School	Head Teacher	School Address
Abbots Repton Primary School		

OK Cancel

Selecting a Destination Institution

1. To narrow your search, enter all or part of the required institution name in the **Name** field and click the **Search** button. Leaving the **Name** field blank will list all institutions.
2. Highlight the relevant institution and click the **OK** button to return to the **School History** panel.
3. Select the **Destination Expected Start Date** by clicking the **Calendar** button and selecting the required date.

Adding a Destination Institution

1. Click the **New** button in the **Schools** browser to display the **Create New School** dialog.

The screenshot shows the 'Create New School' dialog box. The 'School Details' tab is active. The '1 Establishment' section has fields for School Name (redacted), LA, Establishment Number, School Phase, School Governance, Head Teacher, and Main Contact. The 'School Purpose' list includes Partnership Monitor, Partnership School, Indirect Destination, Indirect Feeder, Feeder, and Destination. The '2 Enter address' section has fields for Post Code, House Number/Name, and Country (United Kingdom), with checkboxes for Search Validation Service and Search Existing Addresses. The '3 Contact Details' section has fields for Telephone, Email, Fax, and Website. The '4 Sites' section has a table for Additional School Sites with a Site Name column and buttons for New, Open, and Delete. The '5 Documents' section is at the bottom. The dialog has OK and Cancel buttons at the bottom right.

2. Enter the institution's details and click the **Save** button.
3. Click the **OK** button to return to the **Pupil** (or **Student**) **Details** page.

NOTE: The **Destination Institution** will also be listed under other schools (**Tools | Other Schools**)

Understanding the CMJ and CML Check Boxes

The **CMJ sent or not required** and **CML sent or not required** check boxes are displayed for schools in England and are designed to help track Children Missing in Education. They are designed to be used in conjunction with the **CME - Joiners** and **CME - Leavers** CTF file types (enabled 1 August 2017).

The **CMJ sent or not required** check box is selected automatically when a pupil/student's information is sent in a **CME - Joiners** CTF file. The **CML sent or not required** check box is selected automatically when a pupil/student's information is sent in a **CME - Leavers** CTF file.

For more information, refer to the *Children Missing in Education* document available on the My Account website (<https://myaccount.capita-cs.co.uk>).

Recording Previous Schools

It is possible to enter a pupil/student's history information for their **Previous Schools** so that a full and detailed record is available of the schools they have attended in the past.

1. Click the **New** button adjacent to the **Previous Schools** panel to display the **Add School History** dialog.

SIMS Add School History

School History Details
Enter the details of the student's registration at this school.

School

Date of Arrival

Date of Leaving

Reason for Leaving

Enrolment Mode

OK Cancel

- Click the **Browser** button to display the **Schools** browser.

School	Head Teacher	School Address
Abbots Repton Primary School		

- Enter the name/part name of the school and click the **Search** button.
- Highlight the required school, then click the **OK** button. To add a school, click the **New** button, enter its details, then click the **Save** button.
- Enter the **Date of Arrival** and **Date of Leaving** or click the appropriate **Calendar** buttons and select the required dates.
- Select the **Reason for Leaving** and the **Enrolment Mode** from the relevant drop-down lists.
- Click the **OK** button to save the details.



Additional Resources:

Adding/Editing Other Schools in the General SIMS Setups chapter of the Setting up and Administering SIMS handbook

Viewing / Recording CTF Attendance History

Schools who use Common Transfer Files (CTFs) to import and export pupil/student data in conjunction with the SIMS Attendance module, have the ability to view a pupil/student's CTF Attendance record from within their **Pupil/Student Details** page. Before this information becomes available, schools must select both **Attendance Summary** check boxes, which are located on the **Data to be Imported by Default** and **Data to be Exported by Default** panels, when configuring the **CTF Defaults** via **Tools | Setups | CTF**.

For schools that use CTF, but not SIMS Attendance, the option is available to manually enter CTF Attendance data into a pupil/student's record, if required. These schools must also ensure that they select the **Attendance Summary** check box located on the **Data to be Exported by Default** panel, when configuring the CTF defaults via **Tools | Setups | CTF**.

11 School History

Date of Leaving: Reason for Leaving:

Destination After Leaving:

Destination Institution:

Destination Expected Start Date: CMJ file sent or not required ☐ CML file sent or not required ☐

Grounds for Removal:

Previous Schools

School	Date of Arrival	Date of Leaving	Reason for Leaving	Enrolment Mode

CTF Attendance

Year	School	Possible	Attended	Authorised	Unauthorised
2013	WATERS EDGE PRIMARY SCHOOL	306	205	2	99
2012	WATERS EDGE PRIMARY SCHOOL	378	256	122	0

The **CTF Attendance** section is located at the bottom of the **School History** panel. Any existing Attendance entries are displayed.

1. Highlight an existing entry and click the **Open** button to edit the details or click the **New** button to display the **Add/Edit CTF Attendance History** dialog.

SIMS Add/Edit CTF Attendance History

Attendance History

Year:

School Name:

LEA Number: School Number:

Sessions Possible:

Sessions Attended:

Sessions Authorised:

Sessions Unauthorised:

OK Cancel

2. Enter the **Year** to which the **Attendance History** relates. The **School Name**, **LA Number** and **School Number** fields are already populated with data entered elsewhere in SIMS.
3. Enter the number of **Sessions Possible**, **Sessions Attended**, **Sessions Authorised** and **Sessions Unauthorised** and click the **OK** button to save the details.

Adding /Editing Parental Consent Information

Pupil/students can participate in various school activities, some of which may include accessing the Internet, leaving the school premises on a supervised visit, or receiving Sex Education.

To ensure that schools have sought and been given permission from parents for their children to participate in some or all of these activities, schools can indicate specifically which activities the pupil/student is sanctioned to be involved in.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page 169) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Parental Consent** hyperlink to display the **Parental Consent** panel.

12 Parental Consent

Consent Type

- ☒ Copyright Permission
- ☒ Internet Access
- ☒ Photograph Student
- ☒ Sex Education
- ☒ Data Exchange
- ☒ School Visit

Comments

A list of pre-defined **Consent Types** is displayed. These relate to different school activities that Parental Consent can be given for. The values displayed in this section can be amended via **Tools | Maintain Lookups**.

3. Select the required check boxes adjacent to the relevant **Consent Types**.
4. Record any **Comments** that relate to the Consent Types selected as required.

Recording User Defined Fields

NOTE: This section is applicable only to school administrators.

Your System Administrator may have set up User Defined Fields which enable you to record information required specifically for your schools. Examples include Parish, Single Parent Family, Car Registration Numbers, Locker Numbers, etc. These can be recorded as fields, check boxes, radio buttons, etc.

13 User Defined Fields

Parish St Andrews

Premature ☐

Single Parent Family ☐

Any such fields will be made available in the **User Defined Fields** panel which can be accessed by clicking the **User Defined Fields** hyperlink. Complete any fields as required.



Additional Resources:

Setting up and Administering SIMS handbook

Recording Leavers

If a pupil/student leaves your school for any reason, you can mark them as a leaver which removes them from your school, but enables historical records to be kept. During the Summer term, for example, you need to mark most or all pupil/students in your top year as leavers so that they are no longer on-roll at the start of the new academic year. The date of leaving and leaving destination, together with the reason for leaving can be recorded.

IMPORTANT NOTES: To ensure that historical data is accurately maintained, it is essential that you do not record leavers by removing their date of admission.

If a pupil/student who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove the date of leaving (please see Re-admitting Pupil/Students on page 297).

To ensure that information required for statutory returns (e.g. the School Census) is accurate and up to date, check that the leavers has been given an SEN Status other than **Not Assigned** and that an **Ethnicity** has been recorded before making the pupil/student a leaver.

1. Select **Routines | Pupil (or Student) | Leavers** to display the **Find Student(s)** browser.

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expected
Abbey, Grenetta	13	G	003979	01/09/2011				
Ackton, William	13	K	003923	01/09/2011				
Ahmed, Ackmar	13	L	003981	01/09/2011				
Amiel, Tanzeel	13	N	003924	01/09/2011				

2. Search for the required **Year** or **Reg Group** (or **Class**) by selecting from the appropriate drop-down lists and then click the **Search** button.

To select all the pupil/students displayed in the browser, click the **Select** button down arrow and select **All** from the drop-down menu.

To select a group of pupil/students, highlight them using any of the following methods:

- Hold down the **Ctrl** key and single-click each required pupil/student.
- To highlight sequentially listed children, single-click the first pupil in the list, hold down the **Shift** key then click the last required pupil in the list.

- Once the required pupil/students have been highlighted, click the **Select** button. The selected pupil/students are then transferred to the **Students** panel.

The screenshot shows two panels. The top panel, titled '1 Leaving Information', contains several input fields: 'Date of Leaving' (08/07/2017), 'Reason for leaving' (Normal leaving age - Employme), 'Destination after Leaving' (Work), 'Destination Institution' (empty), 'Destination Expected Start Date' (09/07/2017), and 'Grounds for Removal' (L - Left School). There are also buttons for 'Assign to All' and 'Assign to Selected'. The bottom panel, titled '2 Students', displays a table of student records with columns: Name, Year Group, Reg. Group, Adm. No., Date of Admission, Date of Leaving, Reason for Leaving, Destination, Institution, and an 'Exp' column. To the right of the table are 'Remove' and 'Clear' buttons.

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	Exp
Abbey, Grenetta	13	G	003979	01/09/2011					
Ackton, William	13	K	003923	01/09/2011					
Ahmed, Ackmar	13	L	003981	01/09/2011					
Amiel, Tanzeel	13	N	003924	01/09/2011					
Arkwright, Deborah	13	Q	003983	01/09/2011					
Bartlet, Jeremy	13	Q	003984	01/09/2011					
Boman, Chloe	13	M	003927	01/09/2011					
Buckley, Helena	13	H	003928	01/09/2011					
Burison, Angus	13	G	003929	01/09/2011					
Candy, Mandy	13	J	003932	01/09/2011					
Carr, Emilia	13	M	003988	01/09/2011					
Cassidy, Ruth	13	N	003989	01/09/2011					

- Enter the **Date of Leaving** or click the **Calendar** button and select the required date.



Calendar button

This date of leaving should be the date that the pupil/student is actually leaving the school if they are not for transferring from Junior/Primary to Secondary phase. Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not have any gaps between dates and may suggest a date of leaving (the old school) of 4th September and the date of admission (into the new school) of 5th September. If you are in any doubt, please contact your Local Authority for advice.

IMPORTANT NOTE: *It is recommended that pupil/students leaving at the end of Year 11 who may return to Year 12, are not given a date of leaving until it has been confirmed that they will be leaving the school at the end of the Summer term as this may cause issues with Attendance information.*

- Select the **Reason for Leaving** from the drop-down list, such as **Normal leaving age - Employment**.
- Enter the **Destination after Leaving** if required. Alternatively, you can apply the **Reason for Leaving** to one set of pupil/students (as described in the previous step), then select the **Destination after Leaving** for a different, or subset of pupil/students.
- Enter the **Destination Expected Start Date** or select the required date from the Calendar.
- Select the **Grounds for Removal** from the drop-down list.

9. Secondary schools in England can select a **Learning Aim Withdrawal Reason** from the drop-down list. Secondary schools in Wales can select an **LA Withdrawal Reason** (Learning Activity). When recording a **Learning Aim Withdrawal Reason** for Post 16 students, this information is used by Course Manager.

1 Leaving Information

Date of Leaving: 08/07/2017 Reason for leaving: Normal leaving age - Employme Assign to All

Destination after Leaving: Work Assign to Selected

Destination Institution:

Destination Expected Start Date: 09/07/2017 Grounds for Removal: L - Left School

Learning Aim Withdrawal Reason: Other provider (gov)

2 Students

Name	Year Gr	Financial	Personal	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	Ex
Abbey, Grenetta	13	Financial	Personal	1/09/2011					
Ackton, William	13	Exclusion	Other	1/09/2011					
Ahmed, Ackmar	13	Not Known		1/09/2011					

Remove Clear

10. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys (as described in step 2) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
11. If an error has been made, highlight the particular pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
12. To remove a pupil/student from the list, highlight their name and then click the **Remove** button.
13. To clear the contents of the fields in the **Leaving Information** panel, highlight the required pupil/student(s) then click the **Clear** button. Re-enter the information as required.
14. Click the **Save** button to save the changes. The chosen pupil/student(s) are recorded with a date of leaving on the date specified.

Adding a Pupil / Student to your Favourites

Any pupil/student can be added to your **Favourites** panel, viewed on the **Home Page**. This is useful for quickly accessing pupil/student records that you need to regularly check or update.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Pupil (or Student)** browser.
2. Enter the necessary criteria and click the **Search** button to populate the browser.
3. Click to highlight the required pupil/student and click the **Open** button to display their **Student Details** page.
4. Click the **Favourites** button to add this pupil/student to your favourites panel on the **Home Page**.

07 | Updating Pupil/Student Information in Bulk

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Introduction to Bulk Update

The facility to Bulk Update pupil/student information enables you to simultaneously assign values to a group of pupil/students, and then edit any individual exceptions if required. You may for example, wish to set the **Emergency Consent** to **Yes** for all pupil/students within a group and then edit the exceptions. It is also a useful function for finding any missing values, such as missing Ethnicity or an invalid Religion code. This can be particularly helpful when preparing for statutory returns such as the School Census.

The following information can be edited using Bulk Update.

- Birth Certificate Seen
- Boarder Status
- Country of Birth
- Disabilities
- Emergency Consent
- English Additional Language
- Ethnic Data Source
- Ethnicity
- First Language
- First Language Source
- Gifted/Talented Subject
- Home Language
- Home Religion
- Mode of Travel
- National Identity (Welsh schools)
- Nationality
- Parental Consent
- Proficiency in English (English Maintained schools)
- Pupil Premium Indicator
- SEN Provision Type
- SEN Status

- Service Children in Education
- Source of Service Children
- Speaks Welsh (Welsh schools)
- User Defined Fields (**True/False** and **Lookup** types only, as defined in **Tools | Setups | User Defined Fields**)
- Youth Support Services Agreement (Secondary schools).

Choosing the Records to Bulk Update

1. Select **Routines | Pupil (or Student) | Bulk Update** to display the **Bulk Update Pupil (or Student)** browser.

2. In the **Student Population** section, select the required **Group Type** and **Group** from the drop-down lists.

The **Group Type** indicates the type of group you wish to work with whilst the **Group** allows you to select the specific group of pupil/students to edit. For example, selecting a **Group Type** of **Year** allows you to select a specific year from the **Group** drop-down list, such as **Year 1**.

When searching for missing information, the **Group Type** is usually a field of data, such as **Ethnicity** and the **Group** will be a specific value, such as **Arab**. This shows any pupil/students who do not currently have an ethnicity recorded against them. This can be particularly useful when preparing data for statutory returns such as the School Census.

It is also possible to use this functionality to review the data entered for all the pupil/students in the school. This is achieved by selecting **Year Group** from the **Group Type** drop-down list and **<ANY>** from the **Group** drop-down list and then selecting the required **Data Item**.

3. To select a group that is no longer in use (if required), click the **Inactive** button. Inactive groups can be identified by a yellow exclamation mark icon in the drop-down list.



Inactive button

4. The **Effective Date** is the date on which the group is based and defaults to today's date, e.g. the members of Year 1 today. This can be changed if required, by entering a new date or clicking the **Calendar** button and selecting a different date. Some data items are not dated and the **Effective Date not applicable text** is displayed.



Calendar button

5. In the **Update Data Item** section, select the required **Data Item** from the drop-down list. This is the item of data that you wish to edit for the selected group of pupil/students. In the previous example, **Emergency Consent** has been selected.
6. The **Effective Date** is the date from which the data item is changed and defaults to today's date. For example, setting the date to 01/01/18 will mean that the data item will be updated from that date, up to and including today (onwards). Enter a different date if required or click the **Calendar** button and select a different date.

In some circumstances, it may be useful to edit the **Effective Date**. For example, there may be occasions when data needs to be historically edited for the purpose of statutory returns such as the School Census.

7. Click the **Search** button to display a list of pupil/students matching the selected criteria, e.g. all pupil/students in **Year 1**.

The browser may automatically minimise (if you have applied this setting in **Tools | Setups | User Options**) to increase the available screen space (click the **Browser** button to display the browser if required). Members of the selected group are displayed together with the columns of data that can be edited.

Bulk Update Emergency Consent - House: Hooke (as at 29/01/2018)					
Save Undo Print					
1 Members					
1 Members					
Name	Year Group	Assigned	Yes	No	
Aaron, Chris	7	No		✓	
Abbey, Grenetta	13	No		✓	
Able, Cameron	12	No		✓	
Ackton, Stan	11	No		✓	
Acton, Jordan	9	No		✓	
Adams, Adam	8	No		✓	
Adams, George	9	No		✓	
Adrianson, Robert	11	No		✓	
Affelay, Brian	11	No		✓	

The total number of records returned is listed at the bottom of the page. The totals are adjusted as the bulk edits are made.

Total	158	158	0	158

TIP: This functionality can also be useful for finding records with missing information. For example, to find records where *Ethnicity* is missing, select **Ethnicity** as the **Group Type**, **<None>** as the **Group** and **Ethnicity** as the **Data Item**. The missing information can then be entered.

Bulk Editing the Data

1. Right-click the heading of a data entry column (white background) and select **Check All** to populate the column with ticks. Alternatively, select **Uncheck All** to remove all the ticks from the column. The **Assigned** column displays the selected choice.

Name	Year Group	Assigned	Yes	No
Abbot, Hannah	8	No		
Adams, Melanie	8	No		
Adkins, Richard	8	No		
Ainsworth, Alison	8	No		✓
Andrews, Bethany	8	No		✓
Aperen, Alex	8	No		✓
Ashworth, Imogen	8	No		✓
Atkinson, Bridget	8	No		✓
Austin, Shannon	8	No		✓

2. Click in the cell of a specific pupil/student to change an individual value as shown in the following graphic:

Name	Year Group	Assigned	Yes	No
Abbot, Hannah	8	Yes	✓	
Adams, Melanie	8	Yes	✓	
Adkins, Richard	8	No		✓
Ainsworth, Alison	8	Yes	✓	
Andrews, Bethany	8	No		✓
Aperen, Alex	8	Yes	✓	
Ashworth, Imogen	8	Yes	✓	
Atkinson, Bridget	8	Yes	✓	
Austin, Shannon	8	Yes	✓	

3. If required, undo any changes by clicking the **Undo** button – this returns the data to its original state.
4. Once you have made all the required changes, click the **Save** button to bulk update the records.

Click the **Print** button to export the list to Microsoft® Excel.

TIPS: Right-click the heading of a data entry column (white background) and select **Narrow Columns** to reduce the width of the columns.

Right-click the heading of any read-only column (grey background) and select any additional columns to be displayed from the pop-up menu, such as **Date of Birth, Ad No., Gender**, etc.

Single-click any column heading to order the data by that column.

Assign values to multiple pupil/students within the group using any of the following methods. Hold down the **Ctrl** key and click the row of each required pupil/student to highlight them. Release the **Ctrl** key, and then click in the required column to add a tick to the selected pupil/student. To enter values for sequentially listed pupil/students, single-click the first pupil/student, hold down the **Shift** key, then single-click the last required pupil/student in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key). Release the **Shift** key then click in the required column to add a tick to the selected pupil/students.

08 | Editing Historical Pupil/Student Information

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Introduction

There may be occasions when you need to edit historical information recorded against a specific pupil/student. For example, a pupil/student may have changed registration groups before it has been possible to record the change within SIMS.

If the change is made in the **Registration** panel, then the registration group membership is changed as from today. It is therefore necessary to edit the historical data for that pupil/student so that it can be seen exactly when their membership of the new registration group began.

It is currently possible to:

- view any pupil/student name changes.
- view any changes of address.
- view/edit all aspects of pupil/student registration.
- view/edit ethnic/cultural data such as ethnicity, ethnic data source, etc.

Historical data is edited from the pupil/student record which is accessed as follows:

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Pupil (or Student)** browser.

The screenshot shows the 'Find Student' window with the following search filters: Surname, Forename, Admission Number, Status (Current), Tier (<Any>), Year Group (<Any>), Reg Group (<Any>), and House (<Any>). The results table is as follows:

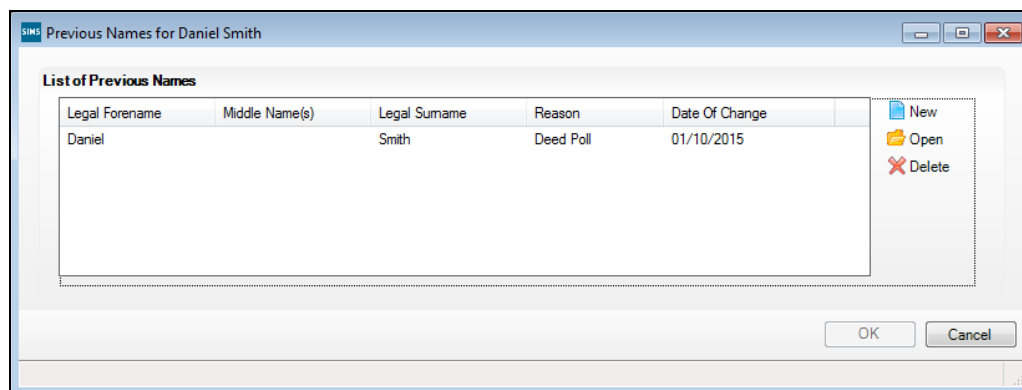
Name	Year Group	Reg. Group	House	Gender	Admission Number
Abbess, Graham	8	8A	Boyle	Male	004504
Abbey, Grenetta	11	11F	Hooke	Female	003979
Abbey, Jimmy	13	G	Curie	Male	003599
Abbey, Sean	8	8B	Boyle	Male	004505
Abbot, Andrew	10	10E	Fleming	Male	004163
Abbot, Ben	11	11A	Newton	Male	004161
Abbot, Susan	12	I	Hooke	Female	003600

2. Search for and then select the required pupil/student. The **Pupil (or Student) Details** page is displayed.

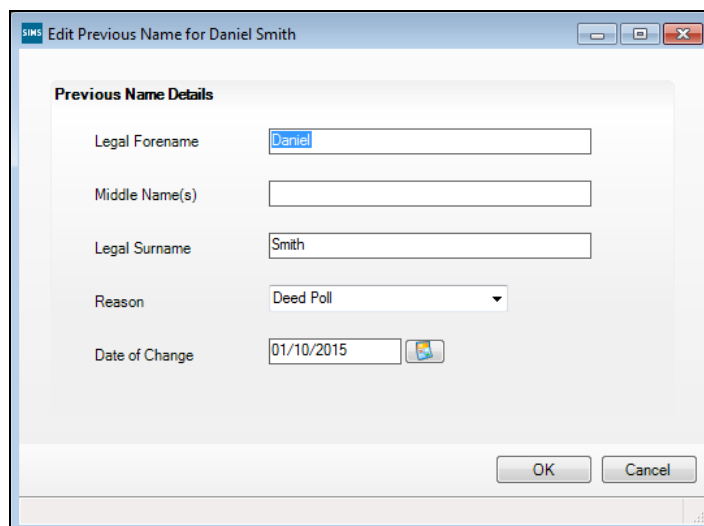
Viewing /Editing Name Changes

Whenever a change is made to a pupil/student's surname or forename, it is automatically recorded as historical data. It is possible to view or edit this information, and to also manually enter any name changes that may, for example, have occurred before the pupil/student joined your school.

1. Click the **Basic Details** hyperlink to display the **Basic Details** panel.
2. Click the **History** button to display the **Previous Names for [Name]** dialog.



3. Any existing name changes are shown. To view or edit the details, highlight the name, then click the **Open** button to display the **Edit Previous Name for [Name]** dialog.

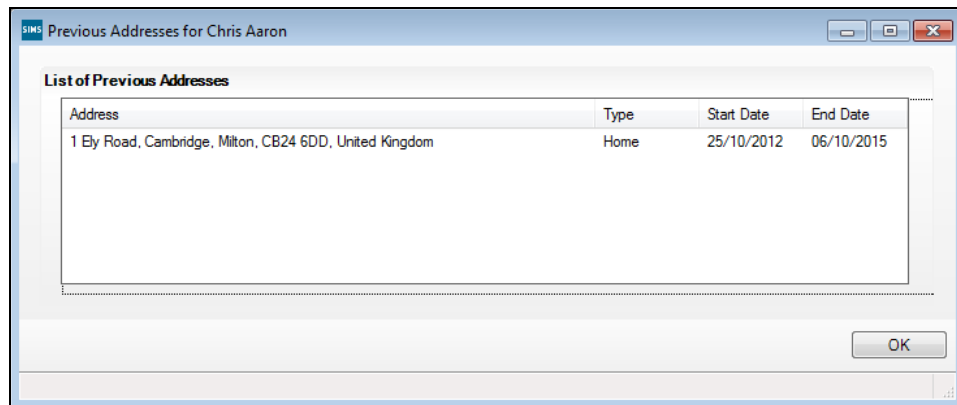


4. Make any required changes and select the **Reason** for the change from the drop-down list, e.g. **Deed Poll**.
5. The **Date of Change** defaults to today's date and should be changed by clicking the **Calendar** button and selecting the required date.
6. Click the **OK** button twice then click the **Save** button on the toolbar to save any name changes.

Viewing Changes of Address

Any changes made to a pupil/student's address are automatically recorded in their history and can be viewed as follows:

1. Click the **Addresses** hyperlink to display the **Addresses** panel.
2. Click the **History** button to display the **Preview Addresses for [Name]** dialog.



3. Click the **OK** button to close the dialog.

Viewing /Editing Historical Registration Data

Once pupil/students have been admitted into the school, they generally remain in the same Year Group and Registration Groups/Classes for the entire academic year.

There may be occasions when this is not practical and some pupil/students may need to be allocated to different Year Groups and Registration Groups/Classes part way through the academic year. Sometimes, behaviour issues may cause friction in a registration group and the easiest way to manage this would be to move one of the misbehaving pupil/students away from other troublemakers.

To enable Pastoral Managers to deal with these occasions, the ability to allocate pupil/students retrospectively to other Year Groups and Registration Groups/Classes has been provided. Select the **Registration Group Scheme Name** from the **History Details** dialog.

1. Click the **Registration** hyperlink to display the **Registration** panel.

- Click the **History** button to display the **History Details** dialog.

Selecting the Academic Year and Effective Date Range

- The **Effective Date Range** defaults to today's date to the end of the current academic year. Change the date range by clicking the adjacent **Browser** button to display the **Select Effective Date Range** dialog. The date range should be the date that you want to apply any change to.
- If required, select a different **Academic Year** from the drop-down list. The **Effective Date Range** defaults to the dates for that academic year.

- Select the required radio button. If the **Custom dates** radio button is selected, you need to enter **From** and **To** dates or click the **Calendar** button and select the required dates. Click the **OK** button to confirm your selection.

Viewing Registration Data

Beneath the **Effective Date Range** field there are two additional fields entitled **Cursor Day** and **Cursor Date**. The data displayed in these fields display the day and date highlighted as the cursor is moved backward and forward along the calendar. This can be useful when information in the screen changes, e.g. a change in registration group, and you want to see the exact date that this change was made.

NOTE: The effective date is shown with a green vertical line indicating the start and a red vertical line indicating the end.

If required, click the **Zoom** button to increase the size of the months displayed in the grid.

The screenshot shows a software interface for viewing registration data. At the top, there are three buttons: 'Zoom' (with a magnifying glass icon), 'Details' (with a list icon), and 'Action...' (with a gear icon). Below these is a table with the following fields:

Scheme Name	Sep
Year Groups	5
Class in Year 5	5DT
Years Taught In	5
Houses	
Boarder	<Day
Attendance Mode	<All day

At the bottom of the table, there is a small calendar grid showing the months of September and October. A green vertical line is visible in the calendar, indicating the effective date range.

The **Scheme Name** column lists the various groups of data that can be viewed or edited. These include:

- Year Groups
- Class/Reg Group in Year
- Years Taught In
- Houses
- Boarder
- Attendance Mode

Clicking each row, e.g. **Year Group** displays relevant information in the **Selected Scheme** and **Selected Year Groups** fields as shown in the following graphic:

The screenshot shows the 'History' tab of the registration data interface. At the top, there are several fields and buttons:

- Effective Date Range:** 07/10/2015 - 31/08/2016 (with a magnifying glass icon)
- Academic Year:** Academic Year 2015/2016 (dropdown menu)
- Cursor Day:** Wednesday
- Cursor Date:** 07/10/2015
- Selected Scheme:** Year Groups
- Selected Year Groups:** <None>

Below these fields are the same three buttons as in the previous screenshot: 'Zoom', 'Details', and 'Action...'. Below the buttons is a table with the following fields:

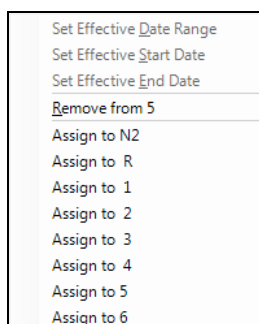
Scheme Name	Sep
Year Groups	5

At the bottom of the table, there is a small calendar grid showing the months of September and October. A green vertical line is visible in the calendar, indicating the effective date range.

Editing Registration Data

The method of editing each 'scheme' is the same. The following example describes how to edit a pupil/student's Year Taught In.

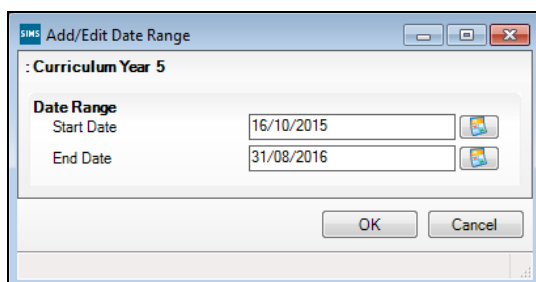
1. Ensure that the required academic year and effective date have been selected (please see *Selecting the Academic Year and Effective Date Range* on page 258).
2. Select **Years Taught In** in the **Scheme Name** column.
3. Click the **Action** button to view a drop-down list of options.



4. Click the required **Curriculum Year** heading in the **Years Taught In** column (using the scroll bars if necessary), then click the **New** button to make the change.

Years Taught In	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Curriculum Year N2												
Curriculum Year N												
Curriculum Year R												
Curriculum Year 1												
Curriculum Year 2												
Curriculum Year 3												
Curriculum Year 4												
Curriculum Year 5												
Curriculum Year 6												

- Alternatively, double click the new **Curriculum Year** bar to display the **Add/Edit Date Range** dialog. Edit the dates if required.



- If you have made a mistake, highlight the required orange block and click the **Delete** button.
- Click the **OK** button to confirm any changes then click the **Save** button on the toolbar to save the pupil/student record.

Editing Historical Ethnic/Cultural Information

Editing ethnic/cultural historical data can be useful if you have inaccurately recorded a pupil/student's ethnicity, for example, and wish to correct it back to when the information was first entered. The following information can be edited:

- Ethnicity
 - Ethnic Data Source (except Northern Ireland)
 - Religion
 - Home Language
 - Mother Tongue (except Northern Ireland)
 - English as an Additional Language
- Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

- Click the **History** button to display the **History Details** dialog.

SIMS History Details:

History

Effective Date Range: 07/10/2015 - 31/08/2016 Academic Year: Academic Year 2015/2016

Cursor Day: Selected Item: Ethnicity

Cursor Date: Selected Ethnicity: <None>

☒ Zoom ☒ Details ☒ Action...

Item	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Ethnicity	White - English											
Ethnic Data Source	Provided by the parent											
Religion	Christian											
Home Language	English											
First Language	English											
First Language Source												
English as an Additional Language	No											

OK Cancel

- Ensure that the required academic year and effective date have been selected (please see *Selecting the Academic Year and Effective Date Range* on page 258).
- Select **Ethnicity** in the **Scheme Name** column.
- Click the **Details** button to display the **Ethnicity** dialog. If necessary, scroll down to identify the current ethnicity. Alternatively, click the **Action** button to view a drop-down list of options including the ethnicities that can be selected.

SIMS Ethnicity

Cultural Details

Effective Date Range: 07/10/2015 - 31/08/2016 Academic Year: Academic Year 2015/2016

Cursor Day: Tuesday Selected Scheme: Other Gypsy/Roma

Cursor Date: 01/09/2015 Selected Membership: <None>

☐ New ☒ Open ☒ Delete ☒ Zoom

Ethnicity	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Greek												
Greek Cypriot												
White European												
White Western European												
White - English	White - English											
White Eastern European												
Croatian												
Bosnian-Herzegovinian												
Albanian												
Refused												

OK Cancel

6. Click the required Ethnicity heading in the **Ethnicity** column (using the scroll bars if necessary), then click the **New** button to make the change.

Ethnicity	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Greek												
Greek Cypriot												
White European												
White Western European												
White - English												
White Eastern European												
Croatian												
Bosnian-Herzegovinian												
Albanian												
Refused												

7. Alternatively, double click the orange bar to display the **Add/Edit Date Range** dialog. Edit the dates as required.

8. If you have made a mistake, highlight the required orange block and click the **Delete** button.
9. Click the **OK** button to confirm any changes then click the **Save** button on the toolbar to save the pupil/student record.

09 | Managing Applications to your School

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Introduction

This section describes how to record and manage any applications to your school. Once an applicant has been added to SIMS, the application can be changed according to its status (including **Applied**, **Offered**, **Accepted**, **Admitted**, **Rejected** or **Withdrawn**) as applicable. The status can be changed for individual applicants or applied in bulk.

Before using the admissions process, it is important to set up admissions parameters and create admission groups into which applicants can be added. This enables the status of applications to be changed in bulk.



Additional Resources:

Setting Up and Administering SIMS handbook

Recording a New Applicant

There are several ways in which an applicant can be added to SIMS:

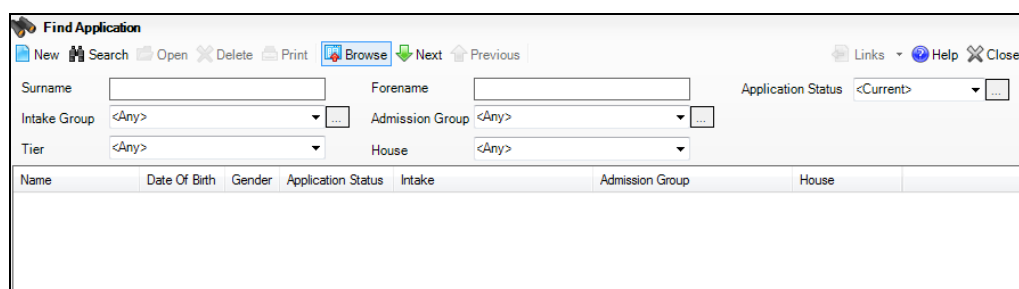
- Manual entry via the keyboard.
- Importing via CTF (although some details will usually have been entered into SIMS before the CTF is imported).
- Importing an application XML file, if applicable.

This section describes how to manually enter an applicant into SIMS together with the completion of their mandatory information.

1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.

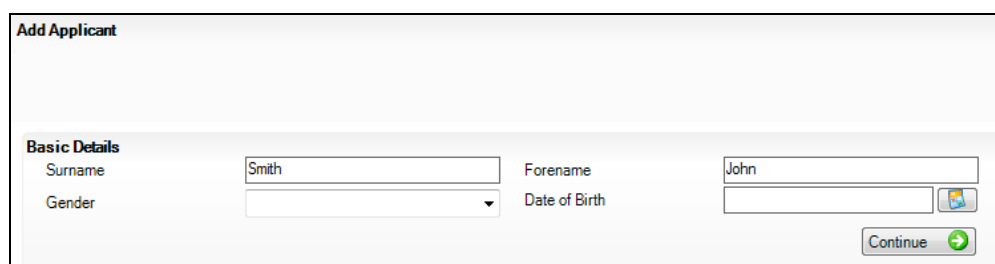


Application icon



The 'Find Application' window features a toolbar with buttons for New, Search, Open, Delete, Print, Browse, Next, and Previous. It includes search filters for Surname, Forename, Intake Group, Admission Group, Tier, and House, each with a dropdown menu. An 'Application Status' dropdown is set to '<Current>'. Below the filters is a table with columns: Name, Date Of Birth, Gender, Application Status, Intake, Admission Group, and House. The table is currently empty.

- Click the **New** button to display the **Add Applicant** page with the **Basic Details** panel displayed. This panel is used to enter basic information to check that the applicant does not already exist in SIMS.

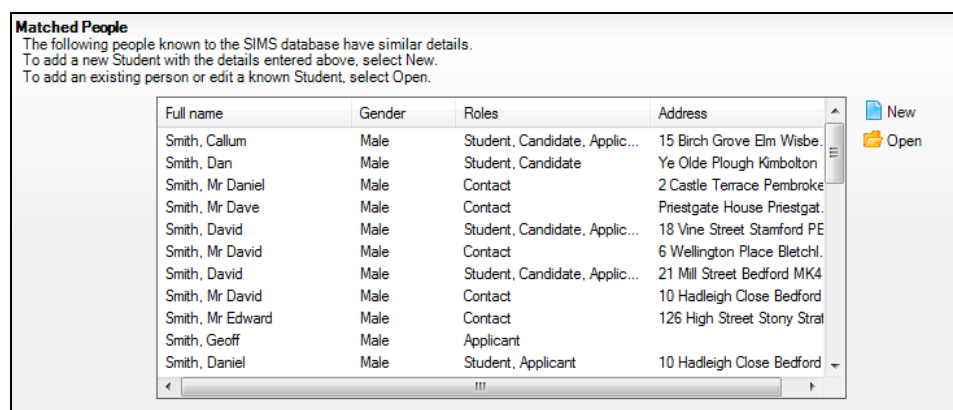


The 'Add Applicant' window shows the 'Basic Details' panel. It contains input fields for Surname (Smith), Forename (John), Gender (a dropdown menu), and Date of Birth (with a calendar icon). A 'Continue' button with a green arrow is at the bottom right.

- Enter any combination of the **Surname** (mandatory), **Forename** and **Date of Birth** and/or select the **Gender** from the drop-down list and then click the **Continue** button.

NOTE: It is important to ensure that surnames and forenames are spelt correctly at this point to ensure that any matching existing records are identified thus avoiding duplicates being created. If you are unsure, enter partial Surnames/Forenames as required.

- If no existing applicants are found, the remainder of the **Application** page is populated with the details just entered. Mandatory fields are highlighted in red. Complete the basic details (please see *Completing Basic Details* on page 267).
- If the applicant details are similar to an existing person in SIMS, a **Matched People** panel is displayed showing the possible matches.



The 'Matched People' window displays a list of people with similar details. It includes instructions: 'The following people known to the SIMS database have similar details. To add a new Student with the details entered above, select New. To add an existing person or edit a known Student, select Open.' The list has columns for Full name, Gender, Roles, and Address.

Full name	Gender	Roles	Address
Smith, Callum	Male	Student, Candidate, Applic...	15 Birch Grove Elm Wisbe.
Smith, Dan	Male	Student, Candidate	Ye Olde Plough Kimbolton
Smith, Mr Daniel	Male	Contact	2 Castle Terrace Pembroke
Smith, Mr Dave	Male	Contact	Priestgate House Priestgat.
Smith, David	Male	Student, Candidate, Applic...	18 Vine Street Stamford PE
Smith, Mr David	Male	Contact	6 Wellington Place Bletchl.
Smith, David	Male	Student, Candidate, Applic...	21 Mill Street Bedford MK4
Smith, Mr David	Male	Contact	10 Hadleigh Close Bedford
Smith, Mr Edward	Male	Contact	126 High Street Stony Strat
Smith, Geoff	Male	Applicant	
Smith, Daniel	Male	Student, Applicant	10 Hadleigh Close Bedford

Buttons for 'New' and 'Open' are on the right.

NOTE: The **Matched People** panel displays a list of all **people** in the system which includes staff, contacts, agents, etc. If you think the applicant already exists, check that the **Role** is **Student, Applicant**. The sort order of the display can be changed by clicking the required column heading.

- If the applicant does not appear in the list, click the **New** button to create a new record populated with the search information previously entered. Complete the basic details (please see *Completing Basic Details* on page 267).
- If the required applicant appears in the list, highlight their name and click the **Open** button to edit their details.

Completing Basic Details

Once a new record has been created, the **Basic Details** panel is populated with the search information entered in the previous step. Any incomplete mandatory fields are displayed in red.

1 Basic Details

Legal Forename: John

Middle Name(s):

Legal Surname: Smith

Preferred Surname: Smith

Preferred Forename:

Date of Birth: [Red bar]

Current Age:

Gender: [Red bar]

Birth Certificate Seen: ☐

Former UPN: [Red bar]

UPN: [Red bar]

Quick Note:

Photograph: Click for photographers

History

1. Complete any remaining name fields such as **Middle Name(s)**.
2. Enter the **Date of Birth** (mandatory) if not already completed or click the **Calendar** button and select the required date. The **Current Age** is calculated automatically as the date of birth is entered.



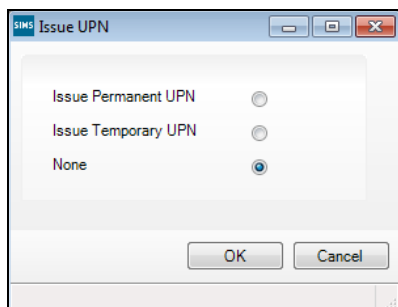
Calendar button

3. Select the **Gender** from the drop-down list if not already completed.
4. Select the **Birth Certificate Seen** check box if applicable.
5. Enter the UPN in the **UPN** field if known. If required, a UPN can be issued by clicking the **Generate UPN** button.



Generate UPN button

The **Issue UPN** dialog is displayed. Select the applicable radio button, then click the **OK** button (the UPN is generated when the record is saved).



Issue Permanent – Permanent UPNs are issued to an applicant only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.

Issue Temporary – Temporary UPNs are issued to applicants only when a school does not know the permanent UPN (e.g. awaiting transfer file/applicant's information).

Recording a Quick Note

There may be occasions when you wish to add an important note that appears in the **Basic Details** panel. This ensures that any user (who has applicable permissions) accessing the pupil/student's record, sees the note.

Quick Note	Need to confirm middle name.

Enter the required text in the **Quick Note** field.

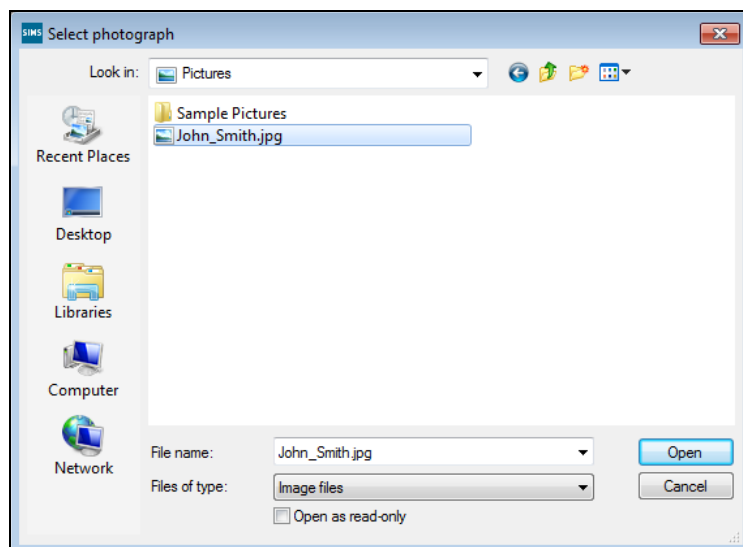
Attaching a Photograph

1. If you have an electronic copy of the applicant's photo, this can be attached to the record by clicking the **File Browser** button to the right of the **Photograph** field.



File Browser button

The **Select Photograph** dialog is displayed.



2. Navigate to and select the required photograph, then click the **Open** button. The selected photograph is displayed in the **Basic Details** panel as shown in the following example.

Adding /Editing Previous Names

It is possible to add or edit an applicant's previous names (please see *Correcting/Removing a Pupil/Student's Previous Name* on page 173).

Completing Registration Information

1. Click the **Registration** hyperlink to display the **Registration** panel. Red fields indicate mandatory information.

2. The **Application Status** defaults to **Applied**. Amend the status if required, e.g. to **Offered**.
3. The **Application Reference Number** is only applicable to English Own Admission Authority schools and Independent schools.

In English Own Admission Authority schools, an ARN is given to applicants imported via ATF or ADT files; this field is read-only.

Independent schools can record and edit the **Application Reference Number** (ARN) of the prospective student. If the ARN already exists in the system, the following warning message will be displayed on the Status Bar.

 Application Reference Number already exists for person Abbot, Dennis

4. Select the **Intake Group** (mandatory) and the **Admission Group** into which the applicant will be placed, from the appropriate drop-down lists. The **Year Group**, **Date of Admission** and **Age On Entry** are automatically populated based on the information recorded for the selected intake/admission group.
5. Select the **Year Taught In** from the drop-down list.
6. If known at this stage, select the **Class** and **House** (if applicable) into which the applicant will be admitted.
7. The **Enrolment Status** defaults to **Single Registration**, but can be changed by selecting any of the following values from the drop-down list:
 - **Single Registration**- a normal, full-time pupil/student who is registered only at your school.
 - **Guest Pupil**- a pupil/student who attends your school for some of their lessons, but predominantly attends their main school. Guest pupil/students are not registered at your school and do not have an admission number.
 - **Main-Dual Registration**- a pupil/student who is also registered at another school for some of their timetable, but the majority of their time is spent at your school.

- **Subsidiary-Dual Registration-** a pupil/student who is also registered at another school for the majority of their timetable and only a minority of their time is spent at your school.
8. Select the **Boarder Status** (if applicable) e.g. **Not a Boarder** or **Boarder, night not specified** from the drop-down list.
 9. If this is a late application, select the **Late Application** check box. This allows Own Admissions Authority schools with a full licence to identify late applications and if they wish, omit late applications when recording data for an ASL file.
 10. Select the **Tier 4 Application** check box if you wish to mark this record as such. For this check box to be visible, the functionality must be enabled via **Tools | Admission | Defaults**. Once selected, Tier 4 Application records are indicated in the **Find Application** browser.

IMPORTANT NOTE: When creating an application for a prospective student that is linked to an agency, or contact (e.g. parent) (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the recorded tier 4 application information is transferred automatically from agency's record to application's record.

11. Complete the **Local UPN** of the prospective pupil/student.

IMPORTANT NOTE: When adding a **Local UPN** to an application record (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the **Local UPN** is transferred to the pupil/student's main record on the date they are actually admitted to the school.

12. If the applicant will be attending school on a part time basis, select the **Part-Time** check box.

☒ Part-Time		
Start Date	01/09/2017	
End Date	30/08/2018	

13. The **Start Date** must be entered and **End Date** can be completed if known.

NOTE: Part-time attendance is usually only applicable to nursery school children, but is permitted for all ages and is considered to be anything less than 10 sessions per week. It refers to part-time in education, not part-time in one or more establishments.

2 Registration Details			
Application Status	Applied	Application Reference Number	
Intake Group	2015/2016 - Autumn L6	Admission Group	2015/2016 - Autumn L6 (A)
Year Group	Lower Sixth	Year Taught In	Curriculum Year 12
Registration Group	2 JB	House	
Date Of Admission	01/09/2015	Age On Entry	
Admission Number		Enrolment Status	Single Registration
Boarder Status		Late Application	☐
Unique Learner Number		Tier 4 Application	☐
Local UPN			
☐ Part-Time			
Start Date			
End Date			

Setting up the Early Years Attendance Patterns for an Applicant

Applicable to English Primary schools or Independent schools with a Nursery provision

Parents are now entitled to receive 15 hours of free nursery provision per week, which can be taken over a minimum of three days. They can choose to take as much or as little of the 15 hours as they like, and use their entitlement at more than one nursery provider.

An Early Years Attendance Pattern can be defined for applicants (regardless of their status, e.g. **Applied**, **Offered**, etc.). However, the attendance pattern only becomes effective when the applicant is admitted. The effective date (**Start Date**) for the attendance pattern is automatically assigned as the pupil's date of arrival.

This routine enables your school to set up an early years attendance pattern for any applicant but typically two, three and four year olds. Defining a weekly attendance pattern for a pupil does not have any impact on the recording of attendance. It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and PM, that the provisions defined in the attendance patterns).



Additional Resources:

Managing Pupil/Student Attendance handbook

The periods of nursery care provision that are available to parents, e.g. Mornings Only Nursery Care, must have previously been defined via **Tools | Setups | Attendance Setup | Early Years Provisions Setup**.



Additional Resources:

Managing Pupil/Student Attendance handbook

1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.



Application icon

2. Search for, then open the required applicant's record to display the **Application:** page.
3. Click the **Registration Details** hyperlink to display the **Registration Details** panel.

2 Registration Details

Application Status	Applied	Application Reference Number	
Intake Group	2015/2016 - Autumn Mid Year	Admission Group	2015/2016 - Autumn Mid Year (A)
Year Group	Year 1	Year Taught In	Curriculum Year 1
Class	ELM	House	
Date Of Admission	02/11/2015	Age On Entry	5 years
Admission Number		Enrolment Status	Single Registration
Boarder Status	Not a Boarder	Late Application	☐
Local UPN		Tier 4 Application	☐
☐ Part-Time			
Start Date			
End Date			

Early Years Attendance Patterns

Monday Provision Type	
Tuesday Provision Type	
Wednesday Provision Type	
Thursday Provision Type	
Friday Provision Type	

Subject Choices

Order	Subject	Comment

4. Specify the **Early Years Attendance Patterns** by selecting the required provision type for each day of your school's working week from the drop-down list. For example, **Morning Only** (a.m. nursery care) Monday to Friday with the exception of Wednesdays when **Afternoon Only** (p.m. nursery care) is provided.

Early Years Attendance Patterns

Monday Provision Type	Morning Only
Tuesday Provision Type	Morning Only
Wednesday Provision Type	Afternoon Only
Thursday Provision Type	Morning Only
Friday Provision Type	Morning Only
Saturday Provision Type	

5. Click the **Save** button to retain the Early Years Attendance Pattern for that pupil.

It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and PM, that the provisions defined in the attendance patterns).



Additional Resources:

Managing Pupil/Student Attendance handbook

Adding /Editing Subject Choices

You can view the **Subject Choices** table, if you select the respective check box on the **Setup Details** page (via **Tools | Admissions | Defaults**).

1. Click the **New** button adjacent to the **Subject Choices** table to display the **Add/Edit Applicant Subject Choices** dialog.
2. The **Ranking** determines the order in which the subjects will be displayed in the Subject Choices table.
3. Select the **Subject Choice** from the drop-down list.
4. Click the button adjacent to the **Subject Choice** drop-down list to display both active and inactive subject choices. Inactive subject choices are displayed in the **Unusual Value Text Colour**, as defined on **Customisation Options** page (via **Tools | Setups | User Options**).
5. Add any relevant **Comment**.
6. Click the **OK** button to return to the **Application** page.

Recording Tier 4 Application Information

The Tier 4 functionality, which handles applications from international pupil/students, is enabled via the **Setup Details** page (**Tools | Admissions | Defaults**). Once enabled, a Tier 4 Application record can be created. A **CAS Reference** (Confirmation of Acceptance for Studies) can also be recorded. If this functionality is not enabled, it is not possible to record this information.

An application's **CAS Reference** can be recorded in SIMS, to comply with the UK Border Agency's traceability requirement to link a CAS Reference with a VISA number. Once entered, this information is also available from the **Links** panel on the **Pupil (or Student) Details** page (via **Focus | Pupil (or Student) | Pupil (or Student) Details**), from where it can be edited.

Only schools that accept international pupil/students (requiring a VISA) need to manage these applications.

1. Click the **Tier 4 Details** link in the **Links** panel on the right-hand side of the page to display the **Tier 4 Details** page.

1 Basic Details

Name
Rosanna Amoso

Nationality
Italy

Country of Birth
Italy

Notes

Region
EEA

Place of Birth
Rome

Passport Seen
☒

Passport/ID Scanned
☐

2 Immigration History

Visa Type	Issue Date	Expiry Date	Visa Status	CAS Assignment	CAS Reference
Tier 4 child	01/02/2017		Granted		

New
Delete

Selected Visa Details

Visa Type
Tier 4 child

Visa Status
Granted

Visa Issue Date
01/02/2017

Police Registration Required
☐

Police Registration Date

Entry Date

2. The pupil/student's **Name**, **Nationality** and **Country of Birth** are populated automatically and cannot be amended.
3. Select the **Region** of the country of birth (e.g. **EEA** for Italy or **International** for China) from the drop-down list and enter the **Place of Birth**.
4. If applicable, select the **Passport Seen** and **Passport / ID Scanned** check boxes and enter any **Notes**.
5. In the **Immigration History** panel, click the **New** button to create a new Visa record. Alternatively, select an existing record to view its details in the **Selected Visa Details** and **Selected CAS Details** panels. Click the **Delete** button to delete a record.
6. Enter the **Visa Type** (mandatory) and any other Visa and CAS information in the relevant fields. Select the **Police Registration Required** and **BRP/Visa Seen** check boxes, if applicable.

7. Schools are required to report any changes in the situation of a Tier 4 pupil/student (e.g. a Visa change or a new course) to the Home Office. These changes can be recorded in the **Home Office Reporting** panel. Click the **New** button to create a new report. Alternatively, select a report to view or edit its details in the **Selected Report Details** panel. A report can be deleted by highlighting it and clicking the **Delete** button.

Date	Category	Reason	Evidence
06/01/2017	Change in circumstances	Sponsor withdrawn	New visa/application
25/11/2016	Student is delayed	Not enrolled	New offer letter

Selected Report Details

Date: 06/01/2017

Category: Change in circumstances

Reason: Sponsor withdrawn

Evidence: New visa/application

Notes:

8. Select the **Date** of the change from the Calendar.
9. Select the type of change in situation from the **Category** drop-down list (e.g. **Change in circumstances**) and the **Reason** for the change (e.g. **Student withdrawn**).
10. Select any **Evidence** of the changes (e.g. **New offer letter**) and enter any relevant **Notes**.
11. Click the **Save** button.



Additional Resources:

Setting up Admissions in the *Getting Started with Admissions* 7 chapter of the *SIMS Admissions Code of Practice Own Admissions Authority Basic Licence* handbook, the *SIMS Admissions Code of Practice Own Admissions Authority Full Licence* handbook and the *SIMS Admissions for Independent Schools* handbook



More Information:

Completing Registration Information on page 270

Recording Applicant Visit Details

Internal visits represent the entry into school of applicants and/or their parent/guardians. They can be added or edited from within the **Application** page, which is useful for setting up interviews for a single applicant pupil or for a group of applicants. Applicants can be associated with an existing visit or a new visit record can be created from the application record.

1. On the **Application** page, click the **Visits** hyperlink to display the **Visits** panel.

15 Visits

Type	Date	Time	Location	

 New
 Open
 Delete
 Add

- It is possible to record details of a visit that an applicant intends to make to your school. To add a record for a visit and associate the selected applicant with it, click the **New** button, then add the required details.

It is also possible to associate the selected prospective pupil/student with an existing, scheduled interview or visit. To do this:

- Click the **Add** button to display the **Visits-Applicants / Others** dialog.

TIP: To help distinguish between adding prospective pupils to a new visit and adding them to an existing visit record, hover over the **New** and **Add** buttons in the **Visits** panel.

Internal Visit Browse

Search

Open

Browse

Next

Previous

Links

Help

Close

Visit Details

Visit Type

Open Day

Visit Location

<None>

Visit Date

20/11/2017

Visit Time

00:00:00

All Day Event

☒

Prospective Pupils/Applicants

Surname	Forename	Application Status	Comment
Allen	Simon	Applied	

Other Visitors

	Surname	Forename	Role	Comment
☒	Allen	Jonathan	Contact, Enquirer	

Save

Cancel

- Using the **Internal Visit** browser, select the required search criteria, then click the **Search** button to display all visits recorded in SIMS that match the search criteria selected. Alternatively, leave the search criteria blank, then click the **Search** button to display details of all recorded visits.
- Double-click the required visit to display its details. Details of the visit are displayed in read-only format in the **Visit Details** panel.

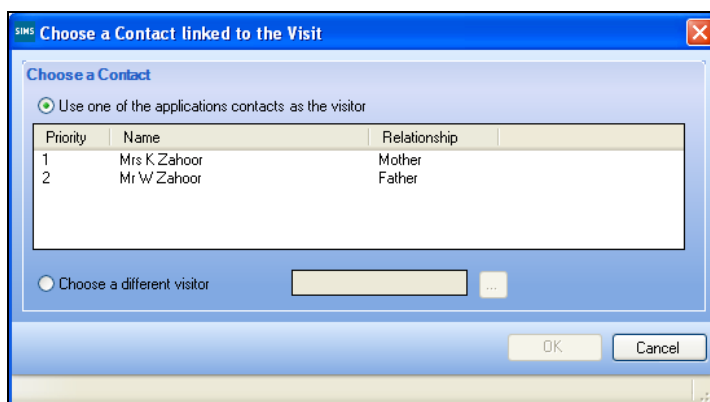
The selected **Prospective Pupils/Applicants** (the applicant) is added to the visit automatically and cannot be removed. Any **Other Visitors** (i.e. contacts of the applicant) are also displayed. Deselect any **Other Visitors** who will not be attending the visit by deselecting their check box.

6. Click the **Save** button to save the details and return to the **Application** page.
7. The applicant can be disassociated from the visit by highlighting the event in the **Visits** panel, then clicking the **Delete** button. Click the **Yes** button to confirm. If the applicant is the only person associated with this visit and you remove them from the event, you will be asked if you wish to delete the entire visit record.

Recording Details of a New Visit

Applicants can be associated with a new visit record, created from the **Application** page.

1. On the **Application** page, click the **Visits** hyperlink to display the **Visits** panel.
2. Click the **New** button to display the **Choose a Contact linked to the Visit** dialog.



3. If the applicant contact you wish to add to the visit is displayed in the **Choose a Contact** panel, select the **Use one of the applications contacts as the visitor** radio button, highlight the required contact, then click the **OK** button to display the **Add/Edit Visits** dialog. Proceed to Step 4.

If the applicant contact you wish to add to the visit is not displayed in the **Choose a Contact** panel, or you wish to select a different contact, select the **Choose a different visitor** radio button, then click the **Browser** button to display the **Select person** browser.

- a. From the **People** browser, enter the required search parameters, then click the **Search** button to find the required person.
- b. Highlight the required person, then click the **OK** button to return to the **Choose a Contact linked to the Visit** dialog, where the contact's name is displayed adjacent to the **Choose a different visitor** field.

- c. Click the **OK** button to display the **Add/Edit Visits** dialog.

1 Visit Details

Visit Type: Open Evening

Visit Date: 21/11/2017

Visit Time: 18:30

Visit Location: <None>

All Day Event: ☐

4. In the **Visit Details** panel, select the **Visit Type** from the drop-down list.
5. The **Visit Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting a different date.
6. Enter the **Visit Time** and select the **All Day Event** check box, if applicable.
7. To select the location for the visit, click the **Search** button adjacent to the **Visit Location** field to display the **Browse Internal Location** dialog.
 - a. Click the **New** button and select a **Room** from the drop-down list. All existing rooms that have been defined through **Focus | School | Rooms** are displayed. The **Description** field is populated automatically.
 - b. Click the **Save** button, then click the **OK** button to return to the **Add/Edit Visits** dialog.

Adding Staff Representatives

2 Staff Representatives

Surname	Forename	Task	Main
Abell	Anita	Speaker	True

Buttons: New, Open, Delete

Visit Date: 21/11/2017

The **Staff Representatives** panel is used to add the members of staff you wish to attend the event.

1. In the **Staff Representatives** panel, click the **New** button to display the **Staff Representative** dialog.
2. Click the **Search** button to display the **Browse Staff Representatives** dialog.
3. Enter the staff member's **Surname**, **Forename**, **Previous Name** and/or their **Staff Code**. Alternatively, select their **Title**, **Gender**, **Status** or **Tier** from the drop-down lists.
4. Click the **Search** button to display staff members who match the search criteria entered.
5. Highlight the required member of staff, then click the **OK** button to return to the **Staff Representative** dialog, where the **Staff Member** field is populated.

6. Select the staff member's **Visit Task** from the drop-down list. This determines their role during the visit. The options available are **Interviewer**, **Guide** and **Speaker**. With the appropriate permissions, you can create specific values for this lookup through **Tools | Lookups | Maintain**. For more information, please refer to the *User Defined Groups/Fields, Lookups and Ethnic Codes* chapter in the *Setting up and Administering SIMS* handbook.
7. Click the **OK** button to return to the **Internal Visit Detail** dialog.
8. Repeat steps 1 to 7 to add staff representatives until they are all recorded.
9. Click the **Save** button to save the details.

Adding Student Representatives

Surname	Forename	Year Group	Reg Group	Task	Main
Young	Roberta	U6	G	Guide	True

Visit Date: 21/11/2017

The **Student Representatives** panel is used to add the pupil/students you wish to attend the event.

1. In the **Student Representatives** panel, click the **New** button to display the **Student Representative** dialog.
2. Click the **Search** button to display the **Browse Student Representatives** dialog.
3. Enter the pupil/student's **Surname**, **Forename** or and/or **Admission Number**. Alternatively, select their **Tier**, **Year Group**, **Reg Group** or **House** from the drop-down lists.
4. Click the **Search** button to display student representatives who match the search criteria entered.
5. Highlight the required pupil/student's name, then click the **OK** button to return to the **Student Representative** dialog, where the **Student**, **Year Group** and **Reg Group** fields are populated.
6. Select the student representative's **Visit Task** from the drop-down list. This determines their role during the visit. The options available are **Interviewer**, **Guide** and **Speaker**.
7. Click the **OK** button to return to the **Internal Visit Detail** dialog.
8. Repeat steps 1 to 7 to add student representatives until they are all recorded.
9. Click the **Save** button to save the details.

Adding Prospective Pupils/Applicants

Surname	Forename	Application Status	Comment
Zahoor	Rita	Applied	

The **Prospective Pupils/Applicants** panel is used to add the prospective pupil/students or applicants you wish to attend the event.

In the **Prospective Pupils/Applicants** panel, click the **New** button, then select either **Prospective Pupil** or **Applicant** to display the **Browse Prospective Pupils** or **Browse Applicants** dialog respectively.

To add a Prospective Pupil:

1. Enter their **Surname** and **Forename**, then select their **Year of Entry** and **Year Group** from the drop-down lists.
2. Click the **Search** button to display all prospective pupils who match the search criteria entered and selected.
3. Highlight their name, then click the **OK** button to populate the **Prospective Pupils/Applicants** panel on the **Internal Visit Detail** dialog. To select multiple pupils, hold the **Ctrl** key, click each required pupil, then click the **OK** button. To select a block of pupils, click the first pupil, hold the **Shift** key, click the last pupil in the block, then click the **OK** button.

To add an Applicant:

1. Enter their **Surname** and **Forename**. Alternatively, select their **Application Status**, **Intake Group**, **Admission Group**, **Tier** or **House** from the drop-down lists.
2. Click the **Search** button to locate the required applicant.
3. Highlight their name, then click the **OK** button to populate the **Prospective Pupils/Applicants** panel on the **Internal Visit Detail** dialog. To select multiple applicants, hold the **Ctrl** key, click each required applicant, then click the **OK** button. To select a block of applicants, click the first applicant, hold the **Shift** key, click the last applicant in the block, then click the **OK** button.

To Edit Prospective Pupils/Applicants:

1. On the **Prospective Pupils/Applicants** panel, highlight the pupil/applicant you wish to edit, then click the **Open** button to display the **Prospective Pupil/Applicant Visitor** dialog. The **Application Status** is populated automatically.
2. Enter any relevant **Comments** relating to the selected prospective pupil/applicant.
3. If the prospective pupil/applicant **Attended** this visit, select the check box. If this check box is selected, select the prospective pupil/applicant's **Reason for not attending** from the drop-down list. If this check box is not selected, the **Reason for not attending** field defaults to **<None>** and is read-only.
4. Click the **OK** button to return to the **Internal Visit Detail** dialog.

To Add Other Visitors:

Surname	Forename	Role	Comment
Zahoor	Roger	Contact	

The **Other Visitors** panel is used to add the parent/guardians or other contacts you wish to attend the visit.

1. In the **Other Visitors** panel, click the **New** button to display the **Other Visitor** dialog.
2. Click the **Search** button to display the **Browse Other Visitors** dialog.
3. Enter the visitor's **Surname** and/or **Forename** or select their **Role** from the drop-down list.
4. Click the **Search** button to display all visitors who match the search criteria entered and selected.
5. Highlight their name, then click the **OK** button to return to the Other Visitor dialog, where the **Other Visitor** field is populated with the selected visitor. The visitor's **Role** is populated automatically.
6. Enter any relevant **Comments** relating to the visitor.
7. Click the **OK** button to return to the **Internal Visit Detail** dialog.

Saving the Record

Once all the required basic and registration information has been entered, the record can be saved at any point. Click the **Save** button on the toolbar to save your progress. Any missing mandatory information is highlighted in red together with a warning message which is displayed on the Status Bar. This information must be completed before the record can be saved. You can now complete any of the other panels in the **Application** page and save at any subsequent point. The remaining panels of information are the same panels used to record information on existing pupil/students within your school.



Additional Resources:

Maintaining Pupil/Student Information chapter in the *Managing Pupil/Students* handbook



More Information:

Adding/Editing Basic Details on page 170
Adding/Editing Registration Information on page 175
Adding/Editing an Address on page 186
Recording Telephone Numbers and Email Addresses on page 194
Adding/Editing Family/Home Information on page 197
Adding/Editing Medical Information on page 210
Adding/Editing Ethnic/Cultural Information on page 215
Adding/Editing Additional Information on page 222
Adding/Editing Welfare Information on page 231
Adding/Editing a Pupil/Student's School History on page 238
Recording User Defined Fields on page 244

Importing Admissions Data Transfer (ADT) Files

An Admissions Data Transfer (ADT) file contains a list of applicants to your school, together with their relevant known information. These applicants may be children who fall within your Local Authority's (LA) catchment areas or who have named your school as a preference on their Common Application Form. The applicants in an ADT file should be imported into an applicable pre-admission or intake group and then ranked into order of preferred acceptance by applying your school's published selection criteria.

*NOTE: Admissions groups are set up via **Routines | Admission | Admission Groups | Setups**.*

There are currently four types of ADT file:

- **Prime** file – This is the initial file sent by the LA and includes all applicants that have stated a preference for a place at your school. There may be occasions where the initial ADT file does not contain all applications and the LA may need to send additional prime files.
- **Change** file – A parent or guardian may choose to change their school preferences or amend application data by writing to the LA. A change file therefore contains any such amended applications or a change in the data previously supplied in the application, such as an address.
- **Withdrawal** file – A parent or guardian may withdraw their application to your school by writing to the LA. A withdrawn file, therefore, contains applications with a status of **Withdrawn**. The application status in SIMS is updated accordingly.
- **Late** file – Parents must return the Common Application Form to the LA by a specified closing date. Forms received by an LA after this date will be considered as 'Late' applications. LA's will send the late applications to schools in an ADT file which has a status of 'Late'. You should then deal with the late applications in accordance with their admissions policy.

Importing ADT Files

Before proceeding, ensure that you have copied the ADT file received from your LA to a suitable location.

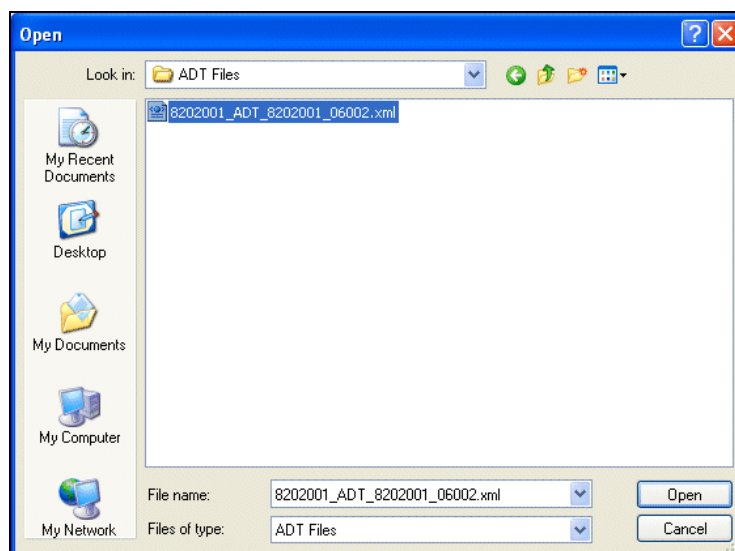
1. Select **Routines | Admissions | Import ADT File** to display the **Import ADT File** wizard.



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

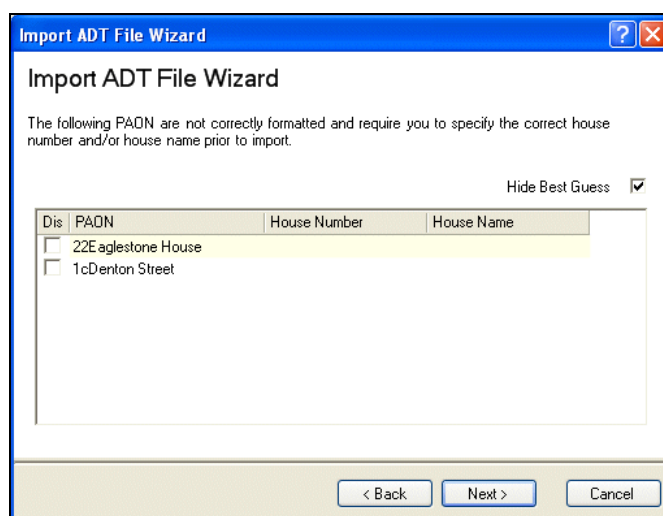


3. Select the required ADT file by clicking the **Browse** button to display the **Open** dialog.



4. Navigate to the location of the stored ADT file then click the **Open** button to attach the file.
5. Click the **Next** button to continue. At this point, applicant's addresses contained in the ADT file are validated. If no address issues are identified, no action is required and the following page would not be displayed. If this is the case, you are prompted to select an intake group as described in step 6.

The **House Number** and **House Name** of an address are held in a single field called **PAON** (Primary Addressable Object Name). Any addresses with incorrectly formatted PAON fields are displayed as shown in the following example:



Only addresses that SIMS cannot reconcile without user intervention are shown.

NOTE: Deselecting the **Hide Best Guess** check box displays all the addresses that SIMS will reconcile automatically.

These addresses can be corrected by clicking in either the **House Number** or **House Name** field (until a flashing cursor appears) and manually entering the correct information as shown in the following example:

Dis	PAON	House Number	House Name
☐	22Eaglestone House	22	Eaglestone House
☐	1cDenton Street		

Alternatively, you can double-click in the **PAON** field where you want the address to be split, e.g. double-clicking in between the **22** and the **E** in **22Eaglestone House** splits the address to **22 Eaglestone House** as shown in the previous example.

Repeat for the remaining addresses. Alternatively, the address details can be discarded (and will not be imported) by selecting the **Dis** check box adjacent to the relevant entry. The address details need to be entered following import.

If a large number of addresses require correction during import, schools should request a correctly structured ADT file from their Local Authority.

- After correcting or discarding any incorrect addresses (if required), click the **Next** button to continue with the import.

NOTE: Please ensure that the Intake Group and pre-admission group selected, have been defined for the correct date of admission before proceeding with the import.

The **Filter by entry year and group** check box is selected by default. This ensures that only pre-admission groups that have been associated with the selected Intake Group are available for selection. De-selecting this check box enables users to select from a list of all the pre-admission groups that have been defined as well as changing the Intake Group.

7. SIMS verifies that the details contained in the header of the ADT (which identifies the admission year for example) correspond to the details of the selected **Intake Group** into which the file is being imported.
8. Highlight the required **Pre-Admission Group** from the list then click the **Next** button to continue. The ADT file is now imported.

IMPORTANT NOTE: When an ADT file that contains applicants who were originally recorded as an enquiry is imported, the application is linked to the enquiry. This enables you to produce conversion rates relating to enquiries that progressed into an application. The original enquiry record is also marked as inactive.

Dealing with Duplicate Applicants

Schools who have either manually entered, or imported applicants via CTF, may encounter some duplicates (and possibly duplicate contacts where an applicant has a sibling in the school for example).

Application Reference Numbers (ARNs) are allocated to each applicant included in the ADT file. ARNs cannot be manually entered into SIMS and therefore, existing applicants stored in SIMS can only have an ARN if they were imported via an ADT file or Admissions Transfer File (ATF) file.

SIMS first tries to match the applicants in the ADT file by ARN. If a matching ARN is found within SIMS, the applicant is deemed to be an exact match and is marked for import without the need for user intervention. Any data for the selected applicant that does not already exist within SIMS is imported from the ADT file.

SIMS next tries to match on UPN, then Surname (Legal Surname) and Forename (Legal Forename). Any matches found are listed in the wizard as shown in the following example:

Name	Reference	DOB	Gender	Matches	Action
Karen King	881-2007-09-K-0100	16/10/2002	Female	☒	Update Applied Applicati
				☐	New person
				☐	New Application

You need to determine whether or not these applicants are duplicates. Use the scroll bar to view all the available details then choose from the following options:

- If an applicant in the ADT file is a match for an applicant already stored in SIMS, select the **Matches** check box adjacent to the **Update Application**. Any data for the selected applicant that does not already exist in SIMS is imported and any applicable existing data is updated.
- If an applicant in the ADT file is a match for an applicant already stored in SIMS, but their application is a new application (i.e. the application stored in SIMS is for another admissions year), select the **Matches** check box adjacent to the **New Application**. Any data for the selected applicant that does not already exist in SIMS is imported and any applicable existing data is updated. In addition, the applicant's ARN is added and the application to the Intake Group and Pre-Admission Group selected for this ADT file is also updated.
- If an applicant in the ADT file is a completely new applicant, i.e. they do not already exist in SIMS, select the **Matches** check box adjacent to the **New person**. A new applicant record is created and all the applicant details available in the ADT file are imported.

*NOTES: Any applicants found in the ADT file who match existing applicants in SIMS and have been marked for import, are only imported if the existing application status stored in SIMS is **Applied**. If the existing SIMS applicant has an application status of **Offered**, **Accepted** or **Withdrawn**, the applicant is not imported and the information is recorded in the Import Log.*

Where a matching applicant is marked for import, any data for the selected applicant that does not already exist in SIMS is imported and any applicable existing data is updated.

1. Click the **Next** button.

SIMS then checks to see if any applicant in the ADT file shares a contact who has already been added to SIMS, e.g. they are a sibling of an existing pupil/student. Any matches are listed in the wizard and must be processed as follows:

- If any of the contacts listed match an existing SIMS contact, select the **Matches** check box adjacent to the correct **Name**.

- If any of the contacts listed are a new contact, select the **Matches** check box adjacent to the **New** person field.

Import ADT File Wizard

The following contacts within the ATF file have been matched with existing people. If you believe that the system has matched a person correctly, please indicate which person is the correct match. When you have completed this press next and the file will be imported.

Name	Title	Address	Matches	Title	Name	Address
Joan Clarke	Mrs		☒	Mrs	Joan Clarke	Test L
			☐		New person	
John Adams	Mr		☒	Mr	John Adams	Test L
			☐		New person	
John Clarke	Mr		☒	Mr	John Clarke	22d-24
			☐		New person	
Mary Jones	Mrs		☒	Mrs	Mary Jones	22 Te
			☐		New person	
Susan Adams	Mrs		☒	Mrs	Susan Adams	22 Te
			☐		New person	

< Back Next > Cancel

2. Click the **Next** button to continue with the import. Once complete, the following page of the **Import ADT File** wizard is displayed:

Import ADT File Wizard

The results of the import are shown below.

Number of applications in file: Number of new applications:

Number of applications processed:

The file imported but with warnings.

Application Reference	Surname	Forename
881-2007-09-K-010002	King	Karen
881-2007-09-K-010001	Adams	Will
881-2007-09-K-010001	Adams	Will
881-2007-09-K-010001	Adams	Will
881-2007-09-K-010002	King	Karen
881-2007-09-K-010002	King	Karen
881-2007-09-K-010001	Adams	Will

Save Print

< Back Finish Cancel

The **Number of applications in file**, the **Number of applications processed** and the **Number of new applications** are displayed, together with a list of any errors or warnings that may have occurred.

Applicants are imported with a status of **Applied** and their details can be viewed and updated through **Focus | Student | Pre-Admission Student**.

3. Click the **Save** button if you wish to save this error log.
4. Click the **Finish** button to complete the process and close the **Import ADT File** wizard.

Late ADT Files

Schools may receive additional ADT files after they have imported the initial ADT file.

A **Late** file enables you LA to send you details of applicants whose applications to join your school were received after the last closing date for applications. Some schools may not entertain late applications at all whilst other schools may occasionally have a spare place remaining.

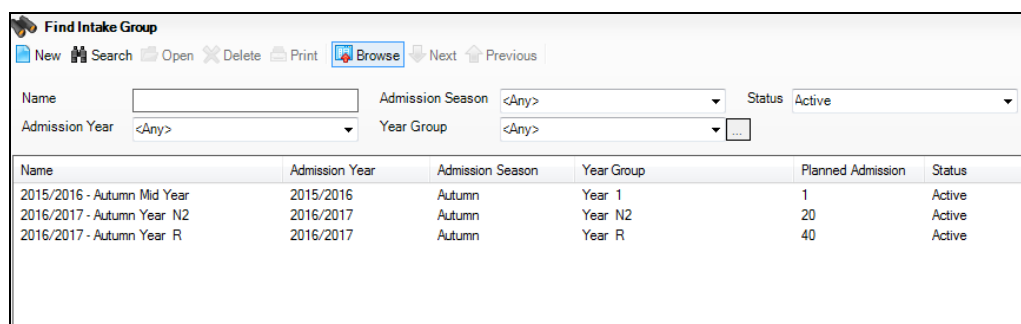
*NOTE: Please refer to the relevant SIMS Admissions Code of Practice handbook for further information. These handbooks are available from My Account (<https://myaccount.capita-cs.co.uk>), and from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category, then click the required handbook from the **Handbooks** page.*

Accepting Applications

When an applicant accepts a place at your school, their **Application Status** should be updated from **Offered** to **Accepted**, enabling you to keep track of their application and run relevant reports as necessary. Applicants are not given an admission number or added to the school roll until their status is changed to **Admitted**. The **Application Status** can be changed in bulk for a group of applicants (as described in the next section), or on an individual basis via the **Applicant Details** page.

Accepting Applicants

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



Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2015/2016 - Autumn Mid Year	2015/2016	Autumn	Year 1	1	Active
2016/2017 - Autumn Year N2	2016/2017	Autumn	Year N2	20	Active
2016/2017 - Autumn Year R	2016/2017	Autumn	Year R	40	Active

2. Search for and then double-click the required Intake Group to display the **Accept / Decline Applications** page.

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

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

Data Type	Description
Planned Admission	The original number of new applicants intended for this intake group.
Total Applicants	The number of applicants who have applied for a place in this intake group.
Applied	The number of applicants who have applied for a place 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.
Admitted	The number of applicants who have been admitted into this intake group.
Reserved	The number of places reserved for applicants (Independent schools only).

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, **Date of Birth** and **Application Status** of each applicant with a tick grid enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

2 Applications								
Current Application Status				Offered				
Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal	Withdrawal Reason	Destination School
Billingsworth, ...	Female	15/12/2010	Offered	☒	☐	☐		
Jones, John	Male	14/10/2010	Offered	☒	☐	☐		
Quince, Laura	Female	16/06/2010	Offered	☒	☐	☐		

- If you want to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** and follow this same process.
- For each applicant in the list, click in the applicable cell/column to insert a tick indicating the required application status. In most circumstances, this is **Accepted** but you may also wish to withdraw applicants at this stage.

- Once complete, click the **Save** button on the toolbar to save the changes. The **Application** panel refreshes its display and show only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list will be empty.

Admitting Applicants

Applicants who are admitted to your school are given an admission number (excluding guest pupil/students) and are also included on your school roll from the date of admission. The DfE regulations on admissions indicate that applicants should be admitted on the first day that you expect them to attend, and not when they actually arrive at the school. If however, you are contacted by a parent who explains why the applicant will not be able to start on the specific date, you can agree a new start date.

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

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2015/2016 - Autumn Mid Year	2015/2016	Autumn	Year 1	1	Active
2016/2017 - Autumn Year N2	2016/2017	Autumn	Year N2	20	Active
2016/2017 - Autumn Year R	2016/2017	Autumn	Year R	40	Active

- 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.

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

Data Type	Description
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.

Data Type	Description
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).
Admitted	The number of applicants admitted so far.

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: **Accepted** Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Withdraw
Billingsworth, Hannah	Female	15/12/2010	02/11/2015	Single Registration	Accepted		No Change			
Jones, John	Male	14/10/2010	02/11/2015	Single Registration	Accepted		No Change			
Quince, Laura	Female	16/06/2010	02/11/2015	Single Registration	Accepted		No Change			

- If you want 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 wish to assign permanent UPNs to the applicants, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN** as shown in the following screenshot:

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Withdraw
Billingsworth, Hannah	Female	15/12/2010	02/11/2015	Single Registration	Accepted		Assign Permanent...			
Jones, John	Male	14/10/2010	02/11/2015	Single Registration	Accepted		Assign Permanent...			
Quince, Laura	Female	16/06/2010	02/11/2015	Single Registration	Accepted		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 screenshot:

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Withdraw
Billingsworth, Hannah	Female	15/12/2010	02/11/2015	Single Registration	Accepted		Assign Permanent...			
Jones, John	Male	14/10/2010	02/11/2015	Single Registration	Accepted		No Change			
Quince, Laura	Female	16/06/2010	02/11/2015	Single Registration	Accepted		Assign Permanent 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. awaiting transfer file/applicant's information).

- 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.

*NOTE: Applicants can be withdrawn at this stage if required by clicking in the **Withdrawal** column adjacent to the applicable applicant.*

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Withdraw
Billingsworth, Hannah	Female	15/12/2010	02/11/2015	Single Registration	Withdrawal		No Change		✓	
Jones, John	Male	14/10/2010	02/11/2015	Single Registration	Admitted		Assign Permanent..	✓		
Quince, Laura	Female	16/06/2010	02/11/2015	Single Registration	Admitted		Assign Permanent..	✓		

- 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 will be empty.

Deleting an Application

There may be occasions when an application needs to be deleted. This could be because:

- the application has been entered in error
- an applicant has decided not to attend your school and you do not want to record them as withdrawn
- you are an Own Admissions Authority school and are oversubscribed. You may therefore want to delete any applications imported from an ADT file supplied by your Local Authority, where a place has not been offered that. This should be carried out in April, after the possibility of an appeal has passed.

- Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.



Application icon

- Search for the required application, then click the applicant to highlight their record.
- After ensuring that you have identified the correct application, click the **Delete** button on the browser toolbar.

A warning message is displayed: Deleting Applications will affect your annual statistics and is irreversible. Are you sure you wish to continue?

4. Click the **Yes** button to delete the application.

An additional message is displayed: The application has successfully been deleted from the system.

Changing the Status of an Individual Application

In addition to changing the application status in bulk, it is also possible to change the status for individual applicants as follows:

1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.



Application icon

NOTE: Only applicants with a current **Application Status** are displayed by default (i.e. applications with a status other than **Withdrawn**, **Rejected** or **Admitted**).

2. Search for and select the required applicant to display the **Application** page.

Application: Jones, John

Save Undo Print

1 Basic Details 2 Registration Details 3 Address 4 Telephone and Emails 5 Family / Home Details 6 Dietary 7 Medical Details 8 Ethnic / Cultural

1 Basic Details

Legal Forename: John
 Middle Name(s):
 Legal Surname: Jones
 Preferred Surname: Jones
 Preferred Forename: John
 Date of Birth: 14/10/2010
 Current Age: 5 years
 Gender: Male
 Birth Certificate Seen: ☐
 Former UPN:
 UPN:
 Quick Note:

Photograph:

2 Registration Details

Application Status: Applied
 Intake Group: 2015/2016 - Autumn Mid Year
 Year Group: Year 1
 Class: ELM
 Date Of Admission: 02/11/2015
 Admission Number:
 Boarder Status: Not a Boarder
 Local UPN:
☐ Part-Time
 Start Date:
 End Date:

Application Reference Number:
 Admission Group: 2015/2016 - Autumn Mid Year (A)
 Year Taught In: Curriculum Year 1
 House:
 Age On Entry: 5 years
 Enrolment Status: Single Registration
 Late Application: ☐
 Tier 4 Application: ☐

3. The current status of the application is displayed in the **Application Status** drop-down list in the **Registration Details** panel. Select the required new status from the drop-down list.

NOTE: It is possible to select any application status (skipping a status if required), i.e. there is no need for the statuses to be selected in order.

The status can be changed to any of the following:

Status	Description
Applied	Select this status if the applicant has applied for a place in the selected intake group.
Offered	Select this status if the applicant has been offered a place in the selected intake group.

Status	Description
Accepted	Select the status if the applicant has accepted a place in the selected intake group.
Admitted	Select this status if you wish to admit the applicant into the selected intake group. Admitting applicants gives them an admission number (excluding guest pupil/students) from the admission date specified for the intake group. They will then be included on the school roll. You should therefore admit applicants only when they actually arrive at your school. Once admitted, if they do not arrive, they can only be removed from the system by deleting them.
Rejected	Select this status if the applicant has failed the selection criteria and has not attained a place in the selected intake group (Independent and Northern Ireland schools only).
Reserved	For Independent schools only – select this status if you wish to reserve a place for the applicant. They will not appear in any routines for finalising offers, accepting or admitting until their status is changed.
Withdrawn	Select this status if the applicant has withdrawn their application from the selected intake group.

- Click the **Save** button to save the new application status.

Re-admitting Pupil / Students

Any pupil/student who leaves the school and subsequently decides to return needs to be re-admitted. Do not simply remove the date of leaving as this will not show a period of absence from the school. However, if a pupil/student is intending to leave, but subsequently changes their mind (i.e. does not leave), the date of leaving can be removed.

If you need to analyse this information or need to record new registration or deposit fees, you must create a new application. If a student is going to return in the future, this must be processed via a new application. This applies also to students who leave for only a few days. However if a student is starting immediately and you do not need to record a deposit or analyse the details, you can process this directly through the student record.

- Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Pupil (or Student) Details** page.
- Click the **New** button to display the **Basic Details** panel.

Basic Details

Surname: Forename:

Gender: Date of Birth:

It is only necessary to enter limited information in this panel as you know that the person already exists. It is advisable not to be too specific with the search criteria (e.g. just enter the first few letters of the **Surname** and the gender) to ensure that the existing pupil/student is found.

NOTE: If the pupil/student name has changed since leaving, ensure that you search on their previous name.

- Click the **Continue** button to display a list of **Matched People** based on the search criteria entered.

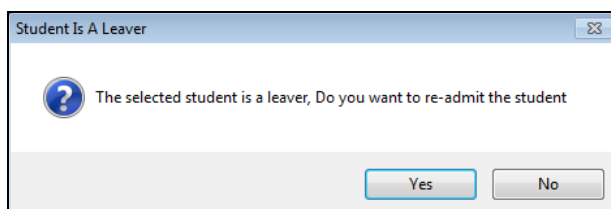
Matched People
The following people known to the SIMS database have similar details.
To add a new Student with the details entered above, select New.
To add an existing person or edit a known Student, select Open.

Full name	Gender	Roles	Address
Smith, Callum	Male	Student, Candidate, Applic...	15 Birch Grove Elm Wisbe.
Smith, Dan	Male	Student, Candidate	Ye Olde Plough Kimbolton
Smith, Mr Daniel	Male	Contact	2 Castle Terrace Pembroke
Smith, Mr Dave	Male	Contact	Priestgate House Priestgat.
Smith, David	Male	Student, Candidate, Applic...	18 Vine Street Stamford PE
Smith, Mr David	Male	Contact	6 Wellington Place Bletchl.
Smith, David	Male	Student, Candidate, Applic...	21 Mill Street Bedford MK4
Smith, Mr David	Male	Contact	10 Hadleigh Close Bedford
Smith, Mr Edward	Male	Contact	126 High Street Stony Strat
Smith, Geoff	Male	Applicant	
Smith, Daniel	Male	Student, Applicant	10 Hadleigh Close Bedford

New Open

*NOTE: Check the role is **Student** in case a parent or other contact has the same name.*

- Highlight the required pupil/student and click the **Open** button. The following warning message is displayed:



- Click the **Yes** button if you are certain that this is the pupil/student who is to be re-admitted. Their details are displayed in the **Pupil (or Student) Details** page.
- Complete the mandatory fields (**Registration Group**, **Year Group**, **Year Taught In**, **Enrolment Status** and **Admission Date**) and check any other details which may have changed since they were last on-roll (such as their address). Ensure that the UPN is recovered or a new UPN generated if it did not previously exist.
- Click the **Save** button on the toolbar to re-admit the pupil/student. Any mandatory fields are highlighted in red and must be completed before the record can be saved.

If the pupil/student's registration status has changed from when they were previously on-roll, you need to change the enrolment status via **Routines | Pupil (or Student) | Change Enrolment Status**.

10 | Recording Communications and Follow Ups

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Introduction

It is possible to search for and record details of any communications that you receive from, or send to, the contact or parents of a prospective pupil or existing applicant. It is also possible to attach documents that you have received electronically or scanned into SIMS.

The type of communication could range from an initial enquiry regarding admission places, through to the application being accepted and subsequent correspondence during the applicant's time at the school.

This facility also enables the recording of communications relating to fees, deposits and bills, for those schools using Fees.

Communication details can be accessed and entered in a number of ways. Accessing the **Communication** browser via **Focus | Communication** enables you to search for all communications to see which may have already been entered into SIMS. You can click on the relevant columns in the **Communication Browser** to sort them and aid in your search. For example, clicking on the **Follow Up** column allows you to sort the communications in order of their need for a follow up contact. For schools using Fees 7, the search functionality enables the sorting of communications by **Priority** using this method. Communications can be added via **Focus | Communication**, which is beneficial in selecting multiple applicants (or prospective pupil/students) for communications made on behalf of several people.

You can also access the **Communication Details** browser from within an applicant's or enquirer's details by clicking the **New** button adjacent to the **Communications** panel on the **Application Details** or **Enquiry Details** page. This is useful when searching for, or adding, a specific communication regarding an applicant (or prospective pupil/student).

The following process describes the method of adding a communication via **Focus | Communication**.

Searching for a Communication

1. Select **Focus | Communication** to display the **Communication** browser.

Surname	Forename	Direction	Date	Type	Follow Up	Notes
Ackton	Richard	Sent	31/01/2014 17:12	Telephone		Insolent behaviour - behaviour c

2. Enter the **Forename** and **Surname** of the individual from whom the communication was sent or received. Alternatively, select their **Role** from the drop-down list e.g. **Enquirer** or select the **Type** of the communication.
3. Click the **Search** button to display all individuals who match the search criteria entered.

*NOTE: You can click the column headings to sort the communications by various criteria. Clicking the same heading again reverses the sort order. For example, clicking the **Direction** heading enables you to sort the communications in order of those **Received** or **Sent** by the school.*

4. Highlight the required communication, then click the **Open** button to display the **Communication Details** page.

Adding a Communication

Using the Communications facility, you can add new communications, follow-up any communications that have already been received and keep a complete history of all correspondence between the school and the applicant's contact/parents.

1. Select **Focus | Communication** to display the **Communication Details** browser.

- After searching for an existing communication to ensure that it does not already exist (please see *Searching for a Communication* on page 300), click the **New** button to display the **Communication Details** page.

Communication Details

Save Undo Print

1 Basic Details 2 Summary Notes 3 Follow Up 4 Linked To 5 Conversation Thread 6 Attached Documents

1 Basic Details

Communicatee: Samantha Barnes

Communicator: Belinda Bates

Type: Email Direction: Sent

Date: 15/01/2018 Time: 10:20:00

Log Confidentiality: Confidential

About:

Name	Role

New Open Delete

2 Summary Notes

3 Follow Up

☒ Required on: 20/01/2018 Create

4 Linked To

Summary	Type

Go To

To ease navigation and to enable only the details you wish to view to be displayed, click the chevron button at the top right-hand side of any of the panels on this page to show or hide its content.

Adding Basic Communication Details

- To select the person to whom the communication is concerned, click the **Browse** button adjacent to the **Communicatee** field in the **Basic Details** panel to display the **Find a Communicatee** dialog.

SIMS Find a Communicatee

Search Criteria

Surname: Dean Forename: Role: <Any>

Search

Search Results

Surname	Forename	Role
Dean	Freya	Contact
Dean	George	Contact
Dean	James	Contact
Dean	Jennifer	Contact

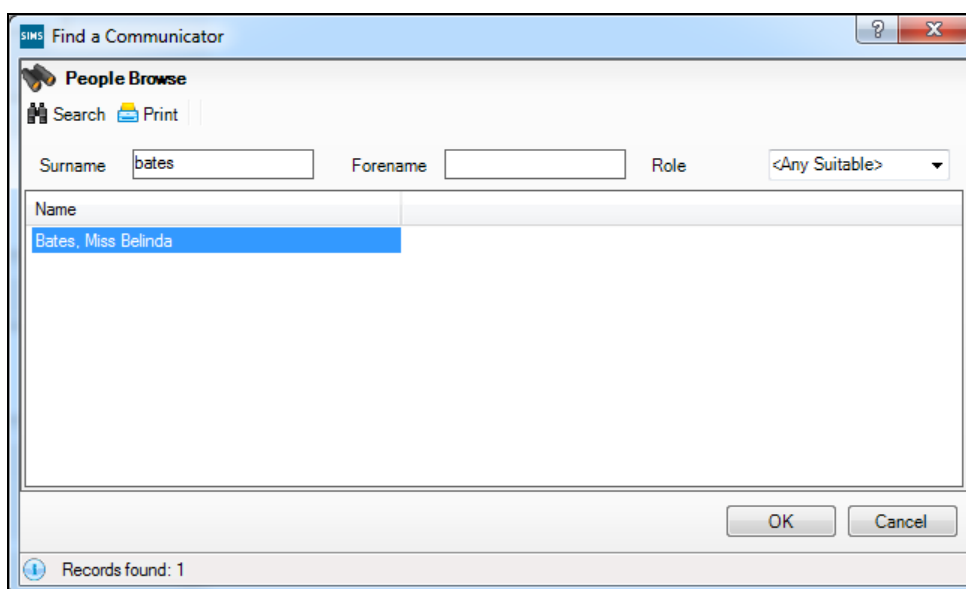
OK Cancel

4 matches found

2. Enter the **Surname** and **Forename** of the communicatee or select their **Role** from the drop-down list. Alternatively, leave all the fields blank, then click the **Search** button to display all communicatees recorded in SIMS.
3. Highlight the required communicatee, then click the **OK** button to return to the **Communication Details** page, where the **Communicatee** field in the **Basic Details** panel is populated.

The **Communicator** field in the **Basic Details** panel is populated automatically with the name of the person creating the record.

4. If the communication was made by another member of staff, click the **Browse** button adjacent to the **Communicator** field to display the **Find a Communicator** dialog.



5. Enter the **Surname** and **Forename** of the communicator or select their **Role** from the drop-down list. Alternatively, leave all the fields blank, then click the **Search** button to display all people recorded in SIMS.
6. Highlight the required person, then click the **OK** button to return to the **Communication Details** page, where the **Communicator** field in the **Basic Details** panel is populated.
7. If the communication was made by a person who is not a member of the school's staff, click the **Remove the communicator from this communication** button adjacent to the **Communicator** field. This clears the content from the **Communicator** field.
8. For users of Fees 7, the **Priority** field is provided. Select the **Priority** from the drop-down list. This provides a **Priority** field, which can be used to order the display of communications when searching.
9. Select the **Type** of communication from the drop-down list. Additional communication types can be added via **Tools | Lookups | Maintain**.
10. For users of Fees 7, an additional **Type** field is provided, which enables you to select a fees-related communication type e.g. **Fees Communication**.
11. Select the **Direction**, which indicates whether the communication was **Received** by the school or **Sent** from the school.

The **Date** that the communication was received or sent defaults to today's date but it can be changed by clicking the **Calendar** button, then selecting the required date. The **Time** field is also populated automatically.

12. Select the status of the communication from the **Log Confidentiality** drop-down list.
 - **Public** - the communication is available to those with view and view/edit access rights. Individuals with view and view/edit access rights to private and confidential as well as public communications will also be able to change the status of the communication from public to private or confidential.
 - **Confidential** - the communication is available only to the school administrator, the senior leadership team and the SENCo for messages. These people have permission to view and view/edit a communication. Only the owner of a confidential communication and the school administrator will have the right to delete any confidential communication and to make any confidential communication public. This will be particularly important where originators of the communication have left the school.
 - **Private** - the communication is available to those saving it. If required only the owner of a Private communication will be able to make it Public. The system manager will be able to delete the Private communication, where, for example, the owner is no longer employed by the school.
13. Click the **New** button adjacent to the **About** field to display the **Find a person the communication is about** dialog.

Surname	Forename	Role
Aaron	Chris	Student, Applicant
Aaron	Liz	Student, Applicant
Aaron	Sophie	Student, Applicant
Abdullah	Tamwar	Student, Applicant
Abhra	Abjit	Student, Applicant
Abhra	Alisha	Student, Applicant
Abhra	Neel	Student, Applicant
Abraham	Jane	Student, Applicant
Ackton	Bill	Student
Ackton	Stan	Student, Applicant
Ackton	Stan	Student, Applicant
Ackton	Stephen	Student, Applicant
Acton	Jordan	Student, Applicant

14. Enter the **Surname** and **Forename** of the person or select their **Role** from the drop-down list. Alternatively, leave all the fields blank, then click the **Search** button to display all people recorded in SIMS.
15. Highlight the required person, then click the **OK** button to return to the **Communication Details** page, where the **About** table is populated.
16. Enter any comments (up to a maximum of 500 characters) in the **Summary Notes** panel.

The **Summary Notes** panel is useful for viewing/adding concise details of the communications sent from, and received by, your school.

If the communication relates to an enquiry, the **Summary Notes** field displays the enquiry reference number allocated by SIMS.

17. **Save** the information entered in the **Basic Details** and **Summary Notes** panels.

*NOTE: If you do not save the details entered in the **Basic Details** and **Summary Notes** panels, the **Create** button will not be activated in the **Follow Up** panel.*

18. If a **Follow Up** is actioned by the school, select the **Required** check box, then enter the date on which the follow up should be carried out. If you click the **Create** button before clicking the **Save** button, a **Conversation Thread** is created with a date and time stamp.

19. If the communication is connected to an enquiry, an application or a fees payment, the nature of the link is displayed in the **Linked To** panel. Click the **Go To** button to view the details of the link.

Summary	Type
Enquiry 0000000013	Enquiry

20. Click the **Save** button.

Viewing the Conversation Thread

The **Conversation Thread** panel enables you to view the full details of all communication traffic involved in the current communication.

The panel displays information on the date and time at which each communication entry has been saved, together with the details entered in the **Summary** panel.

Click to highlight an entry, and click the **Go To** button to display the full details of this communication entry in the **Communication** page.

Attaching Documents

Documents can be attached to the communication record (please see *Adding Notes/Documents* on page 375).

Deleting a Communication

WARNING: Careful consideration should be given before deleting a communication because once it has been deleted it cannot be recovered.

1. Select **Focus | Communication** to display the **Communication Details** browser or click the **Communications** hyperlink on the **Enquiry Details** or **Application Details** page.
2. Search for the required communication (please see *Searching for a Communication* on page 300), highlight it, then click the **Delete** button.

11 | Importing and Exporting CTFs

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Importing CTFs

IMPORTANT NOTES: Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a Server. The DfE recommends ISO27001 as the standard for information security (<http://www.itgovernance.co.uk/iso27001.aspx>). If you are in any doubt, you should consult with your IT Security Officer before proceeding. Please ensure that you use either CTF or ATF files to import pupil/students into SIMS. Using both methods can produce duplicate entries.

Common Transfer Files (CTFs) are used to electronically import and export data for pupil/students transferring from one school to another. Each transfer file can contain details of the transferring pupil/student (such as contacts, attendance history, assessment data, etc.) in addition to details of the transferring and receiving schools. Using CTF saves time for both schools (exporting from one school and importing into the other) and provides a method of moving data accurately.

Once generated, the CTF can be transferred by School to School (<https://www.gov.uk/guidance/school-to-school-service-how-to-transfer-information>) or other local secure file transfer mechanisms.

Children with CTFs can be imported directly on-roll or into a pre-admission group as required.

If any of the pupil/students already exist in the system, any blank fields in their record are updated with data from the CTF file. Any existing data is considered to be the most up to date information and is therefore not overwritten.

Information Transferred via CTF

The information transferred when CTF files are sent is set up from the **Configure CTF Defaults** page, accessed via **Tools | Setups | CTF**.



Additional Resources:

Setting Up CTF Configuration Defaults section of the *General SIMS Setups* chapter in the *Setting Up and Administering SIMS* handbook

Before Importing a CTF

Before importing CTFs, you must ensure that:

- the CTF configuration defaults have been set up via **Tools | Setups | CTF**.
- the feeder school exporting the child is defined in your system via **Tools | Setups | Other Schools**.
- schools wishing to import SEN Details have previously set up an SEN Co-ordinator through **Tools | Setups | SEN Setup**.
- any required pre-admission groups must have been created.
- if you intend to import any assessment results, the required Assessment Manager Aspects must have been previously created or imported.
- the address data in the CTF is in <BS7666Address> format, not <Address Lines> format. If the address format is <Address Lines>, then you must run CTF_ATF_AddressLinesConverter located in the C:\Program Files\SIMS\SIMS .net folder to convert the address format.



Additional Resources:

Setting Up CTF Configuration Defaults section in the *Setting Up and Administering SIMS* handbook
XML AddressLines Conversion Utility handbook

Important Notes on Importing a CTF

Data Category	Description
Student Basic Details	Not all ethnicity codes can be transferred between England and Wales. As some schools use Main ethnicity codes, such as Black African, and others use Extended ethnicity codes, such as Black - Ghanaian, this can affect the accuracy of the transferred ethnicity data. If the school that sends the CTF and the destination school use different ethnicity codes, SIMS attempts to find the closest match. The Exception Log displays any instances of inexact or failed matches, and the Error Description column displays either: - What ethnicity code the data has been imported as. - That it has failed to find a match. In this case, the ethnicity data imports as NOBT - Information not obtained.
SEN Information	Only SEN Statuses of N - No Special Educational Need or S - Statement transfer from schools in England to schools in Wales, and vice versa. If the pupil/student already exists in SIMS and has a SEN Status, this may cause the data to not be imported from the CTF. If this is the case, a relevant entry is displayed in the Exception Log. If the pupil/student already exists in SIMS but the SEN statuses in SIMS and the CTF differ, SIMS assumes that the SEN Status with the most recent Start Date is correct. The status with the older Start Date then terminates the day before the Start Date of the more recent status. A message is displayed to confirm this. If the SEN Status in the CTF is not recognised in SIMS Lookups, then the data is not imported and an entry is recorded in the Exception Log. SEN Needs cannot be transferred between countries.
Exam results	When importing exam results via CTF from a school that has not been recorded in SIMS, an indirect feeder school record is created in Tools Other Schools.

Data Included in the CTF Files

CTF Details

Applicable Regions	Data Details
England and Wales	Document Name CTF Version Date and Time Document Qualifier Data Qualifier Data Descriptor Supplier ID Source School Destination School

Student Basic Details

Applicable Regions	Data Details
England and Wales	UPN (Unique Pupil Number) ULN (Unique Learner Number) UCI (Unique Candidate Identifier) - Secondary schools only Surname Forename Date of Birth Gender Former UPN Preferred Surname Former Surname Legal Surname Preferred Forename Middle Names National Curriculum Year Ethnicity Ethnicity Source Language Information (Language Type and Language) Country of Birth Free School Meals Eligibility Free School Meals Review Date Medical Flag Disabilities Enrolment Status Phones Email Supplier Info
England only	Nationality Proficiency in English Service Child in Education

SEN Information (All Regions)

Applicable Regions	Data Details
England and Wales	SEN History SEN Basic Needs - (Start Date and SEN Provision) SEN Needs (SEN Type Rank, SEN Type, SEN Need Start Date, SEN Need End Date) SEN Provision End Date
Wales only	SEN Provisions (Curriculum and Teaching Methods, Grouping and Support, Advice and Assessment, Specialised Resources)

Attendance Summary

Applicable Regions	Data Details
England and Wales	Year Date Year LEA Establishment Number School Name Sessions Possible Sessions Attended Sessions Unauthorised Sessions Authorised

Student Address

Applicable Regions	Data Details
England and Wales	BS7666 Address Information SAON PAON Street Locality Town County Postcode Country UPRN (Unique Property Reference Number)

Assessment Data (for England, KS1 tasks / tests is also included)

Applicable Regions	Data Details
England and Wales	Key Stage Information Stage Description Stage Assessment Locale Year KS Subject Method Component Result Status Result Qualifier Result Result Date

Programme of Study (PoS) Assessments

Applicable Regions	Data Details
England and Wales	Supplier Result Date Grade

School History

Applicable Regions	Data Details
England and Wales	School Information LEA Number Establishment Number School Name Entry Date Leaving Date Leaving Reason Last School

FSM History

Applicable Regions	Data Details
England and Wales	FSM Review Date FSM Start Date FSM End Date

Looked After

Applicable Regions	Data Details
England and Wales	InCare Care Authority

Student Contacts

Applicable Regions	Data Details
England and Wales	Order Title Surname Forename Middle Names Gender Relationship Address Phones Email

External Exam Results

Applicable Regions	Data Details
England and Wales	SuppID Board Level Subject ResultType Gradeset AspectName LEA Estab Month Year Result

NAW Details (Welsh Tags)

Applicable Regions	Data Details
Wales only	Speak Welsh National Identity

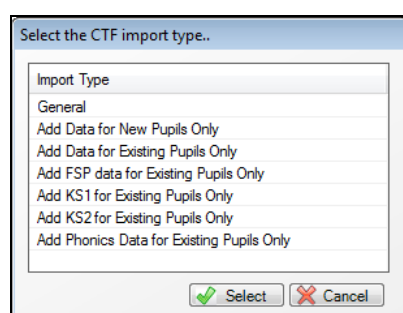
Importing a Common Transfer File (CTF)

The Core data (UPN, Surname, Forename, Gender and Date of Birth) is mandatory and is always imported.

IMPORTANT NOTES: You are strongly advised to run the Address Tidy and Merge routine before importing or exporting a CTF to reduce the number of potential issues with regard to address matching.

Any pupil/students records where the reason for leaving is recorded as **Deceased** are not imported.

1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog.



This dialog enables you to create the following types of CTF:

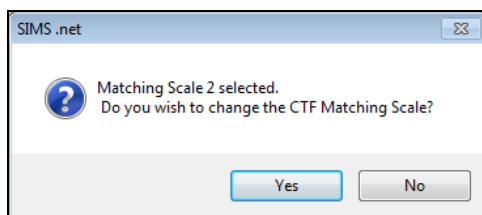
- **General** - imports a full CTF export file.
- **Add Data for New Pupils Only** - imports data for pupil/students who do not already exist in SIMS.
- **Add Data for Existing Pupils Only** - imports data in the CTF for pupil/students who already exist in SIMS.
- **Add FSP data for Existing Pupils Only** - imports Foundation Stage Profiles data in the CTF for pupil/students who already exist in SIMS.
- **Add KS1 for Existing Pupils Only** - imports Key Stage 1 data in the CTF for pupil/students who already exist in SIMS.
- **Add KS2 for Existing Pupils Only** - imports Key Stage 2 data in the CTF for pupil/students who already exist in SIMS.
- **Add Phonics Data for Existing Pupils Only** - imports Phonics Test result data for pupil/student who already exist in SIMS.

NOTES: Secondary schools in England are provided with additional options. The **Add ULNs for Existing Pupils Only** option imports only the ULNs for students who already exist in SIMS.

Secondary schools in Wales can **Add Welsh National Test data for Existing Pupils Only**. This CTF Import Type imports National Test result data for students who already exist in SIMS.

11 | Importing and Exporting CTFs

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.



This message relates to the **Match and Import** panel on the **Import CTF** page, which enables you to examine the data stored in SIMS against the information in the CTF and decide which information should be imported.

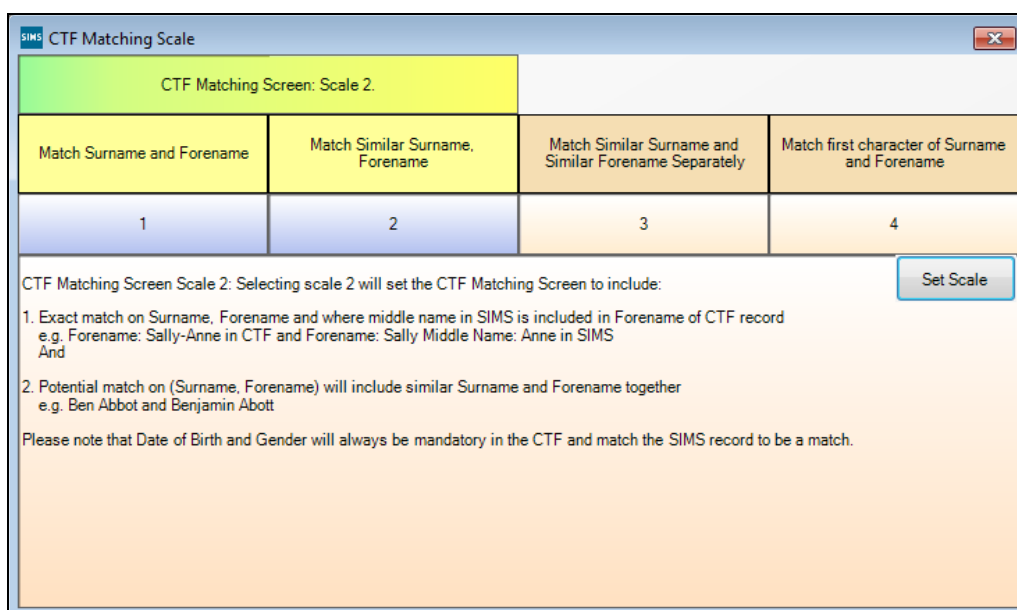
NOTES: The matching method used in previous versions of SIMS has not changed, neither have the data items contained in the CTF file.

*The functionality provided by the **Match and Import** panel on the **Import CTF** page is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF using the original method.*

*When using the **Match and Import** panel on the **Import CTF** page, you are strongly advised to use a screen resolution of 1280x1024.*

The scale defaults to level **2**, indicating that the system will match on similar surname and forename.

3. If you wish to remain on level **2** of the matching scale, click the **No** button to display the **Import CTF** page then import the CTF (please see *Importing the CTF* on page 325). The page name is appended with the option selected in the previous dialog. To change the matching scale, click the **Yes** button to display the **CTF Matching Scale** dialog.



This screen enables you to select the required scale from the following:

- Scale **1** – Match Surname and Forename
- Scale **2** – Match Similar Surname and Similar Forename
- Scale **3** – Match Similar Surname and Similar Forename Separately
- Scale **4** – Match first character of Surname and first character of Forename

The corresponding number indicates the level of matching you wish to carry out, with level 1 being the most strict and 4 being the most flexible.

4. Select the required matching scale by clicking the required heading (e.g. **Match Surname and Forename**) or the required level number (e.g. **1**).

Clicking the required matching scale displays in the bottom panel of the screen, more detailed information on the selected scale.

5. Confirm that you wish to implement the new matching scale by clicking the **Set Scale** button to display the **Import CTF** page.

***NOTE:** The matching scale can be changed later in the process via the **Match and Import** panel on the **Import CTF** page.*

Import CTF (General)

1 Data to be Imported 2 Import Selection 3 Exception Log

1 Data to be Imported

Student Basic Details	☒	Student Address	☒	Student Contacts	☒	Looked After	☒
SEN Information	☒	Assessment Data	☒	School History	☒	External Exam Results	☒
Attendance Summary	☒	Programme of Study(PoS) Assessments	☒	FSM History	☒		

2 Import Selection

CTF File

Place new pupils in Effective Date

Pre-Admission Group	Admit On	Year Group
2016/2017 - Summer Year 7 (A)	01/09/2016	Year 7

Proceed For Match Import

The categories of data that can be imported via CTF are displayed in the **Data to be Imported** panel. Any data item where the adjacent check box is selected indicates an item that will be imported by default.

***NOTES:** The data items that will be imported by default are defined on the **Configure CTF Defaults** page (via **Tools | Setups | CTF**).*

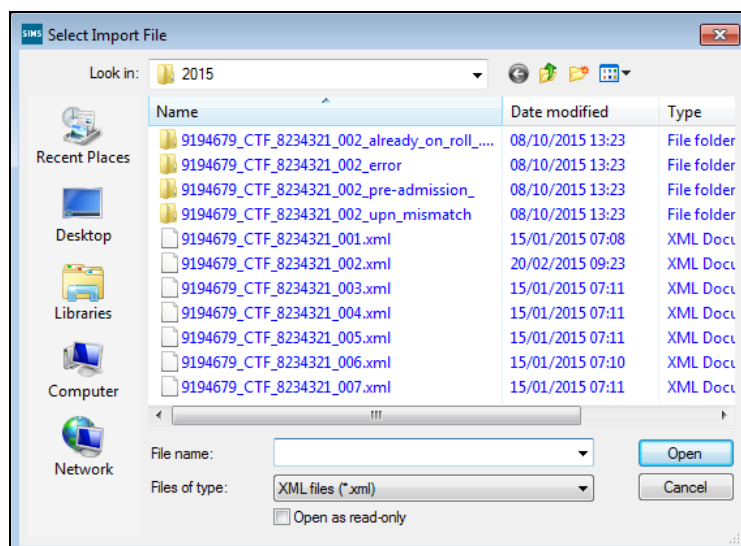
When importing a CTF, the enrolment status in a pupil/student's school history is now set to <null>.

Amend the default settings by selecting or deselecting the appropriate check box(es), if required.

11 | Importing and Exporting CTFs

***TIP:** Hover the mouse over each check box to view a list of the data in each section, as shown in the following graphic.*

6. Select the CTF File you wish to import by clicking the **File Browser** button in the **Import Selection** panel to display the **Select Import File** dialog.



7. Navigate to and highlight the required CTF file then click the **Open** button to return to the **Import CTF** page.

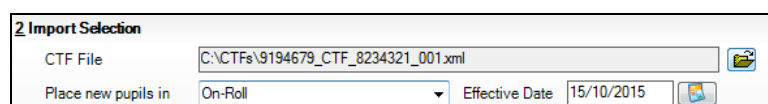
***NOTE:** Before the import takes place, SIMS checks that the CTF file you have selected is intended for your school by validating the header information contained in the file and the CTF file name. The header information contains the Local Authority number and Establishment Code for your school. If the file you are trying to import is not intended for your school, a warning message is displayed and the import should be abandoned. If the CTF file field appears red, the file is likely to be invalid. The file name should contain the Local Authority number/school number of the sending school and the Local Authority number/school number of the receiving school.*

8. Select whether you wish to place the pupil/students contained in the CTF file into a **Pre-Admission** group or **On-Roll** from the **Place new pupils in** drop-down list.

If you wish to place them in a **Pre-Admission** group, highlight the required group in the table.

If you wish to place them **On-Roll**, select an **Effective Date** (i.e. place them on-roll as of this date) by clicking the **Calendar** button then selecting the required date.

If you select **Guest**, the **Effective Date** field is displayed, which defaults to today's date but can be amended by selecting from the Calendar. This enables data to be imported into SIMS (including group memberships) as of a specified date. Pupil/students imported as guests will not be allocated admission numbers or be registered for attendance.



You might wish to enter an earlier date if, for example, the CTF is received after the pupil/student has been admitted to the school. If the CTF is imported after the pupil/student has been admitted, their group memberships will commence as of the current date. Selecting an earlier date, i.e. when the pupil/student arrived at the school, enables the group memberships to be set accurately and without the need for manual intervention.

If you leave the date as the default, CTF import creates membership information (e.g. ethnic, religion, etc.) for an on-roll pupil/student as of the day of import, meaning you must change these membership dates manually to make them accurate, if required.

11 | Importing and Exporting CTFs

9. With the correct options selected, click the **Proceed For Match Import** button to display the **Match and Import** panel.

3. Match and Import

This Match and Import screen is used to match pupils in the CTF import file and SIMS. The CTF file can be imported at any point of the matching process. When the CTF is being imported, the matches identified in the 'Selected Pupil' column will be applied. When you are ready to import the CTF file, click the 'Import CTF' button at the bottom of the page.

[Refresh](#)

Indicator	CTF Pupil	Pre-Admission Pupil	Admitted Pupil	Selected Pupil
	Dorman_Aboud	No data found	Dorman_Aboud [1]	Dorman_Aboud
	Ekwueme_Acoba	Ekwueme_Acoba [1]	Ekwueme_Acoba [2]	Ekwueme_Acoba
	Vinal_Acton	No data found	No data found	Invalid Pupil

[View CTF Matching Scale For Potential Matches](#)

Match from following:

Positive Match
 Dorman_Aboud

Potential Matches

CTF Details:
Total Pupils in CTF File: 3
[<< Previous](#) [Next >>](#)

A maximum of 50 pupils are displayed on one page.
Please click Next to move to the next 50 records if applicable.

CTF Pupil Details

Names	Details
UPN	N919467903128
Former UPN	
Surname	Aboud
Former Surname	
Forename	Dorman
DOB	20/02/2000
Gender	M

[Pre CTF Import Report](#) [Import CTF](#)

Matching Pupil/Students and Importing the CTF File

The CTF Matching routine enables you to define how a record in a CTF is imported into SIMS. It also enables you to select a record in the CTF that matches a record in your SIMS database then update the SIMS database with any missing details.

The method used to match a record in the CTF with a record in the SIMS database can be changed, enabling you to be as strict or as flexible as necessary.

IMPORTANT NOTE: The functionality provided by the **Match and Import** panel is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF using the original method by clicking the **Import CTF** button in the **Match and Import** panel without making any changes in this panel.

The **CTF Pupil** column displays pupil/students who are either pre-admission or on roll.



Pre-Admission Pupil/Student icon

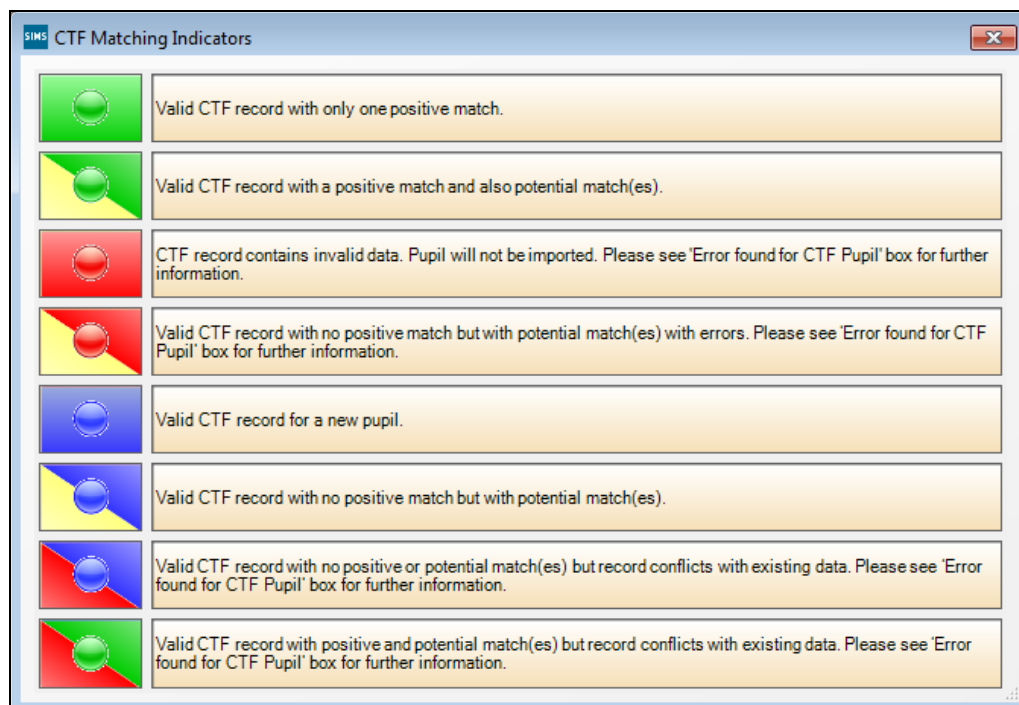


On Roll Pupil/Student icon

CTF Matching Indicators

The **Match and Import** panel displays indicators that help you to identify whether the CTF record has any conflicts and shows how the pupil/student record will be imported into SIMS.

Click the **Indicator** link to display the **CTF Matching Indicators** dialog, which shows a detailed description of each indicator.



Exit the **CTF Matching Indicators** dialog to return to the **Match and Import** panel.

CTF Matching Scale

The **Match from following** panel includes a link that can be selected to show the **CTF Matching Scale (View CTF Matching Scale For Potential Matches)**.

*NOTE: The **CTF Matching Scale** is read-only. Any changes will need to be made by re-opening the **Import CTF** page by selecting **Routines | Data In | CTF | Import CTF**.*

Two grids are displayed in the **Match from following** panel.

- **Positive Match** – the record the CTF would match upon import if no action is taken.
- **Potential Matches** – could display more than one potential match from either the pre-admission or on-roll records.

The cell you select in the **Match and Import** panel will determine what is displayed in the **Match from following** section on the right-hand side of the panel.

- If you select a cell in the **CTF Pupil** column, all potential matches (whether on-roll or pre-admissions) will be displayed in the **Match from following** section on the right-hand side of the panel.
- If you select a cell in the **Pre-Admission Pupil** column then only pre-admission potential matches will be displayed.
- If you select a cell in the **Admitted Pupil** column then only the admitted potential matches will be displayed.
- If you select a cell in the **Selected Pupil** column then on-roll and pre-admission pupils will be displayed.

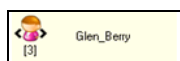
The users can agree with the system that the positive match is correct and leave as the **Selected Pupil** or they can double click on a potential match and then that match will become the **Selected Pupil** which is the CTF record that will be updated.

Additional Functionality

If you decide that the **Selected Pupil** and/or potential student/pupil(s) are incorrect matches, then right-click the **Selected Pupil** and select **Remove selection** to change the selection to a **New Pupil** or a **Conflicting Pupil**.

If you right-click the **CTF Pupil** column and select **Add as a new pupil**, the content of the **Selected Pupil** column changes from **Positive Match** or **Manual Match** to **New Pupil**.

If you right-click the **CTF Pupil** column and select **Do not import this pupil**, the selected pupil will not be imported.



The number under the symbol reflects the number of matches found. The first name in the grid is displayed in the pupil cell but all matches are displayed in the **Match from following** grid.

Refreshing

Clicking the **Refresh** button when data in SIMS has been changed affects the pupil/students in the **Match and Import** panel.

The following is an example of a change you may wish to make in the **Match and Import** panel.

Indicator	CTF Pupil	Pre-Admission Pupil	Admitted Pupil	Selected Pupil
	Dorman_Aboud	Dorman_Aboud [1]	Dorman_Aboud [1]	Dorman_Aboud

Dorman Aboud has a UPN in CTF that matches the pre-admission pupil record in SIMS. However, you may wish to make the admitted pupil in SIMS match to the CTF record so that upon import all the information apart from the UPN will be imported to the admitted pupil.

You can delete the pre-admission record which will delete the UPN and allow it to be assigned to the admitted pupil.

1. Click the **Pre-Admission Pupil** cell to display the data for that pupil/student as shown in following graphic.

CTF Pupil Details		Pre-Admission Pupil Details		Edit Pupil
Names	Details	Names	Details	
UPN	N919467903128	UPN	N919467903128	
Former UPN		Former UPN		
Surname	Aboud	Surname	Aboud	
Former Surname		Former Surname		
Forename	Dorman	Forename	Dorman	
DOB	20/02/2000	DOB	20/02/2000	
Gender	M	Gender	M	
		Mismatch		

The graphic shows that UPNs match and the pre-admission UPN needs to be removed.

2. Right-click the **Edit Pupil** link on the right-hand side of the page then select **Go to Browser** to display the **Find Application** browser.
3. Search for and highlight the required pupil/student (Dorman Aboud in this example) then click the **Delete** button in the browser to delete the record.
4. Once the record has been deleted, click the **Back** button to return to the **Match and Import** panel and click the **Refresh** button to remove Dorman Aboud from the **Pre-Admission Pupil** column and allow the UPN to be imported against the admitted record upon import of the CTF.

There are two panels at the bottom of the **Import and Match** panel. The first panel contains information about the CTF pupil/student that is taken from the CTF file. These include:

- UPN
- Former UPN
- Surname
- Former Surname
- Forename
- DOB
- Gender.

When you select a different pupil/student, the **CTF Pupil Details** panel changes.

The details in the second panel will differ depending on what cells you select.

If the pupil/student selected does not have any conflicting errors with SIMS, the following graphic is displayed.

CTF Pupil Details			
Names	Details	Details	
UPN	N919467903128	No data found.	
Former UPN			
Surname	Aboud		
Former Surname			
Forename	Dorman		
DOB	20/02/2000		
Gender	M		

11 | Importing and Exporting CTFs

If the pupil/student selected has conflicting errors with SIMS then the **Error found for CTF Pupil** panel will be displayed.

CTF Pupil Details		Error found for CTF Pupil		Edit Pupil
Names	Details	Names	Details	
UPN	E823432111004	Andrew_Abbot	UPN (E823432111004) not imported because it already exists for pupil Abbot, Andrew	
Former UPN				
Surname	Aboud			
Former Surname				
Forename	Dorman			
DOB	20/02/2000			
Gender	M			

If the pupil/student selected in the **Selected Pupil** column is admitted or has ever been admitted, the **Matched On-Roll Pupil Details** will be displayed.

CTF Pupil Details		Matched On-Roll Pupil Details		Edit Pupil
Names	Details	Names	Details	
UPN	Q823432111003	UPN		
Former UPN		Former UPN		
Surname	Abbot	Surname	Abbot	
Former Surname		Former Surname		
Forename	Benjamin	Forename	Benjamin	
DOB	20/07/2000	DOB	20/07/2000	
Gender	M	Gender	M	
		Mismatch		

If you select a pupil/student in the **Selected Pupil** column and they are a pre-admission pupil then the **Matched Pre-admission Pupil Details** will be displayed.

CTF Pupil Details		Matched Pre-Admission Pupil Details		Edit Pupil
Names	Details	Names	Details	
UPN	V823432114001	UPN		
Former UPN		Former UPN		
Surname	Abbot	Surname	Abbot	
Former Surname		Former Surname		
Forename	Francis	Forename	Francis	
DOB	23/03/2005	DOB	23/03/2005	
Gender	M	Gender	M	
		Mismatch		

If you select a pupil/student in the **Pre-Admission Pupil** column then the **Pre-Admission Pupil Details** box will be displayed.

CTF Pupil Details		Pre-Admission Pupil Details		Edit Pupil
Names	Details	Names	Details	
UPN	N919467903128	UPN	N919467903128	
Former UPN		Former UPN		
Surname	Aboud	Surname	Aboud	
Former Surname		Former Surname		
Forename	Dorman	Forename	Dorman	
DOB	20/02/2000	DOB	20/02/2000	
Gender	M	Gender	M	
		Mismatch		

If you select a pupil/student in the **Admitted Pupil** column then the **On-Roll Pupil Details** box will be displayed.

CTF Pupil Details		On-Roll Pupil Details	
Names	Details	Names	Details
UPN	A23432110001	UPN	B123432110001
Former UPN		Former UPN	
Surname	Carson	Surname	Carson
Forename	Stephen	Forename	Stephen
DOB	02/12/1998	DOB	02/12/1998
Gender	M	Gender	M
		Error found	NOT IMPORTED - UPN (B123432110001) mismatch

Running the Pre CTF Import Report

The Pre CTF Import Report can be run to indicate what exactly will happen if you decide to import the CTF.

Pre CTF Import Report - General

This report is designed to show the results should user decide to import the CTF. Once the user is satisfied with the report the 'Import CTF' button can be selected.

Security Message: This report contains sensitive information.

CTF Filename: D:\CTFs\2015\9194679_CTF_8234321_002.xml

Total Pupils: 3
 New Pupils: 0
 Updated Pupils: 3
 Not Imported Pupils: 0

New Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender
-	-	-	-	-	-

Updated Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
-	-	-	-	-	-	-	-	-

Updated Pre-Admission Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
Aboud	-	Dorman	N919467903128	20/02/2000	M	Aboud	-	Dorman
Acoba	-	Ekwueme	P919467903312	09/01/2001	M	Acoba	-	Ekwueme
Acton	-	Vinal	B919467902887	25/12/1997	M	Acton	-	Vinal

Not Imported Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	Error Message
-	-	-	-	-	-	-

Importing the CTF

- When you are satisfied with the selections that you have made, you can import the CTF by clicking the **Import CTF** button to begin the file import. Prior to importing a CTF, a message prompts you to check with the System Manager whether the Address Tidy and Merge routine has been run.
- To continue with the import, click the **Yes** button. To cancel the process so that you can check with the System Manager, or to run the Tidy and Merge routine prior to CTF import, click the **No** button.

New pupil/students are given an enrolment status of **Single Registration** by default, which can be subsequently changed through the **Pupil (or Student) Details** page at a later date if required. If pupil/students are imported into a preadmission group, they have a status of **Admitted** by default.

11 | Importing and Exporting CTFs

An additional panel is displayed on the **Import CTF** page entitled **Edit Current Imported Students**. This panel allows basic information to be viewed and if required, the **Enrolment Status** can be edited by clicking in the required cell and then selecting the required status from the drop-down list. This panel is displayed only if new pupil/students are imported into SIMS.

5 Edit Current Imported Students

UPN	Legal Surname	Legal Forename	Gender	DOB	Admission No.	Enrolment Status
B919467902687	Acton	Vinal	M	25/12/1997	004830	Single Registrati...
N919467903128	Aboud	Dorman	M	20/02/2000	004828	Single Registration
P919467903312	Acoba	Ekwueme	M	09/01/2001	004829	Single Registration

Save

The CTF is imported and the CTF Import Report is displayed, which explains what happens to the CTF pupil/student record once it is imported into SIMS. The report is saved in the Import CTF directory.

CTF Import Report - General

Security Message: This report contains sensitive information.

CTF Filename: D:\CTFs\2015\9194679_CTF_8234321_002.xml

Date Imported: 20/02/2015

Total Pupils: 3 New Pupils: 0 Updated Pupils: 3 Not Imported Pupils: 0

New Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender
-	-	-	-	-	-

Updated Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
-	-	-	-	-	-	-	-	-

Updated Pre-Admission Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
Aboud	-	Dorman	N919467903128	20/02/2000	M	Aboud	-	Dorman
Acoba	-	Ekwueme	P919467903312	09/01/2001	M	Acoba	-	Ekwueme
Acton	-	Vinal	B919467902687	25/12/1997	M	Acton	-	Vinal

Not Imported Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	Error Message
-	-	-	-	-	-	-

Once the CTF file has been imported, the Exception Log panel is displayed. This panel provides information on any errors that occurred during the import of the CTF file.

3. Click the **Save** button to keep your changes.
4. Once imported, it is advisable to check the details of each imported pupil/student.



Additional Resources:

Tidying Address Data in the *Housekeeping Routines* chapter of the *Setting up and Administering SIMS* handbook



More Information:

Viewing the CTF Import Exception Log on page 329

Printing/Saving the CTF Import Exception Log on page 327

Printing / Saving the CTF Import Exception Log

The Exception Log can be printed by clicking the **Print** button. Alternatively, it can be saved as a .txt file by clicking the **Save** button.

Viewing the CTF Import History Log

The CTF Import History Log provides a log of the CTF files that have previously been imported within a given timeframe. The log includes the **Date**, **Sending School**, **School No.**, **File Name**, **No of Pupils in File** and the **No. of Pupils Added**. This can be particularly useful if you are not sure whether a particular CTF file has already been imported.

1. Select **Routines | Data In | CTF | View Import History Log** to display the **View Import History Log** page.

Date	Sending School	School No	Filename	No of Pupils in File	No of Pupils Added
20/02/2015	Prester School Masked English Secondary	4679	L:\Transfer\For lasmi\CTF reports\91...	3	3

2. Specify the timeframe within which the CTFs were imported by entering the **Start** and **End dates** or clicking the **Calendar** buttons and selecting the required dates. The dates default to today.
3. Click the **Search** button to display a list of import logs that fall within the date range specified.

11 | Importing and Exporting CTFs

- Click the **Preview** button to view a copy of the CTF report in Microsoft® Word which can be printed or saved as required.

Import Report		Report Generated 20/02/2015

Date Imported	20 Feb 2015	
FileName	9194679_CTF_8234321_002.xml	
School Code	4679	
School	Prester School Masked English Secondary	
Address		
Phone		
Pupils in File	3	
Pupils Added	3	

The report lists all the CTFs imported within the selected timeframe together with the date imported, file name, school code, school, address, phone number, the number of pupil/students in the file and the number of pupil/students added to the system.

- Click the **Contacts Report** button to run a report in your web browser. This report shows the contacts of new or existing pupil/students or applicants that have been imported through a CTF.

Contacts imported into SIMS by CTF Import				
Import Date	20/02/2015			
Import Filename	D:\CTF reports\9194679_CTF_8234321_002.xml			
Source School name	Prester School Masked English Secondary			
Source School number	4679			
Number of pupils imported	3			
Contacts linked to Students				
No contacts were imported and linked to students in this CTF import				
Contacts linked to Applicants				
Contact Name	Applicant Name	Applicant Date of Birth	Applicant Gender	Contact Address
Bidell, Faith	Acton, Vinal	25/12/1997	Male	21, Langur St., Vincennes, West Lothian, B92 9ZB
Cyz, Fulvio	Acton, Vinal	25/12/1997	Male	7, Hillcrest St., Grant, B79 8JD
Kearns, Russell	Acton, Vinal	25/12/1997	Male	232, Leiby Ave., The Headlands, Downton, Las Vegas, West Midlands, AL6 0AU
Meyering, Caesar	Aboud, Dorman	20/02/2000	Male	80, Cogburn Ridge Ave., Brookeville, Anglesey, AB42 4JL
Mueller, Carmella	Acton, Vinal	25/12/1997	Male	21, Langur St., Vincennes, West Lothian, B92 9ZB
Orlinsky, Agnes	Aboud, Dorman	20/02/2000	Male	80, Cogburn Ridge Ave., Brookeville, Anglesey, AB42 4JL

IMPORTANT NOTE: If the CTF import you have chosen was generated before the SIMS 2015 Spring Release, the Contacts Report will be blank but that does not necessarily mean that no contacts were imported by that import.

Viewing the CTF Import Exception Log

Existing information stored in SIMS is deemed to be the most up to date and is therefore not overwritten by the content of the CTF. Any data anomalies identified during the import are recorded in the **Exception Log**.

4 Exception Log						
Number of students in file: 61		Number of students processed: 61		Number of students not exported: 0		
UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	The 9th point for FSP CLL AS1 has b...	8232999_CTF_8234321_011
T820200106073	Davis	Jean	F	07/01/2004	The 9th point for FSP PSE AS3 has ...	8232999_CTF_8234321_011
J820432100043	Elliot	Gadry	M	04/01/2005	Attendance data not exported as miss...	8232999_CTF_8234321_011
F820200106083	Jones	Joe	M	17/05/2004	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_011
C820200106081	Mugarisanwa	Sylvia	F	26/11/2003	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011

The following information is displayed:

- **Number of children in file:** indicates the total number of pupil/students in the CTF file.
- **Number of children processed:** indicates the number of pupil/students contained in the newly imported CTF file who have been successfully processed by the system.
- **Number of new children:** This indicates the number of new pupil/students that the system has identified within the CTF file you have just imported.

Any children that the system has identified as having data anomalies are displayed together with their **UPN**, **Legal Surname**, **Legal Forename**, **Gender**, **Date of Birth** and an **Error Description** detailing the nature of the problem.

The following are common causes of import errors:

- missing core data
- missing or invalid UPNs
- data already exists

Any errors must be corrected before the pupil/student can be successfully imported.

Exporting CTFs

When pupil/students leave your school to attend another school, it is your responsibility to ensure that all available details are passed on to the new school. If you are a feeder school, you probably have a large number of pupil/students leaving at the same time, to the same destination school. It is standard practice to create a CTF for export to each of the destination schools.

One CTF file is created per destination school or Local Authority. However, it is possible to create up to six CTF files in one Export CTF process in SIMS, i.e. you can select up to six destination schools and/or Local Authorities.

Once generated, the CTF can be transferred by School to School (<https://www.gov.uk/guidance/school-to-school-service-how-to-transfer-information>) or other local secure file transfer mechanisms. Please check with your Local Authority if you are unsure which method to use.

Before Exporting a CTF

Before exporting CTFs you must ensure that:

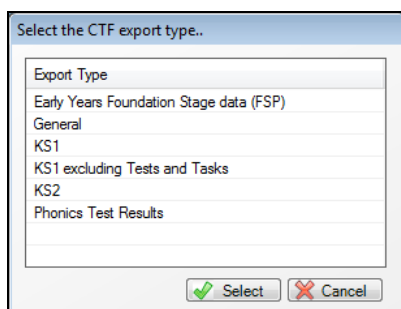
- the CTF configuration defaults have been set up via **Tools | Setups | CTF**. Please refer to the *Setting Up CTF Configuration Defaults* section in the *Setting Up and Administering SIMS* handbook.
- the destination schools are defined in your system via **Tools | Setups | Other Schools**.
- alternative destinations have been set up in **Tools | Setups | CTF**. These include unknown destinations (XXXXXXX), destinations for those moving outside the maintained sector (e.g. MMMMMMM) and/or for the NAA (e.g. NAALLL).

IMPORTANT NOTE: You are strongly advised to run the Address Tidy and Merge routine before importing or exporting a CTF to reduce the number of potential issues with regard to address matching.

Selecting the Data to be Exported

The Core data (UPN, Surname, Forename, Gender and Date of Birth) is mandatory and is always exported.

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



This dialog enables you to create the following types of CTF:

- Early Years Foundation Stage data (FSP)** - exports data relating to Early Years Foundation Stage pupils, enabling the results of the statutory Profile Aspects or Learning Goals that have been achieved by pupils to be transmitted to destination schools and LAs.
- General** - produces a full CTF export file.
- KS1** - creates a CTF file that contains information relating to Key Stage 1 results for pupil/students.
- KS1 excluding Tests and Tasks** - exports Key Stage 1 data that do not include information for pupil/students' Tests and Tasks.
- KS2** - exports a CTF file that contains information relating to Key Stage 2 results for pupil/students.
- Phonics Test Results** - generates a CTF file for pupil/students who have Phonics Test Results data recorded. This type of CTF contains minimal tags.

NOTES: Additional options are enabled for schools in England to comply with the Children Missing in Education legislation. The **CME - Leavers** option enables a school to create a CML file that should be sent to a school's Local Authority when a pupil/student leaves school outside of what the Local Authority considers to be a normal phase transfer. The **CME - Joiners** option enables a school to create a CMJ file that should be sent from a school to their Local Authority when a pupil/student physically arrives in a school outside of what the Local Authority considers to be a normal phase transfer. Local Authorities can also request that these files be sent to them for pupil/students moving as part of a normal phase transfer.

Secondary schools in England are provided with additional options. The **ULN Request** option generates a CTF file for students who do not have a Unique Learner Number (ULN). This type of CTF contains minimal tags.

Secondary schools in Wales are provided with additional options. The **Welsh National Tests (WNT)** option exports students' National Test result data.

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

NOTE: If **CME - Leavers**, **CME Joiners**, **ULN Request** or **Phonics Test Results** is selected, the **Data to be Exported** panel is not displayed in the following dialog.

Export CTF (General)

1 Data to be Exported 2 Student Options 3 Students 4 Exception Log

1 Data to be Exported

Student Basic Details	☒	Student Address	☒	Student Contacts	☒	Looked After	☒
SEN Information	☒	Assessment Data Include KS1 Tasks/Tests	☒	School History	☒	External Exam Results	☒
Attendance Summary	☒	Programme of Study (PoS) Assessments	☒	FSM History	☒		

2 Student Options

Effective Date: 07/12/2015 View Current students Include students already exported ☒ Refresh Students

3 Students

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
N823432113104	Abbess	Graham	8A	8	8	Rhonda Cynon Taff		
B823432110001	Abbey	Grenetta	11F	11	11	Green Abbey School		
B820432109001	Abbey	Jimmy	G	13	13			
C823432113105	Abbey	Sean	8B	8	8	Rhonda Cynon Taff		
E823432111004	Abbot	Andrew	10E	10	10			
Q823432111003	Abbot	Ben	11A	11	11			
Q820432109002	Abbot	Susan	L	13	13			
U823432111005	Able	Cameron	10A	10	10			
Q823432110002	Abrahams	Jacqui	11B	11	11	Green Abbey School		
H823432111006	Ackrington	Robert	10D	10	10			
J820200107001	Ackton	Bill	11A	11	11	Green Abbey School		
M820200105001	Ackton	Stan	9A	9	9			
M820200105060	Acton	Jordan	7F	7	7			

Export CTF

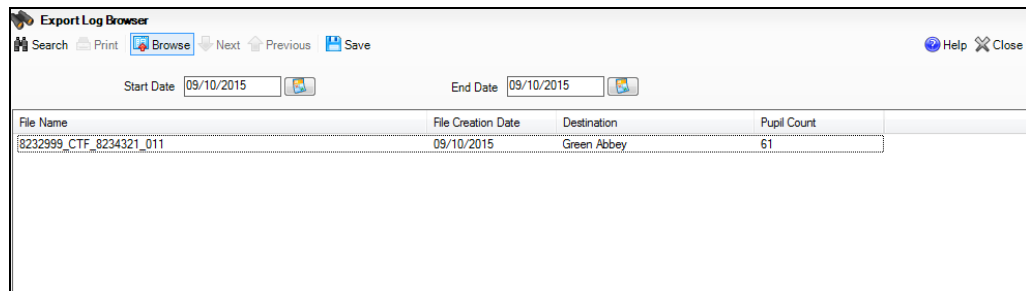
- The data that is exported by default (as defined in **Tools | Setups | CTF**) is shown by the selected check boxes in the **Data to be Exported** panel. Amend this default data if required by selecting/deselecting any of the check boxes.

TIP: Hover the mouse over each check box to view a list of the data in each section, as shown in the following graphic.

Viewing the CTF Export History Log

The CTF Export History Log provides a log of the CTF files that have previously been exported within a given timeframe. The log includes the **File Name**, **Creation Date**, **Destination** and **Pupil Count**.

1. Select **Routines | Data Out | CTF | View Export History Log** to display the **Export Log** browser.



The screenshot shows the 'Export Log Browser' window. It has a toolbar with buttons for Search, Print, Browse (highlighted), Next, Previous, and Save. There are also Help and Close buttons. Below the toolbar, there are input fields for 'Start Date' and 'End Date', both set to '09/10/2015'. Below these fields is a table with the following data:

File Name	File Creation Date	Destination	Pupil Count
8232999_CTF_8234321_011	09/10/2015	Green Abbey	61

2. Specify the timeframe in which the CTFs were exported by entering the **Start Date** and **End Date** or by clicking the **Calendar** buttons and selecting the required dates. These dates default to today's date.
3. Click the **Search** button to display a list of export logs that fall within the date range specified.

- Highlight the required file and then click the **Preview** button to view a copy of the CTF report in Microsoft® Word, which can be printed or saved as required.

EXPORT HISTORY REPORT

DESTINATION SCHOOL DETAILS: Bedfordshire
820 /

TELEPHONE NUMBER:

FAX NUMBER:

EMAIL:

FILENAME: 8202001_CTF_820LLLL_001

NAME	UPN	DATE OF BIRTH	GENDER
Ackroyd, Marcus	T820200100036	21 Jan 1996	M
Addison, Millie	H820200100001	28 Apr 1996	F
Agathocleous, Joe	Z820200105076	18 Jun 2001	M
Ahmad, Carina	E820200104003	01 Sep 2000	F
Allcroft, Catherine	V820200100020	21 Dec 1996	F
Allim, Farah	N820200105077	27 Dec 2000	F

The report lists details of the destination school (or Local Authority) together with the name, UPN, date of birth and gender of the pupil/students included in the CTF. Details of the sending school are provided in the footer of the document and include the user name, number of pages, source school name and address.

Choosing the Pupil / Student Group

- Select the **Effective Date** using the **Calendar** button in the **Pupil (or Student) Options** panel. This date must fall within the current academic year, and governs the cut-off point for the exclusion of the selected pupil/students, based on the **View** settings (see step 2 for more information).
- Select the type of pupil/students to be included in the CTF file from the **View** drop-down list, e.g. **Leavers this year**. The selection made here governs the impact of the selected **Effective Date**.

View	Current students
	Current students
	Leavers this year
	Leavers previous academic year
ore..	F Leavers previous years
	Current and Leavers this year
	All

11 | Importing and Exporting CTFs

It is possible to place on-roll pupil/students and leavers in the same CTF file. This is useful when sending end of Key Stage results to the National Assessment Agency. To do this, select **Current and Leavers this year** from the **View** drop-down list.

*NOTES: Selecting **All** from the **View** drop-down list displays all students, and therefore the **Effective Date** filter is not applicable.*

*Selecting **Leavers previous years** displays all students who have left your school in all previous years, and therefore the **Effective Date** filter is not applicable.*

3. Pupil/students who have already been included in previously created CTFs do not appear in the list by default. If you wish to include these pupil/students, select the **Include Students Already Exported** check box.
4. Click the **Refresh Students** button to update the list of pupil/students displayed, based on your selections.

For example, if you select an **Effective Date** of **8/10/2015** and a **View** of all **Current Students**, then clicking the **Refresh Students** button updates the list to display all pupil/students who were on-roll at your school from the beginning of the academic year to 8 October 2015.

*NOTE: Schools in England that selected to produce a ULN Request/Update CTF will be presented with the **ULN** column in the following display.*

2 Student Options
 Effective Date: 08/10/2015 View: Current students Include students already exported: ☒ Refresh Students

3 Students

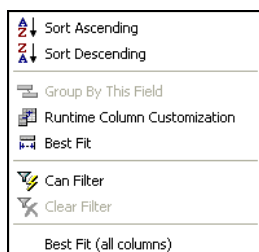
UPN	Preferred Sur...	Preferred Fore...	R...	Y...	Year...	Previous Desi...	Destination LA/...	Destination Sc...
X919467903...	Abad	Liesl		10				
N82343211...	Abbess	Graham	8A	8	8	Rhondda Cyno...		
B823432110...	Abbey	Grenetta	11F	11	11	Green Abbey S...		
B820432109...	Abbey	Jimmy	G	13	13			
C82343211...	Abbey	Sean	8B	8	8	Rhondda Cyno...		
E823432111...	Abbot	Andrew	10E	10	10			
Q82343211...	Abbot	Ben	11A	11	11			
Q82043210...	Abbot	Susan	L	13	13			
H91946798...	Abdelah	Carroll		8				
U82343211...	Able	Cameron	10A	10	10			
N91946790...	Aboud	Dorman		11				
Q82343211...	Abrahams	Jacqui	11B	11	11	Green Abbey S...		
H82343211...	Ackrington	Robert	10D	10	10			

Changing the **View** to **Current and Leavers this year** and clicking the **Refresh Students** button displays a list of all pupil/students who were on-roll, and all pupil/students who left your school, from the beginning of the academic year to 8 October 2015.

Changing the **View** to **Leavers previous years** and clicking the **Refresh Students** button displays a list of all pupil/students who left in all previous academic years, regardless of the **Effective Date**.

Filtering and Sorting the Pupil/Student View

Once the required group of pupil/students are listed, it is then possible to filter and sort the list based on your requirements. There are a number of filtering and sorting options that can be selected by right-clicking in the heading of each column as follows:



Sort Ascending	Sorts the grid in ascending order based on the selected column (e.g. right-clicking the Surname column heading sorts in Surname ascending order, i.e. A-Z). This can also be achieved by clicking column headings – click once for ascending and again for descending order.
Sort Descending	As previous, but in descending order, i.e. Z-A.
Best Fit	Sizes the selected column to fit the contents.
Can Filter	Allows you to filter the rows that are displayed based on a value selected from the column. For example, right-clicking the Year Grp column and selecting Can Filter from the pop-up menu adds a down arrow to the column heading (if this is not already visible). Clicking this down arrow displays a drop-down list of all the values (such as each of the available years) in the column. Select the required value to filter the list based on the value, such as displaying Year 6 only, as shown in the following graphic: NOTE: The presence of a down arrow in a column heading indicates that filtering is possible. You can switch on filtering (if an arrow is not visible) by right-clicking the column heading and selecting Can Filter, as previously described.
Clear Filter	Removes any filter applied.
Best Fit (all columns)	Sizes all columns to fit the contents.

Specifying the Destination Local Authority or the Destination School

It is possible to select the destination Local Authority or the destination school for individual pupil/students, or manually select a group of pupil/student and select the same destination Local Authority or destination school for that group. A CTF file is created for each destination school or Local Authority.

NOTES: It is possible to select up to six schools or Local Authorities in only one export CTF process. You therefore need to repeat this process if more than six are required.

For Individual Pupil/Students

To select a value for an individual pupil/student, click the far right-hand side of the cell in the **Destination LA/Other** or **Destination School** column and select the required value from the drop-down list.

*NOTES: To enable the transfer of CTF files between parallel systems when trialling new applications, you can now select your own school's name from the **Destination School** drop-down list.*

*To facilitate the selection of the correct school where there are multiple similarly named schools, the **Destination School** drop-down list now displays the school name, the LA Number and the Establishment Number (or the DENI Number for schools in Northern Ireland).*

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Bedfordshire (Pre LGR 09)	
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey		Abbots Barton Primary School 826219
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey		England ENGENG
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey		Green Abbey 8234321
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey		Harbour View Primary 8653421
J820200109003	Adams	Adam	6VC	6	6	Green Abbey		Parkside Playgroup 9074321
G823299915001	Adams	Nancy	PM	N2	N2			Portfields Combined School 9372805
P823299911021	Akeman	Rebecca	3TO	3	3	Green Abbey		
K823299914002	Akeman	Steven	ELM	R	R			
H823299915021	Alamilla	Sofia	PINE	R	R			
Y820200107002	Anderson	Neo	6KH	6	6	Green Abbey		
M823200110005	Ansell	Alfie	5BB	5	5	Green Abbey		
B823200110006	Ansell	Archie	5BB	5	5	Green Abbey		

For Groups of Pupil/Students

To select the same value for all the pupil/students in a column:

- Click to highlight any individual cell in either the **Destination LA/Other** or **Destination School** column, as required. Right-click anywhere on the grid and choose **Select All** from the pop-up menu.

Destination LA/Other	Destination School
Avon (Pre Lgr)	
Select All	

This highlights the remaining rows in blue (i.e. the chosen column remains white).

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/...	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Avon (Pre Lgr)	
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey		
N823299911001	Abdullah	Tamwar	2JB	2	2	Green Abbey		
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey		
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey		
	Abraham	Jane	6KH	6	6			
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey		
J820200109003	Adams	Adam	6VC	6	6	Green Abbey		
K823200110081	Adams	Laura	4ES	4	4	Green Abbey		
G823299915001	Adams	Nancy	PM	N2	N2			
P823299911021	Akeman	Rebecca	3TO	3	3	Green Abbey		
W823299914001	Akeman	Richard	ELM	R	R			
K823299914002	Akeman	Steven	ELM	R	R			

- Click the down arrow in the data entry column (which has a white background) and select the required value, e.g. **Avon (Pre Lgr)**.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/...	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Avon (Pre Lgr)	
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey	Avon (Pre Lgr)	
N823299911001	Abdullah	Tamwar	2JB	2	2	Green Abbey	Avon (Pre Lgr)	
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey	Avon (Pre Lgr)	
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey	Avon (Pre Lgr)	
	Abraham	Jane	6KH	6	6		Avon (Pre Lgr)	
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey	Avon (Pre Lgr)	
J820200109003	Adams	Adam	6VC	6	6	Green Abbey	Avon (Pre Lgr)	
K823200110081	Adams	Laura	4ES	4	4	Green Abbey	Avon (Pre Lgr)	
G823299915001	Adams	Nancy	PM	N2	N2		Avon (Pre Lgr)	
P823299911021	Akeman	Rebecca	3TO	3	3	Green Abbey	Avon (Pre Lgr)	
W823299914001	Akeman	Richard	ELM	R	R		Avon (Pre Lgr)	
K823299914002	Akeman	Steven	ELM	R	R		Avon (Pre Lgr)	

Once selected, the entire column is populated with the selected value.

To select values for specific pupil/students:

- To select randomly ordered pupil/students, hold down the **Ctrl** key and click the row of each required pupil/student to highlight them. Release the **Ctrl** key and then click the down arrow of the last highlighted cell (which has a white background) and select the required value.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/...	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Avon (Pre Lgr)	
J820200109032	Aaron	Liz	5DT	5	5	Green Abbey		
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey		
N823299911001	Abdullah	Tamwar	2JB	2	2	Green Abbey		
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey		
Z823299913002	Abhra	Alisha	PINE	1	1	Green Abbey		
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey		
	Abraham	Jane	6KH	6	6		Avon (Pre Lgr)	
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey	Barking & Dagenham	
J823200110003	Ackton	Stephen	5BB	5	5	Green Abbey	Barnet	
J820200109003	Adams	Adam	6VC	6	6	Green Abbey	Barnet	
K823200110081	Adams	Laura	4ES	4	4	Green Abbey	Bath & North East Somerset	
G823299915001	Adams	Nancy	PM	N2	N2		Bedford Borough	

11 | Importing and Exporting CTFs

- To enter values for sequentially listed pupil/students, click the first pupil/student, hold down the **Shift** key, then click the last required pupil/student in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key). The selected cells are highlighted in blue. Release the **Shift** key, then click the down arrow of the last highlighted cell (which has a white background) and select the required value.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Avon (Pre Lgr)	
J820200109032	Aaron	Liz	5DT	5	5	Green Abbey		
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey		
N823299911001	Abdullah	Tamwar	2JB	2	2	Green Abbey		
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey		
Z823299913002	Abhra	Alisha	PINE	1	1	Green Abbey		
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey		
	Abraham	Jane	6KH	6	6			
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey		
J823200110003	Ackton	Stephen	5BB	5	5	Green Abbey		
J820200109003	Adams	Adam	6VC	6	6	Green Abbey		
K823200110081	Adams	Laura	4ES	4	4	Green Abbey		
G823299915001	Adams	Nancy	PM	N2	N2			

NOTES: To enable the transfer of CTF files between parallel systems when trialling new applications, you can now select your own school's name from the **Destination School** drop-down list.

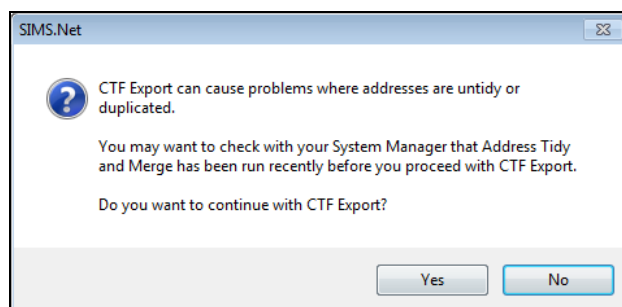
To facilitate the selection of the correct school where there are multiple similarly named schools, the **Destination School** drop-down list now displays the school name, the LA Number and the Establishment Number (or the DENI Number for schools in Northern Ireland).

Creating the CTF Export File(s)

- Once you have completed selecting the **Destination LA/Other** or **Destination School** for the required pupil/students, click the **Export CTF** button.

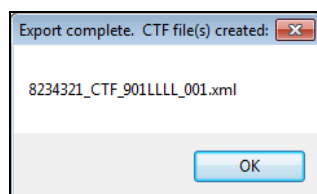
Prior to exporting a CTF, a message prompts you to check with the System Manager whether the Address Tidy and Merge routine has been run.

- To continue with the export, click the **Yes** button. To cancel the process in order to check with the System Manager, or to run the Tidy and Merge routine prior to CTF export, click the **No** button.



The CTF file(s) are now created, one for each destination school and Local Authority specified previously (up to a maximum of six).

- Once the CTF has been created, a message is displayed. The name of the CTF created is also displayed.



- Click the **OK** button to complete the process.



Additional Resources:

Tidying Address Data in the Housekeeping Routines chapter of the *Setting Up and Administering SIMS* handbook

Viewing the CTF Export Exception Log

Any errors are displayed in the **Exception Log** panel:

4 Exception Log						
Number of students in file: 61		Number of students processed: 61		Number of students not exported: 0		
UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	The 9th point for FSP CLL AS1 has b...	8232999_CTF_8234321_011
T820200106073	Davis	Jean	F	07/01/2004	The 9th point for FSP PSE AS3 has ...	8232999_CTF_8234321_011
J820432100043	Elliott	Gadry	M	04/01/2005	Attendance data not exported as miss...	8232999_CTF_8234321_011
F820200106083	Jones	Joe	M	17/05/2004	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_011
C820200106081	Mugarisanwa	Sylvia	F	26/11/2003	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011

The following information is displayed:

- Number of Pupil (or Students) in file:** indicates the total number of pupil/students in the CTF file.
- Number of Pupil (or Student) processed:** indicates the number of pupil/students contained in the newly exported CTF file who have been successfully processed by the system.
- Number of Pupil (or Student) not exported:** This indicates the number of new pupil/students that were not included in the CTF file you have just exported.

Any pupil/students that the system has identified as having data anomalies are displayed together with their **UPN**, **Surname**, **Forename**, **Gender**, **Date of Birth**, an **Error Description** detailing the nature of the problem and **File Name**.

The following are common causes of import errors:

- missing core data
- missing or invalid UPNs
- data already exists

Some errors are for information only. If there is a figure in the **Number of students not exported** field then the appropriate error must be corrected before the pupil/student(s) can be successfully included in the CTF export file.

Printing / Saving the CTF Export Exception Log

The Export Exception Log can be printed by clicking the **Print** button. Alternatively, it can be saved as a .txt file by clicking the **Save** button.

Sending / Transferring the CTF file

Navigate to the location of the **CTF Export Directory** as defined in **Tools | Setups | CTF** and identify the newly created XML file for export.

Name	Date modified	Type	Size
 8232999_CTF_8234321_011.xml	09/10/2015 10:39	XML Document	3,095 KB

The first seven digits of the file name represent your Local Authority number and your establishment number (as the sending school). The other seven digits represent the destination school's Local Authority number and establishment number.

*NOTE: Over time, a number of files may be created that are destined for the same school and Local Authority. As a consequence, the file names may have the same name. If this is the case, the most recent file created can be identified by the **Date Modified**.*

Once generated, the CTF can be transferred by School to School (<https://www.gov.uk/guidance/school-to-school-service-how-to-transfer-information>) or other local secure file transfer mechanisms. Please contact your Local Authority if you are unsure which method to use.

12 | Recording Leavers and Deleting Pupil/Student Records

Deleting Pupil/Students	341
Recording Leavers	345

Deleting Pupil/Students

You must be a member of the *School Administrator* user group in System Manager to delete a pupil/student record.

IMPORTANT NOTE: *This process is irreversible and is only for deleting erroneous records. You may wish to carry out a backup before proceeding. This process should not be used for pupil/students who are leaving the school or have been permanently excluded.*

A pupil/student should be deleted only if:

- they have been entered in error.
- their record is a duplicate.
- they have been recorded as on-roll prior to their arrival, but they subsequently choose to attend another school.

When a pupil/student is deleted, all their associated records are completely removed from the system, including any documents attached to their record (such as letters, medical notes, etc.).

NOTE: *If you are deleting a duplicate record, ensure that (if necessary) any required data is added to the record you intend to keep.*

It is not possible to delete a pupil/student if they have any of the following details recorded against them:

- Examination Entries
- Education Maintenance Allowance
- CONNEXIONS record

12 | Recording Leavers and Deleting Pupil/Student Records

1. Select **Routines | Pupil (or Student) | Delete Pupil (or Student)** to display the **Locate Student** browser.

Name	Gender	Dob	Admission Number
Aaron, Chris	Male	01/09/2005	001102
Aaron, Liz	Female	01/09/2005	001103
Aaron, Sophie	Female	01/09/2005	001104
Abdullah, Tamwar	Male	12/01/2008	001275
Abhra, Abjit	Male	20/11/2009	001336
Abhra, Alisha	Female	20/11/2009	001337
Abhra, Neel	Male	20/11/2009	001338
Abraham, Jane	Female	19/05/2005	001041
Ackton, Stan	Male	22/03/2010	001339
Ackton, Stanley	Male	18/12/2001	000842

2. Search for the pupil/student to be deleted by entering any combination of their **Surname**, **Forename** or **Admission Number**, or select their **Gender** from the drop-down list, then click the **Search** button.
3. Highlight the required pupil/student then click the **Open** button to view their details. There may be a slight delay while the system gathers their associated records. The following message is displayed during this process.

Delete Student - Paige Stones

✕ Delete 🖨️ Print 🔄 Cancel

1 Current Details 2 Data Summary 3 Dinner Money Data (4 records) 4 AD Provisioning Data (1 records) 5 Attendance Data (1537 records)

The System is gathering the information on the selected student
You will have the opportunity to review and print this information
to help you decide if this is the student you wish to delete
please wait

The **Current Details** are displayed together with a **Data Summary** which lists whether the pupil/student can be deleted and shows the number of associated records that will be removed.

The following categories of data are reported on:

- Curriculum Data (including timetable and classes)
- Performance Data (including assessments, exam entries and results)
- Returns and Transfers Data
- Concessions Data
- Behaviour Data
- Exclusions Data
- SEN Data
- Student Basic Data

- Attendance Data (including attendance and lesson marks).

Delete Student - Eliza Kalinski
Delete Print Cancel

1 Current Details 2 Data Summary 3 AD Provisioning Data (1 records) 4 Attendance Data (826 records) 5 Student Basic Data (11 records) 6 Returns and Transfers Data (3 records) 7 Curriculum Data (2 records)

1 Current Details

Name : Eliza Kalinski

Gender : Female Date of Birth : 12/11/2011

Latest Admission 01/09/2015 -> Current

Year : N2

Class AM



2 Data Summary

This student can be deleted

This Student has Curriculum Data (2 records)	This Student has Attendance Data (826 records)
This Student has no Performance Data	This Student has no EMA Data
This Student has Returns and Transfers Data (3 records)	This Student has no Alerts Data
This Student has no Concessions Data	This Student has AD Provisioning Data (1 records)
This Student has no Behaviour Data	This Student has no Partnership Data
This Student has no Exclusions Data	This Student has no Dinner Money Data
This Student has no Fees Billing Data	This Student has no Homework Data
This Student has no SEN Data	This Student has no System Manager Data
This Student has Student Basic Data (11 records)	

3 AD Provisioning Data (1 records)

If specific data is available within a category, an individual section is displayed on the page as shown in the following graphic.

5 Student Basic Data (11 records)
View

12 | Recording Leavers and Deleting Pupil/Student Records

Click the **View** hyperlink to review the detailed information within the category if required.

5 Student Basic Data (11 records)
[Close](#)
Basic details

Full Name	Legal Surname	Chosen Forename	D.O.B.	Age	Gender
Eliza Kalinski	Kalinski	Eliza	12-11-2011	4	Female

Addresses

Type	Address	From	To
(Home)	7a ,Day's Lane, Biddenham, Be...	24-04-2015	

Student Identifiers

Local UPN	UPN	ULN	Ever had Pupil Premium
	Y823299915013		No

Family/Home Information - Contacts

Priority	Contact Name	Relationship with Student	Court Order	Telephone
1	Mr Alexander Kalinski	Father		01632 788913
1	Mrs Aniya Kalinski	Mother		01632 788913

Family/Home Information - Parents

Parental Salutation	Parental Addressee	Mailing Point
Mr and Mrs Kalinski	Mr and Mrs A Kalinski	Yes

Medical Information

Medical Practice	Emergency Consent	NHS Number
Queens Park Surgery	No	

NOTE: If there is no information for a particular category, that category is not displayed.

- It is advisable to print the contents of the **Delete Pupil** (or **Student**) page for future reference by clicking the **Print** button on the toolbar.

NOTE: Each category is automatically expanded before printing to ensure the printout contains all the information stored for that pupil/student. It is therefore not necessary to expand each category before printing.

- Once you have reviewed the details and are confident you wish to proceed, click the **Delete** button on the toolbar.

IMPORTANT NOTE: Please note that this process is irreversible.

6. A message dialog prompts for confirmation that you wish to proceed. Click **Yes** to proceed (or **No** to cancel the process).
7. A dialog is displayed confirming that the deletion has been completed. Click **OK**.

Recording Leavers

If a pupil/student leaves your school for any reason, you can mark them as a leaver which removes them from your school, but enables historical records to be kept. During the Summer term, for example, you need to mark most or all pupil/students in your top year as leavers so that they are no longer on-roll at the start of the new academic year. The date of leaving and leaving destination, together with the reason for leaving can be recorded.

IMPORTANT NOTES: To ensure that historical data is accurately maintained, it is essential that you do not record leavers by removing their date of admission.

If a pupil/student who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove the date of leaving (please see Re-admitting Pupil/Students on page 297).

To ensure that information required for statutory returns (e.g. the School Census) is accurate and up to date, check that the leavers has been given an SEN Status other than **Not Assigned** and that an **Ethnicity** has been recorded before making the pupil/student a leaver.

1. Select **Routines | Pupil (or Student) | Leavers** to display the **Find Student(s)** browser.

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expe
Abbey, Grenetta	13	G	003979	01/09/2011				
Ackton, William	13	K	003923	01/09/2011				
Ahmed, Ackmar	13	L	003981	01/09/2011				
Amiel, Tanzeel	13	N	003924	01/09/2011				

2. Search for the required **Year** or **Reg Group** (or **Class**) by selecting from the appropriate drop-down lists and then click the **Search** button.

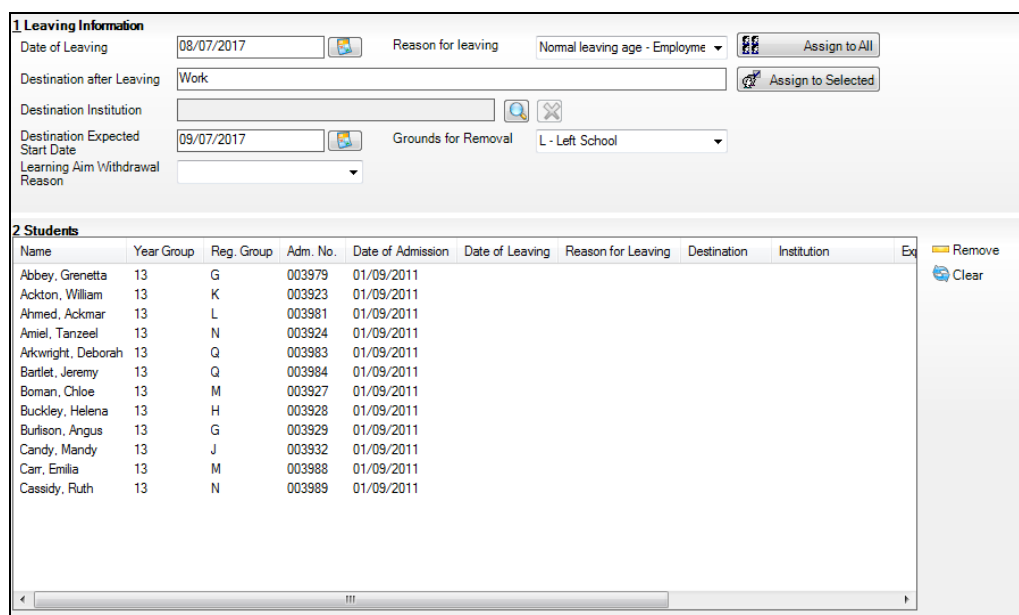
To select all the pupil/students displayed in the browser, click the **Select** button down arrow and select **All** from the drop-down menu.

To select a group of pupil/students, highlight them using any of the following methods:

- Hold down the **Ctrl** key and single-click each required pupil/student.
- To highlight sequentially listed children, single-click the first pupil in the list, hold down the **Shift** key then click the last required pupil in the list.

12 | Recording Leavers and Deleting Pupil/Student Records

- Once the required pupil/students have been highlighted, click the **Select** button. The selected pupil/students are then transferred to the **Students** panel.



The screenshot shows a software interface with two main sections: '1 Leaving Information' and '2 Students'.

1 Leaving Information

- Date of Leaving: 08/07/2017
- Reason for leaving: Normal leaving age - Employme
- Destination after Leaving: Work
- Destination Institution: (empty)
- Destination Expected Start Date: 09/07/2017
- Grounds for Removal: L - Left School
- Learning Aim Withdrawal Reason: (empty)

2 Students

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	Exp
Abbey, Grenetta	13	G	003979	01/09/2011					
Ackton, William	13	K	003923	01/09/2011					
Ahmed, Ackmar	13	L	003981	01/09/2011					
Amiel, Tanzeel	13	N	003924	01/09/2011					
Arkwright, Deborah	13	Q	003983	01/09/2011					
Bartlet, Jeremy	13	Q	003984	01/09/2011					
Boman, Chloe	13	M	003927	01/09/2011					
Buckley, Helena	13	H	003928	01/09/2011					
Burison, Angus	13	G	003929	01/09/2011					
Candy, Mandy	13	J	003932	01/09/2011					
Carr, Emilia	13	M	003988	01/09/2011					
Cassidy, Ruth	13	N	003989	01/09/2011					

Buttons: Assign to All, Assign to Selected, Remove, Clear.

- Enter the **Date of Leaving** or click the **Calendar** button and select the required date.



Calendar button

This date of leaving should be the date that the pupil/student is actually leaving the school if they are not for transferring from Junior/Primary to Secondary phase. Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not have any gaps between dates and may suggest a date of leaving (the old school) of 4th September and the date of admission (into the new school) of 5th September. If you are in any doubt, please contact your Local Authority for advice.

IMPORTANT NOTE: It is recommended that pupil/students leaving at the end of Year 11 who may return to Year 12, are not given a date of leaving until it has been confirmed that they will be leaving the school at the end of the Summer term as this may cause issues with Attendance information.

- Select the **Reason for Leaving** from the drop-down list, such as **Normal leaving age - Employment**.
- Enter the **Destination after Leaving** if required. Alternatively, you can apply the **Reason for Leaving** to one set of pupil/students (as described in the previous step), then select the **Destination after Leaving** for a different, or subset of pupil/students.
- Enter the **Destination Expected Start Date** or select the required date from the Calendar.
- Select the **Grounds for Removal** from the drop-down list.

9. Secondary schools in England can select a **Learning Aim Withdrawal Reason** from the drop-down list. Secondary schools in Wales can select an **LA Withdrawal Reason** (Learning Activity). When recording a **Learning Aim Withdrawal Reason** for Post 16 students, this information is used by Course Manager.

The screenshot shows a software interface with two main panels. The top panel, titled '1 Leaving Information', contains several input fields and buttons. The 'Date of Leaving' field is set to '08/07/2017'. The 'Reason for leaving' dropdown is set to 'Normal leaving age - Employme'. The 'Destination after Leaving' field is set to 'Work'. The 'Destination Institution' field is empty. The 'Destination Expected Start Date' field is set to '09/07/2017'. The 'Grounds for Removal' dropdown is set to 'L - Left School'. The 'Learning Aim Withdrawal Reason' dropdown is open, showing options: 'Other provider (gov)', 'Other provider', 'Injury/Illness', 'Financial', 'Personal', 'Exclusion', 'Other', and 'Not Known'. The bottom panel, titled '2 Students', contains a table with columns: Name, Year Gr, Reason for Leaving, Date of Admission, Date of Leaving, Reason for Leaving, Destination, Institution, and Ex. The table lists three students: Abbey, Grenetta (Year 13, Financial, 1/09/2011, 1/09/2011, Exclusion, , , , , ,); Ackton, William (Year 13, Personal, 1/09/2011, 1/09/2011, Other, , , , , ,); and Ahmed, Ackmar (Year 13, Not Known, 1/09/2011, 1/09/2011, Not Known, , , , , ,). To the right of the table are buttons for 'Remove' and 'Clear'.

10. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys (as described in step 2) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
11. If an error has been made, highlight the particular pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
12. To remove a pupil/student from the list, highlight their name and then click the **Remove** button.
13. To clear the contents of the fields in the **Leaving Information** panel, highlight the required pupil/student(s) then click the **Clear** button. Re-enter the information as required.
14. Click the **Save** button to save the changes. The chosen pupil/student(s) are recorded with a date of leaving on the date specified.

Recording Individual Leavers Via the School History Panel

It is also possible to record individual leavers during the school year using the **School History** panel on the **Pupil (or Student) Details** page.

1. Select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Pupil (or Student)** browser.
2. Enter details in the fields and select from the drop-down lists to narrow your search, then click the **Search** button. Leaving all fields blank and clicking the **Search** button displays all current pupil/students.
3. Select the required pupil/student.

- Click the **School History** hyperlink to display the **School History** panel.

11 School History

Date of Leaving  Reason for Leaving

Destination After Leaving

Destination Institution  

Destination Expected Start Date  CMJ file sent or not required ☐ CML file sent or not required ☐

Grounds for Removal

Previous Schools

School	Date of Arrival	Date of Leaving	Reason for Leaving	Enrolment Mode

 New
 Open
 Delete

CTF Attendance

Year	School	Possible	Attended	Authorised	Unauthorised
2013	WATERS EDGE PRIMARY SCHOOL	306	205	2	99
2012	WATERS EDGE PRIMARY SCHOOL	378	256	122	0

 New
 Open
 Delete

- Enter the required **Date of Leaving** or click the **Calendar** button and select the required date.
- Select the **Reason for Leaving** from the drop-down list, such as **End of phase transfer - Maintained school**.
- Enter the **Destination after Leaving** and/or the **Destination Institution**, if required.
- Enter the **Destination Expected Start Date** or click the **Calendar** button and select the required date.
- Select the **Grounds for Removal** from the drop-down list.
- Click the **Save** button to save the changes.

13 | Recording Behaviour Incidents

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Introduction

Behaviour Management is used to record, monitor and manage pupil/student behaviour in your school and consists of the following four areas:

- Behaviour
- Achievements
- Detentions
- Report cards.

The Behaviour area is used by schools to record incidences of misbehaviour, such as disruption, bullying, etc. and the outcome of such incidences. Information recorded in Behaviour Management can often be accessed via the **Links** panel on various pages in SIMS.

Each behaviour incident can be allocated a number of points. Points are recorded against the pupil/student across the current academic year and a cumulative points total is available. This enables schools to monitor and compare points for behaviour and achievements. A net points total, which is the result of subtracting the number of behaviour points from the number of achievement points, provides a useful overview of a pupil/student's conduct in school.

When recording behaviour incidents, some of the values available from drop-down lists can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values.

Recording Behaviour Incidents

There are four methods of recording behaviour incidents:

- Record a behaviour incident via the register (**Focus | Attendance** (or **Lesson Monitor**) | **Take Register**).

- Record a behaviour incident for an individual pupil/student via the **Links** panel – record the behaviour incident, and if required add a detention at the same time (please see *Adding/Editing an Individual Pupil/Student Behaviour Incident* on page 371).
- Record a behaviour incident for multiple pupil/students - add all the pupil/students involved and, if required, add a detention for all those involved (please see *Recording Behaviour Incidents* on page 349).
- Create a detention and add one or more pupil/students to it at the time of creation, then add a new behaviour incident (or link an existing one) from the detention (please see *Adding/Editing Detentions* on page 402).

It is possible to record multiple behaviour types against a behaviour incident record. For example, a fight in the playground may have led to further incidents, such as damage to property and theft. These additional incidents can also be added to the record as additional behaviour types.

This section describes how to record an incident and how to add the pupil/students involved, then record any additional behaviour types. It is possible to record a behaviour incident for a specific pupil/student, such as disruptive behaviour in class (please see *Adding/Editing an Individual Pupil/Student Behaviour Incident* on page 371).

When recording behaviour incidents, specifying the location is particularly useful because it enables you to produce reports based on the incident location. This enables *hot spot* areas for poor behaviour to be identified. Appropriate preventative measures can then be taken, such as the provision of additional staffing. It is also possible to link one or more documents to the behaviour record to provide any required supplementary information.

Recording behaviour incidents provides historical evidence of poor behaviour for the Board of Governors or Local Authority when considering an exclusion, for example.

It is possible to report on behaviour incidents using a wide range of pre-defined behaviour reports (please see *Reporting on Behaviour Incidents* on page 379).

When a new behaviour incident occurs the details should be recorded immediately, while the details of the incident are clear in your mind.



Additional Resources:

Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Setting up Behaviour Types and Behaviour Role Types

When recording behaviour incidents, some of the values available from drop-down lists can be edited to meet the specific needs of your school.

You can amend the types of behaviour that can be recorded and assign a points value to each type. You can also re-arrange the order in which behaviour types are displayed in lists so that the behaviour types recorded most frequently can be accessed more easily. Additionally, behaviour types can be made available via the register, enabling you to record a behaviour incident while taking the register.

If a behaviour type associated with bullying is selected, you can also record the type of bullying that took place. To record this additional information, behaviour types must be associated with bullying. Behaviour types and bullying types are managed using the **Maintain Behaviour Types** page (via **Tools | Setups | Behaviour Management | Behaviour Type**) and the **Lookup Type Details** page (via **Tools | Lookups | Maintain**).

When recording details of a behaviour incident, it is also possible to record a person's role in the incident, e.g. witness, aggressor, etc. To record this information, behaviour role types must be set up. Behaviour role types are managed using the **Maintain Behaviour Role Types** page (via **Tools | Setups | Behaviour Management | Behaviour Role Type**).



Additional Resources:

Setting Up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook
Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Searching for Existing Behaviour Incidents

Before recording the details of a behaviour incident, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific incidents, e.g. you can view a list of all the incidences of bullying in the current academic year. Alternatively, you can view a behaviour incident from the pupil/student record of one of the pupil/students involved (via **Focus | Pupil (or Student) | Pupil (or Student) Details**).

1. Select **Focus | Behaviour Management | Maintain Behaviour Incidents** to display the **Find Behaviour Incident** browser.

2. Select an item from one or more of the following drop-down lists to filter the list of behaviour incidents: **Type** (e.g. **Bullying**), **Activity** (e.g. **Science**), **Year Group**, **Class**, **House**, **Tier**, **Location** and **Status**. Users in Secondary schools can also search by **Reg Group**.

13 | Recording Behaviour Incidents

3. Define the date range of the search by:
 - selecting the **Date Range** radio button then entering the required date range in the **From** and **To** fields, or selecting from the Calendar. The default date range is from today to the last day of the current academic year.
 - or
 - selecting the **Cycle** radio button then selecting the required date range from the drop-down list, e.g. **Year to Date**. The default date range is from the first day of the current academy year to today.
4. To search for behaviour incidents **Recorded By** a specific person, click the **Browser** button then search for and select the required person using the **Select person** dialog. This filter can be removed by clicking the **Delete Filter** button.
5. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all behaviour incidents on the date (or date range) specified.

Date	Type	Location	Comments	Status	Recorded By	Activity	Student Nos.
13/02/2012	Homework	Classroom	Jenny had not learn her 12 times table and	Resolved	Mrs Gillian Grosv...	Numeracy	1
02/02/2012	Homework		No homework handed in	Unresolved	Mrs Gillian Grosv...	Geography	1
30/01/2012	Homework	Classroom	Homework not delivered.	Resolved	Mrs Gillian Grosv...	Literacy	1
17/01/2012	Homework	Classroom	Spellings had not been taken home and lear...	Review in 1 Week	Mrs Gillian Grosv...	Literacy	3
10/10/2011	Homework	Classroom	Jordan has still not learn't his 9 times tables. ...	Unresolved	Mrs Gillian Grosv...	Numeracy	1
16/09/2011	Homework	Classroom	Disappointing that Isabella clearly has not le...	Further Intervention Required	Mrs Gillian Grosv...	Literacy	1

A summary of each behaviour incident is displayed in the results area, including the **Date** and **Time** of the incident, the **Location**, its **Status** and the number of pupil/students involved (**Student Nos**).

6. Highlight the incident you wish to view or edit then click the **Open** button to display its details on the **Behaviour Incident** page. If you cannot find the required record, click the **New** button to display the **Behaviour Incident Details** page.

*NOTE: It is also possible to view a behaviour incident from a pupil/student's record (via **Focus | Pupil (or Student) | Pupil (or Student) Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all behaviour incidents linked to this pupil/student by navigating to the **Behaviour** panel.*

Adding /Editing a Behaviour Incident

1. Select **Focus | Behaviour Management | Maintain Behaviour Incidents** to display the **Find Behaviour Incident** browser.
2. Search for an existing behaviour incident (please see *Searching for Existing Behaviour Incidents* on page 351) then click the **Open** button to edit its details on the **Behaviour Incident** page or click the **New** button to display the **Behaviour Incident Details** page.

1 Details

Type
Lunch Time Incident
Points Defined
1

Type Of Bullying

Additional Types

Description	Points

New
Delete

Activity
Location
Playing Field

Date
09/03/2012
Time
Lunch

Comments

Group of boys playing football. Ball was kicked by accident over into a neighbouring garden. Ben Elliott and Mario Fucillo climbed into the garden to retrieve the ball. Whilst the others kept watch. Neighbour saw them from her kitchen window and reported to the school. They were also spotted by the midday supervisor who was walking towards them at the time of incident.

Recorded On
09/03/2012
Status
Further Intervention Required

Recorded By
Mrs Gillian Grosvenor

2 Other Staff Involved

Name	Role
Mrs Gillian Grosvenor	

New
Open
Delete

3 Students Involved

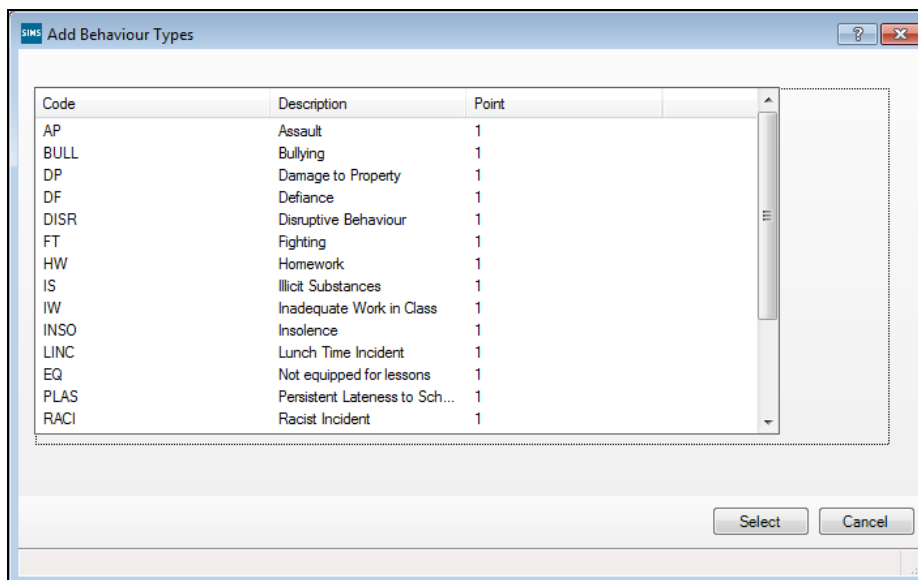
Name	Role	Year	Class	House	Points	Detention
Payal Adedeji	Bystander	6	6VC		1	Yes
Ben Elliot	Participant	6	6VC		1	Yes
Mario Fucilla	Participant	6	6VC		1	Yes
Alan Hiraoka	Bystander	6	6VC		1	Yes
Jack Newman	Bystander	6	6VC		1	Yes
Tony Smith	Bystander	6	6VC		1	Yes

New
Open
Remove
Detention
Report Card
Exclusion
Send

3. Select the required incident **Type** from the drop-down list, e.g. **Fighting**. The **Points Defined** field displays the default value assigned to the behaviour type and cannot be edited.

13 | Recording Behaviour Incidents

4. If a behaviour type is selected from the **Type** drop-down list that is associated with bullying, the **Type Of Bullying** field can be completed by selecting from the drop-down list. This enables you to record additional information regarding a bullying incident (e.g. a behaviour **Type** of **Racist Incident** may have a bullying type of **Teasing** or **Name Calling**). Additional types of bullying can be added using Maintain Lookups (via **Tools | Lookups | Maintain**). This functionality enables you to amend the values to those that commonly occur in your school. For more information, please refer to the *Importing and Maintaining Lookups* section of the *Setting Up and Administering SIMS* handbook.



5. Highlight the required behaviour type. Multiple behaviour types can be selected by holding the **Ctrl** key and clicking each type. Click the **Select** button to return to the **Behaviour Incident Details** page, where the details of any added behaviour types are displayed in the **Additional Types** table. Any unwanted additional types can be removed by highlighting them then clicking the **Delete** button adjacent to the table.
6. If applicable, select the **Activity**, e.g. **Physical Education**.
7. Select the **Location** from the drop-down list, e.g. **Playing Field**, where the incident occurred.
8. For a new behaviour incident record, the **Date** of the incident defaults to today. Amend the date if required, or click the **Calendar** button then select the required date.
9. Select the **Time** of the incident from the drop-down list, e.g. **End of School**.
10. Enter any **Comments** about the incident. These comments can also include an explanation of the outcome, if required.
11. For a new behaviour incident record, the **Recorded On** field defaults to today's date. For an existing record, this field displays the date on which the incident was initially recorded. This can be amended by editing the date or by clicking the **Calendar** button then selecting the required date.
The name of the person recording the behaviour incident is displayed in the **Recorded By** field.

12. Select the required **Status** of the incident from the drop-down list, e.g. **Unresolved**, **Resolved**, etc. depending on whether the incident is considered closed or whether there are outstanding actions to be taken.



More Information:

Setting up Behaviour Types and Behaviour Role Types on page 350

Adding/Editing the Staff Involved

Once the record is saved for the first time, the **Other Staff Involved** panel displays the name of the user who is recording the incident.

1. To specify additional or alternative members of staff involved in the incident, either highlight the required member of staff in the **Other Staff Involved** panel then click the **Open** button to display the **Edit Behaviour Staff** dialog or click the **New** button to display the **New Behaviour Staff Link** dialog.

2. Click the **Browser** button adjacent to the **Staff** field to display the **Select person** dialog.

3. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
4. Highlight the required member of staff then click the **OK** button to return to the **New Behaviour Staff Link** dialog.

13 | Recording Behaviour Incidents

5. Select the required **Role** from the drop-down list, e.g. **Class Teacher** then click the **OK** button to return to the **Behaviour Incident** page. The selected member of staff is displayed in the **Other Staff Involved** panel.

Name	Role
Mrs Gillian Grosvenor	

New
Open
Delete

6. Repeat this process for any other members of staff involved in the behaviour incident.
7. To remove a member of staff, highlight them then click the **Delete** button.

Recording the Pupil/Students Involved

1. To specify the pupil/students involved in the incident, click the **New** button in the **Students Involved** panel to display the **Select Students** dialog.

SIMS Select Students

Search View

Surname Forenames Status Current Effective Date 25/06/2012

Tier <Any> Year Group <Any> Class <Any> House <Any>

Name	Year Group	Class	House	Gender	Admission Number

OK Cancel

2. Enter any required search criteria or leave the fields blank to display all pupil/students then click the **Search** button.

- Highlight the required pupil/student. Multiple pupil/students can be selected by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key then clicking to select a block of pupil/students.

SIMS Select Students

Search View

Surname: Forenames: Status: Current Effective Date: 25/06/2012

Tier: <Any> Year Group: <Any> Class: <Any> House: <Any>

Name	Year Group	Class	House	Gender	Admission Number
Aaron, Chris	1	PINE		Male	001102
Aaron, Liz	1	PINE		Female	001103
Aaron, Sophie	1	ASH		Female	001104
Abraham, Jane	2	2GH		Female	001041
Ackton, Stan	5	5BB		Male	000842
Ackton, Stephen	1	ELM		Male	001175
Acton, Jordan	3	3TO		Male	000981
Acton, Samantha	4	4ES		Female	001011
Adams, Adam	2	2JB		Male	001122
Adams, Laura	R	ELM		Female	001235
Adasheji, Mohammed	1	PINE		Male	001176
Adebayor, Emmanuel	3	3CB		Male	001068
Adedeji, Payal	6	6VC		Male	000797
Affleck, Alexis	5	5DT		Female	000843

OK Cancel

433 matches found

- Click the **OK** button to display the **Add Students Involved** dialog, where the selected pupil/students are displayed.

SIMS Add Students Involved

Pupil Details

Name	Gender	Points	Role	Parents / Carers Informed	Action Taken	Action Date	Actioned By
Chris Aaron	Male	1					
Liz Aaron	Female	1					
Mohammed A.	Male	1					

Add Remove Actioned By

OK Cancel

- Additional pupil/students can be added by clicking the **Add** button to display the **Select Students** dialog then repeating steps 2 to 4. Pupil/students added in error can be removed by highlighting them then clicking the **Remove** button.
- For each pupil/student involved:
 - The **Points** field displays the default number of points awarded for the selected behaviour type(s). The default points value is allocated to every pupil/student selected. Additional or fewer points can be applied to individual pupil/students by clicking in the cell then overtyping the value.
 - Select the pupil/student's **Role** in the incident from the drop-down list, e.g. **Aggressor**, **Target**, **Witness**, etc.

IMPORTANT NOTES: If you select a **Role** of **Target** or **Witness**, the **Points** field is set automatically to **0** to ensure that this incident does not have an adverse effect on their behaviour record.

If you select a **Role** of **Bystander**, you may wish to edit the behaviour **Points** to **0** manually for the same reason.

- Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents / Carers Informed** drop-down list.
- If applicable, select the **Action Taken** from the drop-down list, e.g. **Detention**, **Discussed with Parents**, etc.
- Enter the **Action Date** in the cell or click in the cell then select the required date from the drop-down list.
- To select the member of staff who has actioned the sanction and to populate the **Actioned By** field, click the **Actioned By** button to display the **Select person** dialog, search for and highlight the required person then click the **OK** button to return to the **Add Students Involved** dialog.

TIP: It is possible to select multiple pupil/students in the **Add Students Involved** dialog by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Action Taken** from the drop-down list and all highlighted pupil/students are assigned the selected **Action Taken**. This also applies to the **Points**, **Role** and **Parent / Carers Informed** drop-down lists.

Name	Gender	Points	Role	Parents / Carers Informed	Action Taken	Action Date	Actioned By
Chris Aaron	Male	1	Aggressor	Letter			
Liz Aaron	Female	0	Witness	Letter			
Mohammed A.	Male	0	Witness	Letter			

7. When all the necessary details have been entered, click the **OK** button to return to the **Behaviour Incident** page. The details of all pupil/students involved are displayed in the **Students Involved** panel.

3 Students Involved						
Name	Role	Year	Reg	House	Points	Detention
Chris Aaron	Aggressor	1	PINE		1	No
Liz Aaron	Witness	1	PINE		0	No
Mohammed Adasheji	Witness	1	PINE		0	No

New

Open

Remove

Detention

Report Card

Exclusion

Send

8. If you have added a pupil/student to the **Students Involved** panel in error, highlight them and click the **Delete** button to remove them.
9. To edit the individual behaviour details of a pupil/student added in step 5, highlight their name then click the **Open** button to display the **Edit Behaviour Student** dialog. To edit the behaviour details of multiple pupil/students, highlight their names then click the **Open** button to display the **Edit Students Involved** dialog.

SIMS Edit Behaviour Student - Chris Aaron

Pupil Details

Pupil:

Points: Role:

Action Taken: Date of Action:

Parents / Carers Informed: Actioned by:

Notes / Documents

Attachment	Summary	Type	Owner	Last Modified On

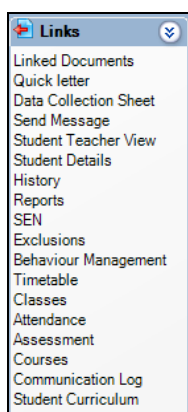
New

Open

Delete

10. Attach any **Notes/Documents**, such as a copy of the letter sent to the parent/guardians, if required.
11. Click the **OK** button to confirm the details and return to the **Behaviour Incident** page.
12. Click the **Save** button to save your changes.

The **Links** panel is displayed on the right-hand side of the **Behaviour Incident** page. This panel is used to access various areas of SIMS relating to the pupil/student highlighted in the **Students Involved** panel. For example, highlighting Chris Aaron then clicking the **Pupil Details** link displays Chris' full details on the **Pupil (or Student) Details** page, whereas any exclusions recorded against him can be displayed by clicking the **Exclusions** link, etc (please see *Using the Pupil/Student Links Panel* on page 145).



More Information:

Attaching a New Note/Document on page 147

Using the Pupil/Student Links Panel on page 145

Recording Follow Up Details for Students Involved

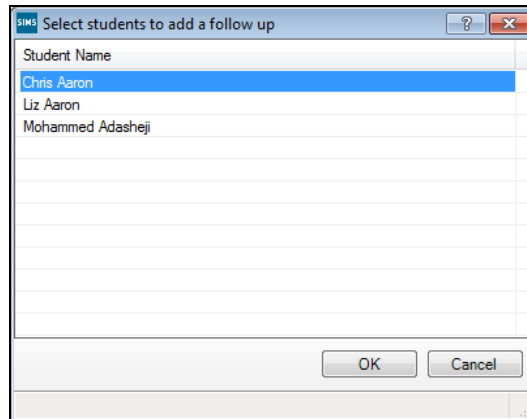
When a pupil/student has been recorded as being involved in a behaviour incident, it is also possible to record details of any follow-up activities taken, or meetings held, in response to their involvement.

1. Click the **Follow Up Students Involved** hyperlink to display the **Follow Up Students Involved** panel.

 A screenshot of the 'Follow Up Students Involved' panel. At the top, there are two buttons: 'Add Follow Up' and 'Remove Follow Up'. Below these are two input fields: 'Follow Up Date' and 'Referred To', with a 'Select Staff' button next to the latter. A checkbox labeled 'Send personal reminder to the referred staff for followup.' is present. Below this is a large text area for 'Comments'. A 'Summary' section contains a table with columns: 'Recorded On', 'Recorded By', 'Follow Up Date', and 'Outcome'. At the bottom, there is a 'Reviews' section with a table with columns: 'Date of review', 'Student Name', 'Venue', 'Start Time', and 'Organised By'. To the right of the reviews table are four icons: 'New', 'Open', 'Delete', and 'Letter'.

- Click the **Add Follow Up** button to display the **Select students to add a follow up** dialog.

*NOTE: A follow up record can be deleted by clicking the **Remove Follow Up** button to display the **Select students to remove a follow up** dialog, highlighting the required pupil/student(s) then clicking the **OK** button.*



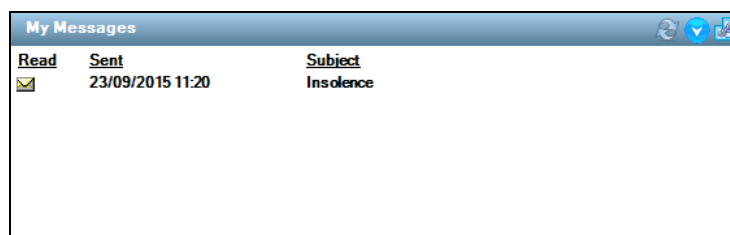
- Highlight the required pupil/student then click the **OK** button to return to the **Behaviour Incident** page.

Multiple pupil/students can be highlighted by clicking the first name, holding down the **Ctrl** key then clicking any other required names.

The name(s) of the selected pupil/student(s) are highlighted in blue in the **Students Involved** panel to indicate that a follow up record has been created for them.

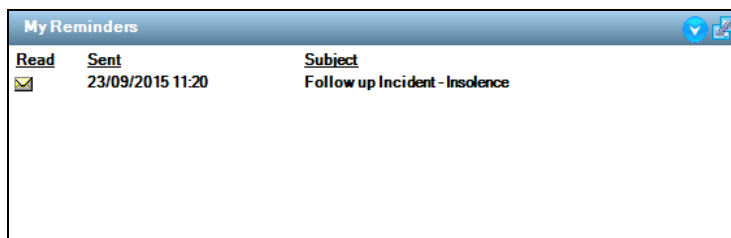
- The **Follow Up Date** is the date by which the behaviour incident should be reviewed. This defaults to today's date (if the record is saved before adding a follow up record) but it can be amended by entering the required date or by clicking the **Calendar** button then selecting the required date.
- If you wish to refer the behaviour incident to a member of staff, this can be recorded using the **Referred To** field. Click the **Select Staff** button to display the **Select person** dialog, search for and highlight the required member of staff then click the **OK** button to return to the **Behaviour Incident** page.

A message is sent automatically to the selected member of staff when the behaviour incident record is saved, informing them that the incident has been referred to them. The message is accessible to the selected member of staff via the **My Messages** panel on the **SIMS Home Page**.



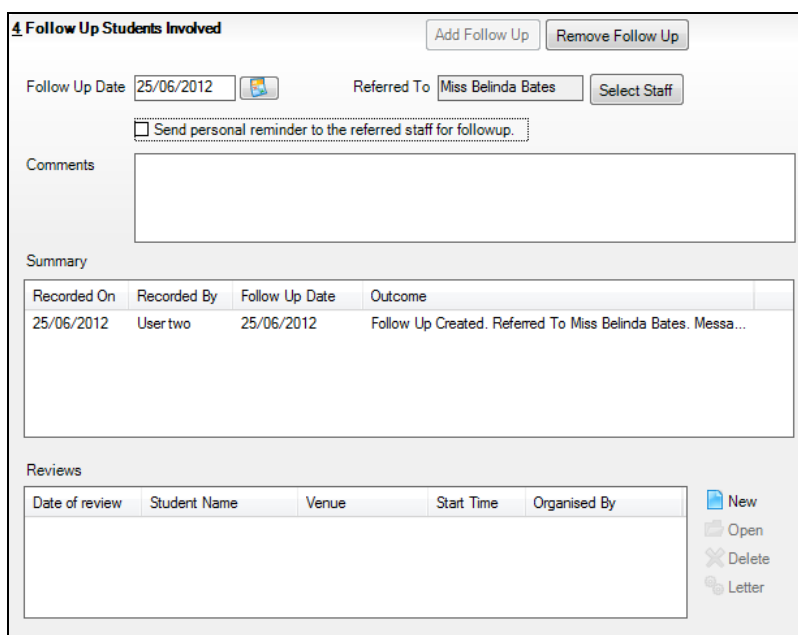
13 | Recording Behaviour Incidents

6. Select the **Send personal reminder to the referred staff for followup** check box to indicate that you wish to send a reminder to the selected member of staff, informing them that a follow up action is required. This reminder is sent to the member of staff named in the **Referred To** field when the record is saved. This message is accessible via the **My Reminders** panel on the **SIMS Home Page**.



Read	Sent	Subject
☒	23/09/2015 11:20	Followup Incident - Insolence

7. Enter any **Comments** regarding the involvement of the selected pupil/student(s) in the behaviour incident.
8. Click the **Save** button to save the record.



4 Follow Up Students Involved Add Follow Up Remove Follow Up

Follow Up Date: Calendar icon Referred To: Select Staff

☐ Send personal reminder to the referred staff for followup.

Comments:

Summary

Recorded On	Recorded By	Follow Up Date	Outcome
25/06/2012	User two	25/06/2012	Follow Up Created. Referred To Miss Belinda Bates. Messa...

Reviews

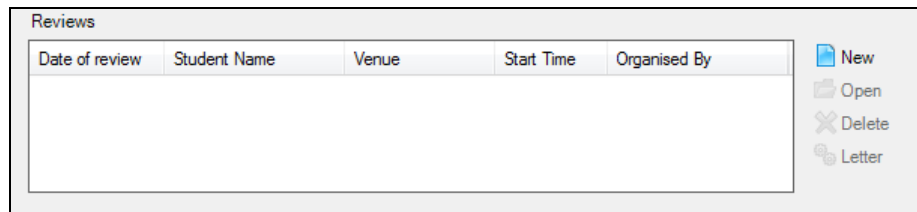
Date of review	Student Name	Venue	Start Time	Organised By

New Open Delete Letter

Once the behaviour incident has been saved, the **Summary** panel is populated with the details entered, a message is sent automatically to the member of staff indicated in the **Referred To** field and a reminder of any follow up action is also sent to the appropriate member of staff.

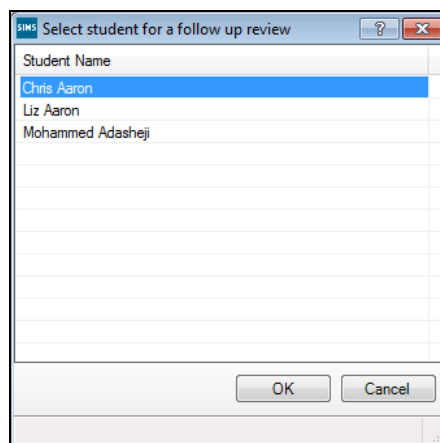
Creating a Review Meeting

A review meeting can be set up to discuss an incident further, if required.



The screenshot shows a window titled 'Reviews'. It contains a table with the following headers: 'Date of review', 'Student Name', 'Venue', 'Start Time', and 'Organised By'. The table is currently empty. To the right of the table, there are four buttons: 'New' (with a blue document icon), 'Open' (with a folder icon), 'Delete' (with a red X icon), and 'Letter' (with a printer icon).

1. Click the **New** button adjacent to the **Reviews** table in the **Follow Up Students Involved** panel to display the **Select student for a follow up review** dialog.



The screenshot shows a dialog box titled 'Select student for a follow up review'. It has a list box labeled 'Student Name' containing three entries: 'Chris Aaron', 'Liz Aaron', and 'Mohammed Adasheji'. 'Chris Aaron' is selected and highlighted in blue. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

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2. Highlight the required pupil/student then click the **OK** button to display the **Add/Edit Behaviour Review** dialog.

SIMS Add/Edit Behaviour Review For Liz Aaron

General

Review Meeting Status: **Planned**

Date: **25/06/2012** Start Time: **00:00**

Venue: **WATERS EDGE PRIMARY SCHOOL**

Meeting Organiser: **Miss Belinda Bates**

People Involved

Participant Name	Role	Attended

Actions Agreed

By Student

By Parents

Buttons: Print, OK, Cancel

The **Review Meeting Status** defaults to **Planned**. Once the meeting has taken place, this can be changed to **Meeting Completed**.

3. Enter the **Date** on which the meeting is scheduled to take place or click the **Calendar** button then select the required date.
4. Select the **Start Time** of the meeting from the drop-down list.
5. Enter the **Venue** of the meeting.
6. The **Meeting Organiser** defaults to the currently logged in user but can be amended by clicking the **Search** button to display the **Select person** dialog, searching for and highlighting the required member of staff then clicking the **OK** button to return to the **Add/Edit Behaviour Review** dialog.

11. Click the **New** button in the **Notes/Documents** panel to display the **Add Note / Document** dialog.

12. The note/document **Type** defaults to **General Document** but can be changed by selecting from the drop-down list, if required.
13. Select the **Status** of the note/document from the drop-down list.
 - **Public** – the note/document is available to all users with sufficient permissions.
 - **Private** – the document is available only to you.
 - **Confidential** – the document is available only to SIMS users with School Administrator or Senior Management Team permissions.
14. Enter a concise **Summary** of the note/document, together with any further detail in the **Note** field. This additional information can be useful as an overview and is also beneficial if a document ever becomes detached from the pupil/student record. If you do not want to add an attachment, click the **OK** button. If you do want to add an attachment, click the **Open** button adjacent to the **Attachment** to display the **Add attachment** dialog.
15. Navigate to the required location, highlight the required document then click the **Open** button to return to the **Add Note / Document** dialog.
16. The **Last uploaded** field remains empty until you have saved the record so click the **OK** button to return to the **Add / Edit Behaviour Review** dialog then click the **Open** button to re-open the note or document record.
Once saved, you can view the date and time of the last file upload, together with the name of the user who uploaded it.
17. It is possible to **View** or **Open** the attached document by clicking the respective buttons adjacent to the **Last uploaded** field.

The **View** button enables users with insufficient permissions to read the contents of the attachment. These users cannot amend or edit attachments because they are opened in read-only mode.

The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When an attachment has been opened and amended and the **Save** button is clicked on the main page, the **Upload modified documents** dialog is displayed. Select the **Status** check box and click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.

When you re-open the **Edit Note / Document** dialog after adding a note or attachment, the **Document Log** at the bottom of the **Edit note / document** panel records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. This log can be printed for future reference by clicking the **Print** button.

18. Click the **OK** button to save your changes and return to the **Behaviour Incident** page. Alternatively, click the **Print** button to produce a summary of the review details, which can be printed or saved.

Assigning Pupil/Students to a Detention

Pupil/students involved in a behaviour incident can be assigned to a detention using the **Behaviour Incident** page. Recording a detention from this page enables you to record detention details for a single pupil/student. It is also possible to record detention details for all pupil/students involved in a behaviour incident en masse (please see *Adding/Editing Detentions* on page 402).

1. From the **Students Involved** panel, highlight a pupil/student in the list. If a pupil/student has already been assigned to a detention in relation to the selected behaviour incident, the **Detention** column displays **Yes**.

NOTE: If a pupil/student is already assigned to a detention session, it is not possible to assign them to another detention session relating to the same behaviour incident.

2. Click the **Detention** button.
 - If the selected pupil/student is already assigned to a detention, you are asked whether you wish to open the record (please see *Viewing a Pupil/Student's Detention Record* on page 369) or remove the link to the detention (please see *Removing an Assigned Pupil/Student from a Detention* on page 369).
 - If the pupil/student is not already assigned to a detention, the **Student Detention Details** dialog is displayed for the selected pupil/student.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

The screenshot shows the 'Student Detention Details' dialog box. It contains three main sections: 'Students Involved', 'Staff Assigned', and 'Comments'. The 'Students Involved' section has a table with columns: Name, Points, Year, Reg, House, and Role. The 'Staff Assigned' section has a 'Staff Name' field with a search icon. The 'Comments' section has a text area. At the bottom are 'OK' and 'Cancel' buttons.

Name	Points	Year	Reg	House	Role
Jessica Dawson-Smith	1	2	2GH		

- For a new detention, the **Staff Assigned** panel is blank. To change the member of **Staff Assigned** to the detention, click the **Browse** button to display the **Select person** dialog.

The screenshot shows the 'Select person' dialog box. It has a 'People Browse' section with 'Search' and 'Print' buttons. Below these are search fields for 'Surname', 'Forename', and 'Role' (a dropdown menu). A large list box for 'Name' is below the search fields. At the bottom are 'OK' and 'Cancel' buttons.

- Enter any required search criteria, or leave the search fields blank to display all staff then click the **Search** button.
- Highlight the required member of staff then click the **OK** button to return to the **Student Detention Details** dialog.
- Enter any **Comments**. These comments are for any member of staff viewing the record in future.
- Click the **OK** button to display the **Add Detention Details** dialog. Record the details of the detention (please see *Adding/Editing Detentions* on page 402).



Additional Resources:

When viewing the topic referenced in step 7, please proceed directly to step 2 of the topic and ignore the process described in Assigning Pupil/Students to the Detention (because it is not possible to assign pupil/students to the detention directly).

*NOTE: It is not possible to remove a group of assigned pupil/students from a detention when accessing the **Add Detention Details** dialog from the **Behaviour Incident** page, although this is possible from a different screen (please see Adding/Editing Detentions on page 402). It is possible to remove an individual pupil/student from a detention using the **Behaviour Incident** page (please see Removing an Assigned Pupil/Student from a Detention on page 369).*

Viewing a Pupil/Student's Detention Record

Pupil/students involved in a behaviour incident can be assigned to a detention using the **Behaviour Incident** page. Once a detention has been recorded, its details can also be viewed from this page.

1. From the **Students Involved** panel, highlight the pupil/student whose detention record you wish to view. If a pupil/student has already been assigned to a detention in relation to the selected behaviour incident, the **Detention** column displays **Yes**.
2. Click the **Detention** button then select **Open** from the drop-down list to display the **Detention Details** dialog.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

3. Record the details of the detention (please see *Adding/Editing Detentions* on page 402).



Additional Resources:

When viewing the topic referenced in step 7, please proceed directly to step 2 of the topic and ignore the process described in Assigning Pupil/Students to the Detention (because it is not possible to assign pupil/students to the detention directly).

Removing an Assigned Pupil/Student from a Detention

If pupil/students have been assigned to a detention in error, it is possible to remove them from the detention (one at a time) using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight the required pupil/student. If a pupil/student is assigned to a detention in relation to the selected behaviour incident, the **Detention** column displays **Yes**.
2. Click the **Detention** button then select **Remove** from the drop-down list.
3. Click the **Yes** button to confirm that you wish to remove the highlighted pupil/student from the detention.

4. Click the **Save** button to save the record and update the **Detention** column for the selected pupil/student in the **Students Involved** panel to read **No**.
5. Repeat this process to remove any other pupil/students from the detention, if required.

Generating a Report Card

A member of the senior leadership team can generate a report card for a pupil/student involved in an incident using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight a pupil/student then click the **Report Card** button to display the **Report Card Details** dialog.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

2. Complete the details on the **Report Card Details** dialog.

Setting up an Exclusion

A member of the senior leadership team can set up an exclusion for a pupil/student involved in a behaviour incident using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight a pupil/student then click the **Exclusion** button to display the **Add Exclusion** dialog.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

2. Complete the details on the **Add Exclusion** dialog (please see *Recording an Exclusion* on page 435).

Sending Messages

It is possible to send a message to selected members of staff regarding one or more of the pupil/students involved in the behaviour incident using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight a pupil/student. To select multiple pupil/students, hold the **Ctrl** key then click each required pupil/student. To select sequentially listed pupil/students, hold the **Shift** key, click the first pupil/student then click the last pupil/student in the block.
2. Click the **Send** button in the **Students Involved** panel to display the **Send Message** dialog, with the selected pupil/student(s) displayed in the **Message** field (please see *Sending General Messages* on page 46).

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

3. Complete the details on the **Send Message** dialog (please see *Recording an Exclusion* on page 435).

Saving the Behaviour Incident

Once all the required information has been entered, click the **Save** button to save the record.

Adding /Editing an Individual Pupil/Student Behaviour Incident

This section describes how to record or edit a behaviour incident for an individual pupil/student. One or more documents can be linked to the behaviour record so that the required supplementary information can also be recorded.

It is also possible to record a behaviour incident then identify the pupil/students involved (please see *Recording Behaviour Incidents* on page 349).

Once a behaviour incident has occurred, it can be recorded in SIMS. Some schools may ask the member of staff involved to complete a proforma, which is then handed to the central office for data entry into SIMS.

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.

*NOTE: It is also possible to add behaviour incidents via the **Links** panel on the **Pupil (or Student) Details** page (via **Focus | Pupil (or Student) | Pupil (or Student) Details**). Click the **Behaviour Management** hyperlink in the **Links** panel to display the **Behaviour Management** page.*

Name	Year Group	YTI	Reg. Group	House	Gender	Admission Number
Abbess, Graham	8	8	8A	Boyle	Male	004504
Abbey, Grenetta	11	11	11F	Hooke	Female	003979
Abbey, Jimmy	13	13	G	Curie	Male	003599
Abbey, Sean	8	8	8B	Boyle	Male	004505
Abbot, Andrew	10	10	10E	Fleming	Male	004163
Abbot, Ben	11	11	11A	Newton	Male	004161

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2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.

1 Academic Year
 Academic Year Academic Year 2011/2012

Achievements Points 101 Behaviour Points 5 Net Points 96
 No. of Detentions Recorded 1 No. of Report Cards 0 No. of Interventions 0

2 Achievement

Date	Type	Points	Comments	Award	Award Date
28/09/2011	Excellent Effort	1	All students took part...	Commended	28/09/2011
01/09/2011	New Year Achieve...	100	Points awarded as a...	Points Awarded	01/09/2011

New Open Delete

3 Behaviour

Date	Type	Role	Points	Comments	Action	Action Date
01/03/2012	Damage to Prop...		2	Sat in back two ...	Detention	01/03/2012
23/01/2012	Not equipped for...		1	Second time has...	Discussed with ...	23/01/2012
19/09/2011	Inadequate Wor...		1	Not paying atten...	Discussed with ...	19/10/2011
05/09/2011	Homework		1	Spellings had cl...	Discussed with ...	05/09/2011

New Open Delete

4 Detention

Date	Location	Reason	Attended	Reason Not Attended
01/03/2012	J2	Damage to Property	Attended	

Open

5 Report Card

Reason for Report	Start Date	End date	Active	Additional Comments

New Open Delete

The **Academic Year** panel displays a summary of the selected pupil/student's behaviour and achievement records for the selected **Academic Year**.

3. Click the **Behaviour** hyperlink to display the **Behaviour** panel.

3 Behaviour

Date	Type	Role	Points	Comments	Action	Action Date
01/03/2012	Damage to Prop...		2	Sat in back two ...	Detention	01/03/2012
23/01/2012	Not equipped for...		1	Second time has...	Discussed with ...	23/01/2012
19/09/2011	Inadequate Wor...		1	Not paying atten...	Discussed with ...	19/10/2011
05/09/2011	Homework		1	Spellings had cl...	Discussed with ...	05/09/2011

New Open Delete

4. Click the **New** button to display the **Add Behaviour** dialog. Alternatively, highlight an existing behaviour incident then click the **Open** button to display the **Edit Behaviour** dialog, which you can use to edit the details.

Adding /Editing Incident Details

Incident Details

Type: Fighting 1

Type Of Bullying:

Additional Types:

Description	Points
Bullying	1

Activity Type: Location: Bus

Date: 23/09/2015 Time: Before School Hours

Comments: Aggressively pulling the hair of another pupil during an argument

Recorded On: 23/09/2015 Status: Further Intervention Required

Recorded By: Miss Belinda Bates

Pupil Details

Points: 4

Parents / Carers Informed: Telephone Role: Aggressor

Action Taken: Detention Date of Action: 23/09/2015

Actioned by: Miss Belinda Bates Select Staff Add Follow Up.

Buttons: Send, Detention, Report Card, Exclusion, OK, Cancel

1. Complete the information in the **Incident Details** panel (please see *Adding/Editing a Behaviour Incident* on page 353).
2. Click the **OK** button to return to the **Behaviour Management** page.

IMPORTANT NOTE: If you edit the **Incident Details** of any pupil/student who is part of a behaviour incident involving multiple pupil/students (please see *Adding/Editing a Behaviour Incident* on page 353) and click the **OK** button, a message warns you that **Any changes made will apply to the other students linked to the incident**. Click the **Yes** button to update the change across all linked pupil/student's incident details. Alternatively, click the **No** button to return to the **Add (or Edit) Behaviour** dialog without saving the change.



More Information:

Setting up Behaviour Types and Behaviour Role Types on page 350

Adding /Editing Pupil/Student Details

Pupil Details

Points: 4

Parents / Carers Informed: Telephone

Role: Aggressor

Action Taken: Detention

Date of Action: 23/09/2015

Actioned by: Miss Belinda Bates

Select Staff

☐ Add Follow Up

Send

Detention

Report Card

Exclusion

1. In the **Pupil (or Student) Details** panel, the **Points** field displays the default number of points awarded for the selected behaviour type(s). The default points value is allocated to every pupil/student selected. This value can be amended according to the severity of the incident, if required.
2. Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents / Carers Informed** drop-down list.
3. Select the pupil/student's **Role** in the incident from the drop-down list, e.g. **Aggressor, Target, Witness**, etc.

IMPORTANT NOTES: If you select a **Role** of **Target** or **Witness**, the **Points** field is set automatically to **0** to ensure that this incident does not have an adverse effect on their behaviour record.

If you select a **Role** of **Bystander**, you may wish to edit the behaviour **Points** to **0** manually for the same reason.

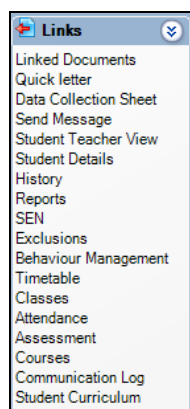
4. If applicable, select the **Action Taken** from the drop-down list, e.g. **Detention, Discussed with Parents**, etc.
5. Enter the **Date of Action** or click the **Calendar** button then select the required date.
6. Select the member of staff who has actioned the sanction and to populate the **Actioned By** field by clicking the **Select Staff** button to display the **Select person** dialog. Search for and highlight the required person then click the **OK** button to return to the **Add (or Edit) Behaviour** dialog.
When a pupil/student has been recorded as being involved in a behaviour incident, it is also possible to record details of any follow-up activities taken, or meetings held, in response to their involvement.
7. To record follow up details, select the **Add Follow Up** check box in the **Pupil Details** panel (please see *Recording Follow Up Details for Students Involved* on page 360).
8. To send a message regarding the pupil/student to other members of staff, click the **Send** button to display the **Send Message** dialog, with the selected pupil/student displayed in the **Message** field (please see *Sending General Messages* on page 46).
9. The following disciplinary actions can be recorded via the **Pupil/Student Details** panel:

To set up a detention, click the **Detention** button to display the **Add Detention Details for** dialog for the selected pupil/student (please see *Adding/Editing Detentions* on page 402).

Users with sufficient permissions can create a report card. Click the **Report Card** button to display the **Report Card Details** dialog for the selected pupil/student.

Users with sufficient permissions can create an exclusion. Click the **Exclusion** button to display the **Add Exclusion** dialog (please see *Recording an Exclusion* on page 435).

The **Links** panel is displayed on the right-hand side of the Behaviour Management page. This panel is used to access various areas of SIMS relating to the selected pupil/student. For example, highlighting **Joseph Jensen** then clicking the **Pupil Details** link displays Joseph's full details on the **Pupil (or Student) Details** page, whereas any exclusions recorded against him can be displayed by clicking the **Exclusions** link, etc (please see *Using the Pupil/Student Links Panel* on page 145).



Adding /Editing the Other Staff Involved

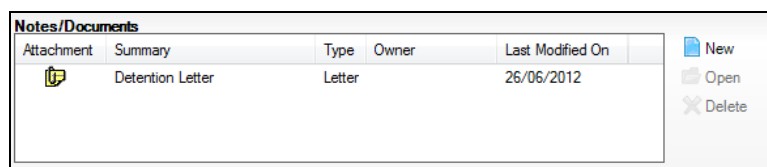
Once the record is saved for the first time, the **Other Staff Involved** panel displays the name of the user who is recording the incident.

1. Complete the information in the **New Behaviour Staff Link** panel (please see *Adding/Editing the Staff Involved* on page 355).
2. Click the **OK** button to return to the **Behaviour Management** page.

Adding Notes / Documents

It is possible to attach any files or documents, such as a statement from the child or staff member, a letter sent home to the pupil/student's parent/guardians, etc.

Add a note/document (please see *Attaching a New Note/Document* on page 147) then click the **OK** button to return to the **Add (or Edit) Behaviour** dialog. The note, together with any associated attachment, is displayed in the **Notes / Documents** panel.



Recording Follow Up Details

When a pupil/student has been recorded as being involved in a behaviour incident, it is also possible to record details of any follow-up activities taken, or meetings held, in response to their involvement.

Follow up details are recorded by selecting the **Add Follow Up** check box in the **Pupil Details** panel of the **Add Behaviour** dialog, accessed from the **Behaviour Management** page (via **Focus | Behaviour Management | Student Behaviour**). Details can then be recorded in the **Follow Up** panel, which is displayed at the bottom of the dialog.

Follow Up

Follow Up Date: 23/09/2015 Referred To:

☐ Send personal reminder to the referred staff for followup.

Comments:

Summary

Recorded On	Recorded By	Followup Date	Outcome

Reviews

Date of review	Venue	Start Time	Organised By

New
 Open
 Delete
 Letter

1. Complete the information in the **Follow Up** panel (please see *Recording Follow Up Details for Students Involved* on page 360).
2. Click the **OK** button to return to the **Behaviour Management** page.

Saving the Behaviour Incident

1. Click the **OK** button to return to the **Behaviour Management** page. The incident is displayed in the **Behaviour** panel.

Behaviour

Date	Type	Role	Points	Comments	Action	Action Date
01/03/2012	Damage to Prop...		2	Sat in back two ...	Detention	01/03/2012
23/01/2012	Not equipped for...		1	Second time has...	Discussed with ...	23/01/2012
19/09/2011	Inadequate Wor...		1	Not paying atten...	Discussed with ...	19/10/2011
05/09/2011	Homework		1	Spellings had cl...	Discussed with ...	05/09/2011

New
 Open
 Delete

2. Click the **Save** button to save the behaviour incident.

The **Academic Year** panel displays the accumulated points total for all events recorded against this pupil/student for the selected academic year and serves as a useful overview of a pupil/student's conduct at your school. The **Net Points** field displays the total points attributed to the pupil/student as a result of subtracting the total behaviour points from the total achievement points. For example, if a pupil/student has accumulated 8 achievement points and 5 behaviour points, the **Net Points** total is 3.

1 Academic Year			
Academic Year	Academic Year 2011/2012		
Achievements Points	101	Behaviour Points	5
		Net Points	96
No. of Detentions Recorded	1	No. of Report Cards	0
		No. of Interventions	0

A **Net Points** score above zero indicates generally positive behaviour, whereas a score below zero indicates generally negative behaviour.

Adding /Editing Initiatives Details

As part of the investigation and recording processes for when a behaviour incident occurs at your school, it is possible to record any communication regarding the incident with any interested parties. In SIMS, these communications are known as initiatives.

Initiatives might be used to discuss a pupil/student's behaviour with their parent/guardians or to record the occurrence of a meeting with interested parties. They are likely to be recorded prior to deciding what action to take with regard to a behaviour incident.

When recording initiative details, the values available from the **Initiative Type** drop-down list can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values (via **Tools | Lookups | Maintain**).

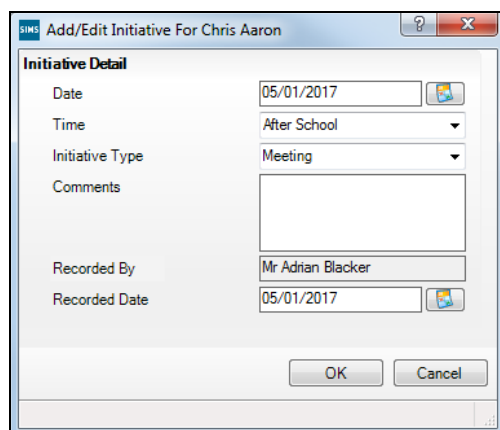
1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.
2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.
3. Click the **Initiatives** hyperlink to display the **Initiatives** panel.

8 Initiatives			
Date	Time	Type of Initiative	Comments

[New](#)
[Open](#)
[Delete](#)

13 | Recording Behaviour Incidents

4. Highlight an existing intervention record then click the **Open** button or click the **New** button to display the **Add/Edit Initiative** dialog.



5. Enter the initiative **Date** or click the **Calendar** button then select a date. The date entered can be any time in the past (including past academic years) and for any future date in the current academic year.
6. Select the **Time** of the initiative from the drop-down list, e.g. **After School**.
7. Select the **Initiative Type** from the drop-down list, e.g. **Communication with Home** or **Meeting**.
8. Enter any **Comments** about the initiative, if required.
The **Recorded By** date is populated with the name of the current user.
9. The **Recorded Date** is populated with today's date but can be edited by clicking the **Calendar** button then selecting the required date.
10. Click the **OK** button to return to the **Behaviour Management** page, where the information recorded is displayed in the **Initiatives** panel.
11. Remove an unwanted initiative record by highlighting it then clicking the **Delete** button adjacent to the table.
12. Click the **Save** button to save the record.

NOTE: The total number of initiatives for the selected pupil/student (**No. of Initiatives**) for the selected academic year is displayed in the **Academic Year** panel.

Deleting a Behaviour Incident

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.
2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.
3. Click the **Behaviour** hyperlink to display the **Behaviour** panel.
4. Highlight the required incident then click the **Delete** button.
5. Click the **Save** button.

Reporting on Behaviour Incidents

Behaviour incidents can be reported on using SIMS reporting. A wide range of pre-defined behaviour reports is available via **Reports | Run Report**. For information on the latest pre-defined reports, please refer to the *SIMS Pre-Defined Reports Catalogue*.

14 | Recording Achievements

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Introduction

Behaviour Management is used to record, monitor and manage pupil/student behaviour in your school and consists of the following four areas:

- Behaviour
- Achievements
- Detentions
- Report cards.

The Achievements area is used by schools to record incidences of positive or commendable behaviour, excellent test results, representing a sports team, etc. Information recorded in Behaviour Management can often be accessed via the **Links** panel on various pages in SIMS.

Each achievement can be allocated a number of points. Points are recorded against the pupil/student across their time at your school and a cumulative points total is available. This enables schools to monitor and compare points for behaviour and achievements. A net points total, which is the result of subtracting the number of behaviour points from the number of achievement points, provides a useful overview of a pupil/student's conduct in your school.

When recording achievements, some of the values available from drop-down lists can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values.

Recording Achievements

There are three methods of recording achievements:

- Record an achievement via the register (**Focus | Attendance** (or **Lesson Monitor**) | **Take Register**).
- Add an achievement to an individual pupil/student record, e.g. an excellent piece of art work.

- Record an achievement for multiple pupil/students, e.g. participation in the school play.

It is also possible to record additional achievement types in an achievement record. For example, a pupil/student may have displayed excellent effort in their greeting of other pupil/students on a school visit. In this case, a school visit achievement can be set up, with a second achievement type of excellent effort added to the record.

This section describes how to record an achievement and how to add the pupil/students involved. It is possible to record an achievement for a specific pupil/student.

The type of achievement, any related subjects and any staff involved can be recorded on the achievement record, together with any additional achievements attained at the time. It is also possible to link one or more documents to the achievement record to provide any required supplementary information, e.g. a certificate or merit.

It is possible to report on achievements using a wide range of pre-defined achievement reports (please see *Reporting on Achievements* on page 395).



Additional Resources:

Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook



More Information:

Recording an Individual Pupil/Student Achievement on page 391
Reporting on Achievements on page 395

Setting up Achievement Types

When recording achievements, some of the values available from drop-down lists can be edited to meet the specific needs of your school.

You can amend the types of achievement that can be recorded and assign a points value to each type using the **Maintain Achievement Types** page (via **Tools | Setups | Behaviour Management | Achievement Type**). You can also re-arrange the order in which achievement types are displayed in lists so that the achievements most frequently awarded can be accessed more easily. Additionally, achievement types can be made available via the register, enabling you to record an achievement while taking the register.



Additional Resources:

Setting Up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook

Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Searching for Existing Achievements

Before recording the details of an achievement, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific achievements. Alternatively, you can view an achievement from the pupil/student record of one of the pupil/students involved (via **Focus | Pupil (or Student) | Pupil (or Student) Details**).

1. Select **Focus | Behaviour Management | Maintain Achievements** to display the **Find Achievements** browser.

2. Select an item from one or more of the following drop-down lists to filter the list of achievements: **Type** (e.g. **Excellent Effort**), **Activity** (e.g. **Science**), **Year Group**, **Class**, **House** and **Tier**. Users in Secondary schools can also search by **Reg Group**.
3. Define the date range of the search by:
 - selecting the **Date Range** radio button then entering the required date range in the **From** and **To** fields, or selecting from the Calendar. The default date range is from today to the last day of the current academic year.
 - or
 - selecting the **Cycle** radio button then selecting the required date range from the drop-down list, e.g. **Year to Date**. The default date range is from the first day of the current academic year to today.
4. To search for achievements **Recorded By** a specific person, click the **Browser** button then search for and select the required person using the **Select person** dialog. This filter can be removed by clicking the **Delete Filter** button.
5. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all achievements on the date (or date range) specified.

Date	Type	Comments	Recorded By	Activity	Student Nos.
17/02/2012	Academic Achievement	Bryn was awarded best short story competition writer which was entered by several schools. Bryn was awar...		Science	1
02/02/2012	Academic Achievement	Well done to Mark who has learn't all of his 10 spellings and got 10/10 correct in his test today.		Literacy	1
19/01/2012	Academic Achievement	Well done to these students who did a mock run of a SATS English paper who scored 70% + . Extremely pl...		Literacy	17
18/01/2012	Academic Achievement	Class was given 20 Mental Maths questions to answer in 3 seconds the following students achieved 20 out ...		Numeracy	7
10/01/2012	Academic Achievement	Class took part in History of the Page Day - The Great Fire of London. These students are commended for t...		History	9
12/12/2011	Academic Achievement	These students all scored 30/30 in Year 6, in a 5 second Mental Maths Challenge test. Excellent work well ...		Numeracy	11

A summary of each achievement is displayed in the results area, including the **Date** of the achievement, the achievement **Type**, the associated **Activity** and the number of pupil/students involved (**Student Nos**). The search results are displayed in reverse chronological order, so the most recent achievement is displayed at the top of the list.

- Highlight the achievement you wish to view or edit then click the **Open** button to display its details on the **Achievement** page. If you cannot find the required record, click the **New** button to display the **Achievement Details** page.

*NOTE: It is also possible to view an achievement from a pupil/student's record (via **Focus | Pupil (or Student) | Pupil (or Student) Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all achievements linked to this pupil/student by navigating to the **Achievement** panel.*

Adding / Editing an Achievement

- Select **Focus | Behaviour Management | Maintain Achievements** to display the **Find Achievements** browser.
- Search for an existing achievement (please see *Searching for Existing Achievements* on page 383) then click the **Open** button to edit its details on the **Achievement** page or click the **New** button to display the **Achievement Details** page.

1 Details

Type Choir Participation Points Defined 1

Additional Types

Description	Points
Excellent Effort	1

New
 Delete

Date 14/12/2011 Activity Type Music

Comments

Well done to the pupils who took part in the school Choir Concert and have been in practice with the school Choir Club. It was a wonderful evening enjoyed by all.

Recorded On 14/12/2011

Recorded By Mrs Gillian Grosvenor

2 Staff Involved

Name	Role
Mrs Gillian Grosvenor	

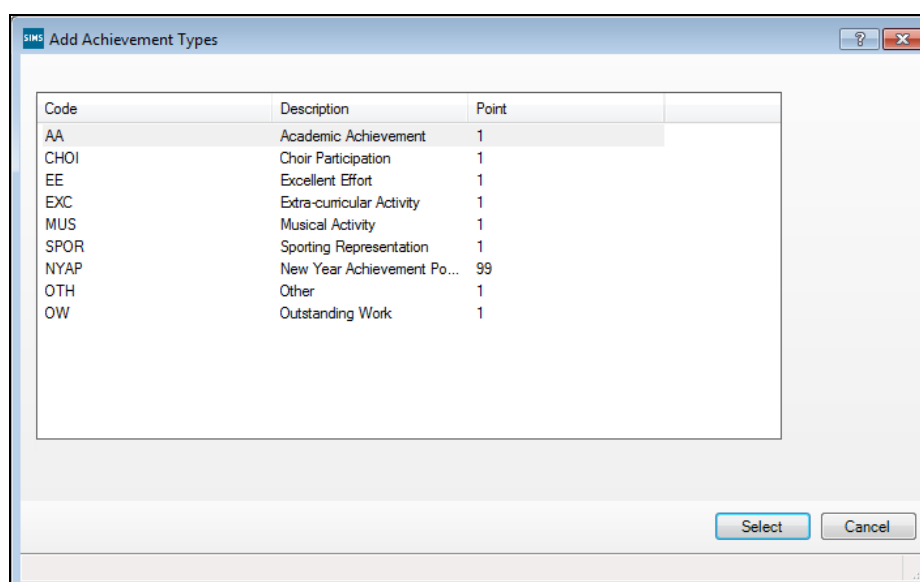
New
 Open
 Delete

3 Students Involved

Name	Points	Year	Class	House
Liz Aaron	2	1	PINE	
Samantha Acton	2	4	4ES	
Laura Adams	2	R	ELM	
Kari Americana	2	3	3CB	
Rosanna Amos	2	4	4SL	
Paul Andrews	2	4	4SL	

New
 Open
 Remove
 Send

3. Select the required achievement **Type** from the drop-down list, e.g. **Choir Participation**. The **Points Defined** field displays the default value assigned to the achievement type and cannot be edited.
4. Additional achievement types can be added to the achievement record. For example, a pupil/student may have displayed excellent effort in their greeting of other pupil/students on a school visit. In this case, a school visit achievement can be set up, with a second achievement type of excellent effort added to the record. To add additional achievement types, click the **New** button adjacent to the **Additional Types** table to display the **Add Achievement Types** dialog.



5. Highlight the required achievement type. Multiple achievement types can be selected by holding the **Ctrl** key and clicking each type. Click the **Select** button to return to the **Achievement Details** page, where the details of any added achievement types are displayed in the **Additional Types** table. Any unwanted additional types can be removed by highlighting them then clicking the **Delete** button adjacent to the table.
 6. For a new achievement record, the **Date** of the achievement defaults to today. Amend the date if required, or click the **Calendar** button then select the required date.
 7. If applicable, select the **Activity Type**, e.g. **Music**.
 8. Enter any **Comments** about the achievement.
 9. For a new achievement record, the **Recorded On** field defaults to today's date. For an existing record, this field displays the date on which the achievement was initially recorded. This can be amended by editing the date or by clicking the **Calendar** button then selecting the required date.
- The name of the person recording the achievement is displayed in the **Recorded By** field.

Recording the Staff Involved in the Achievement

Once the record is saved for the first time, the **Staff Involved** panel displays the name of the user who is recording the achievement.

1. To specify additional or alternative members of staff involved in the achievement, either highlight the required member of staff in the **Staff Involved** panel then click the **Open** button to display the **Edit Achievement Staff** dialog or click the **New** button to display the **New Achievement Staff Link** dialog.

2. Click the **Browser** button adjacent to the **Staff** field to display the **Select person** dialog.

3. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
4. Highlight the required member of staff then click the **OK** button to return to the **New Achievement Staff Link** dialog.
5. Select the required **Role** from the drop-down list, e.g. **Head of Department** then click the **OK** button to return to the **Achievement** page. The selected member of staff is displayed in the **Staff Involved** panel.

Name	Role
Mr Carl Brooks	Head of Department

6. Repeat this process for any other members of staff involved in the achievement.
7. To remove a member of staff, highlight them then click the **Delete** button.

Recording the Pupil/Students Involved in the Achievement

1. To specify the pupil/students involved in the achievement, click the **New** button in the **Students Involved** panel to display the **Select Students** dialog.

2. Enter any required search criteria or leave the fields blank to display all pupil/students then click the **Search** button.
3. Highlight the required pupil/student. Multiple pupil/students can be selected by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key then clicking to select a block of pupil/students.

Name	Year Group	Class	House	Gender	Admission Number
Aaron, Chris	1	PINE		Male	001102
Aaron, Liz	1	PINE		Female	001103
Aaron, Sophie	1	ASH		Female	001104
Abraham, Jane	2	2GH		Female	001041
Ackton, Stan	5	5BB		Male	000842
Ackton, Stephen	1	ELM		Male	001175
Acton, Jordan	3	3TO		Male	000981
Acton, Samantha	4	4ES		Female	001011
Adams, Adam	2	2JB		Male	001122
Adams, Laura	R	ELM		Female	001235
Adasheji, Mohammed	1	PINE		Male	001176
Adebayor, Emmanuel	3	3CB		Male	001068
Adedeji, Payal	6	6VC		Male	000797
Affleck, Alexis	5	5DT		Female	000843

4. Click the **OK** button to display the selected pupil/students in the **Add Students Involved** dialog.

Name	Gender	Points	Parents / Carers Informed	Award Given	Award Date	Awarded By
Chris Aaron	Male	1				
Liz Aaron	Female	1				
Mohammed Ada...	Male	1				

5. Additional pupil/students can be added by clicking the **Add** button to display the **Select Students** dialog then repeating steps 2 to 4. Pupil/students added in error can be removed by highlighting them then clicking the **Remove** button.

For each pupil/student involved:

- The **Points** field displays the default number of points awarded for the selected achievement(s). The default points value is allocated to every pupil/student selected. Additional or fewer points can be applied to individual pupil/students by clicking in the cell then overtyping the value.
- Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents/Carers Informed** drop-down list.
- If applicable, select the **Award Given** from the drop-down list, e.g. **Commended**, **Points Awarded**, etc.
- Enter the **Award Date** in the cell or click in the cell then select the required date from the drop-down list.
- To select the member of staff who presented the award and to populate the **Awarded By** field, click the **Awarded By** button to display the **Select person** dialog, search for and highlight the required person then click the **OK** button to return to the **Add Students Involved** dialog.

TIP: It is possible to select multiple pupil/students in the **Add Students Involved** dialog by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Award Given** from the drop-down list and all highlighted pupil/students are assigned the selected **Award Given**. This also applies to the **Points** and **Parents/Carers Informed** drop-down lists.

Name	Gender	Points	Parents / Carers Informed	Award Given	Award Date	Awarded By
Chris Aaron	Male	2	Email	Headteacher...	26/06/2012	Mrs Gillian Grosv...
Liz Aaron	Female	1	Email	Certificate	26/06/2012	Mrs Gillian Grosv...
Mohammed Ada...	Male	1	Email	Certificate	26/06/2012	Mrs Gillian Grosv...

6. When all the necessary details have been entered, click the **OK** button to return to the **Achievement** page. The details of all pupil/students involved are displayed in the **Students Involved** panel.

3 Students Involved						New Open Remove Send
Name	Points	Year	Reg	House		
Chris Aaron	2	1	PINE			
Liz Aaron	1	1	PINE			
Mohammed Adasheji	1	1	PINE			

7. If you have added a pupil/student to the **Students Involved** panel in error, highlight them and click the **Delete** button to remove them.

14 | Recording Achievements

- To edit the individual achievement details of a pupil/student added in step 5, highlight their name then click the **Open** button to display the **Edit Achievement Student** dialog. To edit the behaviour details of multiple pupil/students, highlight their names then click the **Open** button to display the **Edit Students Involved** dialog.

Edit Achievement Student - Chris Aaron

Pupil Details

Pupil: Chris Aaron

Points: 2

Award Given: Headteacher Commendation

Date of Award: 26/06/2012

Parents / Carers Informed: Email

Awarded By: Mrs Gillian Grosvenor

Select Staff

Notes / Documents

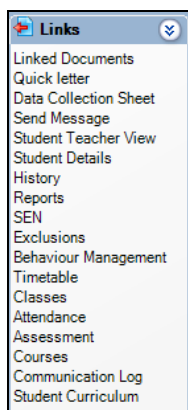
Attachment	Summary	Type	Owner	Last Modified On

New
Open
Delete

OK Cancel

- Attach any **Notes / Documents** such as a copy of the letter sent to the parent/guardians, if required.
- Click the **OK** button to confirm the details and return to the **Achievement** page.
- Click the **Save** button to save your changes.

The **Links** panel is displayed on the right-hand side of the **Achievement** page. This panel is used to access various areas of SIMS relating to the pupil/student highlighted in the **Students Involved** panel. For example, highlighting Chris Aaron then clicking the **Pupil Details** link displays Chris' full details on the **Pupil (or Student) Details** page, whereas any exclusions recorded against him can be displayed by clicking the **Exclusions** link, etc (please see *Using the Pupil/Student Links Panel* on page 145).



More Information:

Attaching a New Note/Document on page 147

Saving the Achievement

Once all the required information has been entered, click the **Save** button to save the record.

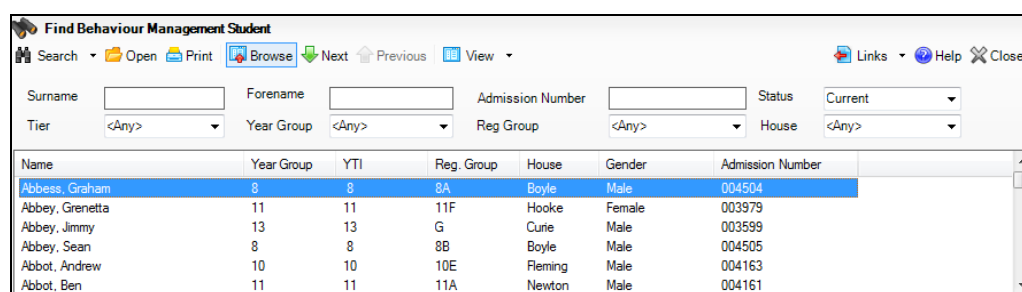
Recording an Individual Pupil/Student Achievement

This section describes how to record or edit an achievement for an individual pupil/student. One or more documents can be linked to the achievement record so that the required supplementary information can also be recorded.

It is also possible to record an achievement then identify the pupil/students involved (please see *Adding/Editing an Achievement* on page 384).

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.

*NOTE: It is also possible to add achievements via the **Links** panel on the **Pupil (or Student) Details** page (via **Focus | Pupil (or Student) | Pupil (or Student) Details**). Click the **Behaviour Management** hyperlink in the **Links** panel to display the **Behaviour Management** page.*



Name	Year Group	YTI	Reg. Group	House	Gender	Admission Number
Abbess, Graham	8	8	8A	Boyle	Male	004504
Abbey, Grenetta	11	11	11F	Hooke	Female	003979
Abbey, Jimmy	13	13	G	Curie	Male	003599
Abbey, Sean	8	8	8B	Boyle	Male	004505
Abbot, Andrew	10	10	10E	Fleming	Male	004163
Abbot, Ben	11	11	11A	Newton	Male	004161

14 | Recording Achievements

2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.

1 Academic Year
 Academic Year Academic Year 2011/2012

Achievements Points 101 Behaviour Points 5 Net Points 96
 No. of Detentions Recorded 1 No. of Report Cards 0 No. of Interventions 0

2 Achievement

Date	Type	Points	Comments	Award	Award Date
28/09/2011	Excellent Effort	1	All students took part...	Commended	28/09/2011
01/09/2011	New Year Achieve...	100	Points awarded as a...	Points Awarded	01/09/2011

New
 Open
 Delete

3 Behaviour

Date	Type	Role	Points	Comments	Action	Action Date
01/03/2012	Damage to Prop...		2	Sat in back two ...	Detention	01/03/2012
23/01/2012	Not equipped for...		1	Second time has...	Discussed with ...	23/01/2012
19/09/2011	Inadequate Wor...		1	Not paying atten...	Discussed with ...	19/10/2011
05/09/2011	Homework		1	Spellings had cl...	Discussed with ...	05/09/2011

New
 Open
 Delete

4 Detention

Date	Location	Reason	Attended	Reason Not Attended
01/03/2012	J2	Damage to Property	Attended	

Open

5 Report Card

Reason for Report	Start Date	End date	Active	Additional Comments

New
 Open
 Delete

3. Click the **Achievement** hyperlink to display the **Achievement** panel.

2 Achievement

Date	Type	Points	Comments	Award	Award Date
19/10/2011	Choir Participation	2	The school was invit...	Headteacher Co...	19/10/2011
01/09/2011	New Year Achieve...	100	Points awarded as a...	Points Awarded	01/09/2011

New
 Open
 Delete

4. Click the **New** button to display the **Add Achievement** dialog. Alternatively, highlight an existing achievement then click the **Open** button to display the **Edit Achievement** dialog, which you can use to edit the details.

Recording Achievement Details

1. Complete the information in the **Achievement Details** panel (please see *Adding/Editing an Achievement* on page 384).
2. Click the **OK** button to return to the **Behaviour Management** page.

IMPORTANT NOTE: If you edit the **Achievement Details** of any pupil/student who is part of an achievement involving multiple pupil/students (please see *Adding/Editing a Behaviour Incident* on page 353) and click the **OK** button, a message warns you that **Any changes made will apply to the other students linked to the Achievement**. Click the **Yes** button to update the change across all linked pupil/student's achievement details. Alternatively, click the **No** button to return to the **Add (or Edit) Achievement** dialog without saving the change.

Recording the Pupil / Student Details

1. In the **Pupil (or Student) Details** panel, the **Points** field displays the default number of points awarded for the selected achievement type(s). The default points value is allocated to every pupil/student selected. This value can be amended according to the level of achievement, if required.

2. Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents/Carers Informed** drop-down list.
3. Select the **Award Given** from the drop-down list, e.g. **Headteacher Commendation**.
4. The **Date of Award** defaults to today's date but can be amended, if required. Enter the date or click the **Calendar** button then select the required date.
5. Select the member of staff who presented the award and to populate the **Awarded By** field by clicking the **Select Staff** button to display the **Select person** dialog. Search for and highlight the required person then click the **OK** button to return to the **Add (or Edit) Achievement** dialog.
6. To send a message regarding the pupil/student to other members of staff, click the **Send** button to display the **Send Message** dialog, with the selected pupil/student displayed in the **Message** field (please see *Sending General Messages* on page 46).

Recording the Other Staff Involved

Once the record is saved for the first time, the **Other Staff Involved** panel displays the name of the user who is recording the achievement.

1. Complete the information in the **New Achievement Staff Link** panel.
2. Click the **OK** button to return to the **Behaviour Management** page (please see *Recording the Staff Involved in the Achievement* on page 386).

Recording Notes/Documents

It is possible to attach any files or documents, such as a pupil/student's letter of commendation sent by the headteacher to the pupil/student's parent/guardians, etc.

Add a note/document (please see *Attaching a New Note/Document* on page 147) then click the **OK** button to return to the **Add (or Edit) Achievement** dialog. The note, together with any associated attachment, is displayed in the **Notes/Documents** panel.

Notes/Documents						
Attachment	Summary	Type	Owner	Last Modified On		
	Letter of Commendation	Letter		27/06/2012		
						New
						Open
						Delete

Saving the Achievement

1. Click the **OK** button to return to the **Behaviour Management** page. The achievement is displayed in the **Achievement** panel.

2 Achievement							
Date	Type	Points	Comments	Award	Award Date		
19/10/2011	Choir Participation	2	The school was invit...	Headteacher Co...	19/10/2011		
							New
							Open
							Delete

2. Click the **Save** button to save the achievement.

The **Academic Year** panel displays the accumulated points total for all events recorded against this pupil/student for the selected academic year and serves as a useful overview of a pupil/student's conduct at your school. The **Net Points** field displays the total points attributed to the pupil/student as a result of subtracting the total behaviour points from the total achievement points. For example, if a pupil/student has accumulated 8 achievement points and 5 behaviour points, the **Net Points** total is 3.

1 Academic Year					
Academic Year		Academic Year 2011/2012 ▼			
Achievements Points	101	Behaviour Points	5	Net Points	96
No. of Detentions Recorded	1	No. of Report Cards	0	No. of Interventions	0

A **Net Points** score above zero indicates generally positive behaviour, whereas a score below zero indicates generally negative behaviour.

Deleting Achievements

1. Select **Focus | Behaviour Management | Maintain Achievements** to display the **Find Achievements** browser.
2. Search for and highlight the required achievement then click the **Delete** button.
3. Confirm that you wish to delete the achievement record by clicking the **Yes** button.

Reporting on Achievements

Achievements can be reported on using SIMS reporting. A wide range of pre-defined achievement reports is available via Reports | Run Report. For more information on the latest pre-defined reports, please refer to the *SIMS Pre-Defined Reports Catalogue*.

15 | Recording Detentions

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Introduction

Schools can use detentions as part of their Behaviour Policy. Detentions can vary in severity from missing a break during the day to being detained after school. For serious offences, pupil/students can be referred to the Head Teacher, who may decide to monitor them after school on a weekly basis. Recurring detentions can be set up in such cases.

Detentions can be imposed by a Head Teacher or another teacher with sufficient authorisation. Prior to arranging a detention, teachers should take account of:

- the pupil/student's age
- the Special Educational Needs of the pupil/student
- their religious requirements
- whether the parent/guardians can, within reason, arrange for the pupil/student to return home from school after the detention.

Although detentions form part of a school's Behaviour Policy, the school must give the parent/guardians sufficient written notice (usually at least 24 hours) of a detention scheduled to take place during lunchtime or after school, so that they are given time to notify the school of any issues that the detention might cause.

Written notification must be sent to parent/guardians to inform them:

- that the pupil/student has been given a detention
- why the detention was given
- when the detention is taking place
- where the detention is taking place
- the duration of the detention.

Schools are required to keep a written record of any detentions given for legal reasons, together with the reason(s) for imposing the detention, in case there is a legal challenge brought by parent/guardians.

Methods of Recording Detentions

To record a detention and to indicate where it is taking place, rooms must be set up in SIMS. This ensures that you can inform parents when the detention is taking place, where it is scheduled to take place and its duration. The types of detention employed by your school must be defined prior to detentions being recorded.

There are four methods of recording a detention:

- Record a behaviour incident for an individual pupil/student then add the detention in the incident record (please see *Adding/Editing an Individual Pupil/Student Behaviour Incident* on page 371). For this method, use **Focus | Behaviour Management | Student Behaviour** and **Focus | Behaviour Management | Maintain Behaviour Incidents**.
- Record a behaviour incident for several pupil/students then add the detention at the same time (please see *Recording Behaviour Incidents* on page 349). For this method, use **Focus | Behaviour Management | Maintain Behaviour Incidents**.
- Record a detention for one or more pupil/students then add one or more new behaviour incidents (please see *Adding/Editing Detentions* on page 402). For this method, use **Focus | Behaviour Management | Maintain Detentions**.
- Record a behaviour incident for one or more pupil/students, set up a new detention (please see *Adding/Editing Detentions* on page 402) then link the existing behaviour incidents to the detention. For this method, use **Focus | Behaviour Management | Student Behaviour** or **Focus | Behaviour Management | Maintain Behaviour Incidents**, then **Focus | Behaviour Management | Maintain Detentions**.

WARNING: If a detention is added via **Focus | Behaviour Management | Maintain Detentions** and it is not linked to any appropriate existing behaviour incidents, when the record is saved a new behaviour incident is created for each of the associated pupil/students. Therefore when creating a detention via this route, you must link any existing behaviour incidents to the detention before saving the record (please see *Linking Existing Behaviour Incidents to a Detention* on page 410).



Additional Resources:

Adding/Editing Rooms in the *Setting up and Administering SIMS* handbook
Setting up Behaviour Management chapter of the *Setting Up and Administering SIMS* handbook

Setting up Detention Types

When recording detentions, some of the values available from drop-down lists can be edited to meet the specific needs of your school.

You can re-arrange the order in which detention types are displayed in lists so that the most frequently recorded detention types can be accessed more easily. Additionally, the types of detention that can be recorded can be amended and recurring detentions can be set up using detention types.



Additional Resources:

Setting Up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook

Searching for an Existing Detention

Before recording the details of a detention, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific detentions, e.g. you can view a list of all the detentions that have arisen by location in the current academic year. Alternatively, you can view a detention from the pupil/student record of one of the pupil/students involved (via **Focus | Pupil (or Student) | Pupil (or Student) Details**).

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** browser.

Detention Date	Start Time	Type	Year Group	Staff Allocated	Location	Number of Detainees	Recorded By

2. Select the required **Detention Type** from the drop-down list, e.g. **Headteacher's Detention**, and the **Year Group** to which the detention relates.
3. Enter the **Surname** and **Forename** of one of the detainees, if required.
4. Search for the detention by **Location** by clicking the adjacent **Browser** button to display the **Room** dialog. This filter can be removed by clicking the **Clear Location** button.

Short Name	Long Name	Establishment

- a. Enter the **Short Name** or **Long Name** of the required room, or select its **Location** from the drop-down list.
- b. Click the **Search** button to search for the required room.
- c. Highlight the required room then click the **OK** button to return to the **Find Detentions** browser, where the **Location** is displayed.

5. Search for the detention by **Main Staff Assigned** by clicking the adjacent **Browser** button then searching for the required person using the **Select person** dialog. This filter can be removed by clicking the **Clear Staff Assigned** button.

- a. Enter the **Surname** or **Forename** of the required person, or select their **Role** from the drop-down list.
 - b. Click the **Search** button to search for the required person.
 - c. Highlight the required person then click the **OK** button to return to the **Find Detentions** browser, where the **Main Staff Assigned** is displayed.
6. Select the **Start Time** of the detention from the drop-down list, if required.
7. Define the date range for the search by:
 - selecting the **Date Range** radio button then entering the required date range in the **From** and **To** fields, or selecting from the Calendar. The default date range is from today to the last day of the current academic year.
 - or
 - selecting the **Cycle** radio button then selecting the required date range from the drop-down list, e.g. **Year to Date**. The default date range is from the first day of the current academy year to today.

The search results are displayed in descending **Date** order when searching by **Cycle**, so the most recent behaviour incident is displayed at the top of the list.

8. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all detentions on the date (or date range) specified.

The screenshot shows the 'Find Detentions' window with the following search filters:

- Detention Type: <Any>
- Year Group: <Any>
- Date Range: From 19/09/2016 To 31/08/2017
- Surname:
- Forename:
- Location: <Any>
- Main Staff Assigned: <Any>
- Start Time:
- Recorded By: <Any>

The results table displays the following data:

Detention Date	Start Time	Type	Year Group	Staff Allocated	Location	Number of Detainees	Recorded By
21/09/2016	12:00	SLT Detention			Humanities Room 1	5	Mr Adrian Blacker
23/09/2016	12:00	SLT Detention			Humanities Room 1	0	Mrs Anita Abell
28/09/2016	15:30	SLT Detention			Humanities Room 1	0	Mrs Anita Abell

A summary of each detention is displayed in the results area, including the **Detention Date** and **Start Time**, the **Location**, its **Status** and the number of pupil/students involved (**Number of Detainees**). The search results are displayed in ascending **Detention Date** order, so the most recent detention is displayed at the bottom of the list.

9. Highlight the detention you wish to view or edit then click the **Open** button to display its details. If you cannot find the required record, click the **New** button to display the **Detention Details** page.

*NOTE: It is also possible to view a detention from a pupil/student's record (via **Focus | Pupil (or Student) | Pupil (or Student) Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all detentions linked to this pupil/student by navigating to the **Detention** panel.*

Adding /Editing Detentions

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** browser.
2. Search for an existing detention (please see *Searching for an Existing Detention* on page 399) then click the **Open** button to edit its details or click the **New** button to display the **Detention Details** page.

1 Details

Detention Type: Location:

Date: Day:

Start Time: End Time:

Frequency: Year Group:

Main Staff Assigned: Optimum Number Of Attendees: Fixed: ☐

Recorded On: Recorded By:

2 Linked Students

Full Name	Incident Date	Staff Name	Reason for Detention	Attended
Joe Agathocleo...	01/06/2012	Grosvenor, Mrs...	Damage to Property	Not Recorded
Carina Ahmad	01/06/2012	Grosvenor, Mrs...	Damage to Property	Not Recorded

New Open Delete Letter

3 Linked Activities

Activities:

Add Remove

4 Other Staff Assigned

Name:

New Delete

5 Notes/Documents

Attachment	Summary	Type	Owner	Last M...

New Open Delete

3. Select the required **Detention Type** from the drop-down list, e.g. **Headteacher's Detention**. If you are editing an existing detention record, this field cannot be edited.

Once the **Detention Type** is selected, the following fields are populated automatically: **Location**, **Day**, **Start Time**, **End Time**, **Frequency** and **Year Group**. These default values are defined in the detention type (via **Tools | Setups | Behaviour Management | Detention Type**). The **Day** and the **Frequency** cannot be edited but the remaining fields can. For example, a detention of a certain type is usually held in the same room but for one instance, it must be held elsewhere due to refurbishment so the default room can be overwritten with an alternative.

4. Select the **Location** of the detention by clicking the adjacent **Browser** button to display the **Room** dialog.

- a. Enter the **Short Name** or **Long Name** of the required room, or select its **Location** from the drop-down list.
 - b. Click the **Search** button to search for the required room.
 - c. Highlight the required room then click the **OK** button to return to the **Detention Details** page, where the **Location** is displayed.
5. Enter the **Date** of the detention or click the **Calendar** button then select the required date.
6. Edit the detention **Start Time** and **End Time** by selecting from the drop-down lists, if required.
7. Select the **Main Staff Assigned** to the detention by clicking the adjacent **Browser** button then searching for the required person using the **Select person** dialog. This member of staff can be removed by clicking the **Clear Staff Assigned** button or by repeating this step and selecting another person.

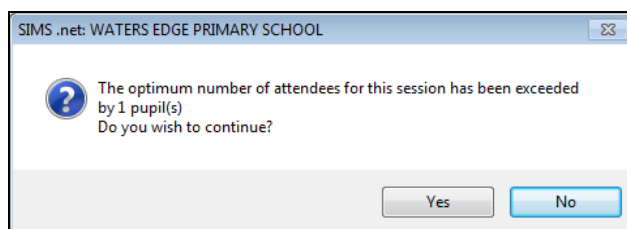
- a. Enter the **Surname** or **Forename** of the required person, or select their **Role** from the drop-down list.
 - b. Click the **Search** button to search for the required person.
 - c. Highlight the required person then click the **OK** button to return to the **Detention Details** page, where the **Main Staff Assigned** is displayed.

8. The **Optimum Number Of Attendees** field defaults to the value set in the **Maximum Group Size** field of the selected room (via **Focus | School | Rooms**). If the **Maximum Group Size** field is blank, the **Optimum Number Of Attendees** field will default to blank. This value can be edited for the selected detention session only (i.e. it does not affect the default value assigned to the room).
9. If you wish to enforce a rule that ensures no more than the **Optimum Number Of Attendees** attend the detention session, select the **Fixed** radio button.

IMPORTANT NOTES: The aggregate of the content of the **Optimum Number Of Attendees** field and the selection or deselection of the **Fixed** radio button determines what happens when the record is saved:

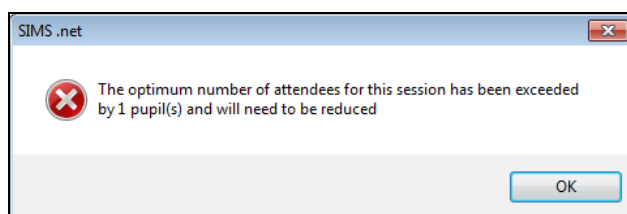
If the number of **Linked Students** is less than or equal to the **Optimum Number Of Attendees**, the record is saved.

If the number of **Linked Students** is greater than the **Optimum Number Of Attendees** and the **Fixed** check box is deselected, the following message is displayed.



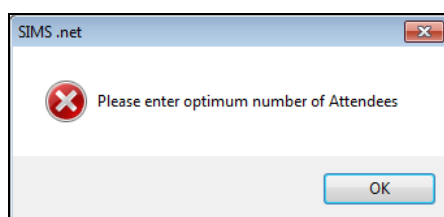
It is still possible to save the record because the rule governing the number of attendees has not been applied. Click the **Yes** button to save the record or click the **No** button then change the number of **Linked Students** or perhaps the **Optimum Number Of Attendees** for this detention session only.

If the number of **Linked Students** is greater than the **Optimum Number Of Attendees** and the **Fixed** check box is selected, the following message is displayed.



It is not possible to save the record because the rule governing the number of attendees has been applied. Click the **OK** button then change the number of **Linked Students** or perhaps the **Optimum Number Of Attendees** for this detention session only.

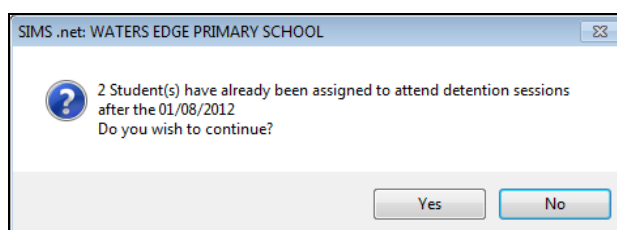
If the **Optimum Number Of Attendees** is blank and the **Fixed** check box is selected, the following message is displayed.



*It is not possible to save the record. Click the **OK** button then enter the **Optimum Number Of Attendees**.*

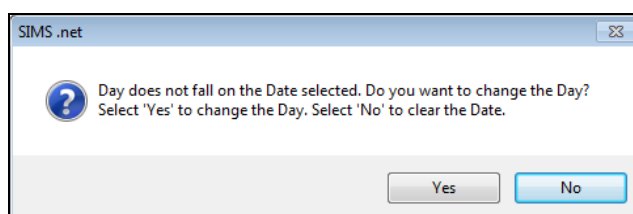
10. The **Recorded On** field defaults to today but can be edited by clicking the **Calendar** button then selecting the required date.
11. The **Recorded By** field displays the name of the current SIMS user and cannot be changed.
12. Click the **Save** button before completing the remaining panels on the **Detention Details** page.

*NOTES: If one or more of the **Linked Students** scheduled to attend the detention session have also been assigned to any future detention session, the following message is displayed.*



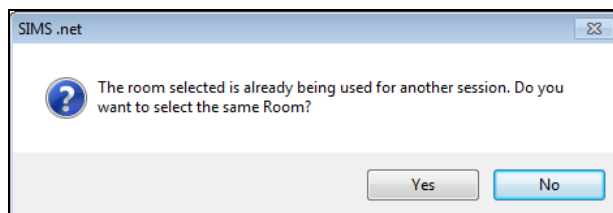
*Click the **Yes** button to save the record or click the **No** button if you wish to investigate this prior to assigning the pupil/students to the detention session.*

*If you change the **Date** of the **Detention** so that it no longer falls on the specified **Day** of the week (determined by the **Detention Type**), the following message is displayed.*



*Click the **Yes** button to change the **Day** displayed and select the required Date before saving the details again (this affects the selected definition only. The definition of the original Detention Type, from which this detention session was created, is not affected). Alternatively, click the **No** button to clear the **Date** field and select the correct date before saving the details again.*

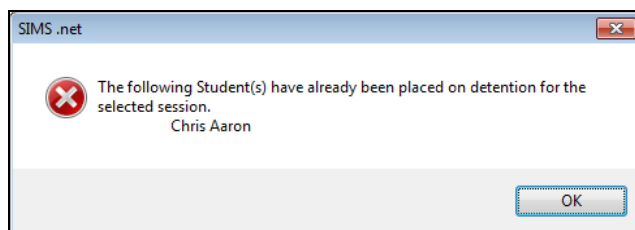
If you select a location that has already been defined in a different detention session to be held at the same time, the following message is displayed when you save the record.



*Click the **Yes** button to continue, if required.*

*If you select a **Main Staff Assigned** who has already been defined in a different detention session to be held at the same time, it is not possible to save the record. Instead, a message is displayed in the Status Bar at the bottom of the page.*

If you select a pupil/student to attend a detention session who is already scheduled to attend a different detention session to be held at the same time (including overlapping detention sessions), the following message is displayed when you attempt to save the record. The record will not be saved.



Additional Resources:

Setting Up Behaviour Management chapter of the *Setting Up and Administering SIMS* handbook

Assigning Pupil/Students to the Detention

1. To specify the pupil/students who will be attending the detention, click the **New** button in the **Linked Students** panel to display the **Select Students** dialog.

*NOTE: When accessing the **Detention Details** page from a pupil/student's behaviour incident record (by clicking the **Behaviour Management** hyperlink in the **Links** panel), it is not possible to assign additional pupil/students to a detention. Instead, you should assign additional pupil/students via **Focus | Behaviour Management | Maintain Detentions**.*

The screenshot shows the 'Select Students' dialog box. It features a search bar with 'Surname' and 'Forenames' text inputs, and dropdown menus for 'House', 'Tier', 'Year Group', 'Class', and 'Academic Year'. The 'Academic Year' is currently set to 'Academic Year 2011/2012'. Below the search filters is a table with the following columns: Name, Age, Gender, Year, Class, House, Ad No, and Religion. The table is currently empty. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

2. Enter any required search criteria or leave the fields blank to display all pupil/students then click the **Search** button.

15 | Recording Detentions

- Highlight the required pupil/student. Multiple pupil/students can be selected by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key then clicking to select a block of pupil/students.

Select Students

Search Print

Surname: Forenames: House: <Any>

Tier: <Any> Year Group: <Any> Class: <Any> Academic Year: Academic Year 2011/2012

Name	Age	Gender	Year	Class	House	Ad No	Religion
Aaron, Chris	6 years, 9 months	Male	1	PINE		001102	Christian
Aaron, Liz	6 years, 9 months	Female	1	PINE		001103	Christian
Aaron, Sophie	6 years, 9 months	Female	1	ASH		001104	Christian
Abraham, Jane	7 years, 1 month	Female	2	2GH		001041	Christian
Ackton, Stan	10 years, 6 month...	Male	5	5BB		000842	Christian
Ackton, Stephen	6 years, 3 months	Male	1	ELM		001175	Christian
Acton, Jordan	8 years, 4 months	Male	3	3TO		000981	
Acton, Samantha	9 years, 3 months	Female	4	4ES		001011	
Adams, Adam	6 years, 9 months	Male	2	2JB		001122	Christian
Adams, Laura	5 years, 3 months	Female	R	ELM		001235	Christian
Adasheji, Mohammed	6 years, 4 months	Male	1	PINE		001176	Hindu
Adebayor, Emmanuel	8 years, 4 months	Male	3	3CB		001068	
Adedeji, Payal	11 years, 3 mont...	Male	6	6VC		000797	Muslim
Affleck, Alexis	9 years, 11 mont...	Female	5	5DT		000843	Christian

OK Cancel

433 matches found

- Click the **OK** button to return to the **Detention Details** page, where the selected pupil/students are displayed.

2 Linked Students					
Full Name	Incident Date	Staff Name	Reason for Detention	Attended	
Chris Aaron	28/06/2012	Avery, Mrs Helen	<None>	Not Recorded	New
Liz Aaron	28/06/2012	Avery, Mrs Helen	<None>	Not Recorded	Open
Mohammed Ad...	28/06/2012	Avery, Mrs Helen	<None>	Not Recorded	Delete
					Letter

- For each pupil/student involved, the following information is displayed:
 - Their **Full Name**, the **Incident Date** and the name of the person who added them to the detention record (**Staff Name**).

IMPORTANT NOTE: Before selecting a **Reason for Detention**, please read the following topic (please see Recording the Reason for Detention on page 409).

- Select the pupil/student's **Reason for Detention** from the drop-down list, e.g. **Damage to Property**, **Defiance**, **Disruptive Behaviour**, etc.
- If applicable, indicate whether they have **Attended** the detention session by selecting from the drop-down list. This defaults to **Not Recorded** and should be changed only when the detention session has taken place.

TIP: It is possible to select multiple pupil/students in the **Linked Students** panel by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Reason for Detention** from the drop-down list and all highlighted pupil/students are given the selected **Reason for Detention**. This also applies to the **Attended** drop-down list.

6. Pupil/Students added in error can be removed by highlighting them then clicking the **Delete** button.



More Information:

Adding/Editing Detentions on page 402

Recording the Reason for Detention

- If you are recording a detention from a behaviour incident record by clicking the **Detention** button on either the **Behaviour Incident** page or the **Behaviour Incident Details** page (via **Focus | Behaviour Management | Maintain Behaviour Incidents**), the **Reason for Detention** displays the **Behaviour Type** saved for each pupil/student involved in the incident (please see *Adding/Editing a Behaviour Incident* on page 353). Here, changes can be made to the **Reason for Detention** without affecting the **Behaviour Type** saved in the behaviour incident record.
- If you are recording a detention on the **Detention Details** page (via **Focus | Behaviour Management | Maintain Detentions**), the **Reason for Detention** displayed in the **Linked Students** panel defaults to **<None>** because the detention is not yet linked to a behaviour incident.

Do not make any changes to the **Reason for Detention** before reading the following important note.

IMPORTANT NOTES for adding a detention via **Focus | Behaviour Management | Maintain Detentions**:

*The method of recording a **Reason for Detention** is determined by whether an associated behaviour incident has already been recorded.*

*If a behaviour incident has been created for the pupil/students involved in the detention, for each pupil/student click the appropriate **Reason for Detention** cell then select the reason from the drop-down list. When the record is saved, a behaviour incident is created automatically for each pupil/student and the **Reason for Detention** populates the **Behaviour Type** field of the behaviour incident record.*

*If behaviour incidents have already been created for the pupil/students you have added to the detention, involved in the detention, do not select the **Reason for Detention** from the drop-down list. Instead, you should link the existing behaviour incident to a detention (please see *Linking Existing Behaviour Incidents to a Detention* on page 410).*

TIP: It is possible to select multiple pupil/students in the **Linked Students** panel by holding the **Ctrl** key then clicking each pupil/student, or holding the **Shift** key to select a block of pupil/student. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Reason for Detention** from the drop-down list and all highlighted pupil/students are assigned the selected **Reason for Detention**. This also applies to the **Points** and **Parents/Carers Informed** drop-down lists.



More Information:

Creating Detention Letters on page 413

Linking Existing Behaviour Incidents to a Detention

If you add a detention using the **Detention Details** page (via **Focus | Behaviour Management | Maintain Detentions**), and the appropriate behaviour incident(s) have already been recorded separately and the pupil/students have been placed on the detention, the behaviour incidents must be linked to the detention.

WARNING: If you do not link the behaviour incident to the detention, duplicate behaviour incidents are created when the detention record is saved.

This section provides information on how to link existing behaviour incidents to a detention, when the behaviour incident and detention have been recorded separately.

1. Search for and select the required detention session (please see *Searching for an Existing Detention* on page 399).
2. In the **Linked Students** panel, highlight the pupil/student whose detention record you wish to view then click the **Open** button to display the **Edit Detained Student** dialog.

- Click the **Browse** button adjacent to the **Comments** field to display the **Select Behaviour Incidents** dialog.

- Search for and select the required behaviour incident (please see *Searching for Existing Behaviour Incidents* on page 351).

The **Comments** are inherited from the behaviour incident record, as is the **Incident Date**.

- If a behaviour incident has been linked to a detention in error, click the **Delete** button adjacent to the **Comments** field.

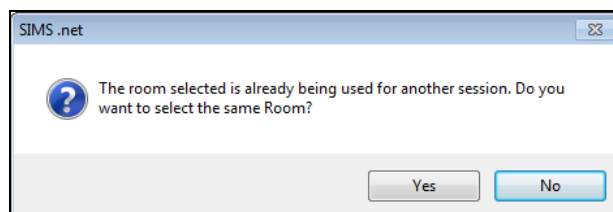


Delete button

By default, the **Added By** field displays the name of the staff member who is adding the record.

6. To change the member of staff, click the **Browser** button adjacent to the **Added By** field to display the **Select person** browser.

7. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
8. Highlight the required member of staff then click the **OK** button to return to the **Edit Detained Student** dialog.
9. Enter any other additional **Staff Comments**.
10. Click the **OK** button to return to the **Detention Details** page.
11. Repeat steps 2 to 10 for each pupil/student whose detention record you wish to link to a behaviour incident.
12. To send a letter to a pupil/student's parent/guardians, click the **Letter** button in the **Linked Students** panel (please see *Creating Detention Letters* on page 413). The **Letter** button is enabled only when the detention record has been saved.
13. Click the **Save** button to save the detention details. If you have selected a room that already has a detention session arranged at the same time as the session you are adding, the following message is displayed.



- Click the **Yes** button to confirm that you wish to use the same room and assign the pupil/students to this room.
- Click the **No** button to return to the **Detention Details** page, where you can edit the **Location** and **Save** the record.

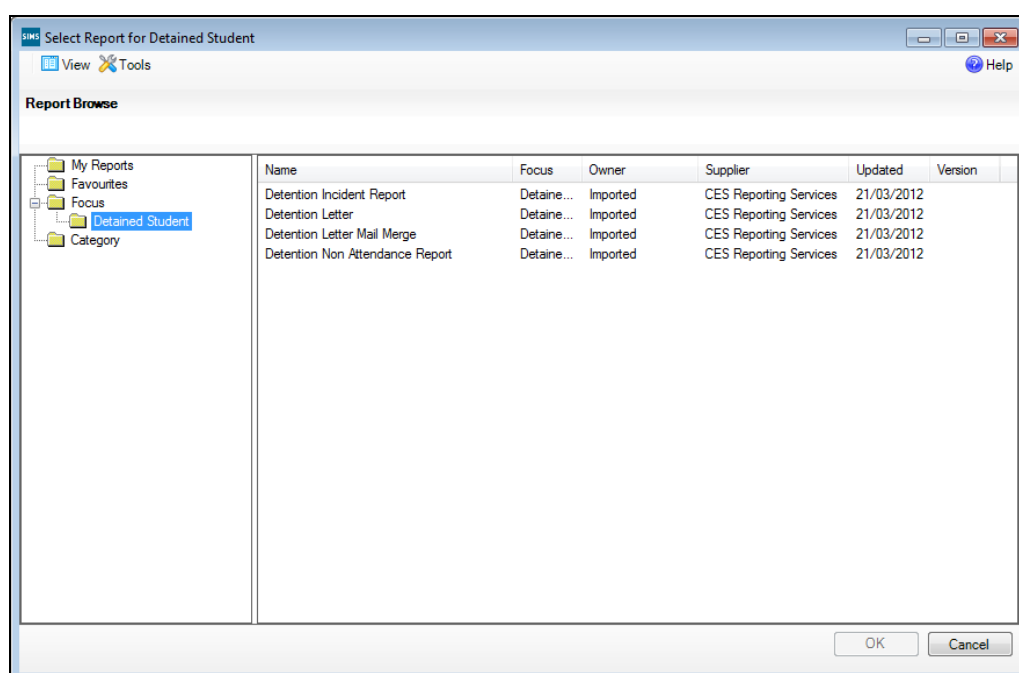
A range of message might be displayed when saving a detention record (please see *Adding/Editing Detentions* on page 402).

Creating Detention Letters

Once the detention details have been saved, detention letters can be created and sent to the parent/guardians of pupil/students associated with the detention.

***TIP:** By generating detention letters from the **Detention Details** page, only one detention letter can be created at a time and this is for the highlighted pupil/student. If you wish to produce a large number of detention letters, you are strongly advised to produce them by running the Detention Letter Mail Merge report outside of the **Detention Details** page (via **Reports | Run Report** then navigate to **Focus | Detained Student** in the **Report** browser). Running the report outside of the **Detention Details** page enables you to produce letters for all pupil/students scheduled to attend a detention session over a specified time period.*

1. Highlight the pupil/student for whom you wish to create a detention letter.
2. Click the **Letter** button in the **Linked Students** panel to display the **Select Report for Detained Student** dialog.



3. Navigate to the **Focus | Detained Student** folder. This folder displays all of the pre-defined detention reports.

4. Highlight the detention letter you wish to produce then click the **OK** button.

23 September 2015

Mr and Mrs A Abraham
122 The Rowans
Milton
Cambridge
Cambridgeshire
CB24 6ZA

Dear Mr and Mrs Abraham,

Jane Abraham Reg Group: 6KH

It is with regret that I am writing to inform you that due to Inadequate Work in Class which took place on 18 November 2015, I intend to keep your child for a period of 30 minutes. This will take place on Wednesday, 18 November 2015 from 12:30 to 13:00 in Headteacher's Office.

Please can you stress the importance to your child of attending this detention and make alternative arrangements for him/her to return home after the session. I would ask for you full co-operation in this matter.

If there is any reason why your child is unable to attend the detention at this time, please could you inform the school at your earliest convenience.

Yours sincerely,

Head Teacher

The content of the detention letter can be edited to incorporate the school's logo, etc. It is also possible to make changes to the text of the letter prior to distribution to parent/guardians.

Linking Activities

Specific activities or tasks, to be completed by the detained pupil/students, can be set up for the detention session. For example, detained pupil/students may be asked to complete a piece of written work.

1. Click the **Add** button in the **Linked Activities** panel to display the **Select Activity(ies)** dialog.

SIMS Select Activity(ies)

Activities

- Homework
- Community Service
- Special Assignment
- Additional Written Work
- Other

OK Cancel

The **Detention Activity** lookup determines the list of activities displayed. Additional types of detention activity can be added using Maintain Lookups (via **Tools | Lookups | Maintain**). This functionality enables you to amend the values to those that commonly occur in your school.

- Highlight one or more activities then click the **OK** button to associate them with the detention and return to the **Detention Details** page.

The **Linked Activities** panel is populated with the selected activities.

Assigning Additional Staff to a Detention

- Click the **New** button in the **Other Staff Assigned** panel to display the **Select person** dialog.

- Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
- Highlight the required member of staff. Multiple members of staff can be selected by holding the **Ctrl** key then clicking each person, or by holding the **Shift** key then clicking to select a block of people.
- Click the **OK** button to return to the **Detention Details** page, where the selected member(s) of staff are displayed.

- Click the **Save** button.

A range of messages might be displayed when saving a detention record (please see *Adding/Editing Detentions* on page 402).

Recording Notes/Documents

If the pupil/students completed a special assignment or additional written work during the detention, a copy of their work can be attached to the detention details.

1. Click the **New** button in the **Notes/Documents** panel to display the **Add/Note Document** dialog.
2. Add the note or document, as required (please see *Attaching a New Note/Document* on page 147).
3. Click the **Save** button.

A range of messages might be displayed when saving a detention record (please see *Adding/Editing Detentions* on page 402).

Recording Detention Attendance

Once a pupil/student has been linked to a detention, their individual detention record can be viewed and edited from the **Detention Details** page. Once the detention has taken place, a pupil/student's detention attendance can be recorded. It is also possible to assign to an alternative detention session for any pupil/student(s) who did not attend the scheduled session.

*NOTE: It is possible to record a pupil/student's attendance at a detention session only when the detention **End Time** has elapsed.*

1. Search for and select the required detention session (please see *Searching for an Existing Detention* on page 399).
2. From the **Linked Students** panel, click into the **Attended** column adjacent to each pupil/student name and select the appropriate option from the drop-down list.

*TIP: It is possible to select multiple pupil/students in the **Linked Students** panel by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Attended** status from the drop-down list and all highlighted pupil/students are given the selected **Attended** status. This also applies to the **Staff Name** and **Reason for Detention** drop-down lists.*

3. If a pupil/student has not attended the detention, highlight their name in the **Linked Students** panel then click the **Open** button to display the **Edit Detained Student** dialog.

Edit Detained Student: Joe Agathocleous

Detention-Student Link Details

Reason For Detention: Damage to Property

Attended: Not Recorded ☐ Attend Future Session

Reason for Non-Attendance:

Incident Date: 26/09/2011 Comments: The coach was left in a terrible state after the

Added By: Grosvenor, Mrs Gillian

Staff Comments:

OK Cancel

4. Complete all of the required information if it has not already been recorded.
5. A pupil/student's attendance at the detention can be recorded by selecting from the **Attended** drop-down list. Selecting **Not Attended** from the drop-down list enables you to enter a **Reason for Non-Attendance**.
6. If a pupil/student fails to attend the detention, enter the **Reason for Non-Attendance**, e.g. Illness.
7. To set up a future detention session for this pupil/student, select the **Attend Future Session** check box. This check box is available only if the **Attended** status is set to **Not Attended**.
8. The **Incident Date** defaults to today's date but can be changed by entering the date or by clicking the **Calendar** button then selecting a date.

15 | Recording Detentions

9. If you wish to link an existing behaviour incident to the selected pupil/student's detention record (or amend the existing behaviour incident link), click the **Browser** button adjacent to the **Comments** field to display the **Select Behaviour Incidents** dialog.

10. Enter or select any required search criteria or leave the fields blank to display all behaviour incidents for the selected pupil/student then click the **Search** button.
11. Highlight the required behaviour incident then click the **OK** button to return to the **Edit Detained Student** dialog, where the details of the behaviour incident are displayed in the **Comments** field.
12. If you link a behaviour incident in error, click the **Delete** button to remove the incident and the **Incident Date**.



Delete button

13. By default, the **Added By** field displays the name of the staff member who is adding the record. To change the name of the staff member adding the record, click the **Browser** button adjacent to the **Added By** field then search for and select the required person using the **Select person** browser.
14. Enter any **Comments** about the detention.
15. Click the **OK** button.
 - If the **Attend Future Session** check box has been selected, the **Add Detention Details for** dialog is displayed, enabling you to search for an existing detention, or add a new detention for the pupil/student to attend (please see *Adding/Editing Detentions* on page 402).
 - If the **Attend Future Session** check box has not been selected, the **Detention Details** page is displayed, where the new details are displayed in the **Linked Students** panel.
16. Click the **Save** button to save the details of the detention.

17. Create and distribute detention letters, if required (please see *Creating Detention Letters* on page 413).

Deleting a Detention Session

Class teachers can delete only detention sessions that they have set up themselves.

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** browser.
2. Search for the detention (please see *Searching for an Existing Detention* on page 399) you wish to delete then click the **Delete** button.
3. Confirm the deletion by clicking the **Yes** button.

16 | Creating Report Cards

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Introduction

As a means of promoting positive behaviour amongst pupil/students, children who misbehave persistently can be assigned performance targets that they must meet. Their behaviour in relation to these targets can be monitored over a specified period of time using a *report card*.

You may ask pupil/students to bring their report card to each lesson so that at the end of the lesson, class teachers can provide a brief comment or allocate points to indicate how the pupil/student has progressed towards the target(s) set. While on report, a pupil/student must adhere to all targets.

The majority of report cards are issued by Heads of Year or Pastoral Managers but generally speaking, class teachers are responsible for the administration and completion of report cards.

Report cards can be set up and maintained via the following menu routes:

- **Focus | Behaviour Management | Report Card**
- **Focus | Behaviour Management | Maintain Behaviour Incidents** (via the **Students Involved** panel)
- **Focus | Attendance (or Lesson Monitor) | Take Register**
- Many of the pupil/student routes, including the **Student Behaviour** routes (accessed by clicking the **Behaviour Management** link in the **Links** panel).

The information on the page displayed, together with the method of adding a report card, are the same regardless of the menu route used. This chapter discusses the process of creating a report card record via **Focus | Behaviour Management | Report Card**.

When a student is issued with a report card, this is indicated on the **Take Register** page (via **Focus | Attendance (or Lesson Monitor) | Take Register**) by the appearance of a @ symbol in the pupil/student's **Name** field and their row is displayed in red text.

A report card report can be produced to display report card details for one or more pupil/students over a specified date range.

Searching for an Existing Report Card

Before recording the details of a report card, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific report cards. Alternatively, you can view a report card from the pupil/student record (via **Focus | Pupil (or Student) | Pupil (or Student) Details**).

1. Select **Focus | Behaviour Management | Report Card** to display the **Find On Report Students** browser.

2. Enter the required pupil/student's **Surname** and **Forenames**, if required.
3. Select an item from one or more of the following drop-down lists to filter the list of report cards: **Status** (e.g. **Current**, return all pupil/students currently on report), **Academic Year**, **Tier**, **Year Group**, **Class** and **House**. Users in Secondary schools can search by **Reg Group** instead of **Class**.
4. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all report cards.

Name	Year Group	Class	House	Gender	Admission Number	Reason on Report	Start Date	End Date	Active	Current
Adedeji, Payal	6	6VC		Male	000797	Disruptive Behaviour	14/10/2011	19/07/2012	Yes	No
Agathocleous, Joe	6	6KH		Male	000805	Inadequate Work in Class	14/10/2011	28/10/2011	No	No
Clarke, Jenny	4	4SL		Female	000931	Homework	13/02/2012	17/02/2012	No	No
Dawson-Smith, Jessica	2	2GH		Female	001048	Truancy	27/02/2012	30/03/2012	No	No

A summary of each report card is displayed in the results area, including the **Name** of the pupil/student on report, the reason for them being on report (**Reason on Report**) and the **End date** of the on report period. The search results are displayed in **Name** order.

5. Highlight the report card you wish to view or edit then click the **Open** button to display its details on the **Report Card Details** page. If you cannot find the required record, click the **New** button to display the **New Report Card Details** page.

*NOTE: It is also possible to view a report card from a pupil/student's record (via **Focus | Pupil (or Student) | Pupil (or Student) Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all report cards linked to this pupil/student by navigating to the **Report Card** panel.*

Creating a Report Card Record

1. Select **Focus | Behaviour Management | Report Card** to display the **Find On Report Students** browser.
2. Search for an existing report card (please see *Searching for an Existing Report Card* on page 422) then click the **Open** button to edit its details on the **Report Card Details** page or click the **New** button to display the **New Report Card Details** page.

1 Basic Details

Pupil: Chris Aaron

Reason for On Report: Disruptive Behaviour

Start Date: 09/07/2012

End date: 20/07/2012

Additional Comments:

Active: ☒

2 Behaviour Incidents Linked to Report Card

Date	Type	Action Taken	Points	Comments
28/06/2012	Disruptive B...	Daily Report	1	

New Delete

3 Templates

Description:

4 Targets

Code	Description

Add
 Remove
 Move Up
 Move Down

Generate Report Card

5 Report Card

3. When recording the details of a new report card, search for the required pupil/student by clicking the **Browser** button adjacent to the **Pupil** (or **Student**) field in the **Basic Details** panel to display the **Select Pupil (or Student)** dialog (please see *Searching for an Existing Pupil/Student* on page 168). If you change the associated pupil/student before saving the record, you are warned that the existing report card details will be cleared. Click the **Yes** button to continue.

The **Pupil (or Student)** field cannot be edited in a saved record.

4. Select the **Reason for On Report** from the drop-down list, e.g. **Disruptive Behaviour**.
5. Select the **Start Date** and **End date** for the report card by clicking the **Calendar** buttons then selecting the required dates.
6. Enter any **Additional Comments** relating to the report card.
7. The report card is marked as **Active** by default. To mark the report card for future use, deselect the check box.

Linking a Behaviour Incident to the Report Card

1. Click the **New** button in the **Behaviour Incidents Linked to Report Card** panel to display the **Select Behaviour Incidents for** dialog.

2. Select the **Academic Year**, **Type**, **Location**, **Action** and **Status** of the required behaviour incident from the drop-down lists then click the **Search** button to display all the behaviour incidents that match the search criteria entered.
3. Highlight the required behaviour incident then click the **OK** button to return to the **Report Card Details** page, where the selected behaviour incident is displayed in the **Behaviour Incidents Linked to Report Card** panel.

Applying a Report Card Template

A report card template enables the selection of a set of targets that a pupil/student is required to achieve over the course of the report card period, and enables you to select the columns to include on the report. Once defined, the re-usable report card template can be applied to a report card record so that the record inherits the pre-defined attributes of the template. Using a template reduces the need to repeatedly create report cards with similar structures. Once a template is applied to a report card record, the individual targets applied can be added to or removed.

When a pupil/student is issued with a report card, this is indicated on the **Take Register** page (via **Focus | Attendance** (or **Lesson Monitor**) | **Take Register**) by the appearance of a @ symbol in the pupil/student's **Name** field and their row is displayed in red text. If a report card template has been applied to the report card, the template **Code** is also appended to the **Name** field.

Name	Reg	AM	PM
Aaron, Chris @ GEN	PINE	/	\
Aaron, Liz	PINE	/	\
Adasheji, Mohammed	PINE	/	\
Avatar, Ahman	PINE	/	\
Cameron, Zara	PINE	/	\



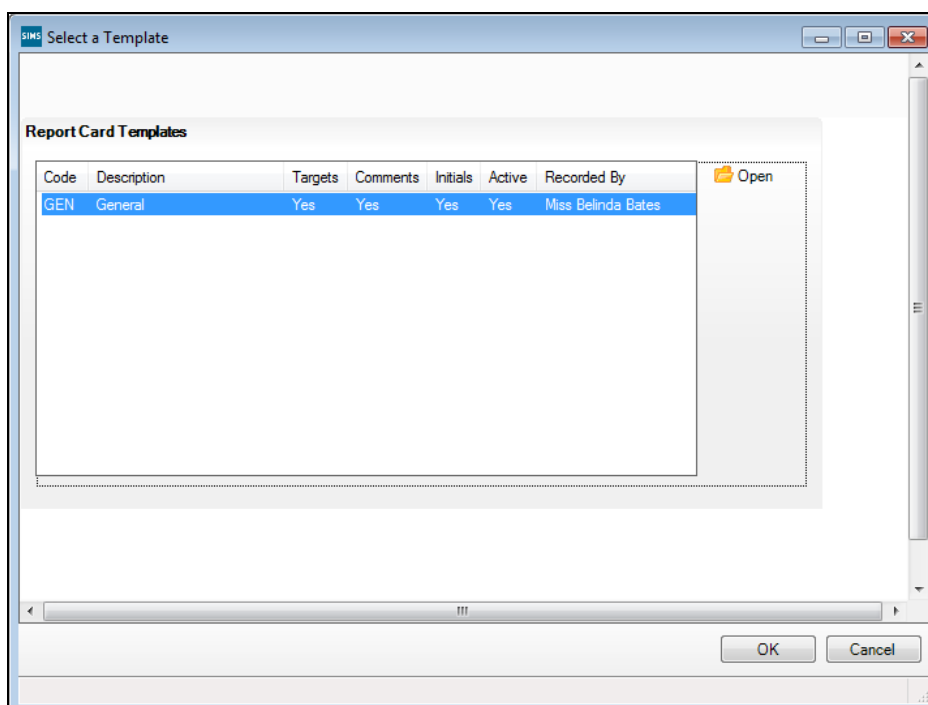
Additional Resources:

Setting Up Report Card Templates in the *Setting Up Behaviour Management* chapter of the *Setting Up and Administering SIMS* handbook

If you wish to use the standard format for report cards without using a report card template, please proceed to the next section (please see *Adding Targets to the Report Card* on page 427).

If you wish to apply a report card template:

1. Click the **Browser** button to display the **Select a Template** dialog.



2. To ensure that the correct template is selected, its details can be viewed in read-only mode by highlighting it then clicking the **Open** button to display the **Report Card Template** dialog.

NOTE: Only active report card templates are available for selection.

Report Card Template

Template Details

Code: GE

Description: General

Include Targets: ☒

Include Comments: ☒

Include Initials: ☒

Recorded By: Miss Belinda Bates

Active: ☒

Targets

Code	Description
PUNC	Punctual
HOME	Supply Homework
EQUI	Correct Equipment for Lesson

Subjects

Available Subjects:

- Activities
- Art
- Biology
- Business S
- Chaplaincy
- Chemistry
- Classics
- Core Studi
- Course R
- Design Tec
- Drama & TSt
- Dtcommunic
- DTGraphics

Chosen Subjects:

- English
- French
- Maths
- Science

Buttons: Choose all ->, Choose ->, <- Remove, <- Remove all, OK, Cancel

NOTES: Subjects are displayed on a report card only if you are licensed to use Lesson Monitor.

When a report card template is applied to a report card, the generated report card displays a line for each day on which a class associated with a selected subject is scheduled to take place.

3. Click the **Cancel** button to return to the **Select a Template** dialog.
4. Highlight the template you wish to apply to the report card then click the **OK** button to return to the **New Report Card Details** page, where the **Description** of the selected template is displayed in the **Templates** panel.

3 Templates

Description: General

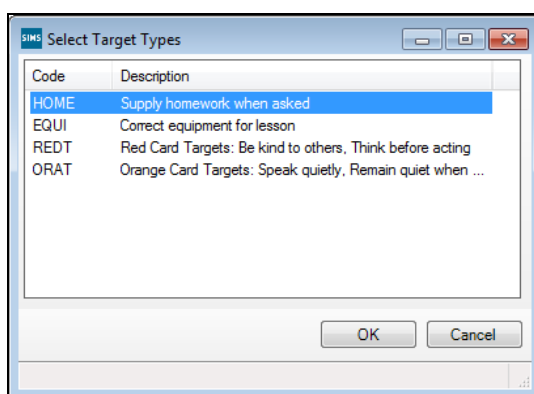
NOTE: If the **Description** is appended with - **(Inactive)**, this indicates that the selected report card template is no longer active. This is most likely to occur when viewing historical report card records.

5. If you wish to remove a template from the report card record, click the **Delete** button in the **Templates** panel.

Adding Targets to the Report Card

Targets can be applied to a report card manually or as part of a report card template. If you have applied a report card template, the individual targets applied as part of the process can be added to or removed.

1. Click the **Add** button in the **Targets** panel to display the **Select Target Types** dialog.



The targets available for selection are maintained using the **Maintain Lookups** page (accessed via **Tools | Maintain Lookups**).

2. Highlight the required target type(s) then click the **OK** button to return to the **Report Card Details** page.
3. If more than one target has been assigned to the pupil/student, the order in which they are displayed on the report card can be changed by highlighting the required target then clicking the **Move Up** and **Move Down** buttons.
4. An unwanted target can be removed by highlighting it then clicking the **Remove** button.

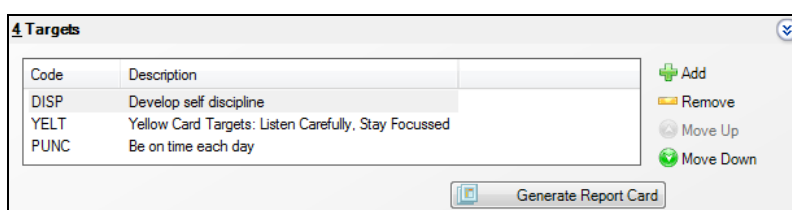


More Information:

Applying a Report Card Template on page 424

Generating and Printing the Report Card

1. Click the **Generate Report Card** button in the **Targets** panel to populate the **Report Card** panel.



16 | Creating Report Cards

The **Report Card** panel displays the following details for each day of the report card duration:

- their **Class** or **Reg Group**.
- one or more columns indicating the reason(s) for the issuing of the report card, e.g. **DISP** for Discipline, **PUNC** for Punctuality, etc.
- space for any teacher **Comments** in relation to their behaviour in the class or registration group.
- a column for the teacher's **Initials**.

Class	DISP	YELT	PUNC	Comments	Initials
Date: 09/07/2012					
PINE - AM	☒	☒	☒	Behaved well this morning	AB
PINE - PM	☒	☒	☒	No problems this afternoon	AB
Date: 10/07/2012					
Date: 11/07/2012					
Date: 12/07/2012					
Date: 13/07/2012					
Date: 16/07/2012					
Date: 17/07/2012					
Date: 18/07/2012					

2. Click the **Print** button at the top of the **Report Card Details** page to print a paper copy of the report card (please see *Selecting the Layout and Output Options for a Report* on page 430). This can be given to the pupil/student, who must produce the report card for completion by each teacher as they move from class to class throughout the school day.

Report Card for Chris Aaron					
Name	Chris Aaron		Reg	PINE	
Start Date	09/07/2012		End Date	20/07/2012	
Reason	Disruptive Behaviour				
Targets					
Code	Description				
DISP	Develop self discipline				
YELT	Yellow Card Targets: Listen Carefully, Stay Focussed				
PUNC	Be on time each day				
Report Card Progress					
Date: 20/07/2012					
Class	DISP	YELT	PUNC	Comments	Initials
PINE - AM	☒	☒	☒	Behaved well this morning.	AB
PINE - PM	☒	☒	☒	No problems this afternoon.	AB
Date: 19/07/2012					
Class	DISP	YELT	PUNC	Comments	Initials
PINE - AM	☒	☒	☒	Well behaved.	AB
PINE - PM	☒	☒	☒	Paid attention well, got involved in activities.	AB
Date: 18/07/2012					
Class	DISP	YELT	PUNC	Comments	Initials
PINE - AM	☒	☒	☒	Arrived early, well behaved.	AB
PINE - PM	☒	☒	☒	Paid attention all afternoon.	AB

*NOTE: As long as the report card is current and active, all the details can be edited or amended with the exception of the **Start Date** for a report card that has already started.*

Re-activating a Report Card

If a report card has reached its **End Date**, it becomes inactive and can no longer be edited. This applies also when its **Active** check box in the **Basic Details** panel is deselected.

It is possible to re-activate an inactive report card if, for example, you wish to extend the duration of a report card.

1. Select **Focus | Behaviour Management | Report Card** then search for and select the required report card to display the **Report Card Details** page.
2. In the **Basic Details** panel, select the **Active** check box.
3. Click the **Save** button.
4. Enter a new **End date**, add any other details then click the **Save** button.

Producing the Report Card Report

The Report Card report displays the report card details of one or more pupil/students over a specified date range, e.g. the previous term, week to date, etc.

1. Select **Reports | Behaviour Management | Report Card** to display the **Find On Report Students** browser.

Name	Year Group	Class	House	Gender	Admission Number	Reason on Report	Start Date	End Date	Active
Aaron, Chris	1	PINE		Male	001102	Disruptive Behaviour	07/09/2012	20/09/2012	No
Adedeji, Payal	6	6VC		Male	000797	Disruptive Behaviour	14/09/2012	19/09/2012	No
Agathocleous, Joe	6	6KH		Male	000805	Inadequate Work in Class	14/09/2012	28/09/2012	No
Clarke, Jenny	4	4SL		Female	000931	Homework	13/09/2012	17/09/2012	No
Dawson-Smith, Jessica	2	2GH		Female	001048	Truancy	27/09/2012	28/09/2012	No

2. Enter all or part of the pupil/student's **Surname** and/or **Forename**, if required.
3. Select values from the drop-down lists to further restrict the search criteria.

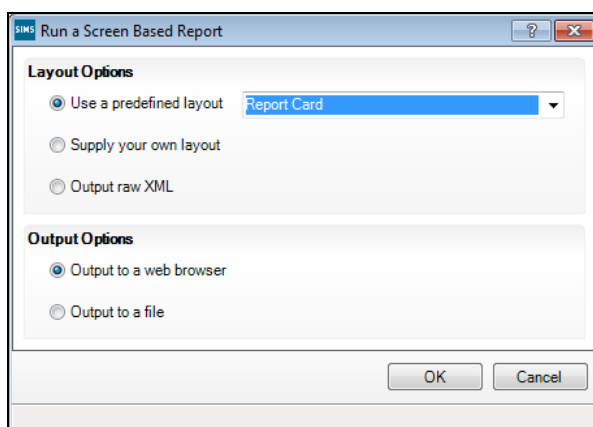
By default, only pupil/students who are on report on the current date are listed. This can be changed using either of the following methods:

- To specify a custom date range, select the **Date Range** radio button then select **From** and **To** dates by clicking the respective **Calendar** buttons then selecting the required dates. The dates default **From** today **To** the last day of the current academic year.

- To choose a pre-defined date range based on the current academic year calendar, select the **Cycle** radio button then select an option from the adjacent drop-down list, e.g. **Year to Date (02-09-2012 to 28-09-2012)**. The dates default from the first day of the current academic year to today's date.
- 4. Click the **Search** button to display all the pupil/students who match the specified search criteria.
- 5. Click the **Print** button to display the **Run a Screen Based Report** dialog.

Selecting the Layout and Output Options for a Report

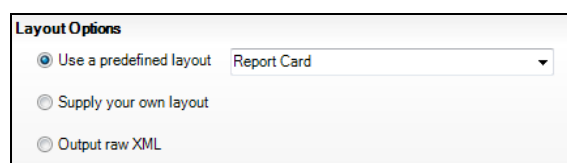
When running a report, you can define its look and feel and how it is output. Once the appropriate options have been selected, click the **OK** button to produce the report in the selected format (HTM, HTML, XML or your web browser).



Selecting Layout Options

To select the layout of the report, select the appropriate radio button then complete any additional fields.

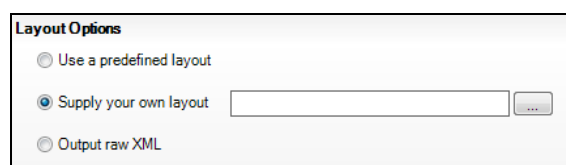
- To produce the report in its standard format, select the **Use a predefined layout** radio button. The default layout name matches that of the report.



- If you wish to produce the report using your own report design, select the **Supply your own layout** radio button.
You will be invited to select an existing style sheet template by clicking the **Browse** button to display the **Select a layout file** dialog. Navigate to the location of the appropriate .XSL or .XSLT file, highlight it then click the **Open** button to return to the **Run a Screen Based Report** dialog.



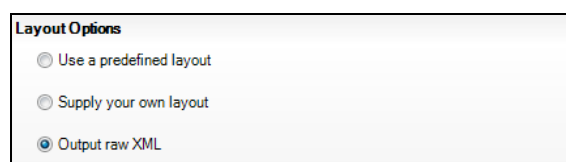
Browse button



Layout Options

☐ Use a predefined layout
☒ Supply your own layout
☐ Output raw XML

- If you want to output the content of the report as raw XML, select the **Output raw XML** radio button.

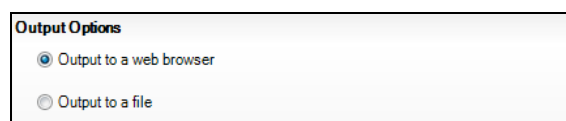


Layout Options

☐ Use a predefined layout
☐ Supply your own layout
☒ Output raw XML

Selecting Output Options

- To display the report in your default web browser, select the **Output to a web browser** radio button and click the **OK** button.



Output Options

☒ Output to a web browser
☐ Output to a file

- To save the report output to disk, select the **Output to a file** radio button then click the **Browse** button to display the **Save As** dialog.



Output Options

☐ Output to a web browser
☒ Output to a file

Navigate to the folder where you want to save the report, enter a filename, select the type of output file (.HTM, .HTML or .XML) then click the **Save** button to return to the **Run a Screen Based Report** dialog.

Click the **OK** button to save the file.

17 | Recording Exclusions

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Overview of Exclusions

Excluding a pupil/student from school is usually considered only when all other reasonable alternative actions have been explored, without success. The decision to exclude a particular pupil/student can be made if they have committed a serious breach of the school's behaviour policy and if, by remaining in school, they would seriously impair the education or welfare of others.

There are some exceptional circumstances where pupil/students can be excluded for a first or one-off offence, including:

- serious actual or threatened violence against another pupil/student or member of staff
- sexual abuse or assault
- supplying illegal drugs
- carrying an offensive weapon.

A school is within its right to report the situation to the police if a criminal offence has taken place. It may also be considered appropriate to notify Social Workers or Educational Psychologists. The decision to exclude a pupil/student can be made only by the Head Teacher or the acting Head. Exclusions cannot be open-ended; they must be for a fixed period or as a permanent measure.

Permanent exclusions and any fixed period exclusions of longer than five school days (singly or cumulatively) must be reported to the school governors and to the LA. If an exclusion will result in the pupil/student missing a public examination, this must also be reported to the school governors and to the LA. All other exclusions should be reported termly to the school governors and to the LA. Recording exclusions is particularly important for the School Census returns and therefore it is important to keep this data up-to-date.

NOTE: If a pupil/student will be excluded from school for a period of 15 or more consecutive days, the Head Teacher must organise the creation of an Individual Education Plan for the pupil/student on their return to school.

It is possible to record exclusions via the following routes:

- **Focus | Pupil (or Student) | Exclusions**
- **Focus | Behaviour Management | Maintain Behaviour Incidents** (via the **Students Involved** panel)
- Any of the **Student Behaviour** routes, accessed by clicking the **Behaviour Management** link on the **Links** panel when editing a pupil/student's details.

The page displayed and the methods of recording an exclusion are the same regardless of the menu route used. This chapter describes the process of creating an exclusion record via **Focus | Pupil (or Student) | Exclusions**.

Excluding Pupil/Students with Special Educational Needs

The Special Educational Needs Code of Practice outlines statutory guidance for identifying, assessing and making provision for pupil/students with Special Educational Needs.

Schools should avoid excluding pupil/students with statements permanently, and make every effort to avoid excluding pupil/students who are being supported at School Action or School Action Plus stage under the SEN Code of Practice, including pupil/students at the School Action Plus stage who are awaiting assessment for a statement.

Note on Permanent Exclusions

If a pupil/student has been excluded permanently, once any appeal process has been completed and you know that they will not be returning to your school, you should record them as a leaver.

To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, ensure that the following information has been recorded before recording them as a leaver:

- In Care Indicator
- SEN Provision
- Ethnicity
- Ethnic Source
- Part-time Indicator
- Date of Arrival
- Date of Leaving.

Recording an Exclusion

1. Select **Focus | Pupil (or Student) | Exclusions** to display the **Find Exclusions Student** browser.

Name	Year Group	YTI	Reg. Group	House	Gender	Admission Number
Abbess, Graham	8	8	8A	Boyle	Male	004504
Abbey, Grenetta	11	11	11F	Hooke	Female	003979
Abbey, Jimmy	13	13	G	Curie	Male	003599
Abbey, Sean	8	8	8B	Boyle	Male	004505
Abbot, Andrew	10	10	10E	Fleming	Male	004163
Abbot, Ben	11	11	11A	Newton	Male	004161
Abbot, Susan	13	13	L	Hooke	Female	003600
Able, Cameron	10	10	10A	Hooke	Male	004164

2. Search for and highlight the required pupil/student (please see *Searching for an Existing Pupil/Student* on page 168).
3. Click the **Open** button to display the **Exclusion Details** page. Any previously recorded exclusions for the selected pupil/student are displayed.

Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason

Total in Academic Year 2011/2012 0 day(s)

- Click the **New** button in the **Exclusions** panel to display the **Add Exclusion** dialog or highlight an existing exclusion record then click the **Open** button to display the **Edit Exclusions** dialog.

- Select the exclusion **Type** (e.g. **Fixed Term**) and the **Reason** for the exclusion (e.g. **Physical assault against a pupil**) from the drop-down lists.

*NOTE: Pupil/students who are considered to be disruptive at lunchtime can be excluded from school premises for the duration of the lunchtime period. This constitutes a fixed term exclusion, equivalent to one half of a school day. Select **Lunchtime** as the **Type**, **AM** as the **Start Time** and the same date in the **Start Date** and **End Date** fields.*

- Enter the exclusion **Start Date** (the date on which the pupil/student was asked to leave the school by the Head Teacher) and the **End Date** (if the exclusion is for a fixed term). Alternatively, click the appropriate **Calendar** buttons then select the required dates.



Calendar button

NOTE: If a pupil/student will be excluded from school for a period of 15 or more consecutive days, the Head teacher must organise the creation of an Individual Education Plan for the pupil/student on their return to school.

*NOTES FOR SCHOOLS IN WALES: Schools in Wales can enter exclusions in multiples of 0.25 days by selecting the **Part Time Exclusion** check box.*

*The **Start Date** and **End Dates** must reflect the exclusion length accurately. For example, a pupil/student may be excluded for 0.75 days and this may represent lunchtime exclusions over a period of three days, so the **End Date** must be recorded as three days after the **Start Date**.*

*To enter a 0.25 lunchtime exclusion, manually edit the 0.50 figure that first appears in the **Length School Days** field when the **Calculate** button is clicked (ensure that the **Part Time Exclusion** check box is selected).*

7. Select the **Start Time** of the exclusion (either **AM** or **PM**) from the drop-down list. Click the **Calculate** button to populate the **Length School Days**.

*NOTE: If the pupil/student is excluded after morning registration, the exclusion does not take effect until the afternoon. For half-day exclusions therefore, select **AM** with the same **Start Date** and **End Date**. If the pupil/student is excluded in the afternoon, select **PM** with a **Start Date** and **End Date** of the following day. The exclusion does not take effect until the following school day.*

8. Enter any relevant **Comments** relating to the incident and record details of any external **Agency Involved** if appropriate, e.g. Social Services, Police, etc.
9. The **Academic Year** and **Term** fields are populated automatically when the **Calculate** button is clicked.

Recording Disciplinary Committee Hearings

The DfE requires every school's governing body to set up a Discipline Committee that consists of three to five governors.

This committee is responsible for considering any pupil/student exclusions, and for making a ruling on the validity and period of the exclusions that have been dispensed. The committee has the power to overturn a permanent exclusion and to reinstate a previously excluded pupil/student, particularly if their exclusion is for a period of more than five days or it results in them missing an external examination.

The parent/guardians of the excluded pupil/student can make representation to the Discipline Committee about:

- a fixed period of exclusion of more than five school days.
- a pupil/student's permanent exclusion from the school.

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The Discipline Committee must hold a formal hearing about any permanent exclusion within 15 school days, even if representation has not been made by the pupil/student's parent/guardians. Once the formal hearing has been held, a member of the committee must inform both the school and the excluded pupil/student's parent/guardians of the outcome, giving reasons for the committee's decision. If a permanent exclusion has been upheld by the committee, the excluded pupil/student's parent/guardians must be informed and advised that they can make an appeal to an independent panel, if they wish so to do.

NOTE: Contact your Local Authority for guidance on when a Discipline Committee should meet, if required.

1. In the **Discipline Committee** panel, enter the date of the Discipline Committee hearing in the **Committee Date** field or click the **Calendar** button then select the required date.
2. Select the outcome of the Discipline Committee hearing from the **Committee Result** drop-down list.
3. If the excluded pupil/student's parent/guardians have made representation to the Discipline Committee, select the **Parents Representation** check box.
4. Enter a **Reinstatement Date** , if required. You can enter a date only if **Reinstate from Exclusion** is selected from the **Committee Result** drop-down list.

Exclusion Details

Type: Fixed Term Reason: Physical assault against a pupil

Start Date: 03/07/2012 End Date: 20/07/2012

Start Time: AM Length School Days: 14.00 Calculate

Part Time Exclusion: ☐

Comments: Altercation in the playground involving several boys but initiated by Chris.

Agency Involved:

Academic Year: Academic Year 2011/2012 Term: Summer Term

Discipline Committee

Committee Date: 09/07/2012

Committee Result: Exclusion Stands Reinstatement Date:

Parents Representation: ☒

Appeal Details

Appeal Received: ☐

Appeal Date: Appeal Result:

Result Date: Reinstatement Date:

Notes/Documents

Attachment	Summary	Type	Owner	Last Modified

New Open Delete

OK Cancel

Dealing with Appeals

Parent/guardians have the right to lodge an appeal against an exclusion that has been imposed on their child. An independent appeals panel can be arranged by the LA, if necessary. Generally, this action is undertaken only after the parent/guardian's representation to the Discipline Committee has been rejected and the decision has been taken to uphold the permanent exclusion.

Once an appeal has been received by the appeals panel, a meeting must be convened within 15 days. If the parent/guardians of the excluded pupil/student request more time to collate additional evidence in their child's defence, the appeals panel can grant an adjournment until such time as the information is available.

When all the evidence has been reviewed, the appeals panel may instruct the school to reinstate the pupil/student, either immediately or at a specified date in the future.

If the relationship between the excluded pupil/student's parent/guardians and the school has become untenable, the appeals panel can overturn the exclusion. The LA then become responsible for either arranging an alternative school place for the previously excluded child or making provision for their continued education.

The **Appeal Details** panel is applicable only for permanent exclusions and is enabled only if the exclusion is permanent and the Discipline Committee has already met.

Appeal Details			
Appeal Received	☐		
Appeal Date			Appeal Result
Result Date			Reinstatement Date
			

1. If an appeal is lodged, select the **Appeal Received** check box
2. Enter the **Appeal Date** or click the **Calendar** button then select the required date.
3. When known, select the **Appeal Result** from the drop-down list and enter the **Result Date**.
4. If it is decided that the pupil/student should be reinstated, enter the **Reinstatement Date** or click the **Calendar** button then select the required date.

Adding Notes/Documents to the Exclusion

If required, enter any additional notes or attach any applicable documents by clicking the **New** button adjacent to the **Notes/Documents** panel to display the **Add Note/Document** dialog.



More Information:

Attaching a New Note/Document on page 147

Saving the Exclusion

1. Click the **OK** button to return to the **Exclusion Details** page. A summary of the exclusions recorded for the selected pupil/student across the current academic year is displayed in the **Exclusions** panel.

Exclusions							New Open Delete
Academic Year	Term	Start Date	End Date	Length	Exclusion Type	Exclusion Reason	
Academic Year 2011/2012	Summer Term	03/07/2012	20/07/2012	14	Fixed Term	Physical assault against a pupil	
Total in Academic Year 2011/2012							0 day(s)

When the **Exclusion Details** page is saved, the number of school days in the current academic year for which the selected pupil/student has been excluded is displayed at the bottom of the page. This figure must not exceed 45 days.

2. Click the **Save** button to save the exclusion details.

Deleting an Exclusion

1. Select **Focus | Pupil** (or **Student**) | **Exclusions** to display the **Find Student** browser.
2. Search for and highlight the required pupil/student then click the **Open** button to display the **Exclusion Details** page.
3. In the **Exclusions** panel, highlight the exclusion you wish to delete then click the **Delete** button.

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