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# Producing the School Census Autumn 2018 Return (Special Schools) handbook, applicable to 7.182 onwards

English Special Schools

Applicable to 7.182 onwards

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# 01 | Introduction

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## Overview

This handbook provides the information needed by Special schools in England to complete the School Census Autumn 2018 Return, which this year takes place on Thursday 4 October.

The School Census Autumn Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

Currently, there are three School Census returns each year (i.e. Spring, Summer and Autumn), which collect detailed information about school characteristics and pupil/students. Different data is collected depending on which return is being prepared, and your school phase.

A list of items collected from Special schools in England for the School Census Autumn 2018 is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page *6*).

*NOTE: The contents of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS to produce the School Census Return.*

**Additional Resources:**

*Preparing for the School Census Autumn 2018 Return* handbook

# How has the School Census Autumn Return Changed since Last Year?

Changes to the School Census Autumn Return include the following:

- Census Date: 04/10/2018
- Termly attendance collected from 02/04/2018 to 31/07/2018
- Exclusions collected from 01/01/2018 to 01/04/2018
- Free School Meals collected from 18/05/2018 to 04/10/2018

## Changes to Data Items Collected

The Service Children in Education indicator is now collected for all three School Census returns and is applicable to all pupil/students and school phases.

The DfE no longer require the following data items to be collected for any School Census return:

- Pupil/student Nationality
- Pupil/student Country of Birth.

## Alternative Provision Placement

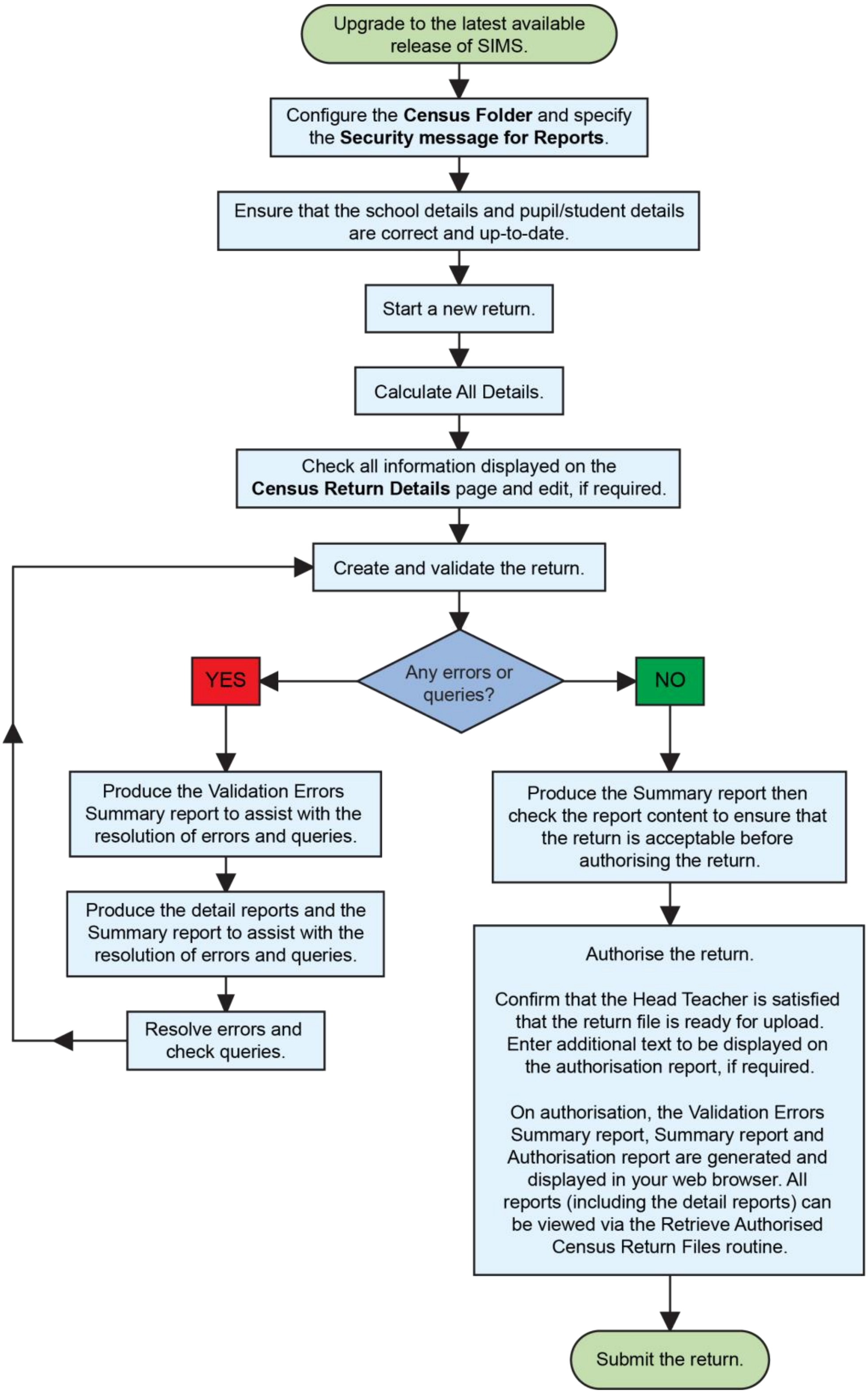
The collection date range for pupil placements in Alternative Provisions (**AP Placements**) is now displayed in the **Census Details** panel.

A new detail report (**AP Placements**) is available from the **Detail Report** drop-down list.

There is no requirement from the DfE for this data to be collected or held. Should schools decide to collect, process or retain data on Alternative Provision Placements for their own purposes, a lawful basis for this processing must be identified by the school, as outlined in GDPR articles 6 and 9. More information on lawful bases for processing can be found on the ICO website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/#ib3).

# Steps to Producing the School Census Return

The process of producing the School Census can be separated into a number of steps, some of which might need to be repeated in order to eliminate validation errors and queries.


Upgrade to the latest available release of SIMS.
Configure the **Census Folder** and specify the **Security message for Reports**.
Ensure that the school details and pupil/student details are correct and up-to-date.
Start a new return.
Calculate All Details.
Check all information displayed on the **Census Return Details** page and edit, if required.
Create and validate the return.
Any errors or queries?
YES
NO
Produce the Validation Errors Summary report to assist with the resolution of errors and queries.
Produce the detail reports and the Summary report to assist with the resolution of errors and queries.
Resolve errors and check queries.
Produce the Summary report then check the report content to ensure that the return is acceptable before authorising the return.
Authorise the return.
Confirm that the Head Teacher is satisfied that the return file is ready for upload. Enter additional text to be displayed on the authorisation report, if required.
On authorisation, the Validation Errors Summary report, Summary report and Authorisation report are generated and displayed in your web browser. All reports (including the detail reports) can be viewed via the Retrieve Authorised Census Return Files routine.
Submit the return.

# Where to Find More Information

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

A wide range of documentation is available from the SIMS **Documentation Centre**, including handbooks, quick reference sheets and tutorials. Click the **Documentation** button (located on the top right-hand side of the SIMS **Home Page**), select the required category and then select the document you require. Alternatively, use the **Search** facility to locate the required document.

Documentation is also available from the My Account website (https://myaccount.capita-cs.co.uk).

1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

   Alternatively, click **SIMS Publications** (located in the **Popular Searches** list) to display a list of all SIMS publications.

   The search results are displayed automatically.

## Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

*NOTE: You no longer need to use + / - / "" when searching.*

- Cut down on the amount of words that you type in the search field and only use key words, e.g. instead of typing `student showing as a contact` search for the word `contact`.
- Use the **Product Type** filter to refine results further.
- Use the advanced filters located on the left-hand side of the **Search results** page.

## Additional Information

In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, together with an Errors and Resolutions document that provides suggestions on how to resolve any validation errors or queries, are also available.

To access the School Census documents, please search for `CENSUS18` in the SIMS **Documentation Centre** or My Account.

# 02| Preparing for the School Census Autumn Return

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## Setting Permissions

The following permissions are applicable to users who deal with returns.

### Producing the Return

To produce the return, you must be a member of the Returns Manager user group in System Manager.

### Editing and Preparing Data

Users who edit and prepare data must have permissions to access additional areas of SIMS, e.g. pupil/student details, school details, etc. These users must be a member of any of the following user groups in System Manager:

- Administration Assistant
- Admissions Officer
- School Administrator.

### Importing Revised Files

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS), to be imported into SIMS between SIMS releases.

To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of any of the following user groups in System Manager:

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available via the **Documentation** button on the SIMS **Home Page** or the My Account website (https://myaccount.capita-cs.co.uk).

### Where to find More Information about Permissions

Please contact your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *Managing SIMS Users, Groups and Databases* handbook.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (https://myaccount.capita-cs.co.uk).

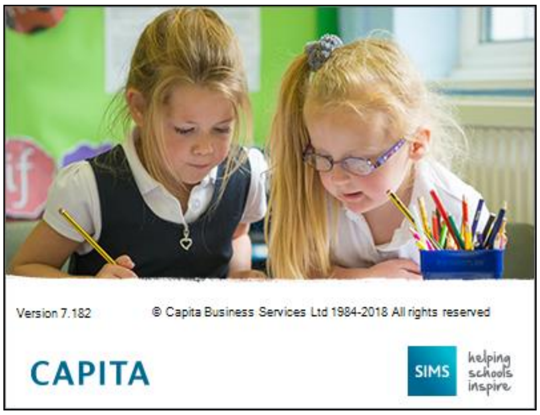
To find the spreadsheet, search for `<sims version> sims permissions`, e.g. `7.182 sims permissions`.

## What Version of SIMS is Required?

To run the return, you must have the SIMS 2018 Summer Release (7.182) or later installed.

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed.

The version should read 7.182 or later.


Version 7.182
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SIMS
helping schools inspire

## Preparing Data for the School Census Return

Before beginning the process of producing the return, it is advisable to spend time ensuring that all school level and pupil/student level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupil/students have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

The following information is collected from Special schools for the School Census Autumn 2018 Return.

### School Level Data

Characteristics: LA number, DfE establishment number, school name, school phase, school type, highest national curriculum year, lowest national curriculum year, intake type, governance, school email address and school telephone number.

### Pupil/Student Level Data

- Pupil/Student Identifiers: unique pupil number (UPN) and former UPN, unique learner number (ULN), surname, forename, middle names, former surname, preferred surname, date of birth and gender.
- Characteristics:
  - first language
  - post looked after arrangements
  - school dinner taken (applicable to schools with pupils in Reception, Year 1 and Year 2. Also, pupils in Year Taught In X (those not following the National Curriculum) who are aged four to six and who were born between 01/09/2011 and 31/08/2014 inclusive)

  - free school meal eligibility (18/05/2018 to 04/10/2018): start date, end date and UK country in which the eligibility applies
  - top-up funding indicator, funded free entitlement hours, extended entitlement childcare hours, 30 hour code, disability access fund indicator and hours at setting
  - service children in education indicator
  - Youth Support Services Agreement (YSSA) indicator, full-time employment indicator.
- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator and actual national curriculum year group.
- Special Educational Needs: SEN provision.
- Home Information: Pupil/student's home address, unique property reference number (UPRN).
- Exclusion Information (01/01/2018 to 01/04/2018): category, reason, SEN provision, start date and actual number of sessions.
- Attendance Information (02/04/2018 to 31/07/2018): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Autumn 2018* guide.

The preparation guide, together with other useful School Census documentation, is available from the SIMS **Documentation Centre** (accessed via the **Documentation** button, which is located on the top right-hand side of the SIMS **Home Page**) and on the My Account website (https://myaccount.capita-cs.co.uk).

To access the School Census documents, please search for `CENSUS18` in the SIMS **Documentation Centre** or My Account.

# 03| Producing the School Census Autumn Return

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## Creating a New School Census Return

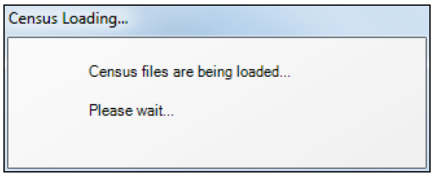
Before creating a new return, ensure that all pupil/student and school information is present and accurate in SIMS.

It is possible to create more than one return, enabling you to carry out dry runs so that you can check what data needs to be added or updated. Any unwanted returns can be deleted, provided they have not been authorised.

Data is collected for the following pupil/students:

- All pupil/students on-roll on 04/10/2018 (census day).
- Any additional pupil/students not on-roll on census day who:
  - were on-roll for at least one session during the collection period from 02/04/2018 and 31/07/2018.
  - had an exclusion that started between 01/01/2018 and 01/04/2018.

1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



Census Loading...

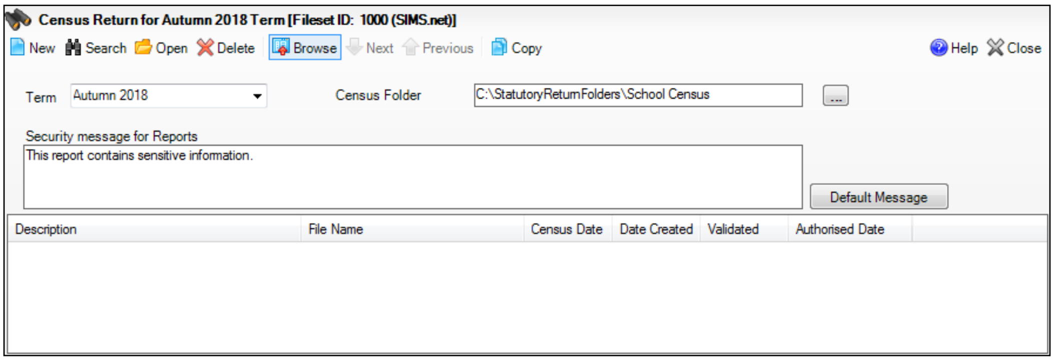
Census files are being loaded...

Please wait...

> *NOTE: The first time that the **Routines | Statutory Returns | School Census** menu route is selected during each SIMS session, there is a delay while the School Census files are loaded.*

When the files are loaded, the **Census Return** browser is displayed.

> *NOTE: The Fileset ID is displayed in the browser header (for information only).*



Census Return for Autumn 2018 Term [Fileset ID: 1000 (SIMS.net)]

Term: Autumn 2018

Census Folder: C:\StatutoryReturnFolders\School Census

Security message for Reports: This report contains sensitive information.

By default, the **Term** field displays the appropriate term for the selected return, in this instance **Autumn 2018**.

2. Ensure that the **Census Folder** is selected correctly and that the required **Security message for Reports** is specified, as described in the following sections.

**More Information:**
*Deleting an Unauthorised Return* on page *52*
*Specifying the Security Message for Reports* on page *11*

## Configuring the Census Folder

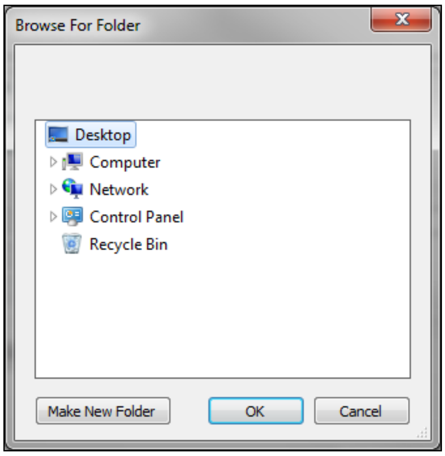
Before creating a return, the folder in which the return file will be saved must be specified.

> ***IMPORTANT NOTES:*** *Due to the sensitive nature of some of the data stored in SIMS, careful consideration must 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. Please refer to the government website for more information about securing your information (https://www.gov.uk/service-manual/technology/securing-your-information). If you are in any doubt, you should consult with your IT Security Officer before proceeding.*
>
> *The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements of the GDPR.*
>
> *Further information on the GDPR can be found on the Guide to the General Data protection Regulations (GDPR) page of the Information Commissioners Office (ICO) website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr).*

1. Specify the folder where the return files are to be stored by entering the folder location in the **Census Folder** field.

Alternatively, click the **Browse** button to display the **Browse For Folder** dialog.

... *Browse button*



Navigate to the location of the required folder and highlight it. If a suitable folder does not exist, click the **Make New Folder** button and enter a suitable name for the new folder.

2. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.

> ***IMPORTANT NOTE:*** *If you are changing the location of the folder, ensure that only authorised personnel have access to the new folder, as it will contain sensitive data. For more information, please see the important note at the beginning of this section.*

3. Ensure that the **Security Message for Reports** is appropriate for your school.

## Specifying the Security Message for Reports

At the bottom of the browser is a **Security Message for Reports** field, which contains text that will be displayed at the top of each report.

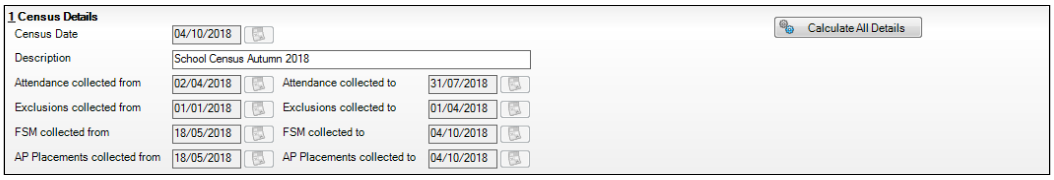
1. The security message text defaults to **This report contains sensitive information**, but can be edited, if required.
2. If any edits are made, you can click the **Default Message** button to revert to the default text.
3. Click the **New** button to display the **Census Retrun Details** page.

## Editing Census Details

The **Census Details** panel displays the following read-only information:

- Census Date 04/10/2018.
- Attendance data collected from 02/04/2018 to 31/07/2018.
- Exclusions data collected from 01/01/2018 to 01/04/2018.
- FSM (Free School Meal) data collected from 18/05/2018 to 04/10/2018.

- AP (Alternative Provision) Placements: There is no requirement from the DfE for this data to be collected or held. Should schools decide to collect, process or retain data on Alternative Provision Placements for their own purposes, a lawful basis for this processing must be identified by the school, as outlined in GDPR articles 6 and 9. More information on lawful bases for processing can be found on the ICO website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/#ib3).



**1 Census Details**

Census Date: 04/10/2018
Description: School Census Autumn 2018
Attendance collected from: 02/04/2018 Attendance collected to: 31/07/2018
Exclusions collected from: 01/01/2018 Exclusions collected to: 01/04/2018
FSM collected from: 18/05/2018 FSM collected to: 04/10/2018
AP Placements collected from: 18/05/2018 AP Placements collected to: 04/10/2018

The default **Description** (**School Census Autumn 2018**) can be edited, if required, e.g. to identify a dry run.

***WARNING:*** *Each description used must be unique. An error message is displayed if SIMS identifies a duplicate description.*

*A unique description also helps to identify the required return when viewed in the **Census Return** browser and can be particularly useful when creating dry runs, or copies of existing returns.*

## Calculating All Details

Clicking the **Calculate All Details** button extracts the required information from SIMS and displays the results in the applicable panels of the **Census Return Details** page.

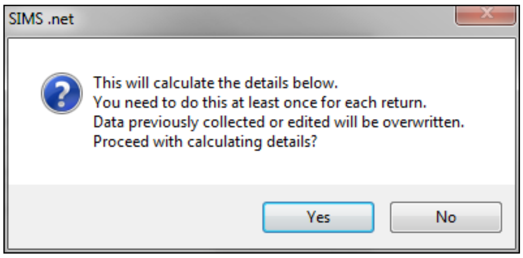
***IMPORTANT NOTE:*** *You must calculate all details at least once to populate the various panels for each return.*

*Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in SIMS.*

Any details that are calculated automatically should be checked and edited, if required.

1. Click the **Calculate All Details** button.

   A message advises that any existing data currently shown on the **Census Return Details** page will be overwritten.



This will calculate the details below.
You need to do this at least once for each return.
Data previously collected or edited will be overwritten.
Proceed with calculating details?

2. Click the **Yes** button to calculate all details. At this point, depending on the number of pupil/students in the school, there may be a short delay while details are calculated.

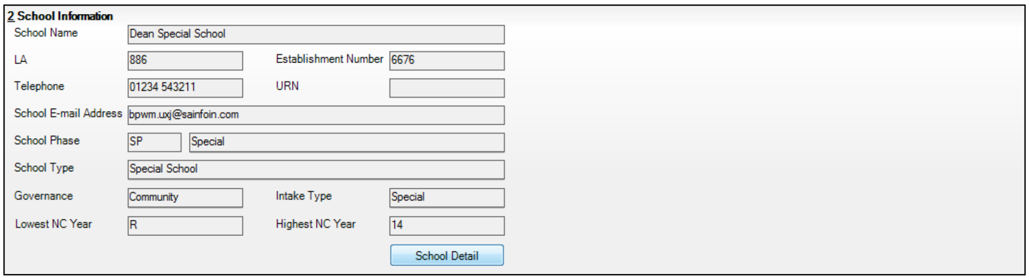
   The applicable panels on the **Census Return Details** page are populated with data.

3. The return can be saved at any point by clicking the **Save** button.

## Editing School Information

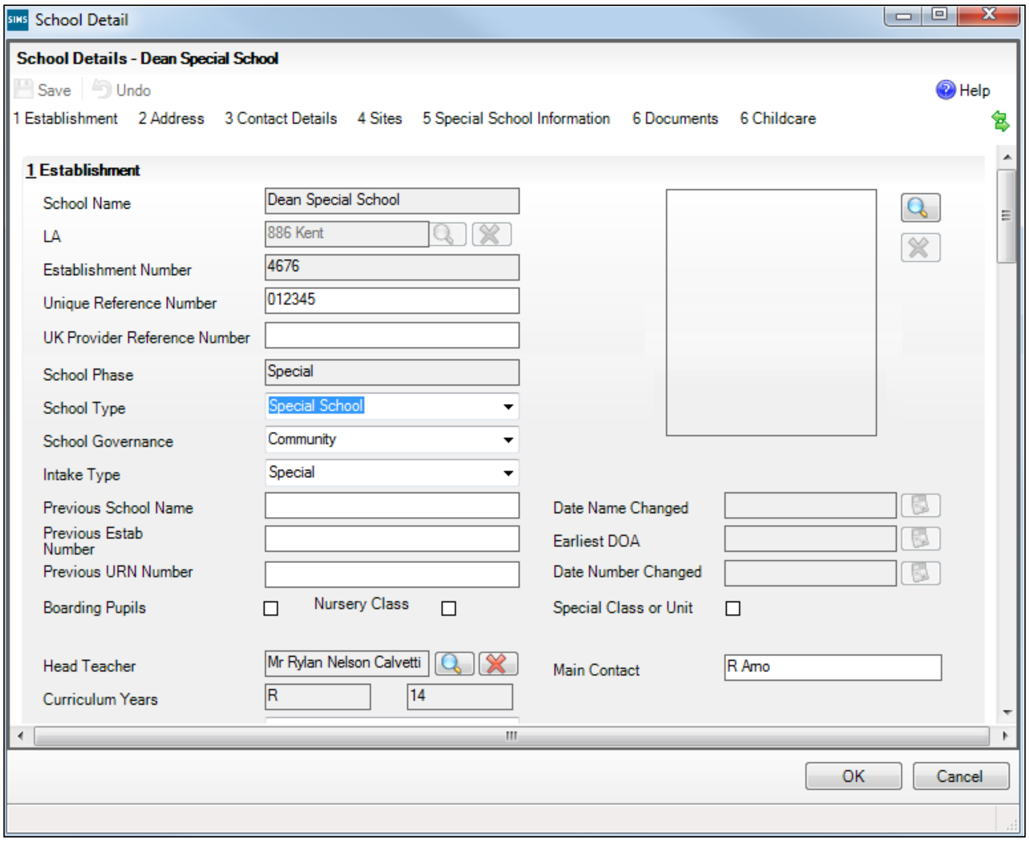
The **School Information** panel displays details that have previously been recorded on the **School Details** page in SIMS (**Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**). The information displayed may vary depending on your school and the details entered, e.g. Academy specific information.

The details displayed are read-only but can be amended, if necessary, via the **School Detail** button.



2 School Information
School Name: Dean Special School
LA: 886
Establishment Number: 6676
Telephone: 01234 543211
URN:
School E-mail Address: bpwm.uxj@sainfoin.com
School Phase: SP Special
School Type: Special School
Governance: Community
Intake Type: Special
Lowest NC Year: R
Highest NC Year: 14

1. If any details are missing or incorrect, click the **School Detail** button to display the **School Detail** dialog, where information applicable to your school is displayed.



**School Details - Dean Special School**

**1 Establishment**

| | | | |
|---|---|---|---|
| School Name | Dean Special School | | |
| LA | 886 Kent | | |
| Establishment Number | 4676 | | |
| Unique Reference Number | 012345 | | |
| UK Provider Reference Number | | | |
| School Phase | Special | | |
| School Type | Special School | | |
| School Governance | Community | | |
| Intake Type | Special | | |
| Previous School Name | | Date Name Changed | |
| Previous Estab Number | | Earliest DOA | |
| Previous URN Number | | Date Number Changed | |
| Boarding Pupils | ☐ Nursery Class ☐ | Special Class or Unit | ☐ |
| Head Teacher | Mr Rylan Nelson Calvetti | Main Contact | R Amo |
| Curriculum Years | R 14 | | |

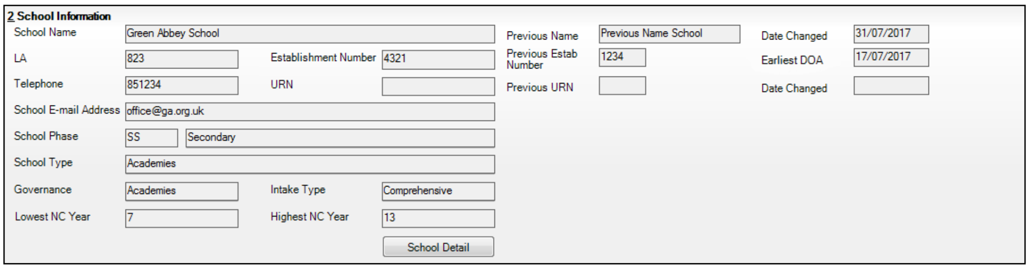
2. Add or amend the school details, selecting from the drop-down lists where applicable.

> *NOTE: The **School Name**, **LA** number, **Establishment Number**, **School Phase** and **Curriculum Years** were set up when SIMS was installed. If these details are incorrect, please contact your Local Support Unit for assistance.*

3. Ensure that the establishment's six digit **Unique Reference Number** (URN) is entered. The number is available via the Get information about schools website (https://get-information-schools.service.gov.uk/), which is a register of schools and colleges in England.

4. Click the **Save** button then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

## Information for Academies



**2 School Information**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| School Name | Green Abbey School | | | Previous Name | Previous Name School | Date Changed | 31/07/2017 |
| LA | 823 | Establishment Number | 4321 | Previous Estab Number | 1234 | Earliest DOA | 17/07/2017 |
| Telephone | 851234 | URN | | Previous URN | | Date Changed | |
| School E-mail Address | office@ga.org.uk | | | | | | |
| School Phase | SS | Secondary | | | | | |
| School Type | Academies | | | | | | |
| Governance | Academies | Intake Type | Comprehensive | | | | |
| Lowest NC Year | 7 | Highest NC Year | 13 | | | | |

Academies should also ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.

  Select **Academies** from the applicable drop-down lists.
- The **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).

  This information is used by School Census. If the establishment number (DfE number) has changed for sponsor-led Academies, historical information is not collected and the earliest date of admission is reported in the School Census.
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

  This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.

# Editing Early Years

Early Years data is collected from all schools that have early years pupils on-roll on census day. The following items are collected:

- Hours at Setting
- Funded Hours
- Disability Access Fund
- 30 Hour Code
- Extended Funded Hours.

*NOTE: Disability Access Fund, 30 Hour Code and Extended Funded Hours are not collected in the census for pupils aged two at 31/08/2018.*

## Funded Hours and Hours at Setting

Funded hours are the total number of free child care hours that a child receives. All three and four year old pupils are eligible for 15 hours funded child care a week. Advice about the eligibility of two year old children for funded child care can be found on the DfE website (https://www.gov.uk/help-with-childcare-costs/free-childcare-2-year-olds).

Hours at Setting include funded hours (as described previously) plus any additional hours funded by other means.

The hours collected in this return are for the week in which the census day falls.

| Date of Birth Ranges | Phase and Year Group | Free Entitlement |
|---|---|---|
| 01/09/2014 to 31/08/2016 inclusive | All relevant schools and year groups | 15 hours |
| 01/09/2013 to 31/08/2014 inclusive | All relevant schools - National Curriculum Year groups E1, E2, N1 and N2 only. | 15 hours |

## Disability Access Fund

The Disability Access Fund (DAF) is payable as a lump sum once a year and awarded to three and four year old pupils who meet the following criteria:

- They are in receipt of child Disability Living Allowance (DLA)

  and
- They access their entitlement to free early learning and childcare, e.g. funded hours.

Disability Access Fund data is collected in this return for pupils who are in receipt of the fund on census day.

| Date of Birth Ranges | Phase and Year Group |
|---|---|
| 01/09/2014 to 31/08/2015 inclusive | All relevant schools and year groups |
| 01/09/2013 to 31/08/2014 inclusive | All relevant schools - National Curriculum Year groups E1, E2, N1 and N2 only. |

## Extended Funded Hours and 30 Hour Code

**Extended Funded Hours** are the number of hours that are in addition to the initial 15 funded hours that a child receives and is applicable to three and four year old pupils only.

Extended Funded hours can double the original 15 hours of free child care to 30 hours a week, provided that the following criteria are met:

- Both parents must be working (or the sole parent is working in a lone parent family) and live in England.
- Each parent earns, on average, a weekly minimum equivalent to 16 hours at National Minimum Wage or National Living Wage.
- Each parent must have an annual income of less than the specified amount.

Parents who meet the extended funded hours criteria must obtain a unique code from the Tax Office (HM Revenue & Customs), then provide it to the school, together with other details, to confirm their eligibility for extended child care hours.

The 11 digit **30 Hour Code** and the number of extended funded hours are collected in this return for the week in which the census day falls.

| Date of Birth Ranges | Phase and Year Group | Free Entitlement |
|---|---|---|
| 01/09/2014 to 31/08/2016 inclusive | All relevant schools and year groups | 15 hours |
| 01/09/2013 to 31/08/2014 inclusive | All relevant schools - National Curriculum Year groups E1, E2, N1 and N2 only. | 15 hours |

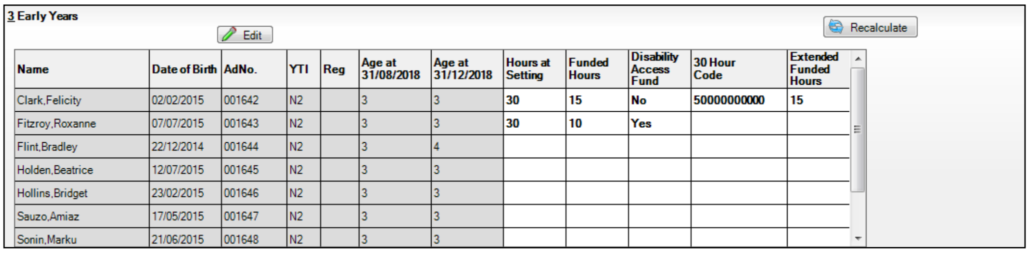
Extended Funded Hours information provided by the DfE can be found on their website (https://www.gov.uk/government/publications/30-hours-free-childcare-la-and-early-years-provider-guide).

## Recording Early Years

The required data can be recorded:

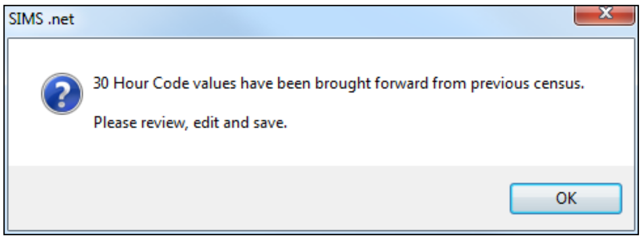
- via the **Edit** button in the **Early Years** panel
- via **Tools | Statutory Returns Tools | Update Early Years - Update Early Years** page. The data in the **Early Years** panel must be refreshed by clicking the **Recalculate** button after using the Update Early Years routine.

If data has been recorded previously, the values are displayed in the read-only **Early Years** panel. Only cohorts applicable to your school are displayed.



| Name | Date of Birth | AdNo. | YTI | Reg | Age at 31/08/2018 | Age at 31/12/2018 | Hours at Setting | Funded Hours | Disability Access Fund | 30 Hour Code | Extended Funded Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Clark,Felicity | 02/02/2015 | 001642 | N2 | | 3 | 3 | 30 | 15 | No | 50000000000 | 15 |
| Fitzroy,Roxanne | 07/07/2015 | 001643 | N2 | | 3 | 3 | 30 | 10 | Yes | | |
| Flint,Bradley | 22/12/2014 | 001644 | N2 | | 3 | 4 | | | | | |
| Holden,Beatrice | 12/07/2015 | 001645 | N2 | | 3 | 3 | | | | | |
| Hollins,Bridget | 23/02/2015 | 001646 | N2 | | 3 | 3 | | | | | |
| Sauzo,Amiaz | 17/05/2015 | 001647 | N2 | | 3 | 3 | | | | | |
| Sonin,Marku | 21/06/2015 | 001648 | N2 | | 3 | 3 | | | | | |

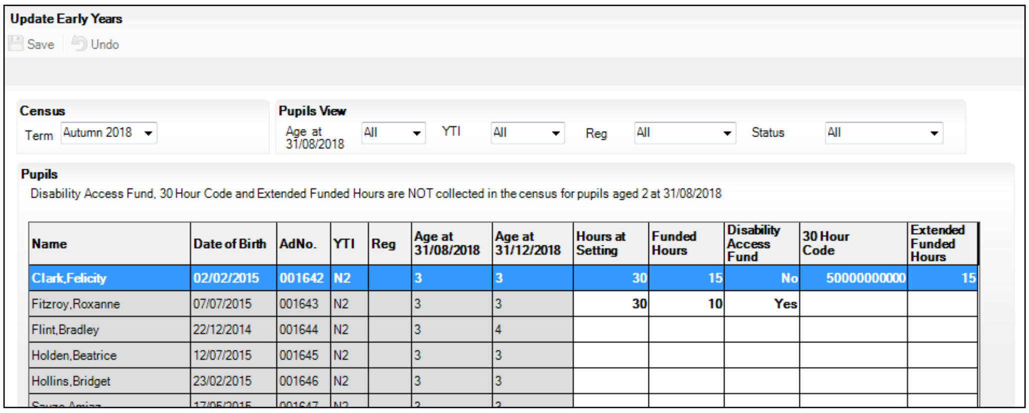
1. In the **Early Years** panel, click the **Edit** button to display a message informing you that data has been brought forward from the previous census.



30 Hour Code values have been brought forward from previous census.

Please review, edit and save.

2. Click the **OK** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.



**Census**
Term: Autumn 2018

**Pupils View**
Age at 31/08/2018: All
YTI: All
Reg: All
Status: All

**Pupils**
Disability Access Fund, 30 Hour Code and Extended Funded Hours are NOT collected in the census for pupils aged 2 at 31/08/2018

| Name | Date of Birth | AdNo. | YTI | Reg | Age at 31/08/2018 | Age at 31/12/2018 | Hours at Setting | Funded Hours | Disability Access Fund | 30 Hour Code | Extended Funded Hours |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Clark,Felicity | 02/02/2015 | 001642 | N2 | | 3 | 3 | 30 | 15 | No | 50000000000 | 15 |
| Fitzroy,Roxanne | 07/07/2015 | 001643 | N2 | | 3 | 3 | 30 | 10 | Yes | | |
| Flint,Bradley | 22/12/2014 | 001644 | N2 | | 3 | 4 | | | | | |
| Holden,Beatrice | 12/07/2015 | 001645 | N2 | | 3 | 3 | | | | | |
| Hollins,Bridget | 23/02/2015 | 001646 | N2 | | 3 | 3 | | | | | |

3. To add or edit the number of **Hours at Setting**, **Funded Hours** and **Extended Funded Hours** (i.e. the number of hours in addition to the initial funded hours) for an individual pupil, select the required criteria in the **Pupils View** panel.

   In the **Pupils** panel, highlight the required pupil, click the applicable cell and then enter the required number of hours.

   ***IMPORTANT NOTES:*** *Values for* ***Funded Hours***, ***Hours at Setting*** *and* ***Extended Funded Hours*** *should be entered using two decimal places. For example, 1 hour 15 minutes must be entered as 1.25. Zero (0) is an accepted value.*

   *If the value entered is within the range accepted by SIMS but is higher than what the DfE expects, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be recorded on the COLLECT Portal.*

4. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:
   a. In the **Pupils View** panel, select the required year group from the Year Taught In (**YTI**) drop-down list. The selected pupils only are displayed in the **Pupils** panel.
   b. Right-click in the **Pupils** panel, then select **Select All** from the drop-down list.
   c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting**, **Funded Hours** or **Extended Funded Hours**, then enter the number of hours that is applicable to the majority of pupils.

      This number is then entered automatically for all the selected pupils.
   d. Click to the right of the grid to deselect all.
   e. Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking the associated **Hours at Setting**, **Funded Hours** or **Extended Funded Hours** cell (as applicable) then entering the required number.

5. Indicate whether the pupils are in receipt of the **Disability Access Fund**. Click the applicable cell then select **Yes** or **No** from the drop-down list.
6. Enter the 11 digit **30 Hour Code**, e.g. 50000000000, in the applicable cell, if in receipt of extended funded hours.

   ***IMPORTANT NOTE:*** *Each pupil must have a different 30 hour code. Ensure that all 11 digits are entered.*

7. Click the **Save** button.

   If there are any pupils for whom zero hours have been recorded, a message is displayed. Click the **Yes** button to save the data or the **No** button to return to the **Update Hours** page, where the number of hours can be entered.

8. Click the **OK** button to return to the **Census Return Details** page, where the updated hours are displayed.

   ***IMPORTANT NOTES:***
   *If, while completing the return, any of the following processes are performed, click the* ***Recalculate*** *button (located at the top right-hand side of the* ***Early Years*** *panel) to ensure that the up-to-date data is displayed:*
   - *any information is update via* ***Tools | Statutory Return Tools | Update Early Years***
   - *a new pupil is added in SIMS*
   - *a pupil's date of birth is amended.*

   *Please note that when information is updated via the* ***Edit*** *button, the* ***Early Years*** *panel is refreshed automatically.*

**More Information:**
*Early Years Report* on page *41*

## Using the Status to determine if Hours at Setting or Funded Hours are recorded

1. On the **Census Return Details** page, click the **Edit** button (located in the **Early Years** panel) to display the **Update Early Years** page.
2. In the **Pupils View** panel, ensure that the required **Age at** date, **YTI** and **Reg** group are selected and then select **No Hours at Setting** (or **No Funded Hours**) from the **Status** drop-down list.

   Only pupil/students who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.

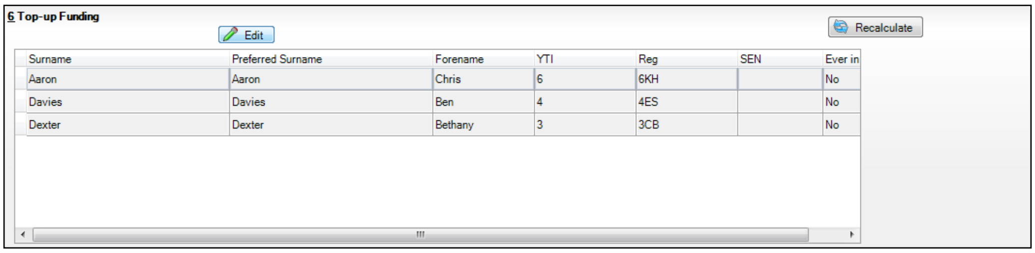
3. Enter the required values for these pupil/students as described previously.
4. Click the **Save** button.

# Editing Pupil/Students with Top-Up Funding

Top-up funding is supplied to schools, in most cases by the Local Authority, to meet the additional costs of support for high needs pupil/students.

The **Top-up Funding** panel enables you to record the on-roll pupil/students for whom your school is receiving top-up funding on census day.

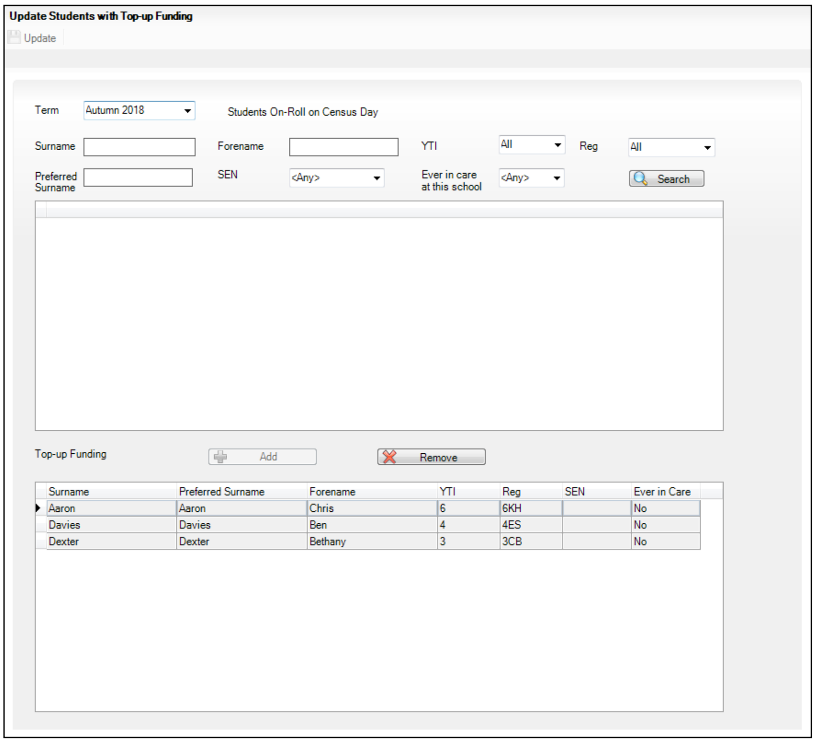
If the pupil/students with top-up funding have been recorded previously via **Tools | Statutory Return Tools | Update Top-Up Funding**, the data is displayed in the **Top-up Funding** panel.



| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in |
|---|---|---|---|---|---|---|
| Aaron | Aaron | Chris | 6 | 6KH |  | No |
| Davies | Davies | Ben | 4 | 4ES |  | No |
| Dexter | Dexter | Bethany | 3 | 3CB |  | No |

The information displayed in the **Top-up Funding** panel is read-only. Updating top-up funding information, e.g. adding or removing a pupil/student, must be done via the **Edit** button.

1. Click the **Edit** button to display the **Update Pupil** (or **Student**)**s with Top-up Funding** dialog. The pupil/students currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).


Update Students with Top-up Funding
Update
Students On-Roll on Census Day
Search
Add
Remove

Term: Autumn 2018

Surname:

Forename:

YTI: All

Reg: All

Preferred Surname:

SEN: <Any>

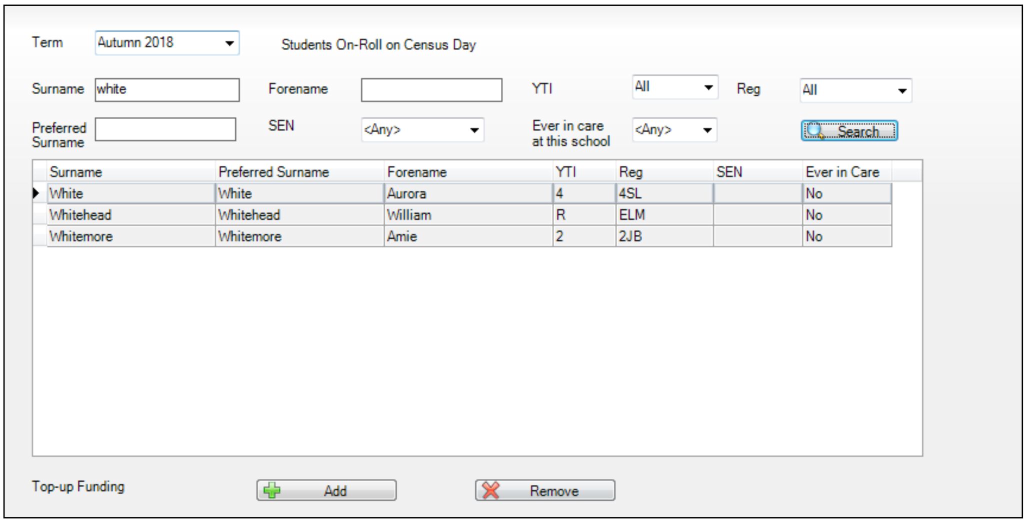
Ever in care at this school: <Any>

Top-up Funding

| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in Care |
|---|---|---|---|---|---|---|
| Aaron | Aaron | Chris | 6 | 6KH |  | No |
| Davies | Davies | Ben | 4 | 4ES |  | No |
| Dexter | Dexter | Bethany | 3 | 3CB |  | No |

2. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupil/students you wish to record as having top-up funding.

> *TIP: Click the **Search** button to display a list of all pupil/students who have not been defined as having top-up funding. Alternatively, enter all or part of the required search criteria then click the **Search** button.*



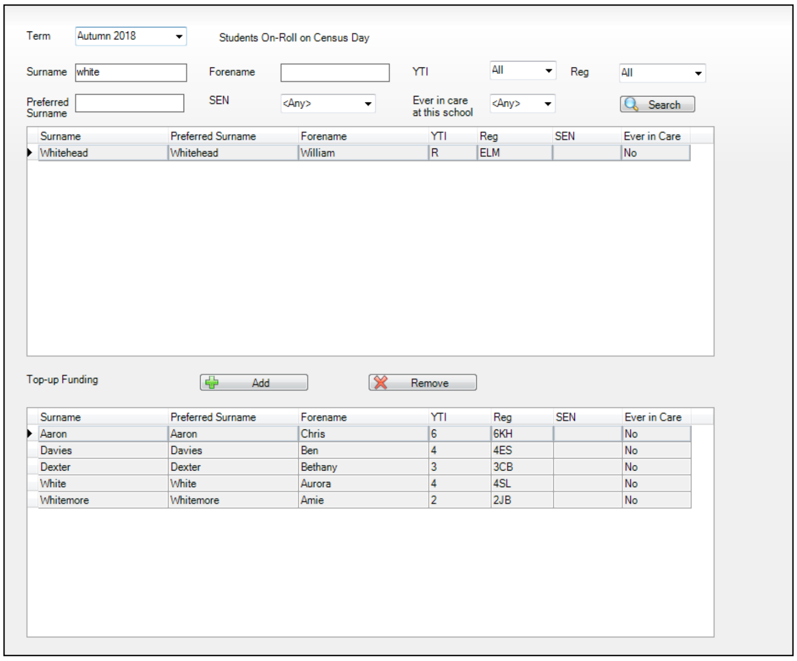
Term: Autumn 2018
Students On-Roll on Census Day
Surname: white
Forename:
YTI: All
Reg: All
Preferred Surname:
SEN: <Any>
Ever in care at this school: <Any>

| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in Care |
|---|---|---|---|---|---|---|
| White | White | Aurora | 4 | 4SL | | No |
| Whitehead | Whitehead | William | R | ELM | | No |
| Whitemore | Whitemore | Amie | 2 | 2JB | | No |

Top-up Funding

3. Highlight the pupil/student(s) who you want to record as having top-up funding then click the **Add** button to move the selected pupil/student(s) to the **Top-up Funding** list.

   One or more pupil/students can be selected using the **Ctrl**+**click** or **Shift**+**click** functionality.



Term: Autumn 2018
Students On-Roll on Census Day
Surname: white
Forename:
YTI: All
Reg: All
Preferred Surname:
SEN: <Any>
Ever in care at this school: <Any>

| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in Care |
|---|---|---|---|---|---|---|
| Whitehead | Whitehead | William | R | ELM | | No |

Top-up Funding

| Surname | Preferred Surname | Forename | YTI | Reg | SEN | Ever in Care |
|---|---|---|---|---|---|---|
| Aaron | Aaron | Chris | 6 | 6KH | | No |
| Davies | Davies | Ben | 4 | 4ES | | No |
| Dexter | Dexter | Bethany | 3 | 3CB | | No |
| White | White | Aurora | 4 | 4SL | | No |
| Whitemore | Whitemore | Amie | 2 | 2JB | | No |

4. To remove a pupil/student from the **Top-up Funding** list, highlight the required pupil/student then click the **Remove** button. The pupil/student's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
5. Click the **Update** button to save the data and arrange the list of pupil/students in **Surname** order.
6. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.

**Additional Resources:**

*Preparing for the School Census Autumn 2018 Return* handbook

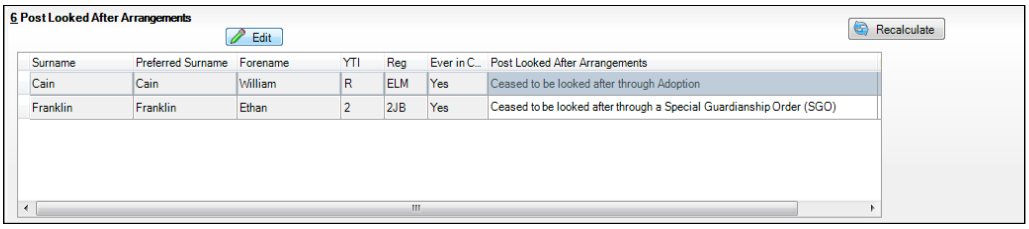
**More Information:**
*Top-up Funding Report* on page *41*

# Editing Pupil/Student Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether pupil/students who are on-roll on census day were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order.

If the pupil/students with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Student Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

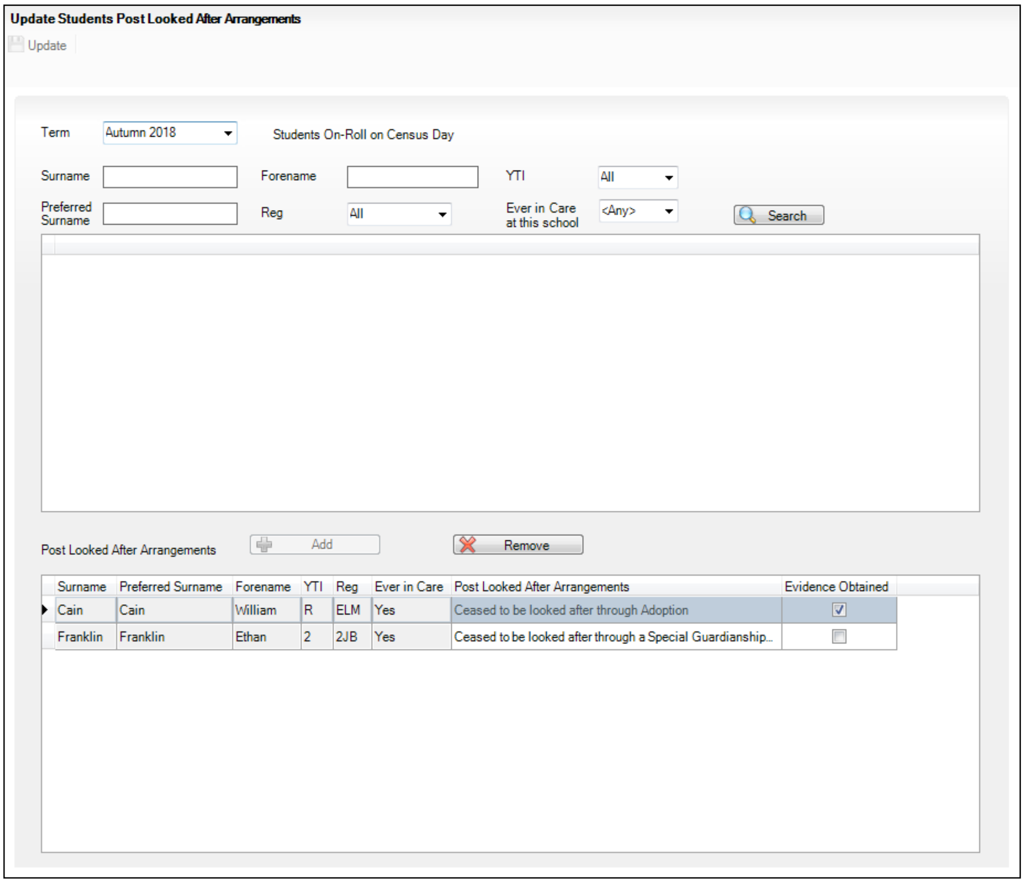
1. Click the **Recalculate** button (in the **Post Looked After Arrangements** panel) to ensure that all pupil/students who already have a PLAA status are displayed.



| Surname | Preferred Surname | Forename | YTI | Reg | Ever in C... | Post Looked After Arrangements |
|---|---|---|---|---|---|---|
| Cain | Cain | William | R | ELM | Yes | Ceased to be looked after through Adoption |
| Franklin | Franklin | Ethan | 2 | 2JB | Yes | Ceased to be looked after through a Special Guardianship Order (SGO) |

The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a pupil/student, must be done via the **Edit** button.

2. Click the **Edit** button to display the **Update Pupil** (or **Student**)**s Post Looked After Arrangements** page. Any pupil/students currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list (located in the bottom half of the page).


Update Students Post Looked After Arrangements
Update
Surname
Forename
Preferred Surname
Search
Add
Remove

Term: Autumn 2018

Students On-Roll on Census Day

YTI: All

Reg: All

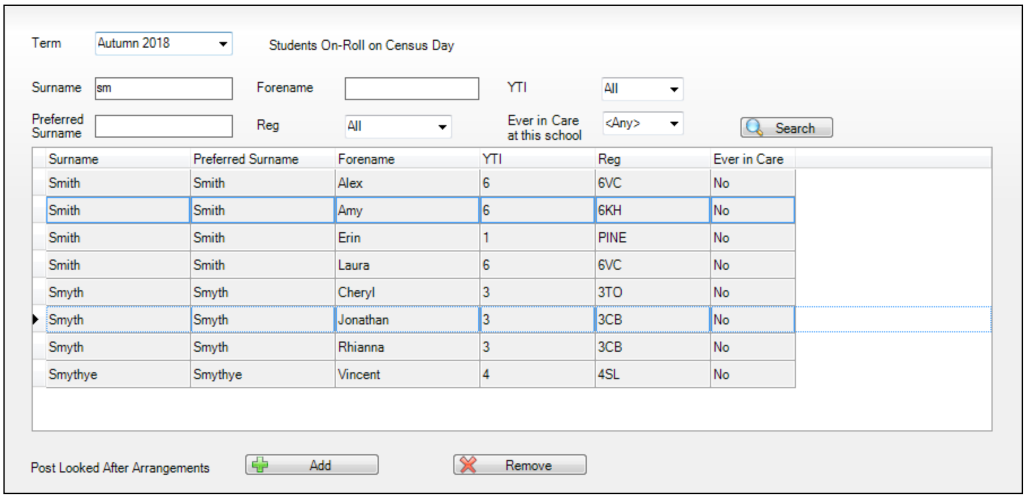
Ever in Care at this school: <Any>

Post Looked After Arrangements

| Surname | Preferred Surname | Forename | YTI | Reg | Ever in Care | Post Looked After Arrangements | Evidence Obtained |
|---|---|---|---|---|---|---|---|
| Cain | Cain | William | R | ELM | Yes | Ceased to be looked after through Adoption | ☑ |
| Franklin | Franklin | Ethan | 2 | 2JB | Yes | Ceased to be looked after through a Special Guardianship... | ☐ |

3. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupil/students you wish to record as having PLAA.

> *TIP: Click the **Search** button to display a list of pupil/students who have not been defined as having PLAA. Alternatively, enter all or part of the required search criteria then click the **Search** button.*



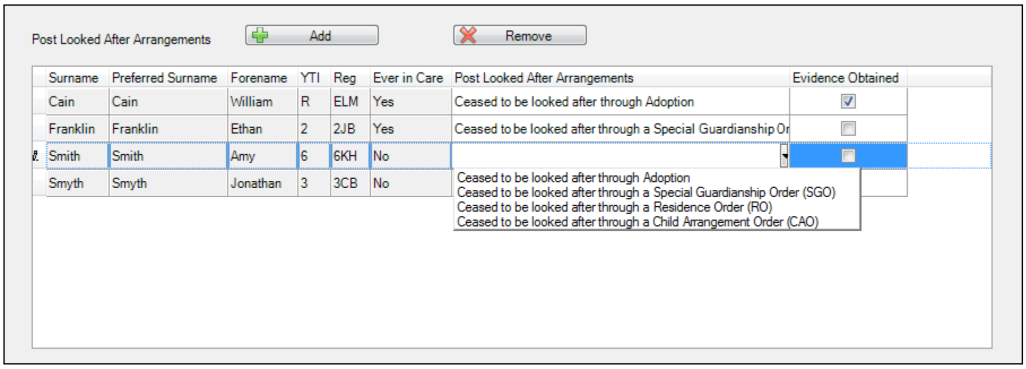
Students On-Roll on Census Day
Search
Post Looked After Arrangements
Add
Remove

Term: Autumn 2018
Surname: sm
Forename:
YTI: All
Preferred Surname:
Reg: All
Ever in Care at this school: <Any>

| Surname | Preferred Surname | Forename | YTI | Reg | Ever in Care |
|---|---|---|---|---|---|
| Smith | Smith | Alex | 6 | 6VC | No |
| Smith | Smith | Amy | 6 | 6KH | No |
| Smith | Smith | Erin | 1 | PINE | No |
| Smith | Smith | Laura | 6 | 6VC | No |
| Smyth | Smyth | Cheryl | 3 | 3TO | No |
| Smyth | Smyth | Jonathan | 3 | 3CB | No |
| Smyth | Smyth | Rhianna | 3 | 3CB | No |
| Smythye | Smythye | Vincent | 4 | 4SL | No |

4. Highlight the pupil/students who you want to record as having PLAA then click the **Add** button to move the selected pupil/students automatically to the **Post Looked After Arrangements** list.

   One or more pupil/students can be selected using the **Ctrl**+**click** or **Shift**+**click** functionality.



Post Looked After Arrangements
Add
Remove
Ceased to be looked after through Adoption
Ceased to be looked after through a Special Guardianship Order (SGO)
Ceased to be looked after through a Residence Order (RO)
Ceased to be looked after through a Child Arrangement Order (CAO)

| Surname | Preferred Surname | Forename | YTI | Reg | Ever in Care | Post Looked After Arrangements | Evidence Obtained |
|---|---|---|---|---|---|---|---|
| Cain | Cain | William | R | ELM | Yes | Ceased to be looked after through Adoption | ☑ |
| Franklin | Franklin | Ethan | 2 | 2JB | Yes | Ceased to be looked after through a Special Guardianship Or | ☐ |
| Smith | Smith | Amy | 6 | 6KH | No |  | ☐ |
| Smyth | Smyth | Jonathan | 3 | 3CB | No |  |  |

5. For each pupil/student added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Post Looked After Arrangements** column then selecting the required status from the drop-down list:
   - **Ceased to be looked after through Adoption**
   - **Ceased to be looked after through a Special Guardianship Order (SGO)**
   - **Ceased to be looked after through a Residence Order (RO)**
   - **Ceased to be looked after through a Child Arrangement Order (CAO)**.

> *NOTE:* ***Ceased to be looked after through a Residence Order*** *(**RO**) has been replaced by* ***Ceased to be looked after through a Child Arrangement Order*** *(**CAO**).*
>
> *You do not need to change any existing residence orders but new post looked after arrangements must be recorded as child arrangement orders.*

6. Select the **Evidence Obtained** check box if documents have been obtained that provide evidence of the post looked after arrangements.

> *NOTE:* ***Evidence Obtained*** *is not collected in the School Census return but should be recorded as proof of DfE/Ofsted compliance.*

7. To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
8. Click the **Update** button to save the information and arrange the list of pupil/students in surname order.

   If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.
9. Click the **OK** button to continue.
10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.

**Additional Resources:**

*Preparing for the School Census Autumn 2018 Return* handbook

**More Information:**
*Post Looked After Arrangements Report* on page *42*

## Managing School Dinners Taken on Census Day

Applicable to schools with pupils in Reception, Year 1 and Year 2

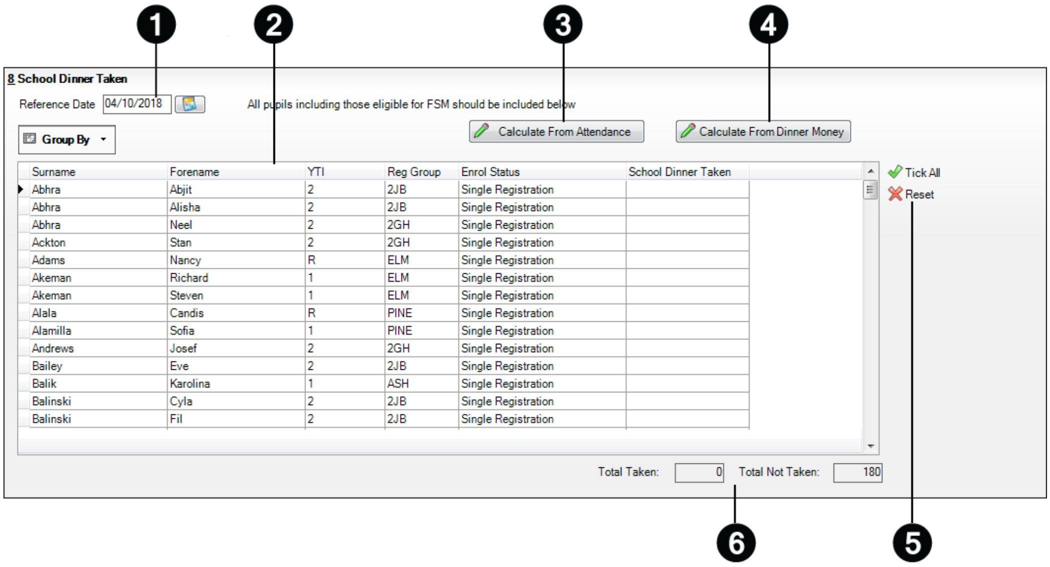
> *NOTE for Special schools: The School Dinner Taken routine is applicable to Special schools that have on-roll pupils who have taken a school dinner on census day and who are in Year Taught In Reception, Year 1 or Year 2 and those in Year Taught In X aged four to six who were born between 01/09/2011 and 31/08/2014 inclusive.*

All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the local authority. The School Census Autumn 2018 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

The **School Dinner Taken** panel displays all pupils in Reception, Year 1 and Year 2 who are on-roll on census day. The options available in the panel enable you to record pupils who have taken a Universal Infant School Meals on census day, so that accurate data can be included in the census.

> *NOTES: The **Reference Date** is provided so that your school can report school dinners taken on an alternative date to census day, if required.*
>
> *The pupils listed in the **School Dinner Taken** panel are those who are on-roll on census day. Whereas the data calculated via the **Calculate From Attendance** and the **Calculate From Dinner Money** buttons is based on the reference date.*

If your school uses SIMS Dinner Money or SIMS Attendance, the number of dinners taken on census day can be calculated using the data recorded when using these modules. If either or both of these modules are not in use, the applicable **Calculate From** button(s), as displayed in the following graphic, are not displayed but the information can be recorded manually.



Reference Date 04/10/2018

All pupils including those eligible for FSM should be included below

| Surname | Forename | YTI | Reg Group | Enrol Status | School Dinner Taken |
|---|---|---|---|---|---|
| Abhra | Abjit | 2 | 2JB | Single Registration | |
| Abhra | Alisha | 2 | 2JB | Single Registration | |
| Abhra | Neel | 2 | 2GH | Single Registration | |
| Ackton | Stan | 2 | 2GH | Single Registration | |
| Adams | Nancy | R | ELM | Single Registration | |
| Akeman | Richard | 1 | ELM | Single Registration | |
| Akeman | Steven | 1 | ELM | Single Registration | |
| Alala | Candis | R | PINE | Single Registration | |
| Alamilla | Sofia | 1 | PINE | Single Registration | |
| Andrews | Josef | 2 | 2GH | Single Registration | |
| Bailey | Eve | 2 | 2JB | Single Registration | |
| Balik | Karolina | 1 | ASH | Single Registration | |
| Balinski | Cyla | 2 | 2JB | Single Registration | |
| Balinski | Fil | 2 | 2JB | Single Registration | |

Total Taken: 0 Total Not Taken: 180

| | |
|---|---|
| ❶ | By default, the **Reference Date** is set to 04/10/2018 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation. |
| ❷ | Click the required column header to sort the data. |
| ❸ | The **Calculate From Attendance** button is displayed only if SIMS Attendance is in use. |
| ❹ | The **Calculate from Dinner Money** button is displayed only if SIMS Dinner Money is in use. |
| ❺ | When the **Reset** button is clicked all existing ticks are removed from the **School Dinner Taken** column enabling you to start the process again. |
| ❻ | The **Total Taken** and **Total Not Taken** provide an indication of whether the number of school dinners taken is correct or whether edits are required. |

After the return has been created and validated, the School Dinner Taken detail report can be run to assist with the checking of results.

**More Information:**
*School Dinner Taken Report* on page *40*

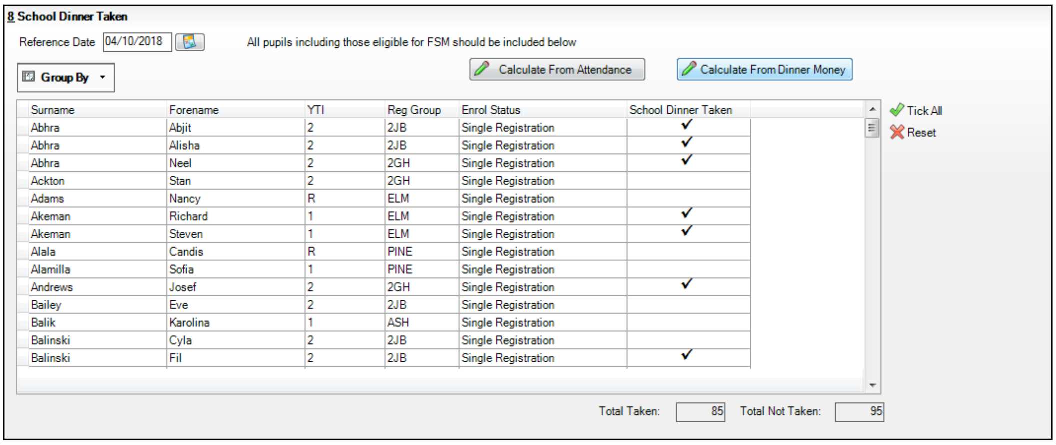
## Using Dinner Money to Calculate School Dinners Taken on Census Day

If SIMS Dinner Money is in use, the Dinner Money data recorded for census day can be used to calculate the number of school dinners taken on census day.

Many users of SIMS Dinner Money also use SIMS Attendance. If this is the case the **Calculate From Attendance** button is also displayed.

However, it is recommended that the Calculate From Dinner Money routine is used in the first instance. This is because the Calculate From Attendance routine looks at all pupils with a present or late attendance mark on census day morning. These pupils could be taking any sort of meal on census day, e.g. going home for lunch, pack lunch brought from home, as well as meals provided by the school. The School Census return is only interested in school meals provided by the school.

SIMS Dinner Money takes into account these different meal types and populates the **School Dinner Taken** column with ticks where meals provided by the school only have been taken.



8 School Dinner Taken

Reference Date 04/10/2018

All pupils including those eligible for FSM should be included below

| Surname | Forename | YTI | Reg Group | Enrol Status | School Dinner Taken |
|---|---|---|---|---|---|
| Abhra | Abjit | 2 | 2JB | Single Registration | ✓ |
| Abhra | Alisha | 2 | 2JB | Single Registration | ✓ |
| Abhra | Neel | 2 | 2GH | Single Registration | ✓ |
| Ackton | Stan | 2 | 2GH | Single Registration | |
| Adams | Nancy | R | ELM | Single Registration | |
| Akeman | Richard | 1 | ELM | Single Registration | ✓ |
| Akeman | Steven | 1 | ELM | Single Registration | ✓ |
| Alala | Candis | R | PINE | Single Registration | |
| Alamilla | Sofia | 1 | PINE | Single Registration | |
| Andrews | Josef | 2 | 2GH | Single Registration | ✓ |
| Bailey | Eve | 2 | 2JB | Single Registration | |
| Balik | Karolina | 1 | ASH | Single Registration | |
| Balinski | Cyla | 2 | 2JB | Single Registration | |
| Balinski | Fil | 2 | 2JB | Single Registration | ✓ |

Total Taken: 85 Total Not Taken: 95

1. Click the **Calculate From Dinner Money** button.

> ***WARNING:*** *Clicking the* ***Calculate From Dinner Money*** *button overwrites all existing data in the* ***School Dinner Taken*** *panel.*

If SIMS detects missing information, the following message is displayed:

**Dinner Money information is incomplete. Please ensure that meals are recorded in Dinner Money.**

2. Click the **Cancel** button to return to SIMS where the missing information can be entered or the **OK** button to continue.

A tick is entered against each pupil who is receiving any type of meal provided by the school on census day. These meals have a meal type category of **School Provided**, with a description such as hot school meal or school sandwich.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

## Using Attendance to Calculate School Dinners Taken on Census Day

The School Census Return only requires information about school meals provided by the school on census day. However, if SIMS Attendance is in use, the attendance data recorded for census day morning can be used to calculate all pupils who are present and are likely to be taking a school dinner.

The information calculated from attendance can be edited to so that school meals provided by the school only are collected in the return.

1. Click the **Calculate From Attendance** button.

> ***WARNING:*** *Clicking the* ***Calculate From Attendance*** *button overwrites existing data in the* ***School Dinner Taken*** *panel.*

If missing marks exist, a message is displayed:

**Please ensure that registers have been taken. Missing marks have been interpreted as absent and no dinner taken.**

2. Click the **Cancel** button to return to SIMS where missing marks can be entered or the **OK** button to continue.

A tick is entered against each pupil who is marked as present on census day morning (i.e. AM session). It is possible that some of these pupils are not taking meals provided by the school, e.g. they go home for dinner or bring a packed lunch from home. Meals provided by the school only are required for the return.

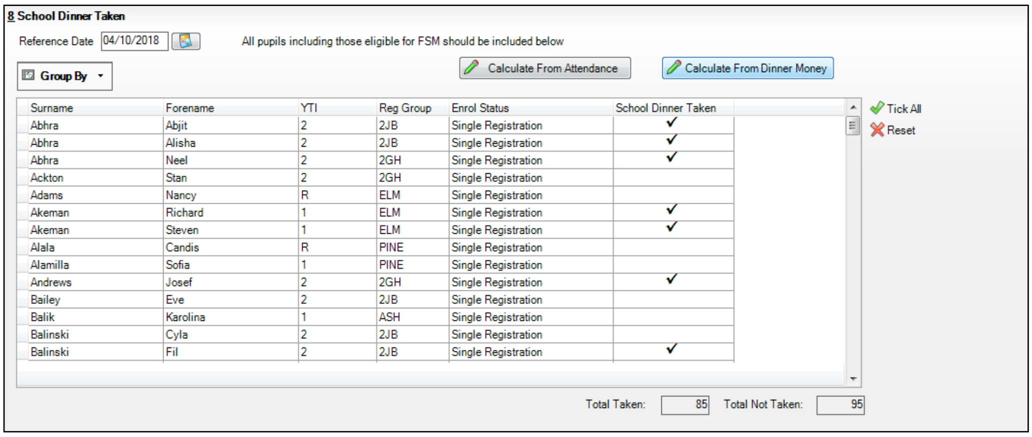
Use the **Group By** functionality to group pupils by **Year Taught In**, **Reg Group** or **Enrolment Status**, enabling school dinners taken information to be updated from class lists, etc.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

## Using Manual Entry to Record School Dinners Taken on Census Day

If your school is not using SIMS Dinner Money or SIMS Attendance the number of school dinners taken on census day (i.e. meals provided by the school) can be entered manually.

1. Click the **Tick All** button to populate the **School Dinner Taken** column. All pupils are ticked indicating that they received a school dinner on census day.
2. Edit individual records by clicking the applicable **School Dinner Taken** cell to toggle between a tick and blank (no meal taken).



Reference Date 04/10/2018

All pupils including those eligible for FSM should be included below

| Surname | Forename | YTI | Reg Group | Enrol Status | School Dinner Taken |
|---|---|---|---|---|---|
| Abhra | Abjit | 2 | 2JB | Single Registration | ✓ |
| Abhra | Alisha | 2 | 2JB | Single Registration | ✓ |
| Abhra | Neel | 2 | 2GH | Single Registration | ✓ |
| Ackton | Stan | 2 | 2GH | Single Registration | |
| Adams | Nancy | R | ELM | Single Registration | |
| Akeman | Richard | 1 | ELM | Single Registration | ✓ |
| Akeman | Steven | 1 | ELM | Single Registration | ✓ |
| Alala | Candis | R | PINE | Single Registration | |
| Alamilla | Sofia | 1 | PINE | Single Registration | |
| Andrews | Josef | 2 | 2GH | Single Registration | ✓ |
| Bailey | Eve | 2 | 2JB | Single Registration | |
| Balik | Karolina | 1 | ASH | Single Registration | |
| Balinski | Cyla | 2 | 2JB | Single Registration | |
| Balinski | Fil | 2 | 2JB | Single Registration | ✓ |

Total Taken: 85 Total Not Taken: 95

The **Total Taken** and **Total Not Taken** (located at the bottom of the panel) provide an indication of whether the number of school dinners taken is correct or whether further edits are required.

3. After the return has been created and validated, run the School Dinner Taken detail report and then check the report contents.
4. Continue editing until school dinner taken details are correct.

> ***WARNING:*** *Clicking the* ***Reset*** *button removes all existing ticks from the* ***School Dinner Taken*** *column.*

# Entering Attendance Information

Summer term attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupil/students aged four to 15 inclusive on 31/08/2017 who were on-roll for at least one session during each Summer half term, i.e. from 02/04/2018 to 27/05/2018 and 28/05/2018 to 31/07/2018.

> ***IMPORTANT NOTE:*** *Clicking the* ***Calculate All Details*** *button overwrites any edited data in every panel with the original data stored in SIMS. Do not use this button if you wish to keep any changes you have made.*

After the **Calculate All Details** button is clicked, the information displayed in the **Attendance** panel is dependent on which of the following is applicable to your school:

- Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either missing marks or no missing marks.
- Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.
- Attendance/Lesson Monitor is not in use.

## SIMS Attendance/Lesson Monitor Users

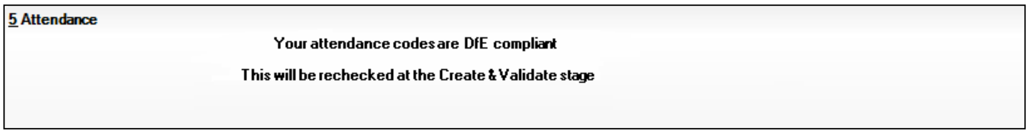
If SIMS Attendance/Lesson Monitor is in use, ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

> *TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.*

### Are your Attendance Codes DfE Compliant?

If Attendance/Lesson Monitor is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are no missing marks.

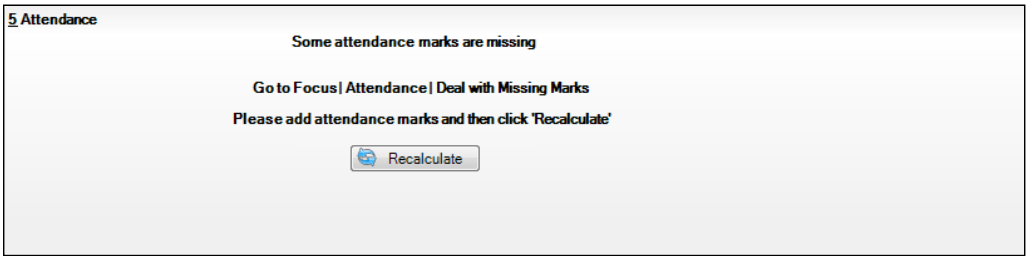
If all attendance marks have been entered in Attendance/Lesson Monitor, the following message is displayed in the **Attendance** panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.



Your attendance codes are DfE compliant

This will be rechecked at the Create & Validate stage

However, if any missing attendance marks are detected, the following message is displayed in the **Attendance** panel, requesting that you add the missing attendance marks.



Some attendance marks are missing

Go to Focus | Attendance | Deal with Missing Marks

Please add attendance marks and then click 'Recalculate'

1. Use the Deal with Missing Marks routine (**Focus | Attendance** (or **Lesson Monitor**) **| Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** panel to ensure that all missing marks have been dealt with.

> *NOTE: The Create and Validate process can still be run even if some attendance marks are missing. You will be asked if you wish to continue to create the return or cancel the Create and Validate process.*

**More Information:**
*Producing Detail Reports* on page *38*

## Are your Attendance Codes DfE Non-Compliant?

If Attendance/Lesson Monitor is in use but one or more invalid attendance codes have been detected, e.g. the **F**, **Z** or **@** code is in use, a message is displayed in the **Attendance** panel to inform you that your attendance codes are not DfE compliant.

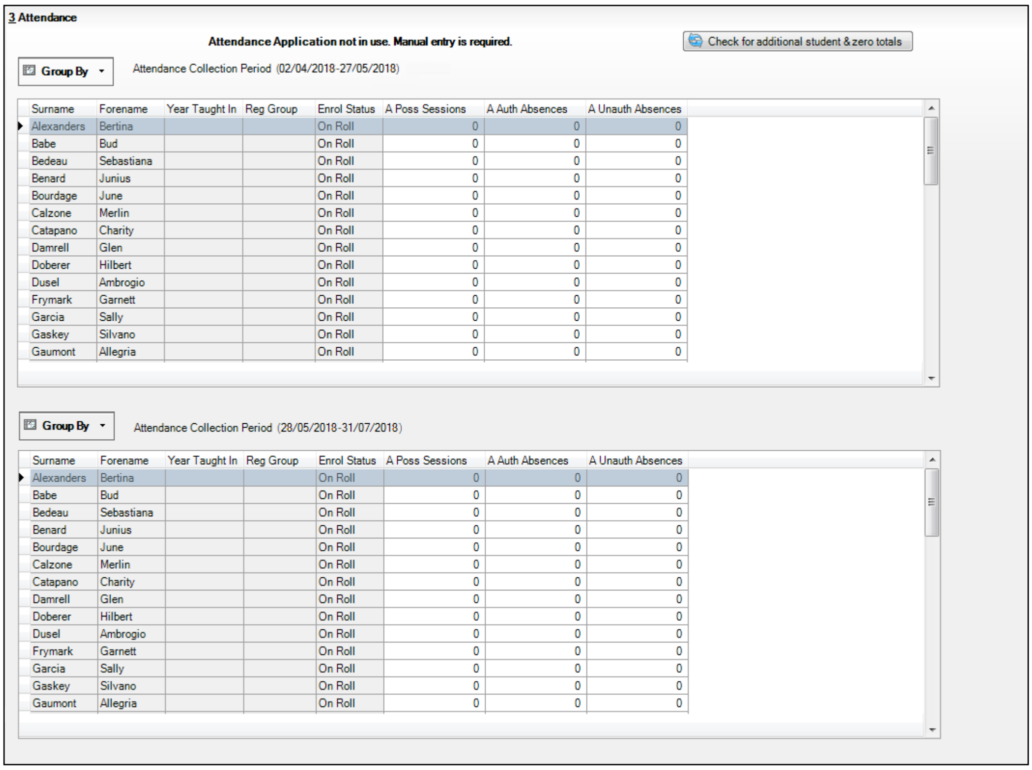
1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

   If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.
3. Click the **OK** button to continue.

## SIMS Attendance/Lesson Monitor Not in Use

If Attendance/Lesson Monitor is not in use, the following data must be entered manually for the two specified collection periods, i.e. from 02/04/2018 to 27/05/2018 and 28/05/2018 to 31/07/2018:

- Total Possible Sessions (**T Poss Sessions**)
- Total Sessions Missed due to Authorised Absence (**T Auth Absences**)
- Total Sessions Missed due to Unauthorised Absence (**T Unauth Absences**).



**Attendance Application not in use. Manual entry is required.**

Attendance Collection Period (02/04/2018-27/05/2018)

| Surname | Forename | Year Taught In | Reg Group | Enrol Status | A Poss Sessions | A Auth Absences | A Unauth Absences |
|---|---|---|---|---|---|---|---|
| Alexanders | Bertina | | | On Roll | 0 | 0 | 0 |
| Babe | Bud | | | On Roll | 0 | 0 | 0 |
| Bedeau | Sebastiana | | | On Roll | 0 | 0 | 0 |
| Benard | Junius | | | On Roll | 0 | 0 | 0 |
| Bourdage | June | | | On Roll | 0 | 0 | 0 |
| Calzone | Merlin | | | On Roll | 0 | 0 | 0 |
| Catapano | Charity | | | On Roll | 0 | 0 | 0 |
| Damrell | Glen | | | On Roll | 0 | 0 | 0 |
| Doberer | Hilbert | | | On Roll | 0 | 0 | 0 |
| Dusel | Ambrogio | | | On Roll | 0 | 0 | 0 |
| Frymark | Garnett | | | On Roll | 0 | 0 | 0 |
| Garcia | Sally | | | On Roll | 0 | 0 | 0 |
| Gaskey | Silvano | | | On Roll | 0 | 0 | 0 |
| Gaumont | Allegria | | | On Roll | 0 | 0 | 0 |

Attendance Collection Period (28/05/2018-31/07/2018)

| Surname | Forename | Year Taught In | Reg Group | Enrol Status | A Poss Sessions | A Auth Absences | A Unauth Absences |
|---|---|---|---|---|---|---|---|
| Alexanders | Bertina | | | On Roll | 0 | 0 | 0 |
| Babe | Bud | | | On Roll | 0 | 0 | 0 |
| Bedeau | Sebastiana | | | On Roll | 0 | 0 | 0 |
| Benard | Junius | | | On Roll | 0 | 0 | 0 |
| Bourdage | June | | | On Roll | 0 | 0 | 0 |
| Calzone | Merlin | | | On Roll | 0 | 0 | 0 |
| Catapano | Charity | | | On Roll | 0 | 0 | 0 |
| Damrell | Glen | | | On Roll | 0 | 0 | 0 |
| Doberer | Hilbert | | | On Roll | 0 | 0 | 0 |
| Dusel | Ambrogio | | | On Roll | 0 | 0 | 0 |
| Frymark | Garnett | | | On Roll | 0 | 0 | 0 |
| Garcia | Sally | | | On Roll | 0 | 0 | 0 |
| Gaskey | Silvano | | | On Roll | 0 | 0 | 0 |
| Gaumont | Allegria | | | On Roll | 0 | 0 | 0 |

1. To filter the display of pupil/students in the **Attendance** panel, select **Year Group, Registration Group** or **Enrolment Status** from the **Group By** drop-down list.

   Alternatively, select **Group by None** to display a list of all pupil/students.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column heading.
3. For each pupil/student, enter the total number of possible sessions (**T Poss Sessions**), authorised absences (**T Auth Absences**) and unauthorised absences (**T Unauth Absences**) for each of the collection periods.
4. To clear the attendance information and check for additional pupil/students, click the **Check for additional students & zero totals** button.

> ***WARNING:*** *If the **Check for additional students & zero totals** button is clicked, any attendance data entered manually is lost.*

# 04| Completing the School Census Autumn Return

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## Creating and Validating a School Census Return

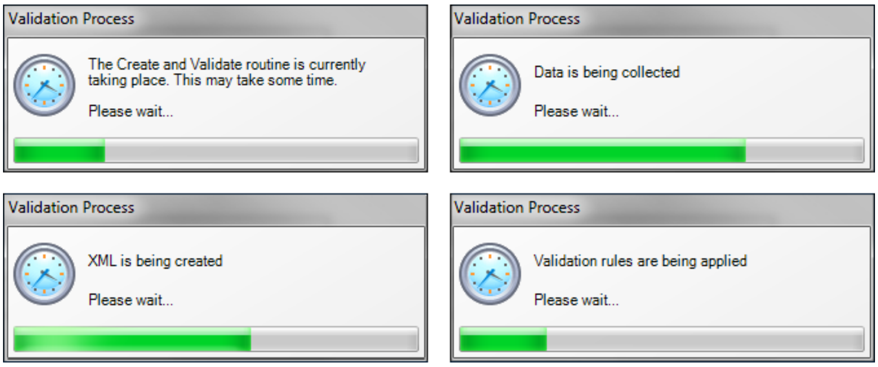
A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

An error is caused by either missing or inaccurate data, whilst a query highlights data which is unusual or not as expected, e.g. there are no pupil/students with special educational needs.

1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to begin the process. There may be a short delay, depending on the number of pupil/students at your school.

A progress bar is displayed indicating that the Create and Validate process is being performed.



The Create and Validate routine is currently taking place. This may take some time.

Please wait...

Data is being collected

Please wait...

XML is being created

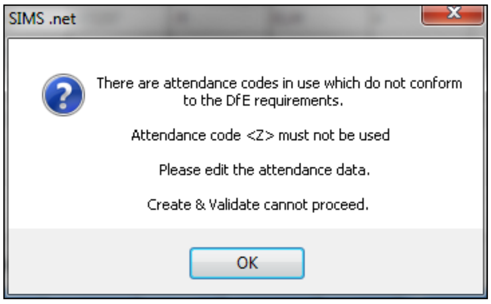
Please wait...

Validation rules are being applied

Please wait...

If there is an irregularity in the attendance marks, one of the following messages is displayed:

- If the attendance codes are not DfE compliant, the following message is displayed, informing you which code(s) must not be used.



There are attendance codes in use which do not conform to the DfE requirements.

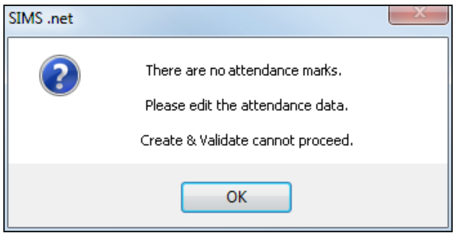
Attendance code <Z> must not be used

Please edit the attendance data.

Create & Validate cannot proceed.

The lack of compliance must be dealt with before the Create and Validate process can be performed. Please contact your Local Support Unit for assistance.

- If no attendance marks are found and SIMS Attendance is in use, the following message is displayed informing you that the create and validate process cannot proceed.



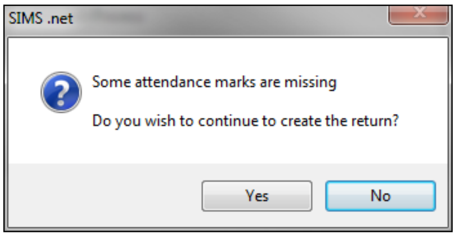
There are no attendance marks.

Please edit the attendance data.

Create & Validate cannot proceed.

Click the **OK** button then edit the attendance data before attempting to create and validate the return again.

- If there are any missing attendance marks, the following message is displayed enquiring as to whether you wish to continue with the Create and Validate process.



Some attendance marks are missing

Do you wish to continue to create the return?

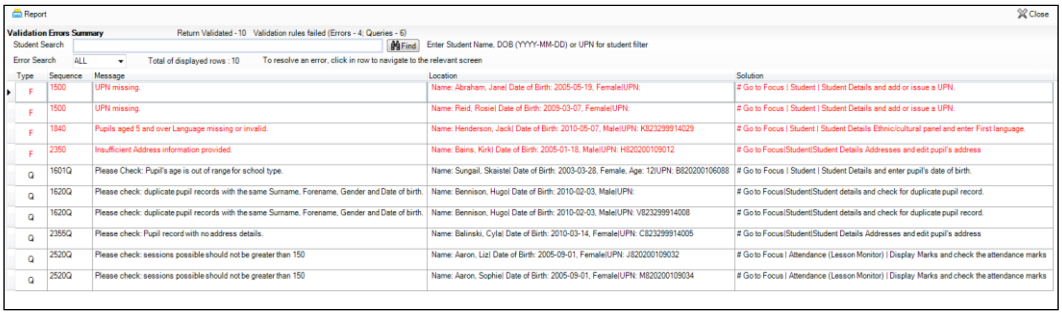
Click the **Yes** button to continue creating and validating the data.

Alternatively, click the **No** button to cancel the process, then use the Deal with Missing Marks routine (**Focus | Attendance | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes. For more information, please refer to the *Managing Pupil/Student Attendance* handbook, as appropriate.

When the validation process is complete, the **Validation Errors Summary** panel is displayed at the bottom of the screen.

## Resolving Validation Errors and Checking Queries

After creating the return file and validating the data, any errors and queries found are listed in the **Validation Errors Summary** panel at the bottom of the **Census Return Details** page.



**Validation Errors Summary** Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6)

Student Search Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

Error Search ALL Total of displayed rows : 10 To resolve an error, click in row to navigate to the relevant screen

| Type | Sequence | Message | Location | Solution |
|---|---|---|---|---|
| F | 1500 | UPN missing. | Name: Abraham, Jane\| Date of Birth: 2005-05-19, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1500 | UPN missing. | Name: Reid, Rosie\| Date of Birth: 2009-03-07, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1840 | Pupils aged 5 and over Language missing or invalid. | Name: Henderson, Jack\| Date of Birth: 2010-05-07, Male\|UPN: K823299914029 | # Go to Focus \| Student \| Student Details Ethnic/cultural panel and enter First language. |
| F | 2350 | Insufficient Address information provided. | Name: Bains, Kirk\| Date of Birth: 2005-01-18, Male\|UPN: H820200109012 | # Go to Focus\|Student\|Student Details Addresses and edit pupil's address |
| Q | 1601Q | Please Check: Pupil's age is out of range for school type. | Name: Sungail, Skaiste\| Date of Birth: 2003-03-28, Female, Age: 12\|UPN: B820200106088 | # Go to Focus \| Student \| Student Details and enter pupil's date of birth. |
| Q | 1620Q | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugo\| Date of Birth: 2010-02-03, Male\|UPN: | # Go to Focus\|Student\|Student details and check for duplicate pupil record. |
| Q | 1620Q | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugo\| Date of Birth: 2010-02-03, Male\|UPN: V823299914008 | # Go to Focus\|Student\|Student details and check for duplicate pupil record. |
| Q | 2355Q | Please check: Pupil record with no address details. | Name: Balinski, Cyla\| Date of Birth: 2010-03-14, Female\|UPN: C823299914005 | # Go to Focus\|Student\|Student Details Addresses and edit pupil's address |
| Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Aaron, Liz\| Date of Birth: 2005-09-01, Female\|UPN: J820200109032 | # Go to Focus \| Attendance (Lesson Monitor) \| Display Marks and check the attendance marks |
| Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Aaron, Sophie\| Date of Birth: 2005-09-01, Female\|UPN: M820200109034 | # Go to Focus \| Attendance (Lesson Monitor) \| Display Marks and check the attendance marks |

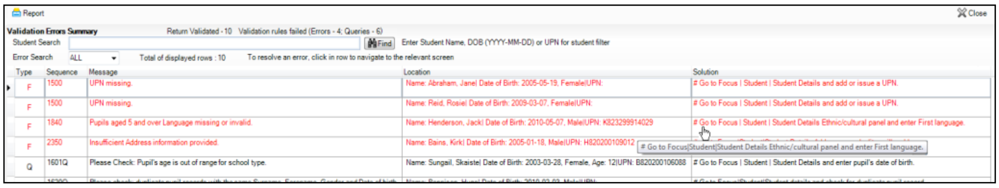
The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel.

Details about each of the errors and queries found are displayed in the columns as described in the following table.

| Column | Description |
|---|---|
| **Type** | Displays the type of validation rule:<br>Failure (**F** displayed in red) indicates an error, which must be corrected.<br>Query (**Q** displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary. |
| **Sequence** | Shows the error or query number. |
| **Message** | Displays the text of the error or query message. |
| **Location** | Lists the specific record containing the error or query. |
| **Solution** | Provides a suggestion on how the error can be corrected or the query checked. Many solutions have a hyperlink (indicated by a **#**) to the appropriate area of SIMS. |

To assist in the resolution of any errors and queries:

- When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the mouse pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the issue can be checked.



Validation Errors Summary  Return Validated - 10  Validation rules failed (Errors - 4; Queries - 6)

Student Search: Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

Error Search: ALL  Total of displayed rows : 10  To resolve an error, click in row to navigate to the relevant screen

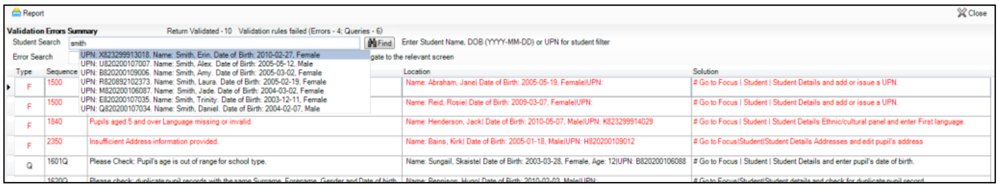
| Type | Sequence | Message | Location | Solution |
|---|---|---|---|---|
| F | 1500 | UPN missing. | Name: Abraham, Jane\| Date of Birth: 2005-05-19, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1500 | UPN missing. | Name: Reid, Rosie\| Date of Birth: 2009-03-07, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1840 | Pupils aged 5 and over Language missing or invalid. | Name: Henderson, Jack\| Date of Birth: 2010-05-07, Male\|UPN: K823299914029 | # Go to Focus \| Student \| Student Details Ethnic/cultural panel and enter First language. |
| F | 2350 | Insufficient Address information provided. | Name: Bains, Kirk\| Date of Birth: 2005-01-18, Male\|UPN: H820200109012 | |
| Q | 1601Q | Please Check: Pupil's age is out of range for school type. | Name: Sungail, Skaiste\| Date of Birth: 2003-03-28, Female, Age: 12\|UPN: B820200106088 | # Go to Focus \| Student \| Student Details and enter pupil's date of birth. |

# Go to Focus|Student|Student Details Ethnic/cultural panel and enter First language.

> *NOTE: A hyperlink is also indicated by a hash symbol (**#**) preceding the **Solution** text.*

Click the appropriate hyperlink to display the specific SIMS area where the record(s) can be checked or corrected.

- The Student Search functionality can be used to display all errors and queries relating to a particular pupil/student. Enter all or part of a UPN, pupil/student's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list to populate the **Student Search** field. Click the **Find** button to display the applicable validation records.



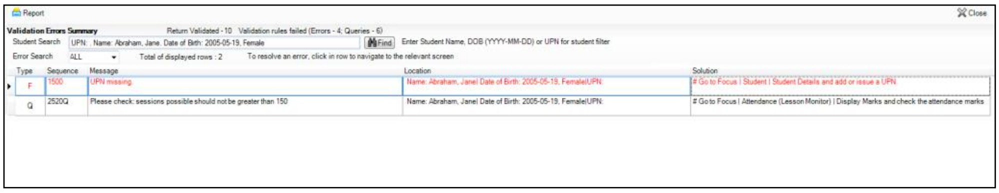
Validation Errors Summary  Return Validated - 10  Validation rules failed (Errors - 4; Queries - 6)

Student Search: smith  Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

UPN: X823299913018. Name: Smith, Erin. Date of Birth: 2010-02-27, Female
UPN: U820200107007. Name: Smith, Alex. Date of Birth: 2005-05-12, Male
UPN: B820200109006. Name: Smith, Amy. Date of Birth: 2005-03-02, Female
UPN: R820892102373. Name: Smith, Laura. Date of Birth: 2005-02-19, Female
UPN: M820200106087. Name: Smith, Jade. Date of Birth: 2004-03-02, Female
UPN: E820200107035. Name: Smith, Trinity. Date of Birth: 2003-12-11, Female
UPN: Q820200107034. Name: Smith, Daniel. Date of Birth: 2004-02-07, Male

| Type | Sequence | Message | Location | Solution |
|---|---|---|---|---|
| F | 1500 | | Name: Abraham, Jane\| Date of Birth: 2005-05-19, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1500 | | Name: Reid, Rosie\| Date of Birth: 2009-03-07, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1840 | Pupils aged 5 and over Language missing or invalid. | Name: Henderson, Jack\| Date of Birth: 2010-05-07, Male\|UPN: K823299914029 | # Go to Focus \| Student \| Student Details Ethnic/cultural panel and enter First language. |
| F | 2350 | Insufficient Address information provided. | Name: Bains, Kirk\| Date of Birth: 2005-01-18, Male\|UPN: H820200109012 | # Go to Focus\|Student\|Student Details Addresses and edit pupil's address |
| Q | 1601Q | Please Check: Pupil's age is out of range for school type. | Name: Sungail, Skaiste\| Date of Birth: 2003-03-28, Female, Age: 12\|UPN: B820200106088 | # Go to Focus \| Student \| Student Details and enter pupil's date of birth. |

- Click a **Solution** hyperlink to display the area of SIMS where the associated issue can be checked and/or corrected. When you return to the **Validation Errors Summary** panel, the details of the applicable pupil/student are displayed in the **Student Search** field. Click the **Find** button to display all errors and queries relating to that pupil/student.



**Validation Errors Summary** Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6)

Student Search: UPN: , Name: Abraham, Jane, Date of Birth: 2005-05-19, Female

Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

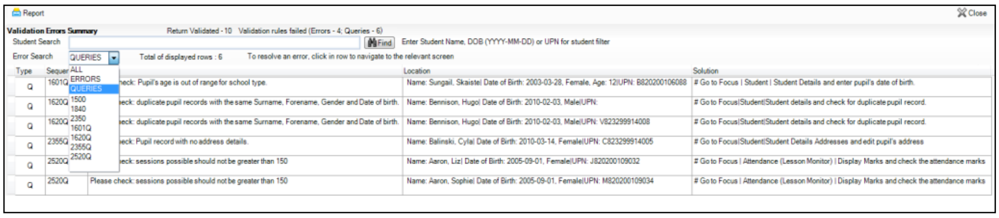
Error Search: ALL

Total of displayed rows : 2

To resolve an error, click in row to navigate to the relevant screen

| Type | Sequence | Message | Location | Solution |
|---|---|---|---|---|
| F | 1500 | UPN missing. | Name: Abraham, Janel Date of Birth: 2005-05-19, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Abraham, Janel Date of Birth: 2005-05-19, Female\|UPN: | # Go to Focus \| Attendance (Lesson Monitor) \| Display Marks and check the attendance marks |

- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.



**Validation Errors Summary** Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6)

Student Search:

Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

Error Search: QUERIES

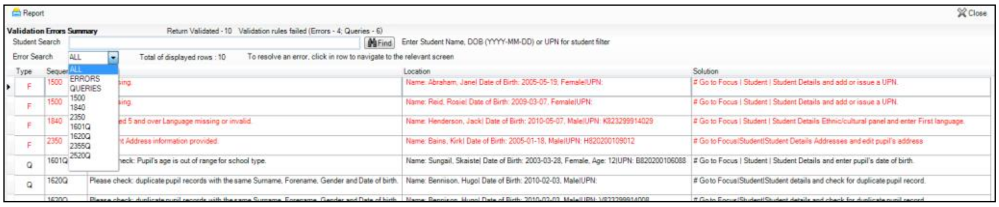
Total of displayed rows : 6

To resolve an error, click in row to navigate to the relevant screen

| Type | Sequer | | Location | Solution |
|---|---|---|---|---|
| Q | 1601Q | eck: Pupil's age is out of range for school type. | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12\|UPN: B820200106088 | # Go to Focus \| Student \| Student Details and enter pupil's date of birth. |
| Q | 1620Q | eck: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male\|UPN: | # Go to Focus\|Student\|Student details and check for duplicate pupil record. |
| Q | 1620Q | eck: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male\|UPN: V823299914008 | # Go to Focus\|Student\|Student details and check for duplicate pupil record. |
| Q | 2355Q | eck: Pupil record with no address details. | Name: Balinski, Cylal Date of Birth: 2010-03-14, Female\|UPN: C823299914005 | # Go to Focus\|Student\|Student Details Addresses and edit pupil's address |
| Q | 2520Q | eck: sessions possible should not be greater than 150 | Name: Aaron, Liz\| Date of Birth: 2005-09-01, Female\|UPN: J820200109032 | # Go to Focus \| Attendance (Lesson Monitor) \| Display Marks and check the attendance marks |
| Q | 2520Q | Please check: sessions possible should not be greater than 150 | Name: Aaron, Sophiel Date of Birth: 2005-09-01, Female\|UPN: M820200109034 | # Go to Focus \| Attendance (Lesson Monitor) \| Display Marks and check the attendance marks |

- By default, when **ALL** is selected from the **Errors Search** drop-down list, the errors are displayed at the top of the list.

  The order of the items in the list can be changed by clicking the appropriate column heading.



**Validation Errors Summary** Return Validated - 10 Validation rules failed (Errors - 4; Queries - 6)

Student Search:

Enter Student Name, DOB (YYYY-MM-DD) or UPN for student filter

Error Search: ALL

Total of displayed rows : 10

To resolve an error, click in row to navigate to the relevant screen

| Type | Seque | | Location | Solution |
|---|---|---|---|---|
| F | 1500 | sing. | Name: Abraham, Janel Date of Birth: 2005-05-19, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1500 | sing. | Name: Reid, Rosiel Date of Birth: 2009-03-07, Female\|UPN: | # Go to Focus \| Student \| Student Details and add or issue a UPN. |
| F | 1840 | ed 5 and over Language missing or invalid. | Name: Henderson, Jackl Date of Birth: 2010-05-07, Male\|UPN: K823299914029 | # Go to Focus \| Student \| Student Details Ethnic/cultural panel and enter First language. |
| F | 2350 | t Address information provided. | Name: Bains, Kirkl Date of Birth: 2005-01-18, Male\|UPN: H820200109012 | # Go to Focus\|Student\|Student Details Addresses and edit pupil's address |
| Q | 1601Q | eck: Pupil's age is out of range for school type. | Name: Sungail, Skaistel Date of Birth: 2003-03-28, Female, Age: 12\|UPN: B820200106088 | # Go to Focus \| Student \| Student Details and enter pupil's date of birth. |
| Q | 1620Q | Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth. | Name: Bennison, Hugol Date of Birth: 2010-02-03, Male\|UPN: | # Go to Focus\|Student\|Student details and check for duplicate pupil record. |

  The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.

- View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located at the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Internet Explorer®, where it can be printed or transferred to another application, if required (please see *Transferring Report Data to a Spreadsheet* on page *44*).

The report (`Validation Errors Summary.HTML`) is saved automatically in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser. The original report, which was generated when the **Create & Validate** button was clicked (e.g. `<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_ValidationErrorsSummary.HTML`), is also stored in this folder.

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

Resolve as many errors and check as many queries as possible then revalidate the return details. Continue to resolve failures and revalidate the return as many times as necessary.

*NOTE: All errors must be resolved and all queries must be investigated.*

If at any point you wish to hide the list of error and queries, click the **Close** button located at the top right-hand side of the **Validation Errors Summary** panel. The list is displayed again when the Create and Validate process is run.

Many of the errors generated can be fixed quickly using bulk update functionality (via **Routines | Pupil** (or **Student**) **| Bulk Update**). For more information, please refer to the *Managing Pupil/Students* handbook.

In addition to the **Validation Errors Summary**, an Errors and Resolutions document containing a list of all errors/queries that can be generated is being produced. Explanations and information on how to resolve the errors or whether the queries can be ignored are also included. The document can help to identify the order in which errors should be corrected. For example, if a UPN is missing, several UPN related errors might be generated. Therefore, adding missing UPNs can remove several errors.

**More Information:**
*Transferring Report Data to a Spreadsheet* on page *44*

## Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return. The reports can be produced as soon as the return has been created and validated.

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupil** (or **Student**)**s** who are listed in the report. Also included in the report header is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

Where a pupil/student’s National Curriculum Year group is different from what their date of birth would suggest, the applicable **YTI** cell is highlighted in yellow.

The following reports are currently available.

### On Roll Basic Details Report

Report Criteria: Pupil/students on-roll on census day.

This report provides the following information about pupil/students who are on-roll on census day: UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth, gender, year taught in (YTI), date of admission (DOA), enrolment status, language, Youth Support Services Agreement (YSSA), part-time status and boarder status.

### Leavers Basic Details Report

Report Criteria: Pupil/students not on-roll on census day:

- Leavers with attendance 1 term ago (02/04/2018 to 31/07/2018)
- Leavers with exclusions 2 terms ago (01/01/2018 to 01/04/2018).

This report provides the following information about pupil/students not on-roll on census day (Leavers): UPN, ULN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), language, part-time status, boarder status, attendance status, and exclusion status.

### Exclusions Report

Report Criteria: On-roll pupil/students and leavers with exclusions two terms ago (01/01/2018 to 01/04/2018). Not applicable to pupil/students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

This report provides the following details about pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), exclusion category, reason for exclusion, exclusion start date, number of session excluded from, SEN provision and on-roll status.

### Attendance First Half of Summer Term Report

Report Criteria: Pupil/students with attendance from 02/04/2018 to 27/05/2018. On-roll pupil/students and leavers (but not boarders) who were aged four to 15 at 31/08/2017.

This report displays the following information about pupil/students and their attendance during the first half of the Summer term: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), number of termly sessions possible, number of termly absence sessions, on-roll status, termly attendance codes (authorised sessions and unauthorised sessions) and the number of sessions where attendance was not required.

Totals are displayed at the bottom of the applicable columns.

A list of attendance codes and their descriptions are displayed at the bottom of the report.

## Attendance Second Half of Summer Term Report

Report Criteria: Pupil/students with attendance one term ago (28/05/2018 to 31/07/2018). On-roll and leavers (but not boarders) who were aged four to 15 at 31/08/2017.

This report displays the following information about pupil/students and their attendance during the second half of the Summer term: UPN, legal surname, legal forename, date-of-birth (DOB), gender, year taught in (YTI), number of termly sessions possible, number of termly absence sessions, on-roll status, termly attendance codes (authorised sessions and unauthorised sessions) and the number of sessions where attendance was not required.

Totals are displayed at the bottom of the applicable columns.

A list of attendance codes and their descriptions are displayed at the bottom of the report.

## Absentees Report

Report Criteria: Pupil/students who have missed 14 sessions and whose absence might need to be tracked. On-roll pupil/students and leavers (not boarders) with attendance one term ago (02/04/2018 to 27/05/2018) who were aged four to 15 at 31/08/2017, not including the second half of the summer term.

The number of sessions possible and the number of authorised plus unauthorised absences applicable to each of the pupil/students are shown on this report.

The report also provides the following basic details about the pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), on-roll status and enrolment status.

## SEN Report

Report Criteria: On-roll pupil/student with SEN Provision/Status = **S** (Statement), **E** (Education, Health and Care Plan) or **K** (SEN Support).

This report provides a list of pupil/students who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), SEN provision, and on-roll status.

## Address Details Report

Report Criteria: Pupil/students on-roll on census day.

This report provides a list of pupil/students, their UPN, former UPN, legal surname, legal forename, middle name(s), post code, unique property reference number (UPRN), address details and the administrative area/county.

Definition: Unique Property Reference Number (UPRN) is a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

## School Dinner Taken Report

Report Criteria: Pupil/students on-roll on census day, who have taken school dinner on the reference date.

- Pupil/students in Year Taught In R, 1 and 2.

- Pupil/students in Year Taught In X who are aged four to six and who were born between 01/09/2011 and 31/08/2014 inclusive (Special schools only).

The report header also displays the total number of pupil/students, the total number of school dinners taken and the total number of school dinners not taken.

This report provides the following information about pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and school dinner taken (yes/no).

## Free School Meal Eligibility Report

Report Criteria: On-roll pupil/students on census day who were eligible for free school meals on or after 18/05/2018 and up to and including census day.

This report provides information on free school meal eligibility for pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), on-roll status and free school meal eligibility start date, end date and the UK country in which the eligibility applies.

*NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.*

*Only Free School Meals records where the country recorded is England or <blank> attract the Pupil Premium.*

## AP Placements Report

Report Criteria: Pupil/students on-roll on census day having Alternative Provision (AP) Placements between 18/05/2018 and 04/10/2018.

This report provides the following information: UPN, legal surname, legal forename, start date, end date, AP URN, AP UKPRN, AP Setting, AP Association, AP Reason, AP Attendance and AP sessions.

## Top-up Funding Report

Report Criteria: On-roll pupil/students who have been awarded Top-up Funding as at census day.

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and SEN provision.

## Early Years Report

Report Criteria: Pupils on-roll on census day who have early years data.

- All 2 year olds born between 01/09/2015 and 31/08/2016 (Hours at setting and Funded Hours only)
- All 3 year olds born between 01/09/2014 and 31/08/2015
- All 4 year olds born between 01/09/2013 and 31/08/2014 with Year Taught In E1, E2, N1 or N2.

The report provides the following information for each early years pupil: UPN, legal name, legal forename, date of birth (DOB), gender, year taught in (YTI), hours at setting, funded hours, 30 hour code, extended funded hours and disability access fund.

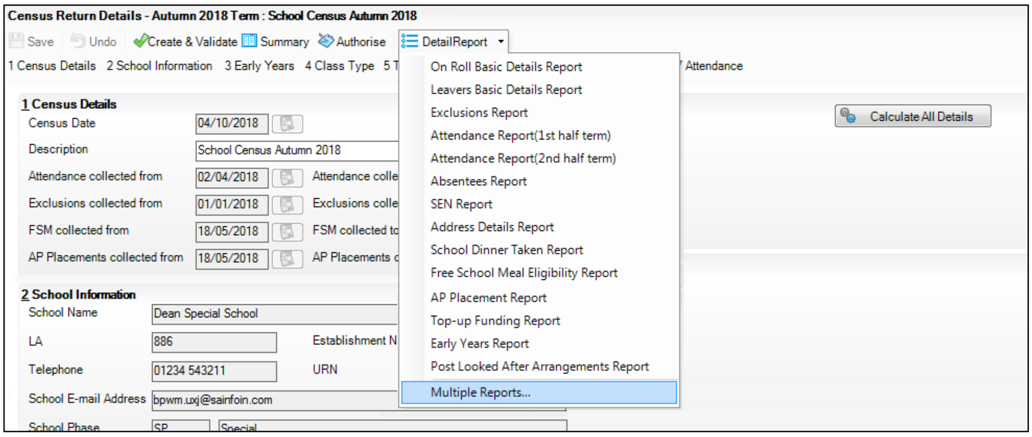
## Post Looked After Arrangements Report

Report Criteria: On-roll pupil/students who have post looked after arrangements as at census day.

The report provides the following information about pupil/students who have post looked after arrangements: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and post looked after arrangements, e.g. ceased to be looked after through a special guardianship order (SGO).

## Generating Detail Reports

To select a single detail report, select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically and displayed in your web browser, e.g. Internet Explorer®.



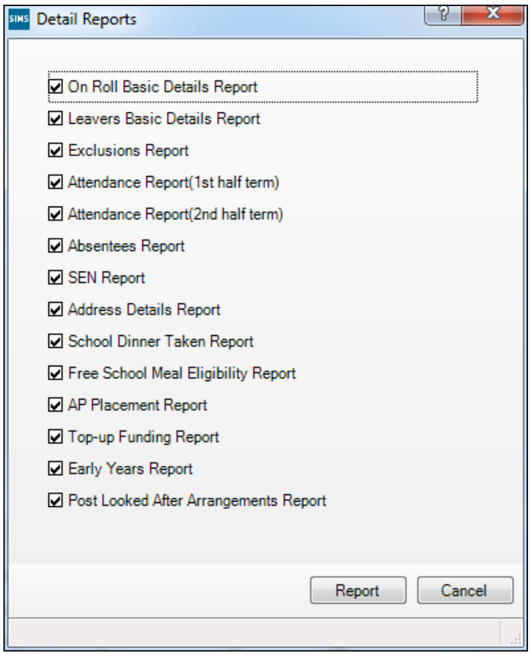
Census Return Details - Autumn 2018 Term : School Census Autumn 2018

1 Census Details
Census Date: 04/10/2018
Description: School Census Autumn 2018
Attendance collected from: 02/04/2018
Exclusions collected from: 01/01/2018
FSM collected from: 18/05/2018
AP Placements collected from: 18/05/2018

2 School Information
School Name: Dean Special School
LA: 886
Telephone: 01234 543211
School E-mail Address: bpwm.uxj@sainfoin.com
School Phase: SP Special

Save
Undo
Create & Validate
Summary
Authorise
DetailReport
1 Census Details
2 School Information
3 Early Years
4 Class Type
5 T
Attendance
Attendance colle
Exclusions colle
FSM collected to
AP Placements c
Establishment N
URN
Calculate All Details
On Roll Basic Details Report
Leavers Basic Details Report
Exclusions Report
Attendance Report(1st half term)
Attendance Report(2nd half term)
Absentees Report
SEN Report
Address Details Report
School Dinner Taken Report
Free School Meal Eligibility Report
AP Placement Report
Top-up Funding Report
Early Years Report
Post Looked After Arrangements Report
Multiple Reports...

To run several detail reports, select **Multiple Reports** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog.



☑ On Roll Basic Details Report
☑ Leavers Basic Details Report
☑ Exclusions Report
☑ Attendance Report(1st half term)
☑ Attendance Report(2nd half term)
☑ Absentees Report
☑ SEN Report
☑ Address Details Report
☑ School Dinner Taken Report
☑ Free School Meal Eligibility Report
☑ AP Placement Report
☑ Top-up Funding Report
☑ Early Years Report
☑ Post Looked After Arrangements Report

By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected reports, which are displayed in your web browser from where the data can be transferred to a spreadsheet such as Microsoft® Excel if required.

The report(s) are saved automatically in the **School Census Folder**, which was specified in the **Census Return** browser, e.g. `S:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that is made up of the following data fields separated by underscores ('_'):

`<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_Report.html`

For example:
`8864676_SC3_886LL18_001_onroll_pupil_basic_details_report.html`.

**More Information:**
*Specifying the Security Message for Reports* on page *11*
*Transferring Report Data to a Spreadsheet* on page *44*

# Printing a Report from your Web Browser

***IMPORTANT NOTE:*** *Any printed reports containing information that could identify a person (e.g. their name, address, UPN, etc.) should be used for validation purposes only and should not be retained. The Security Message (displayed at the top of each report) can be customised to include instructions for the destruction of the printed reports, if required.*

1. With the generated report displayed in your web browser, select **File | Print** to display the **Print** dialog.
2. Ensure that the print settings are correct then click the **Print** button.
3. Click the **Close** button on the top right-hand corner of the web page to close the report and return to the census page.

# Transferring Report Data to a Spreadsheet

Transferring a report to a spreadsheet application enables the data to be sorted, the column order to be changed, etc.

In your web browser, right-click the report then select the required option, e.g. **Export to Microsoft Excel**, from the drop-down list.

The spreadsheet contains the same level of sensitive information as the original HTML report from which it was transferred therefore, it is important that the file is saved to a folder with the same level of security.

# Deleting Temporary Web Browser Files

It is recommended that, after viewing statutory returns reports, you delete any temporary web browser files to ensure that any cached data (i.e. data stored on the PC itself, which enables high-speed access to previously viewed data) is removed.

This prevents the information, e.g. copies of web pages that are stored in the local cache for faster viewing, remaining on the hard disk of the PC in the temporary directory, where they are not secure because they can still be accessed.

## Deleting the cache in Internet Explorer 10

1. Open Internet Explorer 10, then select **Tools | Internet options** to display the **Internet Options** dialog.
2. Select the **General** tab.
3. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.

   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
5. Click the **OK** button.

### Deleting the cache in Internet Explorer 8 and 9

1. Open Internet Explorer 8 or 9, then click the **Tools** button located at the far right-hand side of the toolbar.
2. Select **Internet options** from the drop-down list to display the **Internet Options** dialog.
3. Select the **General** tab.
4. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
5. Ensure that the **Temporary Internet Files** check box is selected then click the **Delete** button.

   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
6. Click the **OK** button.

   If a different web browser is in use, please refer to the help file applicable to that software package.

## Producing the Summary Report

The Summary report enables the accuracy and completeness of the return to be assessed by the school staff involved in preparing the return. It can also be used to assist the Head Teacher in the checking of data before authorising the return.

*NOTE: When the return is authorised, the Summary report is automatically generated and displayed in your web browser, e.g. Windows® Internet Explorer.*

### Generating the Summary Report

Click the **Summary** button located at the top of the **Census Return Details** page. The report is automatically displayed in your web browser, e.g. Internet Explorer®, but can be transferred to a spreadsheet such as Microsoft® Excel if required.

The report is saved automatically in the **Census Folder**, which was specified in the **Census Return** browser, e.g. `S:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that is made up of the following data fields separated by underscores (‘_’):

`<LACode><SchoolNumber>_<SurveyType>_ <LACode><LL><Year>_ <SerialNumber>_<name of the report>_Report.html`

For example: `8864676_SC3_886LL18_001_Summary_Report.html`.

It is important that the Head Teacher checks all the information on the Summary report before the return is authorised. Your LA/DfE might request that a copy of the Summary report (which is automatically generated when the return is authorised) is signed by the Head Teacher and sent to the LA/DfE when the return has been authorised.

**More Information:**
*Specifying the Security Message for Reports* on page *11*
*Generating Detail Reports* on page *42*
*Transferring Report Data to a Spreadsheet* on page *44*
*Authorising the Return* on page *47*
*Deleting an Unauthorised Return* on page *52*

## Editing an Unauthorised Return

The return details, e.g. **Description**, **School Information**, etc. can be edited via the **Census Return Details** page at any time prior to authorisation.

***IMPORTANT NOTE:*** *An authorised return cannot be edited. If changes are required to an authorised return, use the* ***Copy*** *facility to produce a duplicate return (with a unique description) in which the changes can be made.*

1. Select **Routines | Statutory Returns | <census name>** to display the browser.
2. Ensure that the **Census Folder** and the **Security message for Reports** are correct then click the **Search** button to display any previously created returns. Unauthorised returns can be recognised by their `.UNA` suffix.
3. Double-click the required return. Alternatively, highlight the required return then click the **Open** button to display the **Census Return Details** page.
4. Edit the return details as required.
5. Ensure that the correct value for historical spot allowances has not been specified via **Tools | Setups | Employment Parameters**.
6. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
7. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.
8. Repeat the editing process again, if necessary.
9. Click the **Save** button.

**More Information:**
*Configuring the Census Folder* on page *10*
*Specifying the Security Message for Reports* on page *11*
*Resolving Validation Errors and Checking Queries* on page *35*
*Producing Detail Reports* on page *38*
*Producing the Summary Report* on page *45*

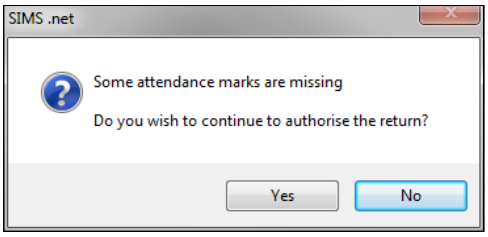
## Authorising the Return

A return must be authorised before it can be submitted to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

Before authorising the return, you should ensure that all the information displayed on the **Census Return Details** page is correct and does not require further editing. This is because it is not possible to edit details after the return is authorised. The Summary report can assist in reviewing the information.

1. Click the **Authorise** button.

   If missing marks exist, the following message is displayed.



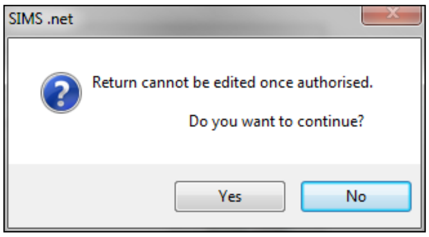
SIMS .net

Some attendance marks are missing

Do you wish to continue to authorise the return?

2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

   If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.



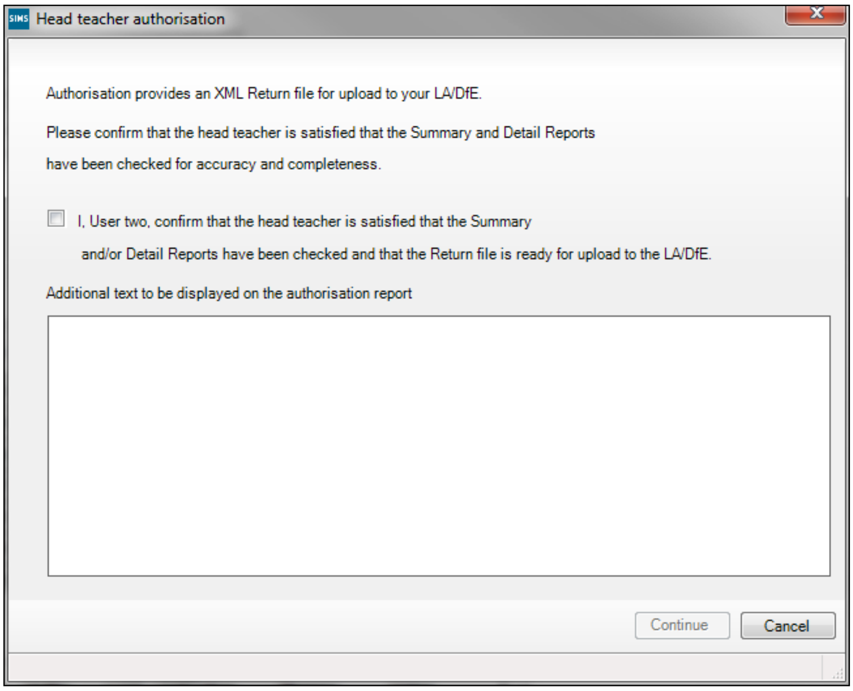
SIMS .net

Return cannot be edited once authorised.

Do you want to continue?

3. Click the **Yes** button to continue or the **No** button to return to SIMS where edits can be made to the data before authorising.

If you choose to continue, the **Head teacher authorisation** dialog is displayed.



Authorisation provides an XML Return file for upload to your LA/DfE.

Please confirm that the head teacher is satisfied that the Summary and Detail Reports have been checked for accuracy and completeness.

☐ I, User two, confirm that the head teacher is satisfied that the Summary and/or Detail Reports have been checked and that the Return file is ready for upload to the LA/DfE.

Additional text to be displayed on the authorisation report

4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.
5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.

   When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
6. Click the **Continue** button to authorise the return.
   - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.
   - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).
   - All details, i.e. the reports and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser.

     All reports can be viewed via **Tools | Statutory Return Tools | Retrieve Authorised Census Return Files**. This routine also provides the opportunity to download the files to a different folder.

     ***IMPORTANT NOTE:*** *Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.*

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

If you authorise a return and subsequently need to make amendments, you must either make a copy of the return and work on the copy, or create a new return.

After the return is authorised, reports based on cohorts can be created (via **Reports | Design Reports**), so that items collected in the return can be tracked. Provided that **Student** has been selected as the data area, the Statutory Returns sub-report is available for selection when specifying the fields to be included in the report (the last node).

**Additional Resources:**

*Designing and Running Reports* handbook

**More Information:**

*Producing the Summary Report* on page *45*
*Retrieving Authorised Census Return Files* on page *50*
*Copying a Return* on page *51*

## Submitting the Return

When the return has been completed and the Summary report has been signed by the Head Teacher (if requested to do so by your LA), the `.XML` file can be uploaded to the DfE COLLECT data collection website or sent to your LA, depending on the instructions you have been given.

The authorised return file is located in the folder previously specified in the return browser. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

***IMPORTANT NOTE:*** *An authorised file cannot be edited. If you need to make changes to an authorised file, you must make a copy of the original file, rename it and work on the copy.*

**More Information:**

*Configuring the Census Folder* on page *10*
*Copying a Return* on page *51*

## Retrieving Authorised Census Return Files

Authorised returns are stored in your Document Management Server (DMS). The Returns Manager can download and run the reports associated with previous authorised returns enabling the data for the current return to be compared with that submitted previously.

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.
2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.
3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:
    a. Click the **Select a Folder** button (**...**) to display the **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

    > ***IMPORTANT NOTE:*** *Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.*

    For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

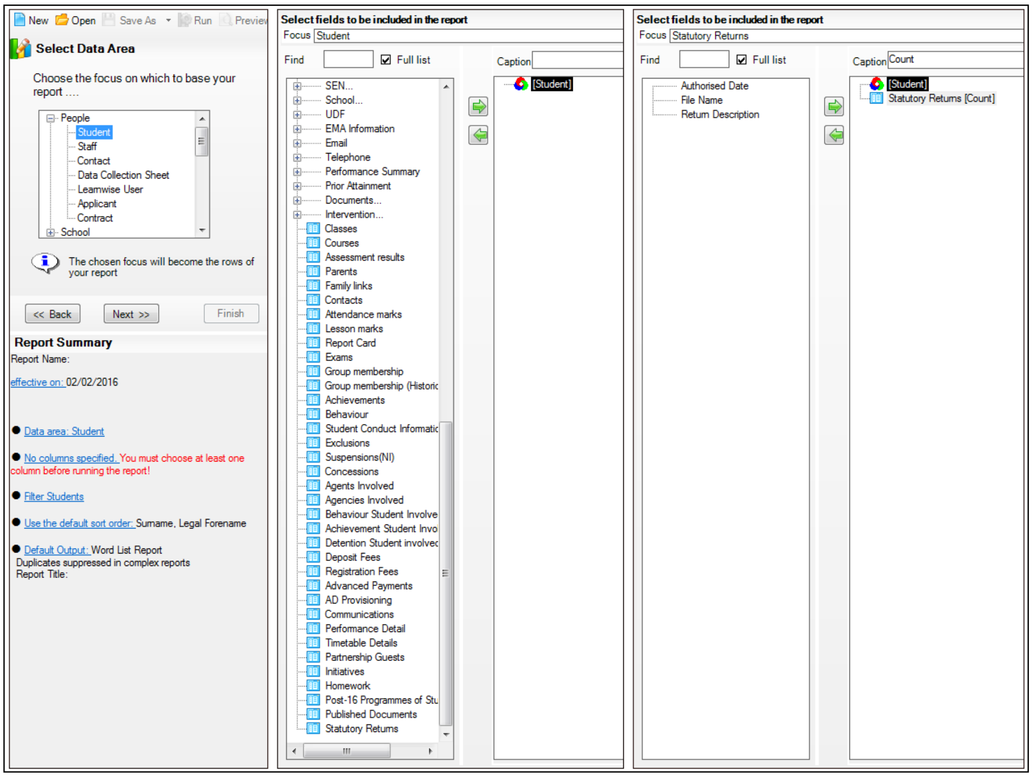
    b. Click the **OK** button to select or create the folder then return to the **Retrieve Authorised Return Files for <census name>** page where the chosen folder name is displayed in the **Download to** field.
4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

    The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.
5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

    If you want to create reports based on cohorts, so that items collected in the return can be tracked, a sub-report is available (via **Reports | Design Reports**).

    The **Statutory Returns** sub-report is available for selection only if **Student** has been selected as the Data Area.

When you **Select fields to be included in the report**, the **Statutory Returns** sub-report is located at the bottom of the list (the last node). Three options are available for selection under this sub-report: **Authorised Date**, **File Name** and **Return Description**.



Select Data Area

Choose the focus on which to base your report ....

The chosen focus will become the rows of your report

Report Summary

Report Name:

effective on: 02/02/2016

Data area: Student

No columns specified. You must choose at least one column before running the report!

Filter Students

Use the default sort order: Surname, Legal Forename

Default Output: Word List Report

Duplicates suppressed in complex reports

Report Title:

Select fields to be included in the report

Focus: Student

Select fields to be included in the report

Focus: Statutory Returns

Caption: Count

New
Open
Save As
Run
Preview
People
Student
Staff
Contact
Data Collection Sheet
Learnwise User
Applicant
Contract
School
<< Back
Next >>
Finish
Find
Full list
Caption
SEN...
School...
UDF
EMA Information
Email
Telephone
Performance Summary
Prior Attainment
Documents...
Intervention...
Classes
Courses
Assessment results
Parents
Family links
Contacts
Attendance marks
Lesson marks
Report Card
Exams
Group membership
Group membership (Historic
Achievements
Behaviour
Student Conduct Informatic
Exclusions
Suspensions(NI)
Concessions
Agents Involved
Agencies Involved
Behaviour Student Involve
Achievement Student Invo
Detention Student involvec
Deposit Fees
Registration Fees
Advanced Payments
AD Provisioning
Communications
Performance Detail
Timetable Details
Partnership Guests
Initiatives
Homework
Post-16 Programmes of Stu
Published Documents
Statutory Returns
[Student]
Authorised Date
File Name
Return Description
[Student]
Statutory Returns [Count]

**Additional Resources:**

*Designing and Running Reports* handbook

# Copying a Return

An unauthorised return can be copied and saved as a new return. This enables a 'snapshot' of a return to be taken at any time providing a backup of any manual changes that have been made to the return, for example before recalculating details.

This functionality can also be used to make a copy of an authorised return if the LA or DfE requires it to be resubmitted. The necessary corrections can then be made to the data. The copied return must be saved, created, validated and authorised before resubmitting.

*NOTE: Ensure that the return you wish to replicate is not open at the time of copying.*

1. Select **Routines | Statutory Returns | <name of census>** to display the census browser.
2. Click the **Search** button to ensure that the list of returns is displayed.
3. Highlight the file you wish to copy then click the **Copy** button.

A message requests confirmation that you wish to make a copy of the selected return.

> ***IMPORTANT NOTE:*** *Any values for attendance (where applicable), Early Years, Post Looked After Arrangements and Top-up Funding will not be copied but will be populated from the current values held in the database.*
>
> *The Create & Validate routine must be run to generate a new census file.*

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:

   **Copy of <description of selected file>**.
5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

> ***IMPORTANT NOTE:*** *The new* ***Description*** *must be unique for this return. SIMS will not save the data if a duplicate return description is found.*

## Deleting an Unauthorised Return

During the return process, a number of copies of the return may be created, e.g. to track progress. When the return has been authorised successfully, it is advisable to delete any versions of the return that are no longer required. This keeps the number of files in the storage folder and listed in the browser to a minimum, therefore removing confusion and lessening the risk of selecting the wrong return.

The delete routine can be used to remove unwanted returns at any time prior to the relevant return being authorised.

> ***IMPORTANT NOTES:*** *When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.*
>
> *Any return files that have already been authorised cannot be deleted.*

1. Select **Routines | Statutory Returns | <Return name>** to display the browser.
2. Click the **Search** button to ensure that the list of return files is displayed.
3. Highlight the return file to be deleted then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.
4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

   The deleted return file is removed from the browser and the storage folder, along with any associated reports.

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