

ICT Services

SIMS End of Academic Year 2023-24 & Promotion to 2024-25

Primary and Special Schools

This is subject to change depending on updated government guidance and clarification.

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Overview

IMPORTANT NOTE: The processes described in this document remain the same each year; they are not specific to a single academic year. The main changes made to this document each year relate to the graphical examples and the sample dates provided in graphics and in the body of the text.

In future years, if you wish to start your preparations for the next academic year before an updated End of Year Procedures document is made available, you can use the document prepared for the previous year as a guide, remembering to replace the sample dates with those applicable for your school in the forthcoming academic year.

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

It is applicable to Primary school SIMS users. Secondary school users should refer to the *Secondary School End of Year Procedures*, available from the Schools Portal.

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

Setting Permissions

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

Reviewing Permissions

Staff permissions should be reviewed regularly to ensure that staff can access only the areas of SIMS necessary to carry out their role at the school. For more information, please contact your System Administrator.

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, then select the document you require.

End of Year Procedure Check List

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

Complete	Description/Task
<input type="checkbox"/>	Record changes to teaching staff in Personnel (page 3).
<input type="checkbox"/>	Create the new academic year (page 6).
<input type="checkbox"/>	Set up the pastoral structure for the new academic year (page 15).
<input type="checkbox"/>	Add intake and admission groups (page 20).
<input type="checkbox"/>	Import Admissions and Transfer Files (page 22).
<input type="checkbox"/>	Import Common Transfer Files (page 22).
<input type="checkbox"/>	Check dates for part-time pupils (page 23).
<input type="checkbox"/>	Record leavers (page 25).
<input type="checkbox"/>	Export Common Transfer Files (page 27).
<input type="checkbox"/>	Set up the promotion mapping for the new academic year (page 29).

Complete	Description/Task
<input type="checkbox"/>	Change the status of applications (page 36).
<input type="checkbox"/>	Allocate applicants to registration group/classes (page 39).
<input type="checkbox"/>	Print class/registration group lists for the new academic year (page 41).
<input type="checkbox"/>	Enter reasons for absence last year (page 45).
<input type="checkbox"/>	Map meal charges (page 46).
<input type="checkbox"/>	Review staff permissions.

Routines for After the New Academic Year has Started

Complete	Description/Task
<input type="checkbox"/>	Admit applicants (page 47).
<input type="checkbox"/>	Re-admit pupils (page 49).
<input type="checkbox"/>	Print the official register for July (page 50).
<input type="checkbox"/>	Add 'Not Required' codes (page 51).
<input type="checkbox"/>	Run housekeeping routines (page 52).

Recording Changes to Teaching Staff in Personnel

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

Adding New Teachers to Personnel

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known. For full instructions, please refer to the *Managing Staff* handbook. (Click the **Documentation** button located on the top right-hand side of the SIMS **Home Page**, select the required category, then select the document you require).

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

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Add Employee

Basic Details

Surname: Forename:

Gender: Date of Birth: 



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



Calendar button

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

1 Employment Details

Teaching Staff: ☒ Teacher Number:

Teacher Category: Qualified Teacher Status:

Staff Code: Employee/Payroll No.:



Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
01/09/2009		01/09/2009	01/09/2009		

Check




Check	Clearance Date	Clearance Level
List 99	26/03/2009	List 99 Cleared
CRB Check	05/09/2011	CRB Enhanced Clearance




Contract





Status	Start Date	Post	Service Term	Point/Salary
	01/09/2016	TEACHER	Teachers Upper	1.0
	01/09/2009	Teacher	Teachers	6.0



Service Agreement

Start Date	End Date	Agreement Hours/Week

 New
 Open
 Delete

 New
 Open
 Delete

 New
 Open
 Delete
 Clone

 New
 Open

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

*NOTE: It is important to identify teachers by selecting this check box, as it ensures teachers are included in all applicable returns. For teaching staff, the relevant status also needs to be selected on the **Professional** tab.*

7. Select the required **Teacher Category** (e.g. **Qualified Teacher**) from the drop-down list.
8. Enter a **Teacher Number** if required. This must be in the format NN/NNNN, where N represents a number, e.g. **60/55916**.

9. Select the required **Qualified Teacher Status** from the drop-down list.
10. Enter a unique **Staff Code** (up to three characters), if required.
11. Enter the **Employee/Payroll No.**, if known.
12. In the **Employment Dates** panel, create or edit a record and record the **Continuous Service Start Date**, **Local Authority Start Date** and **Employment Start Date**, or click the respective **Calendar** buttons and select the required dates.
13. Record additional checks/information, as required.
14. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.



Completed

Adding Leaving Dates for Existing Staff Members in Personnel

Enter leaving dates for any staff members, as soon as they have left your school.

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

5. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.
6. Click the **OK** button to return to the **Employee Details** page.
7. Click the **Save** button to save the changes. Repeat for any other leavers.
8. If there are open contracts, these must be given a **Destination** before the record can be saved.

NOTE: A member of staff can also be made a leaver by ending their contract, as you will be presented with the following screen:



Completed

Creating the New Academic Year

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

IMPORTANT NOTES:

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

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

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

For example, if the academic year starts on 02/09/2024 then an end date of 01/09/2025 is automatically supplied.

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

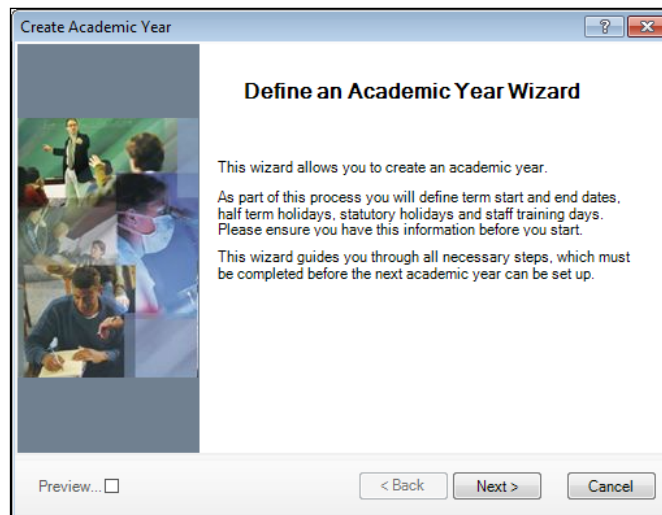
Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

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

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

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

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



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

Defining the School Working Week

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

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

1. Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.
2. Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

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

Create Academic Year

Define the terms and term holidays for the academic year
Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	02/09/2024	20/12/2024	Christmas Holiday
Spring Term	06/01/2025	04/04/2025	Easter Holiday
Summer Term	22/04/2025	29/07/2025	Summer Holiday

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

Add Term... Remove

Preview... ☐ < Back Next > Cancel

1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and then entering the required dates in dd/mm/yyyy format. Alternatively, click in the date cell to display a down arrow, then click the arrow to display a calendar, from which the required date can be selected.

Create Academic Year

Define the terms and term holidays for the academic year
Define the school terms start and end dates.

School Terms and Holidays

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

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

Add Term... Remove

Preview... ☐ < Back Next > Cancel

2. Each term has a default **Term Holiday**. If required, select a different holiday from the drop-down list or manually enter a new holiday name.

3. Repeat this process for all the terms displayed, specifying the applicable holiday for each term.

Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

4. When the school terms, term start and end dates, and term holidays have been defined, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays*.

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

From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview panel.

Defining Half Term Holidays

Term holidays are created automatically for the dates in between the term dates entered. For example, if the Autumn term ends on 20/12/2024 and the Spring term starts on the 06/01/2025, then it is assumed that the dates in between are holidays, e.g. Christmas Holiday. However, the dates for half-term holidays need to be entered manually.

Category	Start Date	End Date	Description
----------	------------	----------	-------------

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

☐ Preview...

1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.
2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.

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4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.

The screenshot shows the 'Create Academic Year' window with the 'Define the half term holidays' section active. A modal dialog titled 'Half Term Holiday Details' is open, containing the following fields:

Field	Value
Category	Half-Term
Start Date	21/10/2024
End Date	01/11/2024
Description	Autumn Half Term

Buttons at the bottom of the dialog include 'OK' and 'Cancel'. The background window shows a table with columns for Category, Start Date, End Date, and Description, and a 'No errors detected. Press 'N'...' message.

5. Click the **OK** button to add the half-term holiday.
6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.

The screenshot shows the 'Create Academic Year' window with the 'Define the half term holidays' section. The table below lists the defined holidays:

Category	Start Date	End Date	Description
Half-Term	21/10/2024	01/11/2024	Autumn Half Term
Half-Term	17/02/2025	21/02/2025	Spring Half Term
Half-Term	26/05/2025	30/05/2025	Summer Half Term

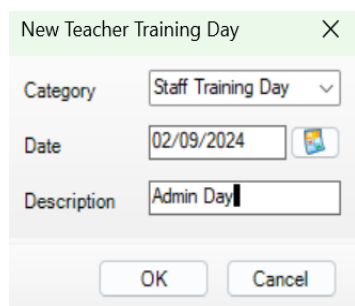
Buttons at the bottom include 'Add Holiday...', 'Remove', 'Preview...', '< Back', 'Next >', and 'Cancel'. A message at the bottom states 'No errors detected. Press 'Next' to continue...'.

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

Defining Teacher Training Days

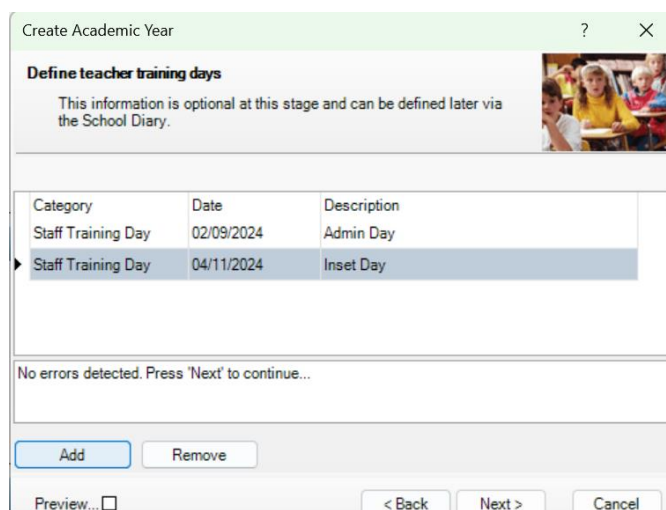
The **Define teacher training days** page is used to enter any training days where pupils will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).

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



The dialog box titled "New Teacher Training Day" has a close button (X) in the top right corner. It contains three input fields: "Category" with a dropdown menu showing "Staff Training Day", "Date" with a text box containing "02/09/2024" and a calendar icon, and "Description" with a text box containing "Admin Day". At the bottom are "OK" and "Cancel" buttons.

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



The "Create Academic Year" window shows the "Define teacher training days" section. It includes a note: "This information is optional at this stage and can be defined later via the School Diary." Below this is a table with the following data:

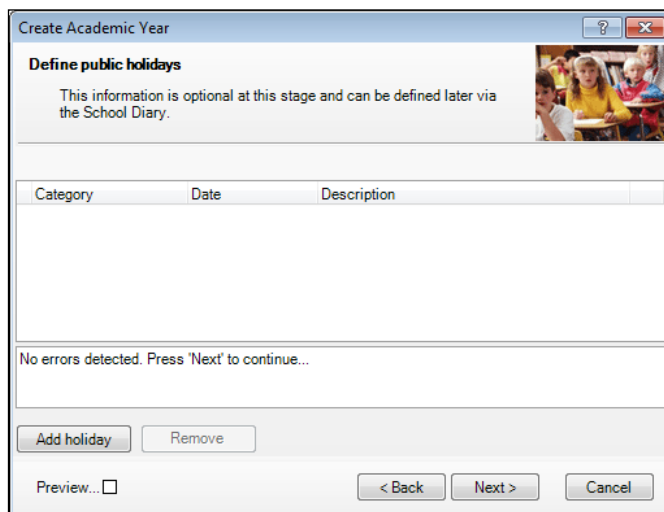
Category	Date	Description
Staff Training Day	02/09/2024	Admin Day
Staff Training Day	04/11/2024	Inset Day

Below the table, it says "No errors detected. Press 'Next' to continue...". At the bottom are "Add" and "Remove" buttons, a "Preview..." checkbox, and "< Back", "Next >", and "Cancel" buttons.

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

Defining Public Holidays

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



Create Academic Year

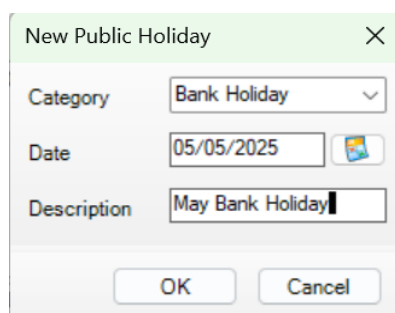
Define public holidays

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

Category	Date	Description
----------	------	-------------

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

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



New Public Holiday

Category: Bank Holiday

Date: 05/05/2025

Description: May Bank Holiday

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

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

Create Academic Year

Define public holidays

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

Category	Date	Description
Bank Holiday	05/05/2025	May Bank Holiday

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

Add holiday Remove

Preview... ☐ < Back Next > Cancel

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

Creating the New Academic Year

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

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

Create Academic Year

Ready to create new academic year

Check the new academic year dates below and press create when you are ready. This process will take some time to complete and should not be aborted once started.

- Academic Year 2024/2025
 - Autumn Term 02/09/2024-20/12/2024
 - Christmas Holiday 21/12/2024-05/01/2025
 - Spring Term 06/01/2025-04/04/2025
 - Easter Holiday 05/04/2025-21/04/2025
 - Summer Term 22/04/2025-29/07/2025
 - Summer Holiday 30/07/2025-01/09/2025

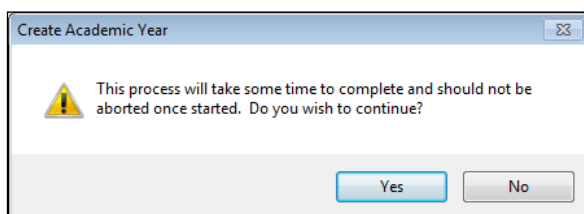
< Back Create Cancel

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

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

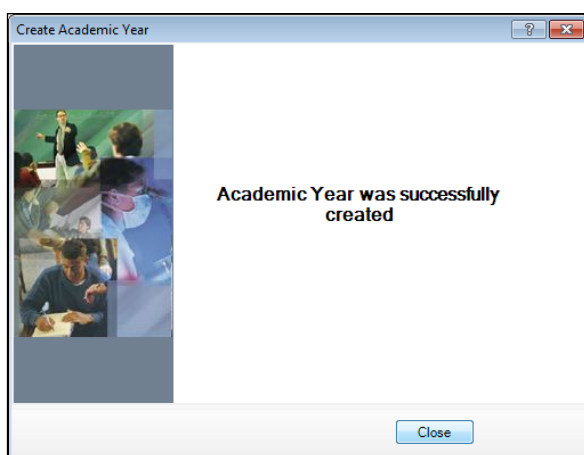
The following warning message is displayed:



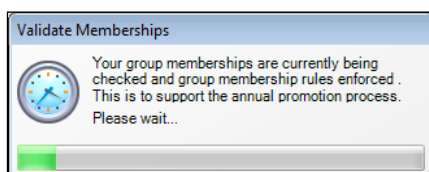
Progress is displayed via a progress indicator at the bottom of the wizard.



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



2. Click the **Close** button to close the wizard and complete the process.
3. It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools | Validate Memberships**, which displays the following page.



 **Completed**

Setting up the New Academic Year's Pastoral Structure

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

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

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

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

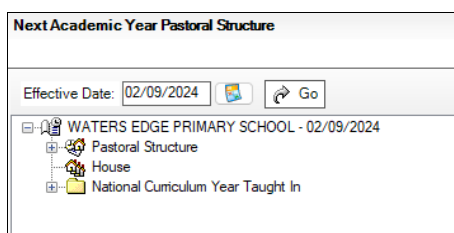
If you want teachers to be promoted with their pupils in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year on page 29).

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups on page 20).

Opening the Structure of the New Academic Year

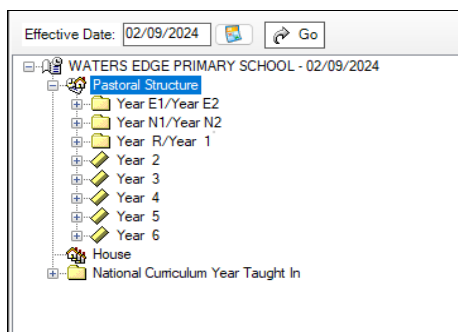
1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

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



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



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

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

Adding Classes (Registration Groups)

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

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

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page 15).
2. Expand the year group to which you wish to add the class by clicking the adjacent **+** icon.

- Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.

The 'Class' dialog box is shown with the following fields and values:

- Short Name: Rowan
- Full Name: Rowan
- Registration Tutor: Mrs Pauline Brown
- Supervisors: A table with columns 'Role' and 'Name'.
- Room: (empty)

Buttons: Ok, Cancel

- Enter a **Short Name** and **Full Name** for the new class.
The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. Rowan. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.
- Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.

The 'Select person' dialog box is shown with the following details:

- Search fields: Surname, Forename, Role (dropdown set to '<Any Suitable>')
- Name list:
 - Avery, Mrs Helen (highlighted)
 - Bates, Miss Belinda
 - Boston, Mrs Sarah
 - Boswell, Mrs Jennifer
 - Brooks, Mr Carl
 - Brown, Mrs Charmaine
 - Brown, Mrs Pauline
 - Brown, Mrs Susan
 - Cable, Mrs Freda
 - Chard, Mrs Vicky
- Buttons: OK, Cancel
- Status bar: Records found: 37

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



New button

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

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

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

Completed

Important Note on Editing Class Names

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

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

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

Please see the following two examples:

Example:

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

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

To correctly change a class name:

1. Add a new class in the next academic year pastoral structure labelled with the new class name (e.g. **4AW**).
2. Delete the old class, **in the next academic year pastoral structure**, by right-clicking the required class name and selecting **Remove** from the pop-up menu.
3. Click the **Save** button to save the changes.

General Advice

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

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

Changing Year Group Horizontal/Vertical Structures

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

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

Changing from a Vertical to a Horizontal Structure

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

Changing from a Horizontal to a Vertical Structure

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

If you need to change the class structure of your school as described above, please contact the Service Desk on 0115 9772010, option 1.

Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of three separate admission groups might be set up for your nursery pupils starting on three separate dates at the beginning of term.

IMPORTANT NOTE: Please ensure that the **Date of Admission** lies within the new academic year.
If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.

This is also a good time to delete or make inactive any unwanted admission groups.

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

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2022/2023 - Autumn Year N2	2022/2023	Autumn	Year N2	20	Active
2022/2023 - Autumn Year R	2022/2023	Autumn	Year R	40	Active

2. Carry out a search to ensure that the intake group does not already exist.
3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different if you have set up SIMS to only allow single admission groups to be added.

1 Intake Group

Admission Year: 2023/2024 (highlighted in red)

Admission Season: (highlighted in red)

Year Group: (highlighted in red)

Planned Admission: (highlighted in red)

Name: (highlighted in red)

Active: ☒

2 Admission Groups

Name	Date Of Admission

New Open Delete

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

Intake Group Details

Save Undo Print

1 Intake Group 2 Admission Groups

1 Intake Group

Admission Year: 2024/2025 Name: 2024/2025 - Autumn Year R

Admission Season: Autumn Active: ☒

Year Group: Year R

Planned Admission: 30

2 Admission Groups

Name	Date Of Admission
Daisy	03/09/2024
Rose	04/09/2024

New Open Delete

6. Select the required **Year Group** from the drop-down list.
7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
8. If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year**, **Admission Season** and **Year Group**, e.g. **2024/2025 – Autumn Year R**. The default name can be amended, if required.
9. The **Active** check box is selected by default and indicates that the intake group is available for use.

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. (If the second panel is labelled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labelled **Admission Group**, SIMS is not set up to allow multiple admission groups).

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

SIMS Add Admission Group ? X

Admission Group

Name: Poppy

Date Of Admission: 05/09/2024

OK Cancel




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

IMPORTANT NOTE: Please ensure that the **Date Of Admission** falls within the applicable academic year. We recommend that the date of admission is the first day of the academic year. However, if you are unsure please check with your Local Authority for advice on the correct date to use.

3. Click the **OK** button to add the admission group and return to the **Intake Group Details** page.
4. If any further admission groups are required, click the **New** button in the **Admission Groups** panel and repeat steps 2 and 3.
5. Click the **Save** button to create the intake and admission groups.

2 Admission Groups

Name	Date Of Admission
Daisy	03/09/2024
Rose	04/09/2024
Poppy	05/09/2024

 New
 Open
 Delete

(The screenshot above shows staggered admissions for nursery groups).

Once admission groups have been created, you can manually add applicants to SIMS and assign them to the required admission group, using menu route **Focus|Admission|Application** and selecting **New** from the top left.

Panel **2 Registration Details** will allow you to select the required **Intake Group** and current **Application Status**.

☐ **Completed**

Importing Admissions and Transfer Files (ATF)

If your Local Authority has provided you with an ATF file, this can be used to populate admission groups. (A guidance document is available from the Schools Portal: [SIMS Admissions | NCC Schools Portal \(nottinghamshire.gov.uk\)](https://www.nottinghamshire.gov.uk/schools-portal)). Any additional pupils can be imported via CTF, as described in the following section, or added manually via Focus | Admission | Application.

Importing Common Transfer Files (CTFs)

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

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

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

Appropriate intake/admission groups must be created before you can import CTF files (please see *Adding Intake/Admission Groups* on page 20).

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

Select the CTF import type..

Import Type

- General
- Add Data for New Pupils Only
- Add Data for Existing Pupils Only
- Add KS1 for Existing Pupils Only
- Add KS2 for Existing Pupils Only
- Add Phonics Data for Existing Pupils Only
- Add FSP data for Existing Pupils Only

Select Cancel

2. Highlight the required CTF import type.

Import CTF (General)

1 Data to be Imported 2 Import Selection 3 Exception Log

1 Data to be Imported

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

2 Import Selection

CTF File

Place new pupils in Effective Date

Pre-Admission Group	Admit On	Year Group
Daisy	03/09/2024	Year R
Rose	04/09/2024	Year R
Poppy	05/09/2024	Year R

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

Completed

Checking Dates for Part-Time Pupils

To ensure that pupils who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day. This is mostly relevant to Nursery schools (or schools with nursery age children). However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week.

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

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

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

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

 **Completed**

Recording Leavers

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

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

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

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

*To avoid validation failures when a statutory return is run, it is advisable to choose a **Date of Leaving** that is not a holiday or staff training day, i.e. a day when the pupil(s) can attend school.*

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

1. Select **Routines | Pupil | Leavers** to display the **Find Student(s)** browser.
2. Search for the required pupil, then double-click their name to display the **Manage Student(s) Leaving Details** page.
3. If you wish to assign a group of pupils as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required pupils using any of the following methods:
 - To select all the pupils displayed in the browser, select **All** from the **Select** drop-down menu.
 - To select a group of pupils, highlight them using any of the following methods:
 - Hold down the **Ctrl** key and click each pupil to be selected.
 - To highlight sequentially listed pupils, click the first name in the list, hold down the Shift key, then click the last name in the list.
 - Once the required pupils have been highlighted, click the **Select** button to add them to the **Students** panel.

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

Manage Pupil(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving: 26/07/2024 Reason for leaving: se transfer - Maintained school Assign to All

Destination after Leaving: Assign to Selected

Destination Institution:

Destination Expected Start Date: Grounds for Removal:

2 Students

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution
ABHRA, ALISA	6	6VC	001337	01/09/2013			Green Abbe...	Green Abbey
Adams, Sadie	6	6KH	001521	01/09/2016				
Alyona, Tatyana	6	6KH	001522	01/09/2016				
Andrews, Richard	6	6KH	001523	01/09/2016				
Bartram, Piers	6	6VC	001602	01/09/2017				
Bennet, Eloise	6	6KH	001603	26/04/2021				
Bronislaw, Tomaz	6	6KH	001524	01/09/2016				
Brooks, Madison	6	6VC	001604	01/09/2017				
Clarke, Harriette	6	6KH	001525	01/09/2016				
Clint, William	6	6VC	001605	01/09/2017				
Cummins, Jake	6	6VC	001606	01/09/2017				

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

 **Completed**

Exporting Common Transfer Files (CTFs)

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

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

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

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

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

Highlight the required CTF export type, then click the **Select** button to display the **Export CTF** page.

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

2. Select the status of the pupils you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.

3. If you have already created a CTF file for some of the pupils but wish to include them in this CTF, select the check box to include pupils already exported in the export file.

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

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
G823299915001	Adams	Nancy	6VC	6	6	Abbots Ripton Primary School		
V823299915002	Alata	Candice	6KH	6	6			
L823299916021	Barden	Olivia	6VC	6	6			
H823299916022	Bateman	Vincent	6KH	6	6			
X823299916023	Bhati	Aini	6VC	6	6			
L823299916024	Boian	Claudia	6KH	6	6			
A823299916025	Brown	Ingrid	6VC	6	6			
K823299916033	Broz	Konrad	6KH	6	6			
P823299916036	Cainne	Matthew	6VC	6	6			
D823299916027	Canzano	Michael	6KH	6	6			
Z823299916004	Carlton	Eleanor	6VC	6	6			
T823299916028	Carter	Tom	6VC	6	6			

- Select the **Destination School** by clicking in the appropriate cell, then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupils as follows:
 - Hold down the **Ctrl** key and click each pupil to be selected.
 - To highlight sequentially listed pupils, click the first name in the list, hold down the **Shift** key, then click the last name in the list.
 - To select all the pupils, right-click anywhere in the table, then click **Select All** from the pop-up menu.

UPN	Preferred Surna...	Preferred Forena...	Re...	Yea...	Year T...	Previous Destination	Destination LA/Other...	Destination School
P823299911021	Akeman	Rebecca	6VC	6	6	Green Abbey		
D823299911022	Arkell	Irene	6VC	6	6	Green Abbey		
T823299911023	Astoni	Sonya	6VC	6	6	Green Abbey		
J823200110061	Astwick	Wills	6VC	6	6	Green Abbey		
G823299911024	Baker	Fiona	6VC	6	6	Green Abbey		
V823299911025	Barrett	Anthony	6VC	6	6	Green Abbey		
K823299911026	Bassett	Joseph	6KH	6	6	Green Abbey		
Z823299911027	Benson	Zachary	6VC	6	6	Green Abbey		
Y823200110062	Candy	Tilly	6KH	6	6	Green Abbey		
M823200110063	Ching	Susie	6VC	6	6	Green Abbey		
N823299911028	Clarke	Anabel	6VC	6	6	Green Abbey		
B823200110064	Clover	Frederick	6KH	6	6	Green Abbey		

- Click the **Export CTF** button to create the export file.
After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupils in the file, the number processed and the number not exported.
Any errors must be corrected before the pupil can be successfully included in the CTF export file.
- Navigate to the location of the **CTF Export Directory** (as defined in **Tools | Setups | CTF**), then identify the newly created XML file for export. The CTF can be transferred The CTF can be transferred in the usual way via S2S.

 **Completed**

Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupils in case there are any exceptions.

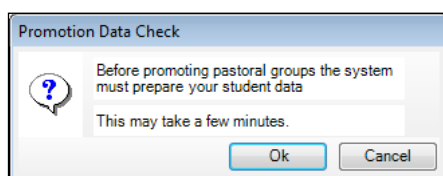
Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

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

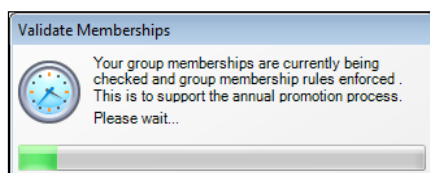
BEFORE PROCEEDING: Please check that you have carried out the following:

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

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



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



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

The screenshot shows the 'Setup Promotion Mapping' dialog box. It has a title bar with a question mark and a close button. The main content is divided into three sections: 'Academic Year', 'Year Group', and 'Class'. The 'Academic Year' section has a 'Promote from' dropdown menu showing 'Academic Year 2023/2024' and a 'Load' button. The 'Year Group' section has a table with two columns: 'Year Group' and 'Promotion Path'. Below the table is an 'Override membership' checkbox and a 'Set Default' button. The 'Class' section has a table with six columns: 'Year', 'Registration Group', 'Promotion Path', 'Supervisor', 'Promote Registration Tutor', and 'Promote Other Supervisors'. Below the table is another 'Override membership' checkbox. At the bottom right is a 'Finish' button.

Academic Year	
Promote from	Academic Year 2023/2024

Load

Year Group	
Year Group	Promotion Path

Override membership ☐ Set Default

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

Override membership ☐ Finish

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

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

4. The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on). This is the same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.
5. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column and then selecting the required year from the drop-down list.

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

Setup Promotion Mapping from Academic Year 2023/2024

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

Year Group

Year Group	Promotion Path
Year E1	
Year E2	
N1	
N2	R
R	1

Override membership ☐ Set Default

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year E1/Ye...	Acorns		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1/Ye...	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N1/Ye...	AM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	ELM	2JB	Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	PINE	2GH	Mr Oliver Joyner	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Yea...	ASH	2JB	Miss Amelia Kent	<input type="checkbox"/>	<input type="checkbox"/>

Override membership ☐ Finish

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

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N2	PM		Ms Lisa Lawson	<input type="checkbox"/>	<input type="checkbox"/>
Year N2	AM		Mrs Rebecca Lorrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Year 1	ELM	2JB	Mr Richard Perrin	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Year 1	PINE	2GH	Mr Oliver Joyner	<input type="checkbox"/>	<input type="checkbox"/>
Year R/Year 1	ASH	2JB	Miss Amelia Kent	<input type="checkbox"/>	<input type="checkbox"/>

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

- Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column, then select the class to which the pupil will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.
- The **Registration Tutor** column displays the name of the current class tutor. If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.

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8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.

9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process.

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

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

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

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

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: Year E2					
+ Current Year Group: N1					
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
+ Current Year Group: 2					
+ Current Year Group: 3					
+ Current Year Group: 4					
+ Current Year Group: 5					
+ Current Year Group: 6					

Viewing/Setting the Promotion Path for Individual Pupils

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

+ Current Year Group: Year E2						
+ Current Year Group: N1						
- Current Year Group: N2						
Blue, Benny	<input type="checkbox"/>	N2	R	AM		
Jones, Aled	<input type="checkbox"/>	N2	R	AM		
Pink, Penny	<input type="checkbox"/>	N2	R	PM		
- Current Year Group: R						
Beinon, Rhys	<input type="checkbox"/>	R	1	ELM	ELM	
Bronislaw, Natalia	<input type="checkbox"/>	R	1	PINE	PINE	
Cooper, James	<input checked="" type="checkbox"/>	R	1	ASH	ASH	
Delanve, Tanisha	<input type="checkbox"/>	R	1	OAK	ASH	Short Name
Dylan, Cai	<input type="checkbox"/>	R	1	ASH	ELM	
Faizan, Maaz	<input type="checkbox"/>	R	1	PINE	PINE	
Foster, Thomas	<input type="checkbox"/>	R	1	ELM	OAK	
Ghalen, Jayden	<input type="checkbox"/>	R	1	ELM	x	
Ghulam, Aadila	<input type="checkbox"/>	R	1	PINE	PINE	

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

Sort

Sort students by

Name

☒ Ascending
 ☐ Descending

Then by

Current Year Group

☒ Ascending
 ☐ Descending

Then by

(none)

☒ Ascending
 ☐ Descending

Then by

(none)

☐ Ascending
 ☐ Descending

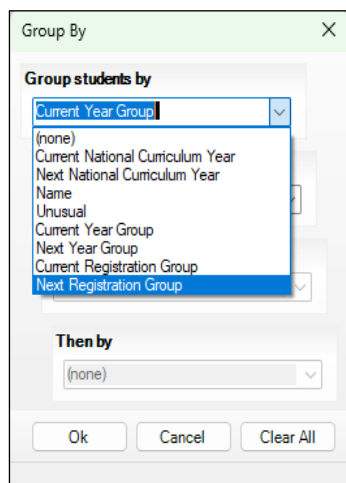
Ok

Cancel

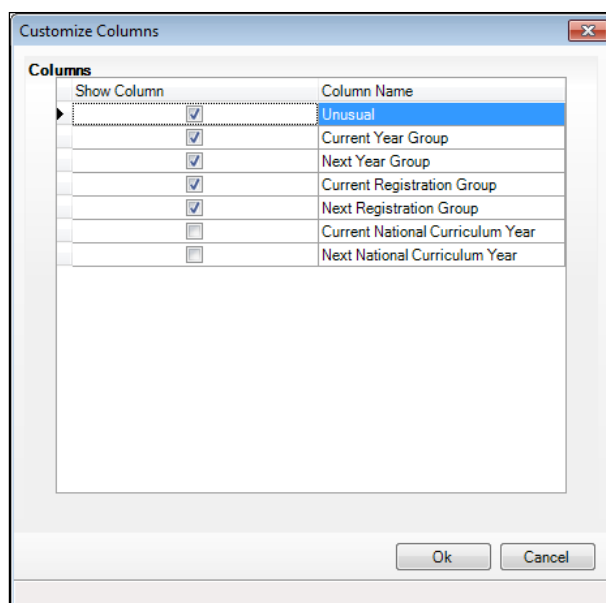
Clear All

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



- Select **Columns** to display the **Customize Columns** dialog, which enables you to choose the columns you wish to include in the display. (It is useful to include the Current/Next National Curriculum Year columns should you have any pupils taught out of year group).



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

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

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

Adams, Laura		2	3	2JB	3TO
Amnar, Tarak		2	3	2JB	3TO
Astwick, Gwenneth		2	3	2JB	3TO
Bond, Steve		2	3	2JB	3TO
Cameron, Zara		2	3	2GH	3CB
Carter, Hannah		2	3	2JB	3TO
Churchill, Martin		2	3	2JB	3TO
Cookson, Harry		2	3	2JB	3TO
Cosenza, Isabella		2	3	2JB	3TO
Defeo, Lorenzo		2	3	2JB	3TO
Dennis, Tommy		2	3	2GH	3CB
Dixon, Stephanie		2	3	2JB	3TO

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

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

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

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

Completed

Checking the Registration Tutors Assigned

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

- Select **Focus | School | Pastoral Structure | Next Academic Year Structure**.

2. Click the **+** icon adjacent to **Pastoral Structure** to reveal each registration group.
3. Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.
4. If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for and then selecting the required person. Click the **OK** button.
5. If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** table. Select the **Role** of **Joint Main Supervisor** from the drop-down list, then select the required person by clicking the **Browser** button, then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection.
6. Click the **OK** button to return to the pastoral structure, then click the **Save** button once you have assigned all the required registration tutors.



Changing the Status of Applications to Offered or Accepted

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

It is also possible to change the application status of individual applicants on their individual Applicant record.

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

Finalising Offers

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

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

The screenshot shows the 'Find Intake Group' window. At the top, there are icons for New, Search, Open, Delete, Print, Browse, Next, and Previous. Below these are search filters: Name (text input), Admission Season (dropdown menu set to '<Any>'), Status (dropdown menu set to 'Active'), Admission Year (dropdown menu set to '<Any>'), and Year Group (dropdown menu set to '<Any>'). Below the filters is a table with the following data:

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2023/2024 - Autumn Year N2	2023/2024	Autumn	Year N2	30	Active
2023/2024 - Autumn Year R	2023/2024	Autumn	Year R	30	Active

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

The screenshot shows the 'Finalise Offers - 2024/2025 - Autumn Year R' window. It has tabs for '1 Summary' and '2 Applications'. The '1 Summary' tab is active and displays the following data:

Planned Admission	Offered	Total Applicants	Accepted	Applied	Withdrawn	Admitted	Rejected
30	0	4	0	4	0	0	0

The '2 Applications' tab is also visible and shows a table of applicants:

Late	Name	Gender	DOB	App Status	Applied	Offered	Rejected
	Barlow, Gary	Male	01/01/2020	Applied	✓		
	Boop, Betty	Female	25/01/2020	Applied	✓		
	Orange, Jason	Male	01/01/2020	Applied	✓		
	Williams, Robert	Male	10/01/2020	Applied	✓		

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

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

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

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- To change the application status, click the required cell for each applicant, as shown in the following graphic.

Accepting Applicants

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

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

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

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

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

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

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

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

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

 **Completed**

Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

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



Application icon

- changed the applicant's application status (please see *Changing the Status of Applications to Offered or Accepted* on page 36) to **Offered** or **Accepted**.
1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

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The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used so that information can be edited.

2. Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.
3. Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

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

Allocate Students/Applicants : Year N2

Effective Date Range

☒ From effective date to end of the academic year (☐ Over the whole academic year (04/09/2023 - 02/09/2024)

Student Status

☒ Students ☒ Accepted Applications ☒ Current Applications (Applied / Offered / Reserved)

Members

Print Actions

Name	Gender	Year Group	Reg Group	PM	AM
Abhra, Abjit	Male	Year N2	AM		✓
Abhra, Alisha	Female	Year N2	PM	✓	
Abhra, Neel	Male	Year N2	PM	✓	
Ackton, Stan	Male	Year N2	AM		✓
Beiber, Justin	Male	Year N2	AM		✓
Berkley, Jack	Male	Year N2	PM	✓	
Del Sonno, Nadia	Female	Year N2	AM		✓
DiCalvi, Pasquale	Male	Year N2	AM		✓
DiMichele, Sara	Female	Year N2	PM	✓	
Ebi, Danesh	Male	Year N2	PM	✓	
Enlai, Cheng	Male	Year N2	PM	✓	
Total				10	10

OK Cancel

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

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

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

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

It can be useful to change the view to **View Triple**, which displays a breakdown of totals for females and males in each group.

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

☐ Completed

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

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

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

If these reports do not exist on your system, you need to import the latest pre-defined reports. Please contact the Service Desk for assistance.

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

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

The screenshot shows a dialog box titled "Enter parameter values for report". It contains the following elements:

- Supply Effective date:** A text field containing "02/09/2024" and a calendar icon to its right.
- Bypass effective date (Use Today):** An unchecked checkbox.
- Select Year Group(s):** A section with "Select All" and "Clear All" buttons, a "Show All" checkbox, and a list box containing "Year E1", "Year E2", "Year N1", "Year N2", and "Year R".
- Accept All (bypass filter condition):** An unchecked checkbox.
- Select Registration Group(s):** A section with "Select All" and "Clear All" buttons, a "Show All" checkbox, and a list box containing "Acorns", "PM", "AM", "ELM", and "PINE".
- Accept All (bypass filter condition):** An unchecked checkbox.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

3. Deselect the **Bypass effective date** check box.
4. Enter the required date or click the **Calendar** button and select the required date.
5. Select the required **Year Group(s)** and **Registration Group(s)**, then click the **OK** button to produce the required report.

Registration Groups (Dated) Report

Registration Groups (Dated)		
Registration Groups (Dated)		
Year group is Year 3 and Reg group is 3CB		
Registration Group: 3CB		
Tutor:	Mrs G Grosvenor	
Room:	n/a	
Effective date:	02/09/2024	
Name	Gender	Date of Birth
Ackton Simon	M	12-12-2016
Andrews Meili	F	19-05-2017
Andrews Melissa	F	07-10-2016
Bhandari Firoz	M	04-04-2017
Bordet Petra	F	20-05-2017
Cartwright Oliver	M	07-05-2017
Chern Chynna	F	02-02-2017
Chidiadi Igbo	M	23-03-2017
Clarke Courtney	F	10-07-2017
Deri Aeron	M	02-01-2017
Dwight Elizabeth	F	16-01-2017
Elis William	M	21-07-2017
Emery Kathryn	F	28-02-2017
Folant Ellis	M	10-10-2016
Haf Mati	F	14-03-2017
Harper Jessica	F	02-11-2016
Harries Alfie	M	22-02-2017
Hendersby Collette	F	30-09-2016
Jameson Eve	F	12-04-2017
Kabacinski Alicija	F	20-06-2017
Luminata Gabriela	F	02-03-2017
Maciej Iza	F	26-11-2016
Mhera Nina	F	28-06-2017
Morris Sophie	F	22-09-2016
Muir Aviden	M	15-01-2017
Reid Jennifer	F	20-11-2016
Richmonds Carl	M	02-05-2017
Siriol Lili	F	18-11-2016
Vidhya Lekha	F	14-10-2016
Wallace Emma	F	13-07-2017
Watson Alivs	F	25-06-2017
Wilsons Jack	M	07-03-2017
Wisniewski Jozef	M	07-09-2016
Yasin Kati	F	24-08-2017
Yates Izaak	M	15-02-2017
Total: Males	13	
Total: Females	22	
Group Total:	35	

Registration Group (Dated – DOB Sort)

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

Registration Group (Dated – Gender Sort)

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

Registration Group (Dated – With Columns)

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

☒ Completed

02 | Processes to be Carried Out in Other SIMS Modules

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In SIMS Attendance - Entering Reasons for Absence Last Year

Select **Focus | Attendance | Deal with Unexplained Absences**, then select the required date and **Group Type**. Click the **Search** button to display the selected group(s).

Short Name	Description	Group Type
Whole School Selected		

Highlight the required group(s) and click **Open** to display any relevant **N** codes for pupils (No reason yet provided for absence). Update marks, as required. Use menu route **Focus | Attendance | Deal with Missing Marks** and follow same process to identify any missing marks.

☐ Completed

Dinner Money

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

- It is advisable to reconcile pupil and staff balances, issue refunds or collect debts (where possible) before the end of term, particularly for any pupils or staff who are leaving the school.

- Any meal price changes should ideally be entered at the start of the academic year, as additional processing will be necessary to remove recorded meals and add price changes retrospectively. These can be entered via **Tools | Dinner Money | Pupil Meal Definitions/Staff Meal Definitions/Adhoc Meal Definitions** and/or **Other Sales Definitions**.
- Print the final catering return on the last day of term.
- Where appropriate, send the debt and credit reports (produced via **Reports | Dinner Money | Finance | Pupil Balances** or **Staff Balances**) to the caterers.
- Prior to the start of the new catering year, a new catering year should be created via **Tools | Dinner Money | Setup**, corresponding to the start of the new catering year.

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

The catering year may not correspond with the academic year.

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

Meal Charges Mapping

Tools | Dinner Money | Setup

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

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

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

To prevent this issue occurring, you must either:

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

- Give all current meal charges an end date in the existing meal definitions, e.g. 25/08/2024. Enter new meal definitions, with meal charges having a start date of, e.g. 03/09/2024 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

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

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 25/08/2024. Enter a new meal definitions, with meal charges having a start date of, e.g. 03/09/2024 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

After the New Academic Year has Started

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

- In SIMS, admit applicants (please see *Admitting Applicants* on page 47).
- In SIMS, record any re-admission pupils (please see *Re-Admitting Pupils* on page 49).
- In Attendance, print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page 50).
- In Attendance, use the Part-Time Pupils routine to add Not Required codes (please see *In SIMS Attendance - Using the Part-Time Pupils Routine to Add Not Required Codes* on page 51).

Admitting Applicants

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

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

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

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.
2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

02 | Processes to be Carried Out in Other SIMS Modules

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

1 Summary

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

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

The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name, Gender, Date of Birth, proposed Date of Admission, Enrolment Status, Application Status, UPN** and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

2 Applications

Application Status: **Accepted** Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Atkins, Eve	Female	28/07/2019	05/09/2022	Single Registration	Accepted		No Change		
Birkett, Scott	Male	03/03/2019	05/09/2022	Single Registration	Accepted		No Change		
Cardale, Luke	Male	17/05/2019	05/09/2022	Single Registration	Accepted		No Change		
Carmichael, Meghan	Female	21/06/2019	05/09/2022	Single Registration	Accepted		No Change		
Ciobanu, Mirica	Male	23/09/2018	05/09/2022	Single Registration	Accepted		No Change		
Clifton, Rhianna	Female	25/04/2019	05/09/2022	Single Registration	Accepted		No Change		
Dickinson, Adam	Male	05/12/2018	05/09/2022	Single Registration	Accepted		No Change		
Henson, Tameka	Female	22/01/2019	05/09/2022	Single Registration	Accepted		No Change		

- If you wish to admit applicants with a different application status (such as **Offered**), select it from the **Application Status** drop-down list, then follow the remainder of this process.
- If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN**.
- To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**.

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

IMPORTANT NOTE: UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you need to allocate UPNs on an individual basis via the **Pupil Details** page. Any known existing UPNs can be entered in the **Basic Details** panel by clicking the **Application** icon on the toolbar or by selecting **Focus | Admission | Applicant**.



Application icon

- If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Barlow, Gary	Male	01/01/2020	04/09/2024	Single Registration	Admitted		No Change	✓	
Boop, Betty	Female	25/01/2020	05/09/2024	Single Registration	Admitted		No Change	✓	
Orange, Jason	Male	01/01/2020	05/09/2024	Single Registration	Admitted		No Change	✓	

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

Completed

Re-Admitting Pupils

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

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

IMPORTANT NOTES:

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

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

1. Select **Focus | Pupil | Pupil Details** to display the **Pupil Details** page.
2. Click the **New** button to display the **Add Student** page.
3. Enter the pupil's known details into the **Basic Details** panel, then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
4. Highlight the required pupil and click the **Open** button to display a warning message **The selected pupil is a Leaver, do you want to re-admit the Pupil?**
5. If you are certain that this is the pupil who should be re-admitted, click the **Yes** button to display the pupil's details.
6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil's details.
7. Click the **Save** button again if any additional data has been added.

☐ Completed

In SIMS Attendance - Printing the Official Register for July

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

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the **Official Register Report** page.
2. Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.

☐ Completed

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

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

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

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

Part Time Pupils

Search Preserve Apply

From w/b 02/09/2024 to w/b 16/12/2024 Group Type Part Time Group

Short Name	Description
AM	AM only
PM	PM only

Select All Deselect All

Enter 'Not Required' codes

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

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

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

4. Specify when attendance is required by selecting one of the radio buttons.

Enter 'Not Required' codes

☒ Attendance required in mornings only
 ☐ Attendance required all day

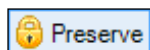
☐ Attendance required in afternoons only
 ☐ Apply a weekly pattern of Not Required codes

- Attendance required in mornings only
- Attendance required in afternoons only
- Attendance required all day
Select this option when a part-time pupil starts full-time school. All 'Not Required' codes for the pupil are removed from the system.
- Apply a weekly pattern of Not Required codes
Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupils are not required to attend school.

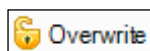
In the following example, the pupils are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day on Wednesday.

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

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



Preserve toggle button



Overwrite toggle button

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

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

Running Housekeeping Routines in SIMS

Now is a good time to carry out some general housekeeping routines in SIMS. For more information, please refer to the *Setting Up and Administering SIMS* handbook, available via the Documentation button on the top right of the SIMS home page.

Adding/Removing Users from SIMS Online Services Products

Applicable to users of SIMS Online Services products only (e.g. SIMS Parent)

Users of SIMS Online Services can be managed on the **Manage Users** page of Product Admin (<https://admin.sims.co.uk>).

It is recommended that the following actions are taken over the summer holidays or early in the academic year:

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

NOTE: Invitations are valid for 90 days from the date they are sent out. Parents of pupils who are accepted applicants are able to register to use SIMS Online Services. However, they are not able to access Data Collection functionality until their child is on roll.

When a pupil or staff member is marked as a leaver in SIMS the information cascades automatically through the system and updates SIMS Online Services products ensuring the leaver is unregistered.

Parents can be unregistered via SIMS ID only.

For more information, please refer to the **Help Centre** via the **SIMS Parent for Schools** Documentation Centre (https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0036841).

Teachers who are new to your school should have their devices set up so they can use the SIMS Teacher app. You are strongly advised to revoke permissions to the SIMS Teacher app for teachers who have left your school. For more information, please refer to the *SIMS Teacher app Administrator Guide* (https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0036037).