

ATF Import

&

Applicant Housekeeping in SIMS

Summer Term 2025

Working in Partnership with











Where appropriate for data entry purposes, the graphics used in this document match the training data recommended for use on the course. Where the graphic is an example of what might be expected when using certain areas of the software, the training data may not be an exact match.

Revision History

Version	Change Description	Date
Version 1	Buckinghamshire Council ICT Schools Team	April 2021
Version 2	Updated for 2022/23 intake groups.	April 2022
Version 3	Updated for 2023/24 intake groups.	April 2023
Version 4	Updated for 2024/2025 intake groups	March 2024
Version 5	Updated for 2025/2026 intake groups	March 2025

This booklet is designed for use with SIMS software version 7.222 and above

ATF Import and Applicant Housekeeping in SIMS Contents

Chapter 1	Admissions Routines	
	s Permissions	
	d Information	
	ups	
	Group(s)	
	dmission Group Set Up	
	e or Multiple Admission Groups	
•	s Transfer Files (ATF) & Common Transfer Files (CTF)	
	ng Applicants	
Import	Contacts	
	te Applicants	
	ng New Intake Students Between Intake Groups	
Chapter 2	Applicant Data Housekeeping Reports	11
	Missing UPN	
	- Contacts with PR	
	- Contact Addresses	
	- Applicants with On Roll Siblings	
Annondiy A	Applicant Housekeening Report Evamples	12

Chapter 1 Admissions Routines

Admissions Permissions

Permissions necessary to address these procedures should be set up using System Manager.

The relevant permissions are found under the Admissions heading:

- admissions
- admissions common data (general access)
- applications (student data)
- interviews and visits (OAA arrangements)
- enquiries (OAA arrangements)
- setups (general defaults)
- routines (procedures including OAA).

The range of permissions is extensive as it equates to managing the same range of data as for on-roll students. Many of the process permissions relate to the extended routines available for own admissions authority (OAA) schools, who are responsible for conducting a wider range of procedures. Permissions specifically relating to interviews, visits and enquiries can be ignored for schools whose admissions procedures fall under their LA arrangements.

Groups with admissions permissions are:

Admissions Officer	The admissions officer has access to all the preceding areas.
Pastoral Manager	This group has access to view data in admissions – common data, a range of data in applications and to view and edit registration data in applications.
SEN Co-ordinator	This group has access to view data in admissions – common data, a range of data in applications and to view and edit medical and welfare data in applications.
Senior Management Team	This group has access to view data in admissions – common data and all data in applications and enquiries. There is no access to edit any data.
Assessment Co-ordinator, Curricular Manager	This group has access to view admissions – common data and applications and cannot make any other adjustments.

Background Information

Following the co-ordinated admissions process conducted by the LA, the school will receive details of the students who will join their intake year. This data will usually be in either an ATF (admissions transfer file) or a CTF (common transfer file). Both files contain basic information about the students, including addresses and contacts. A CTF may contain additional data relating to attendance and assessment. It is possible that the data may be submitted in another format which cannot be accessed by SIMS and this will require manual entry of the student details.

In all cases a new intake and associated pre-admission group(s) will be set up by selecting

Routines | Admission | Admission Groups | Setup.

Student details can then be:

- added manually by selecting Focus | Admission | Application
- imported from an ATF by selecting Routines | Admission | Import ATF File
- imported from a CTF by selecting **Routines | Data In | CTF | Import CTF**.

Importing an ATF offers the most efficient method as it requires no data entry by the school. Once imported, the details can be edited.

A further ATF may be received, updating the data already in the database. It should be remembered that importing this file may overwrite any changes already made in the database.

A CTF may be received or several CTFs may become available directly from the feeder schools. A CTF will not overwrite any existing data but will add data where fields are currently blank. Any basic data received via CTF can be imported and edited, but any further imports will not overwrite the existing data.

NOTE: It is possible to import a CTF using the Match and Import Panel.

This enhanced functionality is available via a licence patch.

When importing a CTF, you will be prompted to select the CTF import type from General, Add Students Only, Add Data for Existing Students Only or Add ULNs for Existing Students Only.

The admission status of the student is determined by the method of entry.

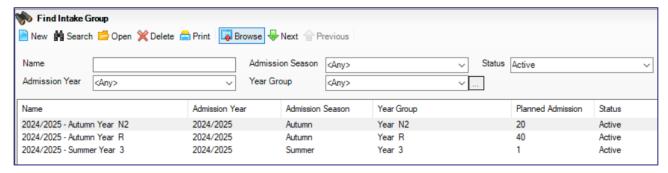
Imported students from an **ATF** have the status of **Offered.** The status will progress to Accepted and Admitted.

Manually entered students and students imported from a **CTF** have the status of **Applied.** This may progress to Offered, Accepted and Admitted as the admission process proceeds.

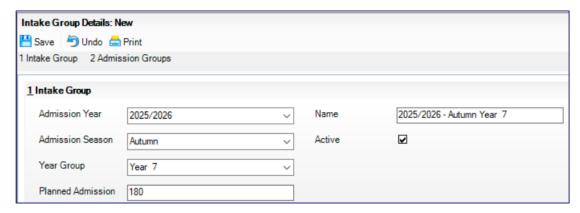
Intake Groups

Intake Groups must be created for the relevant Academic Year before Admission Groups can be set up.

- 1. Select Routines | Admission | Admission Groups | Setup to display the Find Intake Group browser.
- 2. Select **Search** to ensure the intake group you are creating does not already exist.



- 3. Click **New** to display the **Intake Group Details** page.
- 4. Panel 1: Intake Group, complete the mandatory fields highlighted in red, example below.



- 5. **Admission Year** select academic year to which the intake group relates eg. **2025/2026**. This defaults to the new academic year
- 6. Admission Season select Autumn, Spring or Summer.

If the intake group does not apply to a specific season, select Integrated from the drop-down list.

- 7. Year Group select from the drop-down list.
- 8. Planned Admission enter the number of applicants expected to be admitted to this intake group.
- 9. If you press the **Tab** key, it moves 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**,
 - eg. 2025/2026 Autumn Year 7 (The default name can be amended, if required).

NOTE: It is advisable to adopt and adhere to a naming convention for intake groups as it will affect the order the groups are presented in lists.

10. The Active check box is selected by default and indicates the intake group is available for use.

Deselect the check box only if you want to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Admission Group(s)

If Panel 2 is labelled **Admission Group**, SIMS is not set up to allow multiple admission groups.

If Panel 2 is labelled **Admission Groups**, SIMS is set up to **allow multiple admission groups**.

One Admission Group Set Up

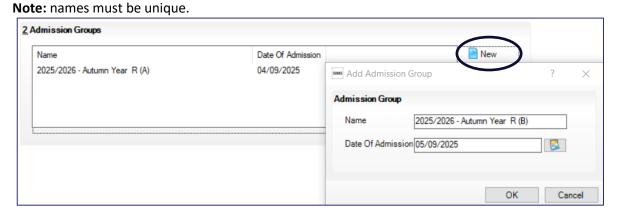
1. From the Admission Groups panel, click New to display the Add Admission Group dialog.



- 2. Enter a **Name** for the admission group.
- 3. Enter the **Date of Admission** or alternatively, click the **Calendar** and select the required date.
- 4. Click **OK** to add the admission group and return to the **Intake Group Details** page.
- 5. Click **Save** to create the Intake and Admission groups.

Multiple Admission Group Set Up

- 1. Follow steps 1 to 4 above to add one admission group.
- 2. If further admission groups are required, click **New** to add further Admission Groups.



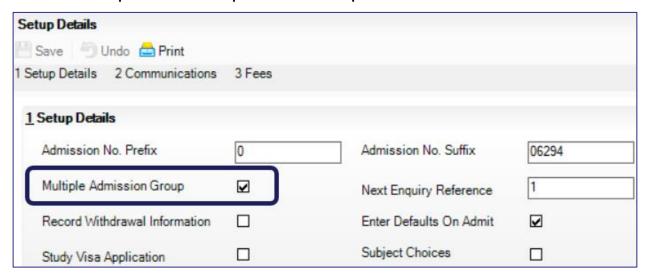
3. Select OK and Save.

Once admission groups have been created, applicants can be added to SIMS and be assigned to the required admission group.

Set up One or Multiple Admission Groups

If the school has staggered start dates for Reception or EYFS pupils, SIMS can be set up to allow the use of multiple admission groups.

- 1. Tools | Admissions | Defaults.
- 2. Panel 1: Set up Details tick Multiple Admission Groups.



Admissions Transfer Files (ATF) & Common Transfer Files (CTF)

An ATF file with details of your end of phase transition applicants is available from Buckinghamshire Council's Admission Portal. Email the admissions team for further information.

Secondary Schools will be able to download their ATF from the Buckinghamshire Council Admissions Portal. Primary Schools will have to contact the Admissions Team to arrange a date to receive the ATF.

Any additional students can be imported via CTF or added to the Admission Group manually.

NOTE: We are aware of the following issues with the 2025 ATF Imports:

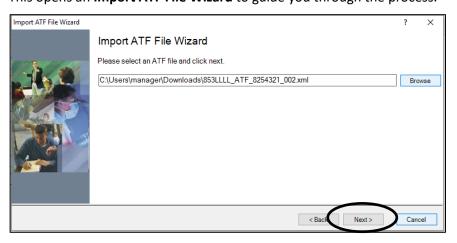
For Primary Schools, where a pupil with an EHCP, has your school named on their annual review, this has been entered by Buckinghamshire Council's SEN Team with a future start date of **01/09/2025**. This is transferring via the ATF, into the pupil's school history in SIMS.

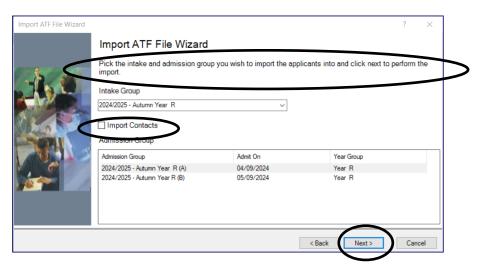
This <u>must be</u> removed from Panel 11: School History in the admission record, otherwise, when the pupil is admitted, the admission date will automatically populate as 01/09/2025 and <u>not</u> the date specified in your Admission Group.

Pupil Telephone Numbers - Contact 1's telephone number are importing into **Panel 4** of the pupil's record due to a mapping issue on the ONE System and should be removed. This will happen even if you deselect "import contacts".

All pupils contained in the ATF file will be imported; there is no option to exclude importing specific pupils.

- We advise you set up the pre-admission group and import your ATF **before** you manually add applicants. This will ensure you have the correct information and format.
- If you have already manually added applicants to your pre-admission group, you must give them a status of **Applied**, to ensure the information held in the ATF will match with existing applications.
- An ATF will not match with the status of Accepted or Withdrawn.
- To import an ATF: Routines | Admission | Import ATF File
- This opens an Import ATF File Wizard to guide you through the process.





- There is an option to **Import Contacts** and you can choose whether or not to import them.
- If you choose to import contacts, ensure you follow the guidance below regarding "matching contacts".

Matching Applicants

- If an applicant in the ATF is a match for an existing applicant, select the New Application check box.
 This will update the existing application and will add the ARN (Applicant's Reference Number) to their current record.
- If an applicant in the ATF is a completely **new applicant** and not the same as the individual found by SIMS, select the **New Person** check box to record a new person and a new application.

Note: Schools with On-Site Nurseries:

Section 27 Nursery schools who have **N2** pupils as **Accepted Pre-admissions** for the 2024/25 Academic Year (to enable electronic registration):

Pupils contained within the 2025/26 ATF, <u>should not</u> match with an existing 2024/25 applicant record and a duplicate pupil applicant record in 2025/26 will be created.

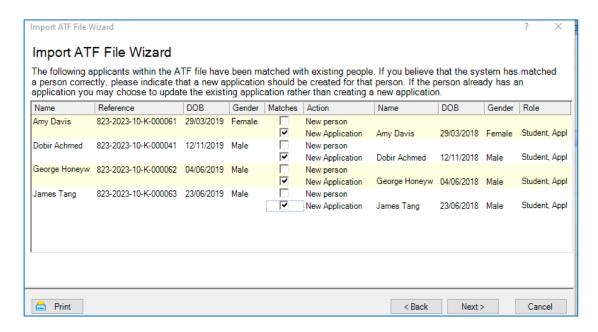
This enables attendance to continue to be taken until the end of the 2024/25 Academic Year.

DO NOT change their Admission Group to prevent loss of attendance data before the end of term.

Non-Section 27 Nursery Schools who have N2 pupils listed as on-roll for the Academic Year 2024/25:

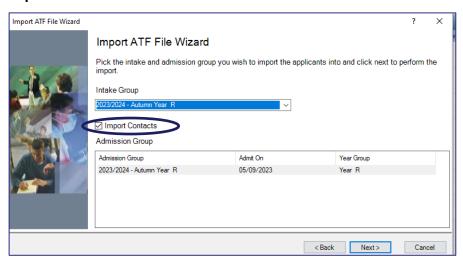
If these pupils show in the matched screen, ensure **both ticks** are **removed** and then manually remove these pupils from the 2025/26 admission group to remove duplicates.

These pupils will be promoted from N2 to Year R.



Warnings may be given where duplicate pupils or duplicate contacts are imported. You are asked whether a contact in the file should be matched with an existing person in your database or whether they are a new person. A checkbox is available against each option and appropriate selection should be made. The default may be to create a new person. Consider the implications of the warnings.

Import Contacts



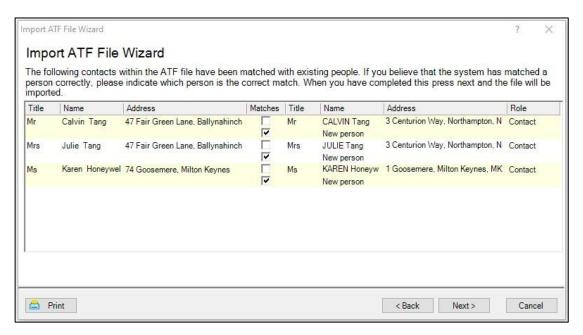
SIMS also checks for **Contact matches** with any applicant in the incoming ATF who shares a contact that is already present in the system.

- Select the "Matches" checkbox adjacent to the correct **Name**, if any of the contacts listed on the wizard prove to be a **match** for an **Existing Contact**.
- Select the "Matches" checkbox adjacent to the **New Person** record in the **Name** column, if any of the contacts listed on the following page of the wizard prove to be a **New Contact**,

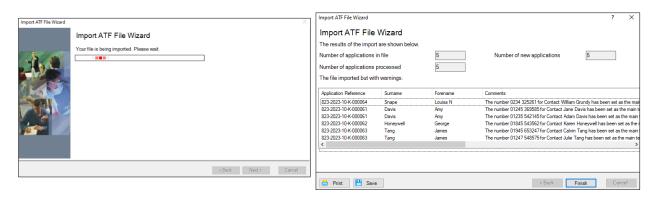
The Admissions Transfer File will contain only one contact per applicant as it is generated directly from the admissions module off the ONE system which can only be completed by one person.

Care must be taken to match the contacts with existing records in SIMS where possible or duplicate records will be created.

Family Links will have to be made manually in SIMS.



- 1. Select **Next** and the data will be imported.
- 2. A summary of the imported data is displayed and can be printed or saved.



- 3. Click **Finish** to complete the process.
- 4. Click **Yes** to confirm the closure of the wizard.
- The pupil details will now be visible and may be edited by selecting Focus | Admission | Application.
- Select the Intake Group filter to the group created and click Search.
- Matches may have been made with existing pupils in the school's database, who may have left the school.
- If you have any problems with the applicants which have been added to the Pre-Admission group, contact the ICT Schools team 01296 383500 #1.

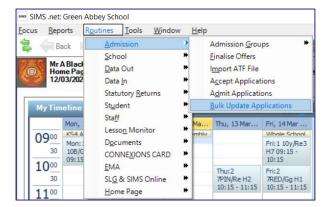
Applicants will be available to view and update in Focus / Admission / Applicants.



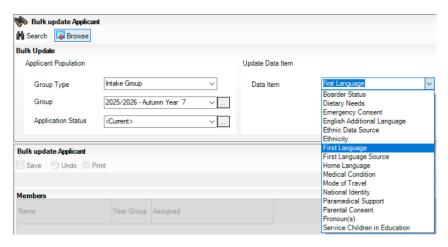
Bulk Update Applicants

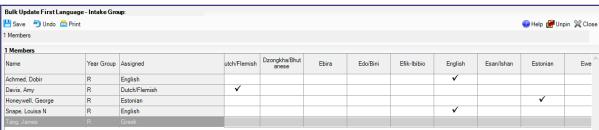
Using the Bulk Update Applicants module allows the updated of all your applicants with the following:

- Border Status
- English Additional Language
- Ethnic Data Source
- Ethnicity
- First Language
- Home Language
- Parental consent
- Pronoun(s)



- 1. Select Routines | Admissions | Bulk Update Applicants
- 2. Select the **Group** you wish to update.
- 3. Select the **Data Item** you wish to update.
- 4. Click **Search** to see Applicants to update records.





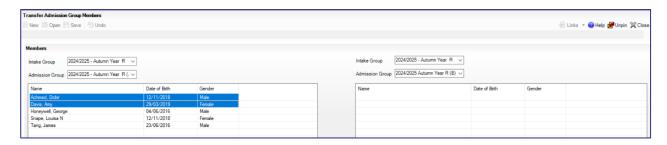
5. Once completed click Save and each applicant record will be updated according.

Guidance for the End of Year processes will be provided in the 2024/25 End of Year guidance notes and supporting seminar. To book your place, use the https://bookwhen.com/bxq3n

Transferring New Intake Students Between Intake Groups

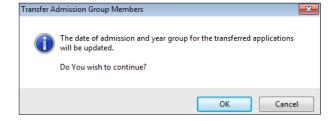
It is possible to move students from one intake or admission group to another. For example, if you have imported your ATF including all Reception pupils but operate a pre-agreed "staggered start" for this cohort.

- 1. Select Routines | Admission | Admission Groups | Transfer Applications.
- 2. Select the appropriate intake group in the left-hand browser and in the right-hand browser.
- 3. Select all pupils who should be moved into a different admission group in the left-hand browser and click the **right-pointing** arrow to move them to the right-hand browser.





- Click Save and observe the message regarding admission groups.
- 5. Click OK.



- 6. You can check this by returning to the **Focus | Admission | Application**.
- 7. Change the **Intake Group** filter to the required group and click **Search**.
- 8. **Close** the applicant screen.

Chapter 2 Applicant Data Housekeeping Reports

Once the ATF is imported, we recommend running the **Applicant Data Cleansing Reports.** These are available to download then import into SIMS from:

SchoolsWeb | ICT Zone | SIMS Downloads | 4. End of Year and Pre-admissions

https://schoolsweb.buckinghamshire.gov.uk/ict-zone/schools-mis-team/sims-downloads/

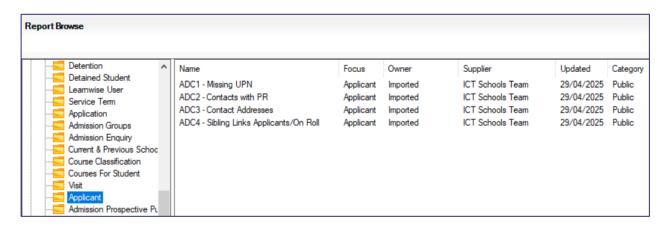
Wherever possible, data issues should be resolved prior to admission as the pupils/students in preadmissions will be included in the twice weekly transfer from your SIMS database to the Local Authority ONE system. Once applicants are admitted, any discrepancies will increase the number of queries you received from this team.

These reports are designed to interrogate your Applicant records and highlight inconsistencies with data held in the applicant area where contacts may already exist in SIMS when applicants have on roll siblings.

These reports can be filtered by Admission/Intake Group and Application Status at runtime and can be run multiple times.

You are encouraged to run them again once you have imported your CTFs as these will populate additional information in the applicant records.

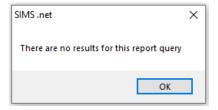
Reports | Run Reports | + Focus | Applicant



ADC1 – Missing UPN

There is a small but significant number of pupils/students who apply for entry to Buckinghamshire schools from outside the county. As these pupils/students do not yet have a record in the Local Authority ONE system, no UPN can be included in the ATF.

If all pupils/students in your ATF have a UPN recorded the report will return the following message when run:



Once you have run this report, **save** the output with a filename in the following format: "825XXXX – Missing UPNs" (where XXXX is replaced by your school DfE number)

You should then make your best efforts to contact the feeder schools to request Common Transfer Files which, when imported, will update the applicant records with a UPN in addition to other key pieces of information.

To check UPN for pupils/students, enter the details on DfE Get Information about Pupils

https://services.signin.education.gov.uk/

If no UPN has been found for a pupil/student, you should allocate one at the point of admission on the first day of the Autumn term.

NOTE: Most Infant Phase entry pupils will not yet have been allocated a UPN therefore this report is likely to be of most use to school processing ATFs for **Junior** and **Secondary Phase** transfers.

ADC 2 - Contacts with PR

This report provides a count of contacts that have the **Parental Responsibility** indicator ticked in their contact record. As the ATF only contains one contact per pupil/student you would expect this to be 1 initially, but as you record additional information from admissions forms or by importing Common Transfer Files you may find it useful to run this report again to ensure data consistency.

ADC 3 - Contact Addresses

This report shows pupils/students along with an address line, the name and address line of any contacts, and a column that states whether or not the contact lives with the pupil/student. If the address lines appear to match but the Live with Pupil column shows F, then it is likely that you have a duplicate address in your database.

If a contact is showing without an address, it is either that they have no address recorded in their contact record or the "address can be transferred" / "address can be disclosed" tick boxes are no selected. Check the contact records and amend as appropriate.

ADC 4 – Applicants with On Roll Siblings

This report shows applicants with their on-roll siblings. If the Family Links are not correct, then the information in this report will not be accurate.

If you are expecting siblings to be joining your roll based on information provided on the admission form and this report does not contain any results, then there is likely to be a duplicate contact record.

If the students are showing as siblings but Same Address is showing F then there is likely a duplicate address in your database.

Appendix A Applicant Housekeeping Report Examples

ADC1 - Missing UPN					
Location	Focus A	Focus Applicant			
Description		Reports pupils/students in selected intake group without a UPN.			
	If all pupils/students have a UPN the following message will be displayed:				
Run-Time Parameters	Intake Group, Application Status				
Sort Order	Surname, Forename (of Applicant)				
Output Type	Excel				
Example					
Legal Surname and Foren	ame UP	N	Date of Birth	Application Status	Intake Group Name
Gamble, Edward			10 October 2006	Applied	2021/2022 - Autumn Year 10

ADC2 - Contact	s with P	rR								
Location Focus Applicant										
Description			Reports pup	Reports pupils/students in selected intake group with a count of contacts with						
			Parental Re	sponsibility an	d a count of co	ntacts without F	Parental Resp	onsibi	lity.	
			Names of co	ntacts also re	ported.					
Run-Time Parai	Run-Time Parameters Intake Group, Application Status									
Sort Order			Surname, Forename (of Applicant)							
Output Type			Excel							
Example										
Legal Surname and Forename	UPN	Date of Birth	Application Status	Intake Group Name	Num Contacts with Par Resp	Num Contacts without Par Resp	Full Name	Relationship	Parental Responsibility	
Gamble, Edward		10 October 20	06 Applied	2021/2022 - Autumn Year 1	0					
Heyes, Georgia	N823432119002	01 January 20	07 Applied	2021/2022 - Autumn Year 1			Dr Natalie Heyes	Mother	T	
	N823432119002			2021/2022 - Autumn Year 1			Mr Jamie Heyes	Father	T	
	C823432119003			2021/2022 - Autumn Year 1	•		Miss Treena Henderso	womer	T	
	Z823432119001			2021/2022 - Autumn Year 1	-	i	Mrs Jacqueline Heyes		T	
Heyes, Christopher	Z823432119001	10 November	2006 Accepted	2021/2022 - Autumn Year 1	(2	i	Mr Robert Heyes	Father	T	

ADC3 - Contact	Address	es						
Location			Focus Applicant					
Description		Reports pupils/students in selected intake group with their address line, report contacts address line. If "Lives with Student" is F and the address lines match,						
			then there is a duplicate address in your SIMS database, and this should be resolved prior to admission.					
Run-Time Parameters			Intake Group, Application Status					
Sort Order			Surname, Forename (of Applicant)					
Output Type			Excel					
Example								
Legal Surname and Forename	UPN	Date of Birth	Home Address Line	Full Name	Relationship	Lives with Pupil	Address line	
Heyes, Christopher	Z823432119001	10 November 2006	15 Lower Coxs Close, Cranfield, MK43 0DT	Mrs Jacqueline Heyes	Mother	T	15 Lower Coxs Close, Cranfield, United Kingdom,	
Heyes, Christopher	Z823432119001 10 November 2006		15 Lower Coxs Close, Cranfield, MK43 0DT	Mr Robert Heyes	Father	T	15 Lower Coxs Close, Cranfield, United Kingdom,	
Heyes, Georgia	N82343211900201 January 2007		24 Cheriton, Furzton, Milton Keynes, MK4 1BT	Dr Natalie Heyes	Mother	F	24 Cheriton, Furzton, Milton Keynes, United King	
Heyes, Georgia	N823432119002	01 January 2007	24 Cheriton, Furzton, Milton Keynes, MK4 1BT	Mr Jamie Heyes	Father	F	24 Cheriton, Furzton, Milton Keynes, United King	
Heyes, Joseph	C823432119003	31 August 2007	Flat 8 Roedean Court 82b Kimbolton Road, Bedford, MK40 2PS	Miss Treena Henderson	Mother	T	Flat 8 Roedean Court 82b Kimbolton Road, Bedfo	

ADC4 - Applicants with On Roll Siblings			
Location Focus Application			
Description	Reports applicants in pre-admissions with linked on roll siblings		
Run-Time Parameters	Intake Group, Application Status		
Sort Order	Surname, Forename (of Applicant)		
Output Type	Excel		

ATF Import & Applicant Housekeeping in SIMS