



COLLECT Guidance for Schools

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COLLECT Access

- 1) First ensure that you have an account in your name for DfE Sign in. DfE Sign-in is a portal that is used to access several different systems maintained by the DfE. All schools have someone who is responsible for maintaining all the DfE sign-in accounts for the school. This person is called the Approver. This could be anyone nominated by the Headteacher. It's a good idea to have more than one Approver just in case the person leaves the school's employment as it would have to be the DfE that set up the new account and they can take some time to do so.
- 2) Next, make sure that your account gives you access to the COLLECT system and that your access includes all three term's School Census and / or the School Workforce Census. COLLECT is used for several different collections, not just the pupil and workforce Censuses so your Approver will need to give you access to any returns you will be responsible for individually.
- 3) DfE Sign-in accounts should not be shared between staff members and should be for individuals only. As DfE Sign-in is used for several different systems, staff members may need access to some systems that not all colleagues should be able to access. In COLLECT, manual changes to returns are monitored and it is essential for data security that the individual who made the changes can be identified.

Opening COLLECT

- 1) First open DfE Sign-in and click on the green button

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

DfE Sign-in

DfE Sign-in is how schools and other education organisations access DfE online services.

To access your DfE online services, you'll either need:

- **an existing DfE Sign-in account.** This will be the email address and password you created when you first accessed DfE Sign-in.
- **to create a DfE Sign-in account.** If you haven't used DfE Sign-in before you'll need to [create a DfE Sign-in account](#).

Start now >

► [Services accessed using DfE Sign-in](#)

If you are inactive for 20 minutes, your session will timeout.

- 2) Enter your email address and password then click on the green button

Department for Education Sign-in

Sign-in to access DfE online services.

Email address

Password

Show

[Forgotten your password?](#)

By signing in you accept our [terms and conditions](#).

Sign in

Create account

► [Services accessed using DfE Sign-in](#)

If you are inactive for 20 minutes, your session will timeout.

- 3) The next screen will show a link to all the DfE Sign-in services you have access to.
Click on 'COLLECT'

My services

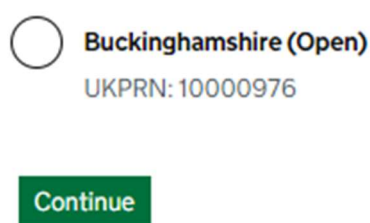
Here you can access services associated with your account.

Related actions

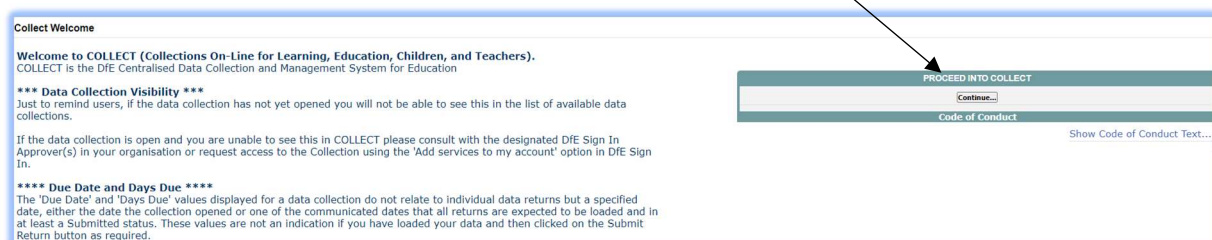
- [Add services to my account](#)
- [Edit services on my account](#)
- [Remove service from my account](#)
- [See approvers at an organisation](#)
- [Help with services](#)

Service	Description
Analyse school performance	Analyse school performance (ASP) is a secure system where DfE users, schools, academies, MATs, LAs, Dioceses, Ofsted and governors can access detailed performance data to help support school improvement.
Collect	COLLECT (Collections Online: Learners, Education, Children and Teachers) allows users to see and submit data collections and censuses to the Department for Education.
Document exchange	Use Document Exchange to submit documents to the Education and Skills Funding Agency (ESFA) and to view and download documents published by the ESFA.
Get Information About Schools	Access information on establishments, local authorities, trusts, federations and governors, and update your organisation's details.

- 4) On the following screen, click in the circle next to the name of the school you wish to use an account for, then click on 'Continue' at the bottom of the screen. If your school has recently become an Academy or changed DfE number, ensure you open the account that says (Open) next to it



- 5) You'll now be transferred to COLLECT, but to access it you need to first confirm you wish to open COLLECT by clicking on 'Continue'

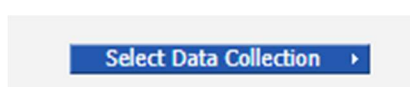


Then click on the collection you wish to access

MY DATA COLLECTIONS			
Data Collection	User Role	Organisation	Status
SchoolCensus 2022_Autumn	Agent	Buckinghamshire	Open
SchoolCensus 2023_Spring	Agent	Buckinghamshire	Familiarisation
SchoolWorkforceCensus2022	Agent	Buckinghamshire	Open

Before Census day the DfE always have a familiarisation version of the site for schools to upload test files to see if any issues occur. This test site usually closes the friday before census day at 4pm and all data is removed. Each collection will then not be available until census day and returns cannot be uploaded until the status says 'Open'.

When you have selected the return you need, click on 'Select data Collection'.



Uploading your return

- 6) The first time you open a data collection your screen should look like this and say 'No_Data' at the top

Source Page SchoolCensus 2023_Spring

The status of your data return :

Errors :

What can I do with My Data Return?

Upload Return from file...	Press this button to Import a file into your data return
Add Return on screen...	Press this button to Add a new return using a web form
Open Return...	Press this button to Open your data return
Submit Return...	Press this button to Submit your completed data return
Export to file...	Press this button to Export your data return to a file
Launch Reports...	Press this button to Report on your data return
Delete Return...	Press this button to Delete your data return

- 7) To upload your return, click on the 'Upload Return from File' button

Press this button to Import a file into your data return

You'll be asked to choose a file to upload, so click on 'Choose File', navigate to the folder containing your census file, then click on 'Upload'.

No file chosen

Make sure you select the .XML file when uploading your final return after census day. An unauthorised file could be uploaded to the test system.

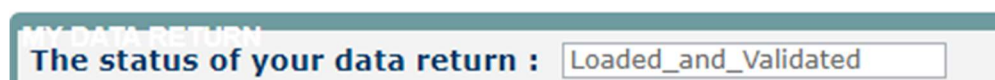
- 8) When your return has been uploaded, this screen will appear. Click on OK to continue.

Source UpLoad In Progress

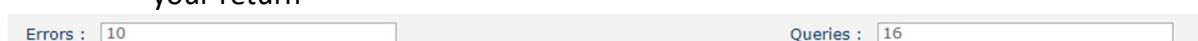
Source UpLoad In Progress

Your data return has been successfully loaded and is queued for validation. Please return later to view any validation errors identified and Submit your Return.

- 9) Back on the source page, you can carry on dealing with your return when COLLECT says it has been 'Loaded and Validated'. When you first upload your return it may say 'validation in progress'. After a few seconds you can refresh your screen and eventually it will change to 'Loaded and Validated'. During busy times or if you have a large school, the validation may take longer so you may need to come back to your return later to continue.



- 10) Under the status box, you can see if there are any issues the DfE have flagged on your return



Please note that just because you may not have had any queries in school when you authorise your return, the DfE have additional validation on COLLECT so you may have other issues to resolve before you can submit your return. If you have a '0' in both of these boxes and therefore have no errors or queries, please go to step 18.

Checking for errors or queries

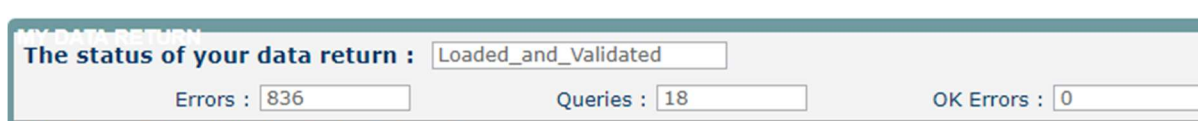
Any errors or queries will need to be resolved or explained before your return can be authorised by the DfE. There are a few ways to find out how many issues are remaining and what those are.

When your return has been uploaded and validated, you can see straight away how many issues are left on your return without having to open it. Above the upload return button there is a status section. This will say whether your return is either –

- No Data
- Loaded and Validated
- Submitted
- Approved
- Authorised

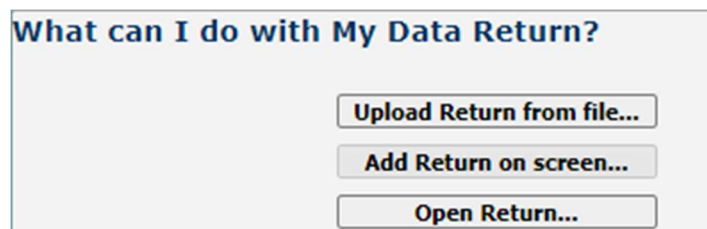
The three boxes underneath will let you know how many errors or queries COLLECT has found on your return. Usually errors will need to be resolved before your return can be authorised and queries will need a note recorded. The 'OK Errors' box will show how many errors / queries have been accepted by the DfE as a result of the note(s) added.

Source Page SchoolCensus 2024_Spring

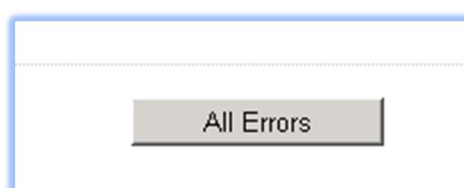


In order to see what the errors or queries are, there are two ways to find out -

11) Click on the 'Open Return' button



Then 'All Errors' which can be found towards the top of the screen in the middle.



12) You will then see a list of the queries and errors the DfE have flagged about your return. The number of issues can be seen in the top right corner

The screenshot shows a table with the following columns: Rule No., Return Level, Error Message, Priority, OK'd, Details, and Notes. The table contains 10 rows of data. In the top right corner, there is a "Count 26" label. An arrow points from the text "The number of issues can be seen in the top right corner" to the "Count 26" label. Another arrow points from the text "Only 10 issues will show on each screen..." to the "Rule No." column header.

Rule No.	Return Level	Error Message	Priority	OK'd	Details	Notes
130		DfE number and phase are not consistent	Errors		Details	
2485Q		Pupil attendance indicates they are excluded but no exclusion is recorded.	Queries		Details	
2485Q		Pupil attendance indicates they are excluded but no exclusion is recorded.	Queries		Details	
2385		The UKPRN has been provided, AP Setting Type is not required	Errors		Details	
2385		The UKPRN entered does not relate to any known UKPRN on GIAS open between Oct 6 2022 12:00AM and Jan 18 2023 12:00AM	Errors		Details	
1990Q		Please check: Pupil is in receipt of top-up funding but is not classed as having an EHC Plan?	Queries		Details	
2355Q		Please Check: Pupil record with no address details	Queries		Details	
5235		2-year-old basis for funding is missing or an invalid value for a 2 year old with funded hours	Errors		Details	
2455Q		Please Check: Pupil record with no address details	Queries		Details	
5235		2-year-old basis for funding is missing or an invalid value for a 2 year old with funded hours	Errors		Details	

Page 1 of 3

Only 10 issues will show on each screen, so you may need to move between pages to see them all.

You may have several of the same kind of issue, so you can click on the 'Rule No.' link in the top left and the issues will be sorted by query number.

- 13) Some queries may be about specific pupils. You can find out who it relates to by clicking on the 'Details' button next to the query.

Rolls No.	Return Level	Error Message	Priority	OK'd	Details	Count	Notes	Field	Value
1000	Y	Pupil with UPN missing	Errors		Details	26		MissingAddress	Null
130		Pupil reconciliation does not match number of Pupils on Roll (SCHOOL - Part Time Not In = 11...; CLASSES - Total of Home Pupils = 439; PUPILS - Total Number of Pupils = 448; Total Number of Pupils with Enrolment Status of C, M or S = 448)	Errors		Details				
1741Q		DfE number and phase are not consistent	Errors		Details				
1877Q	Y	Based on Ministry of Defence criteria, Service Children (parents designated as personnel category 1 or 2) are not eligible for Free School Meals	Queries		Details				
1990Q		Please Check: Take up of school lunches for pupils in reception, year 1 and year 2 (plus pupils aged 4 to 6 in year X) greater than 95%. Please confirm more than 95% of infant pupils took a school lunch on census day	Queries		Details				
2100Q	Y	Please check: Pupil is in receipt of top-up funding but is not classed as having an EHC Plan?	Queries		Details				
2340		Please check: More FT nursery pupils on roll than number on nursery class records	Queries		Details				
2340		Postcode is missing or provided in an invalid format	Errors		Details				
2350Q		Postcode is missing or provided in an invalid format	Errors		Details				
2350Q		Please Check: Pupil record with no address details	Queries		Details				

Information about the query will show to the right and you can then click on one of the relevant links to be taken to the relevant field in the child's record.

- 14) There may be some issues that have to be resolved in your MIS and a new return uploaded. In the situation above, a new pupil doesn't have an address recorded at all, so this would need to be added to their records in your MIS with a start date before census day and a new return uploaded. In this situation, go back to step 7 and follow the instructions in the same way. You will receive this message, but you can just click on 'Yes'.

Delete Existing Return Confirmation

Data Return already exists do you wish to overwrite it?

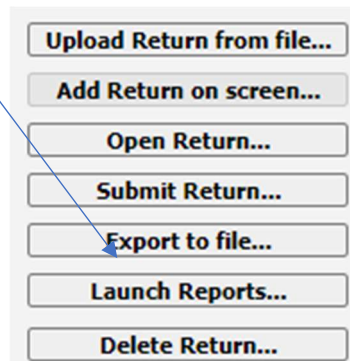
Please note that replacing a Data Return will delete all notes other than return-level notes. If you wish to preserve any data-item or validation error level notes you must enter them as return-level notes before re-submitting this Data Return.

Yes No

Please note - Any errors recorded on COLLECT that can be corrected in your MIS should be cleared before you are ready to carry on to the next step. The DfE will not Authorise your return with any errors that can be cleared. You can upload a new return as many times as you need to. Please contact Amy Mitchell for assistance in clearing any errors on COLLECT in the first instance (schoolcensus@buckinghamshire.gov.uk or 01296 382887), not your MIS support provider.

Alternatively, to find details about the errors and queries on your return, you can run the 'School Error Report' to see what issues are remaining on COLLECT.

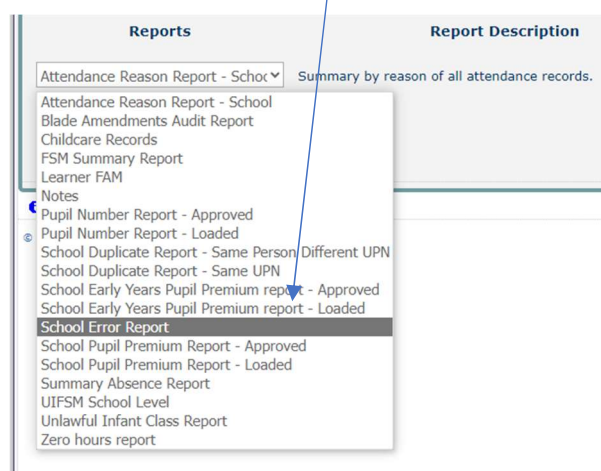
Click on 'Launch Reports'



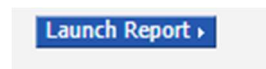
Click on the down arrow to see a full list of reports that are available



Scroll down until you see 'School Error Report'



Then click on Launch report



And launch report again

Report Parameter Selection

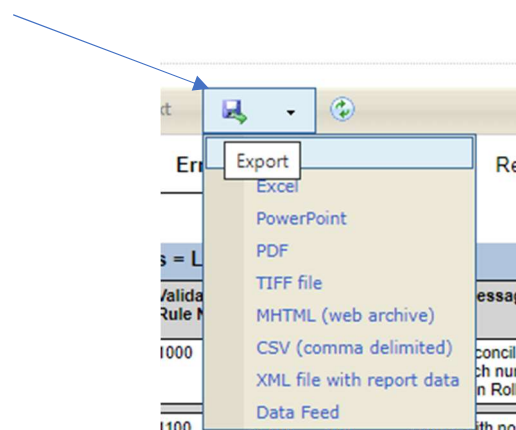
	Launch Report

1

You will then see a list of all issues on your return on COLLECT. Please note that you cannot see the pupil's full name on this list so you may need to follow the previous instructions to determine exactly which pupil the issue relates to.

UPN	Surname	DOB	NC Year Actual	Validation Rule No.	Error/Query	Error Okayed	Error Message	Table Name
				1000	Error	No	Pupil reconciliation does not match number of Pupils on Roll	
				1100	Error	No	Class with no staff	Classes
				1100	Error	No	Class with no staff	Classes
				1100	Error	No	Class with no staff	School
				1100	Error	No	Class with no staff	Classes
				1100	Error	No	Class with no staff	Classes
				1100	Error	No	Class with no staff	School
				1110Q	Query	No	Please check: no	

This list can be exported from COLLECT into several different programmes for ease of use by clicking on the 'Export' button.

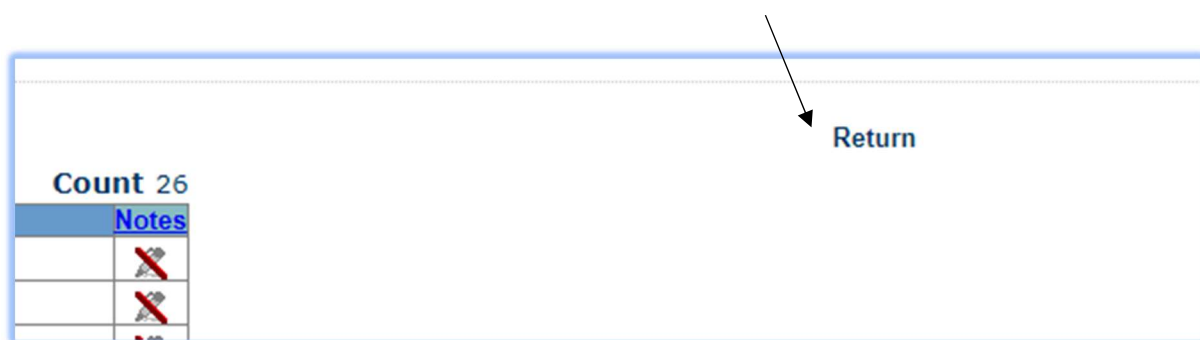


If you use this method to determine the issues on your return, please open your return and ignore the first part of the next step and go straight to 'Return Level Notes'.

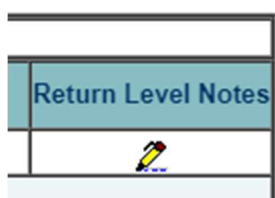
Adding Notes for remaining issues

- 15) If no changes are needed to your return and any queries are correct, a note needs to be recorded for the DfE and LA.

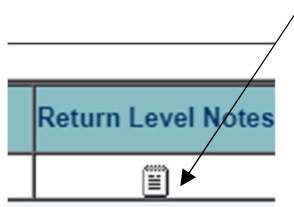
Make a list of the issue numbers, take a screen shot of the remaining queries or look at the 'School Error' report (see above) and click on 'Return' in the top right corner.



Look on the right and find the area called 'Return Level Notes'



If there are no notes recorded, the icon will be a small pen. As soon as a note is recorded the symbol changes to a notepad.



Click on the symbol and then 'Add new note'. This is the same every time you may need to add a comment.

Notes - SchoolCensus 2023_Spring Back

User	Full User Name	Role	Organisation	Native ID	Date and Time
------	----------------	------	--------------	-----------	---------------

< >

Add New Note Remove Note

Note Detail

If you do need to upload a new return, any notes you've previously added will still be recorded. There is no need to add a note again unless the DfE ask for more details.

- 16) The DfE have set wording they will accept for any notes. This can be found each term on the .GOV website here for the Pupil Census –

<https://www.gov.uk/guidance/complete-the-school-census/check-your-data>

Scroll down to 'Adding Explanation notes for queries', then click on the link at the bottom of the section.

[List of COLLECT queries and explanatory notes to help you complete the school census \(ODS, 32KB\).](#)

This will open a spreadsheet for the pupil census and you can search for the issue by the query number. There are three types of query, Pupils, School and TonT (term on term where the DfE has compared last term's information for your school against the information on this term's return to ensure there are no large changes). You'll need to click on the relevant tab to find the query information.

Please note that a copy of this guidance is also available on SchoolsWeb for each census return.

<https://schoolsweb.buckinghamshire.gov.uk/school-management-support/school-census/>

The wording the DfE will accept will be recorded on the final column on each of the tabs –

	Autumn	Spring	Summer	
				Acceptable notepad entry

Your comment will need two things to be accepted

- The error / query number
- A comment that matches the wording the DfE will accept.

The DfE will either need the exact wording they have requested. For example –

Confirmation is acceptable. Acceptable notepad entry 'confirmed as correct'.
--

For this query you can simply record – ‘1877q – confirmed as correct’

Or the DfE will need an explanation for why the query is correct. For example –

Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	1	1	1	Confirmation is not acceptable. A reason must be provided to ensure these are different pupils.
---	---	---	---	---

For this query you could record – ‘1620q – pupils are twins with the same forename, surname and date of birth but are known by the middle names’.

Please note – the file available on Schools Web has an additional column on each tab with the correct note that will be accepted by the DfE. If you have an error or query on COLLECT that is not covered in this file, please contact schoolcensus@buckinghamshire.gov.uk

- 17) When you have added notes for all your remaining queries, click on the 'Create' button below the text box



Create New Note

Create Cancel

COLLECT will now show who made the notes, when they were added and the note itself will be visible.

Please note that clicking on 'Create' before adding any text into the empty box will result in a blank note being submitted. Notes cannot be amended or deleted so you will need to add a new note again to add any text.

Notes - SchoolCensus 2023_Spring					
User	Full User Name	Role	Organisation	Native ID	Date and Time
c		Source			10/01/2023 12:44:16

Note Detail

1877q - confirmed as correct

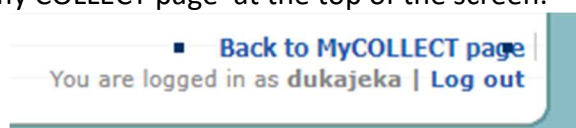
If the 'Full User Name' is not the name of the person who entered the notes, please contact your school's DfE Sign-in approver and ask for an account to be issued.

If you upload a new return, any notes already recorded will show below.

The screenshot shows a table titled "Preserved notes deleted by resubmissions" with columns: User, Full User Name, Role, Native ID, and Date and Time. Below the table is a section titled "Preserved Note Detail" with a large empty text area. A small blue icon is visible at the bottom left of the section.

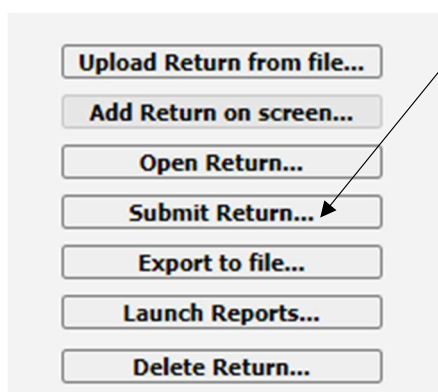
Submitting your return

- 18) When all your notes have been added, you're now ready to submit your return.
Click on 'Back to my COLLECT page' at the top of the screen.



You'll then be taken back to the screen where you uploaded your return.

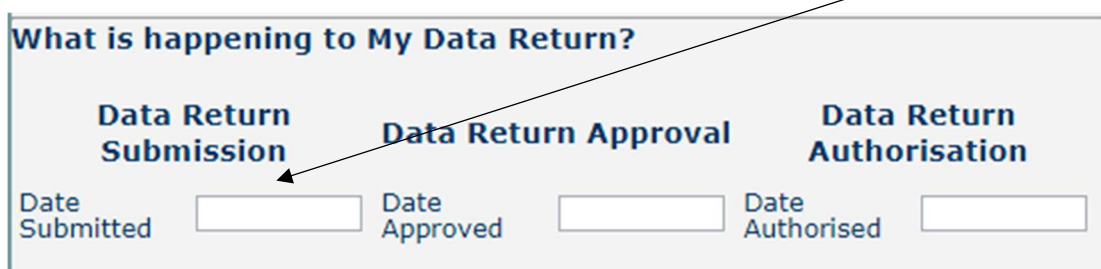
If you're ready, click on 'Submit Return'



For Academies, this means that the DfE can now access your data.
For Maintained schools, this means that the Local Authority can now access your data.

No further action can be taken by the DfE or the Local Authority if your return is not submitted.

When you submit your return, the date will appear in the 'Date Submitted' box



What is happening to My Data Return?

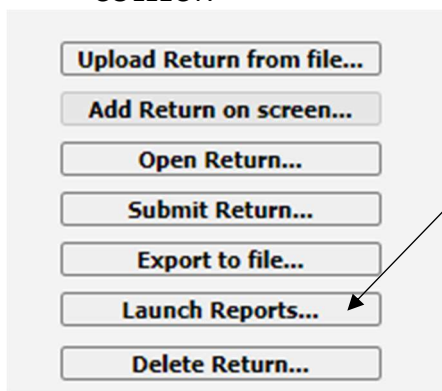
Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted	Date Approved	Date Authorised

For Maintained schools, when the Local Authority has Approved your return for the DfE, that date will appear in the 'Date Approved' box. This is usually when all issues on COLLECT have been resolved and acceptable notes have been added. Please be aware that this does not mean that your return is finalised. Our in-house validation takes place after returns have been approved so the DfE has time to carry out any further validation they need to complete as well. The DfE validation does not pick up all issues that can occur on returns so you may receive queries via AnyComms at a later date.

Final Authorisation is carried out by the DfE and the date your return is Authorised will appear in the 'Date Authorised' box. Academies should monitor this information closely during the census period. If your return is not authorised within a week of being submitted, please open your return and check the return level notes (see step 17 above). If the DfE have any questions about your responses, they will add a note themselves on COLLECT initially rather than phone.

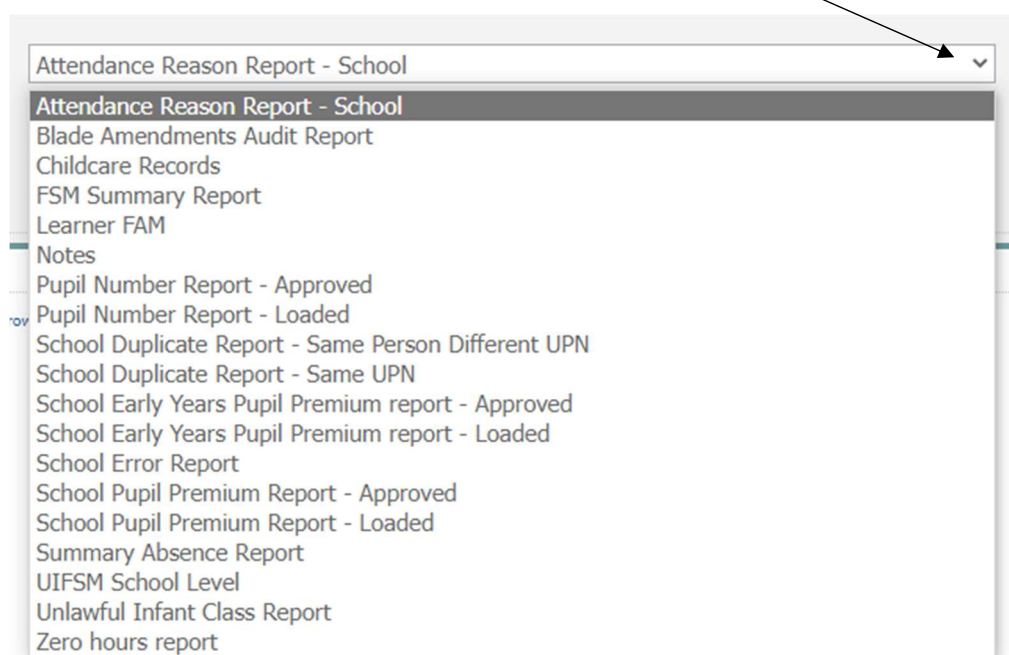
Checking reports

- 19) Maintained schools should now wait to hear from the Local Authority regarding any further issues. However, the DfE do provide some useful reports that colleagues may like to look at. These can be accessed by clicking on 'Launch Reports'. Please note that these reports are not updated until the morning after your return is uploaded to COLLECT.



Upload Return from file...
Add Return on screen...
Open Return...
Submit Return...
Export to file...
Launch Reports...
Delete Return...

Click on the down arrow to see the full list.



The reports do change depending on the term, but there are some useful ones that occur every term. From October 2024, the DfE have added a new validation rule. This will show on COLLECT the day after the return has been uploaded and it will list the reports the DfE expect school colleagues to run to check their data quality. The query will not clear until all reports listed have been run. If colleagues do not run the reports, a note will need to be added to explain why.

Blade Amendments Audit Report

This report shows any manual changes made to your return directly on COLLECT. If any changes are made, this should be printed off and a copy kept with the Full Summary that should have been signed by the Headteacher. The Headteacher should also be made aware of any changes made and the reasons behind them.

FSM Summary Report

Lists how many pupils are recorded as eligible for Free School Meals on census day and how many have been eligible since the last census day

Learner FAM

Lists pupil's UPNs and whether the child is reported as either receiving tutoring this year or if they are a post-16 student who is re-taking one year of study.

Pupil Number Report (Approved or Loaded)

Lists all NC year groups and shows how many pupils in each year group are recorded on your return. Also includes FTE for nursery pupils and those in Reception and above.

School Duplicate Report – Same Person Different UPN

This report records any pupil that is recorded on the returns for two different schools but the UPNs are different. This usually occurs when a pupil moves between schools and one of the schools has issued a new UPN rather than find their original one. If any issues appear on this report, please check 'Get Information about Pupils' to see if you have the correct UPN. If you are not sure, please contact the Local Authority for guidance.

School Duplicate Report – Same UPN

This report records any pupils who are recorded as being currently on roll at more than one school, but there is a discrepancy in the details on the returns. Issues can occur on this report for many reasons but the main ones are

- Enrolment status – Both schools have the pupil recorded as single, main dual or subsidiary dual registration, one school is single registration and the other school is main or subsidiary dual
- Two pupils have the same UPN, but one of the schools has the wrong one recorded
- The pupil is dual registered, the enrolment statuses are correct, but one school has the name or date of birth recorded incorrectly.

If the information recorded on your return is incorrect, please ensure that the issue is resolved. If the other school has incorrect information, please contact them and let them know about the issue. Please do not assume that the other school has checked their reports. When schools in other Local Authorities have been contacted in the past about issues on this report, the vast majority of them are unaware they need to be checked regularly.

Please note – any issues remaining on this report on the October Census may result in either your school losing half the funding for the affected pupil or your school taking half the funding from the other school. The DfE do not resolve any issues on this report, it is the responsibility of the schools affected. From October 2024, the DfE will not Authorise any returns where there are issues remaining on this report when the database closes. | For Academies we recommend that this report is checked once a week throughout the census period after your return is uploaded. Maintained Schools do not need to monitor this report as the LA does it for you.

School Error Report

If your school has a large number of issues when uploaded for the first time, this report can be useful to look at to identify the issues.

UIFSM School Level

Shows how many pupils being taught in Reception, Year 1 and Year 2 are recorded on your return as taking a school lunch on Census day.

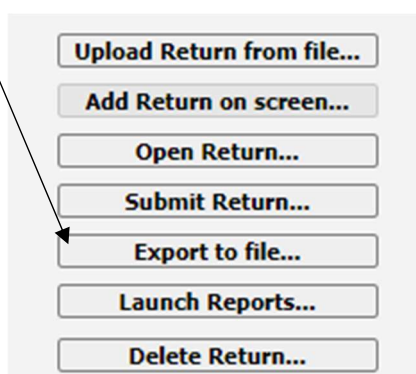
Zero Hours report

Shows how many nursery pupils of different ages are recorded with no funded hours information and also how many 2 year olds do not have Expanded hours recorded.

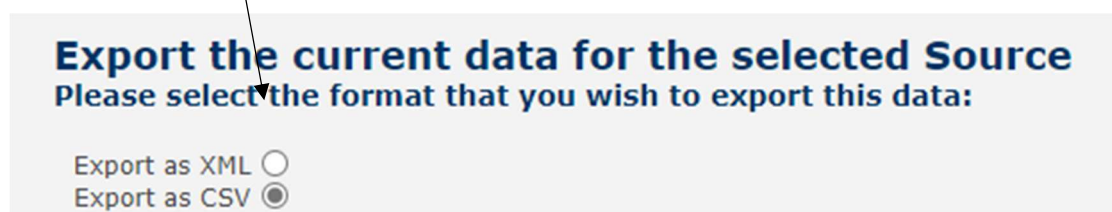
Exporting data from COLLECT

If colleagues have made manual changes to their return in COLLECT, it may be useful to export a copy of their final return for audit purposes when the census is finished.

Click on 'Export to File'



'Export as XML'



Export the current data for the selected Source
Please select the format that you wish to export this data:

Export as XML ☒
Export as CSV ☐

then 'Export'



We would always advise colleagues to upload a new return to COLLECT instead of making manual changes unless there is a software issue preventing a new return from being created in the MIS.