



Primary, Nursery, PRUs & Special Schools

SIMS End of Year Procedures

2024 - 2025

&

Creation of the

2025 - 2026 Academic Year

WARNING:

The procedures must be completed before the start of the new academic year.

It is critical the new academic year is created and the promotion routines run before the old year ends.

These processes determine the year groups and registrations groups into which pupils are placed in the new academic year.

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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.

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

Primary, Nursery, PRUs & Special Schools SIMS End of Year Procedures 2024 - 2025

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Introduction

This guidance issues 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.

WARNING: You **must** complete these procedures **before** the start of the new academic year.

It is critical the new academic year is created and promotion routines run before the end of the current academic year.

These processes determine the year groups and registration groups into which pupils are placed in the new academic year.

It is recommended to start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.

SIMS 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 functions in this document. Consult your System Manager if you are unsure whether you have the required permissions.

SIMS Documentation Centre

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

The ICT Schools Team are available on 01296 383500 Option 1 or email: ictschools@buckinghamshire.gov.uk should you be unable to find the assistance you require.

ICT Schools Team Support

The ICT Schools Team support schools with maintaining correct data and running data routines in SIMS. We are unable to advise on specific pupil issues regarding admissions, attendance codes, correct leaving dates etc.

Buckinghamshire Council SchoolsWeb

Refer to: <https://schoolsweb.buckscc.gov.uk/> for the relevant Teams including County Attendance, Children Missing Education, Admissions, Schools Management Support etc.

DfE Statutory Guidance

<https://www.gov.uk/government/collections/statutory-guidance-schools>

End of Year Check List

Please use the check list to ensure you have worked through the tasks required for end of year.

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.

✓	Description/Task
☐	Ensure SIMS has a backup
☐	Record changes to teaching and support staff in Personnel
☐	Review the current pastoral structure
☐	Create the new academic year
☐	Set up the new academic year's pastoral structure
☐	Validate memberships
☐	Create Pre-admission and Intake groups for new pupils.
☐	Import Admissions and Transfer Files (ATF)
☐	Import Common Transfer Files (CTF)
☐	Check Dates for Part-Time Pupils
☐	Setting up the promotion mapping for the new academic year
☐	Record leavers
☐	Change the Status of Applications to Offered, Accepted or Withdrawn
☐	Allocate applicants to Registration Groups/Classes
☐	Create Common Transfer Files (CTF) for leavers and upload to Schools2Schools
☐	Print class (registration group) lists for the new academic year
☐	Enter reasons for absence last year (if required)
☐	Other SIMS Module Processes
Routines After the New Academic Year has Started	
☐	Run: Validate Memberships & Database Diagnostics
☐	Admit applicants
☐	Re-admit pupils
☐	Check for missing marks & unexplained attendance marks for 24/25 academic year
☐	Official Register for 2024/25
☐	Part-time pupils – add start & end dates
☐	Apply part-time “attendance not required” codes to relevant pupils.
☐	Apply weekly pattern of not required
☐	Update the Selected Academic Year on the SIMS Home Page
☐	Import/Export CTF's
☐	Run Housekeeping Routines
☐	Update Pupil Premium Indicator for 2025-26
Refer to Chapter 10	

Chapter 1 Create the 2025/26 Academic Year

Introduction

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.

Important Notes for SIMS Users During Creation of the new Academic Year

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.

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 (even when a leap year).

For **Buckinghamshire schools**, the first day of term should be specified as **01/09/2025** 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 holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

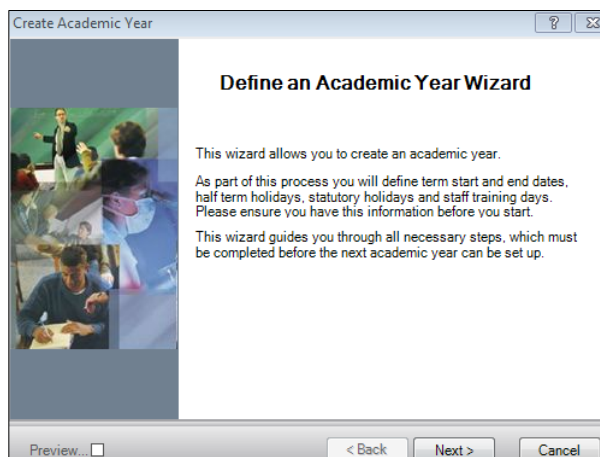
Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing the promotion process has been carried out).

Before proceeding, please check the following actions have been carried out:

- Ensure your system has a backup.
- Ensure you have details of the new academic year term dates, training days, etc.

Creating the New Academic Year

1. Select **Routines | School | Academic Year** to display the **Define an Academic Year Wizard**.
2. Click **Next** to display the **Define the school working week** page.



Define 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.

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 **Next**, and click **Yes** to the onscreen prompt, to display the **Define the terms and term holidays** for the academic year page.

Defining School Term Dates

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

In Buckinghamshire, all academic years run from the 1st September through to 31st August.

NOTE: The Academic Year Wizard checks the dates provided are valid and do not overlap.

- Term dates should not overlap.
- Half-term holidays should lie within the date range of a term.
- End of term holidays are expected to be more than one day in duration.

Messages relating to any discrepancies are displayed in the bottom area of the wizard.

On the last screen of the Academic Year wizard the summary of the year is displayed.

Term	Start Date	End Date	Term Holiday
Autumn Term	01/09/2025	19/12/2025	Christmas Holiday
Spring Term	05/01/2026	27/03/2026	Easter Holiday
Summer Term	13/04/2026	22/07/2026	Summer Holiday

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 entering the dates in **dd/mm/yyyy** format, or select from the calendar.
Alternatively, click in the date cell until a down arrow appears, then click the arrow to display a calendar, from which the required date can be selected.

2. Each term has a **default holiday** displayed in the **Term Holiday** column.

If required, select a different holiday from the drop-down list or overtype the term name, if required.

3. The holiday that follows the term is displayed by default.

Select a different holiday from the **Term Holiday** drop-down list if required.

4. Repeat this process for all the default terms displayed, selecting the applicable holiday for each term.
5. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.
6. Once the three term dates are entered, click **Next** to display the **Define the half term holidays** page. If **Next** is greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.

Holidays are automatically created for dates in between the term dates entered.

Eg. Where the Spring term ends on 27/03/2026 and the Summer term starts on 13/04/2026, SIMS anticipates the dates in between are holidays.

Defining Half Term Holidays

From the **Define the half term holidays** page, click **Add Holiday** to display the **Half Term Holiday Details** dialog.

Dates for half-term holidays need to be entered manually.

Category	Start Date	End Date	Description
Half-Term	27/10/2025	31/10/2025	Autumn Half Term
Half-Term	16/02/2026	20/02/2026	Spring Half Term
Half-Term	25/05/2026	29/05/2026	Summer Half Term

Create Academic Year

Define the half term holidays

Define the half term holidays, start and end date for every holiday. This information is optional.

Category	Start Date	End Date	Description
Half-Term	27/10/2025	31/10/2025	Autumn Half Term
Half-Term	16/02/2026	20/02/2026	Spring Half Term
Half-Term	25/05/2026	29/05/2026	Summer Half Term

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

Add Holiday... **Remove**

☐ Preview...

May 2026

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

Today **Clear** **Cancel**

1. Select **Half-Term** from the **Category** drop-down list. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** and select the required dates.
2. Enter a **Description** for the half-term holiday if required, eg. **Autumn Half-Term**. This description appears in the School Diary.
3. Click **OK** to add the half-term holiday.
4. **Repeat** steps 1 to 3 to add the Spring and Summer half-term holiday.
5. Click **Next** to display the **Define Teacher Training Days** page.

Defining INSET / 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.

Buckinghamshire LA Maintained schools have the following INSET date:

- Wednesday 3rd September 2025
- The **Four** other dates will be defined by the school

Note: Training dates not known at time of set up, can be added at a later point via:

Routines | School | Edit Academic Year

Category	Date	Description
Staff Training Day	03/09/2025	INSET
Staff Training Day	Defined by the School	INSET
Staff Training Day	Defined by the School	INSET
Staff Training Day	Defined by the School	INSET
Staff Training Day	Defined by the School	INSET

Create Academic Year

Define teacher training days

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

Category	Date	Description
Staff Training Day	03/09/2025	INSET

September 2025

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

No errors detected. Press

Add Re

Today Clear

Preview... ☐

< Back Next > Cancel

1. From the **Define teacher training days** page, click **Add** to display the **New Teacher Training Day** dialog.
2. From the **Category** drop-down list select **Staff Training Day**.
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** and select the date.
4. Enter a relevant **Description** if required, eg. **INSET**, to ensure the type of training can be identified. The description appears in the School Diary.
5. Click **OK** to add the teacher training day.
6. **Repeat steps 1 to 5** to add other teacher training days.
7. Click **Next** to display the **Define public holidays** page.

Defining Public Holidays, Bank Holidays and Non-Term Dates

In addition to other dates during term time, any public holidays, eg. Bank Holidays that occur during term time need to be entered.

If a public holiday falls within a half term or end of term holiday, it is not required to define the dates, however, these can be entered if you wish.

For **Buckinghamshire Council LA Maintained Schools**, **Monday 1st & Tuesday 2nd September 2025** are defined as school holidays, therefore, must be entered as **Non-Term Dates**.

Category	Date	Description (optional)
Non Term Date	01/09/2025	Non Term Date
Non Term Date	02/09/2025	Non Term Date
Public Holiday	04/05/2026	May Day Holiday

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
Non Term Date	01/09/2025	Non Term Date
Non Term Date	02/09/2025	Non Term Date
Public Holiday	04/05/2026	May Day Holiday

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

Add holiday **Remove**

Preview... ☐ **< Back** **Next >** **Cancel**

New Public Holiday

Category: **Public Holiday**

Date:

Description:

OK **Cancel**

1. From the **Define public holidays** page, click **Add holiday** to display the **New Public Holiday** dialog.
2. From the **Category** drop-down list, select **Bank Holiday**.
If the category name does not exist, type in the name manually.
3. Enter the relevant **Date** in **dd/mm/yyyy** format or click the **Calendar** to select the required date.
4. Enter a relevant **Description**, eg. **May Day Holiday**. This description appears in the School Diary.
5. Click **OK** to add the holiday.
6. **Repeat steps 1 to 5** to add **non-term dates** and **public holidays** throughout the academic year**.

Preview the 2025-26 Academic Year

To check the dates entered for the 25-26 academic year, click the **Preview** check box.

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
Non Term Date	01/09/2025	Non Term Date
Non Term Date	02/09/2025	Non Term Date
Public Holiday	04/05/2026	May Day Holiday

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

Add holiday **Remove**

Preview... ☒ **< Back** **Next >** **Cancel**

New Academic Year Preview

Academic Year 2025/2026

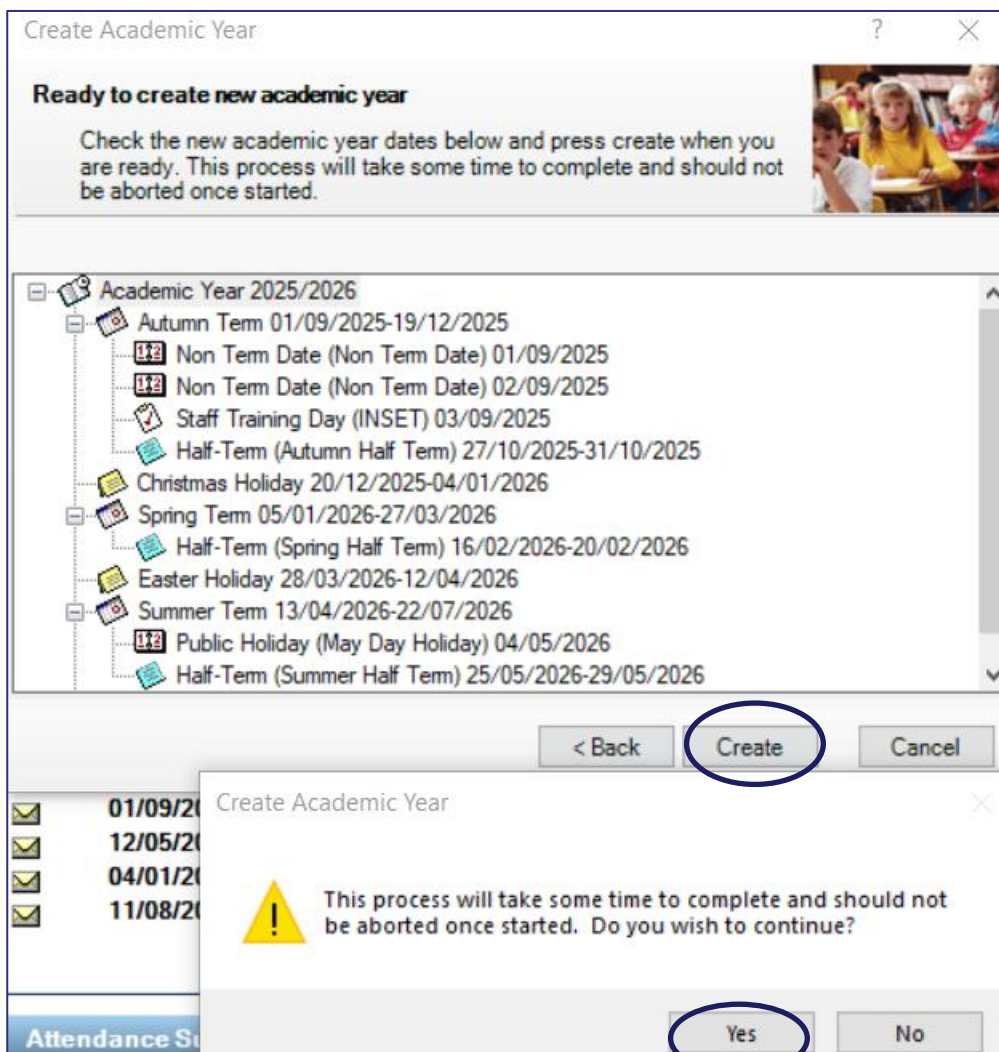
- Autumn Term 01/09/2025-19/12/2025
- Christmas Holiday 20/12/2025-04/01/2026
- Spring Term 05/01/2026-27/03/2026
- Easter Holiday 28/03/2026-12/04/2026
- Summer Term 13/04/2026-22/07/2026
- Summer Holiday 23/07/2026-31/08/2026

Creating the New 2025-26 Academic Year

Note: this process may take some time to complete because the system creates attendance records for the new academic year. Do not abort the process once started.

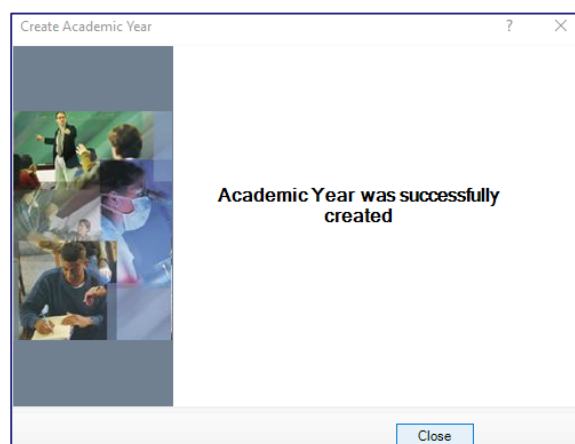
- A summary of the data entered is displayed on the **Ready to create new academic year** page.
- Click the applicable **+** icon to display details for each term's public holidays, INSET days etc.
- You are advised to check this information carefully for any errors or inaccuracies.

1. Once the information has been checked and is correct, click **Create** to create the new academic year.
2. If there are any anomalies in the settings, a message will display to **confirm whether you wish to proceed or review your settings**.
3. If the data is correct, you can proceed.
4. A warning message will be displayed, select **Yes** to the question “do you wish to continue”.



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

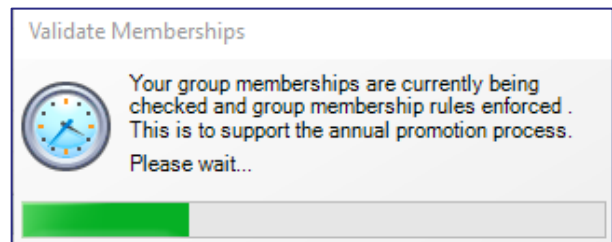
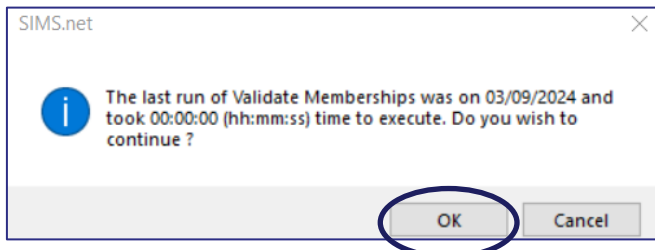
5. Once complete, the final page of the wizard is displayed confirming the **Academic Year was successfully created**.
6. Click **Close** to close the wizard and complete the process.



Validate Memberships

Once the new academic year has been created, it is recommended to run the **validate memberships** process.

1. Select **Tools | Validate Memberships**.
2. The following page is displayed:
3. Click **OK**. This process may take some time.



Once the new Academic Year has been created and Validate Memberships has been completed, SIMS is available for other users to log in.

Chapter 2 Admissions for September 2025

Introduction

Intake and **Admission groups** are used to maintain lists of applicants who have registered an interest in being taught at your school.



Always refer to the **latest** DfE guidance regarding the admission and removal of pupils from the Registers.

Working together to improve school attendance Guidance for maintained schools, academies, independent schools, and local authorities

[https://assets.publishing.service.gov.uk/media/65f1b048133c22b8eecd38f7/Working together to improve school attendance applies from 19 August 2024 .pdf](https://assets.publishing.service.gov.uk/media/65f1b048133c22b8eecd38f7/Working_together_to_improve_school_attendance_applies_from_19_August_2024.pdf)

DfE Expected First Day of Attendance

206. *Schools must enter pupils' names on the admission register on the first day that the school and a person with control of the pupil's attendance have agreed that the pupil will attend the school. If no date has been agreed or notified, the pupil's name must be entered on the first day they attend the school. Names must be added before or at the beginning of the first session on that day.*

209. *If a pupil fails to attend school on the agreed starting day, the school is expected to follow this up and try to establish the reason for absence. If they are unable to locate the pupil, schools should notify the local authority.*

Date of Admission

- The Date of Admission must be within the new academic year.
- The date of admission must be on a day when the school is open to pupils, not an INSET day or the first day of the academic year.
- If you have previously created admission groups with an incorrect date of admission, amending the date will also amend the Date of Admission for every applicant who is a member of the group. This prevents the need to edit them individually.

Add Intake Groups

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

NOTE: If an additional year group is required, eg. a Nursery has been introduced to the school, this should be added to the Pastoral Structure before admission groups are created to ensure the new year group is available for selection.

For more information, refer to Chapter 3 **Setting up the Pastoral Structure**

This is also a good time to delete or make inactive any unwanted admission groups, **refer to Appendix C: Admissions Module Set Up** for further guidance.

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.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2024/2025 - Autumn Year N2	2024/2025	Autumn	Year N2	20	Active
2024/2025 - Autumn Year R	2024/2025	Autumn	Year R	40	Active
2024/2025 - Summer Year 3	2024/2025	Summer	Year 3	1	Active

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

Intake Group Details: New

1 Intake Group 2 Admission Groups

1 Intake Group

Admission Year: 2025/2026 Name: 2025/2026 - Autumn Year R

Admission Season: Autumn Active: ☒

Year Group: Year R

Planned Admission: 60

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**.
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 R** (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).

Add One or More Admission Groups

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

This section describes how to add one or more admission groups to an intake group.

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**.

Tools | Admissions | Defaults. Tick **Multiple Admission Groups**.

Refer to **Appendix C: Admissions Module Set Up** for full details on setting up 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 any further admission groups are required, click **New** to add multiple Admission Groups.
Note: names must be unique.

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.

Importing Admission Transfer Files (ATF)

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 **must be** 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 **not** the date specified in your Admission Group.

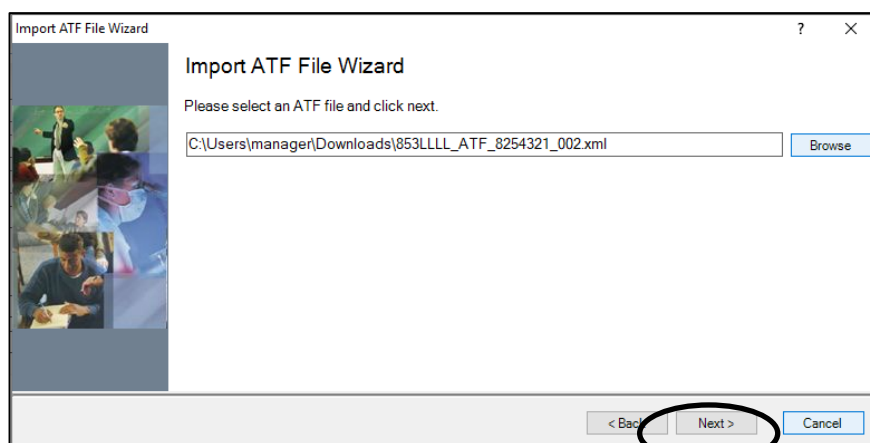
Pupil Telephone Numbers - Contact 1's telephone number are importing into **Panel 4** of the pupil's record due to a mapping issue on the ONE System and should be removed. This will happen even if you deselect "import contacts".

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.
 1. Click on Browse and navigate to the saved ATF File
 2. Click on Next



3. Locate the Intake Group from the dropdown

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”.

- Click on Next to the Matching Screen.

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.

Name	Reference	DOB	Gender	Matches	Action	Name	DOB	Gender	Role
Amy Davis	823-2023-10-K-000061	29/03/2019	Female	☐	New person	Amy Davis	29/03/2018	Female	Student, Appl
				☒	New Application				
Dobir Achmed	823-2023-10-K-000041	12/11/2019	Male	☐	New person	Dobir Achmed	12/11/2018	Male	Student, Appl
				☒	New Application				
George Honeyw	823-2023-10-K-000062	04/06/2019	Male	☐	New person	George Honeyw	04/06/2018	Male	Student, Appl
				☒	New Application				
James Tang	823-2023-10-K-000063	23/06/2019	Male	☐	New person	James Tang	23/06/2018	Male	Student, Appl
				☒	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, should not match with an existing 2024/25 applicant record and a duplicate pupil applicant record in 2025/26 **must** 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 (refer to Chapter 5).

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

If you opted to **Import Contacts** SIMS will 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.

Import ATF File Wizard

The following contacts within the ATF file have been matched with existing people. If you believe that the system has matched a person correctly, please indicate which person is the correct match. When you have completed this press next and the file will be imported.

Title	Name	Address	Matches	Title	Name	Address	Role
Mr	Calvin Tang	47 Fair Green Lane, Ballynahinch	☐	Mr	CALVIN Tang	3 Centurion Way, Northampton, N	Contact
			☒		New person		
Mrs	Julie Tang	47 Fair Green Lane, Ballynahinch	☐	Mrs	JULIE Tang	3 Centurion Way, Northampton, N	Contact
			☒		New person		
Ms	Karen Honeywell	74 Goosemere, Milton Keynes	☐	Ms	KAREN Honeywell	1 Goosemere, Milton Keynes, MK	Contact
			☒		New person		

Buttons: Print, < Back, **Next >** (circled), Cancel

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

Import ATF File Wizard

Your file is being imported. Please wait.

Buttons: < Back, **Next >**, Cancel

Import ATF File Wizard

The results of the import are shown below.

Number of applications in file: 5 Number of new applications: 5

Number of applications processed: 5

The file imported but with warnings:

Application Reference	Surname	Forename	Comments
823-2023-10-K-000064	Snappe	Louisa N	The number 0234 325261 for Contact William Grundy has been set as the main
823-2023-10-K-000061	Davis	Amy	The number 01245 369585 for Contact Jane Davis has been set as the main
823-2023-10-K-000061	Davis	Amy	The number 01235 542145 for Contact Adam Davis has been set as the main
823-2023-10-K-000062	Honeywell	George	The number 01845 543562 for Contact Karen Honeywell has been set as the
823-2023-10-K-000063	Tang	James	The number 01945 653247 for Contact Calvin Tang has been set as the main
823-2023-10-K-000063	Tang	James	The number 01247 548575 for Contact Julie Tang has been set as the main

Buttons: Print, Save, < Back, **Finish**, Cancel

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.

Importing Common Transfer Files (CTFs)

This section provides a summary of the steps required to import a CTF for an **applicant ONLY** .

- Pupils with CTFs can be imported into a **pre-admission group** or **directly on-roll**.
- If you do not have any CTF's to import, proceed to **Adding an Applicant to Admissions Manually, if applicable**.
- Appropriate intake/admission groups must be created before you can import CTF files (refer to **Adding Intake/Admission Groups**).

If any pupils in the CTF already exist in the system, only **blank** fields in their record are updated with data from the CTF. **Existing data is not overwritten**, as it is deemed to be the most up-to-date information.

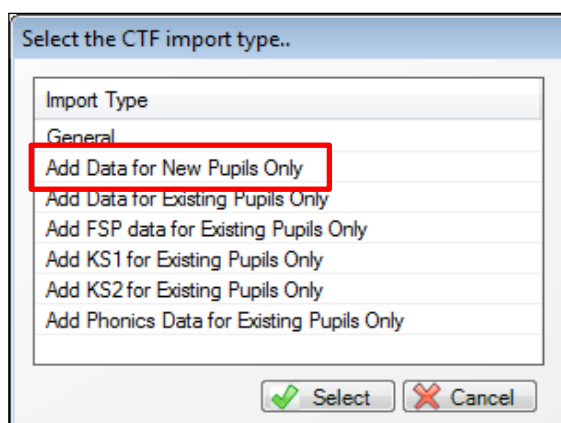
Any such information is highlighted in the **Exception Log** displayed at the end of the import process.

1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog.
2. Select **Add Data for New Pupils Only**

Panel 1: Data to be Imported, indicates the data items you want to import from the CTF by selecting the appropriate check boxes.

Panel 2: Import Selection to select the CTF to import.

1. Click on the folder icon and browse to the location of the CTF
2. Highlight CTF and click **Open** to return to the **Import CTF** page.



1. From **Place new pupils in**, select the admission group from the drop-down list (ie. **Pre-Admission**).
2. Click **Import CTF** to start the import.
3. Details of any errors are displayed in the **Exception Log** at the bottom of the **Import CTF** page.
4. Once you have finished importing the CTF, edit the details of the imported pupils as required.

Applicant Records

Once the ATF and/or CTFs have been imported, you can view the Applicant records.

1. Select **Focus | Admission | Application**.
2. Click **Search**.
3. The window will populate with all current Applicant records.
4. These can be opened and further information added when it becomes available.

Adding an Applicant to Admissions Manually – Pupils Previously On Roll

This is applicable to:

- **Non Section 27 Nursery Schools, where the pupil was on roll in a year group from E1 to N2 and subsequently left before the end of the 24/25 Academic Year.**

Use this method for applicants, who previously attended your School, and is now returning.

1. Select **Focus | Admission | Application** to display the **Find Application** screen.
2. Click **New** at top left, to open the **Add Applicant** screen.
3. Enter the **Surname** and **Initial** (in Forename) and click **Continue**.

The system will search for any matched records. If any are found, the **Matched People** dialog will appear with a list of matched records.

If the correct match for the applicant is already on the system, **highlight** and click **Open**.

The screenshot shows the 'Add Applicant' form. The 'Basic Details' section has fields for Surname (filled with 'kaur'), Forename, Gender (dropdown), and Date of Birth. A 'Continue' button is at the bottom right. The 'Matched People' section contains a message: 'The following people known to the SIMS database have similar details. To add a new Student with the details entered above, select New. To add an existing person or edit a known Student, select Open.' Below this is a table with columns: Full name, Gender, Roles, and Address. Two rows are listed: 'Kaur, Aafia' (Female, Student, 12, Cornwall Road, Bedfordshire) and 'Kaur, Mr Mohammed' (Male, Contact, 12, Cornwall Road, Bedfordshire). To the right of the table are 'New' and 'Open' buttons.

Full name	Gender	Roles	Address
Kaur, Aafia	Female	Student	12, Cornwall Road, Bedfordshire
Kaur, Mr Mohammed	Male	Contact	12, Cornwall Road, Bedfordshire

- The applicant record will open on screen.
- Select the required **Intake Group** and **Admission Group**.
The Year Group, Year Taught In and Date of Admission will complete automatically.
- Save** the record.
- Further information can be updated.

Adding an Applicant to Admissions Manually – Never Previously Attended

Applicants can also be added manually, one at a time, to the Admissions area of SIMS.

This is generally used for applicants added after the ATF has been imported.

- Select **Focus | Admission | Application** to display the **Find Application** screen.
- Click **New** to open the **Add Applicant** screen.

This screenshot shows the 'Add Applicant' form with empty fields for Surname, Forename, Gender, and Date of Birth. The 'Continue' button is visible at the bottom right.

- Enter **Basic Details** for the applicant and click **Continue**.

NOTE: The system will search for any matched records - **there should be no matched records**

If any matching records are found, please abandon the process and investigate the pupil record before proceeding

- A blank applicant record will open.
- Complete the required fields in:
 - Basic Details Panel
 - Registration Panel
- Save** the record.
Further information can be added when available.

Changing the Status of Applications

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.

- Once added, an application is automatically given a status of **Applied**.
- If required, you can 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 they will be joining.
- It is possible to change an application status from **Applied** to **Accepted**, if required.
- It is also possible to change the application status of individual applicants.
- This section assumes you have added all the required applicants via **Focus | Admission | Application** or imported via a CTF or ATF.

Finalising Offers

Once the school offers places to applicants eg. **Year R** or **Year 3**, follow the instructions in this section.

If you do not record offers made, but wish to identify applicants who have accepted a place at your school, refer to **Accepting Applicants**.

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

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2024/2025 - Autumn Year R	2024/2025	Autumn	Year R	60	Active
2024/2025 - Autumn Year N2	2024/2025	Autumn	Year N2	60	Active
2024/2025 - Autumn Year 3	2024/2025	Autumn	Year 3	30	Active
2023/2024 - Spring Year 4	2023/2024	Spring	Year 4	1	Active
2023/2024 - Autumn Year R	2023/2024	Autumn	Year R	40	Active
2023/2024 - Autumn Year N2	2023/2024	Autumn	Year N2	20	Active

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

Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
	Achmed, Dobir	Male	12/11/2010	Offered		✓	
	Davis, Amy	Female	29/03/2011	Offered		✓	
	Honeywell, George	Male	04/06/2011	Offered		✓	
	Shape, Louisa N	Female	12/11/2010	Offered		✓	
	Tang, James	Male	23/06/2011	Offered		✓	

- 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**, and **Admitted** are updated as applicable information is edited and saved.

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

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

Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
	Achmed, Dobir	Male	12/11/2010	Offered		✓	
	Davis, Amy	Female	29/03/2011	Applied	✓		
	Honeywell, George	Male	04/06/2011	Applied	✓		
	Shape, Louisa N	Female	12/11/2010	Offered		✓	
	Tang, James	Male	23/06/2011	Offered		✓	

Accepting Applicants

This section describes how to record applicants who have accepted a place at your school by changing their application status to **Accepted**. This can be achieved for all pupils in an intake group.

It can also be achieved at individual pupil level via **Focus | Admission | Applicants**.

NOTE: To enable attendance registers to be taken on the first day of term and for new pupils to be allocated to a Registration Group, they must have a status of **Accepted**.

Pupils can then be admitted once they have arrived in school.

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.
2. **Search** and double-click the required intake group to display the **Accept/Denial Applications** page.

1 Summary			
Planned Admission	150	Accepted	0
Total Applicants	5	Withdrawn	0
Applied	0	Rejected	0
Offered	5	Admitted	0

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**, and **Admitted** 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.

1. To **accept**, click in the cell to put a tick in it
2. To withdraw, click the **Withdraw** column.

2 Applications							
Current Application Status: Accepted							
Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal	
Achmed, Dobir	Male	12/11/2010	Accepted	Accepted	✓		
Davis, Amy	Female	29/03/2011	Accepted	Accepted	✓		
Honeywell, George	Male	04/06/2011	Accepted	Accepted	✓		
Snape, Louisa N	Female	12/11/2010	Accepted	Accepted	✓		
Tang, James	Male	23/06/2011	Accepted	Accepted	✓		

If you want to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.

- Once complete, click **Save** 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.

Adding Part Time Details for Applicant Records

If **Part Time** details are known, it is possible to add them to Applicant Records.

1. Focus | Admission | Application

- Search** for Applicant record and select **Open**.

3. Panel 2: Registration Details.

- Tick the **Part-Time** check box. The **Start Date** and **End Date** will default to the next academic year. This can be amended if necessary.

- Save** the record.

- Continue** for all applicable Admission records.

2 Registration Details

Application Status	Accepted	Application Reference Number	
Intake Group	2025/2026 - Autumn Year N2	Admission Group	2025/2026 - Autumn Year N2 (A)
Year Group	Year N2	Year Taught In	Curriculum Year N2
Class		House	
Date Of Admission	05/09/2025	Age On Entry	
Admission Number		Enrolment Status	Single Registration
Boarder Status		Late Application	☐
Local UPN			
☒ Part-Time			
Start Date	05/09/2025		
End Date	22/07/2026		

Early Years Attendance Patterns

Monday Provision Type	Provision 1
Tuesday Provision Type	Provision 1
Wednesday Provision Type	Provision 1
Thursday Provision Type	No Provision
Friday Provision Type	No Provision

Bulk Update Applicant's Details

It is possible to bulk update applicant records for certain data items.

- Select **Routines | Admissions | Bulk Update Applications**
- Select:
 - Group Type** = Intake Group
 - Group** = 25/26 Pre-Admission Group
 - Application Status** = Current
 - Data Item** = select the **data item** you wish to update.
- Click **Search** to see Applicants to update records.

Bulk update Applicant

Search
 Browse

Bulk Update

Applicant Population

Group Type
Intake Group

Group
2025/2026 - Autumn Year R

Application Status
<Current>

Update Data Item

Data Item
Ethnicity

Bulk Update Ethnicity - Intake Group: 2025/2026 - Autumn Year R

Save
 Undo
 Print

1 Members

1 Members

Name	Year Group	Assigned	Afghan	African Asian	AKAS - Kashmiri	Albanian	Arab	Arab Other	Asian - British
Snape, Louisa N	R	Unassigned							
Achmed, Dobir	R	Asian - British							✓
Davis, Amy	R	Information Not Yet Obtained							
Honeywell, George	R	Information Not Yet Obtained							
Tang, James	R	White - English							

4. Tick the applicable data item on the right for the applicant name on the left.
 1. Use the scroll bar at the bottom.
5. Once completed, click **Save** and each applicant record will be updated according.
 - Click on the **Browse** button at the top to return to the search area to select another **Data Item** to update
 - Click on **search** and repeat steps 4 to 5 above.

Chapter 3 Setting up 2025/26 Pastoral Structure

Introduction

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

There may be occasions when the next academic year's pastoral structure needs to be different from the current structure. For example:

- Add additional classes, where pupil numbers have increased.
- Merge registration groups, where pupil numbers have decreased.
- Add a new year group, eg. where a Nursery has been introduced in your school.
- Change class names.

NOTE: It is not essential to assign teachers to registration groups at this stage; this can be done when the information is known **but should be done before the start of the academic year** so Attendance records are not affected. Refer to **Appendix A: Recording Changes to Teaching Staff in Personnel**.

If teachers are to be promoted with their pupils into the next academic year, it can be actioned as part of the pastoral promotion process.

New Teaching Staff for 2025/2026

If you wish to allocate a new teacher to a registration group, a basic personnel record must be created with an employment start date of 01/09/2025 (or before) and the **Teaching Staff** check box ticked.

The screenshot shows the 'Personnel Management' window with the 'Employment Details' tab selected. The employee name is 'Robert Jones'. The 'Teaching Staff' checkbox is checked. The 'Teacher Number' is '03/82695', 'Teacher Category' is 'Qualified Teacher', and 'Staff Code' is 'RJ'. The 'Employment Start' date is '01/09/2023'. There are buttons for 'Save', 'Undo', 'Print', and 'Suspend' at the top. At the bottom right, there are buttons for 'New', 'Open', and 'Delete'.

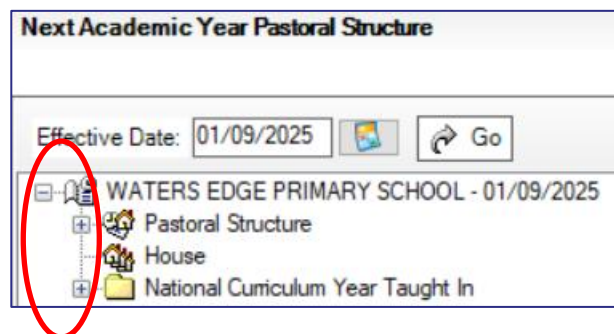
Refer to **Chapter 9: Recording Changes to Teaching Staff in Personnel**.

Opening the Pastoral Structure of the New Academic Year

To ensure changes are being made for the next academic year, the start date of the next academic year must be displayed in the **Effective Date** field.

The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, **01/09/2025** must be used in order to edit information

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.
2. Click **Go**.
3. The full structure can be viewed by clicking the **+** or **-** icons to expand or close the display.

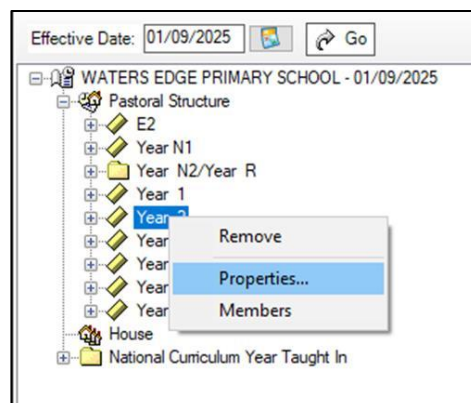


Checking National Curriculum Years

Ensure the **National Curriculum Year** associated with each year group is correct. This should be correct as the structure has been copied for previous year.

1. Right click on each **year group** and select **Properties** from the pop-up menu to display the **Year Group** dialog.

The **National Curriculum Year** associated with the year group is displayed.

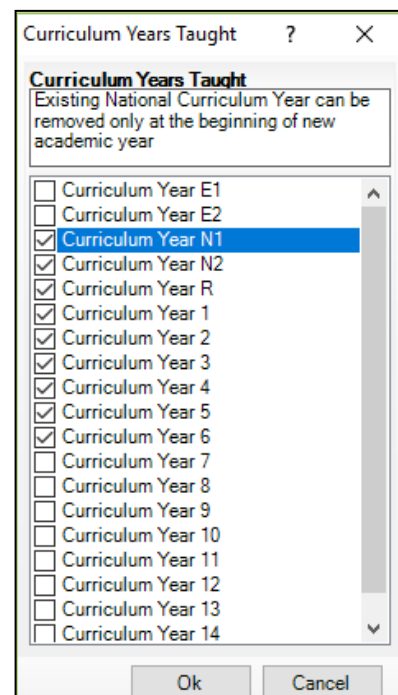
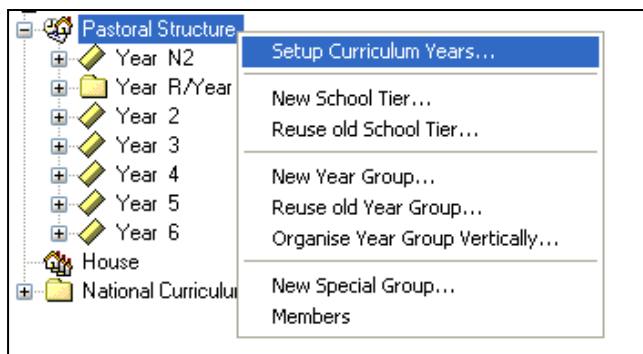


Adding New National Curriculum Year Groups

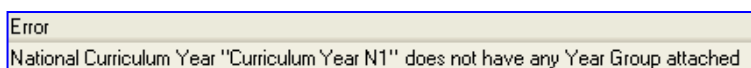
If an additional year group is required, eg. Nursery classes N1, E2 or E1; this should be added before admission groups are created to ensure the new year group is available for selection.

If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year.

1. Right click **Pastoral Structure** in the navigation tree.
2. Select **Setup Curriculum Years**.
3. Select the required **Curriculum Years Taught** check box(es).



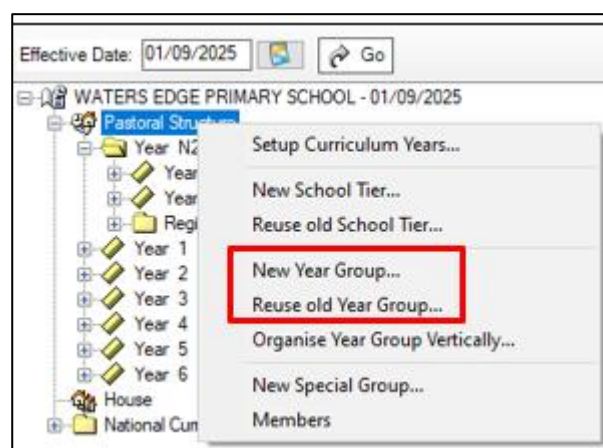
Errors are displayed at the bottom of the screen until years and classes have been added (as shown in the following graphic).



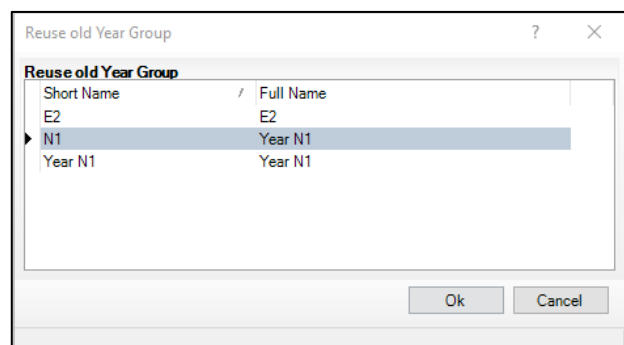
Adding a Year Group

Right-click the **Pastoral Structure** item in the structure and select:

There are two options:



1. **Re-use Old Year Group** – for year groups previously used in the Pastoral Structure
 - a. **Use this option first to check.**
2. **New Year Group** for Year Groups never used in the Pastoral Structure previously



- a. Select the **National Curriculum Year** which the year group will be associated, from the drop-down list.
3. Enter a **Short Name**** (max. 10 characters) and **Full Name** (max. 32 characters) for the **Year Group**.

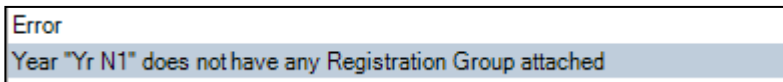
The **Full Name** is used in SIMS to identify the **Year group** (eg. Year N1).

The **Short Name** is used for **Column Headings** in reports (eg. N1).

Both names must be unique within the school.

4. Select the **Head of Year** if required, by clicking the **Browser** to display the **Select person** dialog. This is optional.
5. Click **OK** to return to the main screen.

An error will appear at the bottom. A reg group must be added to save the Pastoral Structure.



Add a Registration Group to a New Year Group

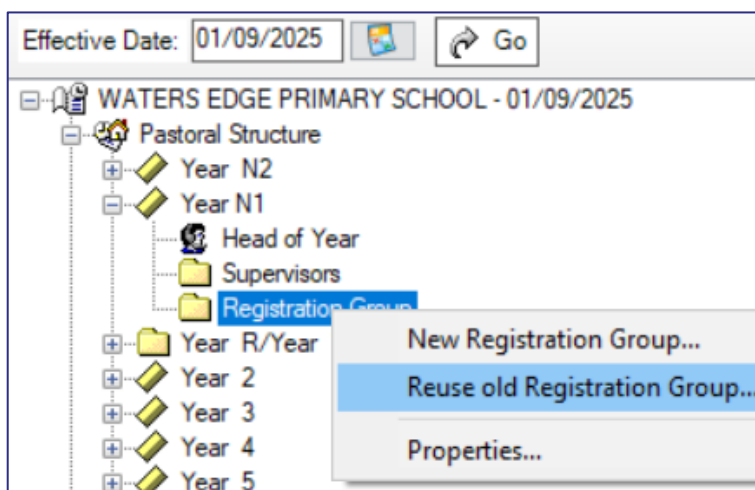
There are two options.

- Reuse and Old Registration Group
 - It is advisable to check whether the name you intend to use for a new class has not previously been used.
- New Registration Group
 - Use this option if there are no existing registration groups for your year groups.

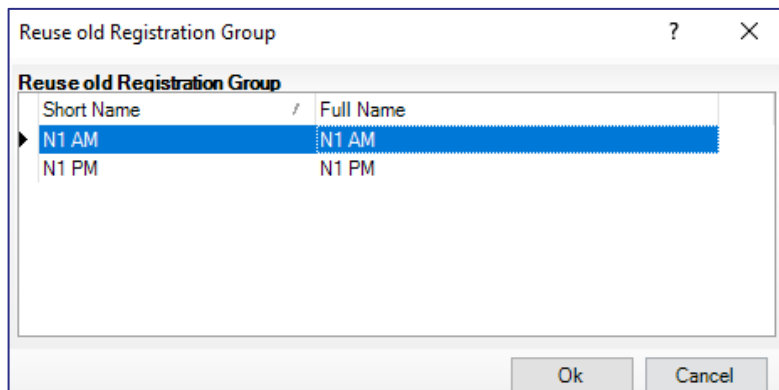
Reuse an Old Registration Group

1. Expand the year group to which you wish to add the class by clicking the adjacent + icon.
2. Right-click the **Registration Group** folder

Select **Re-use Old Registration Group** for Registration groups previously used in SIMS.



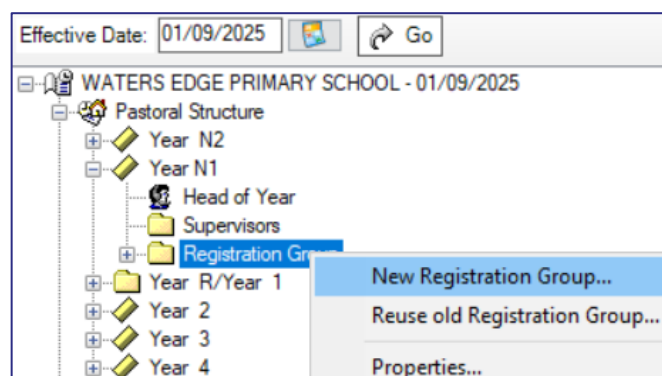
3. **Highlight** the **Reg Group** to reuse.
4. Select **OK**.



Add a New Registration Group

For Registration Group names not previously used in SIMS.

1. Enter a **Short Name** and a **Full Name** for the new class.

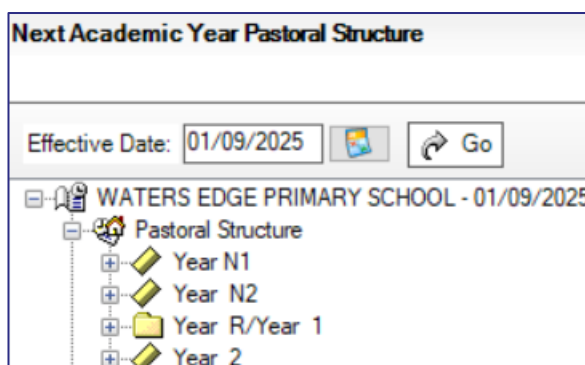


The **Full Name** is used in SIMS to identify the **Year group** (eg. Year N1).

The **Short Name** is used for **Column Headings** in reports (eg. N1).

Both names must be unique within the school.

2. Click **Save** to save the Pastoral Structure.



Changing Year Group Horizontal/Vertical Structures

If there are no changes the pastoral structure, proceed to **Changing a Class Teacher**.

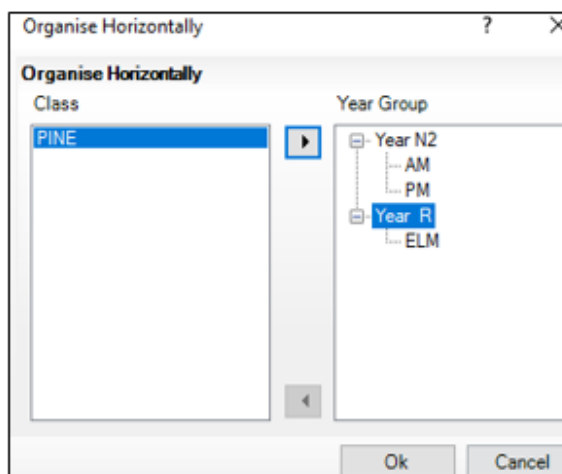
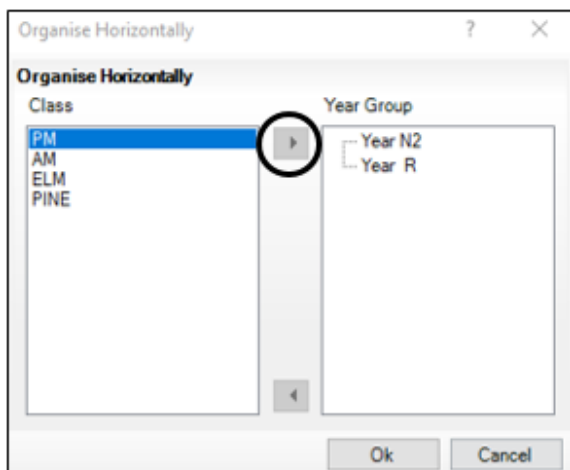
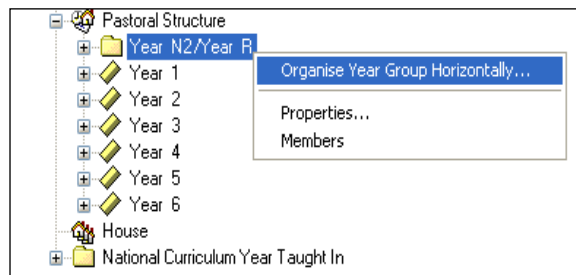
If you have the odd pupil taught out of year, you do not need to amend the structure.

- A **horizontal** structure is where pupils in a Registration Group are all in the **same** Year Group.
- A **vertical** structure allows a Registration Group to contain pupils from **different** Year Groups.

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

Changing from a Vertical to a Horizontal Structure

1. Expand the **Pastoral Structure** heading by clicking the + icon. Vertically organised year groups can be identified by their names, separated by a forward slash, eg. Year N2/Year R.
2. **Right-click** the vertically organised year group.
3. Select **Organise Year Group Horizontally** from the pop-up menu to display the Organise Horizontally dialog.
4. In the **Class panel**, highlight the class(es) you wish to attach to a year (hold down the Ctrl key and click the class names to highlight more than one class) then click the required year group in the Year Group panel.
5. Click the **right arrow** in the centre of the dialog to attach the selected class(es) to Nursery (Year N2). The class(es) are moved under the Year N2 heading, as shown in the following example.
6. Repeat steps 4 and 5 for all the remaining classes in the Class panel.

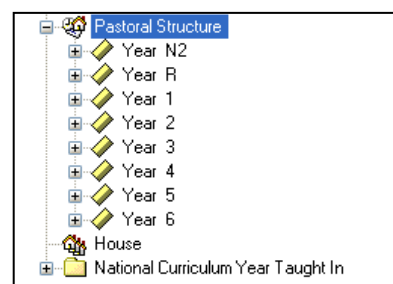


NOTE: Each class must be attached to a single year group and therefore, the Class panel must be empty before you can complete the process.

7. Click **OK** to save the details.

The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.

8. Click **Save**.



Changing from a Horizontal to a Vertical Structure

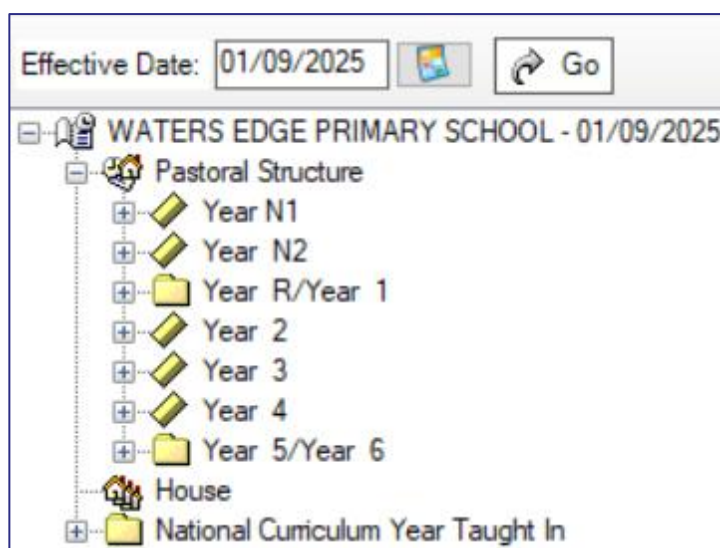
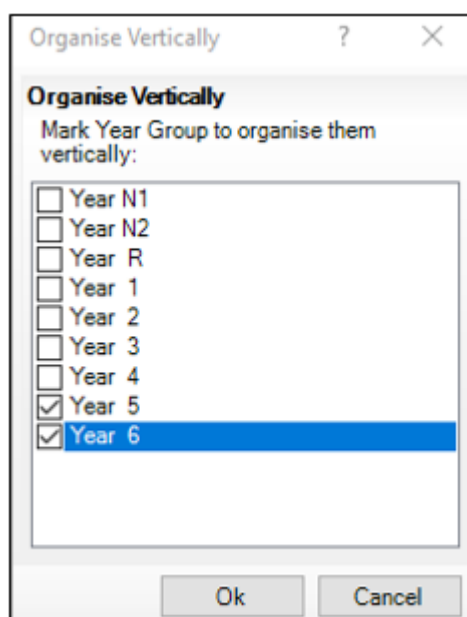
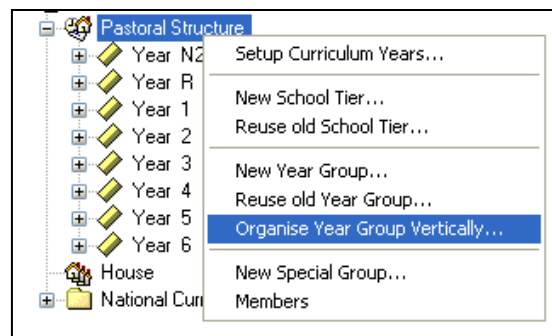
This process may be required if, for example, pupil numbers have decreased. This could allow previously separate years, eg. **Year 5 & Year 6** (horizontally structured) to be merged into a single year, vertically structured.

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

1. Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.
2. Select the check boxes adjacent to **Year 5** and **Year 6** (ie. the year groups being merged into a vertical structure).
3. Click **OK** to merge the selected years.

These are displayed in the pastoral structure separated with a / (as shown below).

4. Click **Save** at the top of the Pastoral Structure.



Adding or Changing Registration Groups (Classes)

If you do not need to add or remove any classes, proceed to **Changing Class Registration Tutors**.

- Always check whether the name intended to use for a new class has not previously been used.
- Expand the Pastoral Structure and appropriate year group.
- Right click the **Registration Group** folder and select **Reuse Old Registration Groups** from the pop-up menu to display the **Reuse old Registration Group** dialog. This lists any classes previously removed.

Edit Class Names Warning

It is essential you **do not** rename the class 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.

If a class name is to be changed for this new academic year, you must add the new class name to the pastoral structure, and then remove the unwanted class.

If the required name is listed, highlight it, and click **OK** to re-use the class rather than create a new class with the same name.

If the required name is not listed, click **Cancel** and create a new class (see below)

1. Expand the year group to which you wish to add the class by clicking the adjacent + icon.
2. Right-click the **Registration Group** folder

Either:

New Registration Group - for Registration names not previously used in SIMS.

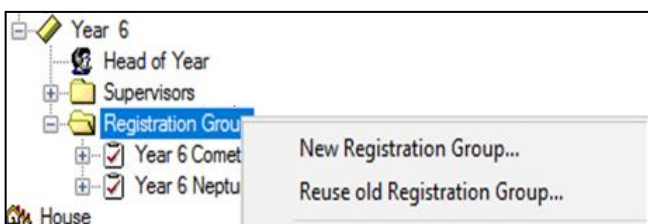
Enter a **Short Name** and **Full Name** for the new class.

or

Re-use Old Registration Group for Registration groups previously used in SIMS.

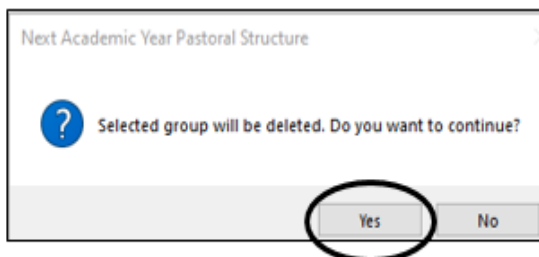
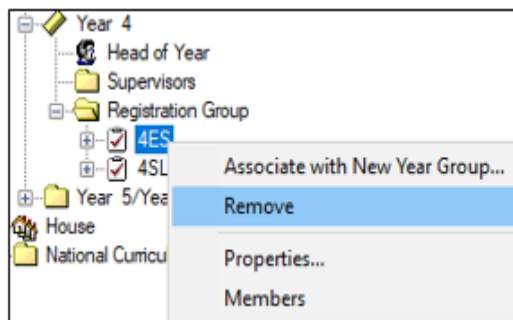
3. Click OK.

Refer to page 32 **Two Registration Tutors**.



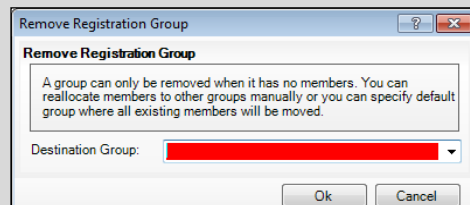
Removing Unwanted Classes from the Pastoral Structure

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure**
2. Expand the Pastoral Structure until you can see the Registration Group to be removed.
3. **Right click** on the name of the group to be removed and select **Remove** from the menu.
4. Click **Yes** to the warning message.
5. Click **Save**.



If there are previously assigned pupils in the 25/26 Academic structure they must be assigned to the new group.

- Click the **Destination Group** drop-down list
- Select the Reg group.
- Click **OK** to delete the registration group and transfer the pupil membership.
- Click **Save at top**

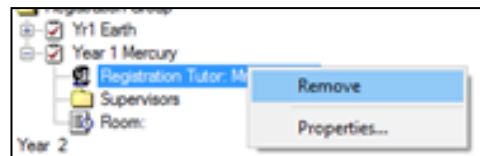


Adding/Removing a Class Teacher on the Pastoral Structure

This process can only be carried out where class names are going to remain the same and it is only the associated teacher that is changing.

If the class name is going to change, refer to **Important Note on Editing Class Names**.

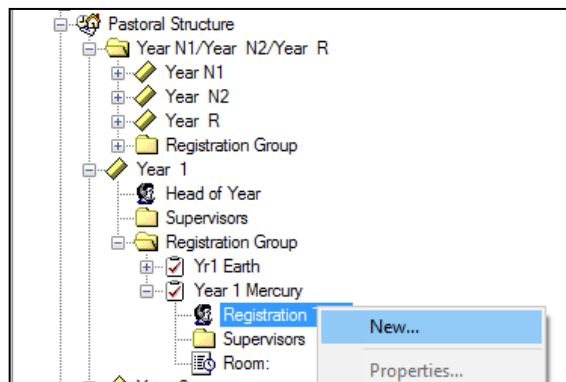
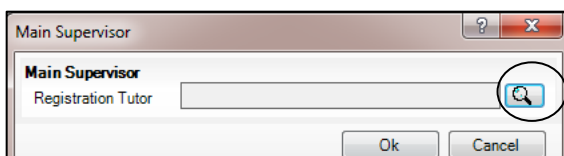
1. Expand the **Pastoral Structure** heading by clicking the + icon.
2. Expand the required **Year Group**.
3. Expand **Registration Group**.
4. Expand the required Registration Group to view the **Registration Tutor**.



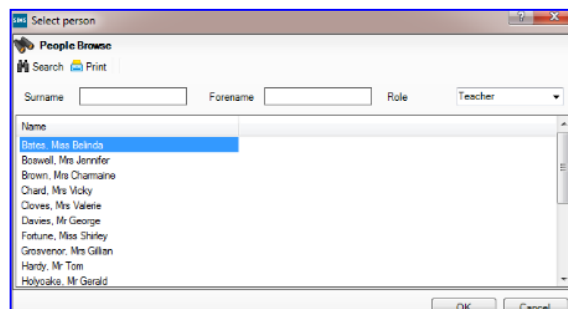
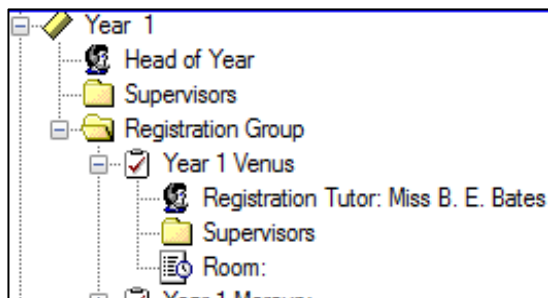
5. **Right click** on the name and select **Remove** from the menu which will **delete** the Teacher name

If there is no Teacher assigned

6. **Right click** on **Registration Tutor** and click **New**.
7. Click the magnify glass to display the Select person browse and click **Search**.



8. Highlight the required person and click **OK**.



NOTE: An onscreen warning may appear if the member of staff is still allocated to their previous class. Say **Yes** to continue. This will resolve once you have associated all members of staff to their new classes.

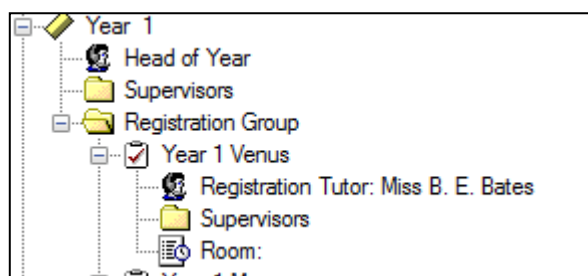
9. Click **OK** again and the new member of staff will now show as the Registration Tutor.
10. Click **Save**.

Classes with Two Registration Tutors

If you do not have any classes with two Registration Tutors, proceed to **Saving the Amended Pastoral Structure**.

Expand the **Pastoral Structure** heading by clicking the **+** icon.

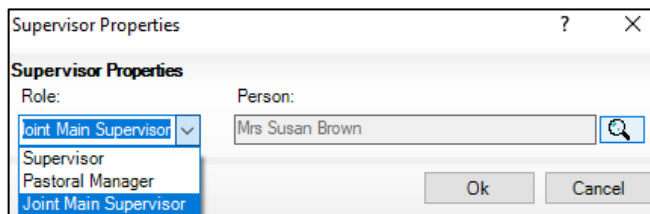
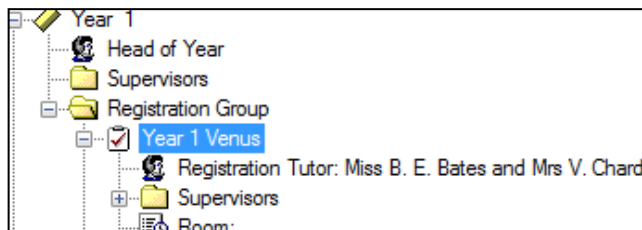
1. Expand the required **Year Group**.
2. Expand the required **Registration Group**.
3. Check the primary Registration Tutor has been assigned as outlined earlier.



NOTE: Within SIMS, the name of the **Primary Registration Teacher** will appear **first** on class lists. The responsibility of deciding which member of staff is recorded as the primary Registration Tutor lies with the school.

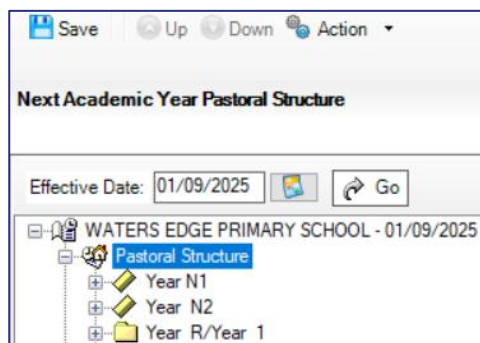
Add a Second Registration Tutor.

4. **Right click** the **Supervisor** folder.
5. Select **Role** of **Joint Main Supervisor**.
6. Click **Browser** adjacent to the **Person** field to open the **Select Person** browser. Select the required person.
7. Click **OK** on the **Supervisor Properties** dialog to return to the **Class** dialog.
8. Both staff will now show as Registration Tutors.
9. Click **Save**.



Saving the Amended Pastoral Structure

Once the required changes have been made to the pastoral structure, click **Save**. This may take some time depending how frequently you have saved.



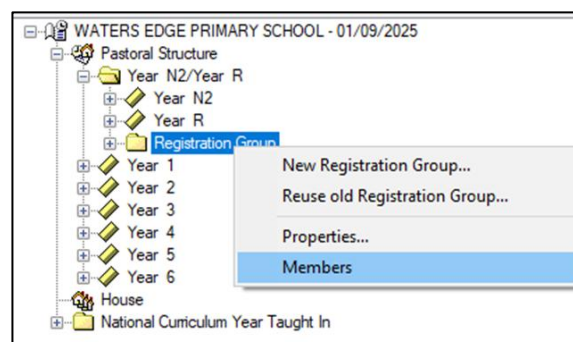
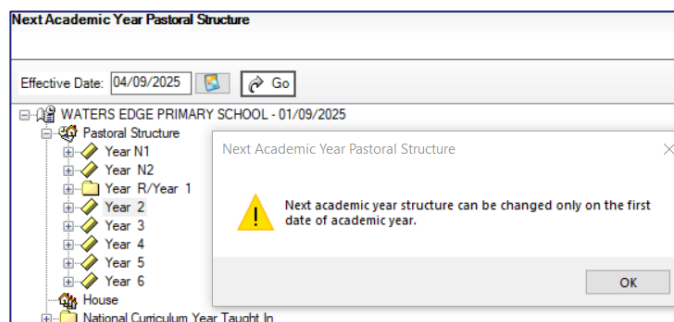
Allocating Applicants to Registration Groups/Classes

Before allocating applicants to Registration Groups, you must have added the applicant by either:

- Created Pre-admission groups
- Imported a ATF or CTF or manually added your applicants
- Applied the appropriate application status for each applicant (refer to **Accepting Applicants**).

NOTE: Pupils attending your School for the first time eg. YR or Y3 and whose details are in a **Pre-Admission Group**, the **Pastoral Structure Effective Date** must be the same date as the pre-admission group date eg. 04/09/2025 and **not** the first day of the Academic Year.

1. Change **Effective Date** to the **date of admission** as defined in the Intake Group eg. 04/09/2025 (not 01/09/2025).
2. Click **Go**.
3. Click **OK** to the warning message.
4. **Expand the Pastoral Structure**
5. **Expand the Year Group** until the **Registration Group** folder is visible under the required year.
6. **Right-click** the applicable **Registration Group** folder and select **Members**



The **Name**, **Gender**, current **Year Group**, and current **Reg Group** is 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.

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

- **Pupils** – 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**. 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**. 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.

This routine is carried out once the new academic year has started.

- Additional columns of information can be added to the grid by clicking **Actions** eg. Date of Birth.
- 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.
- Once you have selected classes for each the applicants, click **OK**.
- Click **Save the Pastoral Structure**.

Allocate Students/Applicants : Year R

Effective Date Range
☒ From effective date to end of the academic year ()
☐ Over the whole academic year (01/09/2025 - 31/08/2026)

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

Members

Name	Gender	Year Group	Reg Group	ELM	ASH
Achmed, Dobir	Male	Year R		✓	
Davis, Amy	Female	Year R			✓
Honeywell, George	Male	Year R		✓	
Snape, Louisa N	Female	Year R			✓
Tang, James	Male	Year R			

Total 2 2

OK Cancel

Chapter 4 Recording 2024/25 Leavers

Introduction

The facility to record leavers enables accurate records to be kept of pupils after they have left the school. Pupils should only be marked as leavers if you are sure they are leaving, eg. **Year 2** pupils moving to Junior School; **Year 6** pupils moving to Secondary school.

DfE Statutory Guidance Notes

Working together to improve school attendance Guidance for maintained schools, academies, independent schools, and local authorities

https://assets.publishing.service.gov.uk/media/65f1b048133c22b8eecd38f7/Working_together_to_improve_school_attendance_applies_from_19_August_2024.pdf

Always refer to the latest **DfE Statutory guidance** regarding the removal of pupils from the Registers.

Refer to <https://schoolsweb.buckscc.gov.uk/behaviour-wellbeing/children-missing-education/children-missing-education-buckinghamshire-council-guidance/legislation-guidance/>

Date of Leaving:

The **leaving date** must be a date when the pupil could have attended school ie. the last school day of the 2024/25 academic year eg. 22/07/2025.

Do not make a date of leaving on an INSET day or during the school holidays.

Do not make a date of leaving on the last day of the academic year ie. 31/08/2025.

Do not record leavers by removing their date of admission because this will affect all historical data relating to the pupil.

Recording “End of Phase” Leavers - Year 2 and Year 6

1. Select **Routines | Pupils | Leavers**.
2. **Search** for the required pupil. Double-click their name to display **Manage Pupil(s) Leaving Details** page.
3. 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.

The screenshot shows the 'Find Pupil(s)' window in the SIMS software. It includes search filters for Surname, Forename, Status (set to 'On Roll'), Year Group (set to 'Year 6'), and Class (set to '<Any>'). A 'Select' dropdown menu is open, showing 'All' and 'Selected' options. Below the filters is a table of pupils with columns: Name, Year Group, Class, Adm. No., Date of Admission, Date of Leaving, Reason for Leaving, Destination, Expected Start, and Grounds for Removal.

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Expected Start	Grounds for Removal
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					

4. From the **Select** drop-down menu, select **All** to select all the pupils displayed in the browser.
5. To select a group of pupils, **highlight them** using either 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 and click the last name in the list.

6. Once the required pupils have been highlighted, click **Select** to add them to the **Students** panel.

2 Students										Remove
Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution		Clear
Adams, Sadie	6	6KH	001521	01/09/2016						
Andrews, Richard	6	6KH	001523	01/09/2016						
Bartram, Piers	6	6VC	001602	01/09/2017						
Bronislaw, Tomaz	6	6KH	001524	01/09/2016						
Brooks, Madison	6	6VC	001604	01/09/2017						
Clint, William	6	6VC	001605	01/09/2017						
Cummins, Jake	6	6VC	001606	01/09/2017						
Davey, Megan	6	6VC	001607	01/09/2017						

Manage Pupil(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving: 23/07/2024 Reason for leaving: End of phase transfer - Maintair Assign to All

Destination after Leaving: Green Abbey Secondary School Assign to Selected

Destination Institution: Green Abbey

Destination Expected Start Date: 01/09/2024 Grounds for Removal:

7. In **Panel 1: Leaving Information**, enter the **Date of Leaving** or click **Calendar** and select the required date.

8. Select the **Reason for leaving** from the drop-down list, eg. **End of Phase Transfer-Maintained School**.

9. Enter the **Destination after Leaving**.

If the school is outside of Bucks or to a school with a common name, enter details of the Town and/or County or DfE number in addition to the school's name.

For **End of Phase Y2 and Y6 Leavers**, if the **Destination after Leaving** is **not known**, enter **"TBC"**.

When the new school details are known, they can be updated in **Panel 11: School History**.

10. Open the **Destination Institution** and **Search** for the relevant school. Select **OK**.

11. **Destination Expected Start Date** will be **01/09/2025** for all pupils transferring to their **next phase school**.

12. **Grounds for Removal** not applicable for **End of Phase** pupils.

13. **Highlight the relevant pupils** using the **Ctrl** and **Shift** keys then clicking their names.

14. Click **Assign to Selected** or **Assign to All**.

2 Students										Remove
Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution		Clear
Adams, Sadie	6	6KH	001521	01/09/2016						
Alyona, Tatyana	6	6KH	001522	01/09/2016	23/07/2024	End of phase tran...	West Park ...	West Park Secon...		
Andrews, Richard	6	6KH	001523	01/09/2016						
Bartram, Piers	6	6VC	001602	01/09/2017						
Bennet, Eloise	6	6KH	001603	26/04/2021	23/07/2024	End of phase tran...	West Park ...	West Park Secon...		
Bronislaw, Tomaz	6	6KH	001524	01/09/2016						
Brooks, Madison	6	6VC	001604	01/09/2017						
Clarke, Harriette	6	6KH	001525	01/09/2016	23/07/2024	End of phase tran...	West Park ...	West Park Secon...		
Clint, William	6	6VC	001605	01/09/2017						
Cummins, Jake	6	6VC	001606	01/09/2017						

NOTE: It is recommended to **Save** each time you have assigned a destination to a selection of pupils.

15. **Repeat** until all pupils have leaving details assigned to them.

If an error has been made, highlight the pupil, correct the information in the **Leaving Information** panel then click **Assign to Selected**.

To remove a pupil from the list, highlight their name then click **Remove**.

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 **Clear**.

Re-enter the information as required.

16. Click **Save**. The selected pupils are recorded with a date of leaving on the date specified.

Manage Pupil(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving: 23/07/2024 Reason for leaving: End of phase transfer - Maintair Assign to All

Destination after Leaving: Green Abbey Secondary School Assign to Selected

Destination Institution: Green Abbey

Destination Expected Start Date: 01/09/2024 Grounds for Removal:

2 Students

Name	Year Group	Class	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution	
Adams, Sadie	6	6KH	001521	01/09/2016	23/07/2024	End of phase transfer - M...	Green Abbey Se...	Green Abbey	Remove Clear
Alyona, Tatyana	6	6KH	001522	01/09/2016	23/07/2024	End of phase transfer - M...	West Park Seco...	West Park Seco	
Andrews, Richard	6	6KH	001523	01/09/2016	23/07/2024	End of phase transfer - M...	Fairfield Second...	Fairfields Secon	
Bartram, Piers	6	6VC	001602	01/09/2017	23/07/2024	End of phase transfer - M...	Green Abbey Se...	Green Abbey	
Bennet, Eloise	6	6KH	001603	26/04/2021	23/07/2024	End of phase transfer - M...	West Park Seco...	West Park Seco	
Bronislaw, Tomaz	6	6KH	001524	01/09/2016	23/07/2024	End of phase transfer - M...	Green Abbey Se...	Green Abbey	
Brooks, Madison	6	6VC	001604	01/09/2017					
Clarke, Harriette	6	6KH	001525	01/09/2016	23/07/2024	End of phase transfer - M...	West Park Seco...	West Park Seco	
Clint, William	6	6VC	001605	01/09/2017	23/07/2024	End of phase transfer - M...	Fairfield Second...	Fairfields Secon	
Cummins, Jake	6	6VC	001606	01/09/2017	23/07/2024	End of phase transfer - M...	Green Abbey Se...	Green Abbey	

For pupils leaving at **End of Phase a “removal from roll notification form” is not required.**

Recording “Out of Phase” and “In Year Transfer” Leavers

Follow steps **1 – 16** above to record leavers not in **Yr 2** (Infant) or **Yr 6** (Junior/Primary) who are leaving school, with the following information:

- **Date of Leaving** enter the last day of summer term or other leaving date, as advised.
- **Reason for Leaving** as “In Year Transfer – Maintained School” (or other applicable reason).
- **Destination after Leaving** enter the new school, as advised.
- **Destination Expected Start Date** enter the date, as advised.
- **Grounds for Removal** select from the drop-down list.
- **CME guidance** states: Buckinghamshire Schools are required to complete a “removal from Roll Notification Form” for any pupil who leaves at a **non-transition point**.
- Refer to <https://schoolsweb.buckscc.gov.uk/behaviour-wellbeing/children-missing-education/>

Managing Leaver's Address Details in SIMS:

- Where pupils are leaving school and remaining at their current address **do not** enter an address end date on the pupil or family record.
- Where pupils are leaving school **and moving house**, schools are required to obtain a forwarding address (if applicable) and ensure the pupil's address, and any relevant family members addresses, are updated before the pupil is removed from the admission register.
- If a new address is **not known**, enter an **address end date** for the pupil ie. same day as leaving date. This information must be entered before a CTF is generated.

There may be occasions where a pupil's address is not shared due to:

- Safeguarding reasons
- The pupil has been located as out of county but the address is not known.
- The pupil has moved overseas.

In these circumstances:

- Enter the generic address as '**XX99 9XX** and **Street name** of '**Moved Out of County**' or '**Moved Overseas**'.
- **Untick** the 'Home address can be disclosed' and 'home address can be transferred' box in the contact address.

Note: PO Box Addresses can only be used for **parental contact addresses**, not a pupil.

Free School Meal Eligibility End Date

No requirement to put an end date.

Refer to guidance on **SchoolsWeb**:

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

<https://schoolsweb.buckinghamshire.gov.uk/school-management-support/free-school-meals/free-school-meal-eligibility-for-pupils-transferring-between-schools/>

Transitional protections apply from 1 April 2018, until the end of the 2025/26 school year. Pupils becoming eligible for free school meals under the benefits-based criteria in this time, **will continue to receive free meals until the end of the 2025/26 school year**.

This applies, regardless of any change in household circumstances, including an increase in earnings above the eligibility threshold.

From the start of the 2026/27 academic year, it is the Department for Education's intention that all protections will be discontinued, alongside an extension to the eligibility criteria for free school meals. From this point, households must meet the eligibility criteria to be entitled to free school meals.

Exporting Common Transfer Files (CTF)

Note: If schools request the CTF's before the end of the academic year, a further CTF will need to be resent, on completion of the academic year to ensure the full attendance and key stage results are included.

The law requires, as specified in the **Education (Pupil Information) (England) Regulations 2005**, that a CTF must be sent to the receiving school **no later than 15 days** after the day on which a pupil ceases to be registered at the "old" school but it can also be sent in advance particularly when pupils are moving from primary to secondary schools.

<https://schoolsweb.buckscc.gov.uk/school-management-support/common-transfer-file-ctf/>

- Ensure the relevant pupils are given a **Date of Leaving** before exporting the CTF.
- Check the required **Destination Schools** are in SIMS via: **Tools | Other Schools**

Create a CTF

1. Select **Routines | Data Out | CTF | Export CTF**.
2. Select **General** to display the **Export CTF** page.
3. In the **Data to be Exported** panel, ensure the check boxes relating to the data items you wish to export are selected. In most instances the default is acceptable.

Select the CTF export type..

Export Type

General

Phonics Test Results

KS1

KS1 excluding Tests and Tasks

KS2

Early Years Foundation Stage data (FSP)

CME - Leavers

CME - Joiners

Export CTF (General)

1 Data to be Exported 2 Student Options 3 Students 4 Exception Log

1 Data to be Exported

Student Basic Details ☒ Student Address ☒ Student Contacts ☒ Looked After ☒

SEN Information ☒ Assessment Data (Include KS1 Tasks/Tests) ☒ School History ☒

Attendance Summary ☒ Programme of Study(PoS) Assessments ☒ FSM History ☒

Select Cancel

NOTE: All schools exporting CTF's must ensure the **Assessment Data & Include KS1 Tasks/Tests** is ticked.

4. From the **View** drop-down list in the **Pupil Options** panel, select the **status** of the pupils you wish to include in the CTF file

2 Student Options

Effective Date View **Current students** Include students already exported ☒ Refresh Students

5. Tick **Include students already exported** box.
6. Click **Refresh Students** to update the list of pupils displayed based on your selections.
7. To change the display order, click any of the **column headings**.
8. In most circumstances, a single year group will be selected eg. Year 6. Selecting the required year from the **Year Grp** drop-down list as shown in the following graphic.

3 Students

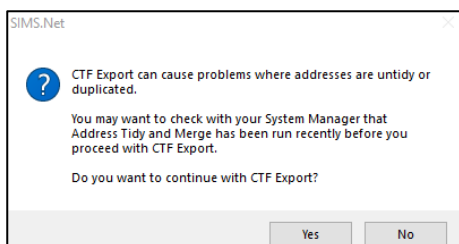
UPN	Preferred Surname	Preferred Forename	Reg G.	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
G823299915001	Adams	Nancy	6VC	6	6			
W823299915002	Alala	Candis	6VC	6	6			
U823299916021	Barden	Olivia	6KH	6	6			
H823299916022	Bateman	Vincent	6VC	6	6			
X823299916023	Bhati	Aini	6KH	6	6			
L823299916024	Boian	Claudiu	6KH	6	6			
A823299916025	Brown	Ingrid	6VC	6	6			
K823299915003	Broz	Konrad	6VC	6	6			
D823299915026	Cain	William	6VC	6	6	WATERS EDGE PRIMARY SCHOOL		
P823299916026	Cairns	Matthew	6VC	6	6			
D823299916027	Canzano	Michael	6VC	6	6			
Z823299915004	Carlton	Eleanor	6VC	6	6			

Year Grp = 6

9. Select the **Destination School or Destination LA/Other** 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 pupils, right-click anywhere in the table and click **Select All** from the pop-up menu.
10. Once multiple pupils have been selected, **left click** in the **Destination School** column for the last pupil highlighted.
11. Click the **drop-down** and select the **Destination School** for the selected pupils.

UPN	Preferred Surname	Preferred Forename	Reg G.	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
G823299915001	Adams	Nancy	6VC	6	6			
W823299915002	Alala	Candis	6VC	6	6			
U823299916021	Barden	Olivia	6KH	6	6			
H823299916022	Bateman	Vincent	6VC	6	6			
X823299916023	Bhati	Aini	6KH	6	6			
L823299916024	Boian	Claudiu	6KH	6	6			
A823299916025	Brown	Ingrid	6VC	6	6			
K823299915003	Broz	Konrad	6VC	6	6			
D823299915026	Cain	William	6VC	6	6		WATERS EDGE PRIMARY SCHOOL	
P823299916026	Cairns	Matthew	6VC	6	6			
D823299916027	Canzano	Michael	6VC	6	6			
Z823299915004	Carlton	Eleanor	6VC	6	6			

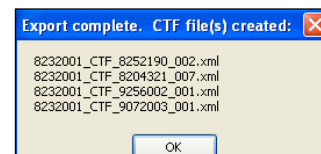
12. Once all pupils have the correct destination recorded, click **Export CTF** to create the export file(s).
13. An **Address Tidy Prompt** will appear on screen, select **Yes**.



14. A message will shortly be displayed on screen to confirm the file(s) has been created.

NOTE: If you have more than one destination selected, a CTF will be created for each destination school.

15. Note the **filename(s)**. You will need this information when you **upload** the CTF's to the **DfE s2s** website. Refer to guidance on **SchoolsWeb**.



16. 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.
17. Check the **Number of students in the file matches the Number of students processed**.

Note: any errors must be corrected before the pupil can be successfully included in the CTF export file.

UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
U820432109004	Allen	Bary	M	28/02/2003	Attendance data not exported as miss...	8234321_CTF_822LLLL_001
L820432109007	Beans	Lisa	F	18/06/2004	Attendance data not exported as miss...	8234321_CTF_822LLLL_001
A820432109010	Burnoughs	Anita	F	11/10/2003	No LEA number found for Greenacres...	8234321_CTF_822LLLL_001
A820432109010	Burnoughs	Anita	F	11/10/2003	No School Number found for Greenac...	8234321_CTF_822LLLL_001
A820432109010	Burnoughs	Anita	F	11/10/2003	No reason for leaving found for Green...	8234321_CTF_822LLLL_001
K820200102014	Chadwick	Stephanie	F	12/06/2005	Attendance data not exported as miss...	8234321_CTF_822LLLL_001
K820200102014	Chadwick	Stephanie	F	12/06/2005	No ENG Results exported since ther...	8234321_CTF_822LLLL_001
K820200102014	Chadwick	Stephanie	F	12/06/2005	No ENG Results exported since ther...	8234321_CTF_822LLLL_001

Chapter 5 Promotion into 2025/26 Pastoral Structure

Introduction

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 the case there are any exceptions.

It is recommended pupils are allocated to Registration Groups / Classes via the **Pastoral Structure** (refer to **Allocating Applicants to Registration Groups**).

Pastoral Promotion Procedure

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.**

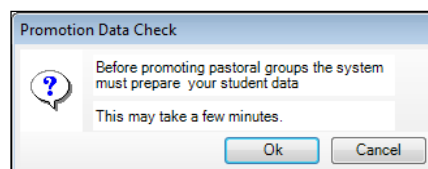
You can **repeat the process** a number of times until you are happy all pupils have been allocated to the appropriate registration groups.

BEFORE PROCEEDING: Check the following has been actioned:

- 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.

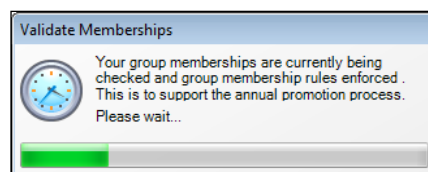
- Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog.

You are advised that pupil data needs to be prepared (all current group memberships are checked and confirmed).



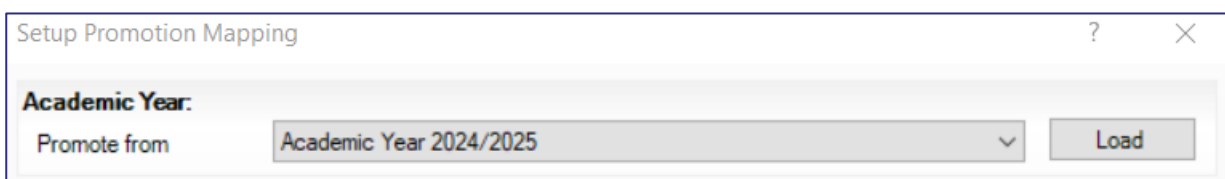
- Click **OK** to display the **Validate Memberships** message dialog, which shows the progress of the validation process (this process may take some time to complete).

The **Setup Promotion Mapping** dialog is displayed once the validation process is complete,.



- Promote from** the **current academic year** should be displayed automatically. If not, select from the drop-down list.

WARNING: Ensure you select the **correct academic year** otherwise any changes made will affect the wrong year and can be difficult to rectify.



- Click **Load**.

Setup Promotion Mapping from Academic Year 2024/2025

- **Year Group Panel** - you should not need to change anything in this panel.
- **Promotion Path** - Is populated with a default set of promotion paths where one year is promoted to the next ie. **Year 1 is promoted to Year 2** and so on.
- **Class Panel** displays a list of the classes for the current year, and a drop-down menu allows you to select the class for the next year.
- The **Registration Tutor** is the current tutor.
- If the tutor is being promoted along with the class, **tick** the box alongside. Otherwise, you do not need to change anything.
- The same can be done for **Other Supervisors**.

Setup Promotion Mapping from Academic Year 2024/2025

Academic Year:
Promote from: Academic Year 2024/2025 Load

Year Group

Year Group	Promotion Path
N2	R
R	1
1	2
2	3
3	4

Override membership ☒ Set Default

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year N2	AM		Mrs Rebecca Lorrin	☐	☐
Year N2	PM		Ms Lisa Lawson	☐	☐
Year R/Yea...	ASH	2JB	Miss Amelia Kent	☐	☐
Year R/Yea...	ELM	2JB	Mr Richard Perrin	☐	☐
Year R/Yea...	OAK	2GH	Miss Shirley Fortune	☐	☐
Year R/Yea...	PINE	2GH	Mr Oliver Jovner	☐	☐

Override membership ☒ Finish

5. In the **Class** panel, review the promotion path for each class. Move down one class at a time by clicking in the **Registration Group** column and select the class to which the pupils will be promoted from the **Promotion Path** column drop-down list. **Repeat this process** for **all** classes.
6. If **mixed year group classes** are promoting to different classes, or a class is splitting into two classes, leave the **Promotion Path** blank and assign pupils to the correct class.

Refer to **Chapter 6 – Allocating On Roll Pupils to Registration Groups**.

It is ok to have some classes with a Promotion Path, and some not.

7. 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 any existing memberships (however they were defined) are overwritten.

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

8. Click **Finish** and **Save** the settings to move to the **Promote pastoral groups** screen.
- **NOTE:** Pre-admissions applicants will not show here.
 - Their class allocation is covered in **Allocating Applicants to Registration Groups/Classes**.
 - The **Promote pastoral groups** page lists the current year groups.
 - Click **Map** on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.
9. SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

Promote pastoral groups						
Save Map Filter Customize						
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group	
+ 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						
Adams, Sadie	☐	5	6	5DT	6VC	
Akeman, Richard	☐	5	6	5BB	6KH	
Akeman, Steven	☐	5	6	5DT	6VC	

Setting the Promotion Path for Individual Pupils

This can be used, for example, if a current Y2 pupil is being held back academically eg. chronological year group Y3 but will be taught in NC Year 2 for the 2025/26 academic year.

10. **Double-click** the **current year group** for which you want to view or set individual promotion paths.

Promote pastoral groups								
Save Map Filter Customize								
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group	Current National Curriculum Year	Next National Curriculum Year	
+ Next Year Group:								
+ Next Year Group: R								
+ Next Year Group: 1								
Clifton, Rhianna	☐	R	1	PINE	OAK	R	1	
Mazur, Aurelia	☒	R	1	ELM	ASH	R		R
Sinowski, Elzbieta	☐	R	1	PINE	OAK	R		Short Name
Adkins, Eve	☐	R	1	ELM	ASH	R		N2
Hua, Leng	☐	R	1	ELM	ASH	R		1
Maxwell, Jake	☐	R	1	PINE	OAK	R		2
Henson, Tameka	☐	R	1	PINE	OAK	R		3
Dickinson, Adam	☐	R	1	ELM	ASH	R		4
Cardale, Luke	☐	R	1	ELM	ASH	R		5
								6
								x

11. Once expanded, you can change the year or registration group for individual pupils by clicking in the appropriate column and selecting a different year or registration group from the drop-down list.

12. The change appears in red and the **Unusual** check box is selected automatically to indicate the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog).
13. Click **Save** to save the promotion mappings. The promotion occurs at the beginning of the next academic year.
14. A warning is displayed if any **unusual promotions** have been set.
15. Click **Yes** to accept the warning.

Chapter 6 Editing, Updating & Checking On Roll Pupils Registration Groups

Introduction

This chapter explains how to allocate, change or update on roll pupils to the next years registration groups. This will enable the printing of registers prior to the start of the academic year.

Allocating / Checking On Roll Pupils in the Pastoral Structure

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.
2. Ensure the **Effective Date** is **01/09/2025** and click **Go**.

The **Effective Date** defaults to the start date of the next academic year ie. **01/09/2025**.

For pupil's already on roll and being promoted to their next year group eg. Year 3 moving to Year 4, this date **MUST** be used to allocate or edit reg group membership.

3. **Right-click** on **Registration Group**
4. Select **Members** to display the **Allocate Students/Applicants** dialog.

Allocate Students/Applicants : Year 3

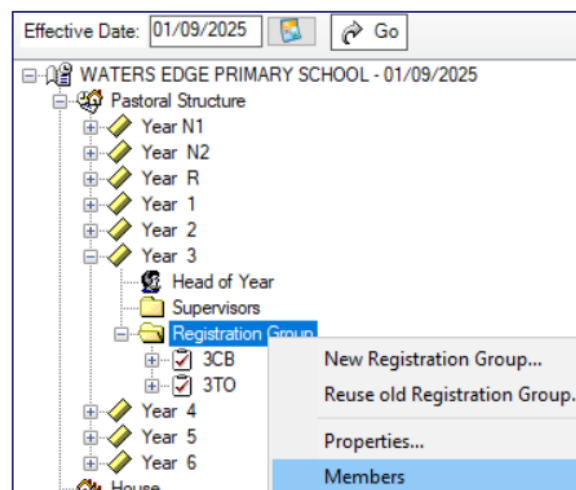
Effective Date Range
☒ From effective date to end of the academic year () ☐ Over the whole academic year (01/09/2025 - 31/08/2026)

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

Members

Name	Gender	Year Group	Reg Group	3CB	3TO
Atkins, Eno	Female	Year 3	3TO		✓
Balan, Larisa	Female	Year 3	3CB	✓	
Bartek, Filip	Male	Year 3	3CB	✓	
Birkett, Scott	Male	Year 3	3TO		✓
Brooks, Willow	Female	Year 3	3CB	✓	
Byron, Emma	Female	Year 3	3TO		✓
Cardale, Luke	Male	Year 3	3TO		✓
Carmichael, Meghan	Female	Year 3	3CB	✓	
Chatterjee, Anisha	Female	Year 3	3CB	✓	
Cioabanu, Mitica	Male	Year 3	3CB	✓	
Clifton, Rhianna	Female	Year 3	3CB	✓	
Total				31	29

OK Cancel



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

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

SIMS Allocate Students/Applicants : Year 3

Effective Date Range
☒ From effective date to end of the academic year () ☐ Over the whole academic year (01/09/2025 - 31/08/2026)

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

- **Students** – select 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 to display any applicants who have an application status of **Accepted**. These applicants are displayed with a pink background.
- **Current Applications** – select to display any applicants who have an application status of **Applied, Offered or Reserved**. These applicants are displayed with an orange background.

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

This routine is carried out once the new academic year has started.

Additional columns of information can be added to the grid by clicking **Actions** eg. Date of Birth.

Members						Print	Actions
Name	Gender	Year Group	Reg Group	ASH	OAK		☒ Gender ☒ Year ☒ Reg ☐ House ☐ Ethnicity ☐ Previous School ☐ Admission no. ☒ Date of Birth ☐ View Single ☐ View Triple
Adesina, Kyra	Female	Year 1	ASH	✓			
Barnes, Luke	Male	Year 1	OAK		✓		
Beinon, Rhys	Male	Year 1	ASH	✓			
Blake, Antony	Male	Year 1	OAK		✓		
Bradley-Shaw, Alice	Female	Year 1	ASH	✓			
Bronislaw, Natalia	Female	Year 1	OAK		✓		
Callaghan, Catherine	Female	Year 1	ASH	✓			
Carlston, Eliza	Female	Year 1	OAK		✓		

5. Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Click the cell again to remove the tick.
6. Once you have selected classes for each applicant, click **OK** to **Save** the changes.

Chapter 7 Printing Class Lists and Registers for the New Academic Year

Introduction

Once you have carried out the preceding routines, it is possible to print out Class Lists and Registers (if required) for the new academic year.

Printing Class (Registration Group) Lists

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

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

Focus	Name	Focus
Student	Reception Induction 2015 Inhouse v2	Student
Staff	Record Card	Student
Class	Record Sheet	Student
Aspect	Record Sheet 1	Student
Contact	Recoupment	Student
Group	Registration Groups	Student
Category	Registration Groups (Dated DOB Sort)	Student
Template	Registration Groups (Dated Gender Sort)	Student
Gradeset	Registration Groups (Dated with Columns)	Student
Resultset	Registration Groups (Dated)	Student
OMR Template		
Result		

1. Select **Reports | Run Report** to display the **Report** browser.
2. Expand the **Student** focus. Double-click the required report, eg. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.
3. **Deselect** the **Bypass effective date** check box.
4. **Supply Effective Date** enter the required date:

01/09/2025 will not include Applicants.

Applicant date of admission eg. 04/09/2025 will include applicants.

Enter parameter values for report

Supply Effective date

☐ Bypass effective date (Use Today)

Select Year Group(s)

Select All
Clear All

☒ Year N1
☐ Year N2
☐ Year R1
☐ Year 1
☐ Year 2

☐ Accept All (bypass filter condition)

☐ Show All

Select Registration Group(s)

Select All
Clear All

☒ N1 AM
☐ AM
☐ PM
☐ ELM
☐ PINE

☐ Accept All (bypass filter condition)

☐ Show All

OK
Cancel

The first day of the new academic year, will not include any Applicants.

Enter parameter values for report

Supply Effective date

☐ Bypass effective date (Use Today)

Select the date of admission for new applicants to include in the reports.

5. Select the required **Year Group(s)** and **Registration Group(s)**.
6. Click **OK** to produce the required report.

Printing Manual Entry Registration Sheets

1. Select **Reports | Attendance | Manual Entry | Print Registration Sheets**.
2. Select **From w/b 01/09/2025** to **w/b 01/09/2025**.
3. Change **Group Type** to **Reg Group**
4. Tick **Include accepted applicants**.

NOTE: Only applicant records with a status of **Accepted**, will show on this report.

5. Click **Search**.
6. Click **Select All**.
7. Click **Print**.

The screenshot shows the 'Manual Entry Register' window. At the top, there are 'Search' and 'Print' buttons. Below these, there are date pickers for 'From w/b' and 'to w/b', both set to '01/09/2025'. A 'Title' field contains 'Manual Entry Register'. To the right, the 'Group Type' dropdown is set to 'Reg Group'. Below this, there are three checkboxes: 'Include accepted applicants' (checked and circled in red), 'Include Existing Marks' (checked), and 'Display Attendance Codes' (unchecked). At the bottom, there is a table with two columns: 'Short Name' and 'Description'.

Short Name	Description
2GH	2GH
2JB	2JB
3CB	3CB
3TO	3TO
4ES	4ES
4SL	4SL
5BB	5BB
5DT	5DT
6KH	6KH
6VC	6VC

Show Applicants at Take Register Set-Up

If no applicants are showing on the registers, go to:

1. **Tools | Setups | Attendance Setup | Module Setup**
2. Go to: **Panel 5: Visibility Switches**
3. Ensure the **Show Applicants at Take Register** box is ticked.
4. **Save**.

Chapter 8 Other SIMS Module Processes

Introduction

It is recommended the following processes are carried out before the start of the new academic year either towards the end of term or during the school holidays

Finalising Attendance Data for 2024/2025

It is essential all attendance data for the Academic Year is accurate and up to date

Missing Marks (-)

1. **Focus | Attendance | Deal with Missing Marks**
2. Enter **date ranges** and change **Group Type** to **Whole School**
3. Click **Search** and **Open**
4. Resolve any missing marks.

Unexplained Absences (N Codes)

1. **Focus | Attendance | Deal with Unexplained Absences**
2. Enter **date ranges** and change select **Group Type** to **Whole School**
3. Click **Search** and **Open**
4. Resolve any Unexplained Absences

All missing marks and unexplained absences should be actioned, ideally before the end of the Academic Year.

Adding/Removing Users for SIMS Online Services Products

If not already actioned during the Summer Holidays, these instructions are repeated for users of SIMS Online Services products only (eg. SIMS Parent, Options Online).

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

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

- Invite staff members joining the school. Staff members joining the school will not show in the portal until their employment start date.
- Invite pupils joining the school.
- Invite parents of pupils joining the school. They will not be able to see their child's data until after the date of admission.

NOTE: *Invitations are valid for 90 days from the date they are sent out.*

*Parents of pupils who are **accepted** applicants can register to use SIMS Online Services. However, they are not able to access Data Collection functionality until their child is on roll.*

For more information, refer to the **Help Centre** via the **SIMS Parent for Schools** Documentation Centre.

Chapter 9 Admitting Pupils in the New Academic Year

Introduction

After the start of the new academic year, there are routines which **MUST** be completed. **DO NOT** process any of these before the start of the new academic year.

SIMS Database Maintenance Checks

It is important the following processes must be carried out on or after the start date of the new academic year to prevent SIMS from crashing.

Validate Memberships

Go to: **Tools | Validate Memberships**

Database Diagnostics

Go to: **Tools | Systems Diagnostics | Database Diagnostics** and select **Run**.

If you are unable to see these routines in SIMS, this will be due to restrictions to your SIMS permissions.

It is recommended these routines are run when all users are logged out of SIMS as these can be long processes.

Admitting Applicants

DfE Guidance - Expected First Day of Attendance

<https://www.gov.uk/government/publications/working-together-to-improve-school-attendance>

143. Schools must enter pupils on the admission register at the beginning of the **first** day on which the school has agreed with, or been notified by the parents, that the pupil will attend the school.

145. If a pupil fails to attend school on the agreed starting day, the school must follow this up and try to establish the reason for absence.

Note: DO NOT admit pupils with a **future admission date**.

Pupils with a future admission date results in conflicts of data between the current and future schools on B2B, in addition to having to delete the record if the pupil accepts a place at another school.

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

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2025/2026 - Autumn Year N2	2025/2026	Autumn	Year N2	30	Active
2025/2026 - Autumn Year R	2025/2026	Autumn	Year R	60	Active

3. The **Summary** panel displays read-only statistics about the selected intake group.

Admit Applicant Detail: 2025/2026 - Autumn Year R

Save Undo Print

1 Summary 2 Applications

1 Summary

Total Applicants	5	Accepted	0
Planned Admission	60	Withdrawn	0
Applied	0	Rejected	0
Offered	5	Admitted	0

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

2 Applications

Application Status: Accepted

Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Barden, Olivia	Female	14/02/2012	01/09/2016	Single Registration	Accepted		No Change		
Bateman, Vincent	Male	20/01/2012	01/09/2016	Single Registration	Accepted		No Change		
Bhati, Aini	Female	17/04/2012	01/09/2016	Single Registration	Accepted		No Change		

4. Click **Assign Permanent UPN** if required.

The **Assign UPN** column is populated with **Assign Permanent UPN**, as shown in the following graphic.

5. **Permanent UPNs** are issued to **new applicants** only when it is believed they have never previously been allocated a UPN.
6. To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, eg. **No Change** (if the applicant already has a UPN).

2 Applications

Application Status: Accepted

Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Barden, Olivia	Female	14/02/2012	01/09/2016	Single Registration	Accepted		No Change		
Bateman, Vincent	Male	20/01/2012	01/09/2016	Single Registration	Accepted		Assign Permanent UPN		
Bhati, Aini	Female	17/04/2012	01/09/2016	Single Registration	Accepted		Assign Temporary UPN		

UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs.

If they are not generated here, allocate UPN's on an individual basis via the Pupil's Record.

Any known existing UPNs can be entered in the Basic Details panel via **Focus | Admission | Applicant**.

Withdrawal applicants at this point before admitting.

This prevents pupils who did not start or any duplicate records (ie. pupils already on roll in N2 but also included in ATF for Reception) admitted and put on roll.

If you intend to admit all applicants in the selected intake group, click **Admit All**.

Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit.

The most effective method is to click **Admit All** and edit any exceptions.

2 Applications

Application Status
Accepted

Assign Permanent UPN
Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Barden, Olivia	Female	14/02/2012	01/09/2016	Single Registration	Accepted		Assign Permanent...		
Bateman, Vincent	Male	20/01/2012	01/09/2016	Single Registration	Admitted		Assign Permanent...	✓	
Bhat, Aini	Female	17/04/2012	01/09/2016	Single Registration	Admitted		Assign Permanent...	✓	

- Once complete, click **Save** 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.

Chapter 10 Further Routines To Be Carried Out

Re-admitting Pupils

Any pupils, not part of the admissions process, who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures the pupil's educational **History** is maintained.

IMPORTANT: It is essential that you follow the process for re-admissions (ie. 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, ie. 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 (eg. if the pupil leaves in July but returns in September).

If you do not want any gaps in the associated class memberships, then you must **edit the history** via **Focus | Pupil | Pupil Details** page and click **History** on the **Registration** panel.

1. Select **Focus | Pupil | Pupil Details** to display the **Pupil Details** page.

2. Click **New** to display the **Add Pupil** page.

3. Enter the pupil's known details into the **Basic Details** panel then click **Continue**.

4. A list of **Matched People** matching the search criteria entered is displayed.

5. **Highlight** the required pupil and click **Open** to display a warning message *The selected pupil is a leaver, do you want to re-admit the Pupil?*

Full name	Gender	Roles	Address
Browne, Lettie	Female	Student, Applicant	12, Humber Way, Bletchley...

6. If you are certain that this is the pupil who should be re-admitted, click **Yes**.

7. Add/edit further details as required, then click **Save**. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil's details.

8. Click **Save** again if any additional data has been added.

The Official Register for 2024-25

Refer to the **latest DfE statutory guidance** [Working together to improve school attendance \(applies from 19 August 2024\)](#)

The Official Register is a statutory requirement.

The official attendance registers should be kept electronically.

Before saving the official register, missing marks and unexplained absences must be actioned and resolved.

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the Official Register Report page.
2. Enter the required dates and click **Search**.
3. Select the **Group Type** eg. Whole School.
4. Click **Print** to produce the required reports where a **Run a Screen Based Report** will display.
5. Choose the **Layout Options** and **Output Options** for the file. Select **OK**.

The screenshot shows the 'Official Register Report' window. At the top, there are search filters: 'From' (01/09/2024), 'to' (22/07/2025), and 'Title' (Official Register). The 'Group Type' is set to 'Whole School'. There are checkboxes for 'Show Totals', 'Show Key to Codes', 'Show History of Changes', and 'Include changes from "N" mark'. Below these is a table with columns 'Short Name', 'Description', and 'Group Type', containing one row: 'Whole School Selected'. At the bottom are 'Select All' and 'Deselect All' buttons. A modal window titled 'Run a Screen Based Report' is open, showing 'Layout Options' (radio buttons for 'Use a predefined layout' (selected), 'Supply your own layout', and 'Output raw XML') and 'Output Options' (radio buttons for 'Output to a web browser' (selected) and 'Output to a file'). 'OK' and 'Cancel' buttons are at the bottom of the modal.

Using the Part-Time Pupils Routine to Add 'Not Required' Codes

If you have no part time pupils, please proceed to **Housekeeping Routines in SIMS**.

1. Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.
2. Enter the date range appropriate to the period for which your chosen group will be part time.

The dates must lie within the academic year.

NOTE: It is recommended to add the **not required codes** over a maximum of one term at a time, rather than the whole academic year.

The screenshot shows the 'Part Time Pupils' window. At the top, there are search filters: 'From w/b' (04/09/2025), 'to w/b' (20/07/2026), and 'Group Type' (Part Time Group). Below these is a table with columns 'Short Name' and 'Description', containing two rows: 'AM' (AM only) and 'PM' (PM only). At the bottom are 'Select All' and 'Deselect All' buttons. Below the table is a section titled 'Enter "Not Required" codes' with radio buttons for 'Attendance required in mornings only' (selected), 'Attendance required in afternoons only', 'Attendance required all day', and 'Apply a weekly pattern of Not Required codes'. At the bottom is a grid of checkboxes for each day of the week, split into AM and PM: Mon AM, Mon PM, Tue AM, Tue PM, Wed AM, Wed PM, Thu AM, Thu PM, Fri AM, Fri PM.

3. **Highlight** the required group(s).
4. Specify when attendance is **required** by selecting one of the radio buttons:
 - Attendance required in mornings only
 - Attendance required in afternoons only
 - Attendance required all day

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
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

5. 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

1. 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.
2. In the following example, the pupils are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day Wednesday.

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
☐	☒	☐	☒	☐	☐	☐	☒	☐	☒

3. Existing marks can be protected or overwritten. This is achieved by clicking **Preserve** or **Overwrite**.



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

NOTE: If **Overwrite** is selected, SIMS saves the specified pattern of marks (overwriting any existing marks), for all sessions in the selected range of weeks.
IT DOES NOT OVERWRITE ANY EXISTING **NOT REQUIRED CODES** (X) IN A PUPIL'S ATTENDANCE.
The original Not Required Code must be removed first in Edit Marks and overwritten with – (no mark).
Once this has been completed, re-run the Part Time Pupil routine.

Enter Part-Time Pupils End Dates

This is mostly relevant to Nursery schools (or schools with nursery age children).

Part-time pupils moving to full time education must have an **end date** on their **Part-Time Details** panel.

NOTE: Part time pupils data is collected in the termly school census returns.

Full-time pupils should have their **Attendance Mode** changed to **All Day**. **Note:** this information does not pull through in the school census returns.

1. Select **Focus | Pupil | Pupil Details** and select the required pupil from the **Find Pupil** browser.
2. Click the **Registration** hyperlink to display the **Registration** panel.
3. In the **Part Time Details** panel, click **Open** to display the **Edit Part-time Attendance** dialog.
4. Check or amend the **End Date** for part-time pupils who will no longer be part-time in September.
5. Click **OK** and **Save**.

We recommend recording an **Early Years Attendance Pattern** (refer to **Appendix D – Setting up and Defining Early Years Provisions**).

Updating the 'Selected Academic Year' on the Home Page

The Academic Year on the Home Page does NOT automatically update when the next Academic Year 'rolls over'. This is a manual routine, and if not updated, may affect some functionality in SIMS.

Note: Every workstation must be updated individually.

1. SIMS Home Page click **'Selected Academic Year 2024/2025'** to open a 'Select Academic Year' window.

2. Highlight **Academic Year 2024/2025** and click **OK**.

3. Click **OK** on the warning message and return to the Home Page.
4. The **Selected Academic Year** on the Home Page should now read **2025/2026**.

Import CTF's for New Pupils

Ensure you have received and imported a CTF for all new pupils on roll from their previous schools.
Refer to **page 17**.

Export CTF's for Leavers

Ensure a CTF has been sent for all leavers from your school to their destination (ie. new school or LA).
Refer to **page 40**.

Further guidance is available from:

<https://schoolsweb.buckscc.gov.uk/school-management-support/common-transfer-file-ctf/>

Housekeeping Routines in SIMS

General housekeeping routines should be run in SIMS to check every record held in SIMS against its specific validation checks.

Refer to the latest guidance **Data Cleansing and GDPR Housekeeping Routines in SIMS** available on ICT Zone
<https://schoolsweb.buckscc.gov.uk/ict-zone/schools-mis-team/sims-guidance-notes/>

Reset Parental Ballot Flags and Update Mailing Point

1. Select **Tools | Housekeeping | General**
2. **Reset Parental Ballot Flags** panel click **Apply**.
3. **Update Mailing Point** panel select either **Oldest Child** or **Youngest Child** and click **Apply**.

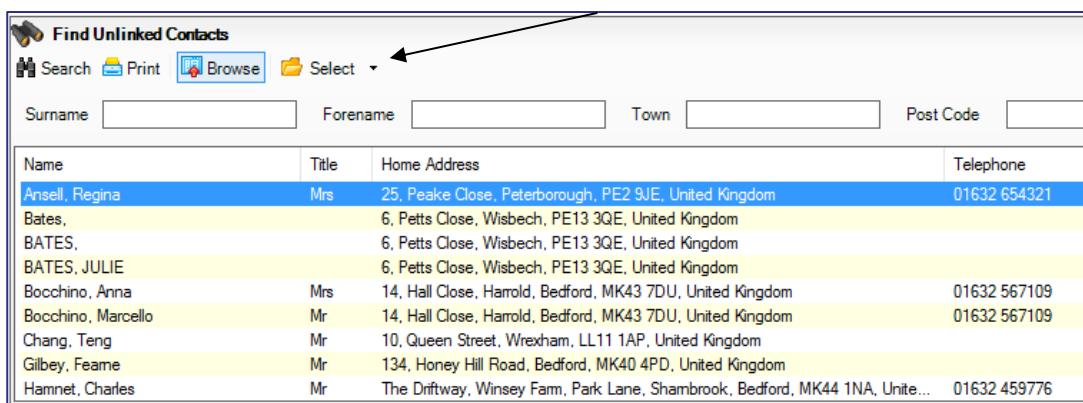
The screenshot shows the 'Housekeeping' menu in SIMS with three sub-menus: '1 Name Format', '2 Reset Parental Ballot Flags', and '3 Update Mailing Point'. The '1 Name Format' panel is active, showing options to apply formatting to Students / Applicants, Staff, Contacts, and Agents. It includes radio buttons for 'UPPERCASE' and 'Title Case' for Surname, Forename, and Middle Name(s). An example shows 'Peter John O'Malley-Smith' being formatted. The '2 Reset Parental Ballot Flags' panel has an 'Effective Date' of 01/09/2022 and a checkbox for 'Include accepted pre-admission students due to be on roll on the effective date?'. The '3 Update Mailing Point' panel has an 'Effective Date' of 01/09/2022 and a dropdown menu for 'Mailing Point' set to 'Oldest Child'.

NOTE: The **Update Mailing Point** routine does not recognise which out of twins or triplets is the eldest/youngest and marks them all as the mailing point.

To resolve, open one of their pupil records, **Panel 5 Family/Home** and **remove the tick** from Mailing Point for required pupils, until only one child in the family has mailing point ticked.

Delete Unlinked Contacts

1. This routine identifies any records in your database not linked to Pupil, Applicant or Personnel records. These unlinked contact records can be deleted.
2. Select **Tools | Housekeeping | Delete Unlinked Contacts**.
3. Click **Search**.
4. Click the drop down arrow by **Select** and **Select All**.



Find Unlinked Contacts

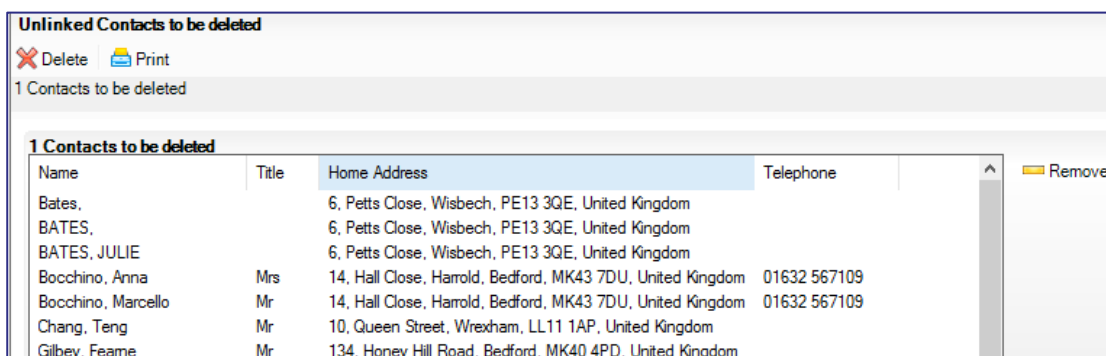
Search Print Browse Select

Surname: Forename: Town: Post Code:

Name	Title	Home Address	Telephone
Ansell, Regina	Mrs	25, Peake Close, Peterborough, PE2 9JE, United Kingdom	01632 654321
Bates,		6, Petts Close, Wisbech, PE13 3QE, United Kingdom	
BATES,		6, Petts Close, Wisbech, PE13 3QE, United Kingdom	
BATES, JULIE		6, Petts Close, Wisbech, PE13 3QE, United Kingdom	
Bocchino, Anna	Mrs	14, Hall Close, Harrold, Bedford, MK43 7DU, United Kingdom	01632 567109
Bocchino, Marcello	Mr	14, Hall Close, Harrold, Bedford, MK43 7DU, United Kingdom	01632 567109
Chang, Teng	Mr	10, Queen Street, Wrexham, LL11 1AP, United Kingdom	
Gilbey, Feame	Mr	134, Honey Hill Road, Bedford, MK40 4PD, United Kingdom	
Hamnet, Charles	Mr	The Driftway, Winsey Farm, Park Lane, Sharnbrook, Bedford, MK44 1NA, United Kingdom	01632 459776

5. This will populate the **Unlinked Contacts to be deleted** window.
6. Click **Delete** to delete all **Unlinked Contacts**.

It is recommended to delete a maximum of 12 records at any one time to prevent the database timing out.



Unlinked Contacts to be deleted

Delete Print

1 Contacts to be deleted

1 Contacts to be deleted

Name	Title	Home Address	Telephone
Bates,		6, Petts Close, Wisbech, PE13 3QE, United Kingdom	
BATES,		6, Petts Close, Wisbech, PE13 3QE, United Kingdom	
BATES, JULIE		6, Petts Close, Wisbech, PE13 3QE, United Kingdom	
Bocchino, Anna	Mrs	14, Hall Close, Harrold, Bedford, MK43 7DU, United Kingdom	01632 567109
Bocchino, Marcello	Mr	14, Hall Close, Harrold, Bedford, MK43 7DU, United Kingdom	01632 567109
Chang, Teng	Mr	10, Queen Street, Wrexham, LL11 1AP, United Kingdom	
Gilbey, Feame	Mr	134, Honey Hill Road, Bedford, MK40 4PD, United Kingdom	

Remove

Update Parental Salutation/Addressee

1. Select **Routines | Pupil | Update Parental Salutation/Addressee**.
2. Click **Search**.
3. Click the drop-down arrow by **Select** and **Select All**.
4. This will populate the Generate Parental Salutation and Parental Addressee Information panel.
5. Tick **Update Parental Salutation** and **Update Parental Addressee**.

Generate Parental Salutation and Parental Addressee Information

Save Generate

1 Options 2 Overwrite Options 3 Students

1 Options
☐ Update Parental Salutation
☐ Update Parental Addressee

2 Overwrite Options
☐ Overwrite any existing Information for the selected students

3 Students

Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Change	Remove
Aaron, Chris	Mr and Mrs Aaron	No	No	Mr and Mrs J Aaron	No	No	
Aaron, Liz	Mr and Mrs Aaron	No	No	Mr and Mrs J Aaron	No	No	
Aaron, Sophie	Mr and Mrs Aaron	No	No	Mr and Mrs J Aaron	No	No	
Abdullah, Tamwar	Mr and Mrs Abdullah	No	No	Mr and Mrs U Abdullah	No	No	
Abhra, Abijt	Mr and Mrs Abhra	No	No	Mr and Mrs P Abhra	No	No	
Abhra, Alisha	Mr and Mrs Abhra	No	No	Mr and Mrs P Abhra	No	No	
Abhra, Neel	Mr and Mrs Abhra	No	No	Mr and Mrs P Abhra	No	No	
Abhra, Shaquib	Mr and Mrs Abhra	No	No	Mr and Mrs P Abhra	No	No	
Ackton, Stan	Mr and Mrs Ackton	No	No	Mr and Mrs R Ackton	No	No	
Ackton, Stephen	Mr and Mrs Ackton	No	No	Mr and Mrs R Ackton	No	No	
Adams, Laura	Mr and Mrs Adams	No	No	Mr and Mrs P Adams	No	No	
Adams, Nancy	Mr and Mrs Adams	No	No	Mr and Mrs P Adams	No	No	
Adams, Sadie	Ms Adams	No	No	Ms C Adams	No	No	
Adasheji, Mohammed	Mr and Mrs Adasheji	No	No	Mr and Mrs T Adasheji	No	No	
Akeman, Rebecca	Dr and Mrs Akeman	No	No	Dr and Mrs S Akeman	No	No	
Akeman, Richard	Dr and Mrs Akeman	No	No	Dr and Mrs S Akeman	No	No	
Akeman, Steven	Dr and Mrs Akeman	No	No	Dr and Mrs S Akeman	No	No	
Alala, Candis	Mr and Mrs Alala	No	No	Mr and Mrs J Alala	No	No	
Alamillo, Sofia	Mr and Mrs Alamillo	No	No	Mr and Mrs M Alamillo	No	No	

6. **Overwrite Options** tick **Overwrite any existing Information for the selected students** unless you have existing information you do not wish to overwrite.

7. Click **Generate**.

3 Students							
Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Change	Remove
Bocetti, Mateo	Mr Bocetti and Mrs K...	Mr and Mrs Bocetti	Yes	Mr R Bocetti and Mrs ...	Mr and Mrs R Bocetti	Yes	
Carlston, Jack	Ms Carlston	Ms Mills	Yes	Ms W Carlston	Ms W Mills	Yes	
Conway, Luisa	Ms Conway	Ms Stanton	Yes	Ms F Conway	Ms F Stanton	Yes	
Flint, Bradley		Mr and Mrs Flint	Yes		Mr and Mrs J Flint	Yes	
Hamble, William	Miss Masters	Miss Hamble	Yes	Miss K Masters	Miss K Hamble	Yes	
Heled, Jac		Mr and Mrs Heled	Yes		Mr and Mrs G Heled	Yes	
Hellerton, Brooke	Mr Hellerton and Mrs ...	Mr and Ms Smith	Yes	Mr C Hellerton and Mr...	Mr and Ms C Smith	Yes	
Kalinski, Oliwia	Mrs and Mr Kalinski	Mr and Mrs Kalinski	Yes	Mrs and Mr A Kalinski	Mr and Mrs A Kalinski	Yes	
Kaurs, Safia	Mr and Mrs Kaurs	Dr and Mrs Kaurs	Yes	Mr and Mrs T Kaurs	Dr and Mrs T Kaurs	Yes	
Khans, Mariam	Mr and Khans	Mr Khans	Yes	Mr and A Khans	Mr A Khans	Yes	
Limani, Stephen	Mr and Mrs Imani	Mr and Mrs Limani	Yes	Mr and Mrs P Imani	Mr and Mrs P Limani	Yes	
Ludovak, Marika	Mr Ludovak and Mrs ...	Mr and Mrs Ludovak	Yes	Mr D Ludovak and Mr...	Mr and Mrs D Ludovak	Yes	

8. **Save** the changes.

Records may not generate a salutation and addressee for a variety of reasons:

- The relationship between the contacts and the pupil is not mother or father.
Step-parent or **foster parent** relationships **will not** generate a salutation and addressee.
- In this instance you will need to manually enter the salutation and addressee on the pupil record via **Focus | Pupil | Pupil Details | Panel 5: Family/Home** and type the salutation and addressee.
- One parent does not live with the child.
- In this instance the database is performing as expected. A salutation and addressee will not be generated to include a parent who does not live with the pupil.

Missing Parental House Icon

5 Family/Home

Contacts

Priority	Name	Relationship	Court Order	Telephone	Location
1	Mrs Nilesh Abhra	Mother		01632 776110	H
2	Mr Pari Abhra	Father		01632 776110	H

New Open Delete Copy Clone

The parental contact does not have a House icon on the pupil record but does live with the pupil. In the example, the Mother has a House icon but the Father does not.

In this instance further investigation is required. There may be a duplicate address in the database.

Pupil Premium Indicator (Bulk Update) for 2025/26 Academic Year

The **Pupil Premium Indicator** for the 2024/25 will be removed at the start of the 2025/26 academic year. It can be re-populated via two methods:

1. **Routines | Pupil | Bulk Update | Bulk Update Students**
2. **Student Population Panel:** Select the relevant **Group Type, Group, Effective Date** (of pupils on roll)
3. **Update Data Item Panel:** Select the **Data Item** of **Pupil Premium Indicator** and **Effective Date**
4. Select **Search**.
5. Tick the relevant pupils.
6. Select **Save**.

OR import the Pupil Premium Import to bulk update. This is released in March & October.

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

1. **DfE Get Information About Pupils | Data Downloads**.
2. Download the **Pupil Premium Report** and **save as a .csv file**.
3. Import into SIMS via: **Tools | Pupil Premium | Import**

Note: This will not include any new pupils starting in September or those who joined your school after the January census.

Enter the Pupil Premium Indicator manually.

Appendix A Recording Changes to Teaching Staff in Personnel

Introduction

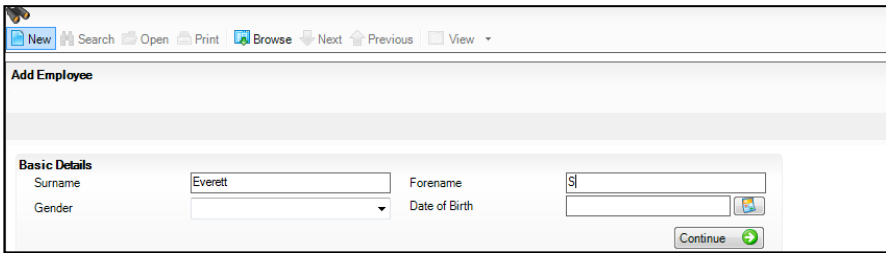
The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated leaving dates

NOTE: An Employment History can have a future Date of Leaving ie. an employee that is leaving at the end of term. An employee can also have a subsequent Employment History, but this cannot be created until after the previous Employment History Date of Leaving.

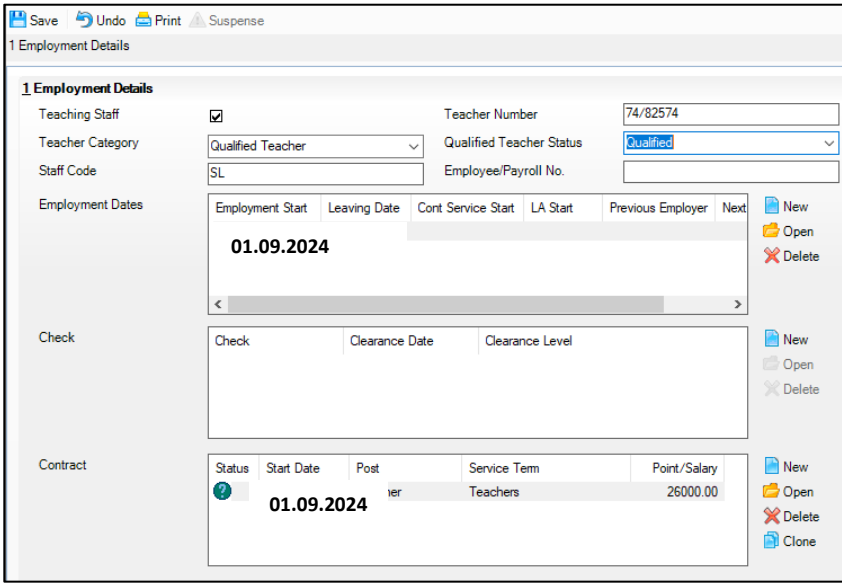
Adding New Teachers in Personnel

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known.

- 1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
- 2. Click **New** to display the **Add Employee** page. Enter the **Surname**, and initial of **Forename**.



- 3. Click **Continue**. SIMS checks to see if the member of staff already exists. If no entry exists, the **Staff Details** page is populated with the data just entered.
- 4. Click the **Employment Details** hyperlink to display the **Employment Details** panel.
- 5. Select the **Teaching Staff** check box for all teaching staff.
- 6. 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 statutory returns and available to assign to Reg Groups.

7. Select the required **Teacher Category** (eg. **Qualified Teacher**) from the drop-down list.
8. Enter a unique **Staff Code** of up to three characters if required.
9. Enter a **Teacher Number** if required, which must be in the format NN/NNNNN, where N represents a number, eg. **00/12345**.
10. Select the required **Qualified Teacher Status** from the drop-down list.
11. In the **Employment Dates** panel, click **New** and enter the **Employment Start** date. If the information is available, enter the **Continuous Service Start Date**, **Local Authority Start Date**, and name of the **Previous Employer**, but this could be entered at a later date. **NOTES** can also be entered. Click **OK**.
12. Click **Save** to add the member of staff. Repeat for any other members of staff joining the school.

Adding Leaving Dates for Existing Staff

Enter leaving dates for any teachers as soon as they have left your school.

1. Select **Focus | Person | Staff** to display the **Find Staff** browser.
2. Search for and then double-click the required member of staff to display the **Employee Details** page.
3. Click the **Employment Details** hyperlink to display the **Employment Details** panel. Close any existing contracts by clicking **Open** and entering the **Contract End Date** and **Destination**, reason for leaving – this information is vital for the School Workforce Census. **Save** these changes.

A message will be displayed stating
“Terminating this contract will close all contracts for this person. Do you wish to use this date as the Date of Leaving?”

4. Select **Yes**.
5. The **Pay Scale End Date**, **Role End Date** and **Employment End Date** will also be populated.
6. **Save** the staff record.

Appendix B Dates of Birth/Year Groups for Pupils in Academic Year 2025-2026

Year Group	Date of Birth Range for 2025-26 Academic Year	Age Range
E1	01/09/2024 to 31/08/2025	0 – 1
E2	01/09/2023 to 31/08/2024	1 – 2
N1	01/09/2022 to 31/08/2023	2 – 3
N2	01/09/2021 to 31/08/2022	3 – 4
R	01/09/2020 to 31/08/2021	4 – 5
1	01/09/2019 to 31/08/2020	5 – 6
2	01/09/2018 to 31/08/2019	6 – 7
3	01/09/2017 to 31/08/2018	7 – 8
4	01/09/2016 to 31/08/2017	8 – 9
5	01/09/2015 to 31/08/2016	9 – 10
6	01/09/2014 to 31/08/2015	10 – 11
7	01/09/2013 to 31/08/2014	11 – 12
8	01/09/2012 to 31/08/2013	12 – 13
9	01/09/2011 to 31/08/2012	13 – 14
10	01/09/2010 to 31/08/2011	14 – 15
11	01/09/2009 to 31/08/2010	15 – 16
12	01/09/2008 to 31/08/2009	16 – 17
13	01/09/2007 to 31/08/2008	17 – 18
14	01/09/2006 to 31/08/2007	18 – 19
	after 01/09/2007	19+

Appendix C Admissions Module Set Up

Setup Multiple Admission Groups

1. Select **Tools | Admission | Defaults**.
2. Tick **Multiple Admission Group** and **Save** settings.

The screenshot shows the 'Setup Details' window with the following fields and values:

1 Setup Details	
Admission No. Prefix	0
Admission No. Suffix	06124
Multiple Admission Group	☒
Next Enquiry Reference	1

3. Close SIMS and log in to activate Multiple Admission Groups

Once Applicants have been admitted on roll from admission the Admission records, and Admission groups can be tidied.

- Admission records for applicants not admitted on roll, and who the school have no need to keep the data for, can be deleted.
- Historical Admission Groups can also be deleted.

Adding Multiple Admission Groups.

Routines | Admissions | Admissions Group | Set Up

1. **Search** for the **Intake Group** to add another admission group to and **Open** the Intake Group.
2. From **Panel 2: Admission Groups**, click **New** to display the **Add Admission Group** dialog.
3. Enter a **Name** (This must be different to the Intake).
4. Group name, even if just by character spacing) for the admission group, together with the **Date of Admission**. Alternatively, click the **Calendar** and select the required date.
5. Click **OK** to add the admission group and return to the **Intake Group Details** page.
6. If any further admission groups are required, click **New** and repeat steps 1 and 2.

NOTE: Even if you are set up to allow multiple admission groups you may find it easier just to assign one admission group to each intake group.

7. **Save** to create the intake and admission groups.
8. Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

The screenshot shows the 'Intake Group Details' window with the following data:

1 Intake Group	
Admission Year	2022/2023
Admission Season	Autumn
Year Group	Year R
Planned Admission	30
Name	2022/2023 - Autumn Year R
Active	☒

2 Admission Groups	
Name	Date Of Admission
2022/2023 - Autumn YrR - Group 1	05/09/2022
2022/2023 - Autumn YrR - Group 2	12/09/2022

Tidying Admission Records

1. **Focus | Admission | Application**
2. Click the **Application Status** dropdown, scroll right to the top and select **<Any>**.
3. Click **Search**, to populate the window with all existing pre-admission records.
4. The records appear in alphabetical order, click the heading **Application Status** to sort them by this column.

Name	Date Of Birth	Gender	Application Status	Intake	Admission Group	House
Aaron, Chris	01/09/2005	Male	Admitted	2009/2010 - Autumn Year N2	2009/2010 - Autumn Year N2 (A)	
Aaron, Liz	01/09/2005	Female	Admitted	2009/2010 - Autumn Year N2	2009/2010 - Autumn Year N2 (A)	
Aaron, Sophie	01/09/2005	Female	Admitted	2009/2010 - Autumn Year N2	2009/2010 - Autumn Year N2 (A)	
Abdullah, Tamwar	12/01/2008	Male	Admitted	2012/2013 - Autumn Year N2	Nursery Autumn 2011 [1]	
Abhra, Abjt	20/11/2009	Male	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Abhra, Alsha	20/11/2009	Female	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Abhra, Neel	20/11/2009	Male	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Ackton, Stan	22/03/2010	Male	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Ackton, Stephen	12/03/2006	Male	Admitted	2010/2011 - Autumn Year R	2010/2011 - Autumn Year R (A)	
Acton, Jordan	11/02/2004	Male	Admitted	2007/2008 - Autumn Year N2	CES New Intake 2007 Nursery	
Acton, Sam	25/03/2003	Female	Admitted	2007/2008 - Integrated Year R	CES New Intake 2007	
Adams, Adam	31/08/2005	Male	Admitted	2009/2010 - Autumn Year R	2009/2010 - Autumn Year R (A)	

- Records with a status of **Admitted** must be retained.
- **Applicant Records** with **future admission dates** with a status of **Applied, Offered or Accepted** must also be retained.
- All other records can be deleted.

5. Highlight the record to delete.
6. Click **Delete** at the top of the screen.
7. Click **Yes** in the pop-up window.
8. Repeat this process until all unwanted records are removed from your system.

Name	Date Of Birth	Gender	Application Status	Intake	Admission Group	House
Abdullah, Tamwar	12/01/2008	Male	Admitted	2012/2013 - Autumn Year N2	Nursery Autumn 2011 [1]	
Abhra, Abjt	20/11/2009	Male	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Abhra, Alsha	20/11/2009	Female	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Abhra, Neel	20/11/2009	Male	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Acton, Stan	22/03/2010	Male	Admitted	2013/2014 - Autumn Year N2	Nursery Admissions 2013	
Acton, Stephen	12/03/2006	Male	Admitted	2010/2011 - Autumn Year R	2010/2011 - Autumn Year R (A)	
Acton, Jordan	11/02/2004	Male	Admitted	2007/2008 - Autumn Year N2	CES New Intake 2007 Nursery	
Acton, Sam	25/03/2003	Female	Admitted	2007/2008 - Integrated Year R	CES New Intake 2007	
Adams, Adam	31/08/2005	Male	Admitted	2009/2010 - Autumn Year R	2009/2010 - Autumn Year R (A)	
Adams, Laura	03/03/2007	Female	Admitted	2011/2012 - Autumn Year R	Reception Autumn 2011	
Adams, Nancy	18/12/2011	Female	Admitted	2015/2016 - Autumn Year N2	Nursery Admissions 2015	
Adams, Sadie	20/03/2013	Female	Applied	2016/2017 - Autumn Year N2	2016/2017 - Autumn Year N2 (A)	
Adashaj, Mohammed	02/02/2006	Male	Admitted	2010/2011 - Autumn Year R	2010/2011 - Autumn Year R (A)	
Akeman, Rebecca	18/09/2007	Female	Admitted	2012/2013 - Autumn Year R	Reception Autumn 2012	

Deleting Applications will affect your annual statistics and is irreversible.

Are you sure you wish to continue?

Yes No

Tidying Admission Groups

1. Once you have tidied the Admission Records, then tidy up your Admission Groups.
2. **Routines | Admission | Admission Groups | Setup**
3. Click the **Status** dropdown and select **<Any>**.

Find Intake Group

New Search Open Delete Print Browse Next Previous

Name: Admission Season: <Any> Status: Active

Admission Year: <Any> Year Group: <Any> ...

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2006 - Autumn - R	2006/2007	Autumn	Year R	33	Inactive
2006 - Autumn - N	2006/2007	Autumn	Year N2	33	Inactive
2007/2008 - Autumn Year N2	2007/2008	Autumn	Year N2	40	Inactive
2007/2008 - Integrated Year R	2007/2008	Autumn	Year R	40	Inactive
2009/2010 - Atmn Yr N CES	2009/2010	Autumn	Year N2	30	Inactive

4. Click **Search** to populate the window with all existing Admission groups.
5. Historic Admission groups can be deleted.
6. **Highlight** the Group to delete.
7. Click **Delete** at the top of the screen.

Find Intake Group

New Search Open Delete Print Browse Next Previous

Name: Admission Season: <Any> Status: <Any>

Admission Year: <Any> Year Group: <Any> ...

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2006 - Autumn - R	2006/2007	Autumn	Year R	33	Inactive
2006 - Autumn - N	2006/2007	Autumn	Year N2	33	Inactive
2007/2008 - Autumn Year N2	2007/2008	Autumn	Year N2	40	Inactive
2007/2008 - Integrated Year R	2007/2008	Autumn	Year R	40	Inactive
2009/2010 - Atmn Yr N CES	2009/2010	Autumn	Year N2	30	Inactive

8. Click **OK** in the pop-up window.

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Deleting an intake group will delete all applications for this intake. If you wish to maintain a history of applications that have been admitted, withdrawn or rejected then the group should be made inactive rather than deleted.

OK Cancel

NOTE: Admission Groups cannot be deleted if there are current applications associated with it. This should be resolved by tidying Admission records. However, if you are still unable to delete an historic Admission Group you will need to make it inactive.

Making Admission Groups Inactive

1. Double click the Admission Group to open the record.
2. Remove the **Active** tick
3. **Save** the record.

Intake Group Details: 2016/2017 - Autumn Year N1

Save Undo Print

1 Intake Group 2 Admission Groups

1 Intake Group

Admission Year: 2016/2017 Name: 2016/2017 - Autumn Year N1

Admission Season: Autumn **Active** ☐

Year Group: Year N1

Planned Admission: 8

Transferring New Intake Students Between Intake Groups

It is possible to move pupils 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.

4. 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.

Appendix D Setting Up and Defining Early Years Provisions

Introduction

Schools with a dedicated nursery unit, that offer early years care, must present parents of three to four year olds with the choice of varying nursery hours on any day of the week. Parents are now entitled to receive 15 hours of free nursery provision per week, which can be taken over a minimum of three days. They can choose to take as much or as little of the 15 hours and use their entitlement at more than one nursery provider, if they wish.

Attendance Setup includes the facility to define Early Years Provisions, from which Early Years Attendance patterns can be created for applicable applicants and pupils, in order to calculate Hours at Setting for nursery age pupils, for School Census purposes

Defining a New Early Years Provision

A pupil can only have one provision type per day; therefore the provision types must be defined accordingly. If provision times overlap sessions, a decision as to which session to map to must be made, eg. should a 9.00am to 2.00pm provision be mapped to an **AM** or an **All-Day** category.

Four predefined Nursery Care Provision Type lookups are available for selection when defining or editing an early year’s provision:

- **Provision 1**
- **Provision 2**
- **Provision 3**
- **No Provision.**

These Provision Type lookups can be edited or deleted.

1. **Tools | Setups | Attendance Setup | Early Years Provisions Setup** to display **Find Early Years Provisions** browser.

Description	Provision Type	Start Date	End Date	Start Time	End Time
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2. Click **New** to display the **Early Years Provision Details** page

Early Years Provision Details : Morning attendance only

Save Undo Print

1 Provision Details

1 Provision Details

Provision Type: Provision 1

Description: Morning attendance only

Start Date: 01/09/2022

End Date: 24/10/2022

Start Time: 09:00 hh:mm (24 hrs)

End Time: 12:00 hh:mm (24 hrs)

3. Select the required **Provision Type** from the drop-down list, eg. Provision 1.
4. By default, the selected **Provision Type** is displayed in the **Description** field. This description can be edited to describe the nursery care provision more clearly, eg. Morning Nursery Care, if required.
5. By default, the **Start Date** is displayed as today's date. If necessary, edit the date to indicate when the nursery care provision is to start or click the **Calendar** and select the required date.
6. Optionally, enter an **End Date** for the provision (if known) or click the **Calendar** and select the required date. This date can be entered later.
7. Select a **Start Time** and an **End Time** for the provision from the respective drop-down lists, eg. 09.30 to 12.00. Times are available in increments of 30 minutes
8. Click **Save**.

Editing an Early Years Provision

All aspects of a nursery care provision can be edited regardless of whether it is currently being used or not. Therefore, the provision types, associated start and end dates, and the start and end time can all be amended, if required.

1. Click **Search** to display the **Early Years Provision Details and open to edit**.

Find Early Years Provisions

New Search Open Delete Print Browse Next Previous

Description: Provision Type: <Any>

From Date: To Date:

Description	Provision Type	Start Date	End Date	Start Time	End Time
Afternoon attendance only	Provision 2	05/09/2022	21/10/2022	12:30	15:30
All day attendance	Provision 3	01/09/2022	24/10/2022	09:00	15:30
Morning attendance only	Provision 1	01/09/2022	24/10/2022	09:00	12:00
No attendance	No Provision	01/09/2022		00:00	00:00

Early Years Provision Details : Morning attendance only

Save Undo Print

1 Provision Details

1 Provision Details

Provision Type: Provision 1

Description: Morning attendance only

Start Date: 01/09/2022

End Date: 24/10/2022

Start Time: 09:00 hh:mm (24 hrs)

End Time: 12:00 hh:mm (24 hrs)

2. Select a different Provision Type from the drop-down list, if required.
3. Make the changes
4. Click **Save** to retain your changes.

Setting up Early Years Provision on an Applicant or Pupil record

1. Locate the relevant pupil(s) via Focus / Pupil Details or Focus / Admission / Applicant
2. Open the applicant or pupil record and move to the Registration panel (panel 2).

Applicant Record example

This screenshot shows the 'Early Years Attendance Patterns' section for an applicant record. It includes a 'Part-Time' checkbox, 'Start Date' and 'End Date' fields with calendar icons, and a table of weekly provision types. The table has five rows for Monday through Friday, each with a dropdown menu. The Friday dropdown is currently set to 'No Provision'.

Early Years Attendance Patterns	
Monday Provision Type	Provision 1
Tuesday Provision Type	Provision 2
Wednesday Provision Type	Provision 2
Thursday Provision Type	Provision 1
Friday Provision Type	No Provision

This screenshot shows the 'Add/Edit Early Years Attendance Patterns' dialog box for a pupil record. The dialog box is open over the main record page, which shows 'Part Time Details', 'School Arranged Alternative Provision Placements', and 'Early Years Attendance Patterns'. The dialog box contains 'Start Date' (05/09/2022) and 'End Date' fields, a 'Refresh Week' button, and five dropdown menus for Monday through Friday Provision Types, all of which are currently redacted with red bars. 'OK' and 'Cancel' buttons are at the bottom.

Pupil record example

