



Secondary & All Through 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 students 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

Secondary & All Through 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 students 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.

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End of Year Procedure Check List

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

Complete	Description/Task
☐	Changes to teaching staff have been recorded in Personnel.
☐	Create the new academic year.
☐	Set up the pastoral structure for the new academic year.
☐	Add intake and admission groups.
☐	Import Admissions and Transfer Files (ATF).
☐	Change the status of applications.
☐	Import Common Transfer Files (CTF). <i>(At a point relevant to your school.)</i>
☐	Record leavers and update course memberships.
☐	Export Common Transfer Files.
☐	Set up the promotion mapping for the Pastoral structure.
☐	Transfer the curriculum and timetable to SQL.
☐	Apply the timetable to the new academic year.
☐	Perform academic promotion.
☐	Export and import student group memberships (if required).
☐	Allocate applicants to registration groups/academic classes
☐	Print Registration Group and class lists for the new academic year.
☐	Enter reasons for absence last year.
☐	Carry out Validate memberships after the Academic Year has started.

Part One – Pastoral

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.

If SIMS Attendance is in use, the appropriate attendance records are created for each pupil on the dates entered.

2025/26 Term Dates

Replace the sample term dates in this handbook with the dates applicable for your school in the forthcoming academic year.

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

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).

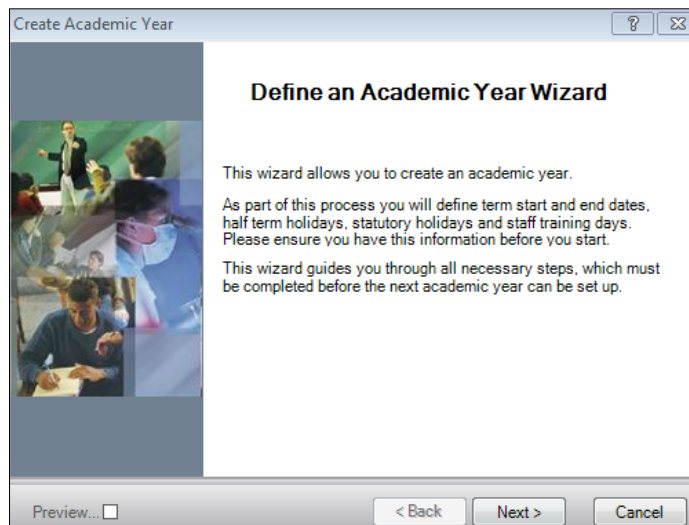
Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing the promotion process has been carried out).

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.



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.

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.

Day of the week	AM Session	PM Session
Monday	☒	☒
Tuesday	☒	☒
Wednesday	☒	☒
Thursday	☒	☒
Friday	☒	☒
Saturday	☐	☐
Sunday	☐	☐

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.

Non-Buckinghamshire Council Schools & Academies, check with your Local Authority for the relevant dates.

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

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	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

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

Add Term... Remove

Preview... ☐

Today Clear Cancel

1. Enter 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 overwrite 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

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

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.

Creating the New 2025-26 Academic Year

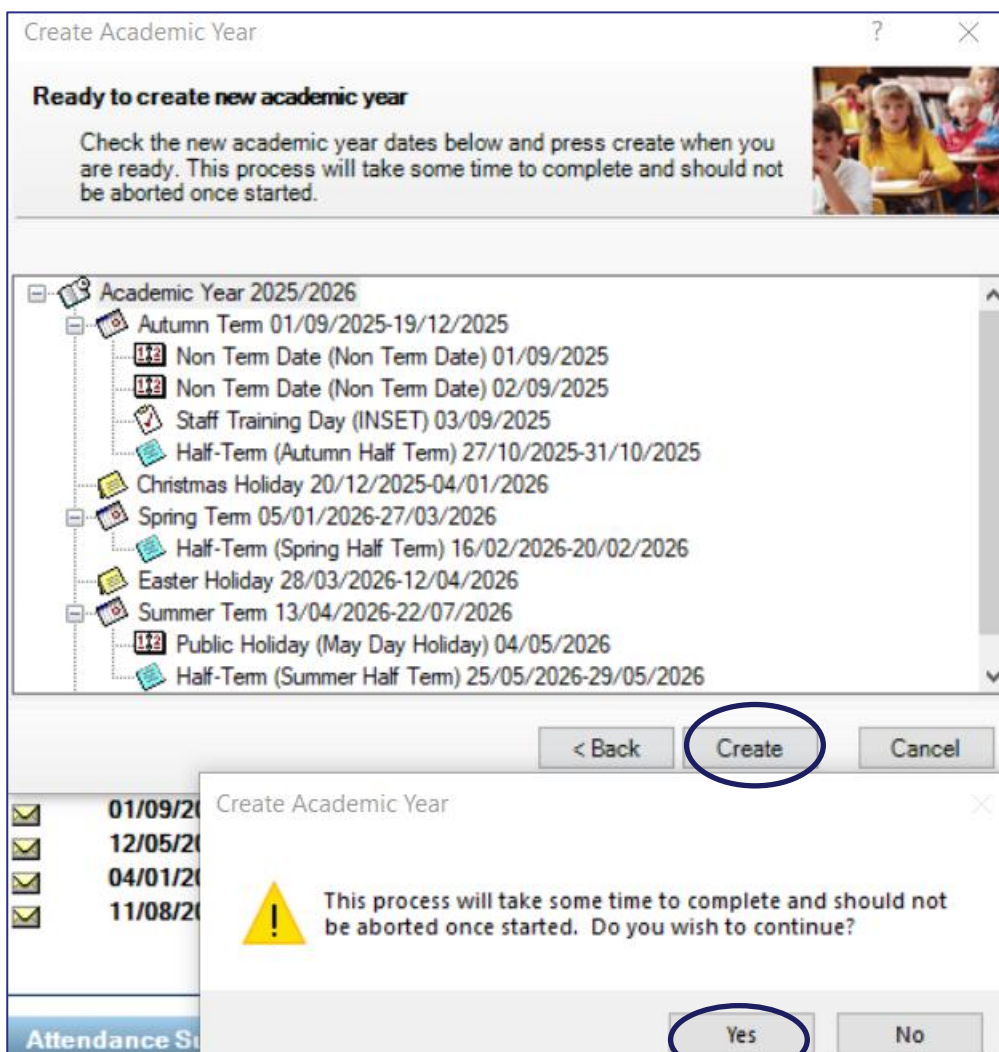
Note: this process may take some time to complete because the system creates attendance records for the new academic year. Do not abort the process once started.

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.

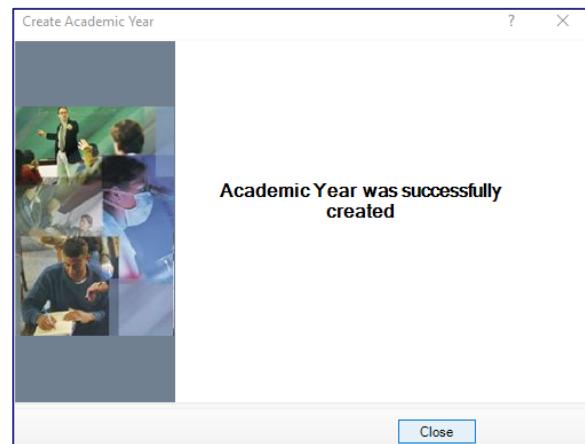
You are advised to check this information carefully for any errors or inaccuracies.

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.

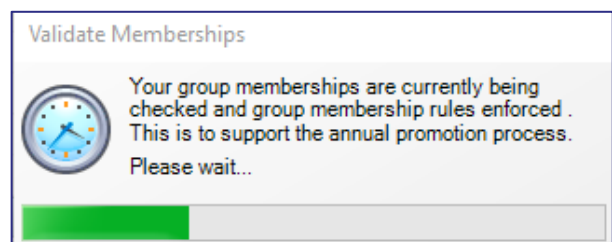
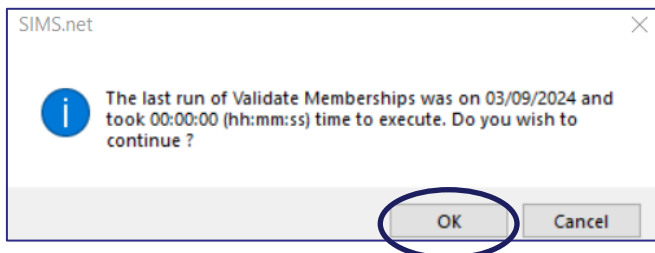
5. Once complete, the final page of the wizard is displayed confirming the **Academic Year was successfully created**.
6. Click **Close** to close the wizard and complete the process.



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

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.

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
2025/2026 - Autumn Year 10	2025/2026	Autumn	Year 10	5	Active

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

- Admission Year** select academic year to which the intake group relates (eg. 2025/2026). This defaults to the new academic year
- Admission Season** select **Autumn**, **Spring** or **Summer**.
If the intake group does not apply to a specific season, select **Integrated** from the drop-down list.
- Year Group** select from the drop-down list.
- Planned Admission** enter the number of applicants expected to be admitted to this intake group.
- If you press the **Tab** key, it moves to the **Name** field or click in this field, a **default name** is supplied for the intake group, based on the **Admission Year**, **Admission Season** and **Year Group**,
eg. **2025/2026 – Autumn Year 7** (The default name can be amended, if required).

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

- The **Active** check box is selected by default and indicates that 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.

2 Admission Group

Name

Date Of Admission 

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

2 Admission Groups

Name	Date Of Admission	
		 New  Open  Delete

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

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

2 Admission Group

Name

Date Of Admission 

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

Multiple Admission Group Set Up

- Follow steps **1** to **4** above to add one admission group.
- If any further admission groups are required, click **New** to add multiple Admission Groups.
Note: names must be unique.

2 Admission Groups

Name	Date Of Admission	
2025/2026 - Autumn Year 7 (A)	04/09/2025	 New  Open

Admission Group

Name

Date Of Admission 

- 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.

Import ATF File Wizard

Please select an ATF file and click next.

C:\Users\manager\Downloads\853LLLL_ATF_8254321_002.xml

Browse

< Back Next > Cancel

Import ATF File Wizard

Pick the intake and admission group you wish to import the applicants into and click next to perform the import.

Intake Group

2025/2026 - Autumn Year 7

☒ Import Contacts

Admission Group

Admission Group	Admit On	Year Group
2025/2026 - Autumn Year 7 (A)	04/09/2025	Year 7

< Back Next > Cancel

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

Matching Applicants

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

Note: Schools with On-Site Nurseries:

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

Pupils contained within the 2025/26 ATF, should not match with an existing 2024/25 applicant record and a duplicate pupil applicant record in 2025/26 will be created. This enables attendance to continue to be taken until the end of the 2024/25 Academic Year. **DO NOT** change their Admission Group to prevent loss of attendance data before the end of term.

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

If these pupils show in the matched screen, ensure **both ticks are removed** and then manually remove these pupils from the 2025/26 admission group to remove duplicates. These pupils will be promoted from N2 to Year R (refer to Chapter 5).

Import ATF File Wizard

The following applicants within the ATF file have been matched with existing people. If you believe that the system has matched a person correctly, please indicate that a new application should be created for that person. If the person already has an application you may choose to update the existing application rather than creating 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				
				☒	New Application	Amy Davis	29/03/2018	Female	Student, Appl
Dobir Achmed	823-2023-10-K-000041	12/11/2019	Male	☐	New person				
				☒	New Application	Dobir Achmed	12/11/2018	Male	Student, Appl
George Honeyw	823-2023-10-K-000062	04/06/2019	Male	☐	New person				
				☒	New Application	George Honeyw	04/06/2018	Male	Student, Appl
James Tang	823-2023-10-K-000063	23/06/2019	Male	☐	New person				
				☒	New Application	James Tang	23/06/2018	Male	Student, Appl

Print < Back Next > Cancel

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

Import Contacts

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

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

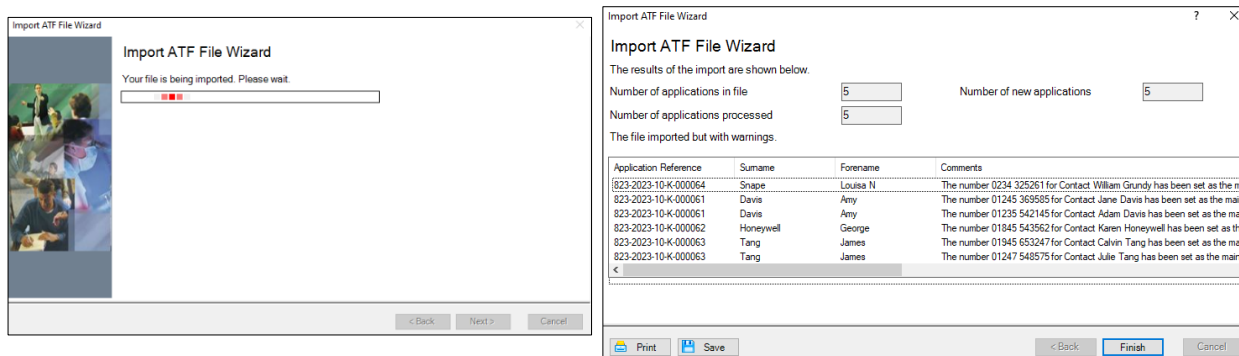
The Admissions Transfer File will contain only one contact per applicant as it is generated directly from the admissions module off the ONE system which can only be completed by one person.

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

Family Links will have to be made manually in SIMS.

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 Honeywel	74 Goosemere, Milton Keynes	☒	Ms	KAREN Honeyw	1 Goosemere, Milton Keynes, MK	Contact
			☐		New person		

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



3. Click **Finish** to complete the process.
4. Click **Yes** to confirm the closure of the wizard.

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

Importing Common Transfer Files (CTFs)

If you do not have any CTF's to import, proceed to **Adding an Applicant to Admissions Manually**.

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.

- This section provides a summary of the steps required to import a CTF.
- Pupils with CTFs can be imported into a **pre-admission group** or **directly on-roll**.

Appropriate intake/admission groups must be created before you can import CTF files (refer to **Adding Intake/Admission Groups**).

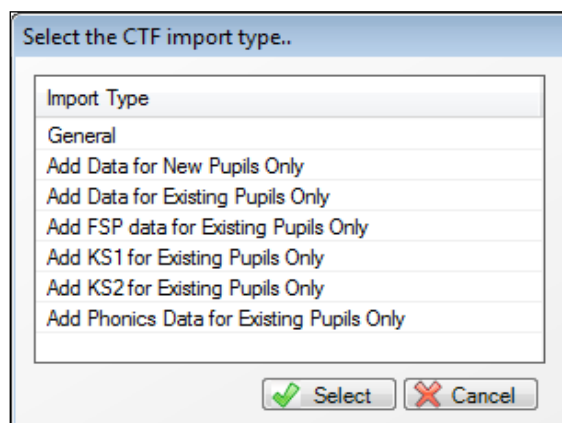
1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog.
2. Choose one of the following:

Add Data for New Pupils Only – for pupils who do not already exist in SIMS

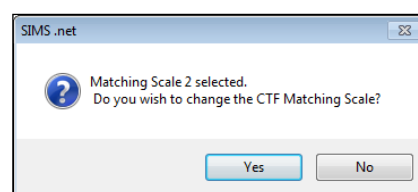
or

Add Data for Existing Pupils Only – for pupils who already exist in SIMS (including in a **Pre-Admission Group**)

Highlight the required CTF import type, then click **Select** display a message asking you to confirm whether you want to change the matching scale.



For detailed instruction on importing a CTF file and using the CTF Matching utility, refer to the *Using the CTF Matching Screen* mini guide or to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook available from the SIMS Documentation Centre.



Import CTF (Add Data for New Pupils Only)

1 Data to be Imported 2 Import Selection 3 Exception Log

1 Data to be Imported

Student Basic Details	☒	Student Address	☐	Student Contacts	☐	Looked After	☒
SEN Information	☒	Assessment Data	☒	School History	☒		
Attendance Summary	☒	Programme of Study(PoS) Assessments	☒	FSM History	☒		

2 Import Selection

CTF File: S:\SIMS\Star\CTFIN\8252999_CTF_8252999_003.xml

Place new pupils in: Pre-Admission

* New pupils and their data will be added.
 * Data for existing pupils will be ignored
 * Pupil matching is needed to determine which pupils are new

Pre-Admission Group	Admit On	Year Group
2024/2025 - Summer Year 3 (A)	22/04/2025	Year 3
2025/2026 - Autumn Year R (A)	04/09/2025	Year R
2025/2026 - Autumn Year R (B)	05/09/2025	Year R

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, browse to the location of the CTF by clicking **Open** adjacent to the **CTF File** field to display the **Select Import File** dialog.

1. Navigate to the required location, highlight the CTF.
2. Click **Open** to return to the **Import CTF** page.
3. From **Place new pupils in**, select the admission group from the drop-down list (ie. **Pre-Admission**).

Note: Although “Place New Pupils in” checkbox has an **On-roll** option available, it is unlikely September 2025 admissions would be imported directly on-roll.

4. Click **Import CTF** to start the import.
5. Details of any errors are displayed in the **Exception Log** at the bottom of the **Import CTF** page.
6. Once you have finished importing the CTF, edit the details of the imported pupils as required.

Applicant Records

Once you have imported the ATF and/or CTFs, 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 – Student Previously On Roll

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

1. Select **Focus | Admission | Application** to display the **Find Application** screen.
2. Click **New** 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' window. The 'Basic Details' section has fields for Surname (filled with 'kaur'), Forename, Gender (dropdown), and Date of Birth. A 'Continue' button with a green arrow is at the bottom right. Below this is the 'Matched People' section, which contains a table of results and two buttons: 'New' and 'Open'.

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

4. The applicant record will open on screen.
5. Select the required **Intake Group** and **Admission Group**.
The Year Group, Year Taught-In and Date of Admission will complete automatically.
6. **Save** the record.
7. 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.

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

The screenshot shows the 'Add Applicant' window with the 'Basic Details' section. It includes fields for Surname, Forename, Gender (dropdown), and Date of Birth. A 'Continue' button with a green arrow is at the bottom right.

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

NOTE: The system will search for any matched records.

If any matching records 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**.

If **no records match**, click **New** (to the right).

4. The applicant record will open on screen.
5. Select the required **Intake Group** and **Admission Group**, the Year Group, Year Taught In and Date of Admission will complete automatically.
6. **Save** the record.
7. 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 that 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 7**, 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
2025/2026 - Autumn Year 7	2025/2026	Autumn	Year 7	180	Active
2025/2026 - Autumn Year 10	2025/2026	Autumn	Year 10	5	Active

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		☒	
☒	Snape, 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 the 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	Applied	☒	☒	
☒	Davis, Amy	Female	29/03/2011	Applied	☒		
☒	Honeywell, George	Male	04/06/2011	Applied	☒		
☒	Snape, 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 students in an **Intake group**.

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

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

This means students can be admitted at any time on the date agreed and takes pressure of the busy office.

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/Decline 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.

1 Summary

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

The **Applications** panel displays by default, all applicants with an application status of **Offered**.

The display includes the **Name**, **Sex**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

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

To withdraw, click the **Withdraw** column.

2 Applications

Current Application Status

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Achmed, Dobir	Male	12/11/2012	Offered	☒	☐	☐
Davis, Amy	Female	29/03/2013	Offered	☒	☐	☐
Honeywell, George	Male	04/06/2013	Offered	☒	☐	☐
Snape, Louisa N	Female	12/11/2012	Offered	☒	☐	☐
Tang, James	Male	23/06/2013	Offered	☒	☐	☐

2 Applications

Current Application Status

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Achmed, Dobir	Male	12/11/2012	Accepted	☐	☒	☐
Davis, Amy	Female	29/03/2013	Accepted	☐	☒	☐
Honeywell, George	Male	04/06/2013	Accepted	☐	☒	☐
Snape, Louisa N	Female	12/11/2012	Withdrawal	☐	☐	☒
Tang, James	Male	23/06/2013	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.**
2. **Search** for Applicant record and select **Open**.
3. **Panel 2: Registration Details.**
4. 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.

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		

5. **Save** the record.
6. **Continue from Step 2** for all relevant Admission records.

Bulk Update Applicant's Details

A new Functionality to Bulk Update Applicants details.

1. Select **Routines | Admissions | Bulk Update Applications**
2. Select the **Group** you wish to update.
3. Select the **data item** you wish to update.
4. Click **Search** to see Applicants to update records.

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

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							

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

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. Refer to **Chapter 5: Setting up the Promotion Mapping for the New Academic Year**.

If an additional year group is required, this should be added before admission groups are created to ensure the new year group is available for selection. Refer to **Adding Intake/Admission Groups**.

It is essential the short name of each year group matches exactly the name of the corresponding description.

New Teaching Staff for 2025/2026

Details of new teachers joining the school should be recorded as soon as the information is available. 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 'Employee Details' form for Robert Jones. The 'Employment Details' tab is active. The 'Teaching Staff' checkbox is checked. The 'Teacher Number' is 03/82695, 'Teacher Category' is 'Qualified Teacher', 'Qualified Teacher Status' is 'Qualified', and 'Staff Code' is 'RJ'. The 'Employment Dates' section shows 'Employment Start' as 01/09/2025. There are buttons for 'Save', 'Undo', 'Print', and 'Suspense' at the top. At the bottom right, there are buttons for 'New', 'Open', and 'Delete'.

Any existing teachers who are leaving the school should be allocated leaving dates.

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

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

- 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.

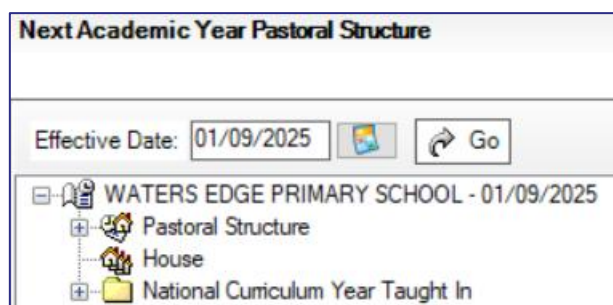
NOTE: If an additional year group is required, eg. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure the new year group is available for selection.

For more information, refer to **Adding Intake/Admission Groups**.

Opening the Pastoral Structure of the New Academic Year

Secondary Schools who have timetables work with two Academic Years:

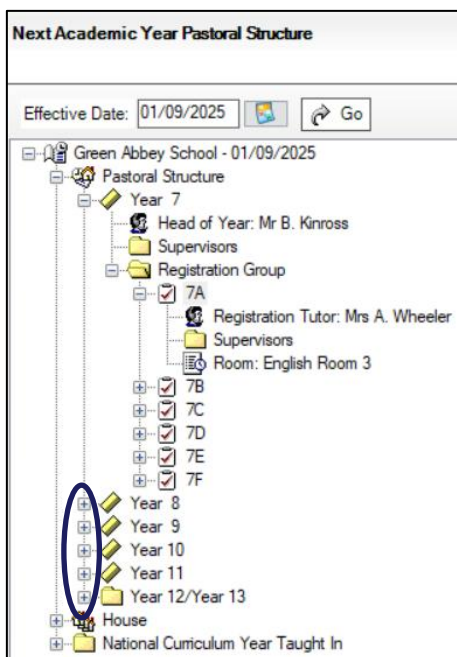
- **(Pastoral) Academic Year** which runs from 1st September to 31st August and relates to the age demographic of students.
 - **(Working) Academic Year** which runs from the first date that school opens to students in September through to the last date of the following Summer Term (when school closes to students) and is created upon sending over the timetable.
1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.
 2. Click **Go**.



NOTE: 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

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

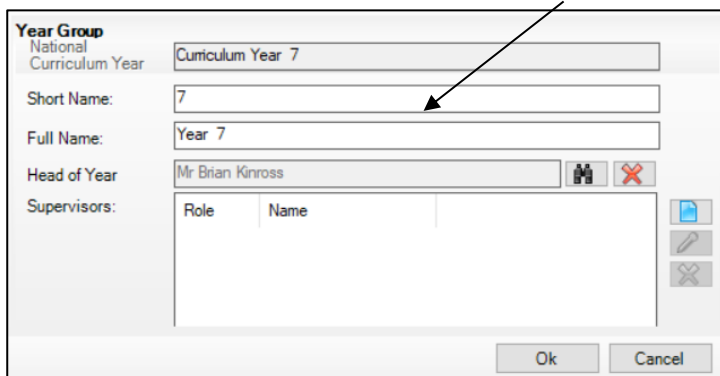


Checking National Curriculum Years

Ensure the **National Curriculum Year** associated with each year group is correct.

This can be achieved by right clicking each year group and selecting **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

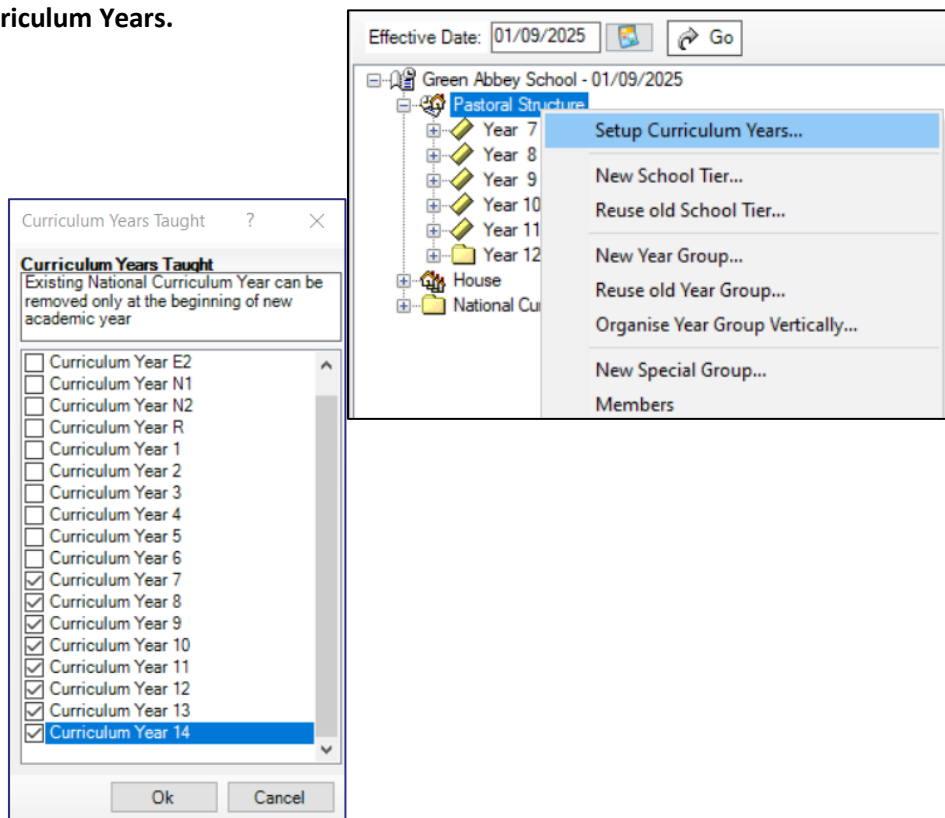
If an additional year group is required, eg. Year 14 or Nursery classes (N1, E2 or E1); this should be added before admission groups are created to ensure the new year group is available for selection.

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**.

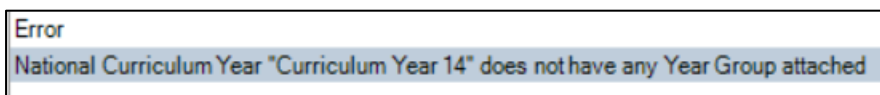
3. Select the required **Curriculum Years Taught** check box(es).



NOTE: Once a National Curriculum year has been created, it cannot be deleted.

Ensure the correct NC year is added.

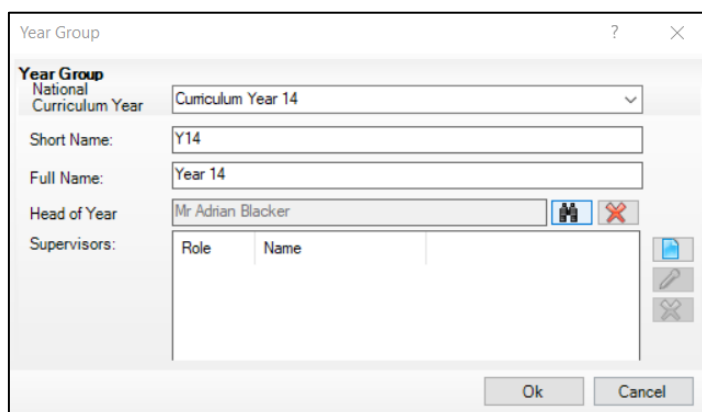
Errors are displayed at the bottom left of the screen until years and classes have been added (example as shown in the following graphic).



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

- **New Year Group** for Year Groups never used in the Pastoral Structure previously
- **Re-use Old Year Group** – for year groups previously used in the Pastoral Structure

5. Select the **National Curriculum Year** which the year group will be associated, from the drop-down list.



6. Enter a **Short Name**** (max. 10 characters) and **Full Name** (max. 32 characters) for the **Year Group**.

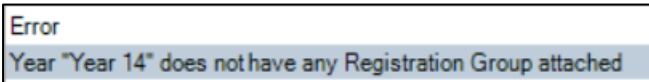
The **Full Name** is used in SIMS to identify the **Year group** (eg. **Year 14**).

The **Short Name** is used for **Column Headings** in reports (eg. **Y14**).

**** To ensure column headings fit comfortably on the report page, it is recommended **short names** should be a **maximum of six characters**. Both names must be unique within the school.**

7. Select the **Head of Year** if required, by clicking **Browser** to display the **Select person** dialog. This is optional.
8. 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.



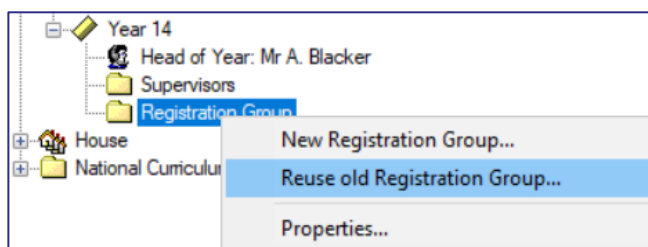
Once added the  Up  Down button can be used to place the year groups back into the correct order.

Add a Registration Group to a New Year Group

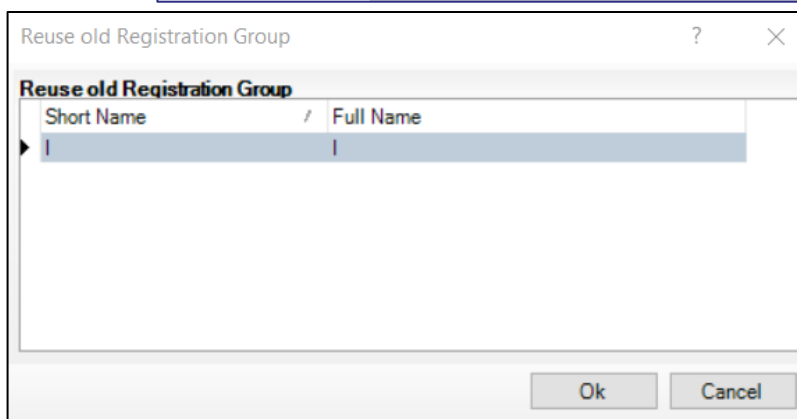
It is advised to check whether the name you intend to use for a new class has not previously been used. Expand the Pastoral Structure and appropriate year group; then right click the Registration Group folder and select **Reuse Old Registration Groups** from the pop-up menu to display the Reuse old Registration Group dialog. This dialog lists any classes that have previously been removed.

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



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



Add a New Registration Group

For Registration Group names not previously used in SIMS.

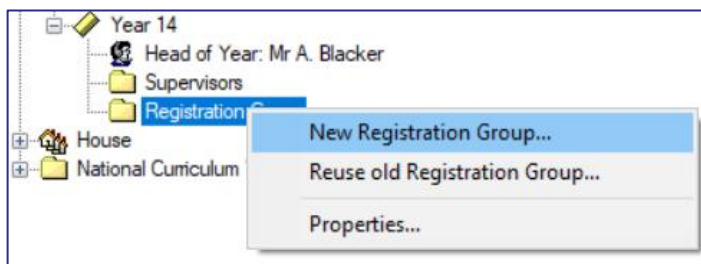
1. Right click on **Registration Group** and select **New Registration Group**.
2. Enter a **Short Name** and a **Full Name** for the new class.

The **Short Name** (max. 10 characters) is used for **Column Headings** in reports (eg. Voc).

The **Full Name** (max. 32 characters) is used in SIMS to identify the **Class** (eg. Vocational).

To ensure column headings fit comfortably on the report page, it is recommended that short names should be a maximum of six characters.

Both names must be unique within the school.



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

Changing Year Group Horizontal/Vertical Structures

If you do not intend to change the pastoral structure, proceed to **Changing a Class Teacher**.

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

- A **horizontal** structure is where students in a Registration Group are all in the same Year Group.
- A **vertical** structure allows a Registration Group to contain students 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 and this may require a change to a combined horizontal and vertical structure.

For example:

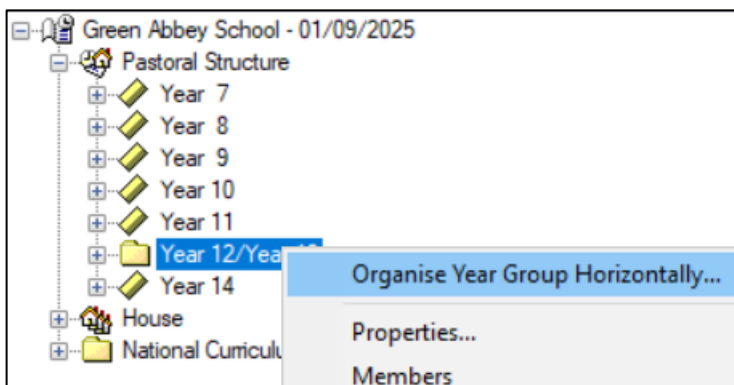
- **Falling student numbers.**
This may require a change from a horizontal to a vertical structure to enable students from mixed year groups to be taught in the same class.
- **Increased student numbers.**
This may require a change from a vertical to a horizontal structure to enable students from the same year to be taught in the same class.
- **A change in student numbers across the years**, eg. a low birth rate one year, then a high birth rate two years later. This may require a change to a combined horizontal and vertical structure.

Changing from a Vertical to a Horizontal Structure

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

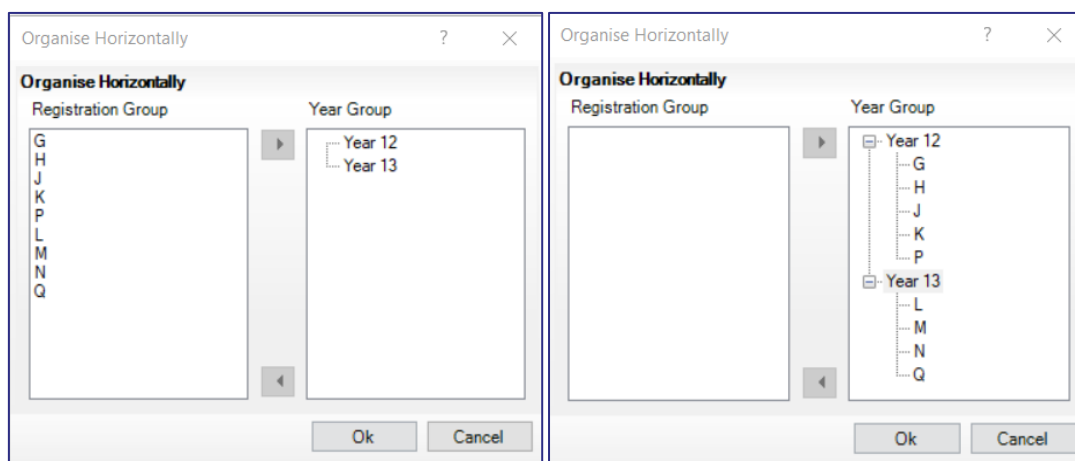
Vertically organised year groups can be identified by their names, separated by a forward slash, eg. Year 12/Year 13.

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.



This next dialog enables you to determine the class(es) that should be attached to each year.

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 a Year Group, as shown in the following example.

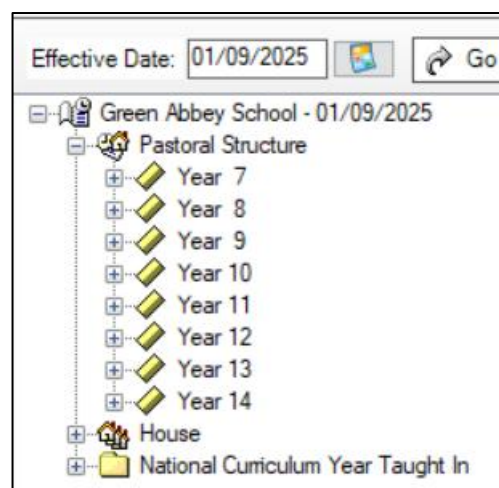


NOTE: Each class must be attached to a single year group and each year group **MUST** have a class, the Class panel must be empty before you can complete the process.

6. 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.

7. Click **Save**.

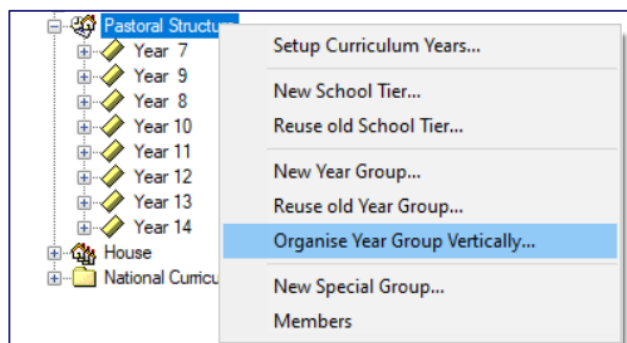


Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, student numbers have decreased. This could allow previously separate years, eg. **Year 12, Year 13 & Year 14** (horizontally structured) to be merged into a single year, vertically structured.

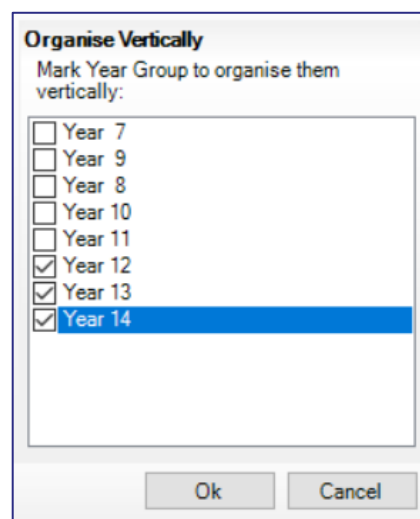
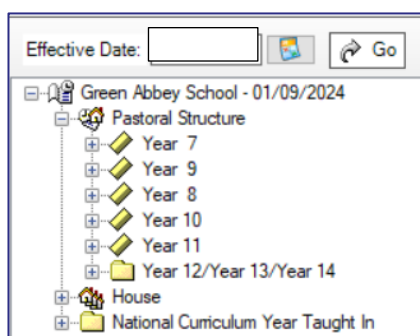
Select **Focus | School | Pastoral Structure | Next Academic Year Structure**

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 12, 13 and 14 (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 Registration Groups (Classes)

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

Class Names – Important Information

- 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

There may be occasions when class names are to be edited. This is sometimes required by schools if class names are based on the teacher's initials. 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 edited you must add the new class name to the pastoral structure, and then remove the unwanted class. (If done midyear this process will allow you to assign students to the new class name)

Class Naming Convention

The responsibility for defining the naming convention of classes lies with the school.

Primary schools may wish to use classes named after trees, colours, animals, etc.

An alternative is to name classes by year and a single initial (not based on a teacher's name) such as 7A, 7B, etc. that remain static year on year.

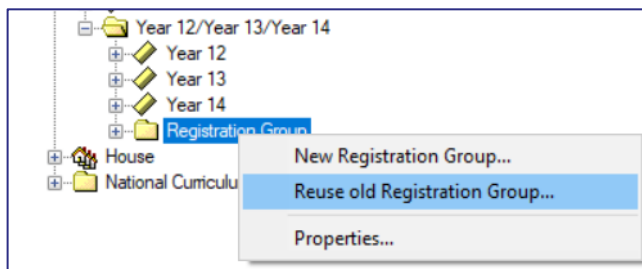
1. Expand the year group to which you wish to add the class by clicking the adjacent + icon.
2. Right-click the **Registration Group** folder
 - If the required name is listed, highlight it, and click **OK** to re-use the class rather than create a new class with the same name.
 - If the required name is not listed, click **Cancel** and create a new class (see below)

Either:

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

or

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



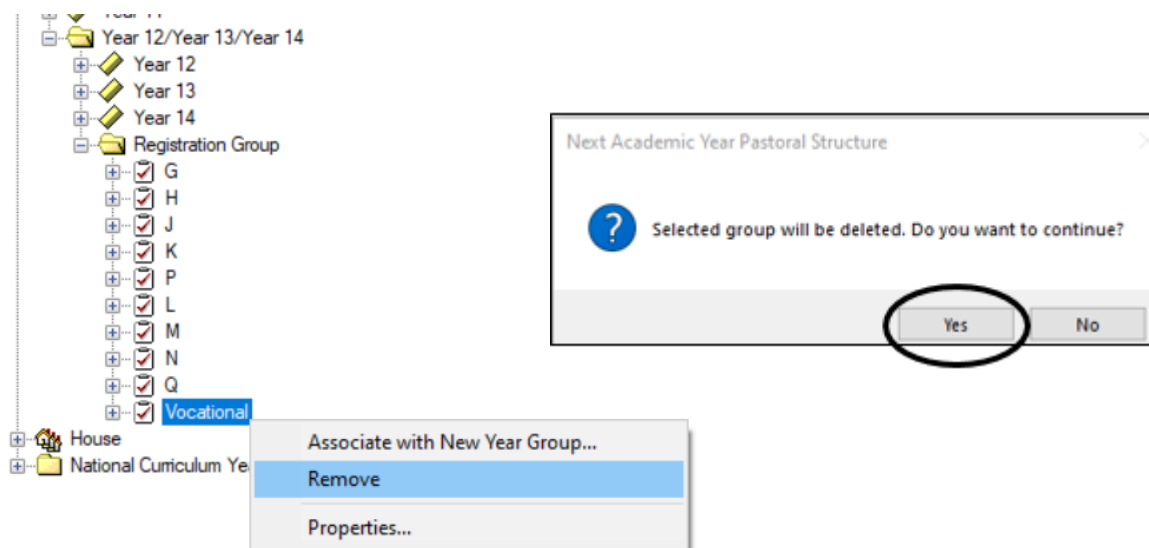
3. Enter a **Short Name** and **Full Name** for the new class.
4. Add the **Registration Tutor** by clicking **Browser** to display the **Select person** dialog.

Refer to **Classes with Two Registration Tutors** if applicable.

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 choose **Remove** from the menu.

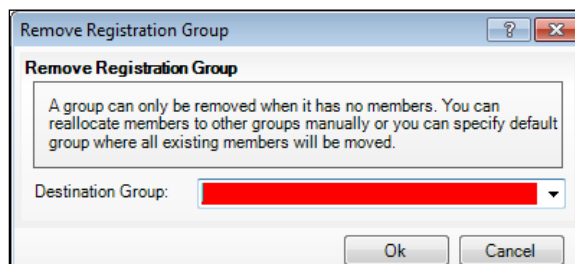


4. Click **Yes** to the warning message.

5. Click **Save**.

If there are previously assigned students in the 2025/26 Academic structure, they must be assigned to the new group.

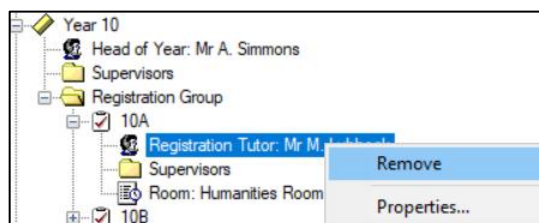
6. Click the **Destination Group** drop-down list, select the Reg group.
7. Click **OK** to delete the registration group and transfer the student membership.
8. Click **Save**.

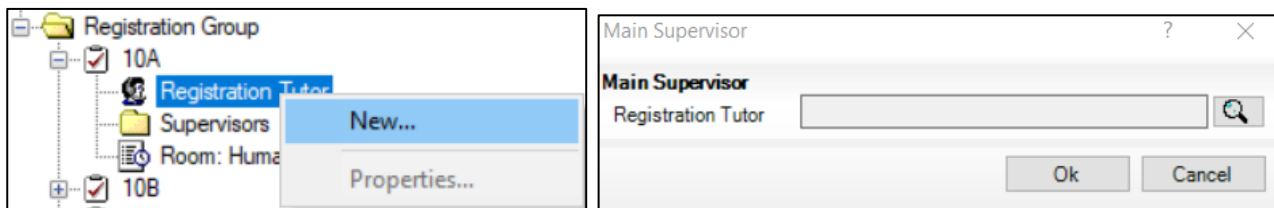


Adding/Removing a Class Teacher on the Pastoral Structure

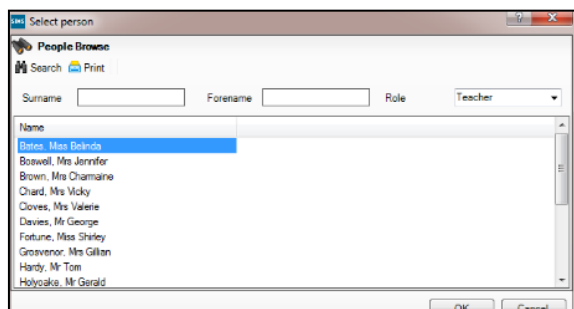
This process can only be carried out where class names are going to remain the same and it is only the associated teacher that is changing. If the class name is going to change, refer to **Important Note on Editing Class Names**.

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
6. **Right click** on **Registration Tutor** and click **New**.
7. Click on 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.

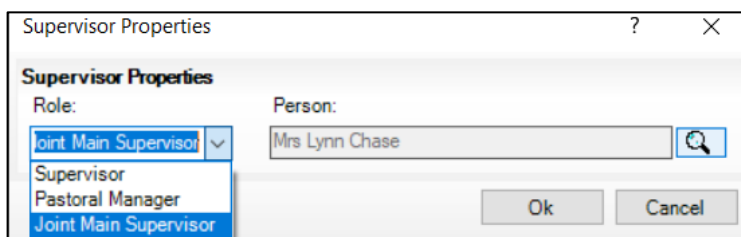
1. Expand the required **Year Group**.
2. Expand the required **Registration Group**.
3. Check the primary **Registration Tutor** has been assigned as outlined earlier.



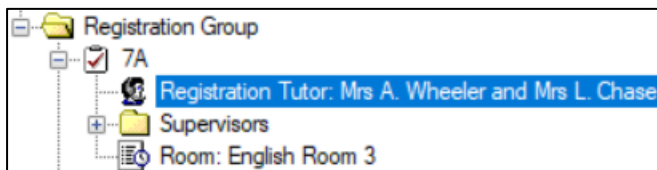
NOTE: Within SIMS, the name of the **Primary Registration Teacher** will appear **first** on class lists. The responsibility of deciding which member of staff is recorded as the primary Registration Tutor lies with the school.

Possible suggestions are the member of staff who teaches the greater number of hours or the member of staff who is first alphabetically?

4. Add the **Second Registration Tutor** as a Supervisor. **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 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.

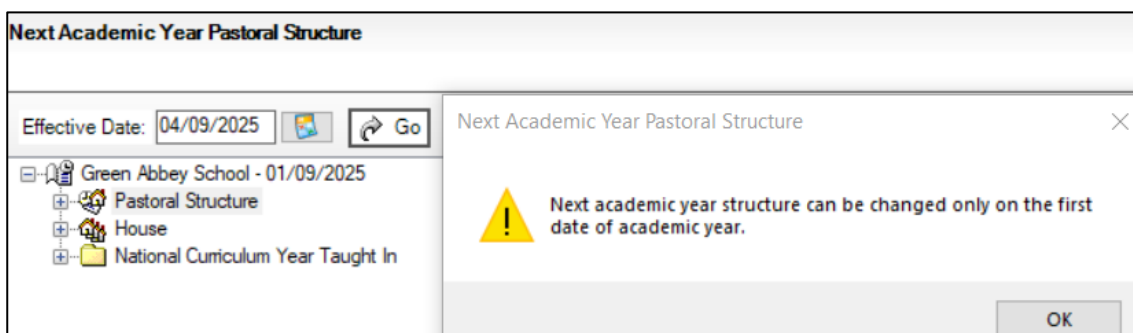
Allocating Applicants to Registration Groups/Classes

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

- clicking the  **Application** icon on the SIMS Home Page, **or**
- by selecting **Focus | Admissions | Application**, **or**
- imported via an ATF or CTF, **and**
- applied the appropriate application status for each applicant (refer to **Accepting Applicants**).

NOTE: Students attending your School for the first time eg. Y7 or Y12 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**, expand the **Year Group** until the **Registration Group** folder is visible under the required year.
5. **Right-click** the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

The **Name**, **Sex**, 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:

- **Students** – select this check box to display any on-roll students who have been assigned to any class within the selected year. These students 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.

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

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 Print Actions

Name	Gender	Year Group	Reg Group	7A	7B	7C	7D	7E	7F
Achmed, Dobir	Male	Year 7		✓					
Davis, Amy	Female	Year 7			✓				
Honeywell, George	Male	Year 7						✓	
Snape, Louisa N	Female	Year 7				✓			
Tang, James	Male	Year 7					✓		

Actions
☒ Gender
☒ Year
☒ Reg
☐ House
☐ Ethnicity
☐ Previous School
☐ Admission no.
☐ Date of Birth
☒ View Single
☐ View Triple

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

Chapter 4 Recording 2024/25 Leavers

Introduction

The facility to record leavers enables accurate records to be kept of students after they have left the school. Students should only be marked as leavers if you are sure they are leaving, eg. Year 11, Year 13.

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

The facility to record leavers enables accurate records to be kept of students after they have left the school. During the summer term you will need to mark most, or all the students as leaving on the same day. You should only mark students as leavers if you are sure they are not going to change their mind.

DfE Statutory Guidance

There are various criteria to follow for student leavers as per the DfE Guidance ***Working Together to Improve School Attendance (August 2024)***.

In-Year Leavers (those not at the end of phase of Education):

223. Where a pupil is transferring to another school, the original school must delete the pupil's name from the admission register as soon as they are entered on the admission register of the new school. The new school must enter the pupil's name on the admission register on the first day that it has agreed or been told the pupil will attend the school as explained under Expected First Day of Attendance.

As the DfE have also advised that leaving dates should be in alignment with dates that the school is open and cannot be during holidays, it is presumed that the last day of your summer term would be used.

Year 11 Leavers:

265. A pupil ceases to be of compulsory school age on the last Friday in June of the school year in which they reach the age of 16.

The official leaving date for Year 11 pupils, who will be 16 before 31st August 2025, is Friday 27th June 2025.

After this date, those students who you anticipate will return into Year 12 in September can remain on roll and may be marked with code 'X' non-compulsory school age.

Post 16 Leavers:

Whilst there is no defined date of leaving for post 16 learners, the ESFA understand that most students leave in the summer as soon as they have completed either their last exam or handed in their last marked assignment for the year, therefore that is our recommendation.

Refer to The Education (Pupil Registration) (England) Regulations 2006 (and amendments) Paragraph 8 for complete guidance.

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.

IMPORTANT NOTES:

Refer to **CME Guidance "Children who have moved away without an identified school place | Moving within the UK | Moving Overseas"** issued in January 2023 for the removal of pupils off roll.

Pupils Moving House: If a pupil is moving house, enter an end date to their address and all family members linked to that address (incl. contacts and other siblings).

If you do not have the forwarding address, enter the **Postcode** as 'XX99 9XX and **Street name** of 'Moved Out of County'.

Pupils Leaving the Country: Follow **CME (Children Missing in Education) guidance:**

<https://schoolsweb.buckscs.gov.uk/behaviour-wellbeing/children-missing-education/>

If a pupil has left the country, enter an end date to their address and all family members linked to that address (incl. contacts and other siblings).

Enter the **Postcode** as 'XX99 9XX and **Street name** of 'Moved Overseas'.

Pupils Leaving the England/Wales Maintained Sector: When a pupil moves to a non-maintained school or one outside of England and Wales, the CTF destination code MMMMMMMM should be used. This enables the CTF to be stored securely and to be available if the pupil returns to a maintained school. Each such file should hold information on only one pupil.

Important Note for ALL Leavers



To ensure that information required for statutory returns, is accurate and up to date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, eg. Ethnicity and First Language.

Important Notes regarding Year 11 Leavers



We recommend for schools with sixth form, that Year 11's are marked with attendance code X from the last official compulsory attendance date and **not** 'officially' removed from roll until after Summer results day/Sixth Form enrolment day. Experience shows that students are likely to change their mind regarding their Post-16 destination and this can therefore be carried out retrospectively when the final information is accurate.

Important Notes regarding Post 16 Leavers

SIMS has automatic procedures to help you with course completion information for Post-16 students, and therefore it is necessary to consider when to make use of the Leavers routine.

Some schools will have left the course completion date as the default date when all classes finish. Such a date is not correct for many Post-16 students who will finish the course and leave the school some weeks before the rest of the school finishes for the year.

There are two scenarios; both should be considered carefully.

Scenario 1 – for Year 13 this has best effect in Course Manager

If you make use of the Leavers routine in advance of the students leaving, SIMS will do the following:

- The planned end date for the course will be set in line with this ‘expected’ (actual) leaving date and when the School Census is run, the courses will be interpreted as having been **completed**. (Although it is acknowledged that the planned end date will have changed and that is not what the DfE would expect, this method causes least work in Course Manager.)

Scenario 2 – for leavers in Year 12 this has best effect in Course Manager

If the Leavers routine is run after the students have left and the course end date was in the future, SIMS will do the following:

- The end date will be interpreted as a **withdrawal or transfer** before the course was completed.

Both scenarios can be rectified on an individual student basis via Maintain Course (**Tools | Academic Management | Course Manager | Maintain Course**), but it is much easier if the Leavers routine is run at the appropriate time.

Update Course Memberships should be run (via **Tools | Academic Management | Course Manager | Update Course Memberships**) before moving the system to the new academic year and should be run again after moving to the new academic year, once class information is in place. Update Course Membership is an Academic Management routine and like other routines in this area, it is academic year based.

If you forget to run Update Course Memberships before moving to the new year, you can easily solve the problem by going back to the old year and running Update Course Membership.

If you forget to run Update Course Memberships, as soon as class information is in place, you can run it in the new academic year. However, you should be aware that course membership is much like other group membership, and courses are set active or inactive at midnight on the date it is run, depending on what membership they have at that time.

So, if you do not run Update Course Memberships until the actual day of the census, the courses will remain set to inactive until the next day. Active and inactive is only a display parameter, but it could cause unnecessary confusion on Census Day.

Contact the ICT Schools Team 01296 383500, option 1 if you require further assistance or guidance.

Recording Year 11/Year 13 “End of Phase” Leavers

- Select **Routines | Students | Leavers**.
- Search** for the required student.
- Double-click their name to display **Manage Student(s) Leaving Details** page.
- To assign a group of students as leavers, **Search** on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required students using any of the following methods.

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

5. From the **Select** drop-down menu, select **All** to select all the students displayed in the browser.
6. To select a group of students, **highlight them** using either of the following methods:
 - Hold down the **Ctrl** key and click each student to be selected.
 - To highlight sequentially listed students, click the first name in the list, hold down the **Shift** key and click the last name in the list.
7. Once the required students have been highlighted, click **Select** to add them to the **Students** panel.

Manage Pupil(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving Reason for leaving End of phase transfer - Maintain

Destination after Leaving Green Abbey Secondary School

Destination Institution Green Abbey

Destination Expected Start Date Grounds for Removal

8. In **Panel 1: Leaving Information**, enter the **Date of Leaving** or click **Calendar** and select the required date.
9. Select the **Reason for leaving** from the drop-down list, eg. **Normal leaving age – Higher Education Institutions**.
10. Enter the **Destination after Leaving**.

This information should be obtained for the **End of Phase Y11 and Y13 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**.

11. **Highlight the relevant students** using the **Ctrl** and **Shift** keys then clicking their names.

1 Leaving Information

Date of Leaving Reason for leaving End of phase transfer - FE/6th

Destination after Leaving Aylesbury College Group

Destination Institution

Destination Expected Start Date Grounds for Removal

Learning Aim Withdrawal Reason

2 Students

Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution
Abimbola, Deon	11	11A	005306	02/09/2019				
Adams, Ethan	11	11B	005307	02/09/2019				
Ahmed, Maryam	11	11C	005308	02/09/2019				
Akeman, Rebecca	11	11E	005406	02/09/2019				
Allen, Eva	11	11D	005309	02/09/2019				
Altenburg, Fieda	11	11E	005310	02/09/2019				
Anwar, Aleena	11	11F	005311	02/09/2019				
Arkel, Irene	11	11F	005407	02/09/2019				
Astoni, Sonya	11	11F	005408	02/09/2019				
Astwick, William	11	11E	005409	02/09/2019				
Bailey, Malakai	11	11F	005312	02/09/2019				
Baker, Fiona	11	11D	005410	02/09/2019				
Barnes, Rachel	11	11E	005313	02/09/2019				
Barnett, Anthony	11	11C	005411	02/09/2019				
Bassett, Joseph	11	11B	005412	02/09/2019				

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

2 Students									
☐	Name	Year Group	Reg. Group	Adm. No.	Date of Admission	Date of Leaving	Reason for Leaving	Destination	Institution
☐	Abdullah, Tamwar	11	11A	005566	07/09/2020				
☐	Adeyemi, Abegu...	11	11A	005466	07/09/2020	27/06/2025	End of phase tran...	Aylesbury C...	
☐	Allen, Bathany	11	11B	005467	07/09/2020				
☐	Allen, Elsie	11	11C	005468	07/09/2020	27/06/2025	End of phase tran...	Aylesbury C...	
☐	Allen, Louie	11	11D	005469	07/09/2020				
☐	Alsop, Miss Sop...	11	11E	005470	07/09/2020	27/06/2025	End of phase tran...	Aylesbury C...	
☐	Andersen, Mia	11	11F	005471	07/09/2020	27/06/2025	End of phase tran...	Aylesbury C...	
☐	Anderson, Sara	11	11A	005472	07/09/2020				
☐	Andrews, Ewan	11	11B	005473	07/09/2020				
☐	Bagri, Noor	11	11C	005474	07/09/2020				
☐	Barker, Nicolas	11	11D	005475	07/09/2020	27/06/2025	End of phase tran...	Aylesbury C...	
☐	Beynon, Harvey	11	11B	005567	07/09/2020				

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

13. **Repeat** until all students have leaving details assigned to them.

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

To remove a student 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 students then click **Clear**.

Re-enter the information as required.

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

For students leaving at **End of Phase** a “**removal from roll notification form**” is **not** required to be submitted to the Buckinghamshire LA.

Recording Students Leaving “Out of Phase” / “In Year Transfer”

Follow steps **1 – 10** above to record leavers in **Year 10 and below** who are leaving school.

For **Out of Phase** leavers:

1. Open the **Destination Institution** and **Search** for the relevant school.
2. Select **OK**.
3. Add **Destination Expected Start Date**
4. Add **Grounds for Removal**.

Additional Notes:

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 student 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 students are leaving school and remaining at their current address **do not** enter an address end date on the pupil or family record.
- Where students 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.

Exporting Common Transfer Files (CTF)

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 students are moving from primary to secondary schools.

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

If schools request the CTF's before the end of the academic year, a further CTF will need to be resent, after the end of the academic year to ensure the full attendance record is included.

- Ensure the relevant students 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

For students (including Year 11's attending another school for sixth form); there is a legal requirement to send a CTF to the receiving school no later than 15 days after the day on which a student ceases to be registered at your school. However, it can be sent in advance when students reach the end of a school phase.

Select **Routines | Data Out | CTF | Export CTF**.

1. Select **General** to display the **Export CTF** page.
2. In the **Data to be Exported** panel, ensure that 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 ☒

SEN Information ☒

Attendance Summary ☒

Student Address ☒

Assessment Data Include KS1 Tasks/Tests ☒

Programme of Study(PoS) Assessments ☒

Student Contacts ☒

School History ☒

FSM History ☒

Looked After ☒

Select Cancel

NOTE: Infant schools exporting CTF's to a Junior/Combined school, ensure the 'Include KS1 Tasks/Tests' is ticked.

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

2 Student Options

Effective Date 27/06/2025 View Current students

Include students already exported ☒

Refresh Students

- Tick the **Include students already exported** tick box.
- Click **Refresh Students** to update the list of students displayed based on your selections.
- To change the display order, click any of the **column headings**.
- 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 students as follows:
 - Hold down the **Ctrl** key and click each student to be selected.
 - To highlight sequentially listed students, click the **first name** in the list, hold down the **Shift** key, then click the **last name** in the list.
 - To select all the students, right-click anywhere in the table and click **Select All** from the pop-up menu.
- Once you have multiple students selected, **left click** in the **Destination School** column for the last student highlighted.
- Click the **drop-down** and select the **Destination School** for the selected students.
- Once all students have the correct destination recorded, click **Export CTF** to create the export file(s).
- An **Address Tidy Prompt** will appear on screen, select **Yes**.

SIMS.Net

CTF Export can cause problems where addresses are untidy or duplicated.

You may want to check with your System Manager that Address Tidy and Merge has been run recently before you proceed with CTF Export.

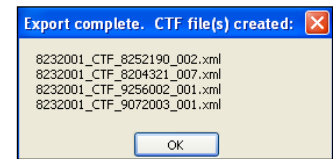
Do you want to continue with CTF Export?

Yes No

- 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.

13. 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**.



14. After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of students in the file, the number processed, and the number not exported.
15. Check the **Number of students in the file matches the Number of students processed**.

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

4 Exception Log

Number of students in file120

Number of students processed120

Number of students not exported:0

UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
U820432109004	Allen	Barry	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	Burroughs	Anita	F	11/10/2003	No LEA number found for Greenacres...	8234321_CTF_822LLLL_001
A820432109010	Burroughs	Anita	F	11/10/2003	No School Number found for Greenac...	8234321_CTF_822LLLL_001
A820432109010	Burroughs	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

Messages regarding requests for CTF's with specific pupil names should be send through the messages section of **School to School (s2s)** on the DfE Sign In Portal.

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 students 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 students in the case there are any exceptions.

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

Pastoral Promotion Procedure

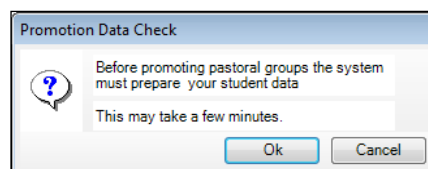
Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. **However, it must be done before the start of the academic year.**

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

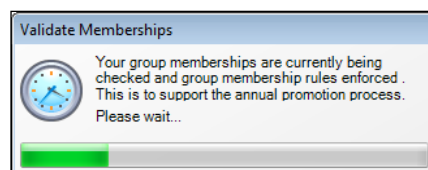
BEFORE PROCEEDING: Check you have carried out the following:

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

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



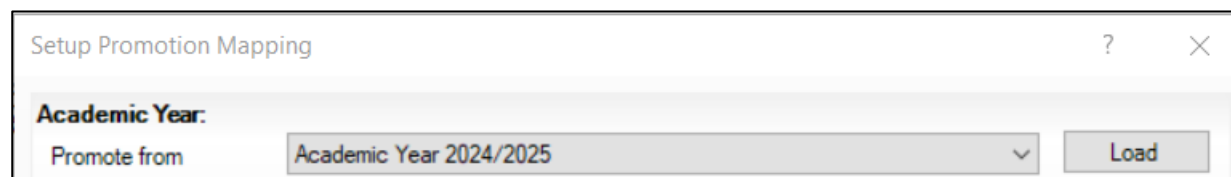
- Click **OK** to display the **Validate Memberships** message dialog, which shows the progress of the validation process (this process may take some time to complete).



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 7 is promoted to Year 8** 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
7	8
8	9
9	10
10	11
11	12

Override membership ☒ [Set Default]

Registration Group

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year 7	7A	8A	Mrs Anne Wheeler	☐	☐
Year 7	7B	8B	Mrs Edith Waters	☐	☐
Year 7	7C	8C	Mrs Lynn Chase	☐	☐
Year 7	7D	8D	Mrs Anita Abell	☐	☐
Year 7	7E	8E	Mrs Selina Andrews	☐	☐
Year 7	7F	8F	Mr Martin Unwin	☐	☐

Override membership ☒ [Finish]

- 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 students will be promoted from the **Promotion Path** column drop-down list. **Repeat this process** for **all** the classes.
- 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 students to the correct class.

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

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

- Tick **'Override membership'**.

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

If you repeat the promotion process, you can decide whether to overwrite the existing memberships by choosing the check box, as required.

Eg. if you originally selected students in **7A** class be promoted to **8C** class and subsequently wanted them to go from **7A** to **8F**, you must select the **Override Membership** check box in the **Class** panel.

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.

- Click **Finish** and then **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.

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

Save Map Filter Customize Links						
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group	
+ Current Year Group: 7						
+ Current Year Group: 8						
+ Current Year Group: 9						
+ Current Year Group: 10						
+ Current Year Group: 11						
- Current Year Group: 12						
Alsop, Sabrina	☐	12	13	G	G	
Andrews, Wyatt	☐	12	13	H	H	
Aston, Finlay	☐	12	13	J	J	
Astwick, Gwenneth	☐	12	13	M	M	

Setting the Promotion Path for Individual Students

Used where there may be a move in Registration Group for individual students.

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

Save Map Filter Customize Links						
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group	
+ Current Year Group: 7						
- Current Year Group: 8						
Abbot, Ben	☐	8	9	8D	9D	
Adam, Briony	☒	8	9	8A	9C	
Aguilera, Christopher	☐	8	9	8C	9C	
Ahlman, Victor	☐	8	9	8B	9B	

2. Customise the view on this screen by selecting an option from the **Customize** drop-down list.

Select **Sort** to display the **Sort** dialog, to enable you to order the contents of the columns, as shown in the following example.

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

Select **Columns** to display the **Customise Columns** dialog, to choose the columns you want to include in the display.

Show Column	Column Name
☒	Unusual
☒	Current Year Group
☒	Next Year Group
☒	Current Registration Group
☒	Next Registration Group
☐	Current National Curriculum Year
☐	Next National Curriculum Year

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

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

- Hold down the **Ctrl** key, then click each student you want to select.
- To highlight sequentially listed students, click the first name in the list, hold down the **Shift** key, then click the last name in the list.

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
☐ Current Year Group: 7					
Abbot, Clarissa	☒	7	8	7A	
Able, Benjamin	☐	7	8	7B	8B
Adams, Kathryn	☐	7	8	7C	8C
Addison, Avril	☒	7	8	7D	
Addison, Graham	☒	7	8	7E	
Ahmad, Arfa	☐	7	8	7F	8F
Akhtar, Amanat	☒	7	8	7A	
Akhtar, Rahana	☐	7	8	7B	8B
Akram, Amina	☒	7	8	7C	
Al Amin, Ranjit	☐	7	8	7D	8D

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

For example, a student currently in **Year 7** would normally be expected to promote into **Year 8**.

It is possible (for whatever reason) that this student will be promoted into the Next National Curriculum **Year 7** in the forthcoming academic year.

To achieve this, click **Filter** and select the required **Year Group** and **Registration group** from the drop-down lists.

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

Part Two - Academic

Chapter 6 Transferring the 2025/26 Timetable to SQL

Introduction

The curriculum plan and timetable in Nova-T represents a *snapshot* of how classes are organised and scheduled. Once complete, this data must be transferred to SQL.

NOTE: If your school uses the SIMS Cover module and use non-teaching registration periods to provide registration cover, ensure these registration periods are set up as 'non-teaching' in your cycle. There is no need to make changes to period type settings.

Preparing for Export to SQL Using Curriculum Matching

Before you carry out a transfer of curriculum and timetable data to SQL, you should carry out these steps:

- Ensure the **Document Management Server** is active.
In SIMS, check: **Tools | Setups | Document Management Server**.
- If you have not done so recently, run **Tools | System Diagnostics | Database Diagnostics** in SIMS.

Manage Classroom Staff

When the timetable is imported, the wizard attempts to match the staff codes mentioned in the import file with the staff codes in Manage Classroom Staff for the relevant academic year. When the 'next' academic year was created, Classroom Staff will have been carried forward into it, i.e. Classroom Staff with a staff code in the current academic year *and* a staff role on or after the last day of the *current* academic year, will have been given a staff code in the *next* academic year. Please refer to Personnel in SIMS guidance.

Classroom Staff added subsequently to the current academic year will also have been carried forward to the next. However, before attempting to transfer the new timetable, it is worth checking the classroom staff list for the next academic year.

1. Select **Focus | Person | Manage Classroom Staff** to display the **Find Classroom Staff** browser.
2. Check the member of staff has not already been allocated a **Staff Code** by selecting the new **2025/2026** academic year from the **Academic Year** drop-down list.
3. Select **Yes** from the **has staff code?** drop-down list.
4. Click **Search**. Check the list of classroom staff returned. If any staff to be imported on the timetable are not present, you will need to add them, as described in the *Academic Management* handbook available from the Documentation centre on the SIMS HomePage.



Completed

Starting the Export from Nova-T6

Before the export can be completed, the Timetabler needs to assign levels to classes in Nova-T6 via **Tools | Assign Levels** (where Nova-T6 has been used to construct the new timetable).

1. Ensure you have loaded the relevant SPL file for the new academic year.
2. Select **Data | Export Curriculum and Timetable to SQL**.

As the academic data stored in the SQL database is historical, a date range for the exported data must be provided so that the records transferred have start and end dates. In this case, as you are setting up the timetable for the coming year you should pick a date range corresponding to the whole of the **Working Academic Year** (it is recommended that the start date is the first day that students are expected in school in the Autumn Term and the last day of the Summer Term in July. For example, 04/09/2025 -22/07/2026).

3. If prompted, you should log into the SQL database with a suitable username and password.

The Curriculum Matching Wizard

Validation checks are carried out on your data prior to the first page being displayed. For example:

- the supplied start and end date must lie within a single academic year.
- the supplied start and end date must lie within a single timetable cycle.
- the shape of the supplied timetable cycle must match the one in SQL. One exception to this is that the transfer is still allowed on the first export of non-teaching periods to SQL.

If any of these checks fail, the transfer will be unable to proceed. Click **Help** for further information on resolving these issues or refer to **Curriculum Matching in the Nova-T6 Links** chapter of the **Maintaining Nova** handbook.

Otherwise if all the checks are passed, you may proceed by clicking **Next**.

*NOTES: The whole curriculum will be unlinked as there is nothing in the database for the new academic year to which the bands, block groups and classes can be linked. All items on the left-hand side of the **Merge Curriculum** page are highlighted in orange because they are unlinked. This is as expected.*

Similarly, on the right, a message is displayed explaining that there is no curriculum data in the database (except bands if these have previously been exported). This is as expected – it refers to the selected academic year.

On subsequent transfers, the appearance will be different, as it is expected that most (if not all) of the submitted curriculum will be automatically matched with the data in the database.

The final page of the wizard prompts you to confirm that you wish to continue with the transfer process. To do this, click **Submit**. The submission may take a couple of minutes to execute and during this time a rotating graphic is displayed. After it has completed, click **Finish** to close the wizard.

Unmatched Teachers and Rooms

After the wizard has closed, Nova-T6 analyses the data returned and if any teachers or rooms were not found or recognized in SQL, these are listed. In such cases, classes associated with teachers or rooms that could not be identified are recorded in SQL, except that the teacher or room assignment will be missing (see **Manage Classroom Staff**).

NOTE: Teachers will be exported to SQL only if they are employed for the whole of the export date range.

Exporting Derived Year Classes to SQL

NOTE: Please ignore this section if your school does not use derived years.

Year groups in Nova-T6 are associated with National Curriculum Years (NC Years). A derived year (containing students from one or more years) must be associated with one of the National Curriculum Years concerned (e.g. NC Year 12 and 13). Classes that contain students from both Year 12 and 13 can then be included in the export to SQL. In Academic Management, Year 12 and 13 students will be eligible for the classes in the derived year.

Applying the Timetable to the 2025/2026 Academic Year

IMPORTANT NOTE: *Lesson Monitor and Cover will not work for the new academic year until this process has been completed successfully.*

The purpose of this routine is to take each day in the specified date range and map it to a day in the timetable cycle. For example, 4th September should be mapped to Thursday, and so on.

Previous mappings can be overwritten. This may be necessary if mappings had previously been applied to the whole year, or if changes are required.

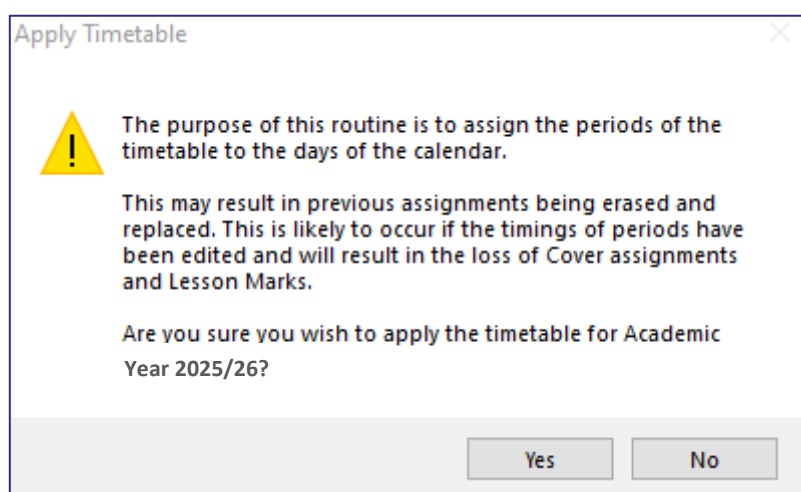
IMPORTANT NOTES:

Cover will only be able to record cover arrangements as far into the future as the timetable has been applied.

Remapping a day will result in the loss of any Cover arrangements made for that day together with any lesson marks.

It is important to note that if you are using Lesson Monitor and have already used **Tools | Select Periods for Sessions** in preparation for printing registration sheets, then you must select the periods for sessions again after applying the new timetable.

1. Select **Tools | Academic Management | Apply Timetable**. A message dialog prompts for confirmation that you want to proceed.



2. Click **Yes** to display the **Map calendar dates to timetable days** dialog.

Map calendar dates to timetable days

Period: Academic Year 2024/2025 Date Range: 01/09/2024 - 31/08/2025

Timetable Model: Cycle 01/09/2024 - 31/08/2025

Date Range: From 01/09/2024 To 31/08/2025

Method: ☒ Use default days ☐ Select start point

04/09/2024 maps to Timetable day: Wed

Apply

Date	Status	Timetable day
01/09/2024 Sun	None	
02/09/2024 Mon	None	
03/09/2024 Tue	None	
04/09/2024 Wed	Full	Tue
05/09/2024 Thu	Full	Wed
06/09/2024 Fri	Full	Thu
07/09/2024 Sat	Full	
08/09/2024 Sun	Full	
09/09/2024 Mon	Full	Fri
10/09/2024 Tue	Full	Mon
11/09/2024 Wed	Full	Tue
12/09/2024 Thu	Full	Wed
13/09/2024 Fri	Full	Thu
14/09/2024 Sat	None	
15/09/2024 Sun	None	
16/09/2024 Mon	Full	Fri

Click on the 'Status' or 'Timetable day' column of a row to edit the status or timetable day.

OK Cancel Help

If more than one **Timetable Model** exists, select the required one from the drop-down list.

- Specify the date range to which you want to apply the timetable (e.g. dates of the next term) by entering dates in the **From** and **To** fields. Alternatively, click the **Calendar** buttons and select the dates from the calendars.

NOTE: The date range must be within the dates of the timetable model.

Two methods are available for mapping calendar dates to timetable days. Select either the **Use default days** or **Select start point** radio button.

Use default days - This method always maps a calendar Monday to timetable Monday, a calendar Tuesday to timetable Tuesday, etc.

*NOTE: If a ten-day timetable cycle is in use, after selecting the **Use default days** radio button you must select a starting timetable day. For example, whether to map 04/09/2025 to Thursday Week 1 or Thursday Week 2.*

Select start point - If you select this method, dates when the school is open are mapped to timetable days regardless of the day of the week. For example, if Friday 6 December is timetable day 5 and Monday 9 December is a staff training day, then Tuesday 10 December is mapped to timetable day 6. It is possible, however, to avoid this situation by applying the timetable to each term separately (using **From** and **To** dates).

Within the specified date range, the system identifies the first date that does *not* have a status of **None** and is displayed in the bottom left-hand corner of the dialog. In the following graphic, the date selected from the drop-down list is shown as **04/09/2025 maps to Timetable day**.

- Select the timetable day that you want this date to start on from the **dd/mm/yyyy maps to Timetable days** drop-down list.
- Click **Apply** to validate your selections and apply the mapping. The resulting mapping is displayed in the **Timetable day** column.

Map calendar dates to timetable days

Period: Academic Year 2024/2025 Date Range: 01/09/2024 - 31/08/2025

Timetable Model: Cycle 01/09/2024 - 31/08/2025

Date Range: From 01/09/2024 To 31/08/2025

Method: ☒ Use default days ☐ Select start point

04/09/2024 maps to Timetable day: Wed

Apply

Date	Status	Timetable day
01/09/2024	Sun	None
02/09/2024	Mon	None
03/09/2024	Tue	None
04/09/2024	Wed	Full
05/09/2024	Thu	Full
06/09/2024	Fri	Full
07/09/2024	Sat	None
08/09/2024	Sun	None
09/09/2024	Mon	Full
10/09/2024	Tue	Full
11/09/2024	Wed	Full
12/09/2024	Thu	Full
13/09/2024	Fri	Full
14/09/2024	Sat	None
15/09/2024	Sun	None
16/09/2024	Mon	Full

Click on the 'Status' or 'Timetable day' column of a row to edit the status or timetable day.

Save Cancel Help

7. Click **Save** to save the data and apply the timetable.

Lesson Monitor

If the timetable cycle has changed (extra or reduced periods, change of times etc.) ensure this new cycle is reflected in **Lesson Monitor Set-up**.

Failure to do so will result in lessons missing from a teacher's timeline. We recommend that this is checked as part of the transfer process to avoid issues in the new year.

Tools | Set Ups | Lesson Monitor Options | Lesson Monitor Setup

1 Registration and Periods Pattern

Timetable Models: Cycle 02/12/2023

AM PM

	1	2	3	4	5
Mon	A				P
Tue	A				P
Wed	A				P
Thu	A				P
Fri	A				P

Highlight the cells that belong to the AM session, then click the AM button. Repeat for the PM session. You can select a block of cells by clicking in the top left cell, then Shift-clicking in the bottom right cell.

Type A in the cells to show where AM registration occurs each day and type P to show where PM registration occurs. If you hold registration before or during a period then type A or P in that period. If you hold PM registration after last period then type N into last period.

Chapter 7 Promotion into the 2025/26 Academic Structure

Introduction

Students need to be allocated to **bands**, **curriculum groups** and **classes**. This can be achieved using any of the following **four** methods:

1. Copying memberships from the previous year using Academic Promotion.
2. Importing memberships arranged using Options. Refer to the relevant guidance for the Options package used by your school.
3. Manual entry, by placing ticks on the tick grids, or using the Student Curriculum Summary page.
4. Exporting and importing student memberships using a spreadsheet.

Academic Promotion Procedures

The purpose of the Academic Promotion functionality is to generate curriculum memberships in the *next* academic year for all the groups of a scheme in one go, based on equivalent memberships of classes and other curriculum groups in the *current* academic year. There are two steps to the Academic Promotion routine:

- Setting up the promotion rules via **Routines | School | Academic Promotion Rules**.

Refer to the *Academic Promotion in SIMS* chapter in the *Academic Management* handbook for more information.

- Applying the rules using the **Curriculum Promotion** wizard (from the tick grid on the **Group Memberships in Scheme** page, click **Allocate** and select **Curriculum Promotion Wizard**. (For more information, refer to the *Academic Promotion in SIMS* Chapter in the *Academic Management handbook* available from the Documentation Centre on the SIMS Homepage).

IMPORTANT NOTE: Before running the Academic Promotion process, you are strongly advised to take a full and verified backup of your SIMS SQL database. This is a powerful process that creates many student group memberships.

Once the promotion rules have been set up, you need to apply the rules using the **Curriculum Promotion** wizard from the **Curriculum Scheme** tick grid.

Important Information Regarding Academic Promotion

Before using the Academic Promotion process, note the following points:

Academic Promotion can take place only if the academic year into which promotion is taking place:

- has been defined in SIMS (for the purposes of Academic Promotion, only the term start and end dates are required. The remaining dates, such as half-term, training days, etc. can be added later.
- contains curriculum data exported from Nova-T.
- has been selected as the *current* academic year in Academic Management.

For example, if you want to promote from academic year 2024/2025 to 2025/2026, you must select 2024/2025 as your current academic year (via **Tools | Academic Structure | Set Academic Year** or clicking on the Academic Year shown on the SIMS HomePage).

Once the academic year has been defined, you must run **Pastoral Promotion** to ensure that the students are in the correct years and National Curriculum years for the new academic year.

You must then transfer the curriculum and timetable from Nova-T6 into the new academic year.

In most Secondary schools, automatic Academic Promotion will apply to years 10-11 and years 12-13, because these pairs of years represent the delivery of two-year courses (GCSE courses are generally delivered during years 10-11 and AS/A Level courses during years 12-13). However, this does not preclude the use of Academic Promotion across other National Curriculum year combinations, such as years 7-8, where you might want to preserve sets in Maths, English, and Modern Languages for example.

The Academic Promotion process for a scheme in the next academic year is run from its tick grid. A column named **Promotable** is available in the **Find Curriculum Scheme** browser, from which you should open a **Promotable** scheme.

IMPORTANT NOTE: *Academic promotion must be run for each scheme whose groups you want to promote with memberships from the previous academic year, one scheme at a time. It is not possible to promote all the required schemes at the same time. The reason why there is not a single promotion routine for all schemes, is that it would then be difficult to deal with any exceptions that might arise. It is important to promote the schemes in a logical order, starting with the band schemes and progressing down to the block schemes and non-singleton cluster schemes (cluster schemes with more than one destination group, e.g. a cluster scheme that provides a linked class arrangement).*

The **Curriculum Promotion** wizard can create a group membership in the new academic year for a student only when certain conditions are fulfilled. At each stage, there might be individual students who do not meet these conditions. The promotion routine will report these, and you will need to consider them on an individual basis. Such exceptions might be evidence of errors in the data, such as missing National Curriculum year memberships, or of multiple or missing memberships within the scheme in the previous academic year. You must resolve these and other cases manually.

The promotion process can be repeated as many times as you want for the same scheme, until the promotion is performed to your specific needs. For example, a promotion could be performed based on a **Reference Date** of 10 June and later repeated for the **Reference Date** of 17 July, which is nearer to the end of the Summer term. This would be particularly useful if there is a change to the student population or a change to the group memberships for the selected scheme, perhaps due to an end-of-year assessment.

NOTE: *To populate group memberships in the new academic year, the **Reference Date** is the date student group memberships are read.*

Advice on Running Academic Promotion

It is **strongly** recommended that you **promote bands** before promoting any other groups. Promoting students to their new groups higher up the hierarchy ensures that they will automatically be eligible for memberships lower down the hierarchy for the appropriate groups.

For example, assigning a student to band 7x automatically makes them eligible for the groups associated with 7x Maths, 7x English, 7x Science, etc. If bands are not promoted first, all students in year 7 would be ineligible for membership of all the groups associated with that year.

Promoting bands first would also lead to a reduction in the number of warning messages being displayed when running Academic Promotion.

Running Academic Promotion

IMPORTANT NOTE: Before running the Academic Promotion process, you are strongly advised to take a full and verified backup of your SIMS SQL database. Changes to student group memberships are not saved to the database until you take the conscious decision to click **Save** on completion of the promotion. However, this is a powerful process that creates many student group memberships.

The Academic Promotion process must be run for *each* of the schemes you want to promote.

Once the promotion has been performed on a scheme it can be saved and you can move onto the next one.

Academic Promotion can be run as many times as required. This would be particularly useful if a group was inadvertently removed from the promotion process and the data was saved. Even if the data is saved, the process can be run once more, and this will correct the data. The most recent promotion of a scheme will be set as *current* in the database.

Please Note: It is always recommended that clarity is provided as to which groups promote into each other. Not all groups will promote as some classes may change and therefore this process would be better carried out using SYLK files (see **Exporting and Importing Student Group Memberships**)

- 1. Select **Routines | School | Academic Promotion Rules** to select the Academic year you want to promote into.

Academic Years		
Select the academic year you want to promote into		
Academic Year 2025/2026	01/09/2025	31/08/2026
Academic Year 2024/2025	02/09/2024	31/08/2025
Academic Year 2023/2024	01/09/2023	01/09/2024
Academic Year 2022/2023	01/09/2022	31/08/2023
Academic Year 2021/2022	02/09/2021	31/08/2022
Academic Year 2020/2021	03/09/2020	01/09/2021
Academic Year 2019/2020	02/09/2019	02/09/2020
Academic Year 2018/2019	01/09/2018	01/09/2019
Academic Year 2017/2018	01/09/2017	31/08/2018
Academic Year 2016/2017	01/09/2016	31/08/2017

- 2. In the **Academic Promotion Rules** screen select the **NC year** and the **Scheme Type** you wish to promote. We recommend you start with **Bands**.

NCYear: [dropdown] Scheme Type: Bands Mode: Previous Year

Schemes (Academic Year:)

Scheme Name	Ancestor Scheme	Status
-------------	-----------------	--------

Possible Ancestor Schemes (Academic Year:)

Ancestor Scheme

Groups for Selected Scheme

Group Name	Staff	Ancestor Group	Link Status
------------	-------	----------------	-------------

Possible Ancestor Groups

Ancestor Group	Staff	Mapped
----------------	-------	--------

<<Link>> >Unlink<

Confirm and Save

- Click on **Base Band in the Scheme for the Academic Year 2025/2026** (Base bands in Year 8) and then click on the **Ancestor Scheme for the Academic Year 2024/2025** (Base bands in Year 7) to match the two schemes.

This will populate possible **Ancestor Groups** in the lower right quarter of the screen and where links are suggested/mapped highlight either side and then, click on the '<<Link>>' icon to link the schemes. If the suggestions are correct there is no need to 'Link' and you can go straight to Step 5.

Before linking

Groups for Selected Scheme				Possible Ancestor Groups		
Group Name	Staff	Ancestor Group	Link Status	Ancestor Group	Staff	Mapped
8x		7x	Suggested	7x		Yes
8y		7y	Suggested	7y		Yes

After linking

Groups for Selected Scheme				Possible Ancestor Groups		
Group Name	Staff	Ancestor Group	Link Status	Ancestor Group	Staff	Mapped
8x		7x	User Linked	7x		Yes
8y		7y	Suggested	7y		Yes

- Click **Confirm and Save** to complete the process.

Once all Bands have been linked, then continue with **Blocks** and **Clusters**.

NCYear:
 Scheme Type:
 Mode:

Schemes (Academic Year 2024/2025)			Possible Ancestor Schemes (Academic Year 2023/2024)	
Scheme Name	Ancestor Scheme	Status	Ancestor Scheme	
8x Reg Groups		None	7xy Citizenship	
8x English		None	7x Teaching Groups	
8x Exp Arts	7x Teaching Groups	2 of 3	7x Maths	
8x Maths	7x Maths	Full	7x PE	
8x Modern Lang		None	7x Technology	
8x PE	7x PE	Full	7y Teaching Groups	
8x Technology	7x Technology	Full	7y Maths	
8y Reg Groups		None	7y PE	
8y English		None	7y Technology	
8y Exp Arts	7x Teaching Groups	1 of 3		
8y Maths		None		

Groups for Selected Scheme				Possible Ancestor Groups		
Group Name	Staff	Ancestor Group	Link Status	Ancestor Group	Staff	Mapped
8y/A1	KB	7BLU	User Linked	7BLU		Yes
8y/Dr1	RW			7GRN		Yes
8y/Mu1	GD			7RED		Yes

Assigning Students to Curriculum Groups

Once all groups that are able have been promoted, navigate to:

Focus | School | Academic Structure | Curriculum Assignment by Scheme to display the Find Curriculum Scheme browser.

1. Enter search parameters and click **Search** to display all the schemes in the curriculum plan or press **Enter** without entering any search parameters.

Scheme Name	Type	Sourced by	Destination Groups	Promotable	Is PX Scheme
Base bands in Year 10	Bands	Year 10	Band 10x, 10y, 10z	No	
Base bands in Year 11	Bands	Year 11	Band 11x, 11y, 11z	No	
Base bands in Year 12	Bands	Year 12	Band 12x, 12y, 12z	No	
Base bands in Year 13	Bands	Year 13	Band 13x, 13y, 13z	No	
Base bands in Year 8	Bands	Year 8	Band 8x, 8y	Promotable	No
7xy Citizenship	Block	Band 7x, 7y	Class 7A/Ci, 7B/Ci, 7C/Ci, 7D/Ci, 7E/Ci, 7F/Ci	No	
7x Teaching Groups	Block	Band 7x	Group 7RED, 7GRN, 7BLU	No	
7x Maths	Block	Band 7x	Class 7x/Ma1, 7x/Ma2, 7x/Ma3	No	

NOTE: Setting the promotion rules via **Routines | School | Academic Promotion Rules** places **Promotable** in the **Promotable** column of the **Find Curriculum Scheme** browser. A scheme displaying **Promotable** has at least one destination group that is the target of a promotion path defined in SQL. Any scheme with a blank **Promotable** column cannot be promoted, as no promotion path that points at any of its groups has been defined. It will not be possible to run the **Academic Promotion** wizard for schemes that display a blank.

2. Highlight the required scheme and click **Open** to display the **Select Effective Date Range** dialog.

Select Effective Date Range

Academic Year 2024/2025

☒ **Named Date Range**

Name	Date Range
Academic Year 2024/2025	01/09/2024 - 31/08/2025
<Working Academic Year>	04/09/2024 - 23/07/2025
<Autumn Term - Christmas Holiday>	01/09/2024 - 05/01/2025
<Spring Term - Easter Holiday>	06/01/2025 - 21/04/2025
<Summer Term>	22/04/2025 - 23/07/2025

☐ **Custom Date Range** From: 04/09/2024 To: 23/07/2025

☐ Restrict date range from today to end

☐ Don't ask me again (this session or until manually changed)

OK Cancel

3. Select a date range from the **Named Date Range** list or select a **Custom Date Range** to be used for the Academic Promotion and click **OK** to display the tick grid.

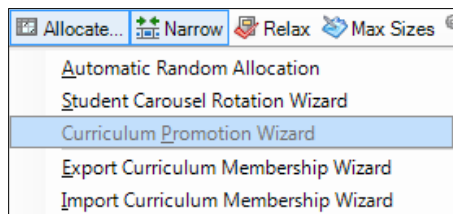
New memberships created by the promotion process will be for the date range selected here. For example, you could select the predefined dates for the following academic year. The selection defaults to the **Working Academic Year** of the currently selected academic year, which will usually be the appropriate option for this purpose.

Select the mode in which you want to work, either **Relaxed Mode** or **Strict Mode**.

Click **Relax** to suspend the eligibility rules so students can be allocated to groups for which they are ineligible.

Once you have clicked this button, the background on the button changes to indicate that relaxed mode is selected. Alternatively, if you want to ensure that eligibility rules for student class memberships are enforced (*Strict Mode*), make sure that the button is deselected. Strict mode is the default.

4. Start the Academic Promotion process by clicking **Allocate** and selecting **Curriculum Promotion Wizard** from the pop-up menu.



Follow the instructions provided in the wizard. On opening the wizard, a warning indicates that any student tags or selections on the tick grid are removed if you proceed. This is because tagging is used to indicate any students for whom a membership was not created by the promotion process.

If you need to make a note of the tagged and/or selected students before they are cleared, click **Cancel** to return to the tick grid. Start the **Curriculum Promotion** wizard again when you are ready.

Any filters that have been set to restrict the students listed in the tick grid will apply when promoting the selected scheme. Students who are filtered out are excluded from the promotion process. The names of these students are displayed later in the process.

5. Click **Next** to display the **Confirm Dates** page.

The **Effective Date Range** used in the tick grid for the next academic year is displayed together with an editable **Reference Date** (the date on which student memberships are read so that group memberships are populated in the new academic year).

If the **Effective Date Range** displayed is incorrect, click **Cancel** to close the wizard and edit the **Effective Date Range** in the tick grid.

6. Select the **Reference Date** for the Academic Promotion by clicking the **Calendar** and selecting a date from the calendar.

The **Reference Date** defaults to the day prior to the start date of the new academic year, but it is probable that there will be no student memberships at that time. The date used must lie within the academic year prior to the new academic year and often would be chosen near, or possibly at the end of, the Summer term. However, if your school completes its 'normal' curriculum early in the year (e.g. the end of June) and for the rest of the year students are placed into different groups for a special project and you ran the promotion process and accepted the default Reference Date, there would be a danger that the promotion would not find the student memberships to promote. Instead, editing the **Reference Date** to the day before these short-term groups came into effect would ensure that the original curriculum is promoted.

7. Click **Next** to display the **Select Groups** page.

The groups affected by the Academic Promotion are displayed for review. These will be the groups associated with the selected scheme in the tick grid on the **Group Memberships in Scheme** page.

Define the groups you want to include as part of the Academic Promotion by selecting or deselecting their associated check boxes.

NOTE: It is not possible to continue until at least one group has been selected.

It might be necessary to remove groups from the promotion process if, for example, you want to reduce the number of Maths classes in the following year (for example from three to two). This would mean that the students in the third Maths class would need to be evenly distributed to the two remaining to ensure they still get taught Maths this year. After the wizard has assigned students to **8x/Ma1** and **8x/Ma2**, you can assign those who were in **8x/Ma3** to either of the other two remaining groups manually, using the tick grid.

When the groups have been selected, the system can identify the students whose group memberships *next year* will be affected by the promotion process. These students appear as editable in the tick grid (i.e. they are listed with a white background) and were members of corresponding groups in the previous year, on the selected **Reference Date**.

8. Click **Next** to continue.

A warning is displayed if a student is known in the new academic year but was unknown in the previous academic year. This might occur if, for example, a student joins your school at the start of the new academic year.

9. Click **Yes** to continue. The selected students will be included as part of the promotion process.

The number of students who were members of groups in the previous academic year, but do not appear in the tick grid for next year, is displayed.

*NOTE: Students who were members of a group in the previous academic year, but who are not eligible for the next year group or have been filtered out of the tick grid, cannot be promoted. A student who is displayed in the tick grid with a read-only row (yellow background) can be promoted only if you have clicked **Relax**. The number of students who could potentially be promoted but have no membership of the appropriate group in the previous academic year, will also be displayed. This is very unlikely to happen, unless you have selected an inappropriate **Reference Date**, and no students have a membership on the selected date.*

10. Click **OK** to continue. The number of students who could have been promoted, but were filtered out of the tick grid, is displayed.

11. Click **OK** to continue.

The number of students who, at the **Reference Date** in the previous academic year, were members of more than one group belonging to the scheme, is displayed. This is possible, although highly unusual. Such student memberships will not be promoted. If you want to assign such students to a group, you must do this manually.

12. Click **OK** to continue.

The number of students whose row in the tick grid was read-only on entering the **Curriculum Promotion** wizard is displayed. Their class memberships will not be promoted to the new academic year. To enable these class memberships to be promoted to the new academic year, you should close the wizard and relax the eligibility rules by clicking **Relax**. You can then run the wizard again and the students will not be displayed in this list.

13. Click **OK** to display the **Current Settings** page.

This page displays a summary of the information that will be used when promoting academic data to the next academic year and is based on the options previously selected in the wizard. This information includes:

- the **Effective Date Range** (over which the new memberships will be created)
- the **Reference Date** (on which previous memberships will be read)
- the mapping of groups from the previous year to the groups of the *next year* scheme that you have selected for promotion and the names of students who could not be promoted for various reasons (detailed previously).

14. Click **Next** to continue.

Promoted memberships are displayed on the tick grid but are not yet saved to the database. The changes can still be rejected by clicking **Undo** once the wizard has been closed.

Once the Academic Promotion process has been completed successfully, the final page of the wizard is displayed and informs you that the process has been completed.

15. Click **Finish** to close the wizard and return to the tick grid.

Those student group memberships that could not be promoted (ie. because of their status on the tick grid, or not having a membership on the **Reference Date**, etc.) are tagged automatically.

To display all tagged students at the top of the tick grid, right-click anywhere on the tick grid and select **Sort by | Tagged** from the pop-up menu. This enables the subsequent manual assignment of students to their new classes.

16. Click **Save** to save the changes of the Academic Promotion process.

Only after clicking **Save**, are the changes made by Academic Promotion saved to the database.

Unassigned students can be identified by a flag ('o') in the **Flag** column.

- Right-click the **Flag** column to display a menu.
- Sort the column to bring flagged students to the top of the list. Ticks can be manually entered as required.

Student Name	Reg Group	Assigned	Flag	8x	8y
☒ Tang, James			o		
☐ Abbot, Ben *	7D	8y			✓
☐ Adam, Briony *	7A	8x		✓	
☐ Aguilera, Christopher *	7C	8x		✓	
☐ Ahlman, Victor *	7B	8x		✓	
☐ Akeman, Richard *	7A	8x		✓	
☐ Akeman, Steven *	7A	8x		✓	
☐ Alamilla, Sofia *	7B	8x		✓	

17. Continue to use the **Curriculum Promotion Wizard** to populate schemes.

The same principles can be applied to other academic promotion scenarios.



Exporting and Importing Student Group Memberships

The export and import of student membership's function can be used extensively at year end to allocate students to classes where the student membership is not 'promotable' (like for like) in the previous year.

This involves the exporting of a tick grid (similar to Excel) so that a head of department can put ticks in boxes in the spreadsheet. The class memberships can then be imported back into the SIMS scheme from the spreadsheet.

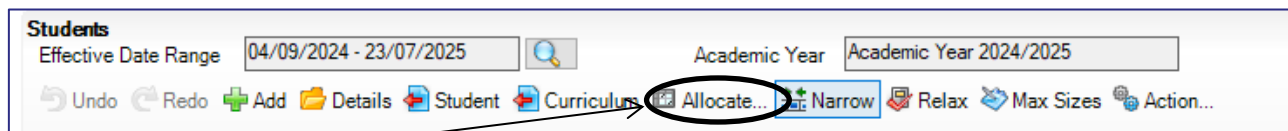
The process uses a file format called **Symbolic Link (SYLK)**. SYLK is roughly the spreadsheet equivalent of the RTF format used with Word Processors and Reporting Packages. The advantage of the SYLK format is that it can be used by virtually any spreadsheet program.

Exporting a SYLK File

Dates within screenshots are for example only.

Note: if you intend to create populated files from this current year's allocations, as a guide for teachers, change to the current academic year and change the date ranges according when importing back into SIMS.

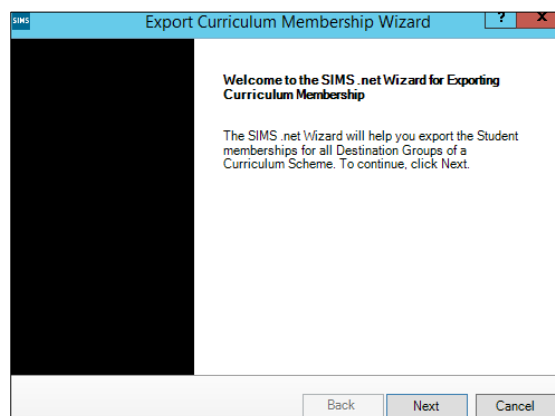
1. Select **Focus | School | Academic Structure | Curriculum Assignment by Scheme**.
2. Select the relevant scheme.
3. Select **Working Academic Year** from the **Named Date Range** section.



4. Click **Allocate** and select **Export Curriculum Membership Wizard**.

5. An introductory screen is displayed.

6. Click **Next**.



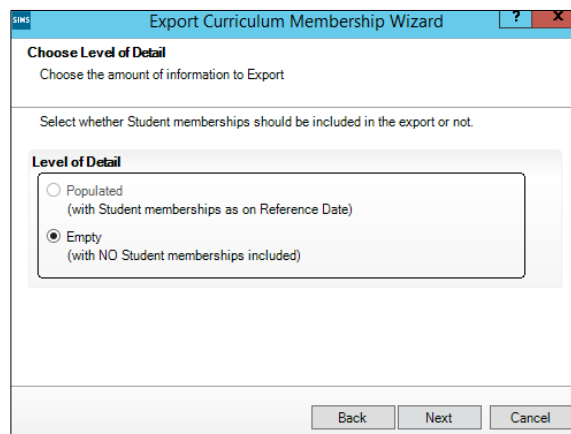
7. The **Reference Date** field defaults to the day before the beginning of the effective date range unless the start date is the first day of the working academic year, in which case it is the same day.

8. Click **Next**

9. **Populated** and **Empty** refer to the ticks, rather than the students. In a grid without ticks populated is greyed out.

Populated – document contains student memberships identified (ticked) as at the day before the reference date

Empty – document contains a list of students but not memberships identified.

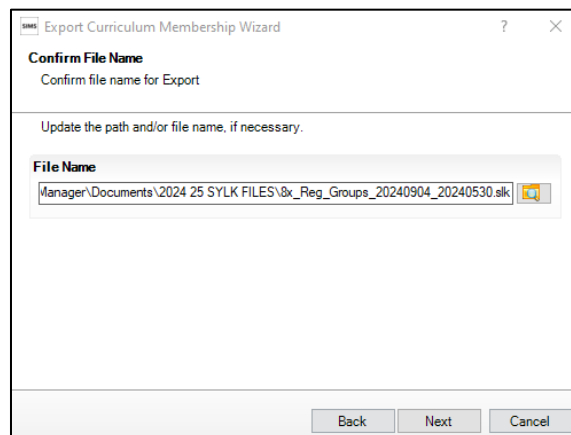


Schools should decide which document would be relevant to the current situation – ie. are the bulk of students remaining in the same class OR is there a complete re-shuffle.

10. Click **Next**.

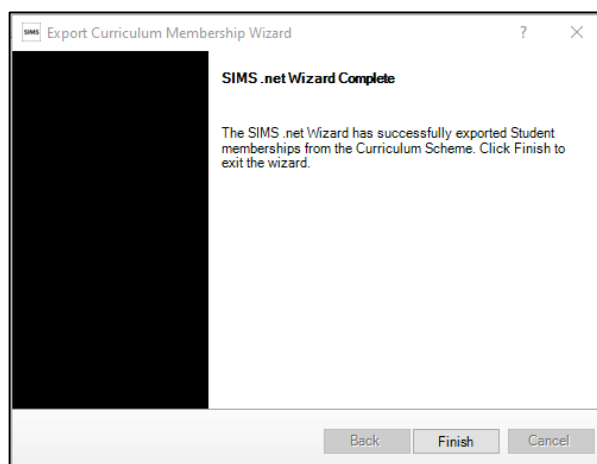
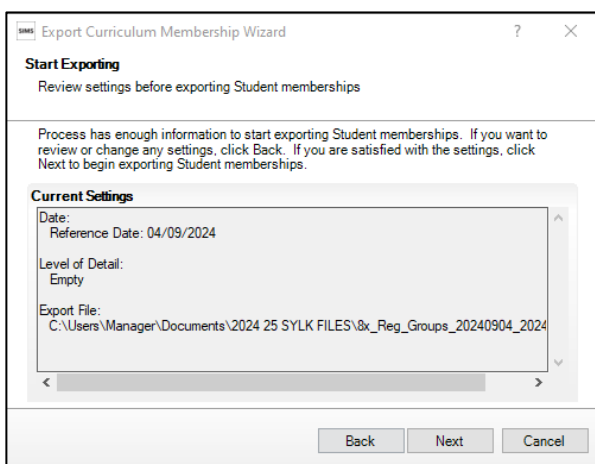
11. SIMS creates a name for the file and a default path to save it to. The file name includes the name of the scheme, the reference date and the current system date.

If necessary the path may be changed by clicking **field browser** and navigating to a preferred location. This location is stored and will be the default on subsequent occasions



Choose a suitable location for the file (for example, this may be on a shared drive) and then click **Save**. The new path and name will now be displayed in the **File Name** field.

12. Click **Next**, note the summary information and click **Next** again.



13. Click **Finish** to complete the process.

The process is complete and a file has been created with the extension **.slk**.

There should now be a file in the desired location, with the file name as set in the **Export** wizard with a symbol indicating it can be loaded into Excel.

Name	Date modified	Type	Size
 8x_Reg_Groups_20240904_20240530.slk	30/05/2024 14:55	Microsoft Excel SL...	11 KB

These files can now be forwarded to relevant staff making the decisions on the new allocation of students.

How to populate memberships

The following instructions may be used to advise staff on their course of action to populate/change the membership of classes:

1. Double-click the file and Excel will open with the **Export** file.

NOTE: If Excel is opened and the file is searched for, the File Type should be changed to SYLK to display the correct files.

- Once the file is open, select the whole spreadsheet by clicking in the top-left corner adjacent to column A and row 1.
- Select the corner cell at the left to select all the spreadsheet and double click the join between adjacent cells in the headings to automatically adjust the width of the columns so that all the data is visible.

1	2	3	4	5	6	7	8
1	Student N Gender	Year Grou	Reg. Grou	House	AdNo	ExportID	DoB
2	Aaron, Ch Male	8	8A	Hooke	004986	41634E2D	01/09/200
3	Aaron, Jas Male	8	8B	Newton	004987	41634AB7	08/03/200
4	Aaron, Liz Female	8	8C	Fleming	004988	41634E2E	01/09/200
5	Ansell, Al Male	8	8C	Hooke	004995	41634EB8	14/02/200

The last three columns are headed with the names of the three groups. These correspond to the columns in the SIMS scheme and should be changed to reflect the names for the following Academic Year (see screenshot below). You need to enter either an upper or lower case T to denote a tick. Characters except the T or t will not be imported back into SIMS, but will not cause the import to fail completely.

Student Name	Gender	Year Grou	Reg. Grou	AdNo	ExportID	DoB	QCA Y8 Maths Level	9x/Ma1	9x/Ma2	9x/Ma3
Abhra, Abjit	Male	8	8A	005625	41635700	20/11/2007				
Abhra, Alisha	Female	8	8C	005626	41635701	20/11/2006				
Adams, Brianna	Female	8	8A	005628	416354C8	15/01/2016				
Addington, Travis	Male	8	8C	005629	416354D1	15/09/2006				
Balinski, Iwa	Female	8	8C	005637	4163570F	14/03/2016				
Barclay, Sadie	Female	8	8B	005638	416354DA	26/10/2006				

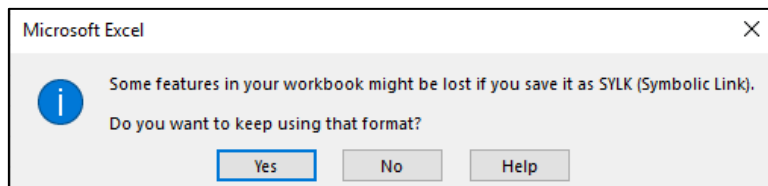
As per the Academic Management handbook it is possible to add the students' most recent assessment results recorded in SIMS to assist with 'setting'.

Place students in their groups by placing a t or T in the class column to which they should be allocated.

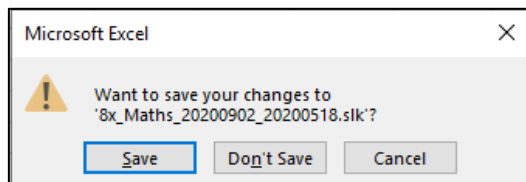
Student Name	Gender	Year Grou	Reg. Grou	AdNo	ExportID	DoB	QCA Y8 Maths Level	9x/Ma1	9x/Ma2	9x/Ma3
Abhra, Abjit	Male	8	8A	005625	41635700	20/11/2007		T		
Abhra, Alisha	Female	8	8C	005626	41635701	20/11/2006		T		
Adams, Brianna	Female	8	8A	005628	416354C8	15/01/2016		T		
Addington, Travis	Male	8	8C	005629	416354D1	15/09/2006		T		
Balinski, Iwa	Female	8	8C	005637	4163570F	14/03/2016		T		
Barclay, Sadie	Female	8	8B	005638	416354DA	26/10/2006		T		
Bello, Elijah	Male	8	8A	005639	416354CD	26/03/2017		T		
Bennison, Hugo	Male	8	8B	005640	41635708	03/02/2016		TT		
Benson, Justin	Male	8	8C	005641	41635709	22/06/2016		T		
Bevan, Osian	Male	8	8A	005643	41635459	23/09/2007		T		
Bhatti, Soraya	Female	8	8C	005644	4163541A	23/12/2005				T
Carlson, Billy	Male	8	8A	005648	41635714	03/03/2016		T		
Clapham, Margaret	Female	8	8B	005650	416354A0	17/09/2006		T		
Colbeck, Vivian	Male	8	8B	005652	416354A3	05/01/2015				T
Davies, Katherine	Female	8	8A	005658	41635710	02/12/2007		T		
Del Sonno, Nadia	Female	8	8B	005659	41635711	23/01/2017		T		
Denholm, Lynden	Male	8	8C	005660	416354A9	19/05/2016		T		

NOTE: It is possible to re-sort the spreadsheet if the header row is left at the top and still successfully import the file. It is important that the export ID data is not altered.

- Click **Save** and in response to the prompt regarding format click **Yes**.



5. Close the spreadsheet and click **Don't Save** when prompted.



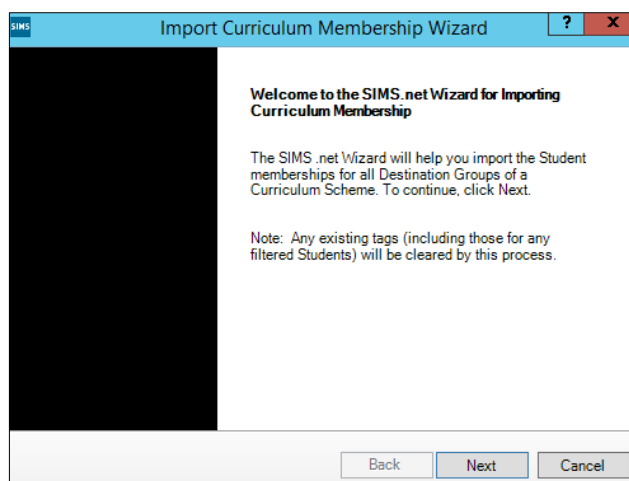
NOTE: Clicking Save will cause Excel to ask the question about format and to ask again about saving.

Once this is completed SIMS administrators should follow the next steps to re-import the curriculum for the new academic year.

Importing Populated Membership file

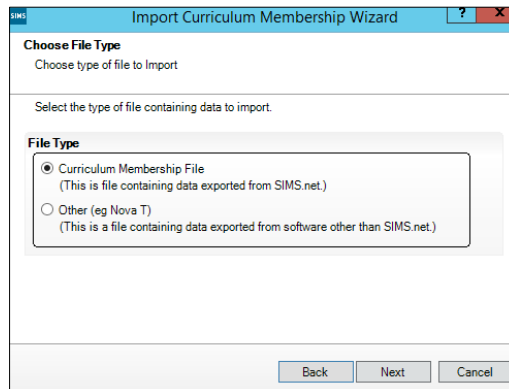
NOTE: When an import is carried out the wizard checks to ensure that the column headings in the SYLK file match those in the scheme. So long as the group names exactly match those in the scheme the process will work successfully.

1. In SIMS ensure you are in the **Academic Year 2025/2026**.
2. Select **Focus | School | Academic Structure | Curriculum Assignment by scheme** and select the band/block that you wish to populate and select the **Working Academic Year 2025/2026**
3. Click **Allocate** and select **Import Curriculum Membership Wizard**.
4. Click **Next** and check the effective date range is for the **Working Academic Year 2025/2026**.



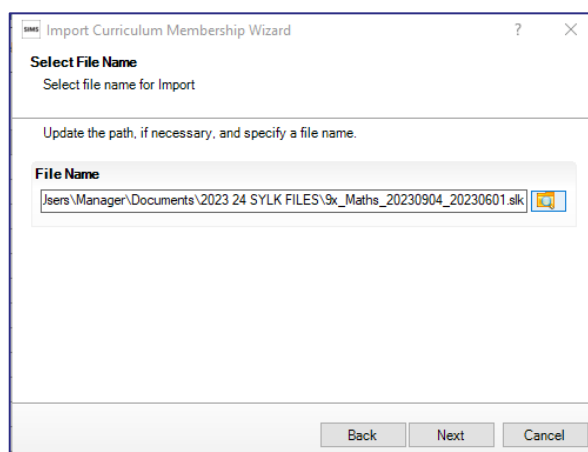
The effective date range cannot be changed from within the wizard. If it is incorrect, you should click **Cancel**, change the date range in the normal way and start the import again.

5. Click **Next**, leave the file type as the default.
6. Then click **Next** again.

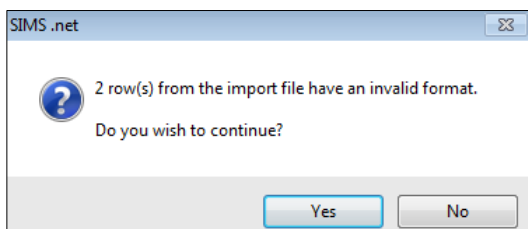


The default file name is unlikely to be correct and serves as a reminder of the scheme into which the data is about to be imported. It may be necessary to browse to the location of the file and select it by clicking **Save** in the **browse** screen.

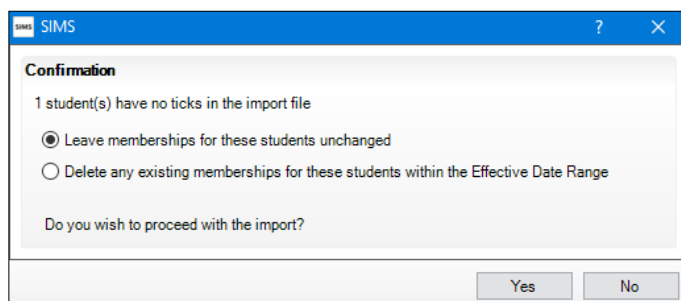
7. Continue through the wizard by clicking **Next**.



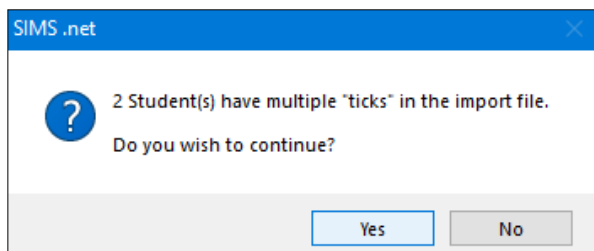
The screenshots below indicate the various prompts you may receive relating to any mistakes made when entering data into the spreadsheet.



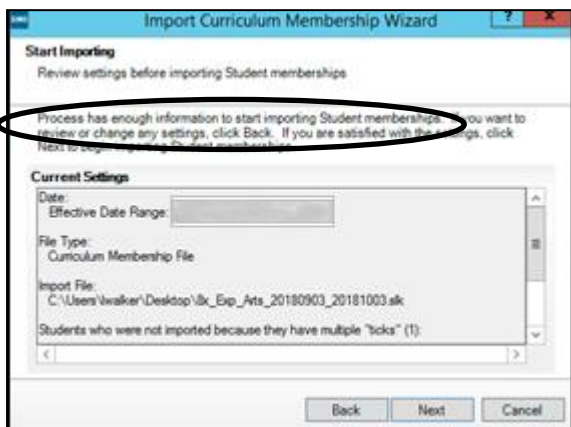
This relates to students with letters other than t or T entered on the spreadsheet.



This relates to students for whom no data was entered. Note the options. It is possible to use SYLK import to add data without affecting existing entries.



This relates to a student who has a t in more than one cell.



If students had multiple ticks, then the message outlined will be displayed.

7. Click **Finish**. The result of the import is shown in the following graphic.

Student Name	Reg Group	Assigned	Pe	QCA Y8 Maths Level	9x/Ma1 (LV)	9x/Ma2 (FB)	9x/Ma3 (DM)
☐ Abhra, Abjit *	8A	9x/Ma1		7	✓		
☐ Abhra, Alisha *	8C	9x/Ma1		6	✓		
☐ Adams, Brianna *	8A	9x/Ma1		6	✓		
☐ Addington, Travis *	8C	9x/Ma1		6	✓		
☐ Balinski, Iwa *	8C	9x/Ma1		6	✓		
☐ Barclay, Sadie *	8B	9x/Ma1		6	✓		
☐ Bello, Elijah *	8A	9x/Ma1		7	✓		
☐ Bennison, Hugo	8B		o	6			
☐ Benson, Justin *	8C	9x/Ma1		6	✓		
☐ Bevan, Osian *	8A	9x/Ma1		7	✓		
☐ Bhatti, Soraya *	8C	9x/Ma3		5			✓
☐ Carlson, Billy *	8A	9x/Ma1		6	✓		
☐ Clapham, Margaret *	8B	9x/Ma1		6	✓		
☐ Colbeck, Vivian *	8B	9x/Ma3		5			✓
☐ Davies, Katherine *	8A	9x/Ma1		7	✓		

- A student with a 'o' in the **Flag** column has no entry in the grid. This will be a student for whom there were multiple ticks.
- Students with no entries within the group for whom entries were made are the students who had incorrect characters entered.
- Corrections can be made as necessary

8. When you have finished assigning students to their classes, select

Tools | Academic Management | Course Manager | Update Course Memberships.

This routine should always be run when any changes to class memberships are made.

If required, class lists can be printed via **Reports/Student List/Class List** and changing the date forward to the start of the Academic Year.

☐ **Completed**

Chapter 8 Printing Timetables and Class Lists

Introduction

In SIMS, the menu route **Reports | Timetables** provides access to timetable printing routines to print both student and staff timetables. **Student timetables** can only be printed when students have had their curriculum allocations outlined in the previous section completed.

Staff timetables can only be printed when a complete timetable has been sent from Nova-T to SIMS. This is normally undertaken by the school Timetabler.

Printing Student Timetables from SIMS

1. Select **Reports | Timetables | Student Timetable(s)** to display the Student Selection screen.
2. Change the **Effective Date** to a date after the start of the new academic year, for example **04/09/2025** then click **Refresh**.

Name	Reg	House
Abbot, Ben	10D	Hooke
Abbot, Clarissa	8A	Hooke
Abdelkoder, Mohamed	9C	Hooke
Abdullah, Tamwar		Hooke
Abhra, Abjit	11A	Boyle
Abhra, Alisha	11C	Boyle
Abimbola, Deon	G	Newton
Able, Benjamin	8B	Newton
Ackroyd, Marcus	9D	Fleming
Ackton, Stan	11E	Fleming
Adam, Briony	10A	Curie
Adams, Brianna	11A	Curie
Adams, James	9E	Hooke
Adams, Kathryn	8C	Fleming
Adams, Owen	9F	Boyle
Addington, Travis	11C	Boyle
Addison, Avril	8D	Boyle
Addison, Graham	8E	Curie

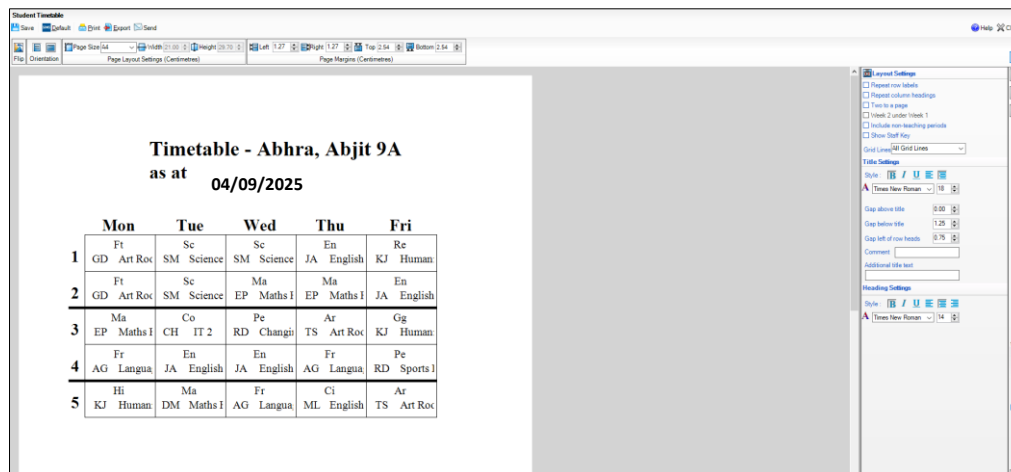
3. Click **Registration Group(s)** either select all or one year group at a time from the Available Students box.
4. Click **>** to send them to the Selected Students Box.
5. Click **OK**.

Name	Reg	House
Abbot, Ben	10D	Hooke
Abbot, Clarissa	8A	Hooke
Abdelkoder, Mohamed	9C	Hooke
Abdullah, Tamwar		Hooke
Abhra, Abjit	11A	Boyle
Abhra, Alisha	11C	Boyle
Abimbola, Deon	G	Newton
Able, Benjamin	8B	Newton
Ackroyd, Marcus	9D	Fleming
Ackton, Stan	11E	Fleming
Adam, Briony	10A	Curie
Adams, Brianna	11A	Curie
Adams, James	9E	Hooke
Adams, Kathryn	8C	Fleming
Adams, Owen	9F	Boyle
Addington, Travis	11C	Boyle
Addison, Avril	8D	Boyle
Addison, Graham	8E	Curie

Name	Reg	House
Albanie, David	9A	Hooke
Albright, Frankie	9A	Curie
Becker, Boris	9A	Fleming
Bennett, Jill	9A	Fleming
Briscoe, Benjamin	9A	Fleming
Fish, Lucas	9A	Hooke
Gant, Sandra	9A	Newton
Guntley, Mike	9A	Hooke
Hargrave, Kate	9A	Fleming
Holmes, Tom	9A	Boyle
Isaac, Lara	9A	Fleming
Lawrence, Thomas	9A	Hooke
Long, Aimee	9A	Newton
Manish, Gadhia	9A	Hooke
Maton, Julie	9A	Curie
Morey, Dominic	9A	Hooke
Nolan, Ann	9A	Newton
Parker, Logan	9A	Newton

The **Student Timetable** screen is displayed. Amendments to the cell contents can be made with the **Cell Settings** options and **Layout Settings** controls the font and layouts. **Page Layout** and **Page Margins** options are at the top of the screen.

4. Change the settings to that required for your school..



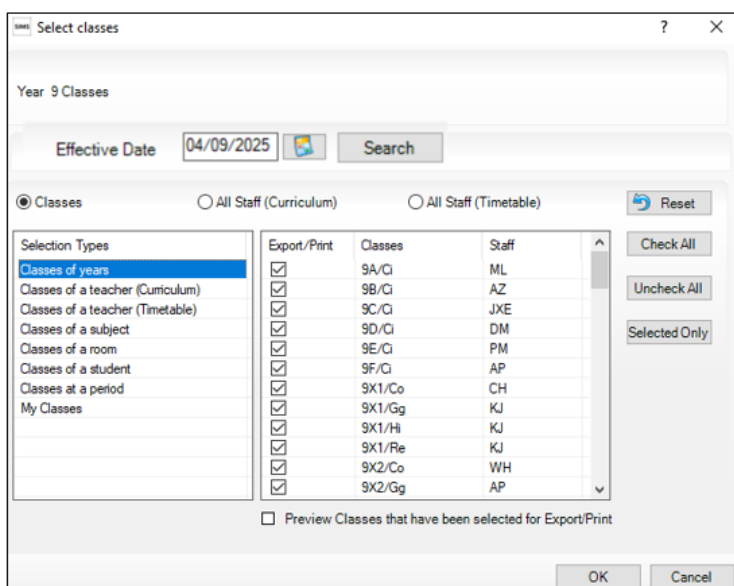
5. **Print** sends the displayed timetables to the printer. Click **Close** to return to SIMS.

Printing Individual Staff Timetables from SIMS

1. Select **Reports | Timetables | Staff Timetable(s)** to display the **Select Staff** screen.
2. Make appropriate selections, then click **OK**.
3. The **Staff Timetable** screen enables similar options to the **Student** screen above.

Printing Class Lists from SIMS

1. **Select Reports | Student list | Class List**.
2. Ensure the **Effective Date** is correct. Make the requested selection of classes and click **OK**.



The selected class list(s) will be displayed and can be printed.

Secondary & All Through Schools SIMS End of Year Procedures 2024 - 2025

Class List Report: 9AC/as

Save Browse Sort List Settings Move First Previous Next Move Last Photo Print Options Export

Font: Arial 13 Fixed Columns: 1 Row Divider: 1

Report Layout: Column Nesting: Column Options: Print

Full Name	Gender	Date of Birth	Reg Group	Year Gro
Abhra, Abjit	Male	20/11/2009	9A	Year 9
Adams, Brianna	Female	15/01/2010	9A	Year 9
Bello, Elijah	Male	26/03/2010	9A	Year 9
Bevan, Osian	Male	23/09/2009	9A	Year 9
Carlson, Billy	Male	03/03/2010	9A	Year 9
Davies, Katherine	Female	02/12/2009	9A	Year 9
Drinkwater, Jaydon	Male	17/07/2010	9A	Year 9
Farley, Chad	Male	28/02/2010	9A	Year 9
Ferdinandez, Biagio	Male	20/09/2009	9A	Year 9
Golaszewski, Marcin	Male	15/04/2010	9A	Year 9
Gowda, Biji	Female	02/04/2010	9A	Year 9
Irwin, Rose	Female	29/03/2010	9A	Year 9
Jenkins, Claudia	Female	04/09/2009	9A	Year 9
Langdon, Amos	Male	30/04/2010	9A	Year 9

3. Select Reports | Students Analysis Reports to display the list of menu routes available for analysis.

Reports	
Run Report	
Design Report	
Personnel	▶
Import	
Profiles	▶
Lesson Monitor	▶
Dinner Money	▶
Export	
Fees Billing	▶
Student List	▶
Student Analysis Reports	▶
Print Timetables	
Timetables	▶
Admissions	▶
Intouch	▶
	Student Totals for Year Groups
	Student Totals for Years and Bands
	Student Totals for Year and Registration Groups
	Student Totals for Vertical Registration Groups
	Age Breakdown for Year Groups
	Student Totals for Classes in a Year Group
	Classes Active on a Particular Period
	Student Totals for Each Subject
	Pairings for One Subject
	Ordered Totals for Subject Pairings

Chapter 9 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

- Run the missing marks report:

Focus | Attendance (or Lesson Monitor) | Deal with Missing Marks

- Run the Unexplained Absences report

Focus | Attendance (or Lesson Monitor) | Deal with 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 students joining the school.
- Invite parents of students 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 students 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 10 Routines to be Carried Out After the New Academic Year has Started

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 students with a **future admission date**.

Students 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 student 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 7	2025/2026	Autumn	Year 7	180	Active
2025/2026 - Autumn Year 10	2025/2026	Autumn	Year 10	5	Active

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

Admit Applicant Detail: 2025/2026 - Autumn Year 7

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, Sex, Date of Birth**, proposed **Date of Admission, Enrolment Status, Application Status, UPN** and whether a UPN will be assigned.

A tick grid is provided, enabling the application status to be amended as required.

The order of the display can be changed by clicking any column heading.

2 Applications

Application Status: Accepted

Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrolment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
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	Enrolment 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		Assign Permanent 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 Student'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 students who did not start or any duplicate records (ie. students 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.

Re-Admitting Students

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

IMPORTANT: It is essential that you follow the process for re-admissions (ie. for students who have left your school and subsequently return).

Do not remove the Date of Leaving as a method of re-admitting. However, if the student 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 student 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 | Student | Student Details** page and click **History** on the **Registration** panel.

- Select **Focus | Student | Student Details** to display the **Student Details** page.
- Click **New** to display the **Add Student** page.

- Enter the student's known details into the **Basic Details** panel then click **Continue**.

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

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

- If you are certain that this is the student who should be re-admitted, click **Yes**.
- 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 student's details.

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

Check for Missing Marks or Unexplained Absences

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

NOTE: Ensure all missing marks and unexplained absences for the previous terms have been dealt with before commencing the School Census Return.

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 | Lesson Monitor | Whole Group Student 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 displays the 'Official Register Report' window. At the top, there are search and print icons. Below these, the 'From' date is set to 01/09/2024 and the 'to' date is 23/07/2025. The 'Title' field contains 'Official Register'. The 'Group Type' dropdown is set to 'Whole School'. There are three checked checkboxes: 'Show Totals', 'Show Key to Codes', and 'Show History of Changes'. A fourth checkbox, 'Include changes from "N" mark', is also checked. Below this, a table with columns 'Short Name', 'Description', and 'Group Type' is visible, with 'Whole School Selected' in the 'Description' column. A 'Run a Screen Based Report' dialog box is open in the foreground, showing 'Layout Options' with 'Use a predefined layout' selected and 'Official Register' chosen from the dropdown. Under 'Output Options', 'Output to a web browser' is selected. 'OK' and 'Cancel' buttons are at the bottom of the dialog.

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.

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

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.

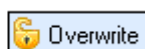
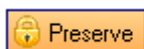
- In the following example, the pupils are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day Wednesday.

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
☐	☒	☐	☒	☐	☐	☐	☒	☐	☒

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



- 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 STUDENT'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 Student 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.

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

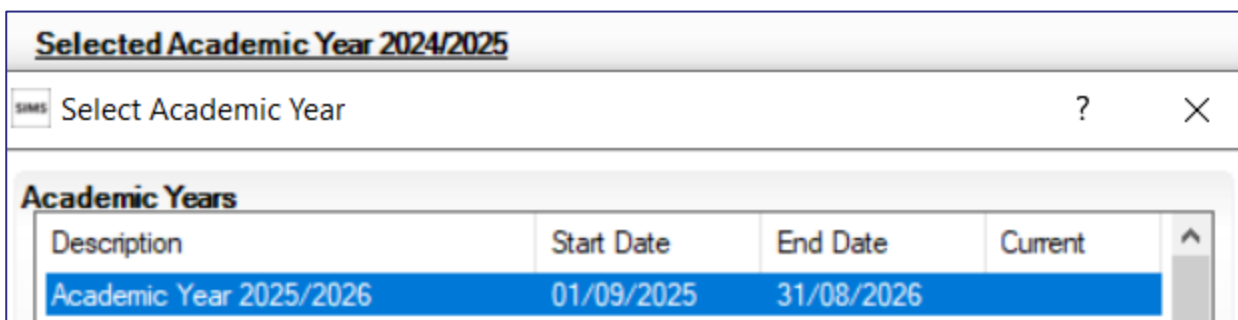
The Academic Year on the Home Page does NOT automatically update when the next Academic Year 'rolls over'. This is a manual routine, and if not updated, may affect some functionality in SIMS.

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 Students

Ensure you have received and imported a CTF for all new students 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**.

Housekeeping
Save Undo Print
1 Name Format 2 Reset Parental Ballot Flags 3 Update Mailing Point

1 Name Format
Apply To: Students / Applicants, Staff, Contacts, Agents. Options: Preferred Surname, Legal Forename, Middle Name(s), Preferred Forename. Radio buttons for UPPERCASE and Title Case. Example: Peter John O'Malley-Smith. Apply button.

2 Reset Parental Ballot Flags
This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible.
Effective Date: 01/09/2022. Include accepted pre-admission students due to be on roll on the effective date? [] Apply button.

3 Update Mailing Point
This routine identifies one pupil at each address as the mailing point. Other children at the same address will be marked as NOT the mailing point.
Effective Date: 01/09/2022. Mailing Point: Oldest Child (dropdown). Apply button.

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 student records, **Panel 5 Family/Home** and **remove the tick** from Mailing Point for required students, 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 Student, 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

Name	Title	Home Address	Telephone	Remove
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		

Update Parental Salutation/Addressee

1. Select **Routines | Student | 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, Abjit	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	
Almulla, Sofia	Mr and Mrs Almulla	No	No	Mr and Mrs M Almulla	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	Mr and Mrs Flint	Yes	Mr and Mrs J Flint	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	Mr and Mrs Heled	Yes	Mr and Mrs G Heled	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	
Kalinzi, Olivia	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 student 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 student record via **Focus | Student | Student 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 student.

Missing Parental House Icon

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

The parental contact does not have a House icon on the student record but does live with the student. 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 | Student | Bulk Update | Bulk Update Students**
2. **Student Population Panel:** Select the relevant **Group Type**, **Group**, **Effective Date** (of students 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 students.
6. Select **Save**.

OR

<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 students 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

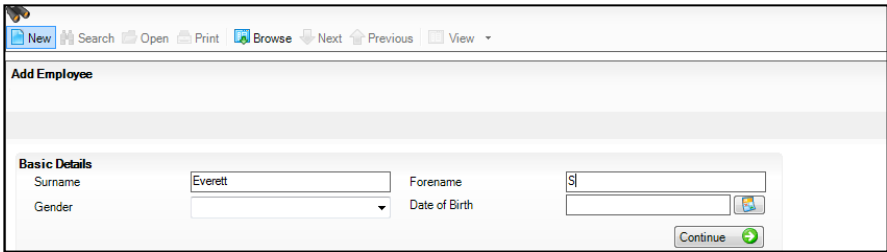
The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated leaving dates

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.

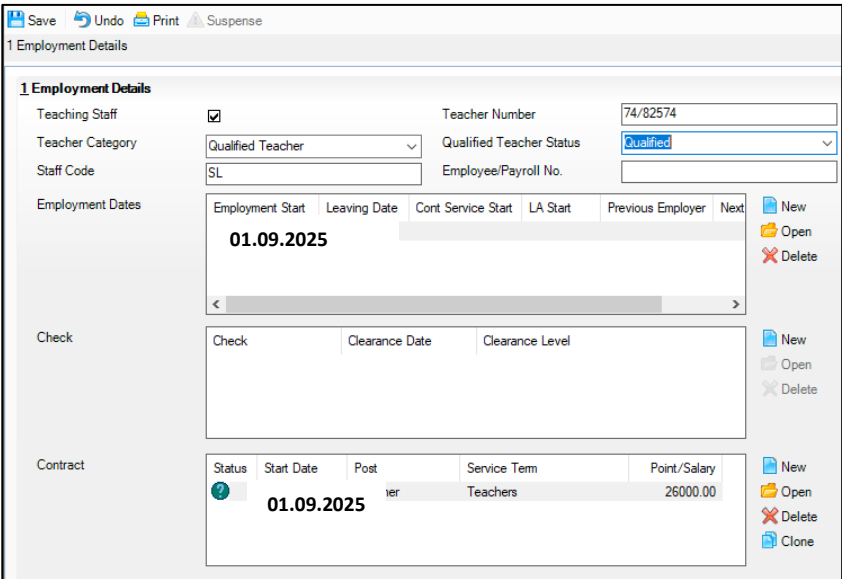
Adding New Teachers in Personnel

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.



Status	Start Date	Post	Service Term	Point/Salary
?	01.09.2025	ier	Teachers	26000.00

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 Students 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

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 for '2022/2023 - Autumn Year R'. It has two main sections:

1 Intake Group

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

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

Buttons: New, Open, Delete

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.

SIMS .net

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 an Application between Intake Groups

1. **Routines | Admission | Admission Groups | Transfer Applications**
2. This will open a page which is split into two panels.

Transfer Admission Group Members

Buttons: New, Open, Save, Undo

Links: Help, Urges, Close

Members

Intake Group: 2022/2023 - Autumn Year R
Admission Group: 2022/2023 - Autumn YR - G1

Name	Date of Birth	Gender
Ogden, Rachel	12/12/2002	Female
Williams, Ruth	05/11/2015	Female

Intake Group: 2022/2023 - Autumn Year R
Admission Group: 2022/2023 - Autumn YR - G1

Name	Date of Birth	Gender
King, Simon	20/08/2016	Male
McCann, Austin	18/02/2016	Male
Snape, Louisa N	12/11/2016	Female
Taylor, Theo	13/05/2016	Male

3. In the left-hand panel select the Intake Group, and associated Admission Group, that the student application is currently in. The left-hand panel will then populate with all the applications in this Admission Group.
4. In the right-hand panel select the Intake Group, and associated Admission Group, that the student application is transferring to. The right-hand panel will then populate with all the applications already in this Admission Group.
5. In the left-hand panel highlight the name of the student who is transferring to the new Admission Group and click on the arrow pointing to the right (between the two panels).
6. This will transfer the application into the new Admission Group.
7. Save the change.

NOTE: Students can be moved in either direction using the arrow buttons.

