



Arbor End of Year Procedures

2024 / 25

and Promotion to 2025/26

For Infant, Nursery and Primary Schools

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

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.

Revision History

Version	Change Description	Date
Version 1	Buckinghamshire Council ICT Schools Team edit Taken from Arbor dated	June 2025

This booklet is designed for use with Arbor software

**SCREEN SHOTS USED IN THIS BOOK ARE A MIX OF PRIMARY & SECONDARY.
THEY ARE EXAMPLES OF THE PROCESS ONLY**



Arbor End of Year Procedures

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Introduction

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

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

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

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

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

ICT Schools Team Support

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

School Year Set Up - What Steps have to be completed

There are eight steps in the School Year Set up; some must be completed, others are optional however, each section needs to be marked as completed to 'unlock' the next step. Those in bold are required for all schools. Other steps are optional depending on your Arbor package and requirements.

- | | |
|---|-----------------------|
| • 1. Academic Year | • 5. Houses |
| • 2. Off-Roll Leavers | • 6. Registers |
| • 3. Year Group and Registration Forms | • 7. Meals |
| • 4. Custom Groups | • 8. Interventions |

School Year Setup																			
School / School Structure / School Year Setup / School Year Setup / New School Year / Overview																			
New School Year Overview 1. Academic Calendar 2. Off-Roll Leavers 3. Year Groups and Registration Forms 4. Custom Groups 5. Houses 6. Registers 7. Meals 8. Interventions Review School Year Setup Steps to prepare for the new academic year are locked until the Academic Calendar is filled in and marked as complete. 2025/2026 <table> <tr><td>1. Academic Calendar</td><td>Incomplete</td></tr> <tr><td>2. Off-Roll Leavers</td><td>Locked</td></tr> <tr><td>3. Year Groups and Registration Forms</td><td>Locked</td></tr> <tr><td>4. Custom Groups</td><td>Locked</td></tr> <tr><td>5. Houses</td><td>Locked</td></tr> <tr><td>6. Registers</td><td>Locked</td></tr> <tr><td>7. Meals</td><td>Locked</td></tr> <tr><td>8. Interventions</td><td>Locked</td></tr> <tr><td>Review School Year Setup</td><td>Locked</td></tr> </table>		1. Academic Calendar	Incomplete	2. Off-Roll Leavers	Locked	3. Year Groups and Registration Forms	Locked	4. Custom Groups	Locked	5. Houses	Locked	6. Registers	Locked	7. Meals	Locked	8. Interventions	Locked	Review School Year Setup	Locked
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6. Registers	Locked																		
7. Meals	Locked																		
8. Interventions	Locked																		
Review School Year Setup	Locked																		

Permissions

- School: Academic Structure: Administer - amend the academic year or term dates.
- School: Calendar: Administer - add or amend holidays.

Chapter 1 Academic Calendar

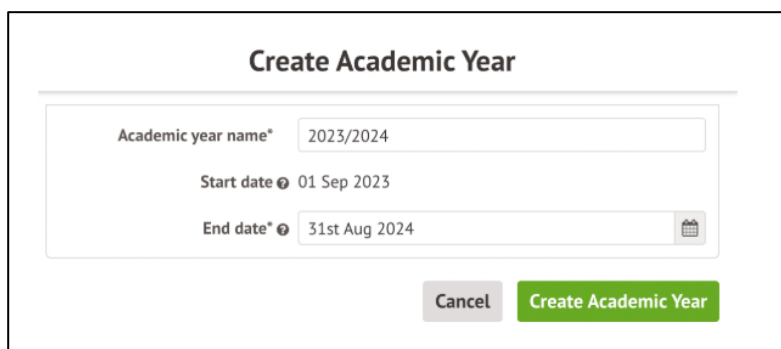
Creating the Academic Calendar

If you've already been using Arbor to manage your applicants for September's cohort, and already created the 25/26 Academic Year, make sure it's marked as **Complete** and you can skip to the next step; **2. Off Roll Leavers**.

If you haven't been using Arbor to manage applicants, you'll need to add the next academic year. Do this by following:

School / School Structure / Academic Years

1. Click on **+ Add** to set up the 25/26 Academic Year
2. Add the start date and End date
01/09/2025 – 31/08/2026
3. Click on **Create Academic Year**



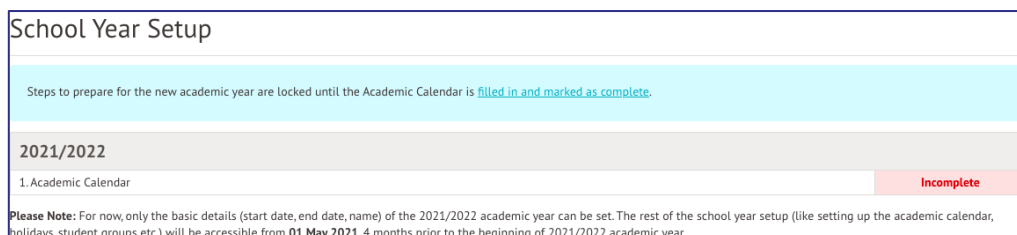

Academic Years		
2025/2026	01 Sep 2025 - 31 Aug 2026	
2024/2025	01 Sep 2024 - 31 Aug 2025	
2023/2024	01 Sep 2023 - 31 Aug 2024	

If you get an error message when trying to start your year on the 1st September, this means your academic calendar from last year finishes too late. Contact the ICT Schools Team for further assistance with this issue.

Set up the Academic Calendar

The next step is to set up your academic calendar (or check it has been set up correctly if it has already been created).

Go to **School / School Structure / School Year Setup**



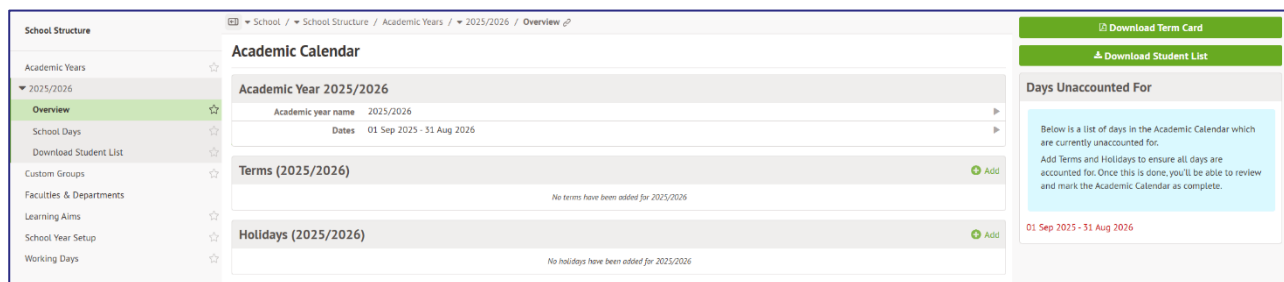
School Year Setup

Steps to prepare for the new academic year are locked until the Academic Calendar is [filled in and marked as complete](#).

2021/2022	
1. Academic Calendar	Incomplete

Please Note: For now, only the basic details (start date, end date, name) of the 2021/2022 academic year can be set. The rest of the school year setup (like setting up the academic calendar, holidays, student groups etc.) will be accessible from **01 May 2021**, 4 months prior to the beginning of 2021/2022 academic year.

1. Click the option for **1. Academic Calendar**.
2. Check the dates as **01/09/2025 – 31/08/2026**



Adding terms

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

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

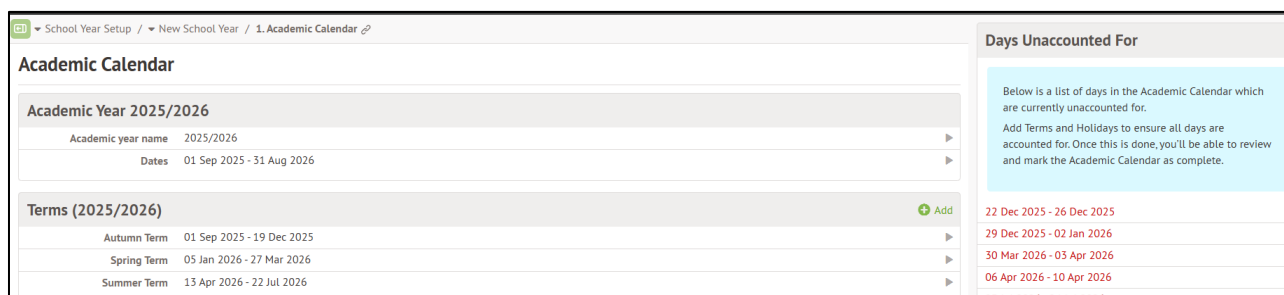
1. Click **+Add** to add a new term.
2. Completed the fields required




3. Click on **Add Term**

Repeat for all three terms. Once you have added all your term dates, the right hand side of the screen will highlight any gaps in data.

You can fill these gaps by adding in all your holidays (Half terms, Christmas and Easter break etc) in the **Holiday** section.



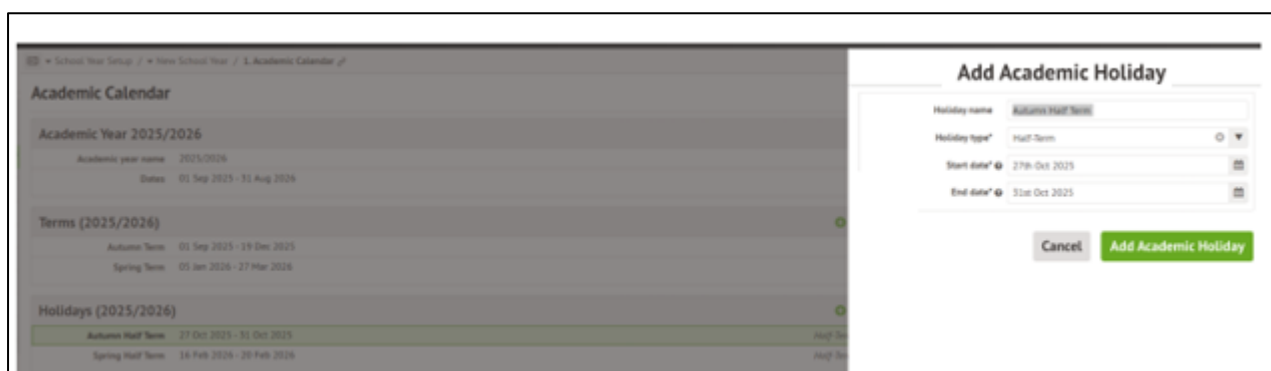
Adding Half Term, INSET days, Public Holidays and Non Term Dates

Ensure you include all of the holiday dates to ensure there are no attendance registers created on these dates. You do not have to include weekends.

Half Term Holidays

Holiday Name	Holiday Type	Start Date	End Date
Autumn Half Term	Half Term	27/10/2025	31/10/2025
Spring Half Term	Half Term	16/02/2026	20/02/2026
Summer Half Term	Half Term	25/05/2026	29/05/2026

1. Click **+Add** to add a new holiday.



2. Completed the fields required
3. Click on **Add Academic Holiday**

Repeat for all three Half Term holidays. Once completed, the right hand side of the screen will highlight any gaps in data.

INSET 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

Holiday Name	Holiday Type	Date
INSET	INSET	03/09/2025
INSET	INSET	Defined by the School
INSET	INSET	Defined by the School
INSET	INSET	Defined by the School
INSET	INSET	Defined by the School



1. Click **+Add** to add a new holiday.
2. Completed the fields required
3. Click on **Add Academic Holiday**

Holidays (2025/2026)

+ Add

No holidays have been added for 2025/2026

Academic Calendar

Academic Year 2025/2026

Academic year name 2025/2026

Dates 01 Sep 2025 - 31 Aug 2026

Terms (2025/2026)

Autumn Term 01 Sep 2025 - 19 Dec 2025

Spring Term 05 Jan 2026 - 27 Mar 2026

Holidays (2025/2026)

Autumn Half Term 27 Oct 2025 - 31 Oct 2025 Half-Term

Spring Half Term 16 Feb 2026 - 20 Feb 2026 Half-Term

Add Academic Holiday

Holiday name

Holiday type*

Start date*

End date*

4. **Repeat for all the INSET DAYS.** Once completed, the right hand side of the screen will highlight any gaps in data.

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 a holiday type of Vacation

Holiday Name	Holiday Type	Date
Non Term Date	Vacation	Start date: 01/09/2025 End Date: 02/09/2025
May Day Holiday	Public Holiday	04/05/2026

1. Click **+Add** to add a new holiday.
2. Completed the fields required
3. Click on **Add Academic Holiday**

Holidays (2025/2026)

+ Add

No holidays have been added for 2025/2026

Academic Calendar

Academic Year 2025/2026

Academic year name 2025/2026

Dates 01 Sep 2025 - 31 Aug 2026

Terms (2025/2026)

Autumn Term 01 Sep 2025 - 19 Dec 2025

Spring Term 05 Jan 2026 - 27 Mar 2026

Holidays (2025/2026)

Autumn Half Term 27 Oct 2025 - 31 Oct 2025 Half-Term

Spring Half Term 16 Feb 2026 - 20 Feb 2026 Half-Term

Add Academic Holiday

Holiday name

Holiday type*

Start date*

End date*

- Repeat for all the Public / Bank Holidays. Once completed, the right hand side of the screen will highlight any gaps in data.

Mark as complete

Once all relevant holidays, training days etc have been entered and there are no gaps in the dates, and all dates have been accounted for.

Don't worry if you haven't yet added in your inset days - you can return to this step at a later date once you know when these will be.

Click **Mark Academic Calendar as Complete**.

Once the Academic Calendar is complete, other steps will be made available.

To make any further changes to the academic calendar you must click the red Return to incomplete button, then make your edits.

You must click the **Mark calendar as Complete** button again to save your changes and enable you to continue editing the next sections.

Chapter 2 Admissions for September 2025

Introduction

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

If you've already been using Arbor to manage your applicants for September's cohort, and already created the 25/26 Academic Year, make sure it's marked as Complete and you can skip to Chapter 3 Off Roll Leavers



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

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1099677/Working_together_to_improve_school_attendance.pdf

Important Note: Please always refer to the DfE guidance regarding the admission and removal of students from the Registers.

DfE Expected First Day of Attendance Notes

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 parent, 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.

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 student, 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.

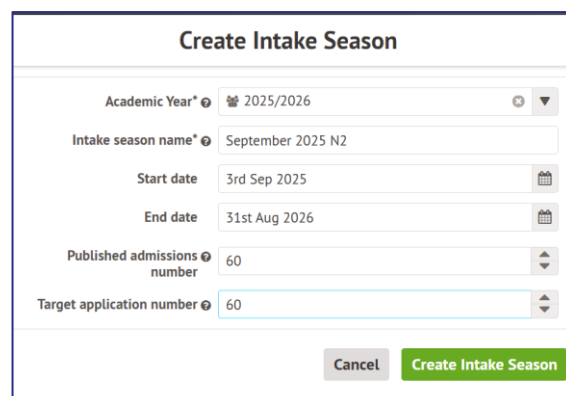
Adding the new intake season

You need to make sure that you have an Intake Season for the next academic year created before adding any applicants.

1. Go to **Students / All Students / Applicants** to get to the Applicants Dashboard. The **Applicants Dashboard** will show all of the Intake Seasons created on the MIS.



- Click on the green **+Add** sign at the top of the dashboard.
- Fill in the details and then click on Create Intake Season to return to main page.
- Repeat for different Year Groups; i.e. Year N2 or Year N1



Create Intake Season

Academic Year* 2025/2026

Intake season name* September 2025 N2

Start date 3rd Sep 2025

End date 31st Aug 2026

Published admissions number 60

Target application number 60

Cancel Create Intake Season

Applicant buckets and intake groups

Once the Intake Season is set up you will see that two new sections have been created called 'Applicant Buckets' and 'Intake Groups'. **Both areas are completely optional.**

Once you set up an intake season, you'll see two sections where you can add Applicant Buckets or Intake Groups.

- Applicant Buckets** - These can be used to help you manage the type of application as it comes in e.g, the local parish, siblings, etc. It will help you to sort students for the applications admission criteria.
- Intake Groups** - These can be used for creating multiple intakes within the same year group.

Adding, editing, and deleting

Adding an applicant bucket

- Click **+Add** in the applicant bucket section.
- Name your bucket, then click **Save Changes**.



Target application number

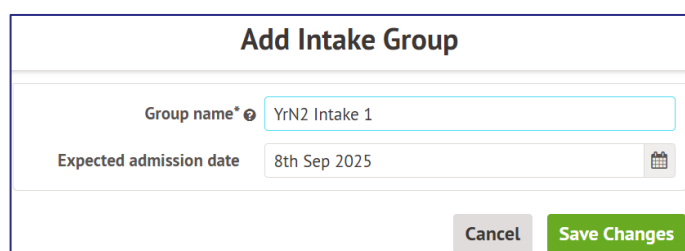
Add Applicant Bucket

Bucket name* Bucket 2

Cancel Save Changes

Adding an intake group

- Click **+Add** in the intake groups section.
- Name your bucket and add an expected admission date for this group (if you're grouping students in this way).
- Click **Save Changes**.

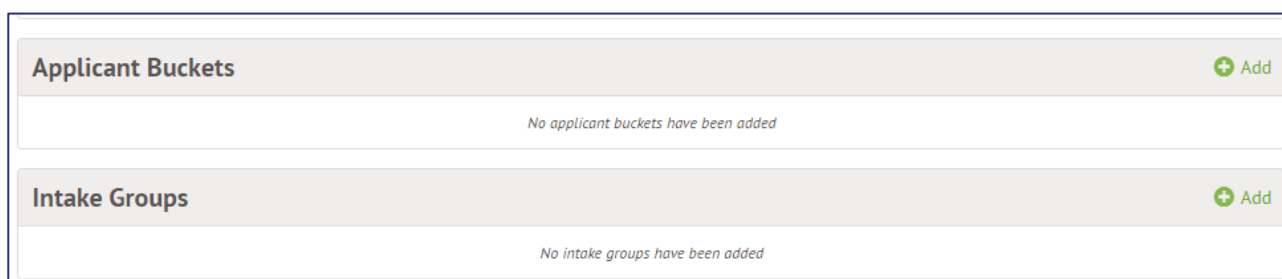


Add Intake Group

Group name* YrN2 Intake 1

Expected admission date 8th Sep 2025

Cancel Save Changes



Applicant Buckets + Add

No applicant buckets have been added

Intake Groups + Add

No intake groups have been added

In the below example, Students are starting on two different dates, so we have set up two groups.

Intake Groups + Add		
2024 Reception A	Expected admission date: 04 Sep 2024	0 applications ▶
2024 Reception B	Expected admission date: 09 Sep 2024	0 applications ▶

Editing or deleting

1. Click on the bucket or group to edit the name or delete it. You can also change the expected date for intake groups.

Adding Applicants

Three Options:

1. Importing an ATF
2. Manually Adding Applicants
3. Importing from a Spreadsheet

Option 1 - Uploading an ATF (Applicant Transfer File)

An Applicant Transfer File (ATF) is a standard format for sending student data to schools, often used when a student begins at a new school.

1. **School / Data / Import / ATF Import.**
2. Click on the **+Add** in the top right-hand corner.

ATF Import Jobs + Add	
No import jobs	

3. In the slide over, click **Browse** to select the ATF file from your computer
4. Click on the green **Upload ATF** button.

When you click Upload ATF, You will then be taken to the **Import Overview** (Shown in the section below).

Once you import your file you'll see the names have a red x, meaning that the applicants have not yet been fully imported.

Import ATF

Information

This page lets you upload an ATF file to import students into the system. Please note that this uploader will only accept ATF files.

ATF file (.xml)*  C:\fakepath\204LLLL_ATF_2042003_16C Browse...

Cancel Upload ATF

Students	
Lane Ebube (CREATE NEW STUDENT)	✗
Mann Theodore (CREATE NEW STUDENT)	✗
Smith Martha (CREATE NEW STUDENT)	✗
Smitt Baxter (CREATE NEW STUDENT)	✗

If you click on a student, you can specify an intake season if this will be different to the rest of the other students.

You can also map them to an applicant if they already exist in the intake season. **You won't be able to map the import to an existing student, for example if you are adding a Reception intake and one of the students already attends your Nursery.**

If both the original student and the importing student have the same UPN, they will be automatically matched.

« Back
Import Applicant

We can't match this student because there isn't an existing student on Arbor with the same UPN. You can manually select a student to match this record to using the 'Update student' field below. Please only use this field if you know for certain that this information should update this student record, as it can't be undone. If you leave the 'Update student' field empty, the import will create a new student.

Import Details

ATF student Amy Davis (No UPN provided) 29 Mar 2021
Application reference 823-2013-10-K-000061
Intake season* September Nursery N2
Update student Leave empty to import as new student

Cancel Import applicant

Finish the import

To import the students in bulk, click the **Import All Students** orange button.

ATF Import Overview

Import date 12 May 2024 16:32
From Not applicable
To 845/2001

Students

Gaughan Aiden (CREATE NEW STUDENT) ✗

Download ATF

Import All Students

Select the intake season to import them into, then confirm the import.

You'll receive a notification in the top right of your screen to let you know when the import has been completed.

If you refresh your page, you'll see all the students have been imported and new applicants have been created.

These students will now appear in the **Applicants** section.

Import All Applicants

Information

Clicking 'Import All Applicants' will import all the applicants with the data contained in the ATF file and add them to the chosen intake season.

Intake season* September 2025

Cancel Import All Applicants

ATF Import Overview	
Import date	04 Jul 2024 12:34
From	Crawley LEA
To	204/2003
Status	All students have successfully been imported
Students	
Lane Ebube (imported to Lane Ebube)	✓
Mann Theodore (imported to Mann Theodore)	✓
Smith Martha (imported to Smith Martha)	✓
Smitt Baxter (imported to Smitt Baxter)	✓

Option 2 - Manually adding applicants

Students / All Students / Applicants

1. Click **+Add** in the top right-hand corner of the table.

A pop up will show

What would you like to do?

Add Item in: Autumn Reception 24 Applicants

☒ Create applicant for existing student

☐ Create applicant for new student

☐ Download applicants template

☐ Upload applicants

When clicking on **Create Application for New Student** a slide over will load, add the details

of the new applicant and click on **Save Changes**. You will also be asked to create **Guardian Details** for this new student so make sure you have this information to hand!

Option 3 - Uploading Applicants from spreadsheet.

Download a template from the **Applicant Uploads** on left:

Intake Seasons

Intake Seasons / Intake Season / Applicant Uploads

Applicant Uploads

Uploads

No Applicant uploads exist - click add to begin.

Add

Instructions

Before proceeding, all Applicant files should be based on the template file provided. You can download the template file from the "Download Template" button, below.

Download Template

Transfer Applicants to Intake Groups

After you have your applicants added to the Intake Season, they can be transferred to Intake Groups, if relevant

Students / All Students / Applicants

1. Click on the relevant Intake Season
2. Click on Applicants, on the left hand side
3. Select the pupils and click on Bulk Action
4. Click on **Assign applicants to intake group** and fill in the information

Bulk action

Hide column

Student

☒ Burns Darren

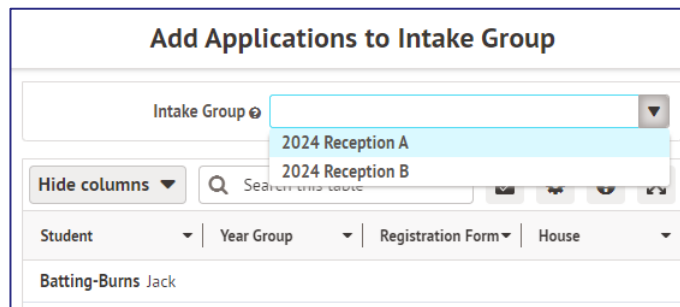
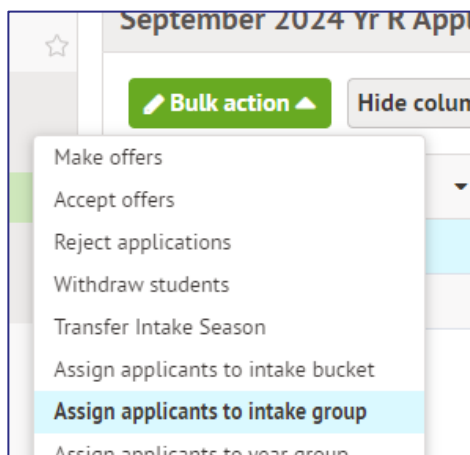
☐ Christopher Ella Mae

☒ Murphy Finley

☐ Radford Reagan

☒ Radford Reagan

You have selected 3 rows



Bulk action ▾ 6 columns hidden ▾				Search this table	Download ▾			
☐	Student ▾	Status ▾	#		Intake Group			
☐	Batting-Burns Jack	Newly created	68		2024 Reception A			
☐	Smith John	Newly created	67		2024 Reception B			

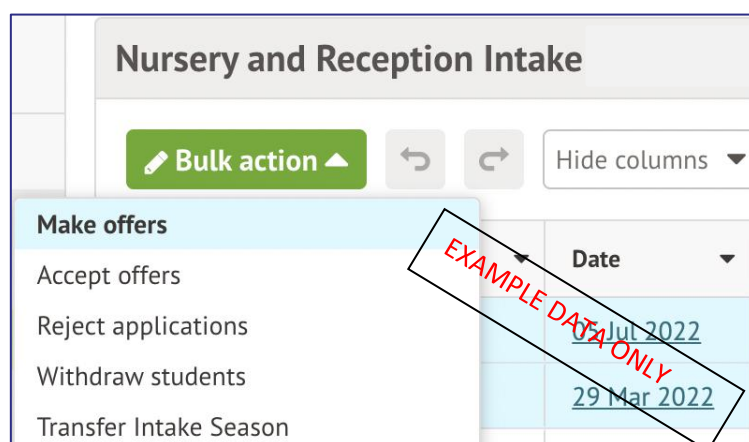
Log applicants as accepted, withdrawn or rejected

Once you have been given the finalised lists of students that have been accepted into your school for September, you can log that they have been accepted or rejected in Arbor.

Students / All Students / Applicants

1. Select the intake season,
2. Go to **Applicants** on the left-hand side. From here you can simply select the students to update
3. Click the **Bulk action** button to either **Make Offers, Make Accepted, Withdraw** or **Reject applications**.

Please note that only students that have not been enrolled yet can be rejected.



From the same area & providing you have contact details recorded against your applicants, you can send out communications.



Chapter 3 Leavers

Introduction

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

DfE Statutory Guidance Notes

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

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

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

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

Date of Leaving:

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

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

Do not make a date of leaving on the last day of the academic year ie. 31/08/2024.

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

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.buckscc.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.

Free School Meal Eligibility: No requirement to put an end date due to change in DfE eligibility criteria.

<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/>

School / School Structure / School Year Setup.

- Click on the second step **2. Off Roll Leavers** to unenroll the students who are leaving your school, in bulk,

2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Available
3. Year Groups and Registration Forms	Available
4. Custom Groups	Available
5. Houses	Locked
6. Registers	Locked
7. Meals	Locked
8. Interventions	Available
Review School Year Setup	

Leavers from earlier in the year

Before you get started, on this page you'll see in the Review section any students who have already left or have been given an end date within the current summer term, for example, if a student emigrated halfway through the year.

Leavers routine is optional in the steps in the School Year Setup and can be 'skipped' at this point, if you do not have the information available at the time of completing the set up

School Year Setup

- New School Year
- Overview
- 1. Academic Calendar
- 2. Off-Roll Leavers**
- 3. Year Groups and Registration Forms
- 4. Custom Groups
- 5. Houses
- 6. Registers
- 7. Meals
- 8. Interventions
- Review School Year Setup

Off-Roll Leavers

Off-Roll 2024/2025 Leavers

1. Off-Roll Leavers Click here to off-roll leavers. You can review already off-rolled leavers below.

Review 2024/2025 Leavers

This table shows students who left the school in the last term of 2024/2025.

Bulk action Hide columns Search this table Download

☐	Student	Year	Leaving Date	Reason	Destination
☐	Kershaw, Wesley		02 May 2025	In year transfer - Maintained sc -	Green Abbey School

Showing 1 result

Leaver Destinations

Green Abbey School (02 May 2025) 1 student Create CTF for these students

Instructions

Off-Roll Leavers setup steps are optional. Once you have reviewed Off-Roll Leavers, click Mark as complete to complete setup or click Skip for now to review later.

Mark as complete

Skip for now

Recording 'End Of Phase' Leavers in bulk

- Click the **Off-Roll Leavers** field.

Off-Roll Leavers

Off-Roll 2024/2025 Leavers

1. Off-Roll Leavers Click here to off-roll leavers. You can review already off-rolled leavers below.

In the slide over, choose which year group to off-Roll leavers from. This will usually be:

- Year 2 if you are an Infant School
 - Year 6 if you're a Primary School
2. Click the **year group** this will bring up a list of all students who have not already been marked as leavers.
 3. Keep ticked any students you want to be off-rolled with the same leaving date and leaving reason.

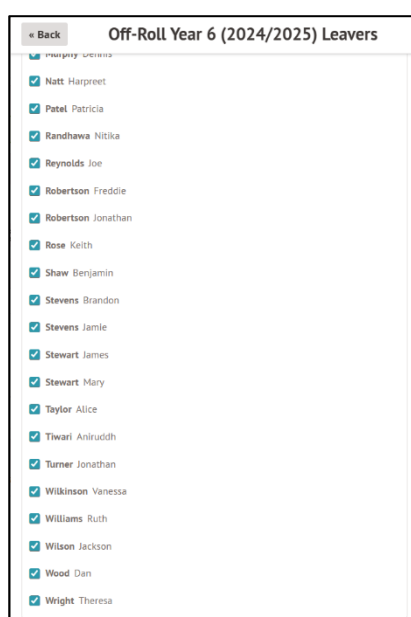


« Back **Off-Roll 2024/2025 Leavers**

2024/2025 Year Groups

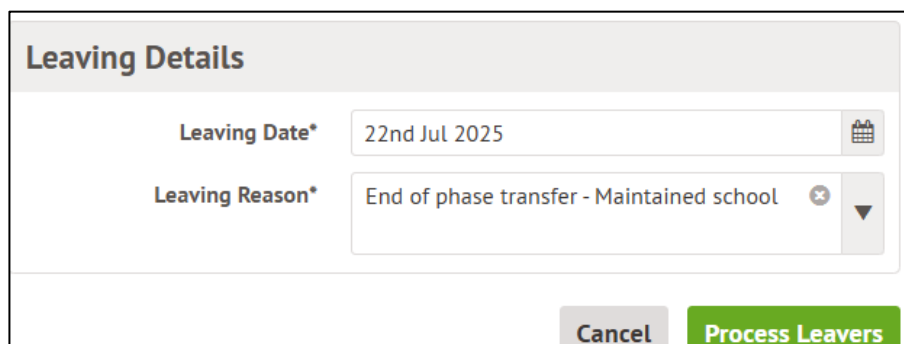
Please select the year group you wish to off-roll leavers for.

Nursery	▶
Reception	▶
Year 1	▶
Year 2	▶
Year 3	▶
Year 4	▶
Year 5	▶
Year 6	▶



« Back **Off-Roll Year 6 (2024/2025) Leavers**

- ☒ Natt Harpreet
- ☒ Patel Patricia
- ☒ Randhawa Nitika
- ☒ Reynolds Joe
- ☒ Robertson Freddie
- ☒ Robertson Jonathan
- ☒ Rose Keith
- ☒ Shaw Benjamin
- ☒ Stevens Brandon
- ☒ Stevens Jamie
- ☒ Stewart James
- ☒ Stewart Mary
- ☒ Taylor Alice
- ☒ Tiwari Aniruddh
- ☒ Turner Jonathan
- ☒ Wilkinson Vanessa
- ☒ Williams Ruth
- ☒ Wilson Jackson
- ☒ Wood Dan
- ☒ Wright Theresa



Leaving Details

Leaving Date* 22nd Jul 2025

Leaving Reason* End of phase transfer - Maintained school

Cancel **Process Leavers**

For Year 2 & Year 6, the Leaving Reason is 'End of Phase Transfer – Maintained School'

The leaving date should be a date when the pupil could have attended School ie. the last school day of the 2022/23 academic year eg.

21/07/2023. Do not make a date of leaving during a School holiday or a staff INSET day.

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

Pupils Leaving out of Phase

Pupils in **Year 1 to Year 5**, should have their **Reason for Leaving** as **"In Year Transfer – Maintained School"** (or other applicable reason). **Date of Leaving** should be the last day of the Summer Term 2025 or other applicable date.

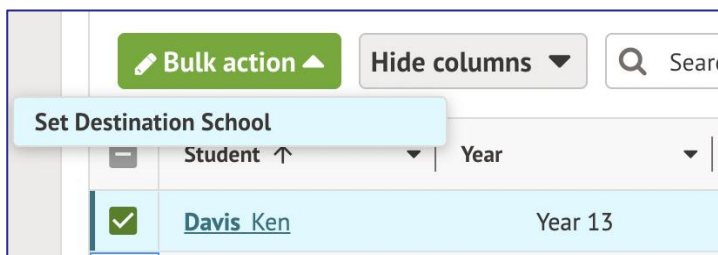
You can un-enrol these pupils in the same way. Just select the year group they are part of and untick every other student in that year group

IMPORTANT: 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**.

CME guidance on April 2022 states: all Buckinghamshire Schools are required to complete a **"removal from Roll Notification Form"** for any pupil who leaves at a **non-transition point**.

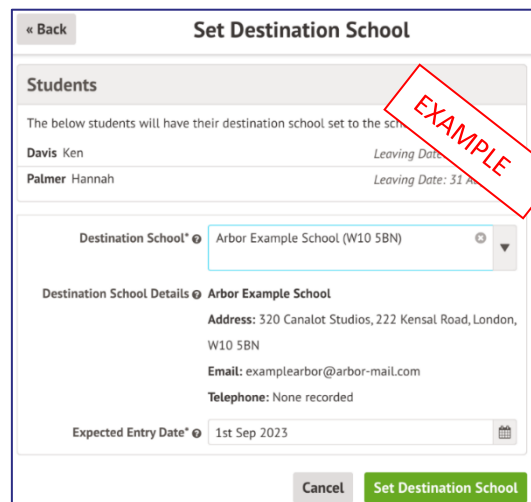
Adding destinations

1. Select pupil(s) and click the **Bulk action** button to select **Set destination School**.



The screenshot shows a table with columns for Student and Year. A row for 'Davis Ken' in 'Year 13' is selected. A 'Bulk action' button is visible, and a dropdown menu is open showing 'Set Destination School' as an option.

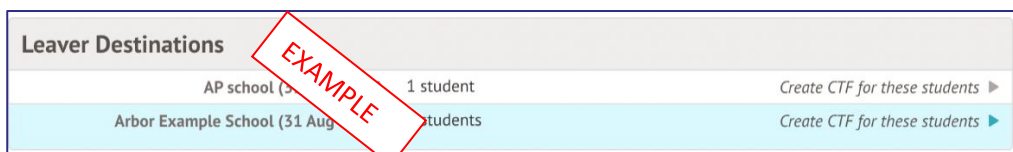
If you don't see the destination school? You will need to add it in the Linked Organisations.



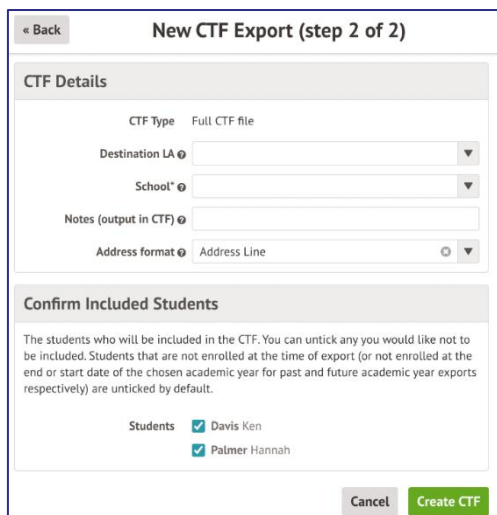
The screenshot shows the 'Set Destination School' form. It includes a 'Students' section with a list of students (Davis Ken, Palmer Hannah) and their leaving dates. Below this is a 'Destination School' dropdown menu set to 'Arbor Example School (W10 5BN)'. The 'Destination School Details' section shows the school's address, email, and telephone. The 'Expected Entry Date' is set to '1st Sep 2023'. A red 'EXAMPLE' stamp is overlaid on the form.

Generating CTFs for your leavers

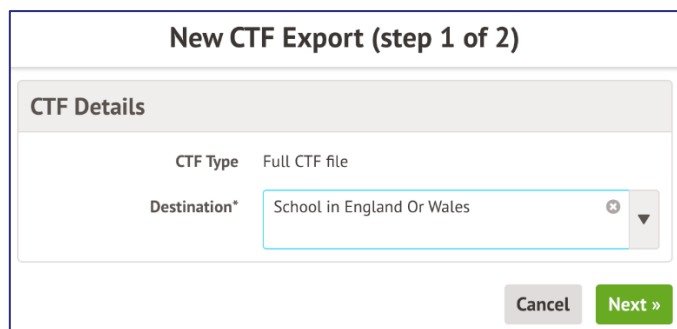
Once you've set destination schools, you can generate a CTF with your Leaver's information. Scroll down to the very bottom of the page.



The screenshot shows the 'Leaver Destinations' table. It has columns for destination school and the number of students. Two rows are visible: 'AP school (31 Aug)' with '1 student' and 'Arbor Example School (31 Aug)' with '2 students'. A red 'EXAMPLE' stamp is overlaid on the table.

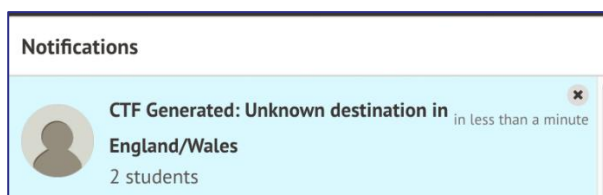


The screenshot shows the 'New CTF Export (step 2 of 2)' form. It includes a 'CTF Details' section with fields for 'CTF Type' (Full CTF file), 'Destination LA', 'School', 'Notes (output in CTF)', and 'Address format'. Below this is a 'Confirm Included Students' section with a list of students (Davis Ken, Palmer Hannah) and checkboxes to include or exclude them. A red 'EXAMPLE' stamp is overlaid on the form.



The screenshot shows the 'New CTF Export (step 1 of 2)' form. It includes a 'CTF Details' section with fields for 'CTF Type' (Full CTF file) and 'Destination' (School in England Or Wales). There are 'Cancel' and 'Next >' buttons at the bottom.

When the CTF is ready to download you'll get a notification in the top right of your Arbor site.



The screenshot shows a notification banner in the top right corner of the Arbor site. It says 'CTF Generated: Unknown destination in England/Wales' and '2 students'.

2. In the slide over, click the **Download** button.



The CTF will then download to your computer into your default downloads file. **Do not open the file.**

Mark as complete

When you are happy that this section is now complete,

1. Click the green **Mark as Complete** button.

If you wish to return to this step and make any changes, click the red **Return to incomplete** button.

« Back

Download CTF File

CTF Details	
Type	Full CTF
Sender	Local Authority: 0000
Destination	Unknown destination: /Wales (XXX/XXXX)
File name	2070000_CTF_XXXXXXX_...xml
Exported on	14 Feb 2023, 08:30
Exported by	Arbor Admin
Students	Ken Davis Hannah Palmer

Delete

Cancel

Download

Off-Roll Leavers

Off-Roll 2022/2023 Leavers

1. Off-Roll Leavers Click here to off-roll review already off-rolled leavers below.

Review 2022/2023 Leavers

This table shows students who left the school in the last term of 2022/2023.

Instructions

Off-Roll Leavers setup steps are optional. Once you have reviewed Off-Roll Leavers, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

⚡ Skip for now

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

Off-Roll Leavers

Off-Roll 2022/2023 Leavers

1. Off-Roll Leavers The leavers process is completed. You can review already off-rolled leavers below.

Review 2022/2023 Leavers

Instructions

Off-Roll Leavers setup was marked as complete on 14 Feb 2023, 08:39, click the button below to return Off-Roll Leavers to incomplete.

Return to incomplete

Amend Off-Roll Leavers

Returning Off-Roll Leavers to incomplete will **prevent any steps** that depend on this from being completed.

Are you sure you want to do this?

Cancel

Return to Incomplete

School Year Setup

2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete

Chapter 4 Year Groups & Registration Forms

Introduction

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year group and class into the correct year group in the new academic year.

Once you complete this step, Primary Guardians of your applicants will be able to log in to Parent Portal (if you have this module) to see and update details of their child once you send out their welcome email.

School / School Structure / School Year Setup

1. Click on step 3.

School Year Setup		
School Year Setup 2025/2026 1. Academic Calendar 2. Off-Roll Leavers 3. Year Groups and Registration Forms 4. Custom Groups 5. Houses 6. Registers 7. Meals 8. Interventions Review School Year Setup Complete Available Available Available Locked Locked Locked Available		

Copy year groups and registration forms

2. Click on 3a. Copy year groups and registration forms

Year Groups and Registration forms set up is optional and can be 'skipped' at this point, if you do not have the information available at the time of completing the set up

School Year Setup

New School Year

3. Year Groups and Registration Forms

Year Groups and Registration Forms

Setup 2025/2026

3a. Copy year groups and registration forms

3b. Assign tutors to year groups and registration forms

3c. Promote Year Group Students

3d. Enrol Applicants

3e. Review and tweak Year Group enrolments

3f. Promote Registration Form Students

3g. Review and tweak registration form enrolments

Review

Year Groups (2025/2026)

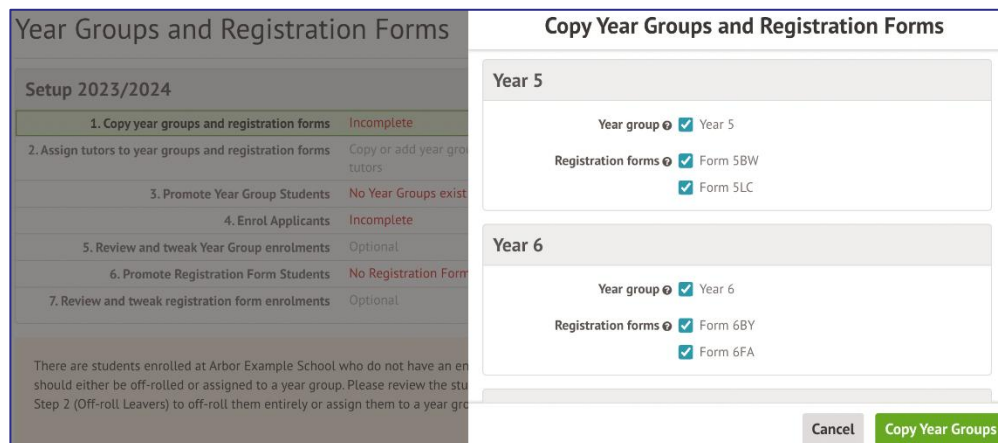
No Year Groups exist for 2025/2026

Registration Forms (2025/2026)

No Registration Forms exist for 2025/2026

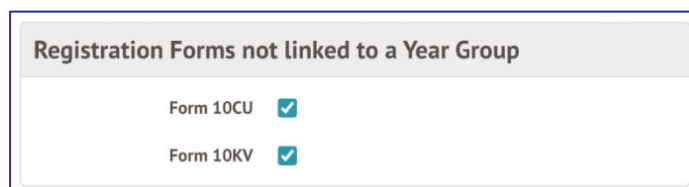
Don't worry if your registration forms will have different names next year. Just copy over the number of forms you will need, then change the names later.

3. Untick any year groups and registration forms you don't want to copy over,
4. Click **Copy Year Groups**.



If you untick a year group but leave a registration form for the year group ticked, the registration form will still be copied, but it will not be linked to a year group.

You can also choose whether to copy over registration forms not linked to a year group.

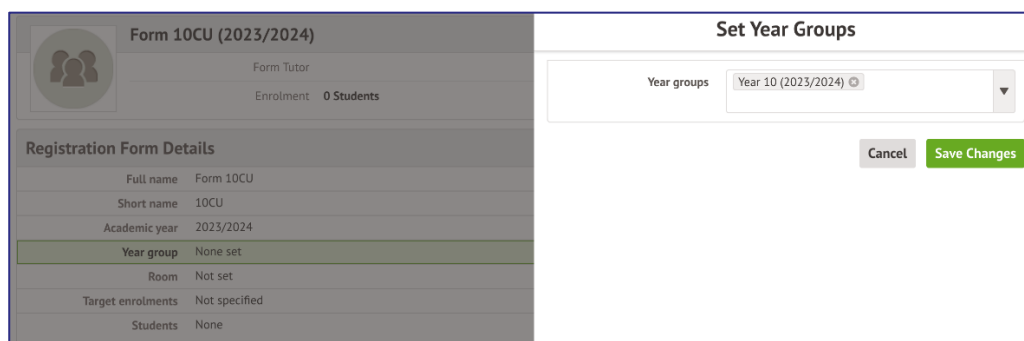


Editing registration forms

Click on a registration form to link to a year group.

You can also link multiple year groups to a registration form, for example, if you register all your nursery students together.

1. Click on Year Group
2. Add another year group, if required.



Adding more Year Groups or Registration forms

You can add additional Year Groups or Registration forms if needed by

1. Clicking +Add.

Year Groups (2025/2026)	+ Add
-------------------------	--------------------

Assign tutors to year groups and registration forms

Year Groups and Registration Forms	
Setup 2025/2026	
3a. Copy year groups and registration forms	Incomplete
3b. Assign tutors to year groups and registration forms	Copy or add year groups and registration forms to assign tutors
3c. Promote Year Group Students	No Year Groups exist for 2025/2026.
3d. Enrol Applicants	There are no applicants for the new school year
3e. Review and tweak Year Group enrolments	Optional
3f. Promote Registration Form Students	No Registration Forms exist for 2025/2026.
3g. Review and tweak registration form enrolments	Optional

- Click **3b. Assign Tutors** field to choose the staff members you would like to assign as heads of year and registration forms. Arbor will pre-fill these fields based on your setup this year.
 - You can amend them if you wish by clicking the X button next to a name and adding a new name from the list (if you already have a staff profile set up for them).
 - When you have chosen your tutors, click the green **Assign Tutors** button.

If you know there will be staffing changes but don't know who will be teaching each class, you can assign the staff you know will be registration tutors and leave the forms with no tutor yet confirmed blank. You'll need to assign the tutors from the class page when you do know.

Year Groups and Registration Forms	Assign Tutors
Setup 2023/2024	Year 5 (2023/2024)
1. Copy year groups and registration forms	Heads of Year: Candice Morgan
2. Assign tutors to year groups and registration forms	Form 6BW (2023/2024) tutors: Lisa Graham
3. Promote Year Group Students	Form 5LC (2023/2024) tutors: Leonie Chapman
4. Enrol Applicants	
5. Review and tweak Year Group enrolments	
6. Promote Registration Form Students	
7. Review and tweak registration form enrolments	
Year 6 (2023/2024)	
Heads of Year:	
Form 6BY (2023/2024) tutors: Lisa Wilson	
Cancel Assign Tutors	

If you've left a registration form with no tutor, you'll see a message telling you that some year groups and forms do not have tutors assigned.

Make a note that this will need to be entered when you do have the information.

2. Assign tutors to year groups and registration forms	7 out of 17 year group tutors assigned, 11 out of 30 registration form tutors assigned
--	--

Add or edit form tutors

1. Click on a registration form to change or add teachers as Form Tutors, or to link to a year group.

Please note: If you want to change teachers after you've already completed Step 6 of New School Year Setup, you'll need to also add the tutor to the registers using these instructions:

Registration Forms (2023/2024)			+ Add
Form 1MJ	Tutors: None assigned	0 students	▶
Form 1TP	Tutors: None assigned	0 students	▶
Form 2QH	Tutors: None assigned	0 students	▶

Add or edit a head of year

1. Click on a year group to add a Head of Year.

Year Groups (2023/2024)			+ Add
N1	Heads of Year: None assigned	0 students	▶
N2	Heads of Year: None assigned	0 students	▶

Registration Forms
Nursery (2023/2024)

Automatic Enrolments into Courses
No automatic enrolments

Heads of Year
No heads of year assigned

[« Back](#)

Add Head of Year

Staff member*

From* 1st Sep 2023

Until* 31st Aug 2024

[Cancel](#) [Add Tutor](#)

Promote year group students

1. Click on **3c. Promote Year group Students**.

Year Groups and Registration Forms		
Setup 2025/2026		
3a. Copy year groups and registration forms	Incomplete	▶
3b. Assign tutors to year groups and registration forms	Copy or add year groups and registration forms to assign tutors	
3c. Promote Year Group Students	No Year Groups exist for 2025/2026.	
3d. Enrol Applicants	There are no applicants for the new school year	▶
3e. Review and tweak Year Group enrolments	Optional	▶
3f. Promote Registration Form Students	No Registration Forms exist for 2025/2026.	
3g. Review and tweak registration form enrolments	Optional	▶

2. Choose which year groups to promote students into.

If only some students are moving up (such as for nursery), promote the whole year. You can then move the students who are remaining in nursery back in the 'tweak' step later.

- If you are splitting classes, promote the whole year. You can then move the students who will be in a different class in the 'tweak' step later.
- You can also see that your highest year group is not automatically promoted. You can leave that field blank, then click **Promote**.

Year Groups and Registration Forms

Setup 2023/2024

1. Copy year groups and registration forms	17 out of 17 year group forms copied
2. Assign tutors to year groups and registration forms	7 out of 17 year group registration form tutors assigned
3. Promote Year Group Students	0 out of 17 promoted
4. Enrol Applicants	Incomplete
5. Review and tweak Year Group enrolments	Optional
6. Promote Registration Form Students	0 out of 34 promoted
7. Review and tweak registration form enrolments	Optional

Promote Year Group Students

Year 11 (2022/2023)	Year 11 (2023/2024)	✕ ▼
Year 12 (2022/2023)	Year 12 (2023/2024)	✕ ▼
Year 13 (2022/2023)	Year 13 (2023/2024)	✕ ▼
Year 14 (2022/2023)	Promote to...	▼

Cancel
Promote

When promoting your year groups in Arbor, you will always be at least one short.

3. Promote Year Group Students 16 out of 17 promoted

Enrol Applicants

Year Groups and Registration Forms

Setup 2025/2026

3a. Copy year groups and registration forms	Incomplete	▶
3b. Assign tutors to year groups and registration forms	Copy or add year groups and registration forms to assign tutors	
3c. Promote Year Group Students	No Year Groups exist for 2025/2026.	
3d. Enrol Applicants	There are no applicants for the new school year	▶
3e. Review and tweak Year Group enrolments	Optional	▶
3f. Promote Registration Form Students	No Registration Forms exist for 2025/2026.	
3g. Review and tweak registration form enrolments	Optional	▶

In this step, you'll be able to enrol your Applicants into Registration Forms and year groups, as you've now set them up.

1. Click on 3d Enrol Applicants

If you haven't yet added your applicants to Arbor and finished processing them, you won't be able to enrol them yet. When you click the **3d. Enrol Applicants** option, you'll see the below message.

Year Groups and Registration Forms

Setup 2023/2024

1. Copy year groups and registration forms	17 out of 17 year groups copied, 30 out of 30 registration forms copied
2. Assign tutors to year groups and registration forms	7 out of 17 year group tutors assigned, 13 assigned
3. Promote Year Group Students	16 out of 17 promoted
4. Enrol Applicants	Incomplete

Enrol Applicants

You have 1 unprocessed application for which the applicants cannot yet be enrolled. To manage your applications please click 'Manage Applications' below. Note! Enrol applicants setup as part of School Year Setup will remain with a red 'Incomplete' status, until all unprocessed applications have been dealt with.

Cancel
Manage Applications »

2. Click the **Manage Applicants** button

3. Click on the intake season.

Intake Seasons (2023/2024)

+ Add

Sept 23	01 Sep 2023 - 31 Aug 2024	Academic Year 2023/2024 ▶
---------	---------------------------	---------------------------

Make sure all the students you want to enrol have the Status of **Offer Accepted**.

☐	Student	Date	Status
☐	Wright Charlie	09 Feb 2023	Offer acce...

3. Tick the students who have accepted their offers.
4. Click the **Bulk action** button to assign them to a year group.
5. Repeat, and assign them to a registration form.

When you assign applicants to a registration form, this will automatically also assign them to a year group, and potentially override a year group already input. If the registration form is linked to multiple year groups, it will choose the one that was set up first.

We recommend checking that students have been assigned to the right year group before enrolling them. If they are not, you can repeat the Assign applicants to year group option to re-add them to the right year group.

6. Finally click **Enrol students**. The students will then be enrolled in the Applicants section.

Enrol Applicants section should also now be marked as complete.

Year Groups and Registration Forms	
Set up year groups and registration forms	17 out of 17 year groups copied, 30 out of 34 registration forms copied
2. Assign tutors to year groups and registration forms	7 out of 17 year group tutors assigned, 11 out of 30 registration form tutors assigned
3. Promote Year Group Students	16 out of 17 promoted
4. Enrol Applicants	Complete

If any remaining applicants have accepted a place but haven't yet been enrolled, click the **3d. Enrol Applicants** option to enrol these applicants.

Please note that this will not automatically enrol them into a Year Group and Registration form. If you haven't done this for these students, you should first follow the instructions shown above.

Review and tweak year group enrolments

This is an optional step.

1. Click on **5. Review and tweak year group enrolments**.

The next step is to make any changes to the year group a student has been automatically promoted to if necessary. **It is an optional step.**

EXAMPLE

1. Copy year groups and registration forms	17 out of 17 year groups copied, 30 out of 34 registration forms copied	▶
2. Assign tutors to year groups and registration forms	7 out of 17 year group tutors assigned, 11 out of 30 registration form tutors assigned	▶
3. Promote Year Group Students	16 out of 17 promoted	▶
4. Enrol Applicants	Complete	
5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	0 out of 34 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

2. Click a student's name to edit the enrolment, or select multiple rows and use the **Bulk action** button to change the student's year group.

You can only edit a student's future enrolment from this page. If you need to change their current enrolment, use the Enrolment section on the Student Profile.

3. Click the **Back** button to return to the Year Group & Registration Forms.

Review Year Groups

Review Year Groups - 2023/2024

Please note that you can only edit these enrolments if they are future enrolments or if the student does not yet have an enrolment. To edit a student's current enrolment please use the individual student's enrolment page.

Bulk action **Hide columns**

Student	Year Group
Adams Adam	Year 7 (2023/2024)
Adams Jade	Year 7 (2023/2024)
Allen Callum	Year 7 (2023/2024)
Allen Graham	Year 4 (2023/2024)

Promote registration form students

The next step is to promote Registration Form students from this year's registration forms into their forms for next year. Don't worry if you at this point are not sure which students belong in which new registration forms - you can move students around later.

In the slide over, select which registration form students should be promoted to for next year.

- If you have any registration forms without a year group assigned, you'll need to add them before you complete this

Year Groups and Registration Forms

Setup 2023/2024

1. Copy year groups and registration forms 17 out of 17 year groups copied, 30 out of 34 registration forms copied

2. Assign tutors to year groups and registration forms 7 out of 17 year group tutors assigned, 11 out of 30 registration form tutors assigned

3. Promote Year Group Students 16 out of 17 promoted

4. Enrol Applicants Complete

5. Review and tweak Year Group enrolments Optional

6. Promote Registration Form Students 0 out of 34 promoted

7. Review and tweak registration form enrolments Optional

There are students enrolled at Arbor Example School who do not have an enrolment for (2023/2024) rolled or assigned to a year group. Please review the students below and either go back to Step 2 entirely or assign them to a year group, as appropriate.

Review

Students without an Enrolment for 2023/2024

Promote Registration Form Students

Form 11VA (2022/2023)

Year 12 (2022/2023) to Year 13 (2023/2024)

Form 12XT (2022/2023)

Form 12ZN (2022/2023)

Registration Forms without Year Group

Form 10CU

Form 10KV

Registration Forms with multiple Year Groups

Nursery

EXAMPLE

Cancel Promote

Review and tweak registration form enrolments

This is an optional step. Click on **6. Review and tweak registration form enrolments**. The last step is to make any changes to the registration forms a student has been automatically promoted to if necessary. It is an optional step.

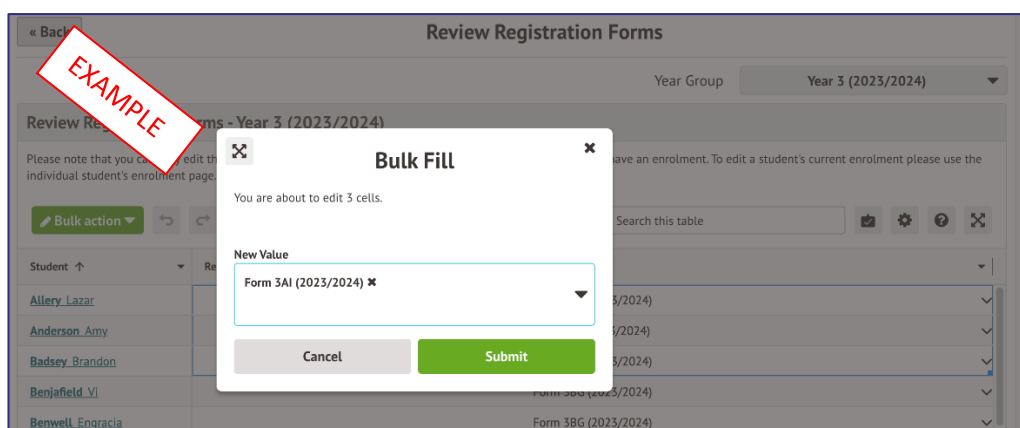
Year Groups and Registration Forms		
Setup 2023/2024		
1. Copy year groups and registration forms	17 out of 17 year groups copied, 30 out of 34 registration forms copied	▶
2. Assign tutors to year groups and registration forms	7 out of 17 year group tutors assigned, 11 out of 30 registration form tutors assigned	▶
3. Promote Year Group Students	16 out of 17 promoted	▶
4. Enrol Applicants	Complete	
5. Review and tweak Year Group enrolments	Optional	▶
6. Promote Registration Form Students	32 out of 34 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

1. Click on the cell and a page will load for the first year group in your school.
2. Select the year group you wish to make changes to by clicking on the top right-hand corner and selecting the year group from the drop-down.

You can either:

- Click on the cell containing the class information. A drop-down will appear offering the choices of classes for their year group. Select the class you wish to move them to.
- Select multiple rows and use the **Bulk action** button to change the student's registration form.

Please note: You can only move students to registration forms in the same year from here. To move a student to a reg form in a different year, they'll need to be added to the year group.



Resolving students without an enrolment

If you have any students who were not assigned a year group this academic year, they will not have been promoted to the next year group. Instead, these students will appear in the **Review** section.

There are students enrolled at Arbor Example School who do not have an enrolment for (2023/2024). These should either be off-rolled or assigned to a year group. Please review the students below and either go back to Step 2 (Off-roll Leavers) to off-roll them entirely or assign them to a year group, as appropriate.

Review

Students without an Enrolment for 2023/24

Hide columns Search this table Download

Student	Current Year Group	Current Registration Form
Allen Leah		
Carter Elliott		

Enrolling attending students

If they will be attending your school next year, you will need to add them to a year group and registration form.

1. Click the student's name to visit their profile and assign them to a year group and registration form.
2. Change the academic year to next year.
3. In the Enrolments section for this year, click **+Add** to add their enrolment into the required year group etc.

Academic Year 2023/2024 View All Sections

Arbor Example School Enrolments

Current Enrolment 01 Sep 2023 - 31 Aug 2024
Joined in: Year 2

2023/2024 Enrolments

Not enrolled

+Add
Add enrolment for student

Enrol Student in Academic Year

Academic year: 2023/2024

Student: Leah Allen

Enrolment mode: Single Registration

Attendance pattern: Only required for early years

Year group: Year 2 (2023/2024)

Registration form: Form 3BG (2023/2024)

House: Leave blank to choose House later

Notes:

Planned Learning Hours:

Planned EEP Hours:

Cancel Enrol Student

Removing students who will not be attending in the Pupil Profile

To off-roll leavers if they will not be attending your school next academic year, you will need to end their enrolment. Click the student's name to visit their profile.

1. Click their enrolment in your school.
2. Click the orange Unenrol button at the bottom of the slide over.
3. Fill in the fields required and Save.

Pupil is now unenrolled.

Jack Batting-Burns

Form: SED
Year: Year 2
House: Ashburn
Date of Birth: 08 Nov 2017 (7y 6m)
Mother: Sheryl Everett

SEN Support Disadvantaged Disadvantaged (EPR) FSM Pupil Premium Eligible Young Carer Free Medical Condition

Buckinghamshire Council Primary Enrolment

Current Enrolment: 01 Sep 2022 - ongoing
Joined in: Nursery school year (page 5-6)

2024/2025 Enrolments

Academic Year Enrolment	Year group	Registration form	House
2024/2025	Year 2	Form 3BG	Ashburn

2024/2025 Enrolment Modes

Enrolment mode: Single Registration

2024/2025 Courses

Course	Course Lead(s)	Enrolment D
Year 2	Sheryl Everett	14 Sep 2024
Year 2	Sheryl Everett	01 Sep 2024
Year 2, Term 2024	Jason Pate and Amy Mitchell	01 Sep 2024

Primary

Jack Batting-Burns

Form: SED
Year: Year 2
House: Ashburn
Date of Birth: 08 Nov 2017 (7y 6m)
Mother: Sheryl Everett

SEN Support Disadvantaged Disadvantaged (EPR) FSM Pupil Premium Eligible Young Carer Free Medical Condition

Enrolment Period

Date: 01 Sep 2022 - ongoing
Alternative Provision Reason: Not recorded

Academic Year Enrolments For Period

Academic Year	Enrolment Period
2022/2023	01 Sep 2022 - 31 Aug 2023
2023/2024	01 Sep 2023 - 31 Aug 2024
2024/2025	01 Sep 2024 - 31 Aug 2025

Unenrol Student



Make sure your students will be in the right year

Check that all your students have the correct year group for next year,

Students / Enrolment Pastoral / Year Groups

1. Change the academic year using the drop-down menu.
 - If you have not yet properly completed the setup for the next academic year, you will not see any year groups here. Complete the section above to promote your students into their year groups for next year.

Year Groups: 2025/2026

Academic Year: 2025/2026

Listing **Enrolments**

Year Groups for 2025/2026 + Add

No Year Groups for 2025/2026

- If you completed this step, you can check your enrolments are correct. You can click on the Enrolments tab to directly edit student enrolments.

Listing **Enrolments** EXAMPLE

Year Groups for 2024/2025 + Add

Nursery	Head of Year: Stacey Chapman	1 student ▶
Reception	Head of Year: Stacey Chapman	9 students ▶
Year 1	Head of Year: Lucas Johnson	6 students ▶
Year 2	Head of Year: Sheryl Everett	4 students ▶
Year 3	Head of Year: Elsie Robertson	58 students ▶
Year 4	Head of Year: Chris Allen	48 students ▶
Year 5	Head of Year: Teresa Gomm	51 students ▶
Year 6	Head of Year: Lizzie White	53 students ▶

2. Return to School Year Set up **School / School Structure / School Year Set Up**
3. Select **3. Year Group and Registration Forms**

Mark as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button.

Year Groups and Registration Forms

Setup 2023/2024

1. Copy year groups and registration forms	17 out of 17 year groups copied, 30 out of 34 registration forms copied	▶
2. Assign students to year groups and registration forms	7 out of 17 year group tutors assigned, 11 out of 50 registration form tutors assigned	▶
3. Promote Year Group Students	16 out of 17 promoted	▶
4. Enrol Applicants	Complete	▶
5. Review Year Group enrolments	Optional	▶
6. Promote Registration Form Students	32 out of 34 promoted	▶
7. Review and tweak registration form enrolments	Optional	▶

EXAMPLE

Instructions

Year Groups and Registration Forms setup steps are optional. Once you have reviewed Year Groups and Registration Forms, click Mark as complete to complete setup or click Skip for now to review later.

✔ Mark as complete

➡ Skip for now

School Year Setup

2023/2024

1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete

If you wish to return to this step and make any changes, click the red **Return to incomplete** button.

School Year Setup

2023/2024

1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete

Year Groups and Registration Forms

Setup 2024

1. Copy year groups and registration forms	17 out of 17 year groups copied, 30 out of 34 registration forms copied
2. Assign tutors and registration forms	7 out of 17 year group tutors assigned, 11 out of 30 registration form tutors assigned
3. Promote Year Group Students	Complete. 16 out of 17 promoted
4. Enrol Applicants	Optional

Instructions

Year Groups and Registration Forms setup was marked as complete on **15 Feb 2023, 15:54**, click the button below to return Year Groups and Registration Forms to incomplete.

Return to incomplete

Amend Year Groups and Registration Forms

Returning Year Groups and Registration Forms to incomplete will **prevent Houses, Registers, Meals** from being completed.

Are you sure you want to do this?

Cancel **Return to Incomplete**

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

Chapter 5 Custom Groups

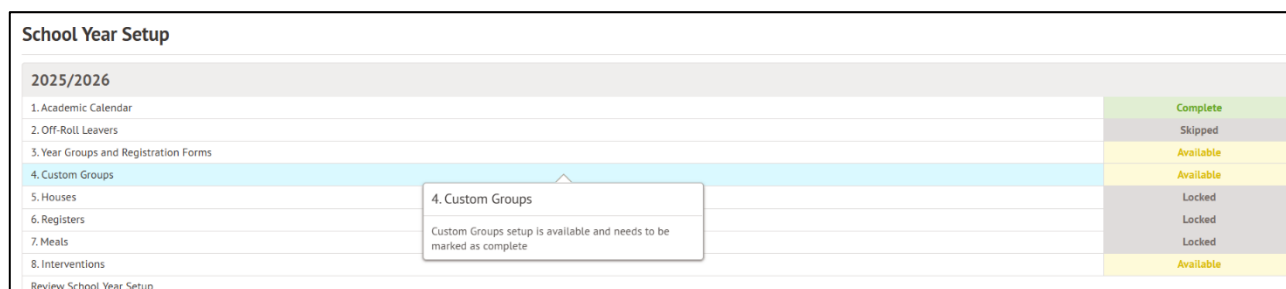
If the School does not use Custom Groups, this section can be 'Mark as Complete'

Please note that when selecting **Copy Group and Members**:

- Custom groups where students, staff or guardians have been added manually will have the people in the custom group copied over
- Where they've been added using **Automatic Membership Criteria**, the people will **not** be copied over, and you'll need to add the Automatic Membership Criteria again. This is because Automatic Membership Criteria are based on information for a specific academic year.

Copy custom groups from this year to next year

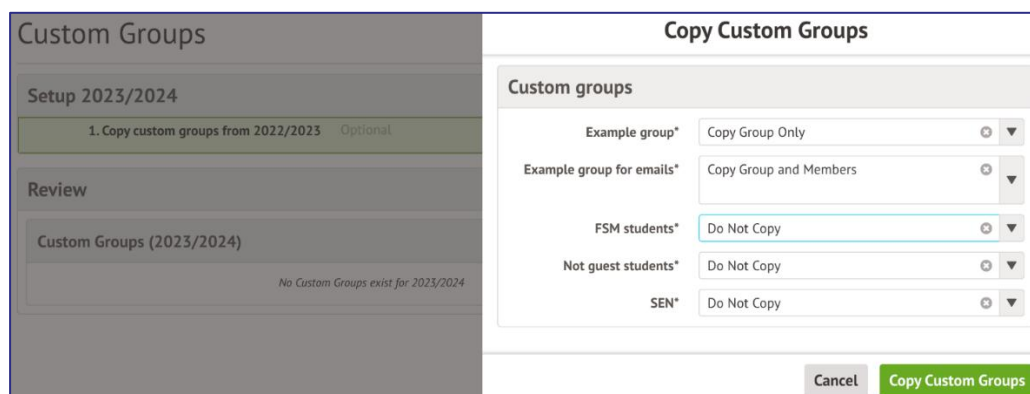
School / School Structure / School Year Setup



1. Select step **4. Custom Groups**.
2. Click **1. Copy Custom Groups from 2024/2025**



3. In the slide over, you can select which groups you would not like to copy over, which groups you would like to copy over with no student enrolments, and which groups you would like to copy over completely, including the students who are enrolled in the group.



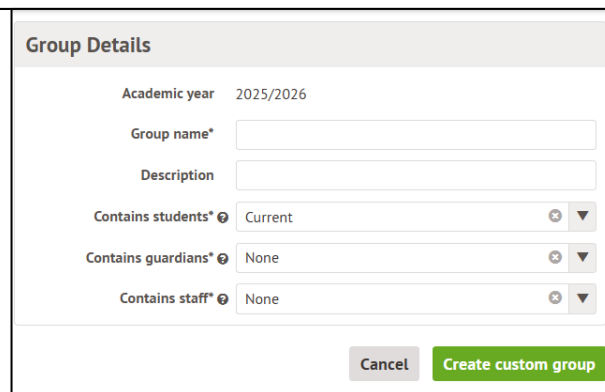
Add new custom groups

You can also set up entirely new custom groups as needed

1. Clicking **+Add** in the **Review** section.



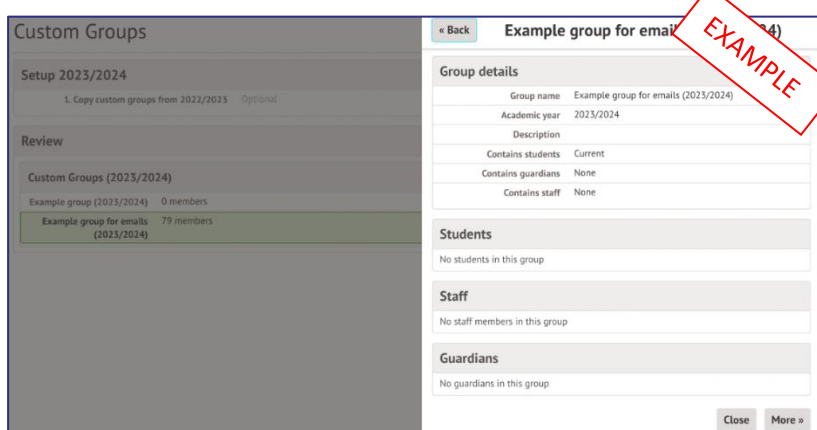
2. Add details and click **Create Custom Group**



Editing the custom groups

1. Click into a custom group, then click **More**. You can also delete a group you've set up incorrectly from here.

As your current students aren't members of the custom groups yet, it'll show as nobody being in this group in the slide over.






Mark as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button.

Custom Groups

Setup

1. Copy custom groups from 2022/2023 Optional

Review

Custom Groups (2023/2024)		+ Add
Example group (2023/2024)	0 members	2023/2024 ▶
Example group for emails (2023/2024)	79 members	2023/2024 ▶

Instructions

Custom Groups setup steps are optional. Once you have reviewed Custom Groups, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

➡ Skip for now

School Year Setup

2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete

If you wish to return to this step and make any changes, click the red **Return to incomplete** button.

Custom Groups

Setup 2023/2024

1. Copy custom groups from 2022/2023 Optional

Review

Instructions

Custom Groups setup was marked as complete on **15 Feb 2023, 16:23**, click the button below to return Custom Groups to incomplete.

Return to incomplete

Amend Custom Groups

Returning Custom Groups to incomplete will **prevent Registers** from being completed.

Are you sure you want to do this?

Cancel

Return to Incomplete

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

Chapter 6 Houses

If the School does not use Houses, this section can be 'Mark as Complete'

Houses and Applicants

You may want to create your houses for the next academic year before you enrol your applicants, to allow you to assign them to the relevant groups quicker.

Copy houses from this year to next year

School / School Structure / School Year Setup

1. Select step **5. Houses**.



2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Available
6. Registers	Available
7. Meals	Available
8. Interventions	Available
Review School Year Setup	



Houses

Setup 2023/2024

1. Copy houses and house enrolments 0 out of 4 houses copied

Review

Houses (2023/2024) +Add

Instructions: Houses setup steps are optional. Once you have reviewed Houses, click Mark as complete to complete setup or click Skip for now to review later.

Mark as complete Skip for now

2. Click on **1. Copy Houses and enrolments** to copy them.
3. In the slide over, select which houses you would like to copy over. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year. Current house tutors will remain assigned.



Houses

Setup 2023/2024

1. Copy houses and house enrolments 0 out of 4 houses copied

Review

Houses (2023/2024)

No Houses exist for 2023/2024

Copy Houses and House Enrolments

Below is a list of all houses in the current academic year. Tick the ones you would like to copy to the next academic year and untick the ones that should not be copied. Students who are enrolled in a house for the current academic year will be enrolled in the same house in the next academic year as part of copying the houses. Current house tutors will also be set as tutors of the new house.

Houses (2022/2023)

Acklam ☒ Copy House and Members

Colville ☒ Copy House and Members

Ladbrooke ☒ Copy House and Members

Westbourne ☒ Copy House and Members

Cancel Copy

Add new houses

You can also set up entirely new houses as needed by clicking **+Add** in the **Review** section.

Review

Houses (2023/2024)

+

Add

1

Add Houses

Acklam

Tutor: Stephanie Reynolds

Create House - 2023/24

Academic Year

2023/2024

House Name*

E.g. 'Seckford'

Short Name

E.g. 'SECK'

Cancel

Save Changes

Editing the houses

To edit the student enrolments in the House, or change the staff assigned, click into a House.

Houses (2023/2024)			+ Add
Acklam	Tutor: Stephanie Reynolds	154 students	▶
Colville	Tutors: None assigned	134 students	▶
Ladbroke	Tutors: None assigned	121 students	▶
Westbourne	Tutors: None assigned	127 students	▶

Mark as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button.

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

Houses

Setup 2023/24

1. Copy houses

4 out of 4 houses copied

Review

Houses (2023/2024)

+

Add

Acklam

Tutor: Stephanie Reynolds

154 students ▶

Colville

Tutors: None assigned

134 students ▶

Ladbroke

Tutors: None assigned

121 students ▶

Westbourne

Tutors: None assigned

127 students ▶

Instructions

Houses setup steps are optional. Once you have reviewed Houses, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

⚡ Skip for now

If you wish to return to this step and make any changes, click the red **Return to incomplete** button, or click **Make further changes to Houses**.

School Year Setup		
2023/2024		
1. Academic Calendar		Complete
2. Off-Roll Leavers		Complete
3. Year Groups and Registration Forms		Complete
4. Custom Groups		Complete
5. Houses		Complete

33



Houses

Setup 2023/2024

1. Copy houses and house enrolments 4 out of 4 houses copied

Review

Houses (2023/2024)		
Acklam	Tutor: Stephanie Reynolds	154 students
Colville	Tutors: None assigned	134 students
Ladbroke	Tutors: None assigned	121 students
Westbourne	Tutors: None assigned	127 students

Make further changes to Houses

Instructions

Houses setup was marked as complete on **17 Feb 2023, 12:21** , click the button below to return Houses to incomplete.

Return to incomplete

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

Amend Houses

Returning Houses to incomplete will **prevent any steps** that depend on this from being completed.

Are you sure you want to do this?

Cancel **Return to Incomplete**

Chapter 7 Registers

There are two ways of making sure students appear in the right registers only - **using enrolments or using Attendance Patterns.**

Registers for Primary Schools

Nursery registration sessions

If you have nursery children at your school, you will need to schedule registers for them first. Because your students may not be attending full time, you will need to schedule registration forms and enrol your nursery students into them differently, depending on whether they attend during the same times every day or not.

You must follow the instructions in our Scheduling your Nursery registers guide before following the instructions in **Appendix A.**

Scheduling your registration sessions

School / School Structure / School Year Setup

1. Select step **6 Registers.**

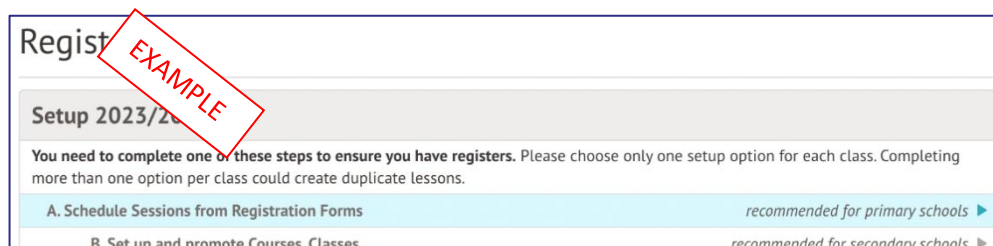
Ensure you have created all the registration forms you need to in **step 3** - these will be the student groups you'll be creating registers for.



2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Available
7. Meals	Available
8. Interventions	Available
Review School Year Setup	

6. Registers
Registers setup is available and needs to be marked as complete

We recommend selecting option **A. Schedule Sessions from Registration Forms.**



Register Setup 2023/24

You need to complete one of these steps to ensure you have registers. Please choose only one setup option for each class. Completing more than one option per class could create duplicate lessons.

A. Schedule Sessions from Registration Forms *recommended for primary schools*

B. Set up and promote Courses, Classes *recommended for secondary schools*

This will result in a of all the registration forms you have.

2. Select the registration forms,
3. Click the **Bulk action** button to select **Schedule Registration Forms.**

A slide over will appear where you enter the start and end times for the Registration Forms you have selected.

Review Registers (2023/2024) + Add

— Year 1	
Form 1MJ	
Form 1TP	
— Year 2	
Form 2QH	
Form 2VG	

☒	Form 1TP (2023/2024)	Year 1 (2023/2024)	Not Timetabled
☒	Form 2QH (2023/2024)	Year 2 (2023/2024)	Not Timetabled

4. Enter the start and end times, making sure your Morning end time falls at the beginning of lunchtime (to prevent errors during Census), and your Afternoon end time is the end of the school day. Leave a gap for lunch.

5. Click on **Schedule Registration Forms**

You can see that they've been timetabled. You can click into these to view more information.

When you return to step 6 (by clicking **Setup** in the left-hand menu), you will now see a list of all the scheduled Registration Forms.

You can then click the green Mark as complete button if you don't want to schedule any more classes to let the system know that you've completed this step.

« Back **Schedule Registration Forms**

Morning start time: 08:00

Morning end time: 12:00

Afternoon start time: 13:00

Afternoon end time: 16:00

Registration Forms to be scheduled

Form 1MJ (2023/2024)
Form 1TP (2023/2024)
Form 2QH (2023/2024)
Form 2VG (2023/2024)

Cancel Schedule Registration Forms

Registration Forms in 2

Bulk action Hide columns Search this table

☐	Registration Form	Year Group(s)	Status
☐	Form 2QH (2023/2024)	Year 2 (2023/2024)	Already Timetabled
☐	Form 2VG (2023/2024)	Year 2 (2023/2024)	Already Timetabled
☐	Form 3AI (2023/2024)	Year 3 (2023/2024)	Not Timetabled
☐	Form 3BG (2023/2024)	Year 3 (2023/2024)	Not Timetabled

Scheduling reception classes

If you have a **Reception** Year Group you will also need to choose if you will be using regular attendance patterns for your Reception students or not.

Using attendance patterns means that your students attend between the same times every day, for example, if your students attend Mon-Fri mornings only.

We recommend selecting 'no', as it is easier to make adjustments if necessary. If you select 'no':

- They will be set up like other year groups.
- All the lessons for the whole week will be scheduled directly against the top-level course for the reception class, without creating all the AM/PM bottom-level courses.
- Students will be automatically enrolled in sessions based on their enrolments into Registration Form groups.

Setup reception course modules, attendance patterns and ...

Some Registration form(s) selected are Reception classes. Please choose below if would like to set up separate course modules per day for these classes.

- Select yes to create separate classes per session if your school is using attendance patterns for pupils who will only be attending part time in reception.
- Select no if Reception pupils attend all sessions, or you plan to manage part-time/phased attendance students using the "X" attendance code.

Create separate modules per day for reception classes?*

No, we will not be using attendance patterns

The setup will look something like this:

Classes & Lessons	+ Add
Monday: 08:00 - 12:00 Effective Dates: 01 Sep 2023 - 31 Aug 2024 Staff: Maureen Jacobs	Scheduled ▶
Monday: 13:00 - 16:00 Effective Dates: 01 Sep 2023 - 31 Aug 2024 Staff: Maureen Jacobs	Scheduled ▶
Tuesday: 08:00 - 12:00 Effective Dates: 01 Sep 2023 - 31 Aug 2024 Staff: Maureen Jacobs	Scheduled ▶
Tuesday: 13:00 - 16:00 Effective Dates: 01 Sep 2023 - 31 Aug 2024 Staff: Maureen Jacobs	Scheduled ▶

If you select 'yes':

They will be set up in the same way as Nursery registration sessions.

Separate modules for each AM and PM session, for every day of the week, will be created and the lessons will be scheduled against those modules automatically.

Each session will become a bottom-level course with one class time within it.

You will need to make sure that you have set attendance patterns for your reception students for them to be automatically enrolled in these classes, and for them to appear on the register.

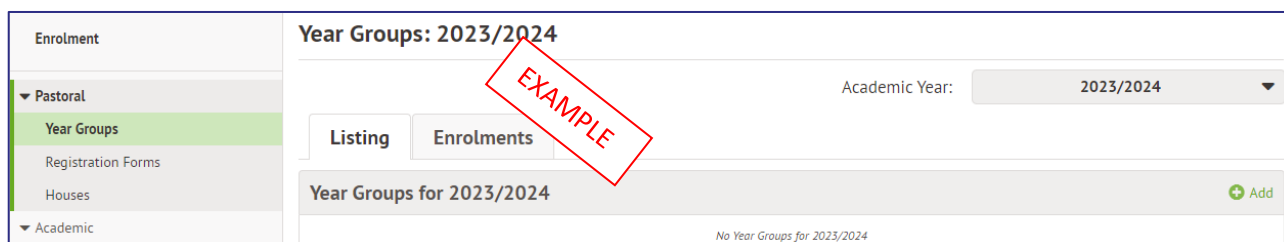
The setup will look something like this:

Courses & Classes	+ Add
↳ Nursery	▶
↳ Reception	▶
↳ Form REAZ	▶
↳ Monday AM	▶
↳ Monday PM	▶
↳ Tuesday AM	▶
↳ Tuesday PM	▶
↳ Wednesday AM	▶
↳ Wednesday PM	▶
↳ Thursday AM	▶
↳ Thursday PM	▶
↳ Friday AM	▶
↳ Friday PM	▶

Enrolling your students

The next step is to enrol your students into this class, so they will appear on the registers.

We recommend using the bulk enrolment page by going to **Students / Enrolment / Courses / Bulk Enrolment**.

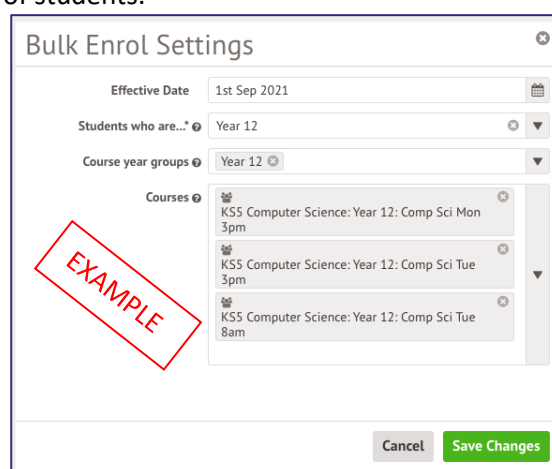
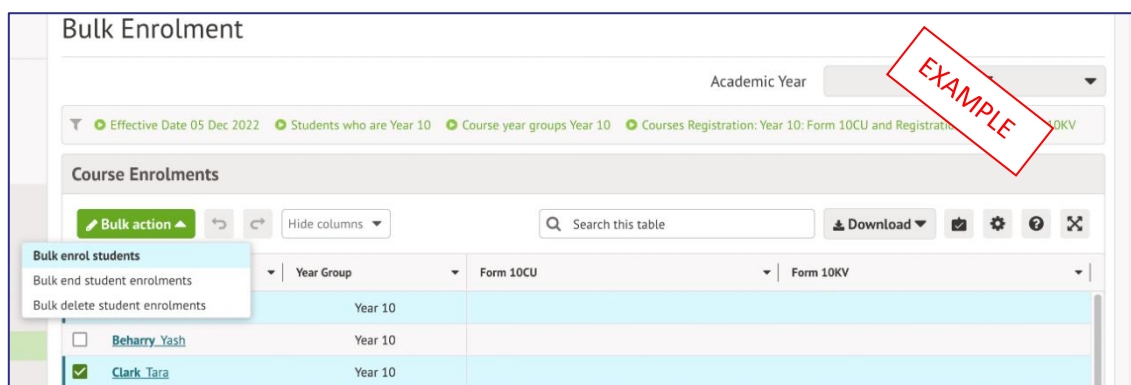


The page will default to show the lowest year group at your school but you can **click into the filters** at the top of the page to change this.

- Use the **Students who are...** filter to narrow down the students to a particular year group. This ensures the table loads quickly if you have loads of students.
- Use the **Course year groups** filter to narrow down the registers you can display in the table. If you select a year group here, we'll only show the registers linked to that year group, or that aren't linked to any year group (for when you have mixed year groups).

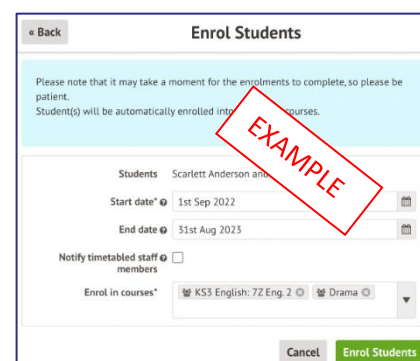
If you select to only show certain courses, these will display in the table.

1. Tick the boxes next to all the students who will be attending your school at the same time.
2. Click the **Bulk action** button and select **Bulk enrol students**.

3. In the slide over, choose the dates they should be enrolled into these registers for,
4. Select the registers, and whether to notify the teachers of the new joiners
5. Click **Enrol students**.

The enrolments will then process in the background.



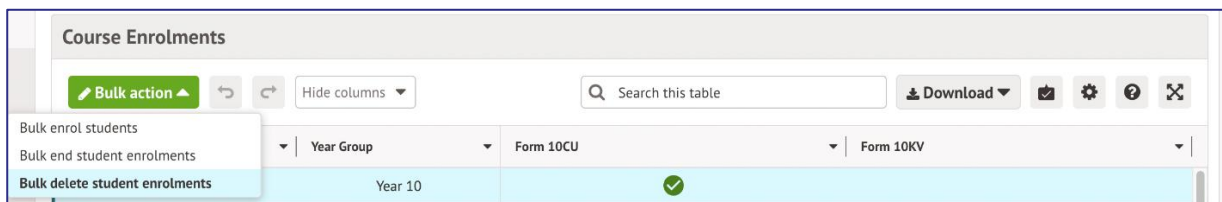
This can take some time for the enrolments to completely pull through onto this page, so you may need to refresh your page to get them to show.

 Course enrolments will be run in the background, please check back later. 

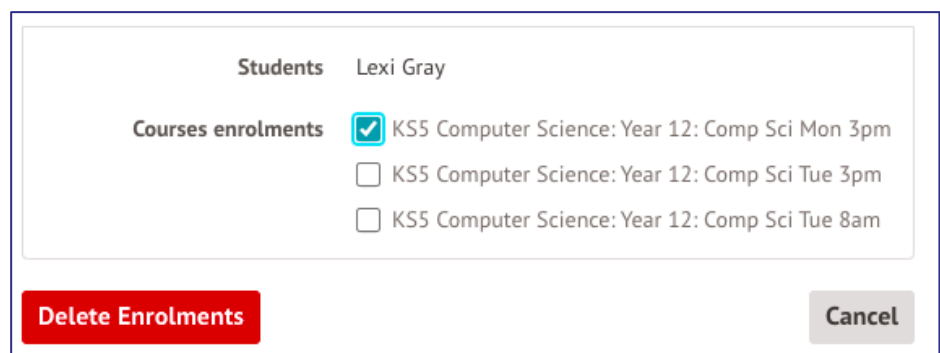
Deleting an enrolment

If you've added an enrolment incorrectly, you can remove it (as long as you've not already started taking attendance for this register).

1. Tick the boxes next to all the students who you've added incorrectly,
2. Click the **Bulk action** button
3. Select **Bulk delete student enrolments**.



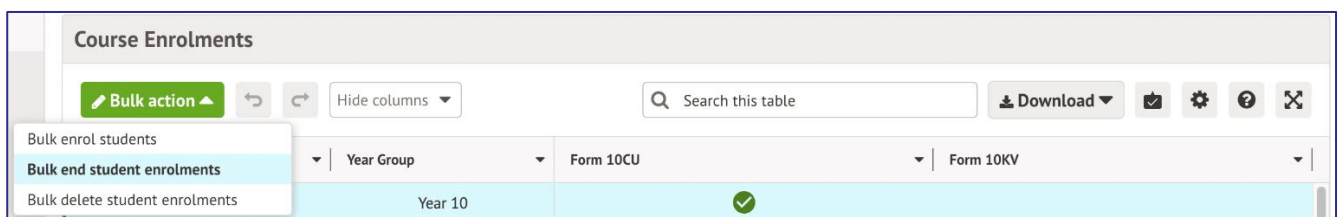
4. In the slide over, choose which registers to remove the enrolment into.



Changing enrolments

If a student is changing the sessions they are attending for, you can end their current enrolments and add new ones.

1. Tick the boxes next to all the students for who you want to change enrolments,
2. Click the **Bulk action** button
3. Select **Bulk end student enrolments**.



4. In the slide over, choose which registers to end the enrolment into.

The students will then no longer be enrolled into those registers from the **End date** you select.

You can check the students' enrolment has changed by using the date selector in the filters.

Students

Melissa Lewis

End date*

19th Nov 2021

Courses enrolments

☒ K55 Computer Science: Year 12: Comp Sci Mon 3pm
☒ K55 Computer Science: Year 12: Comp Sci Tue 3pm
☐ K55 Computer Science: Year 12: Comp Sci Tue 8am

Cancel

End Enrolments

Return to School / School Year Set up

Mark as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button.

Registers

Setup 2023/2024

You need to complete one of these steps to ensure you have registers. Please choose only one setup option for each class. Completing more than one option per class could create duplicate lessons.

A. Schedule Sessions from Registration Forms recommended for primary schools

B. Set up and promote Courses, Classes, Teaching Groups and import Timetable recommended for secondary schools

C. Import Courses & Classes from TimeTable

Instructions

Registers setup steps are optional. Once you have reviewed Registers, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

↶ Skip for now

If you wish to return to this step and make any changes, click the red **Return to incomplete** button.

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

School Year Setup

2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Complete
7. Meals	Available
8. Interventions	Available
Review School Year Setup	

Registers

Setup 2023/2024

You need to complete one of these steps to ensure you have registers. Please choose only one setup option for each class. Completing more than one option per class could create duplicate lessons.

A. Schedule Sessions from Registration Forms recommended for primary schools

Instructions

Registers setup was marked as complete on 17 Feb 2023, 12:17. click the button below to return Registers to incomplete.

Return to incomplete

Amend Registers

Returning Registers to incomplete will **prevent any steps** that depend on this from being completed.

Are you sure you want to do this?

Cancel

Return to Incomplete

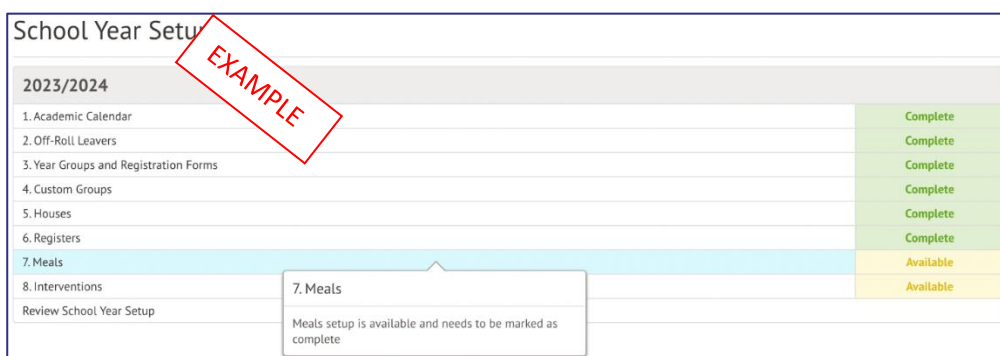
Chapter 8 Meals

If your School is using Arbor Meals, please follow the below instructions. If not you can 'mark as completed'

Meals and Meal Provisions

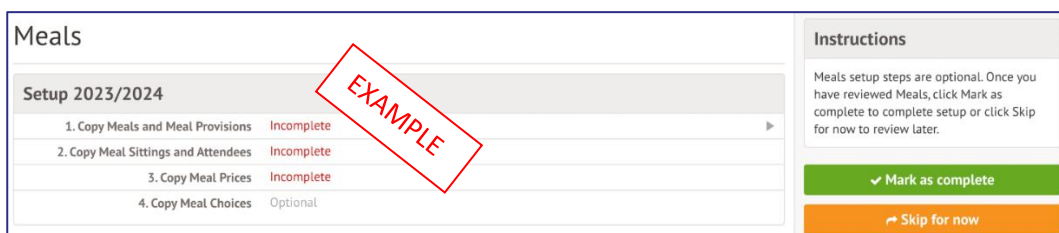
School / School Structure / School Year Setup

1. Select step **7. Meals**.



2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Complete
7. Meals	Available
8. Interventions	Available
Review School Year Setup	

7. Meals
Meals setup is available and needs to be marked as complete

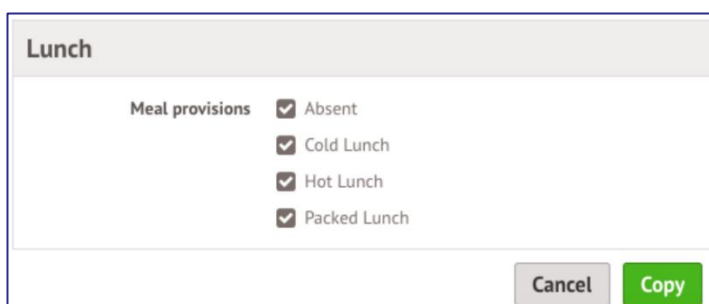


Setup 2023/2024	
1. Copy Meals and Meal Provisions	Incomplete
2. Copy Meal Sittings and Attendees	Incomplete
3. Copy Meal Prices	Incomplete
4. Copy Meal Choices	Optional

Instructions
Meals setup steps are optional. Once you have reviewed Meals, click Mark as complete to complete setup or click Skip for now to review later.

[✓ Mark as complete](#)
[↶ Skip for now](#)

2. Click on **Copy Meals and Meal Provisions**. A slide over will appear containing a list of the Meals and Meal Provisions for the next year.
3. Tick the ones you would like to copy to next year, and untick the ones that should not be copied. For any provision that is ticked, the meal it belongs to will automatically be copied over.
4. When you are happy you have selected the meals you want to copy over click on the green **Copy** button at the bottom of the slide-over.



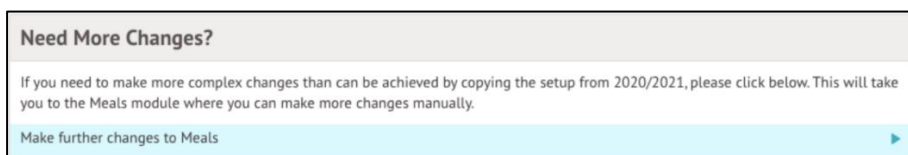
Lunch

Meal provisions	
☒ Absent	
☒ Cold Lunch	
☒ Hot Lunch	
☒ Packed Lunch	

[Cancel](#) [Copy](#)

Adding new provisions

You can set up meals from this page, either by clicking into the **Make further changes to meals** section if you already have other meals. The process is then similar to the standard process



Need More Changes?

If you need to make more complex changes than can be achieved by copying the setup from 2020/2021, please click below. This will take you to the Meals module where you can make more changes manually.

[Make further changes to Meals](#)



Copy Meal Sitzings and Attendees

1. Click on **step 2. Tick the meal sittings and attendees** you would like to copy and untick the ones that should not be copied. **If you do not copy the sitting timetable or at least one sitting attendee group, the sitting itself will not be copied.**

We recommend copying over your attendees to make sure teachers can access the Meal Register for their classes.

Copy Meal Prices

1. Tick the prices you would like to keep and untick the ones you would like to discard. The current price is shown in brackets, but **this can be changed later.**

Copy Meal Choices

Step 4 is optional and will depend on whether you want meal registers to be pre-filled with student's regular meal choices. If you do, click **Copy Meal Choices**.

Check you'll have meal registers in September

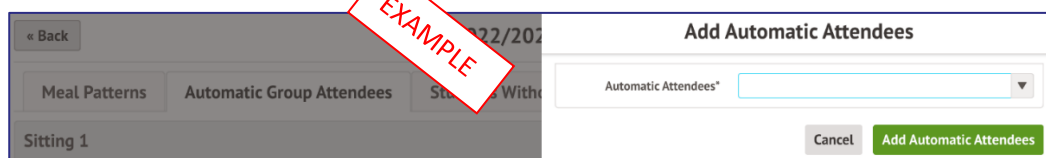
You'll need to make sure you've set up meals correctly to ensure you'll be able to select student's meal choices in the Meal Registers. If you have not yet set your attendees for meals, your meal register will be blank. To fix this:

School / Meals / Setup.

1. Select the next academic year from the drop-down menu.
2. Click into **Attendees** and go to the **Automatic Group Attendees** tab.

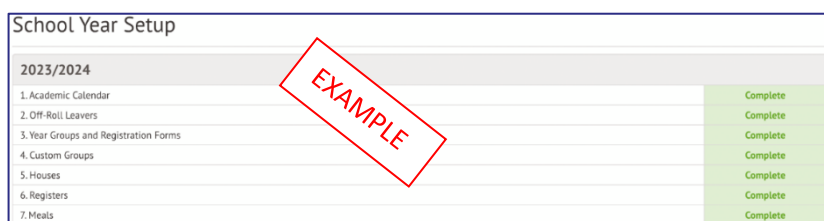
3. Click **+Add** to add students.
4. Select all the registration forms to add to the meal, then click **Add Automatic Attendees**.

This will then generate your meal registers. If you want to set a regular meal choice that students will have every day, you see how to do this in the **Optional - Regular Meal Choices** section here:



Mark as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button.



2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Complete
7. Meals	Complete

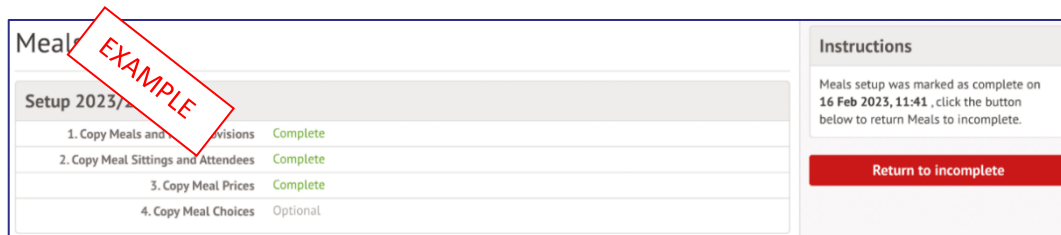
Instructions

Meals setup steps are optional. Once you have reviewed Meals, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

If you wish to return to this step and make any changes, click the red Return to incomplete button.

You must click the Mark as Complete button again to save your changes and enable you to continue editing the all the next sections.



Setup 2023/24	
1. Copy Meals and Divisions	Complete
2. Copy Meal Sittings and Attendees	Complete
3. Copy Meal Prices	Complete
4. Copy Meal Choices	Optional

Instructions

Meals setup was marked as complete on **16 Feb 2023, 11:41**, click the button below to return Meals to incomplete.

Return to incomplete

Amend Meals

Returning Meals to incomplete will **prevent any steps** that depend on this from being completed.

Are you sure you want to do this?

Cancel

Return to Incomplete

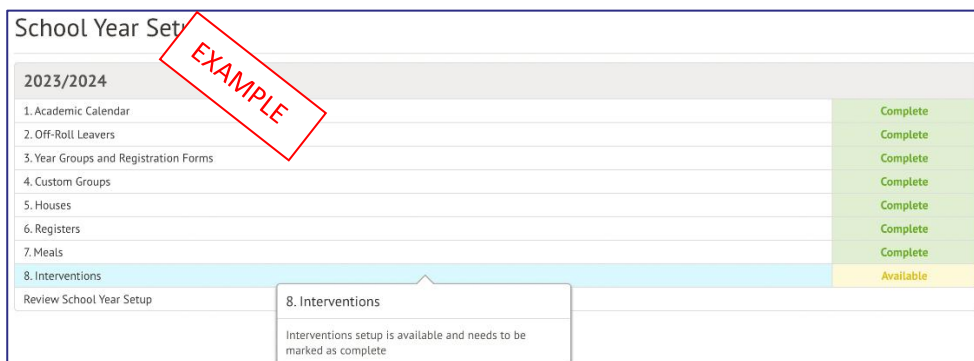
Chapter 9 Interventions

If your School uses Arbor Interventions please follow the below

Copy interventions

School / School Structure / School Year Setup

1. Select step **8. Interventions**.



School Year Setup

2023/2024

1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Complete
7. Meals	Complete
8. Interventions	Available

Review School Year Setup

8. Interventions

Interventions setup is available and needs to be marked as complete.



Interventions

Setup 2023/2024

1. Copy Interventions 0 out of 1 Interventions copied

Review

Interventions (2023/2024)

No Interventions exist for 2023/2024

Instructions

Interventions setup steps are optional. Once you have reviewed Interventions, click Mark as complete to complete setup or click Skip for now to review later.

✓ Mark as complete

↶ Skip for now

2. Tick the interventions you would like to copy over to next year, and then click **Copy Interventions**.



Interventions

Setup 2023/2024

1. Copy Interventions 0 out of 1 Interventions copied

Review

Interventions (2023/2024)

No Interventions exist for 2023/2024

Copy Interventions

Below is a list of all Interventions in the current academic year. Tick the ones you would like to copy to the next academic year.

Interventions (2022/2023)

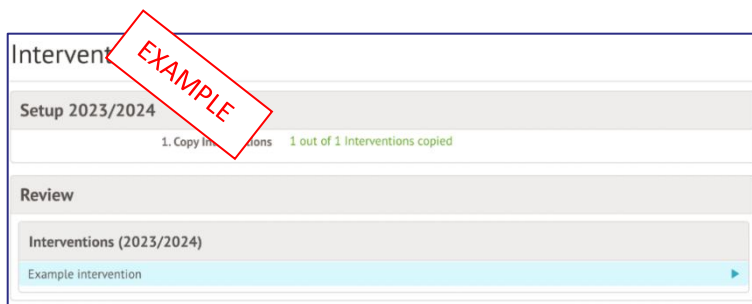
Intervention	
Example intervention	☒

Cancel Copy Interventions

Editing the intervention

1. Click on an intervention to visit the overview.

You'll need to then complete the intervention setup to create intervention groups, add students and schedule intervention sessions.



Intervention

Setup 2023/2024

1. Copy Interventions 1 out of 1 Interventions copied

Review

Interventions (2023/2024)

Example intervention

Example intervention Print to PDF

Overview Timetable slots Intervention Details Students Ad Hoc Sessions Costs and Funding

Intervention details

Category

Participant Criteria None set

Effective dates 01 Sep 2023 - 31 Aug 2024

Intervention Groups Add

Hide columns

Group Name Enrolled Students Timetable Slots Lead Staff Member

Mark as complete

When you are happy that this section is now complete, click the green **Mark as Complete** button.

Interventions

Setup 2023/2024

1. Copy Interventions Interventions copied

Review

Interventions (2023/2024)

Example intervention

Instructions

Interventions setup steps are optional. Once you have reviewed Interventions, click Mark as complete to complete setup or click Skip for now to review later.

Mark as complete

Skip for now

If you wish to return to this step and make any changes, click the red **Return to incomplete** button, or click **Make further changes to interventions**.

School Year Setup

2023/2024

1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Complete
7. Meals	Complete
8. Interventions	Complete
Review School Year Setup	

You must click the **Mark as Complete** button again to save your changes and enable you to continue editing the all the next sections.

Interventions

Setup 2023/2024

1. Copy Interventions 1 out of 1 Interventions copied

Review

Interventions (2023/2024)

Example intervention

Make further changes to Interventions

Instructions

Interventions setup was marked as complete on 16 Feb 2023, 12:04, click the button below to return Interventions to incomplete.

Return to incomplete

Amend Interventions

Returning Interventions to incomplete will prevent any steps that depend on this from being completed.

Are you sure you want to do this?

Cancel Return to Incomplete

Chapter 10 Review School Year Setup

Before you finish, there are two things you'll need to do:

- Review your setup
- Set up other important things for next year that aren't built into the New School Year Setup workflow, like your Assessments and Behaviour

School Year Setup	
2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Complete
7. Meals	Complete
8. Interventions	Complete
Review School Year Setup	

Reviewing your setup

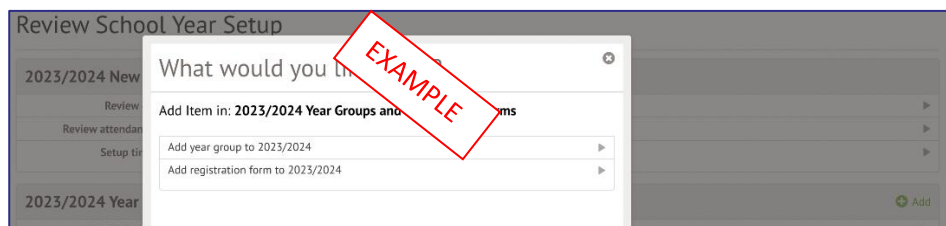
Manage enrolments

1. Click on the last step to review your setup.
 - **Review enrolments for next academic year** - move students into different Year Groups, Registration Forms or Houses.
 - **Review attendance patterns for next academic year** - if you've set up Nursery registers to use attendance patterns, you can manage attendance patterns from here.

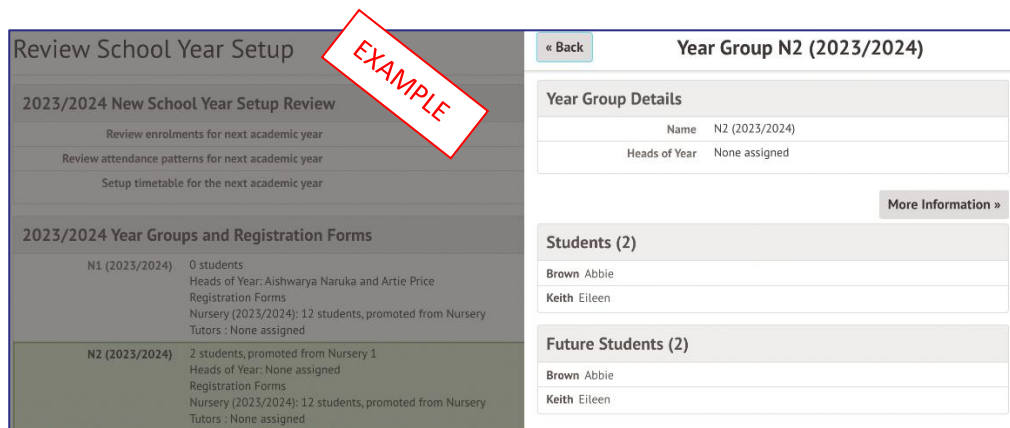
Review School Year Setup	
2023/2024 New School Year Setup Review	
Review enrolments for next academic year	▶
Review attendance patterns for next academic year	▶
Setup timetable for the next academic year	▶

Review Enrolments				
Review Enrolments (2023/2024)				
Bulk action ↶ ↷ Hide columns Search this table				
Student ↑	Year Group	Registration Form	House	
Adams Adam	Year 7 (2023/2024)	Form 7BG (2023/2024)	Colville (2023/2024)	
Adams Jade	Year 7 (2023/2024)	Form 6BY (2023/2024)	Acklam (2023/2024)	
Allen Callum	Year 7 (2023/2024)	Form 13HD (2023/2024)	Colville (2023/2024)	
Allen Graham	Year 4 (2023/2024)	Form 4SU (2023/2024)	Ladbroke (2023/2024)	
			Westbourne (2023/2024)	

You can also review your Year Groups and Registration Forms. If you need to add any, just click **+Add**.



Clicking on a Year Group will allow you to see all the students enrolled in it, or you can click **More Information** to view and edit the setup of your year group further.



Check your setup

- Are your Academic Calendar term dates correct?
- Have you recorded when your leavers will leave?
- Will your students be in the right groups?
- Have you scheduled your registers?
- Do you have registers for your first day of term?

If you're seeing a banner on your site, it means you haven't quite completed one or more of the New School Year Setup steps.

Urgent Action Required

Registration forms, classes and lessons have not been set up for next year. This means teachers won't be able to take attendance on the first day of term! To fix this, see part 4 of our Help Centre article by clicking the button below.

[Help Centre article](#)

Import CTF's for New Pupils

Ensure you have received and imported a CTF for all new pupils on roll from their previous schools.

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).

Other things to prepare

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



Parent / Student Portal

Parents are able to view any students on the Parent Portal and Arbor App until the end of the academic year the student was last enrolled in.

If they are linked to more than one student, at the end of the academic year they will lose access to the child who has left the school but will still be able to access their other child(ren).

If all of their children have left the school, they won't be able to log in.

If you want to prevent access to the Parent Portal before this time, you can disable their account from the User Details section of their profile.

For guardians to log in when their child is not a current student, you'll need to check your settings:

- For guardians of Future Students starting in September to log in, you will need to have completed step 3 **Year Group and Registration Forms**, of the new school year setup process.
- For guardians of Applicants (applicants to your school for this or future years who have an application status that is not Enrolled, Withdrawn or Rejected) to log in, you'll need to have switched the Parent Portal on for guardians of applicants.

Personnel Records

Create Staff records for newly appointed staff and send Arbor 'Welcome' message to enable log in
End Employment for staff leaving at the end of the academic year.

Assessments

If you use assessments in Arbor, you'll need to copy your assessments across to next year. They will not automatically copy over.

Data Collection Policies are linked to the Assessment policy. Because you need to select the assessments to create or copy over each year, you also need to define your Data Collection Policies each year if you use them at your school.

Behaviour

When the new school year begins, you'll need to set up certain areas of behaviour.

Don't worry, you won't need to set everything up. To prepare for September, you'll just need to set up detentions and add your Internal exclusion types.

School Shop

If you use the School Shop on your site, the products will remain active, and available to the students who were in the student groups selected last year. To make the items available to new students, or different student groups, you'll need to add the new students groups, then add prices for them: [School Shop](#)

Shared Teaching

Only schools that currently use Shared Teaching need to complete this.

You must set up your Shared Teaching courses - please follow our instructions here: [Set up Shared Teaching courses for the next academic year](#)

Chapter 11 The New Academic Year 2025 - 26

Introduction

Now that the Academic Year has started it is recommended to check your School Year set up to ensure a smooth beginning to the new School year.

Registers

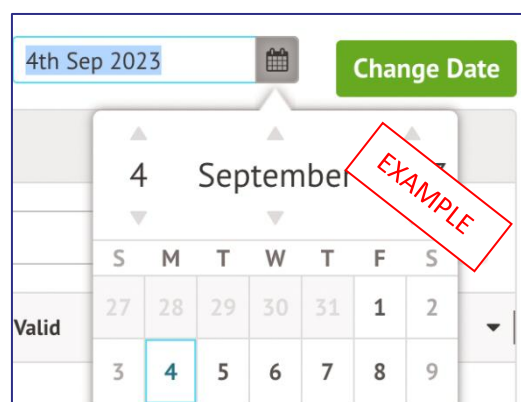
To ensure that registers are available for your first day back:

Students / Attendance / Registers By Date.

1. Click the calendar icon
2. Select the first day your registers should exist for
3. Click **Change Date**.

If you've set up your registrations correctly, they should appear on this page! If they don't, and you're sure you haven't scheduled a holiday on this day, this means either:

- you haven't scheduled your timetable to start on the right date – please check the **scheduled sessions or Academic Year set up**.
- You haven't enrolled students in your **Courses and Classes**



Mon, 04 Sep 2023					
Hide columns					
Period	Lesson/Event	Staff	Opened	Complete + Valid	Marks
08:00 - 12:00	Year 1: Form 1MI (2023/...	Mareen Jacobs			
08:00 - 12:00	Year 1: Form 1TP (2023/...	Terence Phillips			
08:00 - 12:00	Year 2: Form 2QH (2023/...	Lola Richards			

Mon, 04 Sep 2023					
Hide columns					
Period	Lesson/Event	Staff	Opened	Complete + Valid	Marks
08:00 - 08:30	Year 7: Form 7BG (2023/...				
08:00 - 08:30	Year 7: Form 7GF (2023/...				
08:00 - 08:30	Year 8: Form 8HV (2023/...				
08:00 - 08:30	Year 8: Form 8LR (2023/...				

Data Quality Checking

Data Quality Dashboard allows you to check and update key elements of student, guardian and staff data.

School / Data / Data Quality Dashboard.

First, you'll see an overview of how many data points we recommend you check. Use the left-hand menu to select the data you want to check - you can choose to work on Students, Guardians or Staff

Dashboard
Students
Guardians
Staff
School Workforce Census
Suspended Duplicates
Student Record Changes

Data Quality Dashboard

Current & Future Guardians

Hide columns

Download
Print
Refresh
Help
Fullscreen

Type/Category	Errors	Incomplete	Warnings
Email Addresses	918	51	5
Telephone Numbers	517	54	1
Postal Addresses	1	129	15

Showing 3 results

Current & Future Students

Hide columns

Download
Print
Refresh
Help
Fullscreen

Type/Category	Errors	Incomplete	Warnings
Email Addresses	17	5	0
Telephone Numbers	10	10	0
Postal Addresses	1	2	1

Showing 3 results

Current & Future Staff



Appendix A – Registers for Nursery Pupils

If you have nursery students, you need to schedule registration a little differently because not all nursery students attend full time (10 sessions of education a week). Making sure Arbor knows whether a nursery student is due to attend ensures your attendance data remains accurate.

Follow the guidance below to schedule your nursery registers **before** following the instructions in the New School Year Setup Step 6 - Registers for Primaries.

Which setup option should we use?

There are two ways of making sure students appear in the right registers only - using enrolments or using Attendance Patterns. We've included some details about each below.

Option 1 - Manage registers through Bulk Enrolments

New students must be enrolled in their lessons.

If you'll be using bulk enrolment, you'll need to add enrolments for your nursery students. **Whenever you have a new student you'll need to repeat this process to enrol them.**

You can easily enrol students into the right registers, add an end date if their enrolment will be changing and see what registers students are enrolled in at any point in the year.

Option 2 - Use Attendance Patterns if students attend the same times every day of the week

Using the Attendance Pattern method, you can include students in all morning roll call registers, all afternoon roll call registers, or both morning and afternoon roll-call registers.

For most schools, we recommend option 1 instead, as you cannot use Attendance Patterns for students who do not attend during the same times every day of the week. For example, a student attends all day Monday-Wednesday but doesn't attend Thursday or Friday, or a student attends afternoon only on Monday and mornings the rest of the week.

Setting up your nursery registers for next year

Create your registers

1. Go to the **6. Registers** step of your New School Year setup.

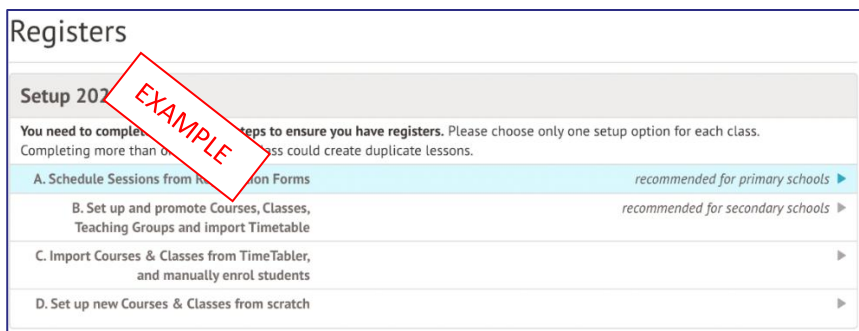
School Year Setup	
2023/2024	
1. Academic Calendar	Complete
2. Off-Roll Leavers	Complete
3. Year Groups and Registration Forms	Complete
4. Custom Groups	Complete
5. Houses	Complete
6. Registers	Available
7. Meals	Available
8. Interventions	Available
Review School Year Setup	

EXAMPLE

6. Registers

Registers setup is available and needs to be marked as complete

2. Select option **A. Schedule Sessions from Registration Forms**.



Registers

Setup 2023/24

You need to complete the following steps to ensure you have registers. Please choose only one setup option for each class. Completing more than one option could create duplicate lessons.

A. Schedule Sessions from Registration Forms *recommended for primary schools*

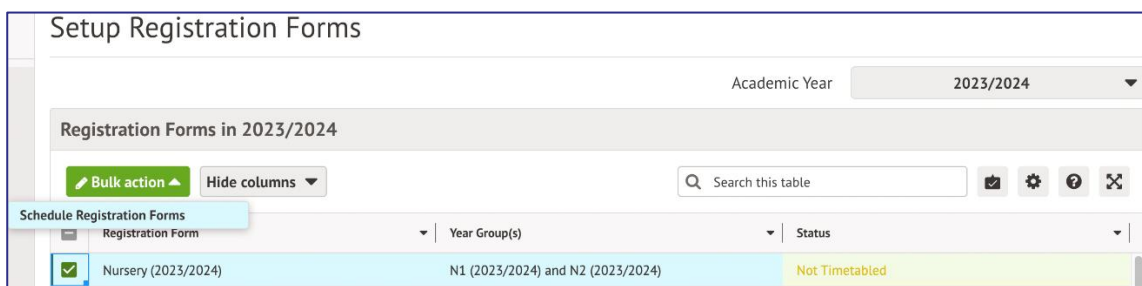
B. Set up and promote Courses, Classes, Teaching Groups and import Timetable *recommended for secondary schools*

C. Import Courses & Classes from TimeTabler, and manually enrol students

D. Set up new Courses & Classes from scratch

This will bring you to a list of all the registration forms you have.

3. Tick the box next to your nursery registration form(s),
4. Click the **Bulk action** button to select **Schedule Registration Forms**.



Setup Registration Forms

Academic Year: 2023/2024

Registration Forms in 2023/2024

Bulk action **Hide columns**

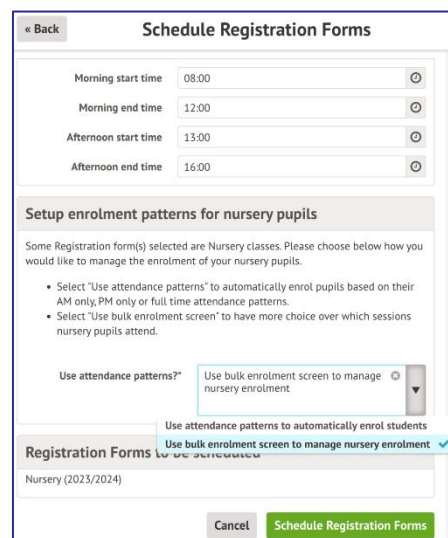
Search this table

Schedule Registration Forms

Registration Form	Year Group(s)	Status
☒ Nursery (2023/2024)	N1 (2023/2024) and N2 (2023/2024)	Not Timetabled

A slide-over will appear where you enter the start and end times for the Registration Forms you have selected.

5. Enter the start and end times, making sure your Morning end time falls at the beginning of lunchtime (to prevent errors during Census), and your Afternoon end time is the end of the school day. Leave a gap for lunch.
6. Select which option you will use.



Schedule Registration Forms

Morning start time: 08:00

Morning end time: 12:00

Afternoon start time: 13:00

Afternoon end time: 16:00

Setup enrolment patterns for nursery pupils

Some Registration form(s) selected are Nursery classes. Please choose below how you would like to manage the enrolment of your nursery pupils.

- Select "Use attendance patterns" to automatically enrol pupils based on their AM only, PM only or full time attendance patterns.
- Select "Use bulk enrolment screen" to have more choice over which sessions nursery pupils attend.

Use attendance patterns? **Use bulk enrolment screen to manage nursery enrolment**

Use attendance patterns to automatically enrol students

Registration Forms **Use bulk enrolment screen to manage nursery enrolment**

Nursery (2023/2024)

Cancel **Schedule Registration Forms**

If you've chosen to use **bulk enrolments**, when you return to step 6 (by clicking **Setup** in the left-hand menu), you will now see this banner and structure.

It looks like some nursery students are not enrolled into a course yet. You can do this via the nursery bulk enrolment screen.

Nursery bulk enrolment

If you've chosen to use **Attendance Patterns**, when you return to step 6 (by clicking **Setup** in the left-hand menu), you will now see this banner and structure.

You have set up courses with automatic enrolments that rely on an attendance pattern being set for all students in the group. However, it looks like some students are missing their attendance pattern. To ensure your students are enrolled correctly, please review attendance patterns for 2021/2022.

[Review Attendance Patterns](#)

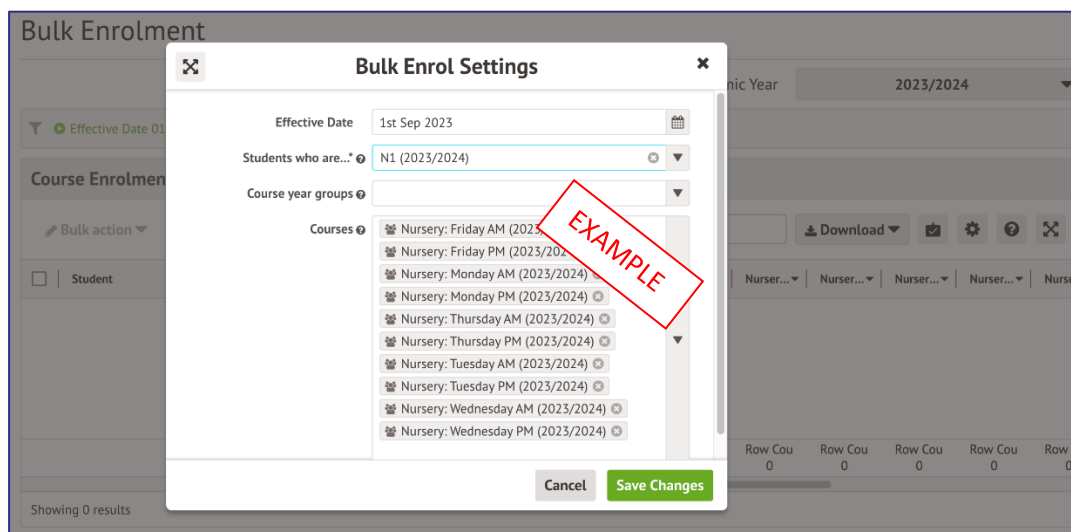
Add Bulk Enrolments

If you'll be using bulk enrolment, you'll need to add enrolments for your nursery students. **Whenever you have a new student you'll need to repeat this process to enrol them.**

- Click the **Nursery bulk enrolment** button on Step 6 of the New School Year Setup or
- go to **Students / Enrolment / Courses / Bulk Enrolment** and change the academic year to next year.

The page will default to show the lowest nursery year group at your school but you can click into the filters at the top of the page to change this.

- Use the **Students who are...** filter to narrow down the students to a particular year group. This ensures the table loads quickly if you have loads of students.
- Use the **Course year groups** filter to narrow down the registers you can display in the table. If you select a year group here, we'll only show the registers linked to that year group, or that aren't linked to any year group (for when you have mixed year groups).



Bulk Enrolment

Bulk Enrol Settings

Effective Date: 1st Sep 2023

Students who are...: N1 (2023/2024)

Course year groups:

Courses:

- Nursery: Friday AM (2023/2024)
- Nursery: Friday PM (2023/2024)
- Nursery: Monday AM (2023/2024)
- Nursery: Monday PM (2023/2024)
- Nursery: Thursday AM (2023/2024)
- Nursery: Thursday PM (2023/2024)
- Nursery: Tuesday AM (2023/2024)
- Nursery: Tuesday PM (2023/2024)
- Nursery: Wednesday AM (2023/2024)
- Nursery: Wednesday PM (2023/2024)

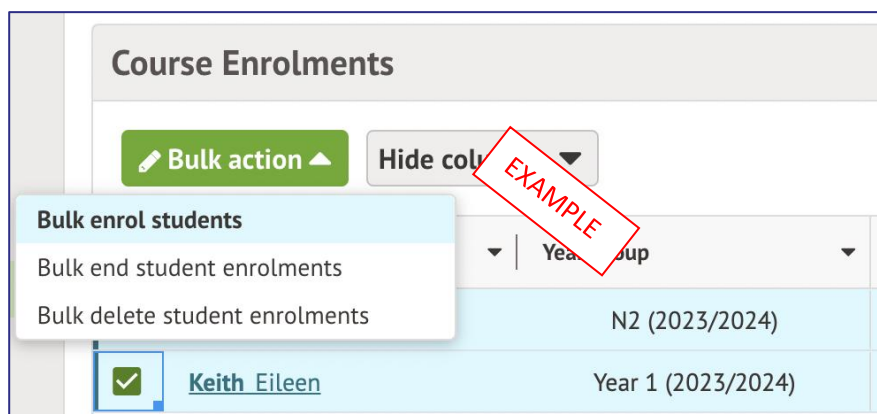
Cancel Save Changes

If you select to only show certain courses, these will display in the table.

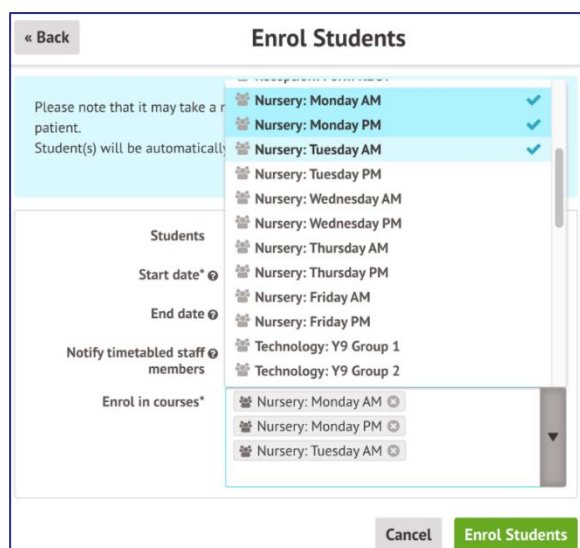
Course Enrolments											
Bulk action ▼		Hide columns ▼		Search this table				Download ▼			
☐	Student	▼	Year Group	Nurser... ▼	Nurser... ▼	Nurser... ▼	Nurser... ▼	Nurser... ▼	Nurser... ▼	Nurser... ▼	Nurser...
☐	Brown Abbie		N2 (2023/2024)	EXAMPLE							
☐	Keith Eileen		Year 1 (2023/2024)								

Enrolling students

1. Tick the boxes next to all the students who will be attending your school at the same time.
2. Click the **Bulk action** button
3. Select **Bulk enrol students**.



4. In the slide over, choose the dates they should be enrolled into these registers for, and select the registers
5. Click **Enrol students**.



The enrolments will then process in the background. This can take some time for the enrolments to completely pull through onto this page, so you may need to refresh your page to get them to show.

 Course enrolments will be run in the background, please check back later. 

Repeat this step until all of the students are enrolled in the right registers.

Course Enrolments											
Bulk action		Hide columns	Search this table				Download				
☐	Student	Year Group	Nurser...	Nurser...	Nurser...	Nurser...	Nurser...	Nurser...	Nurser...	Nurser...	Nurser...
☐	Brown Abbie	N2 (2023/2024)	✓	✓	✓	✓	✓				
☐	Keith Eileen	Year 1 (2023/2024)	✓	✓	✓	✓	✓			✓	

Deleting an enrolment

If you've added an enrolment incorrectly, you can remove it (as long as you've not already started taking attendance for this register).

1. Tick the boxes next to all the students who you've added incorrectly, then click the **Bulk action** button and select **Bulk delete student enrolments**.
2. In the slide over, choose which registers to remove the enrolment into.

Bulk Enrolment

Effective Date 01 Sep 2023 Students who are N2 (2023/2024)

Courses Nursery: Friday AM (2023/2024), Nursery: Friday PM (2023/2024), Nursery: Monday AM (2023/2024), Nursery: Monday PM (2023/2024), Nursery: Tuesday AM (2023/2024), Nursery: Tuesday PM (2023/2024)

Course Enrolments

Bulk action **Hide columns** Search

☐	Student	Year Group	Nurser...	Nurser...
☐	Brown Abbie	N2 (2023/2024)	✓	✓
☒	Keith Eileen	Year 1 (2023/2024)	✓	✓

You have selected 1 row

Bulk Delete Enrolments

Please note that, if students have any attendance for these courses, or automatic enrolments, then their enrolments cannot be deleted.

If you need to remove a course enrolment, you can end the student enrolment. It may take a moment for the enrolments to be deleted, so please be patient.

Students Eileen Keith

Courses enrolments

- ☐ Nursery: Monday AM (2023/2024)
- ☐ Nursery: Monday PM (2023/2024)
- ☐ Nursery: Tuesday AM (2023/2024)
- ☐ Nursery: Tuesday PM (2023/2024)
- ☐ Nursery: Wednesday AM (2023/2024)
- ☐ Nursery: Wednesday PM (2023/2024)
- ☐ Nursery: Thursday AM (2023/2024)
- ☐ Nursery: Thursday PM (2023/2024)
- ☐ Nursery: Friday AM (2023/2024)
- ☐ Nursery: Friday PM (2023/2024)

Delete Enrolments **Cancel**

Changing enrolments

If a student is changing the sessions they are attending for, you can end their current enrolments and add new ones.

1. Tick the boxes next to all the students who you want to change enrolments for, then click the **Bulk action** button and select **Bulk end student enrolments**.
2. In the slide over, choose which registers to end the enrolment into.

Bulk Enrolment

Effective Date 01 Sep 2023 Students who are N2 (2023/2024)

Courses Nursery: Friday AM (2023/2024), Nursery: Friday PM (2023/2024), Nursery: Monday AM (2023/2024), Nursery: Monday PM (2023/2024), Nursery: Tuesday AM (2023/2024), Nursery: Tuesday PM (2023/2024)

Course Enrolments

Bulk action **Hide columns** Search

☐	Student	Year Group	Nurser...	Nurser...
☐	Brown Abbie	N2 (2023/2024)	✓	✓
☒	Keith Eileen	Year 1 (2023/2024)	✓	✓

You have selected 1 row

Bulk End Enrolments

Please note that, if students have any automatic enrolments, then their enrolments cannot be ended.

If you need to end a course enrolment, you can end the student enrolment. It may take a moment for the selected enrolments, so please be patient.

Students Eileen Keith

End date*

Courses enrolments

- ☐ Nursery: Monday AM (2023/2024)
- ☐ Nursery: Monday PM (2023/2024)
- ☐ Nursery: Tuesday AM (2023/2024)
- ☐ Nursery: Tuesday PM (2023/2024)
- ☐ Nursery: Wednesday AM (2023/2024)
- ☐ Nursery: Wednesday PM (2023/2024)
- ☐ Nursery: Thursday AM (2023/2024)
- ☐ Nursery: Thursday PM (2023/2024)
- ☐ Nursery: Friday AM (2023/2024)
- ☐ Nursery: Friday PM (2023/2024)

Cancel **End Enrolments**

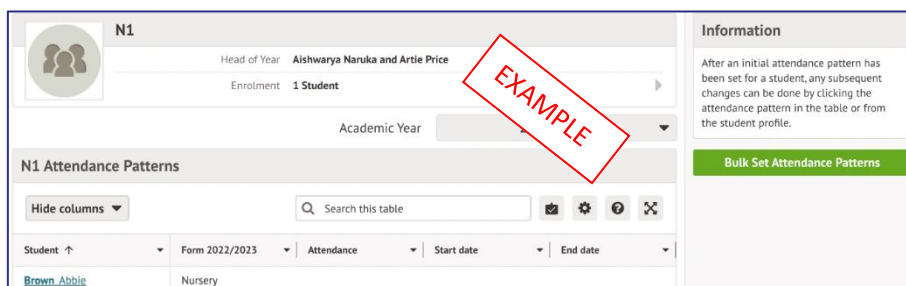
The students will then no longer be enrolled into those registers from the **End date** you select. You can check the students' enrolment has changed by using the date selector in the filters.

Attendance Patterns

If you'll be using Attendance Patterns, you'll need to set these for your nursery Students. **Whenever you have a new student you'll need to set their Attendance Pattern to make sure they appear in the right registers.**

1. Click the **Review Attendance Patterns** button on Step 6 of the New School Year Setup, or go to **Students / Enrolment / Year Groups**
2. Select the next academic year from the drop-down menu.
3. Select your nursery, then click the **Attendance Patterns** option from the left-hand menu.

4. Click the **Bulk Set Attendance Patterns** button to select the enrolment start date and pattern



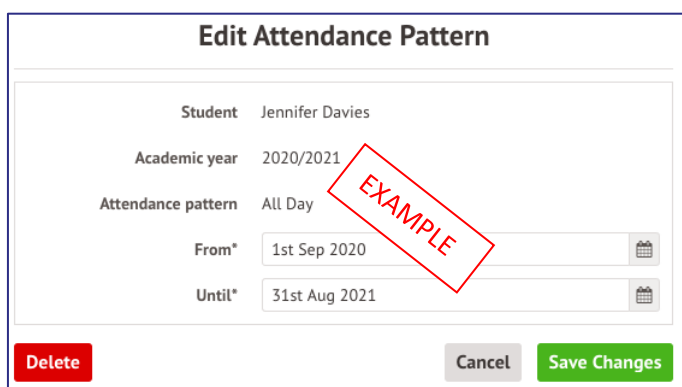
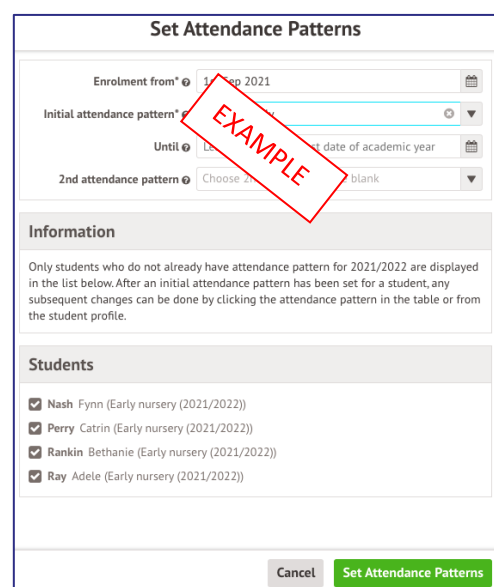
5. Select the students this applies to.

6. Click the green **Set Attendance Pattern** button.

Edit Attendance Pattern

To change an existing Attendance Pattern you'll need to delete it then add a new one.

1. Click the **Attendance** field
2. Click the **Delete** button in the slide over.



Appendix B Resources & Contacts

ICT Schools Team

01296 383500

ictschoools@buckinghamshire.gov.uk

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>

Arbor Help Centre

<https://support.arbor-education.com/>

[New School Year Setup FAQs – Arbor Help Centre](#)

