

# **Arbor End of Year Procedures 2024/2025**

and Promotion to 2025/26

# **For Secondary Phase Schools**

## **WARNING:**

The procedures must be completed <u>before</u> the start of the new academic year.

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

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

Working in Partnership with











The graphics in this booklet are a mixture of Primary and Secondary Arbor database. Some graphics may refer to a previous academic year when current year data is not available at the time of writing.

#### **Revision History**

Version	Change Description	Date
Version 1	Buckinghamshire Council ICT Schools Team	May 2025
	E&oe	

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.

#### **Buckinghamshire Council SchoolsWeb**

Refer to: <a href="https://schoolsweb.buckinghamshire.gov.uk/">https://schoolsweb.buckinghamshire.gov.uk/</a> 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

#### What Steps have to be completed?

Steps in bold are required for all schools. Other steps are optional depending on your Arbor package and requirements.

- Enter all your school dates for the year
- Import Admissions Transfer File (ATF)
- Off-Roll any Leavers
- Promote your current Year Groups and Registration Forms
- Copy over any Custom Groups you have set up that you may want to use again
- Copy over Houses and House Enrolments into the new academic year
- Enter the times for your registers to create your timetable
- Copy over meals, meal sittings and meal choices for students
- Import / Export Common Transfer Files (CTF) for leavers and joiners
- Copy over any Interventions you will continue to run
- Set up other things you'll need next year, like Assessments and Behaviour

If you don't use a certain area (such as Houses, Meals, Interventions or Custom Groups), you can mark the step as **Complete** without copying or creating anything.

1

# **Chapter 1** Academic Calendar

# **Creating the Academic Calendar**

Go to **School > School Structure > School Year Setup**. Click on the first step to create your Academic Calendar for the next year.

#### 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.

Click the option for 1. Academic Calendar.

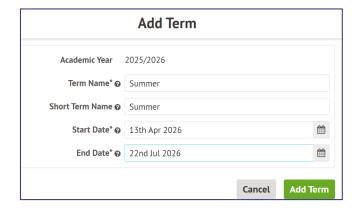
You can then complete the setup of your Academic calendar by setting up terms and adding holidays. Make sure the academic year dates also cover the summer holidays, which are considered part of the academic year.



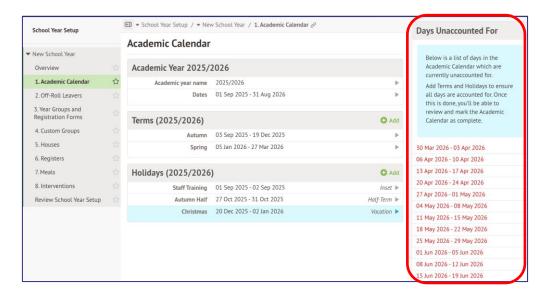
#### **Adding terms**

In the Terms section, add all the dates you are scheduled to run courses and classes for. Click **+Add** to add a new term.

**Term dates should span the full term.** Do not set up 6 half terms, because this will cause an error message when you try to add half-term holidays. Half Term holiday can be added within the Holidays section instead, shown below.



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



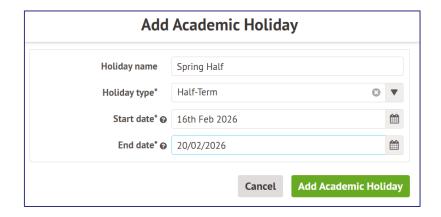
You can fill these gaps by adding in all your holidays (Half terms, Christmas, and Easter break etc) in the **Holiday** section.

#### **Adding Holidays**

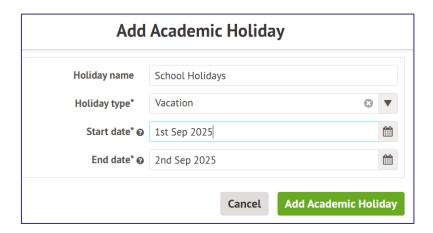
Ensure you include all of your holiday dates to ensure there are no attendance registers created on these dates. You do not have to include weekends.

#### INSET can also be added in this area.

Add in all your half terms, vacation dates and public holidays. Holidays to be set up in the UK include Christmas, Easter, and summer breaks, any inset or training days, any public holidays or religious days. Click **+Add** to add a new holiday.



You should only use the **Holiday Type** of **Half-Term** for the actual half-term breaks (October, February and May). This is to ensure you can use the **Half-Termly assessment period** for assessments, among other things.



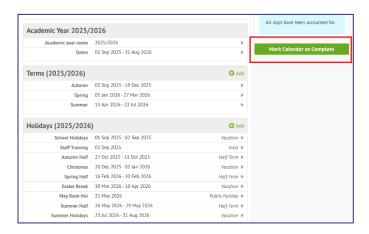
If you have a remaining gap at the start of the academic year (due to starting the calendar as advised on 1st September), you can fill this with a holiday type of **Vacation**, as it is the final part of the summer vacation.

#### 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.

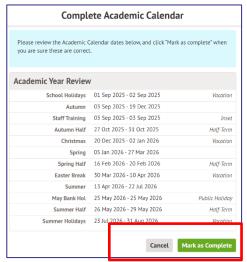
Don't worry if you haven't yet added in your inset days - you can return to this step later once you know when these will be.

Click Mark Calendar as Complete

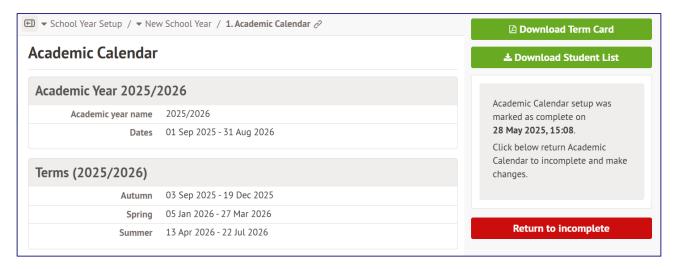


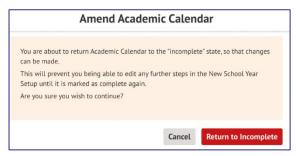
#### Review and Mark Calendar as Complete

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





You can now edit the calendar as previously.

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, you can skip to **Chapter 3 Leavers** 





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

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

**Important Note**: Please <u>always</u> refer to the DfE guidance regarding the admission and removal of students from the Registers.

#### **DfE Expected First Day of Attendance Notes**

207. Schools must enter pupils' names on the admission register on the first day that the school and a person with control of the pupil's attendance have agreed that the pupil will attend the school12. If no date has been agreed or notified, the pupil's name must be entered on the first day they attend the school. Names must be added before, or at the beginning of the first session on that day.

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

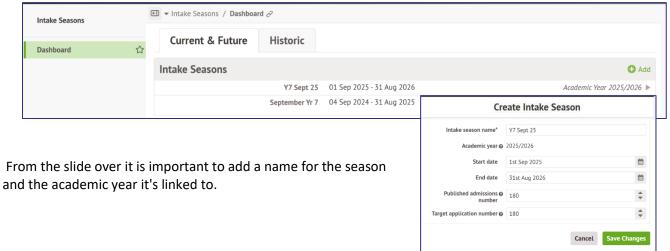
#### **Date of Admission**

- The Date of Admission must be within the new academic year.
- The date of admission must be on a day when the school is <u>open to students</u>, 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.

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.



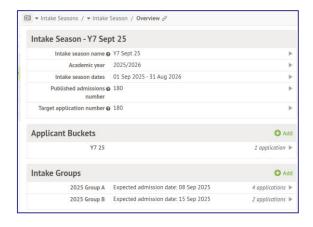
# Applicant buckets and intake groups

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

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 and non-standard aptitude testing.
- **Intake Groups** These can be used for creating multiple intakes within an academic year e.g. if you had an intake of nursery and reception students and wanted to split them.

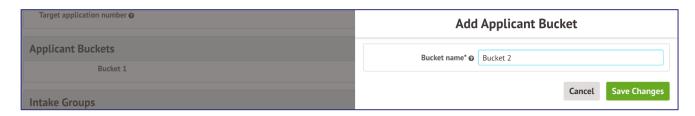
Both these areas are completely optional to use if you would like to.



#### Adding, editing and deleting Buckets/Intake Groups

#### Adding an applicant bucket

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

In this example, students start on two different dates, so two groups are set up.



## **Editing or deleting**

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



#### Using the buckets or groups when adding applicants

The process for assigning applicants to buckets or groups varies depending on <u>how you are adding them</u>. There are three relevant fields:

- Intake bucket You can choose whether to assign students to one of your buckets.
- Intake season group You can choose whether to assign students to one of your groups.

• **Bucket score** - If you allocate students a score to prioritise applicants, you can use this field. You could also use this to make a note of their score in any pre-admissions test.

Students can't be given more than one bucket score or be added to more than one bucket or group.

## **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.

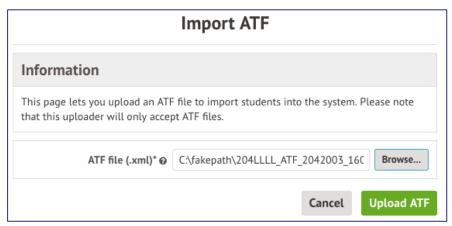
To **Import** an ATF into Arbor, go to **School > Data > Import > ATF Import.** Click on the **+Add** in the top right-hand corner.



In the slide over, click **Browse** to select the ATF file from your computer, then 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.



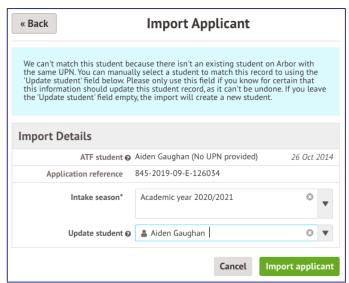


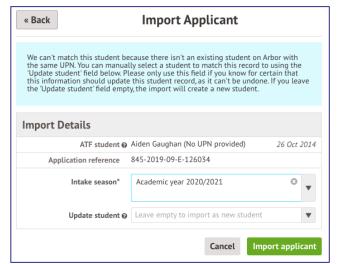
If you click on a student, you can specify an intake season if this will be different to the rest of the other students.

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.

If there is no existing applicant to match them to, you can either leave the **Update student** field blank and click **Import applicant**, or you can click **Cancel** to close the slide over and import all the applicants in bulk (shown in the next section).





#### Finish the import.

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

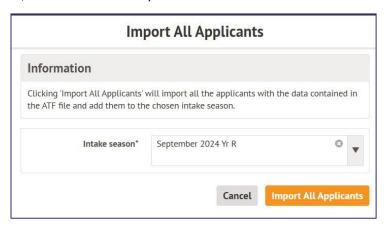


Select the intake season to import them into, then confirm the import.

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.

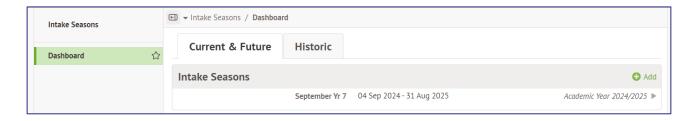




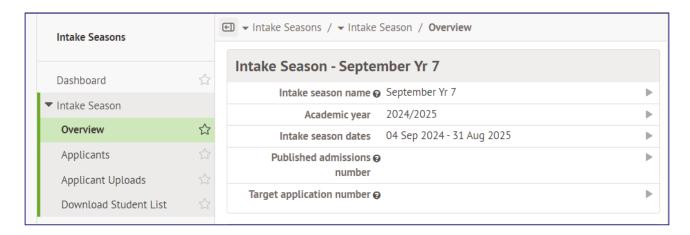
Option 2 - Manually adding applicants.

#### Students > All Students > Applicants

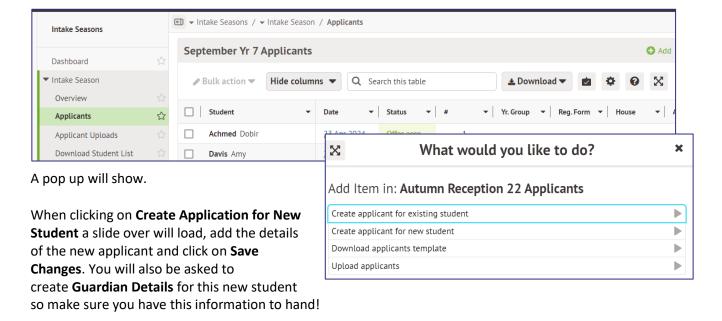
This takes you to the Intake Season Dashboard



Click on the arrow next to the Academic Year of the intake season to access the Season Overview

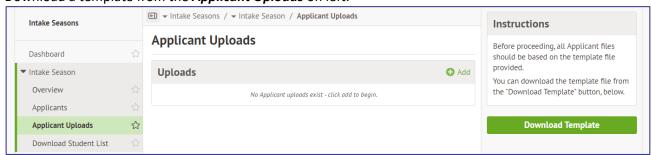


From the Applicants list on the left, click +Add in the top right-hand corner of the table.



#### Option 3 - Uploading Applicants from spreadsheet.

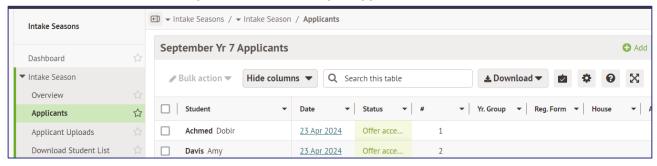
Download a template from the *Applicant Uploads* on left:

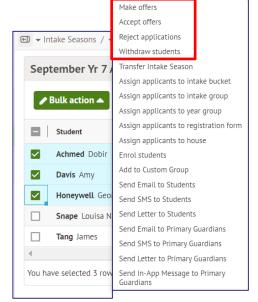


#### Log applicants as accepted, withdrawn or rejected.

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.

Just go to **Students > All Students > Applicants**, select the intake season, then go to **Applicants** on the left-hand side. From here you can simply select the students to update, then 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.

Adding applicants to a Year Group, Registration Group or House can now be done through the Bulk Update of applicant area and is covered later in the manual.

# **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, e.g. Year 6 pupils moving to Secondary school.

#### **Statutory Guidance**

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

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

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

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

#### Year 11 Leavers:

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

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

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

For information between the date of a student's last examination and 27<sup>th</sup> June attendance code C should be used.

#### Post 16 Leavers:

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

#### **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.buckinghamshire.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 MMMMMMM 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 End Date

No requirement to put an end date.

Refer to guidance on SchoolsWeb:

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

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

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

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

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

## **Recording Leavers**

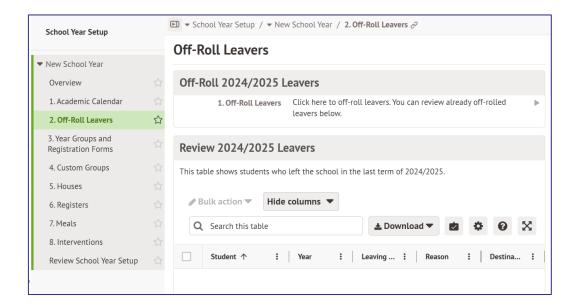
Go to *School > School Structure > School Year Setup*. Click on the second step **2. Off Roll Leavers** to unenroll the students who are leaving your school, in bulk, which helps save you time as you don't need to end students who are moving on individually via their Student Profile.



#### Leavers from earlier in the year

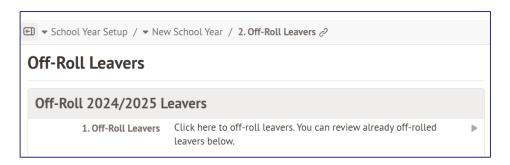
Before you get started, on this page you'll see in the Review section any students who have already left or have been given an end date within the current summer term, for example, if a student emigrated halfway through the year.

The 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



# Recording 'End of Phase' Leavers in bulk

To Off-roll your leavers, click the Off-Roll Leavers field.



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
- Year 11 if you're a Secondary
- Year 13 if you have a post-16 provision.



Click the year group to end - this will bring up a list of all students who have not already been marked as leavers.

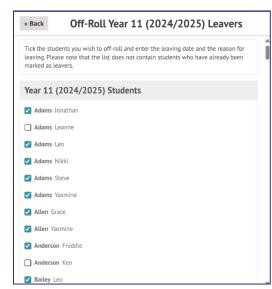
Keep ticked any students you want to be off-rolled with the same leaving date and leaving reason.

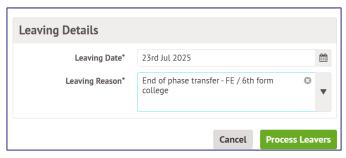
Untick any students who will be staying at your school moving from year 11 to your sixth form).

The leaving date should be a date when the pupil could have attended School i.e. the last school day of the 2024/25 academic year e.g. 23/07/2025. 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 i.e. 31/08/2024.

**Year 11**, the Leaving Reason is 'End of Phase Transfer – and the appropriate destination (Maintained School or college)





#### Pupils Leaving out of Phase / Reason for Leaving

Pupils in Year 1 to Year 5, or Year 7 to Year 10 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 2024 or other applicable date if earlier.

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**. This is available on Schoolsweb.

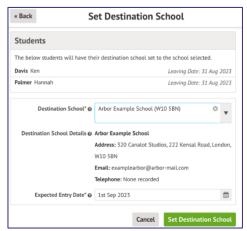
#### **Adding destinations**

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



Don't see the destination school you're looking for?

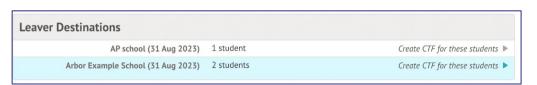
You can add it to your Linked Organisations.



**CTF** 

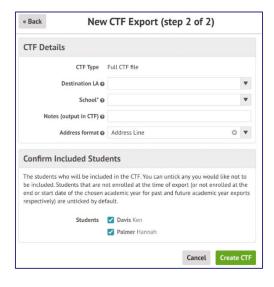
# **Generating CTFs for your leavers**

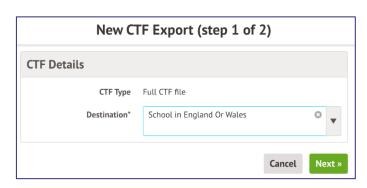
Once you've set destination schools, you can generate a with your Leaver's information. Scroll down to the very bottom of the page.



Don't see the school's name in the School field?

Click Back then select Unknown Destination in England or Wales to generate a CTF that can be imported into any school!





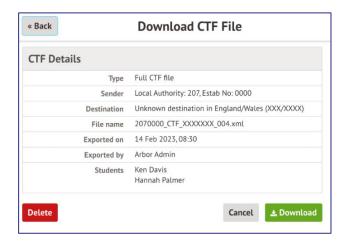
When the CTF is ready to download you'll get a notification in the top right of your Arbor site. Click the notification. **Don't see the notification? Click the refresh button in your browser.** 



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

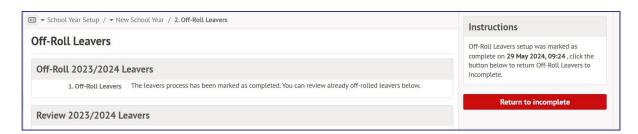
The CTF will then download to your computer into your default downloads file. **Do not open the file.** 

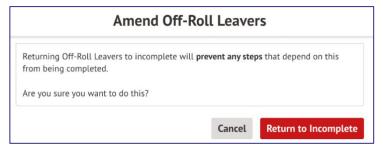
When you are happy that this section is now complete, click the green **Mark as Complete** button.





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





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

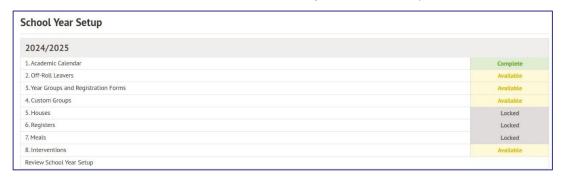
# **Chapter 4** Year Groups & Registration Forms

#### Introduction

Promotions will be applied based on what is chosen here and will not be updated if you move students between registration forms. For example, if you promote 7A into 8A, then move a student into 7B, they'll still be promoted into 8A.

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.

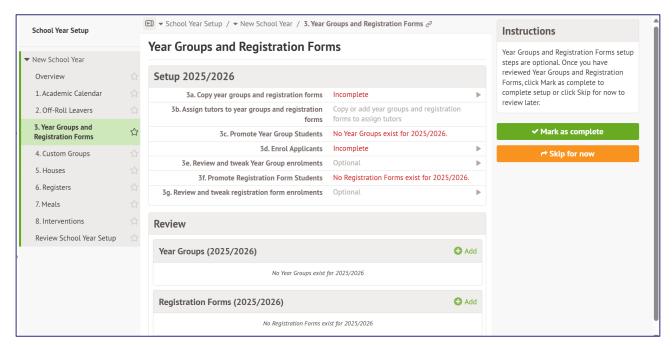
Go to **School > School Structure > School Year Setup** and click on step 3.



## Copy year groups and registration forms

Click on 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



**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.

Untick any year groups and registration forms you don't want to copy over, then 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.



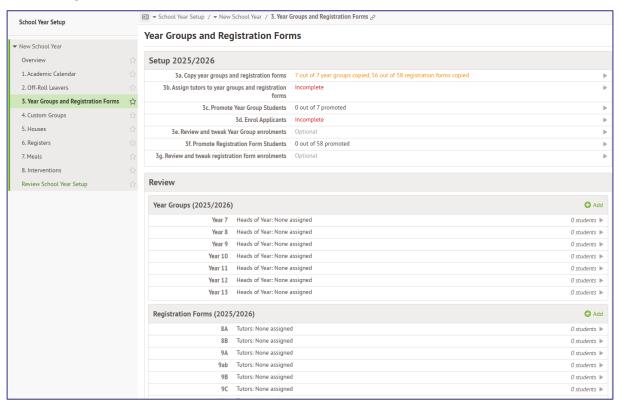
You can also choose whether to copy over registration forms not linked to a year group.



#### **Editing registration forms**

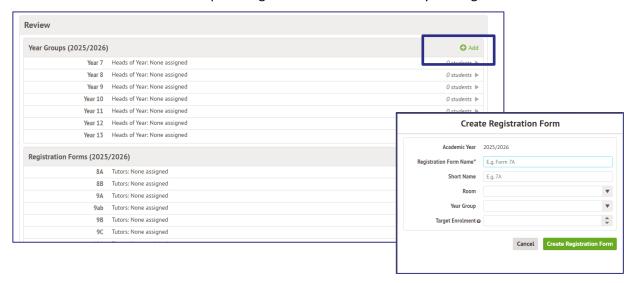
#### Click on a registration form to link to a year group.

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

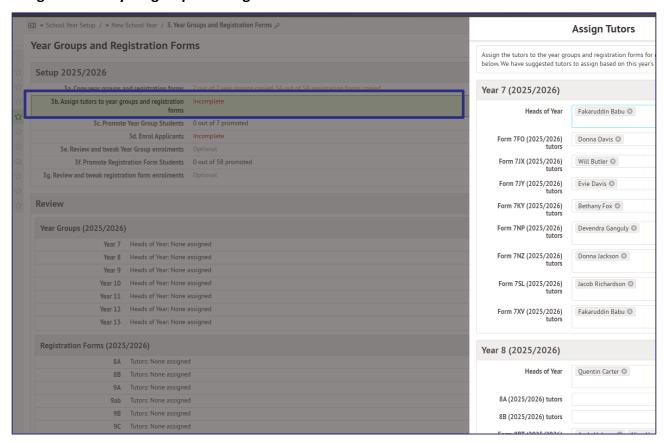


#### **Adding more Year Groups or Registration forms**

You can add additional Year Groups or Registration forms if needed by clicking +Add.



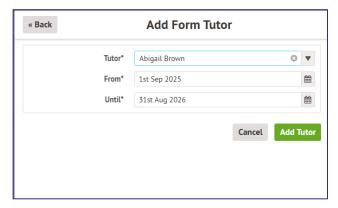
#### Assign tutors to year groups and registration forms



Click **Assign Tutors** field to produce the above slide over then 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.



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.



#### Add or edit form tutors

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

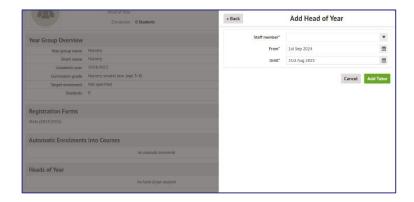


Please note: If you want to change teachers after you've already completed Step 6 of New School Year Setup, you'll need to also add the tutor to the registers using these instructions: Change teachers

#### Add or edit a head of year

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





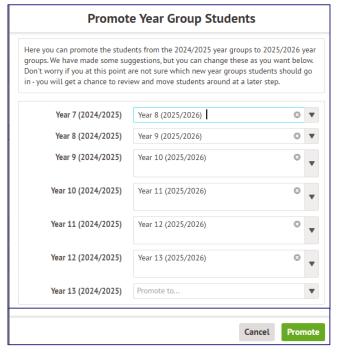
## **Promote year group students**

Click on **Promote Year group** Students by clicking this next field.



Choose which year groups to promote students into.

- If only some students are moving up, promote the whole year. You can then move the students who are remaining in nursery back in the 'tweak' step later.
- If you'll be splitting classes, promote the whole year. You can then move the students who will be in a different class in the 'tweak' step later.

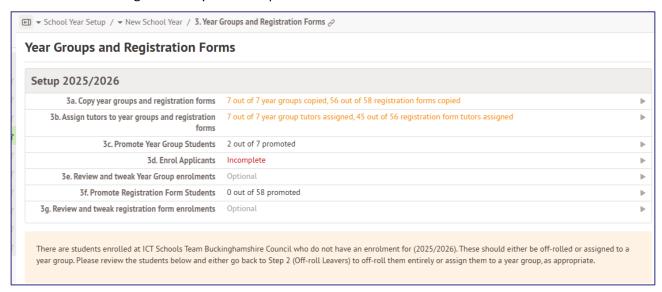


You can also see that your highest year group is not automatically promoted. You can leave that field blank, then click **Promote**.

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

Also note the warnings below if you do not promote all at once.

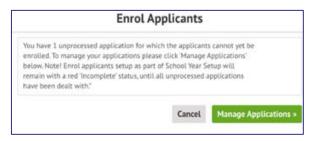


# **Enrol Applicants**



In this step, you'll be able to enrol your Applicants into Registration Forms and year groups, as you've now set them up. 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 **Enrol Applicants** option, you'll see the below message.



Click the Manage Applicants button and select the intake season.

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



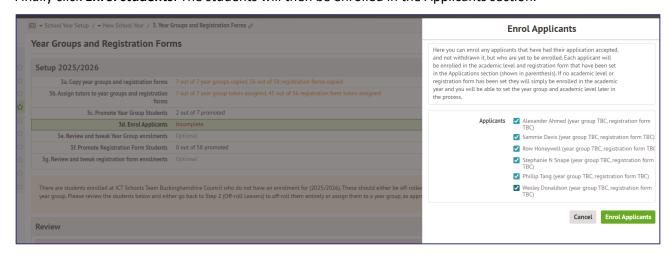
- 1. Tick the students who have accepted their offers.
- 2. Click the **Bulk action** button to assign them to a year group.
- 3. Repeat and assign them to a registration form.

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.

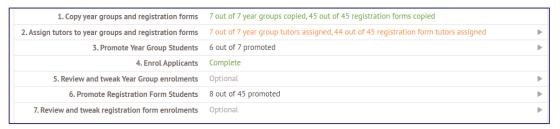
Arbor recommend checking that students have been assigned to the right year group before enrolling them. If they are not, you can repeat the Assign applicants to year group option to re-add them to the right year group.

 Bulk action ▲ Hide columns ▼ Make offers Date 1 Accept offers Reject applications 05 Ju Withdraw students 29 M Transfer Intake Season 29 M Assign applicants to intake bucket Assian applicants to intake group 30 No Assign applicants to year group Assign applicants to registration form 3 Assign applicants to house Enrol students

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



In the New School Year Setup, the **Enrol Applicants** section should also now be marked as complete.



If any remaining applicants have accepted a place but haven't yet been enrolled, click the **Enrol Applicants** option within Step 2 of the New School Year Setup 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.



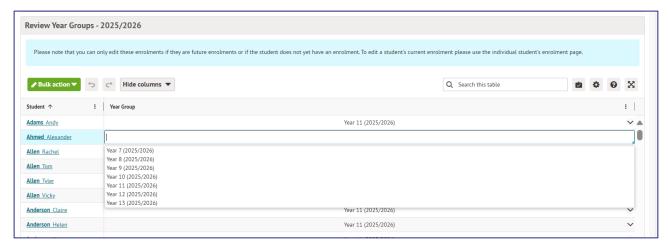
#### Review and tweak year group enrolments

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. Click on 3e. Review and tweak year group enrolments.



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.



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

# **Promote Registration Forms**

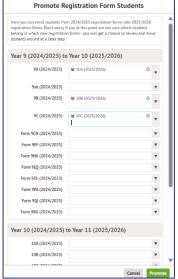
The next step is to promote students' Registration Forms from this year's registration forms into next year. Don't worry if at this point you are not sure which students belong in which new registration form - you can move students around later.

#### Click on 3f. Promote Registration Form Students



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.



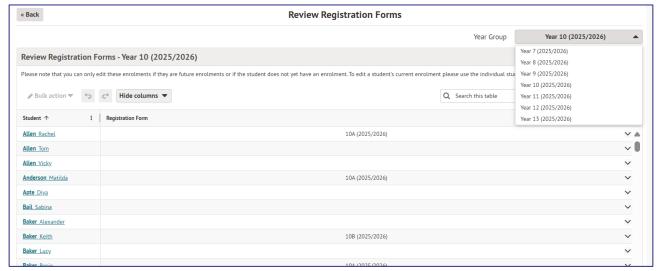
#### Review and tweak registration form enrolments

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.

Click on 3g. Review and tweak registration form enrolments.



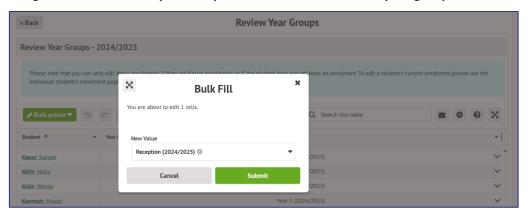
Click on the cell and a page will load for the first year group in your school. Select the year group you wish to make changes to by clicking on the top right-hand corner and selecting the year group from the drop-down.



You can either:

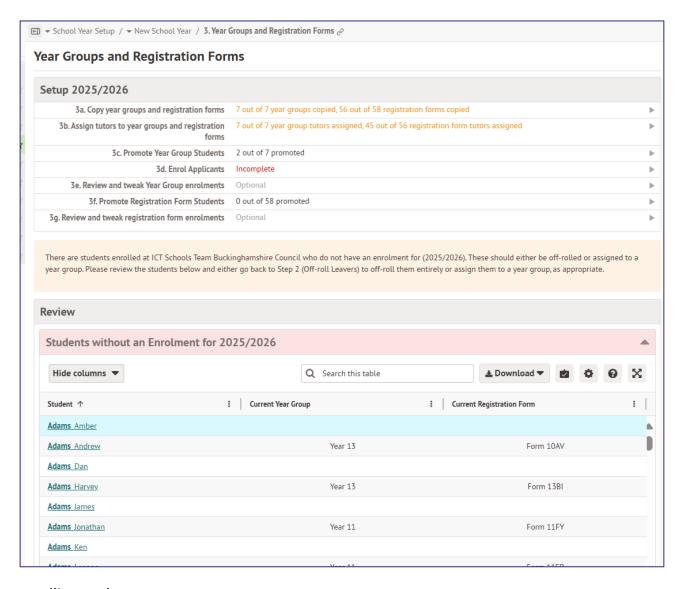
- Click on the cell containing the Registration Form information. A drop-down will appear offering the choices of Registration Groups for that year group. Select the group you wish to move them to.
- Select multiple rows and use the Bulk action button to change the student's registration form.

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

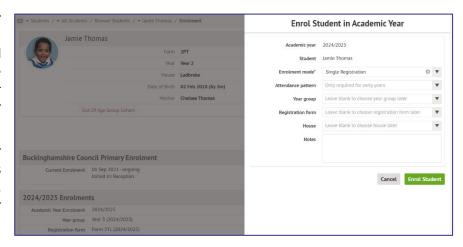
If you have any students who were not assigned a year group this academic year, they will not have been promoted to the next year group during Step 2. Instead, these students will appear in the **Review** section.



#### **Enrolling students**

If they will be attending your school next year, you will need to add them to a year group and registration form. Click the student's name to visit their profile and assign them to a year group and registration form.

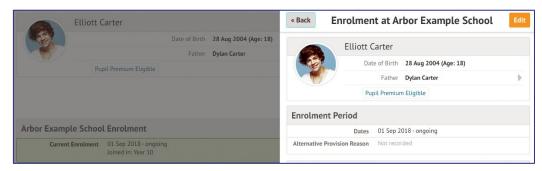
First, change the academic year to next year. In the Enrolments section for this year, click +Add to add their enrolment into the required year group etc.



#### **Removing students**

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.

Click their enrolment in your school. In the slide over, click the orange **Edit** button.

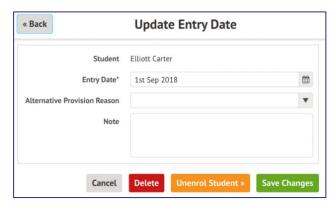


#### You can then:

- Un-enrol the student if they no longer attend by clicking Unenroll Student.
- Delete their enrolment completely by clicking Delete if the student never attended your school.

Whichever method is correct; to resolve your missed enrolments, the student should no longer appear in the Review section of your New School Year Setup Step 3. You should aim to remove all the students listed in this section.

**NOTE:** If you delete the student's enrolment and you added the student as an applicant, they will still be marked as **Enrolled** in the *Applicants* section. Only delete if the student was never expected to attend, otherwise you should follow the DfE guidance.

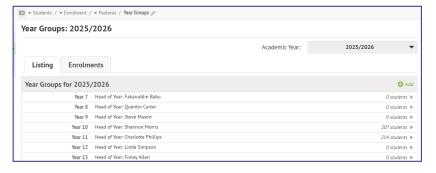




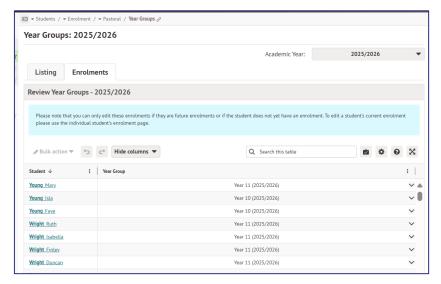
#### Make sure your students will be in the right year

To check that all your students have the correct year group for next year, go to **Students > Enrolment**. You will be taken to the Year Groups page. 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.



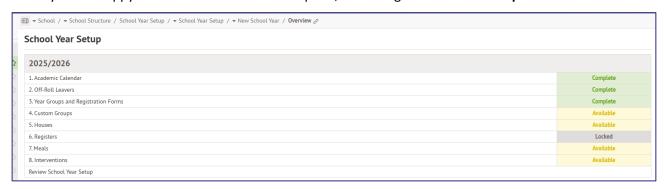
If you completed this step, you could check your enrolments are correct. You can click on the Enrolments tab to directly edit student enrolments.



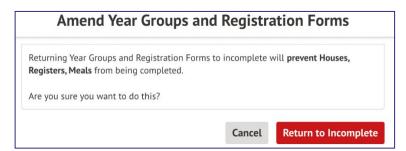
Return to School Year Set up and select 3. Year Group and Registration Forms

#### Mark as complete

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



If you wish to return to this step and make any changes, click the **Year Group and Registration Forms** on the School Year Setup and then click **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.

# **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

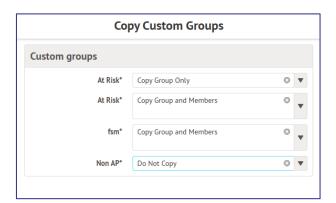
Go to School > School Structure > School Year Setup and select step 4. Custom Groups.



Click **1. Copy custom groups from 2024/2056** to copy them.

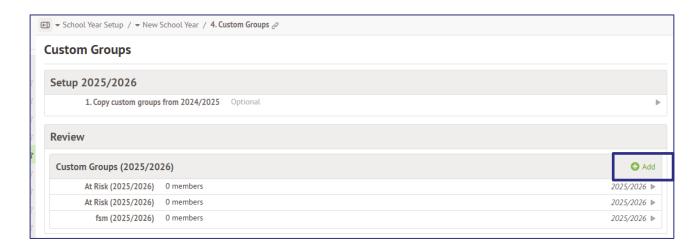
In the slide over, you can select:

- Copy Group only
- Copy Group and Members (includes the current students who are enrolled in the group.)
- Do Not Copy

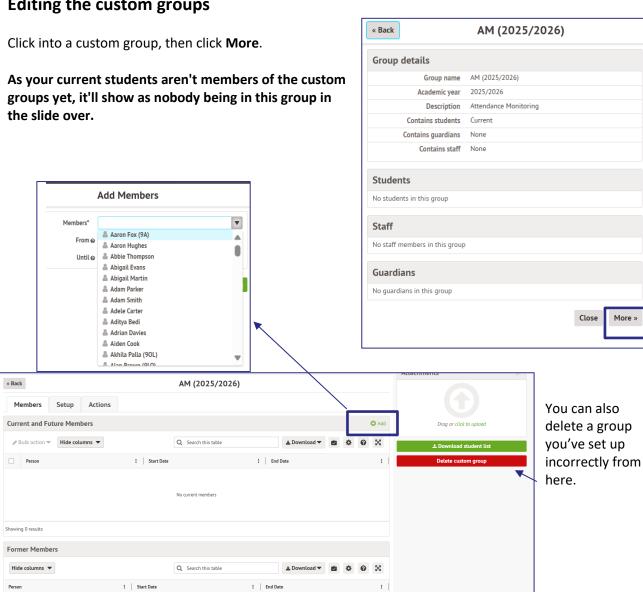


# Add new custom groups

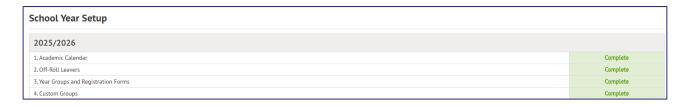
You can also set up entirely new custom groups as needed by clicking **+Add** in the **Review** section.



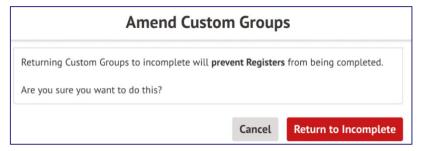
# **Editing the custom groups**



When you are happy that this section is now complete, 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.



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, then this section can be marked as complete by clicking the green 'Mark as Complete' icon.

## **Houses and Applicants**

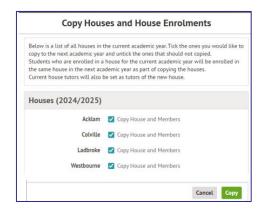
You may want to create your houses for the next academic year before you enrol your applicants, to allow you to assign them to the relevant groups quicker.

# Copy houses from this year to next year

Go to School > School Structure > School Year Setup and select step 5. Houses.



Click **1. Copy houses and house enrolments** to copy them. 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.



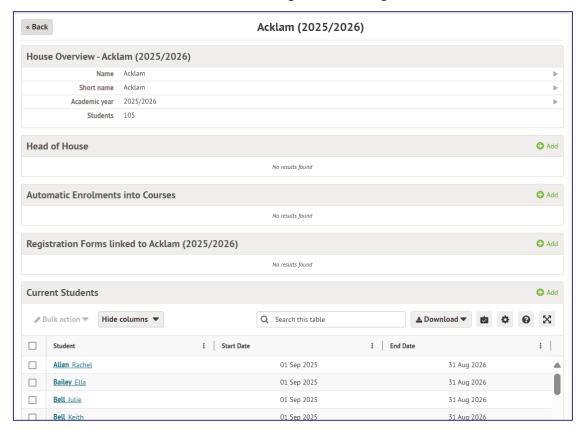
## Add new houses

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



# **Editing the houses**

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



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.

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**.



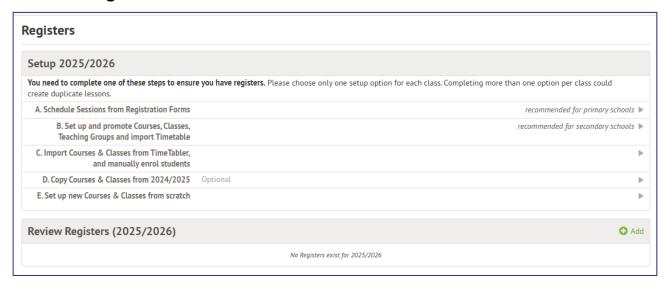
You must click the Mark as Complete button again to save your changes and enable you to continue editing the all the next sections.



# **Chapter 7** Registers

# For schools using Edval See Appendix A

Schools using TimeTabler or no timetable software read on...



If you use TimeTabler or no timetabling software, to set up your courses and classes you can choose between the following three options after completing Option A:

- B Setup and promote Courses, Classes, Teaching Groups and Timetable
- C Import Courses & Classes from TimeTabler, and manually enrol students
- D Set up new Courses & Classes from scratch

# **Option A. Schedule Sessions from Registration Forms**

#### Set up registration form registers

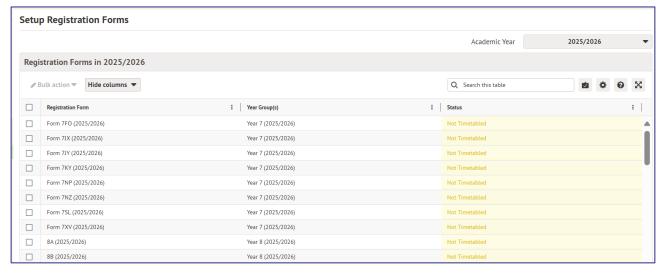
This step is the same no matter which option you're using. Arbor recommend scheduling your registration sessions in Arbor rather than in TimeTabler, so the Registration column on the <u>Teacher Hours</u> report can recognise these events correctly.

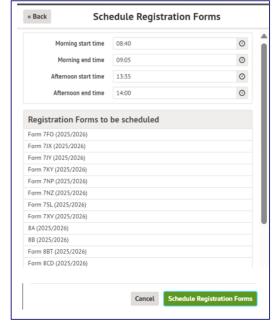
#### Select Option A.

#### Please note:

- If you have different registration times on different weeks, please see the *How do we schedule* different registration times for Week A and B on the Arbor Help Centre.
- If you don't have specific registration sessions to take attendance in, you can skip to the section for your specific setup option.

This will bring you to a list of all the registration forms you have. Select the registration forms, then click the Bulk action button to select Schedule Registration Forms.

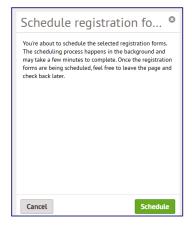




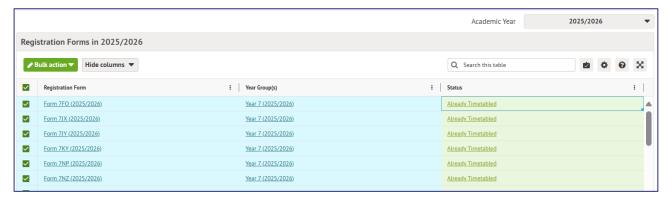
A slide over will appear where you enter the start and end times for the Registration Forms you have selected.

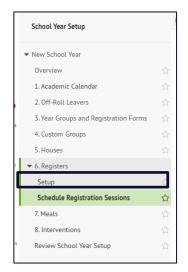
You might want to check what they are this year first.

Make sure your registration times overlap your  $\underline{\text{Roll Call}}$  times.

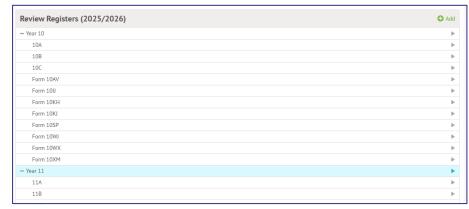


You can see that they've been timetabled. You can click into these to view more information.





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.



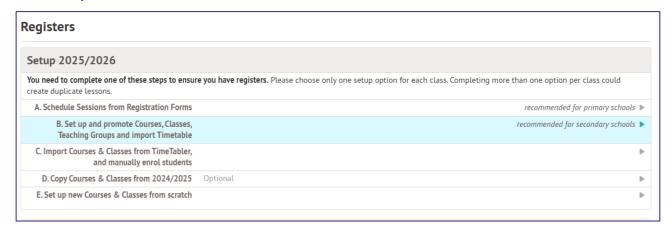
Timetabler schools should then use either Option B or Option C

# **Option B - Setup and promote Courses, Classes, Teaching Groups and Timetable**

Arbor recommend this option for schools that use teaching groups and have complex timetable requirements, large numbers of students or a large choice of courses.

Accessing the 8-step workflow

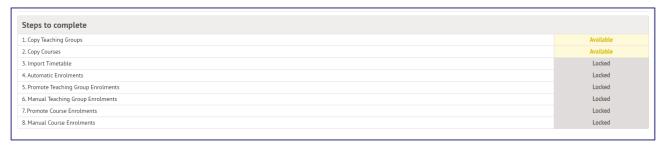
Click into option B.



You'll be taken to an 8-step workflow to copy classes over to next year. You will need to either:

- Complete steps 1 to 8 in order, to copy courses and classes from the previous academic year, then
  import your timetable, then promote your students this will copy the course structure from the
  previous academic year.
- Skip steps 1 and 2 and move straight to step 3 to import a brand-new timetable for that academic year - this will create a new course structure in Arbor from the information in the imported TimeTabler file.

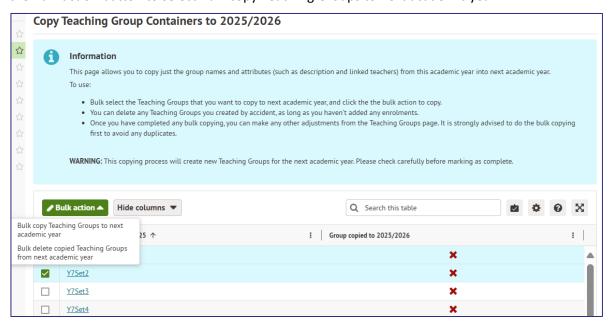
Arbor recommend the second option, although it takes longer to promote the students, any subsequent imports or changes you do will be quicker. You can then continue from step 4 to promote student enrolments from their classes this year into next year.



#### Step 1 (optional) - Copy Teaching Groups

This step allows you to copy just the group names and attributes (such as description and linked teachers) from this academic year into the next academic year. No students will be enrolled yet during this step - students will be promoted into your teaching groups in a later step.

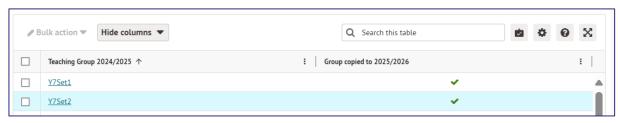
Tick the box next to all the teaching groups you want to copy over to the next academic year, then click the Bulk action button to select Bulk copy Teaching Groups to next academic year.



The following pop up appears:

The teaching groups you've copied over will then have a tick next to them. This means the group and the academic lead assigned will be copied over.





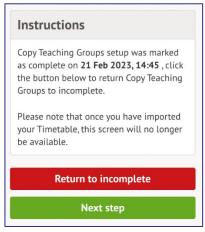
To delete any teaching groups from next year that you didn't want to copy over, tick the box next to all the teaching groups you want to not copy over to the next academic year, then click the Bulk action button to select Bulk delete copied Teaching Groups from next academic year.

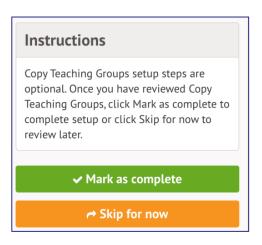
Please note, this will only work if you have not yet enrolled students into the teaching group. If you've already completed steps 5 or 6 to enrol students into the teaching group, you won't be able to delete the teaching group from here. You'd need to do this instead by clicking into the teaching group in step 6 and deleting it from there.



Once you have completed any bulk copying, mark this step as complete using the green button and move to the next step.

You can always make further changes to teaching groups by clicking into the Review section to get to the main <u>Teaching Groups</u> area, or by clicking Return to incomplete.



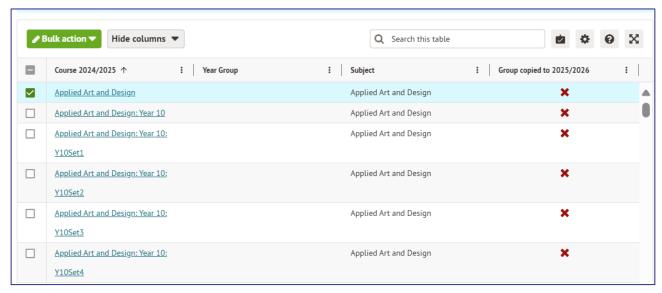




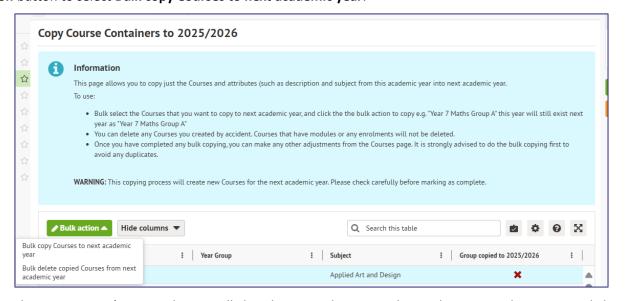
## Step 2 (optional) - Copy Courses

This step allows you to copy just the Courses and attributes (such as description and subject) from this academic year into the next academic year. No students will be enrolled yet during this step - students will be promoted into your courses in a later step.

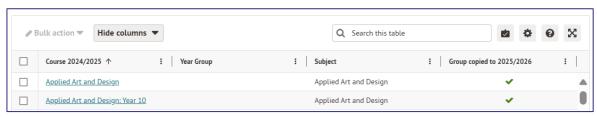
In this example, we're going to look at copying over this Applied Art and Design subject. Here you can see that Applied Art and Design is the top-level course, under that you have Year 10 and then within year 10, you have sets.



Tick the box next to all the courses you want to copy over to the next academic year, then click the **Bulk** action button to select **Bulk copy Courses to next academic year**.



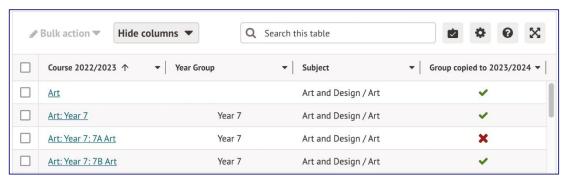
The courses you've copied over will then have a tick next to them. This means the group and the academic lead assigned will be copied over. Notice that copying over the bottom-level courses also copies the courses that these modules are a part of.



To delete any courses from next year that you didn't want to copy over, tick the box next to all the courses you want to not copy over to the next academic year, then click the **Bulk action** button to select **Bulk delete copied Courses from next academic year**.

Please note, this will only work if you have not yet enrolled students in the course. If you've already completed steps 5 or 6 to enrol students into the teaching group, you won't be able to delete the teaching group from here.

Note that if you only delete the bottom-level courses, the parent courses will remain. Be sure to delete all the courses from the structure that you don't want to copy over.



Once you have completed any bulk copying, mark this step as complete using the green button and move to the next step.

You can always make further changes to your class structure by clicking into the **Review** section to get to the main <u>Courses</u> area, or by clicking **Return to incomplete**.

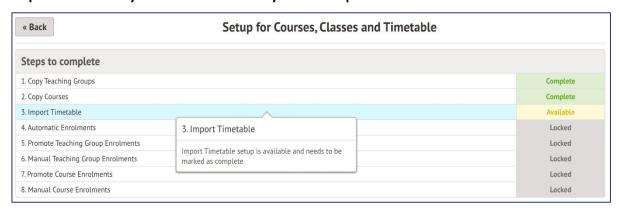


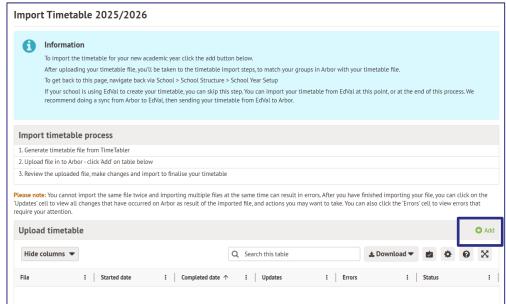
## Step 3 - Import Timetable

This step is for importing your timetable from TimeTabler.

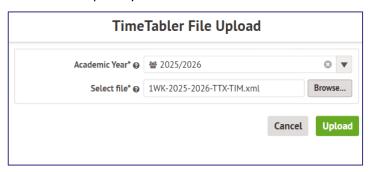
- If you don't use TimeTabler you'll need to timetable your sessions manually. You can mark this step as skipped, then look at how to do this below.
- To import from TimeTabler, click +Add to upload your file. Follow the instructions in the Importing
  your TimeTabler file section of this article to import your timetable: Importing a timetable from
  TimeTabler

Top Tip: Want to make everything run as fast as possible? Wait until you've completed all the other steps and schedule your timetable slots as your last step.

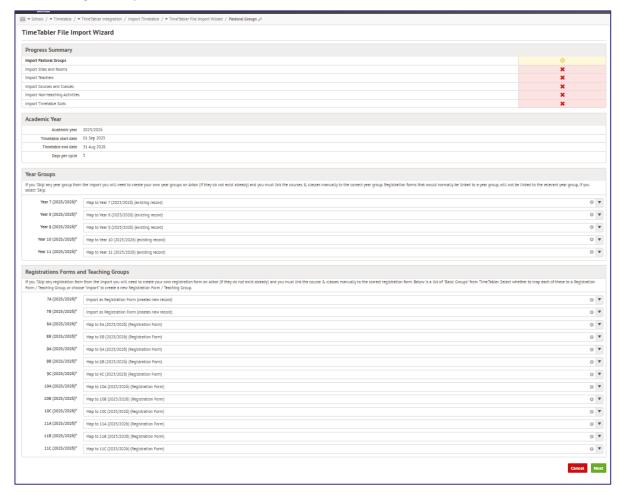




Click +Add to upload your timetable.



## Work through the Upload wizard:



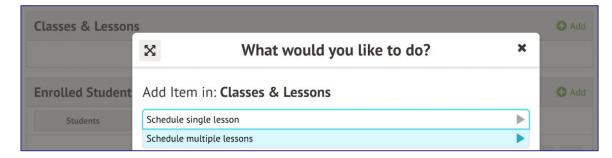
Note: You cannot import a timetable if you have not completed the Academic Calendar, copied teaching groups or copied courses.

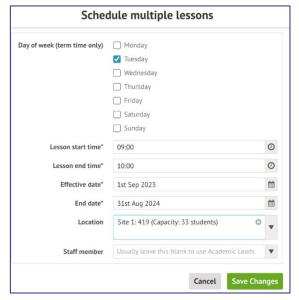


If you haven't imported a timetable from TimeTabler, your courses will show that they don't have lessons within **6. Registers** section of the main New School Year Setup.



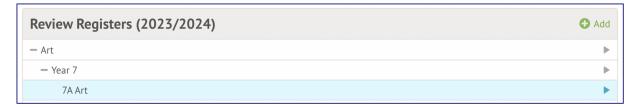
You'll need to click into each course and schedule lessons in the Classes & Lessons section.







Once you've added lesson slots for all your courses, they won't have any red text against them, and you've finished this step.



Click back into option B. You can then mark this step as complete using the green button and move to the next step.

You can always import a new file by clicking **Return to incomplete**.

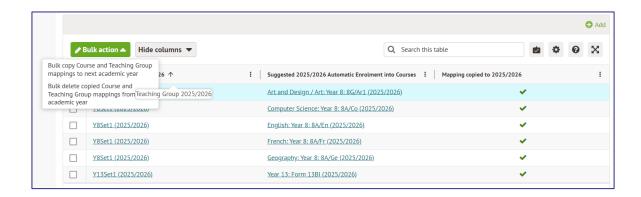




#### Step 4 – Automatic Enrolments

This step allows you to copy over the automatic enrolments that you had for Teaching Groups this academic year into the next academic year. The table will give you suggestions of the teaching group, and a class it thinks you would like to create an automatic enrolment into, so any student added to the teaching group can be automatically enrolled in the class.

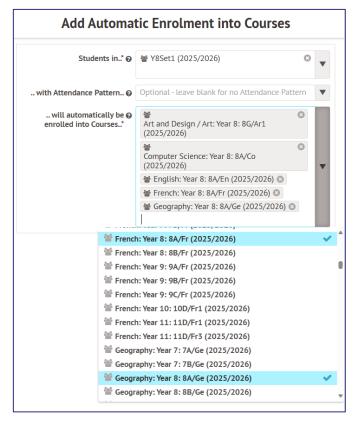
Tick the box next to all the automatic enrolments you want to set up, then click the **Bulk action** button to select **Bulk copy Course and Teaching Group mappings to the next academic year**.



The automatic enrolments you've set up will then have a tick next to them.

To remove any automatic enrolments set up in error, tick the box next to all the teaching groups you want to not copy over to the next academic year, then click the **Bulk action** button to select **Bulk delete copied Course and Teaching Group mappings from the next academic year**.

To add any more automatic enrolments for next year, just click +Add.



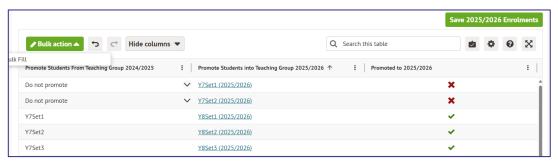
Once you have completed any bulk copying, mark this step as complete using the green button and move to the next step.

You can always make further changes by clicking Return to incomplete.

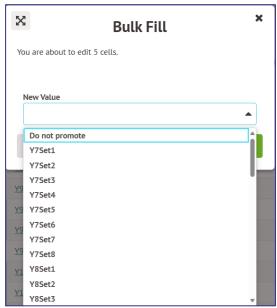
## Step 5 - Promote Teaching Group Enrolments

In the middle column, you'll see the teaching group you've copied over to next year. In the left-hand column, pick the Teaching Group from this year that you want to move into the teaching group for next year. For example, moving students from a Year 7 teaching group into the Year 8 teaching group for next year.

- If you don't see all the teaching groups you want to copy over, you can always return to one of the previous steps.
- Teaching groups for year 7 these will be set up in the next step.

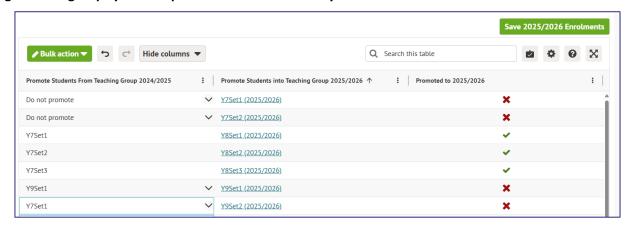


This can also be done in bulk (for example Year 7 where there are no previous groups to promote, select shift and click and then Bulk Action to get the Bulk Fill pop up.



Once you've chosen all the teaching groups, click the

green Save2025/2026 Ennrolments button. Be sure you are ready to save as you can't make any further changes to the groups you've copied over from here once you do.



This will then run in the background, so don't make any further changes. You can refresh your page to check if this is completed.

Once the teaching group enrolments have copied over, the table will show ticks next to these teaching groups.

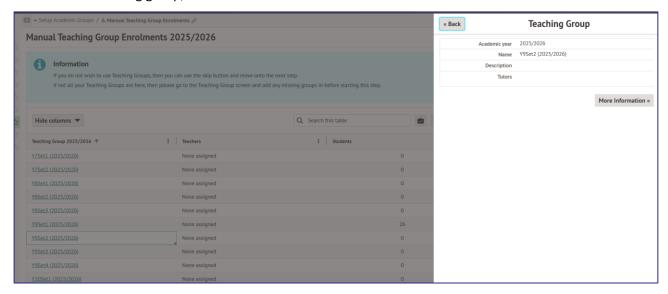


Once you have completed any bulk copying, mark this step as complete using the green button and move to the next step.

## **Step 6 – Manual Teaching Group Enrolments**

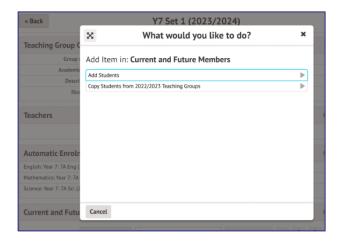
If you need to manually enrol students into teaching groups, you can use this step – for example adding Year 7 students into their teaching groups.

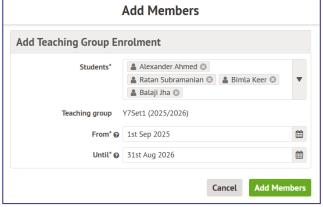
Just click the teaching group, then click the **More information** button.

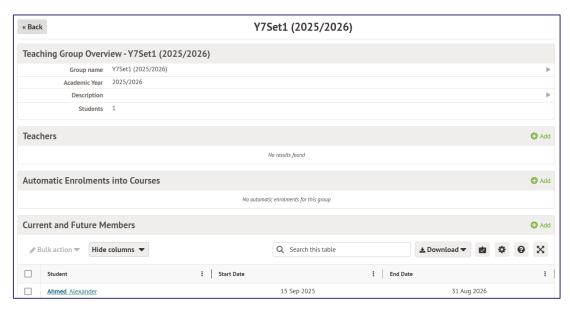


In the teaching group overview, click +Add in the Current and Future Members section.

Choose to add students, select the students then add them as members. Note that \*new\* pupils MUST be enrolled to show in the choice of students.







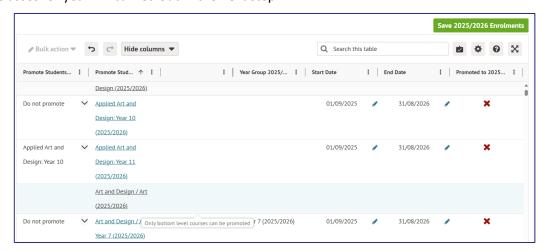
You can then return to *School Structure > School Year Setup > Step 6 > B. Setup Courses, Classes & Timetable > 6. Manual Teaching Group Enrolments* to mark this step as complete using the green button and move to the next step.

You can make further changes by clicking Return to incomplete.

#### Step 7 - Promote Course Enrolments

In the second column, you'll see the course you've copied over to next year. In the left-hand column, pick the bottom-level course from this year that you want to move into the course for next year. For example, moving students from a Year 10 art class into the Year 11 art class for next year.

- If you don't see all the courses you want to copy over, you can always return to step 2 and copy them over there.
- You may notice a link symbol in the middle column. This means there's an automatic enrolment set up into that class, meaning you might not need to promote students.
- Classes for year 7 carried out in the next step.

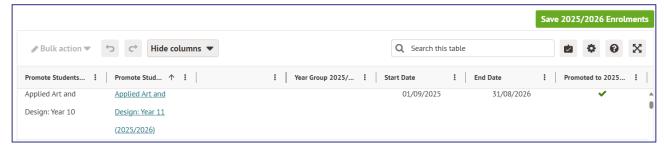


Once you've chosen all the classes, click the green Save button. Be sure you are ready to save as you can't make any further changes to the groups you've copied over from here once you do.

This will then run in the background, so don't make any further changes. You can refresh your page to check if this is completed.

Once the enrolments have copied over, the table will show ticks next to these classes.

1 This process will be run in the background, please check back later.

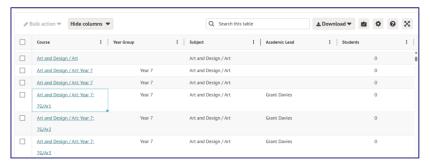


Once you have completed this, mark this step as complete using the green button and move to the next step. You can always make further changes by clicking **Return to incomplete**.

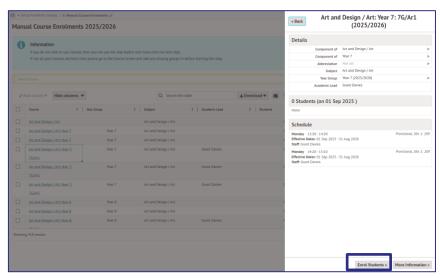
#### Step 8 - Manual Course Enrolments

If you haven't set up automatic enrolments during step 4 and want to enrol students into courses, you can either:

- import enrolments from TimeTabler's Options area following these instructions: <a href="Importing-options from TimeTabler">Importing Options from TimeTabler</a>
- use step 8 just click the course, then click the **Enrol Students** button.

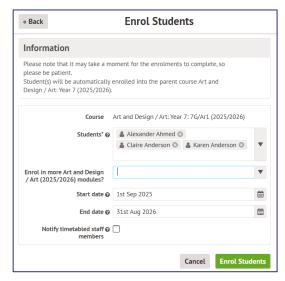


In the slide over, select the students then enrol them.

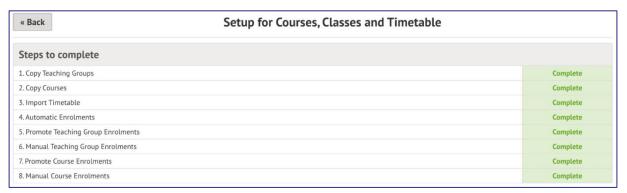


Once you have completed this, mark this step as complete using the green button and move to the next step.

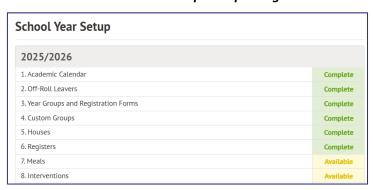
You can always make further changes by clicking **Return to** incomplete.



All your steps on the overview page should now be marked as complete (or skipped if you haven't imported a timetable from TimeTabler).



Return to School > School Structure > School Year Setup > Step 6 Registers and mark this as complete.



## Option C - Import from TimeTabler, and manually enrol students

Arbor recommend this option for schools with complex timetable requirements, large numbers of students or a large choice of courses, but who <u>don't want to copy over their teaching groups</u>. To be able to use this option, you must first have generated a timetable file in TimeTabler to be imported into Arbor.

## Importing your timetable

Click on **Option C** to be taken to the Import Timetable page.

Follow the instructions in the **Importing your TimeTabler file** section of this article to import your timetable: <u>Importing a timetable from TimeTabler on the Arbor Help Centre</u>

## **Enrolling your students**

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

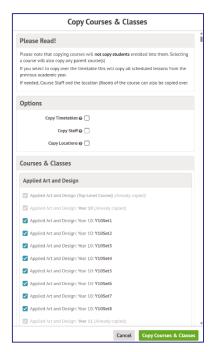
- You can import enrolments from TimeTabler's Options area following these instructions: <u>Importing</u>
   Options from TimeTabler on the Arbor Help Centre
- If you don't use Options, Arbor recommend using our bulk enrolment page by going to Students >
   Enrolment > Courses > Bulk Enrolment. Bulk enrol students into lesson registers

# Option D - Copy Courses & Classes from 2024/2025

Use this option if you wish to copy Courses and Classes from the previous year without importing a new (different) timetable. Please note that copying courses will **not copy students** enrolled into them. Selecting a course will also copy any parent course(s)

If you select to copy over the timetable this will copy all scheduled lessons from the previous academic year.

If needed, Course Staff and the location (Room) of the course can also be copied over.



# Option E - Schedule from Registration Forms, then add classes manually

Arbor recommend this option for schools that don't use TimeTabler and don't want to copy over teaching groups, or who don't use teaching groups at all.

## Setting up the classes

Once you've scheduled your registration sessions, you'll need to set up your other classes. Make sure you have these pieces of information ready:

- What you will call the class and the subject name
- What room the class will be in
- Which teachers will be assigned to the class
- When the classes take place

You will also need to have a plan for how you intend to structure your courses and classes. There are a variety of models that can be applied when setting up courses from scratch, the key is determining which one is suitable for your school structure before you start to add them. In the example below, we'll be following Arbor's Recommended Course Structure.

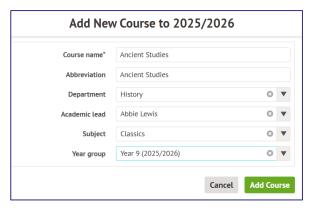
Choose **Option E** to Setup Courses & Classes from scratch.

A slide-over will appear where you need to enter information about the course/class you are setting up.

You can only select one year group per course you create. Leave the **Year group** field blank to be able to create sub-modules assigned to different year groups.

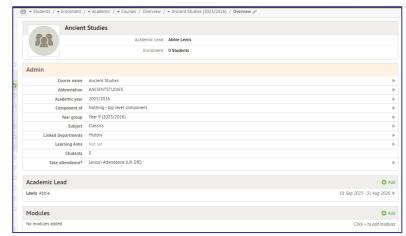
When all the details are correct, click on the green **Add Course** button.

This creates the course (the top-level component). The next step is to set up class groups if not all students will be in this lesson at the same time.

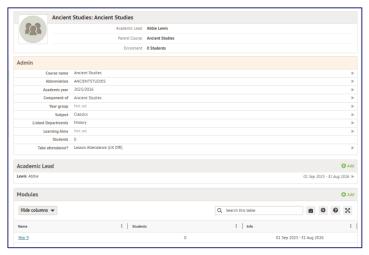


To do this, from the Course Overview, click **+Add** in the **Modules** section.

In the slide over add the name of the module and fill in the other details.

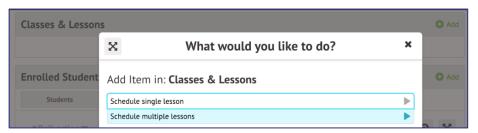


Add a module for each Year Group. Select the year group then click the green **Add Module** button.

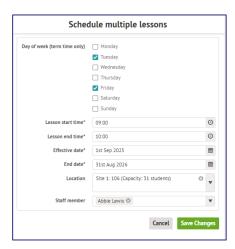


You will be taken to the module overview. To schedule lessons for this class, click **+Add** in the **Classes & Lessons** section.

You can then choose to schedule multiple regular lessons.



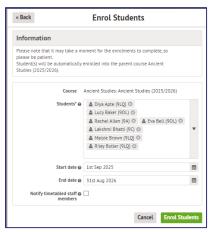
In the side over, select the days the lessons will run on, the time, effective dates, location, and the teacher. This ensures this person sees this lesson in their calendar.



#### **Enrolling your students**

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

You can also import enrolments from TimeTabler's Options area following these instructions: <u>Importing Options from TimeTabler</u>

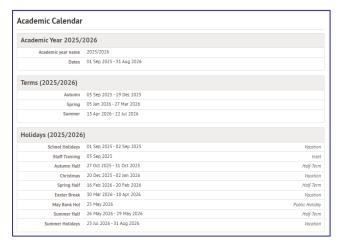


If you don't use Options or TimeTabler, Arbor recommend using our bulk enrolment page by going to **Students > Enrolment > Courses > Bulk Enrolment**. You can see how to enrol students into their registers from here following this guide: Bulk enrol students into lesson registers

## **Checking Registers for September**

If you don't have registers set up, your teachers won't be able to take attendance on your first day back! To check they've been set up, first take a look at when your registers should start. Go to **School** > **School** > **Structure** > **Academic Years**, then select the upcoming academic year.

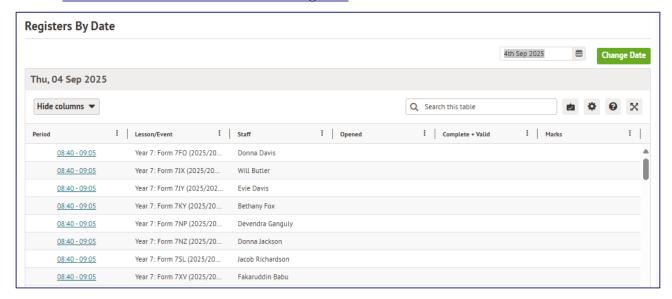
In the example, the 1<sup>st</sup> and 2<sup>nd</sup> September still form part of the school holidays and 3<sup>rd</sup> September is an INSET day therefore the first day that attendance should be taken is 4th September.



Next, go to **Students > Attendance > Registers By Date**. Click the calendar icon and select the first day your registers should exist for, then 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 you can see how to change this here: Editing timetable slots, lesson times, rooms and staff
- you haven't enrolled students in your Courses and Classes you can see how to do this here: <u>Bulk</u> enrol students to add them into lesson registers



When you are happy that this section is now complete, 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.

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

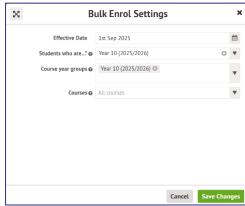
#### **Enrol Students into Classes**

The next step is to enrol your new students into their classes, so they will appear on the registers.

Arbor recommend using the bulk enrolment page by going to **Students > Enrolment > Academic > Courses > Bulk Enrolment**.

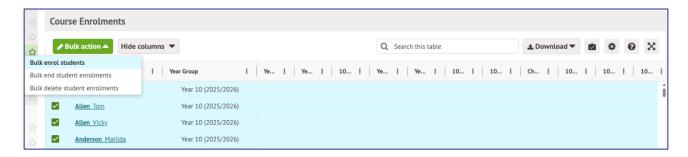
The page will default to show the lowest year group at your school, but you can click into the filters at the top of the page to change this.

- 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).

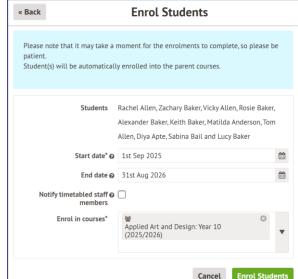


If you select to only show certain courses, these will display in the table.

Tick the boxes next to all the students who will be enrolled into the same classes. Click the **Bulk** action button and select **Bulk enrol students**.



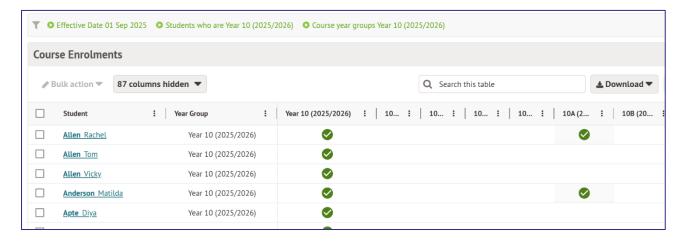
In the slide over, choose the dates they should be enrolled into these registers for, select the registers, and whether to notify the teachers of the new memberships, then click **Enrol students**.



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.





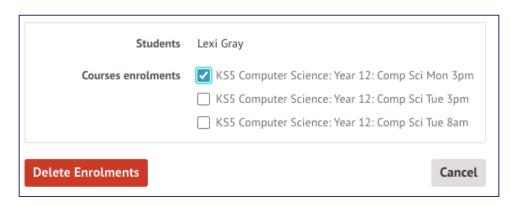
## **Deleting an enrolment**

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

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**.



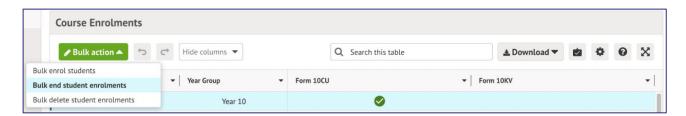
In the slide over, choose which registers to remove the enrolment into.



## **Changing enrolments**

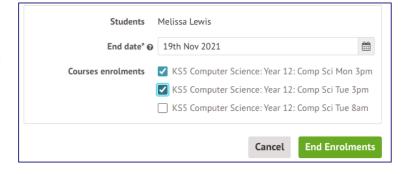
If a student is changing the sessions they are attending for, you can end their current enrolments and add new ones.

Tick the boxes next to all the students for who you want to change enrolments, then click the **Bulk** action button and select **Bulk end student enrolments**.



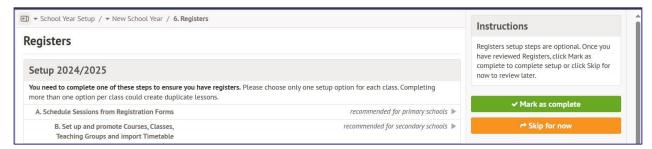
In the slide over, choose which registers to end the enrolment into.

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.



# Return to School / School Year Set up

When you are happy that this section is now complete, 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.

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 8** Meals

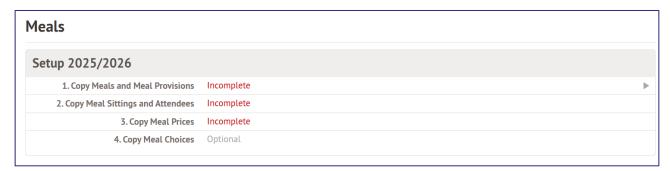
If your School is using Arbor Meals, please follow the below instructions. If not, you can 'mark as completed'

## **Meals and Meal Provisions**

Go to School > School Structure > School Year Setup and select step 7. Meals.

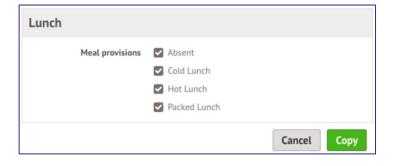
#### **School Year Setup**





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. 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.

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.



## Adding new provisions

You can set up meals from this page, 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, shown here: <u>Setting Up Meals</u>



#### **Copy Meal Sittings and Attendees**

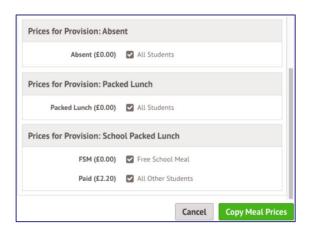
Click on step 2. Tick the meal sittings and attendees you would like to copy and untick the ones that should not be copied. If you do not copy the sitting timetable or at least one sitting attendee group, the sitting itself will not be copied.

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



## **Copy Meal Prices**

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**

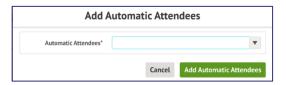
Step 4 is optional and will depend on whether you want meal registers to be pre-filled with student's regular meal choices. If you do, click **Copy Meal Choices**.

#### 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:

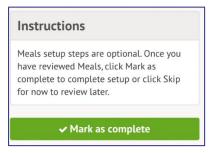
- 1. go to **School > Meals > Setup**.
- 2. Select the next academic year from the drop-down menu.
- 3. Click into **Attendees** and go to the **Automatic Group Attendees** tab.
- 4. Click **+Add** to add students.
- 5. Select all the registration forms to add to the meal, then click **Add Automatic 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.





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.

# **Chapter 9** Interventions

If your School uses Arbor Interventions, please follow the below

# **Copy Interventions**

Go to School > School Structure > School Year Setup and select step 8. Interventions.



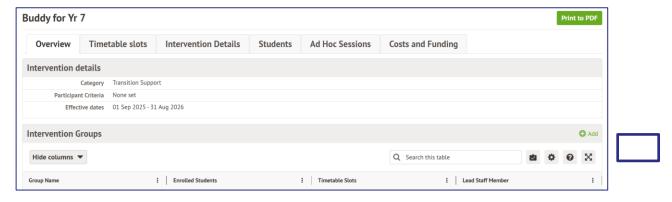
Tick the interventions you would like to copy over to next year, and then click **Copy Interventions**.



## **Editing the intervention**

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.



When you are happy that this section is now complete, 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, or click **Make further changes to interventions**.

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 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

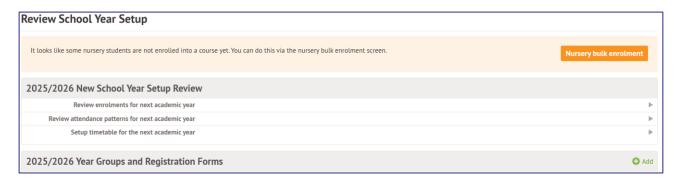


# **Reviewing your setup**

Click on the last step to review your setup.

## **Manage enrolments**

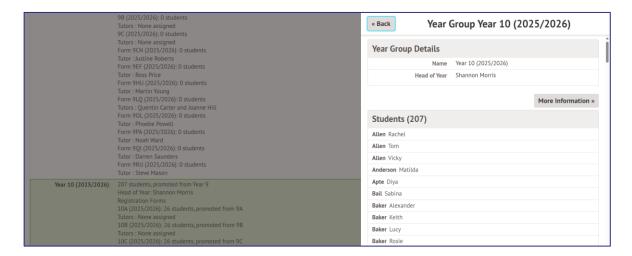
- Review enrolments for next academic year move students into different Year Groups, Registration Forms or Houses.
- Review attendance patterns for next academic year if you've set up Nursery registers to use attendance patterns, you can manage attendance patterns from here.



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

Year 10 (2025/2026) 207 students, promoted from Year 9
Head of Year: Shannon Morris
Registration Forms
10A (2025/2026): 26 students, promoted from 9A
Tutors: None assigned
10B (2025/2026): 26 students, promoted from 9B
Tutors: None assigned
10C (2025/2026): 26 students, promoted from 9C
Tutors: None assigned

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**

- 1. Are your Academic Calendar term dates correct?
- 2. Have you recorded when your leavers will leave?
- 3. Will your students be in the right groups?
- 4. Have you scheduled your registers?
- 5. 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. Be sure to follow the instructions in our 5 ways article to resolve this and remove the banner.



#### **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 (i.e. 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: <a href="School Shop">School Shop</a>

#### **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: <u>Set up Shared Teaching courses for the next academic year</u>

# **Chapter 11 The New Academic Year 25 – 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**. Click the calendar icon and select the first day your registers should exist for, then click **Change Date**.

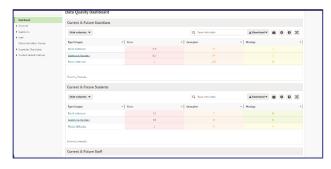
If you've set up your registrations correctly, they should appear on this page! If they don't, and you're sure you haven't scheduled a holiday on this day, this means either:

- 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

# **Data Quality Checking**

Data Quality Dashboard allows you to check and update key elements of student, guardian and staff data. Just go to **School > Data > Data Quality Dashboard**.

First, you'll see an overview of how many data points we recommend you check.

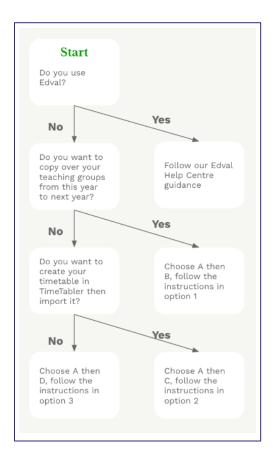


Use the left-hand menu to select the data you want to check - you can choose to work on Students, Guardians or Staff

# **Appendix A Schools Using Edval**

# Steps to take Prior to an Edval Import

If you are importing you timetable via Edval, Arbor recommend taking the following steps to ensure the smoothest possible experience.



### Step 1 - Prepare your timetable in Arbor

#### Importing a timetable for the next Academic Year

Copy your courses over to the new year using Arbor's New School Year Setup

The timetable import relies on courses from Arbor being matched to courses in Edval, so Arbor strongly recommend copying over your existing courses to the next academic year, as you'll then be able to match them up within Edval.

You can copy your courses over by taking the following steps:

- 1. Head to School > School Structure > School Year Setup.
- 2. Select Step 6.
- 3. Choose option B: Setup and promote Courses, Classes, Teaching Groups and Timetable.
- 4. Select step 2: Copy Course Containers.

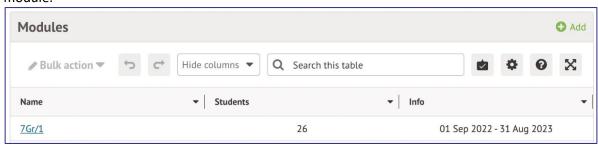
- 5. Within step 2, tick the courses you'd like to copy over to the new academic year, then use the bulk actions to bulk copy these over. For convenience, we'd recommend selecting all courses by ticking the checkbox in the top-left of the table, then running through the list and unticking any courses you don't want to copy over.
- 6. Once you have copied your courses over to the next academic year, you'll then be ready to import your Arbor courses into Edval this step ensures that the timetable in Edval is written in against the appropriate courses in Arbor.

#### Create courses in Arbor for any new courses set up on Edval

If new courses are being timetabled in Edval which aren't part of your current course structure on Arbor yet, you'll need to create these courses in Arbor before importing. This process isn't essential but will reduce the amount of manual work required after syncing your timetable into Arbor.

- Head to School > Programmes and choose (next academic year) Courses.
- 2. Click the + icon next to the top-level course under which you need to add a new course for example, KS3 German.
- First click the +
  icon next to the appropriate top level course.

  + KS3 English + KS3 French + KS3 Geography KS3 German + Year 7 + Year 8 + Year 9 + KS3 History + KS3 Mathematics
- 3. Once the underlying Year Group courses are shown, click into the Year Group that you need add a course to for example, Year 7.
- 4. When viewing the course, click the +Add button next to Modules to create a new submodule.



- 5. On the Add New Module slide over, set the class name as the Module Name other details such as
  - the Subject and Year Group should be set automatically. Click Add Module to create the new course.
- 6. Once you've added the course, you can head back to School > Programmes > (next academic year) Courses and repeat the above steps for any new courses.



#### Make sure students are enrolled in your classes

When importing your timetable, Arbor won't automatically enrol students into classes and registers.

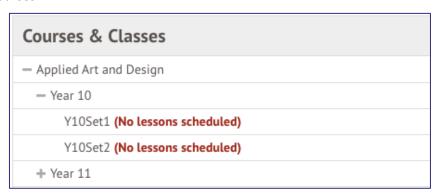
Because you create your course structure in Arbor prior to importing your timetable from Edval, Arbor also recommend enrolling students in your classes before importing from Edval.

You can use our bulk enrolment page by going to Students > Enrolment > Courses > Bulk Enrolment. You can see how to enrol students into their registers by following this guide: Bulk enrol students into lesson registers

## Step 2 - Check the timetable slots

This step is important if you have ended or deleted any timetable slots because you will be replacing them with a new timetable next term or year.

Once the timetable slots have been deleted, wait at least 30 minutes. This is so all lessons in the background will have been deleted. Check there are no lessons scheduled for a few example courses from School > Programmes > Courses.



# Importing your new timetable

Contact Edval's support team for instructions on how to sync your timetable to Arbor.

Once your timetable has been imported, please follow these instructions where required:

# Steps to take after an Edval import

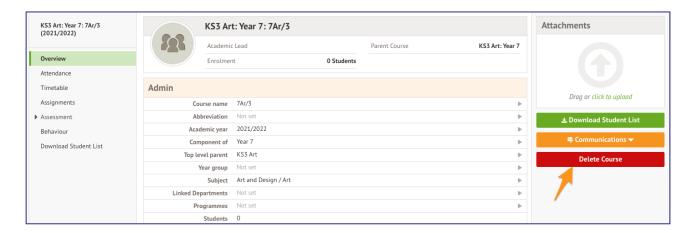
#### **Set Academic Leads**

Edval's current importer cannot set Academic Leads for courses in Arbor. To input your Academic Leads for courses in bulk, you can either:

copy them from the timetable slot staff you already have: <u>Copy Academic Leads from timetable slot staff</u> manually set them in bulk: <u>Bulk updating Academic Leads or Form Tutors</u>

#### Delete any no longer required courses

If you have copied your course structure over from the previous Academic Year, you may have some courses that are no longer being run and require removing. You can delete these by clicking into the course, and clicking the red **Delete** button on the right-hand side of the page.



## **Check student enrolments**

When importing your timetable, Arbor won't automatically enrol students into classes and registers.

**Arbor End of Year Procedures**