



**Buckinghamshire
Council**

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Data Cleansing and GDPR Housekeeping Routines in SIMS

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Where appropriate for data entry purposes, the graphics used in this document match the training data recommended for use on the course. Where the graphic is an example of what might be expected when using certain areas of the software, the training data may not be an exact match.

This booklet is designed for use with SIMS software version **7.214** and above



Data Cleansing and GDPR Housekeeping Routines in SIMS

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Introduction

SIMS Data Cleansing and GDPR Housekeeping routines should be an ongoing process. It is a good idea to check your SIMS database after major changes, such as a new intake at the beginning of term or at the end of the year. By regularly running these routines, it should not become such a time consuming activity.

The latest Data Cleansing reports are available to download from SchoolsWeb and these will be updated as appropriate. The reports are created in Excel to assist with easy filtering.

<https://schoolsweb.buckscc.gov.uk/ict-zone/schools-mis-team/sims-downloads/>

There is a checklist of reports and data cleansing routines in **Chapter 5**. This is a useful guide to work through to ensure all the data cleansing and housekeeping routines are followed.

Key Problem Areas

Parental Responsibility

This explores contacts incorrectly identified as having parental responsibility and parents who should have parental responsibility who do not.

Duplicate Contacts

Looking for students who have too many contacts with parental responsibility indicating a possible duplication of contact details or mis-application of the parental responsibility flag.

Duplicate Addresses

Looking primarily for “missing houses” and broken sibling links.

Duplicate Personnel Records

Looking for duplicate staff records.

SIMS Permissions

To run some of the reports and routines, relevant SIMS permissions are required. Please discuss with the school’s Systems Manager if there are any issues.

Record Management in Schools

School’s data should be regularly checked and maintained to ensure they are compliant with current GDPR regulations.

The **Information Management Toolkit for Schools**, published by the Information and Records Management Society (IRMS), has been created to assist schools to manage their information in line with the current legislative frameworks <https://irms.org.uk/page/schoolstoolkit> . Refer to **Chapters 7, 8 and 9**.

Chapter 1 Getting Started

Introduction

Before starting the process of Data Cleansing and Housekeeping, please read the guidance notes and work through them.

Back Up

Check with your IT Manager that a backup was run overnight.

Data Cleansing Reports

Check whether the Data Cleansing reports have already been imported into SIMS.

Reports | Run. Under **+ Focus** – select **Student**.

Check if they are already there - all reports start with **DC...**

Focus	Name	Focus	Owner
Student	DC - Duplicate School history	Student	Imported
Staff	DC - Reason for Leaving	Student	Imported
Class	DC - School history	Student	Imported
Aspect	DC - Student adds to validate	Student	Imported
Contact	DC01 - Missing Contacts	Student	Imported
Group	DC04 - Too many contacts	Student	Imported
Category	DC07 - Missing Addresses	Student	Imported
Template	DC08 - Sibling address different	Student	Imported
Gradeset	DC09 - Mailing Point/Sibling link check	Student	Imported
Resultset	DC11 - Student Behaviour	Student	Imported
OMR Template	DC12 - Achievements Report	Student	Imported
Result			

Import Data Cleansing Reports

These are available to download from:

<https://schoolsweb.buckscc.gov.uk/ict-zone/schools-mis-team/sims-downloads/>

To download and import the reports – refer to Chapter 2

Create a New Data Cleansing Folder

Create a new folder for the reports on: **S:| SIMS | Data Cleansing**

Run the Data Cleansing Reports

Run the reports in the order identified.

Using the Checklist

Use the checklist on **Chapter 4** to keep a running tally of where you are.

Once data has been corrected, move onto the next report.

Save each report into the Data Cleansing Folder for an easy reference point.

Rerun reports once SIMS has been updated. There may be some anomalies as you work through the data.

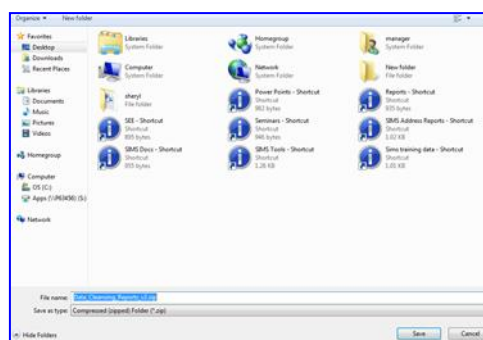
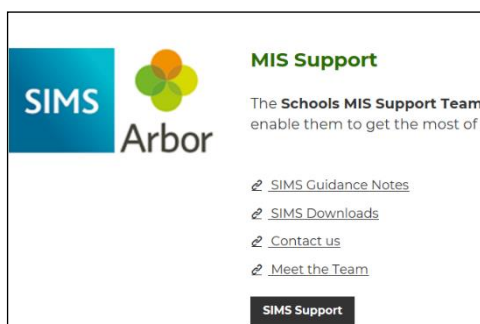
Chapter 2 Importing and Running the Data Cleansing Reports in SIMS

Downloading the Reports

Download reports (**Data Cleansing Reports V3.zip**) from:

<https://schoolsweb.buckscc.gov.uk/ict-zone/schools-mis-team/sims-downloads/>

Save the file to a destination on your computer ie. My Documents or the Desktop

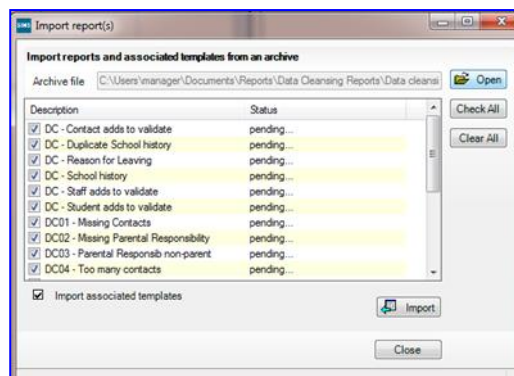


Extracting Reports - Zipped file

- Right click on the file
- Click on 'Extract All' (either located on the side or top of the window)
- Follow the wizard and save the folder

Importing the Reports into SIMS

- In SIMS, select Reports | Import
- Navigate to where the Report file was saved
- Select **Open**
- Highlight the Report and Select Import
(this may need to be repeated several times where several Report files need Importing)
- Click Close when all Reports have been imported.



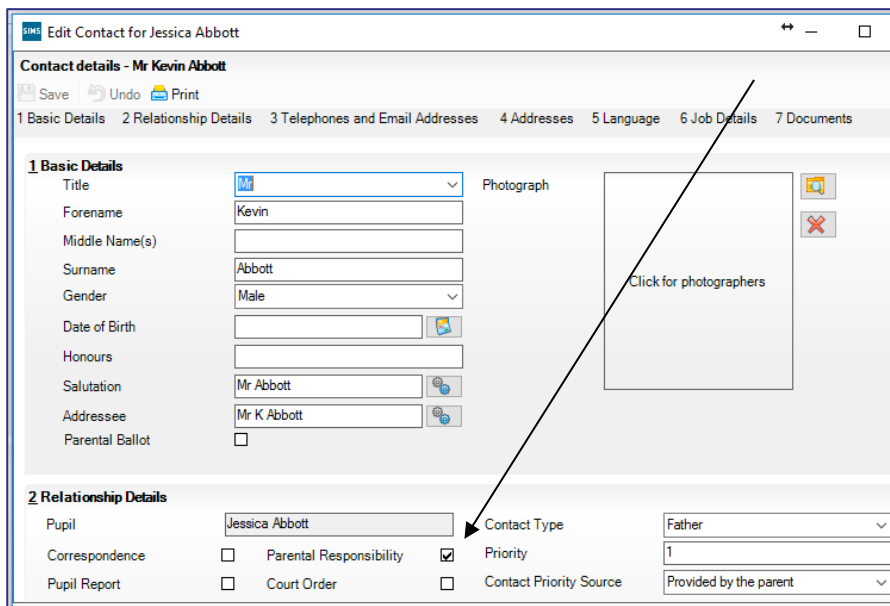
Running the Report from SIMS

- Select Reports | Run
- Expand Focus
- Select required folder (Staff, Contacts or Student etc.)
- Run Report

Chapter 3 Key Problem Areas

Why Parental Responsibility is Important

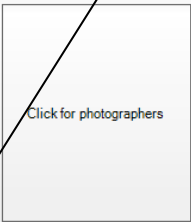
The parental responsibility flag held against each contact is the key to family links and the  'house' icon on Contacts and reporting ability for Parental Responsibility. Only those individuals who have parental responsibility must be 'ticked'.



Contact details - Mr Kevin Abbott

1 Basic Details 2 Relationship Details 3 Telephones and Email Addresses 4 Addresses 5 Language 6 Job Details 7 Documents

1 Basic Details

Title: Photograph: 

Forename:

Middle Name(s):

Surname:

Gender:

Date of Birth:

Honours:

Salutation:

Addressee:

Parental Ballot: ☐

2 Relationship Details

Pupil:

Correspondence: ☐ Parental Responsibility: ☒ Priority:

Pupil Report: ☐ Court Order: ☐ Contact Priority Source:

It is paramount that this flag is correctly set, otherwise:

- Missing houses on contact / Family Link
- Family links won't populate correctly
- Incorrect reporting

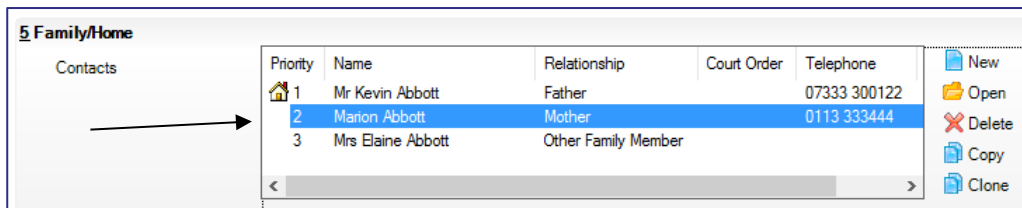
Problems Created by Duplicate Contacts

Over time duplicate contacts have been created on the SIMS databases. This reduces the effectiveness of the system and makes administration more burdensome. Specifically it causes a number of problems:

- Sibling links may not be created correctly by the system.
- If using mail merge then duplicate letters may be created.
- When updating contact details, these may be updated on one record only, leaving a data mis-match.

Address Problems

One of the most troublesome problems on SIMS is duplicate addresses. These can usually be identified by "missing houses" against the parent contact record held on the student.



5 Family/Home

Contacts

Priority	Name	Relationship	Court Order	Telephone
1	Mr Kevin Abbott	Father		07333 300122
2	Marion Abbott	Mother		0113 333444
3	Mrs Elaine Abbott	Other Family Member		

Actions: New, Open, Delete, Copy, Clone



In the example, it can be seen that Mr Abbott has a 🏠 symbol against his details, whereas the mother does not. Here the system is indicating that the father is living at the same address as the pupil whereas the mother is not. This **may** be correct. However, in some instances this will be incorrect and will need to be changed.

It is important that the correct address is associated with all members of the same family living at the same address. Failure to do this can cause the following problems:

- The addresses may show slightly differently on each contact and may be wrong. If updated then they may not necessarily be corrected on all records.
- Mailing point and sibling links may not work correctly causing duplicate letters to be produced for the same address.
- If the family move house, some of the family may be left behind on the duplicate address. This may not be picked up when the record is updated.
- Address information is stored at County in the ONE system and this can cause anomalies.

Personnel Record Problems

It is not unusual for more than one personnel record to exist on SIMS for a member of staff. This causes the following problems with the SIMS system:

- Staff can be incorrectly counted on the School Workforce return.
- Staff can be incorrectly assigned to the pastoral structure at end of year. This will ripple through the system in the next academic year and will affect attendance registers, reporting, assessment, timetabling etc.

NOTE:

Access to Personnel records will be subject to relevant permissions.

Any work on Personnel must be undertaken in conjunction with the school Bursar, or the person who is responsible for staff records and contracts.

Special consideration **MUST** be given to the changes made, if FMS is used within your school.

Chapter 4 Data Cleansing Reports & Checklist

Data Cleansing Reports	Report Focus	Checks For?	Numbers reported
DC01 – Missing Contacts	Student	No Parental Responsibility	
DC02 – Missing Parental Responsibility	Contacts	No Parental Responsibility	
DC03 – Parental Responsibility Non-Parents	Contacts	Parental Responsibility Incorrect?	
DC04 – Too Many Contacts	Student	Parental Responsibility Incorrect?	
DC05 – Duplicate Contacts	Contacts	Duplicate Contacts	
DC06 – Address Disclosure	Contacts	Other	
DC07 – Missing Addresses	Student	Parental Responsibility	
DC08 – Sibling Address Different	Student	Duplicate Addresses	
DC09 – Mailing Point/Sibling Links Check	Student	Duplicate Contacts and/or Addresses	
DC10 – Parental Responsibility List	Contacts	Parental Responsibility	
Other Useful Reports:			
DC – Duplicate School History	Student	School History	
DC – Reason for Leaving	Student	Reason for Leaving	
DC – Student Address to Validate	Student	Student Addresses not Validated	
DC – Contacts Address to Validate	Contacts	Contacts Addresses not Validated	
DC11 – Student Behaviour List	Student	Behaviour Details	
DC12 – Achievements Report	Student	Achievements	
Staff Reports:			
DC – Missing Scale/Range End Date	Staff	Check for Missing End Dates	
DC13 – Duplicate Personnel Records	Staff	Duplicate Personnel records	
DC – Staff Address to Validate	Staff	Staff Addresses not Validated	

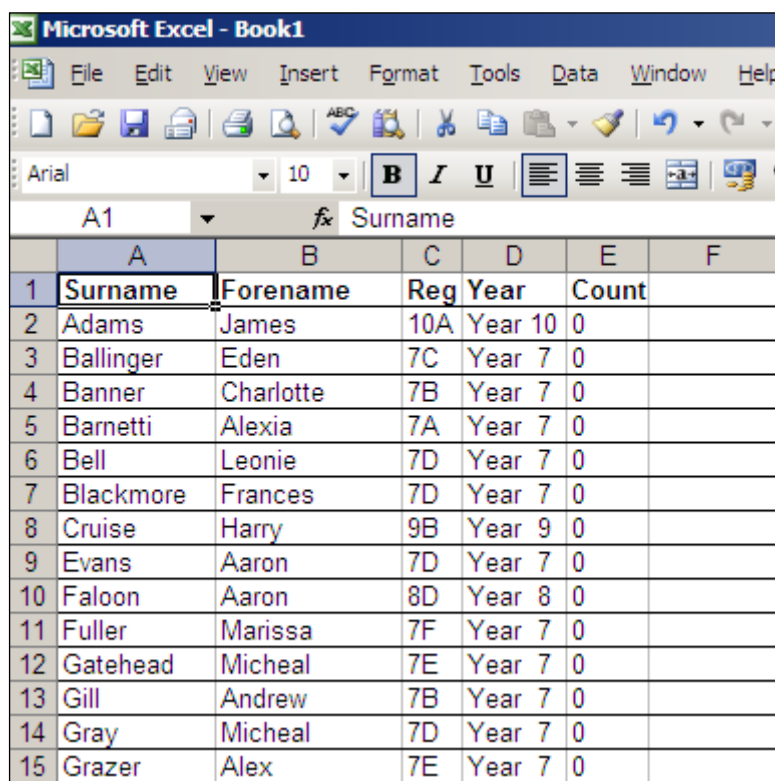


Maintaining SIMS Data Checklist	
<u>Check/Run:</u>	<u>Actioned:</u>
Tidy and Merge Addresses	
Unmatchable Address Report	
Resolve Duplicate Addresses	
Setup Addressee Format	
Update Parental Salutation Update Parental Addressee	
Housekeeping General: Name Format Reset Parental Ballot Flags Update Mailing Point	
Merge Agencies	
Run: Tools Validate Memberships Tools System Diagnostics Database Diagnostics	
Admission Records: Tidying admission records and groups Bulk delete application data	
Web Address Validation (WAV)	
GDPR Housekeeping Routines: Delete Unlinked Contacts Delete Unlinked Persons Delete Pupil/Student Permanently delete pupil/student data Protect pupil/student bulk deletion process Bulk delete pupil/student data Document Management Server GDPR Requests	
Delete Staff Records	

Chapter 5 Running Data Cleansing Reports

DC01 – Missing Contacts

Report Focus Student	
Purpose:	Identify any students that do not have a contact shown with parental responsibility .
Selection by:	All children where the parent count is zero.
How:	Lists student names.



	A	B	C	D	E	F
1	Surname	Forename	Reg Year	Count		
2	Adams	James	10A	Year 10	0	
3	Ballinger	Eden	7C	Year 7	0	
4	Banner	Charlotte	7B	Year 7	0	
5	Barnetti	Alexia	7A	Year 7	0	
6	Bell	Leonie	7D	Year 7	0	
7	Blackmore	Frances	7D	Year 7	0	
8	Cruise	Harry	9B	Year 9	0	
9	Evans	Aaron	7D	Year 7	0	
10	Faloon	Aaron	8D	Year 8	0	
11	Fuller	Marissa	7F	Year 7	0	
12	Gatehead	Micheal	7E	Year 7	0	
13	Gill	Andrew	7B	Year 7	0	
14	Gray	Micheal	7D	Year 7	0	
15	Grazer	Alex	7E	Year 7	0	

This simple report shows any students that do not have anybody as listed as having parental responsibility.

Action: Check pupil records and assign parental responsibility to contacts as appropriate. If contacts are missing enter them on the pupil record.

DC02 – Missing Parental Responsibility

Focus Contacts	
Purpose:	To identify any mother or father contacts that do not have parental responsibility ticked. Should assist with tidy up of missing houses.
Selection by:	Type of contact, defaults to mother and father
How:	Lists mothers and fathers where parental responsibility is not true.

Microsoft Excel - Book1

File Edit View Insert Format Tools Data Window Help

</

This report shows any mothers or fathers who do not have parental responsibility indicated on the system. Most natural parents would be expected to have parental responsibility unless there is a court order.

Action: Check pupil records and assign parental responsibility to contacts as appropriate.

DC03 – Parental Responsibility Non-Parent

Focus Contacts	
Purpose:	To identify any other contacts that have parental responsibility ticked, who perhaps should not have.
Selection by:	By contact type excluding mother and father where parental responsibility is ticked.
How:	Lists contact details

Microsoft Excel - Book1

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This report shows those contacts in the system that is showing as having parental responsibility for the child. The system is indicating that these individuals are entitled to full access to the pupils and their records and would be eligible if "parental responsibility" is true.

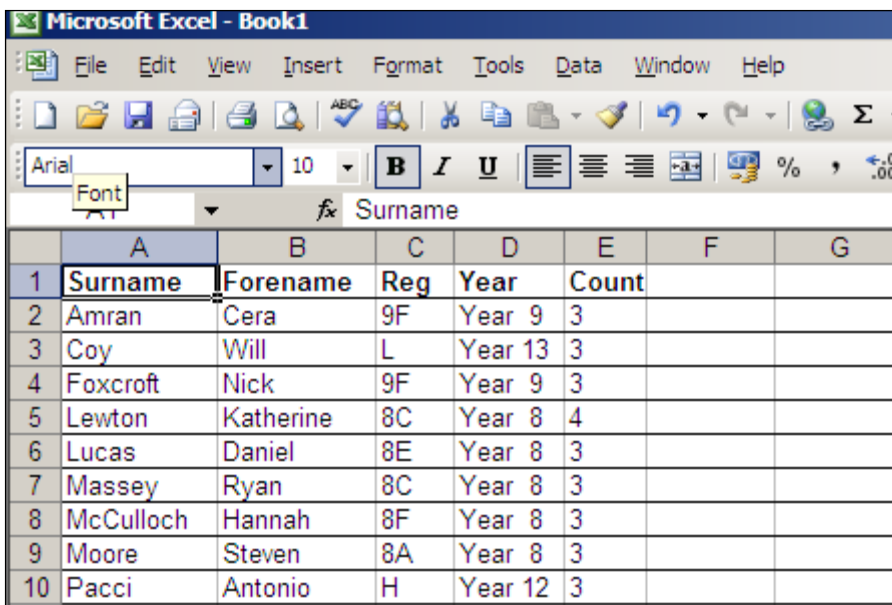
These need to be checked and, as you can see from the example, there are a number of individuals you would not expect to have parental responsibility.

Action: Check pupil records and remove parental responsibility from contacts as appropriate.

Duplicate Contact Reports:

DC04 – Too Many Contacts

Focus Student	
Purpose:	To identify any pupils that have more than two people identified as having parental responsibility .
Selection by:	All pupils where the parent count is greater than 2 .
How:	Lists pupil's names.



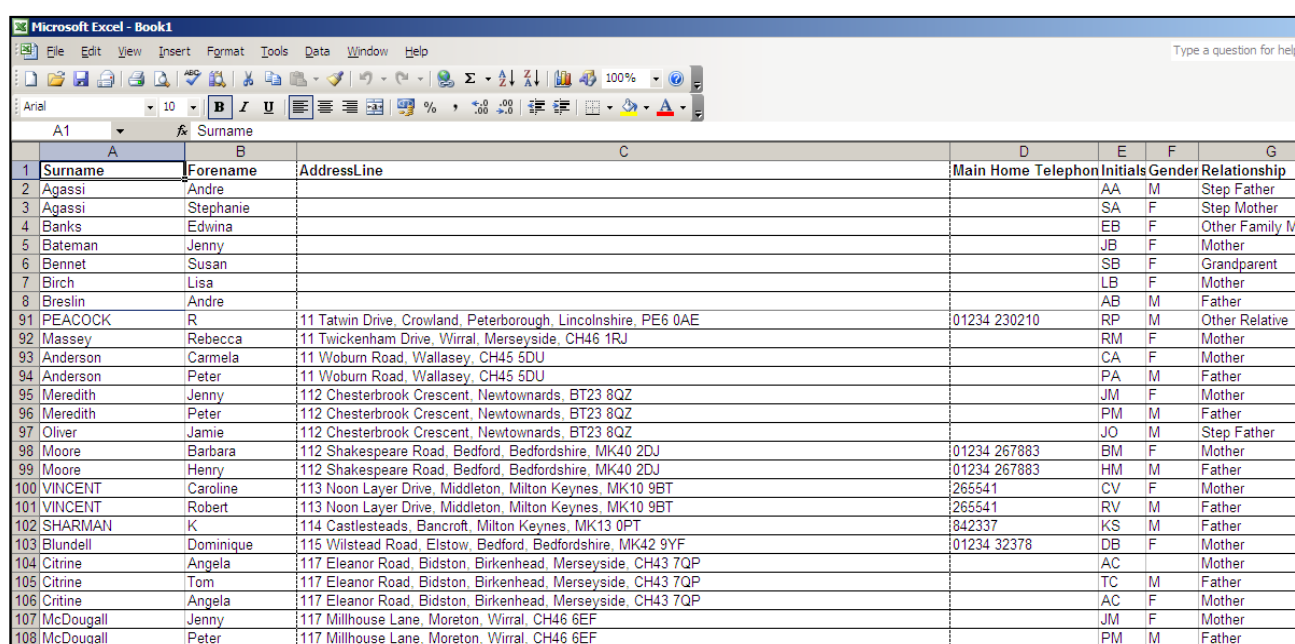
	A	B	C	D	E	F	G
1	Surname	Forename	Reg	Year	Count		
2	Amran	Cera	9F	Year 9	3		
3	Coy	Will	L	Year 13	3		
4	Foxcroft	Nick	9F	Year 9	3		
5	Lewton	Katherine	8C	Year 8	4		
6	Lucas	Daniel	8E	Year 8	3		
7	Massey	Ryan	8C	Year 8	3		
8	McCulloch	Hannah	8F	Year 8	3		
9	Moore	Steven	8A	Year 8	3		
10	Pacci	Antonio	H	Year 12	3		

This simple report shows those students that have more than 2 people identified as having parental responsibility. This may be correct but needs to be checked. Where there are 4 contacts showing, this is usually a good indication of duplicate contacts, often both parents will be repeated.

Action: Remove any duplicate contacts from pupil records, and then delete the unlinked contact.

DC05 – Duplicate Contacts

Focus Contacts	
Purpose:	To allow a manual check of contacts on your system.
Selection by:	Parental responsibility is Yes. Sorts into address line order. This will be a large report. You may also wish to run this in conjunction with CES Reporting Services Duplicate Contact Check Report which sorts by Surname and Forename.
How:	A manual check, line by line looking for duplicate mothers and fathers. This is a big report and a long process.



	A	B	C	D	E	F	G
	Surname	Forename	AddressLine	Main Home Telephone	Initials	Gender	Relationship
1	Agassi	Andre			AA	M	Step Father
2	Agassi	Stephanie			SA	F	Step Mother
3	Banks	Edwina			EB	F	Other Family M
4	Bateman	Jenny			JB	F	Mother
5	Bennet	Susan			SB	F	Grandparent
6	Birch	Lisa			LB	F	Mother
7	Breslin	Andre			AB	M	Father
8	PEACOCK	R	11 Tatwin Drive, Crowland, Peterborough, Lincolnshire, PE6 0AE	01234 230210	RP	M	Other Relative
9	Massey	Rebecca	11 Twickenham Drive, Wirral, Merseyside, CH46 1RJ		RM	F	Mother
10	Anderson	Carmela	11 Woburn Road, Wallasey, CH45 5DU		CA	F	Mother
11	Anderson	Peter	11 Woburn Road, Wallasey, CH45 5DU		PA	M	Father
12	Meredith	Jenny	112 Chesterbrook Crescent, Newtownards, BT23 8QZ		JM	F	Mother
13	Meredith	Peter	112 Chesterbrook Crescent, Newtownards, BT23 8QZ		PM	M	Father
14	Oliver	Jamie	112 Chesterbrook Crescent, Newtownards, BT23 8QZ		JO	M	Step Father
15	Moore	Barbara	112 Shakespeare Road, Bedford, Bedfordshire, MK40 2DJ	01234 267883	BM	F	Mother
16	Moore	Henry	112 Shakespeare Road, Bedford, Bedfordshire, MK40 2DJ	01234 267883	HM	M	Father
17	VINCENT	Caroline	113 Noon Laver Drive, Middleton, Milton Keynes, MK10 9BT	265541	CV	F	Mother
18	VINCENT	Robert	113 Noon Laver Drive, Middleton, Milton Keynes, MK10 9BT	265541	RV	M	Father
19	SHARMAN	K	114 Castlesteads, Bancroft, Milton Keynes, MK13 0PT	842337	KS	M	Father
20	Blundell	Dominique	115 Wilstead Road, Elstow, Bedford, Bedfordshire, MK42 9YF	01234 32378	DB	F	Mother
21	Citrine	Angela	117 Eleanor Road, Bidston, Birkenhead, Merseyside, CH43 7QP		AC		Mother
22	Citrine	Tom	117 Eleanor Road, Bidston, Birkenhead, Merseyside, CH43 7QP		TC	M	Father
23	Citrine	Angela	117 Eleanor Road, Bidston, Birkenhead, Merseyside, CH43 7QP		AC	F	Mother
24	McDougall	Jenny	117 Millhouse Lane, Moreton, Wirral, CH46 6EF		JM	F	Mother
25	McDougall	Peter	117 Millhouse Lane, Moreton, Wirral, CH46 6EF		PM	M	Father

This is a very large report which will require manual checking. There is no easy way to look for duplicate contacts except to scan the list.

Action: Manually check for duplicate contacts and delete as necessary.

Address Correction Reports:

DC06 – Address disclosure

Focus Contacts	
Purpose:	To allow a manual check of Home address can be transferred and Home address can be disclosed transfer flags. Note: these are ticked by default in a pupil's record.
Selection by:	Type of contact, defaults to mother and father . Checks for any contact where parental responsibility is ticked but where address disclosure or address transfer boxes are not ticked.
How:	Lists contact details.

Home address can be transferred should be unticked if concerns regarding the validity of the address and not to be transferred via a CTF or other related individuals.

Home address can be disclosed should be unticked if home address cannot be disclosed to ex-marital partners. When unticked, reports do not produce details of the address.

Print Titles		fx Title													
	A	B	C	D		E		F	G	H	I	J	K	L	M
1	Title	Forename	Surname	address	disclosure	address	transfer	AddressLine	Relationship	PR	Surname	Forename	Year	Reg	
2	Mr	Mike	COY	F		F			Father	T	Coy	Will	Year 13	L	
3	Mrs	Corrinne	Masters	F		F			Mother	T	Masters	Mike	Year 8		
4	Mr	John	Masters	F		F			Father	T	Masters	Mike	Year 8		

On this report you can see that there are 3 contacts that have the address disclosure or address transfer fields showing as "F". This indicates that these fields are not ticked on the contact's record, and as a result their address details will not show on any report or in third party software eg. Parent App, Parent App Lite.

Action: Tick the address disclosure and address transfer boxes on contact records where appropriate.

DC07 – Missing addresses

Focus Student	
Purpose:	To identify any contacts with parental responsibility that <u>does not</u> have a home address . This will help identify missing houses.
Selection by:	Parental responsibility is ticked and street and town of home address is blank.
How:	Lists contact details.

A1	Surname												
	A	B	C	D	E	F	G	H	I	J			
1	Surname	Forename	Reg	Year	Title	Forename	Surname	Relationship	Parental responsibility	AddressLine			
2	Barham	Melissa	8B	Year 8	Mr	Matt	Hammersmith	Step Father	T				
3	Bateman	David	8C	Year 8	Mrs	Jenny	Bateman	Mother	T				
4	Becker	Borris	8B	Year 8	Mr	Becker	Jimmy	Other Family Member	T				
5	Belacqua	Lyra	7D	Year 7	Lady	Marisa	Coulter	Mother	T				
6	Bennet	Michael	8C	Year 8	Mrs	Susan	Bennet	Grandparent	T				
7	Birch	Sam	8B	Year 8	Mrs	Lisa	Birch	Mother	T				
8	Breslin	Rachel	8B	Year 8	Mr	Andre	Breslin	Father	T				

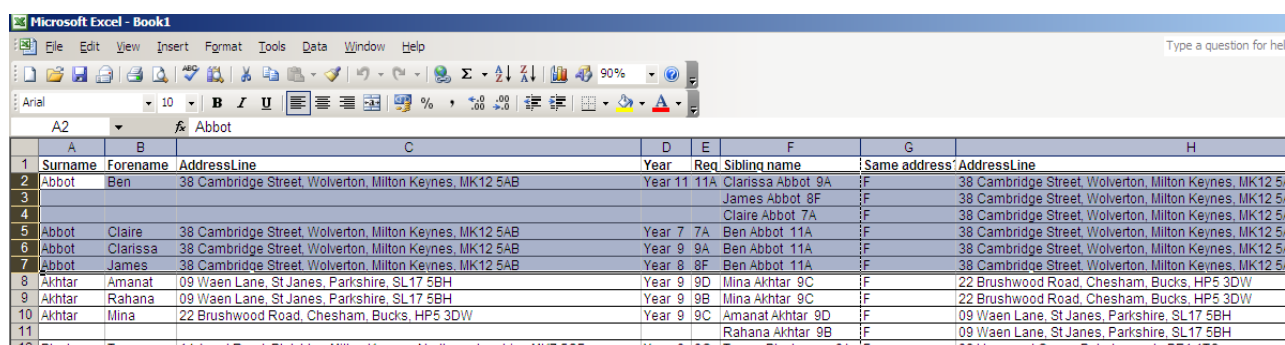
This report shows all contacts on the system with parental responsibility that does not have any address details showing.

Some of these will be listed here because the Address Disclosed and Address Transfer flags are not set correctly on the system.

Action: Enter the address for contacts if known.

DC08 – Sibling Address Different

Focus Student	
Purpose:	To identify duplicate addresses and incorrect addresses/sibling links.
Selection by:	Uses Same Address flag held on family links.
How:	Shows both sets of pupils and their respective addresses . Note: where the address is showing as the same for both pupils this indicates a duplicate address on the system. One of the pupils will almost certainly have a missing house in this instance.



A	B	C	D	E	F	G	H
Surname	Forename	AddressLine	Year	Req	Sibling name	Same address	AddressLine
Abbot	Ben	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB	Year 11	11A	Clarissa Abbot 9A	F	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB
					James Abbot 8F	F	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB
					Claire Abbot 7A	F	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB
Abbot	Claire	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB	Year 7	7A	Ben Abbot 11A	F	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB
Abbot	Clarissa	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB	Year 9	9A	Ben Abbot 11A	F	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB
Abbot	James	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB	Year 8	8F	Ben Abbot 11A	F	38 Cambridge Street, Wolverton, Milton Keynes, MK12 5AB
Akhtar	Amanat	09 Waen Lane, St James, Parkshire, SL17 5BH	Year 9	9D	Mina Akhtar 9C	F	22 Brushwood Road, Chesham, Bucks, HP5 3DW
Akhtar	Rahana	09 Waen Lane, St James, Parkshire, SL17 5BH	Year 9	9B	Mina Akhtar 9C	F	22 Brushwood Road, Chesham, Bucks, HP5 3DW
Akhtar	Mina	22 Brushwood Road, Chesham, Bucks, HP5 3DW	Year 9	9C	Amanat Akhtar 9D	F	09 Waen Lane, St James, Parkshire, SL17 5BH
					Rahana Akhtar 9B	F	09 Waen Lane, St James, Parkshire, SL17 5BH

This is the most useful report in identifying duplicate addresses on the system.

It is possible from the example above to see that Ben Abbot has the same address as that of his siblings, Clarissa, James and Claire. However, the system does not recognise them as living at the same address though it knows that they are related.

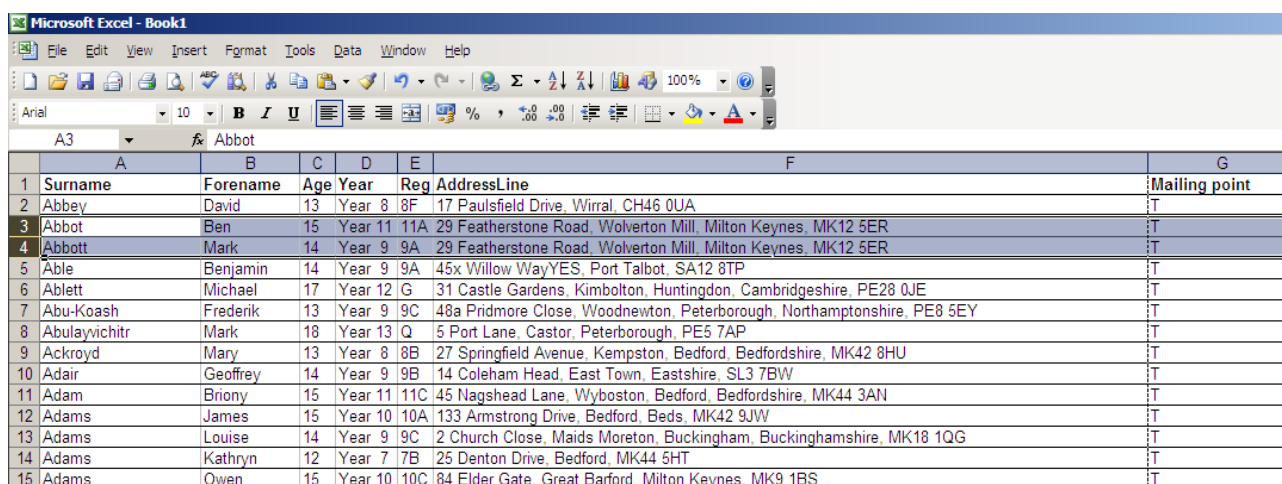
In this example there is no other explanation than there must be a duplicate address.

Action: Ensure that all family members are linked to the same record of the address (see **Identifying Missing House Icons**).

Other Data Checking Reports:

DC09 – Mailing Point | Sibling Links Check

Focus Student	
Pre-requisite	Must run Set Mailing point routine from: Tools Housekeeping General
Purpose:	To identify sibling links <u>not correct</u> within SIMS and to help identify missing houses. To update the Mailing Point in SIMS. This report may not be relevant in your school.
Selection by:	All children where mailing point is ticked.
How:	The report is sorted by surname and address. If the sibling relationship is correctly defined only one child per address will be shown. Multiple children per address indicate a problem with the SIMS data. Note: any twins will both show with mailing point set but may not be an error.



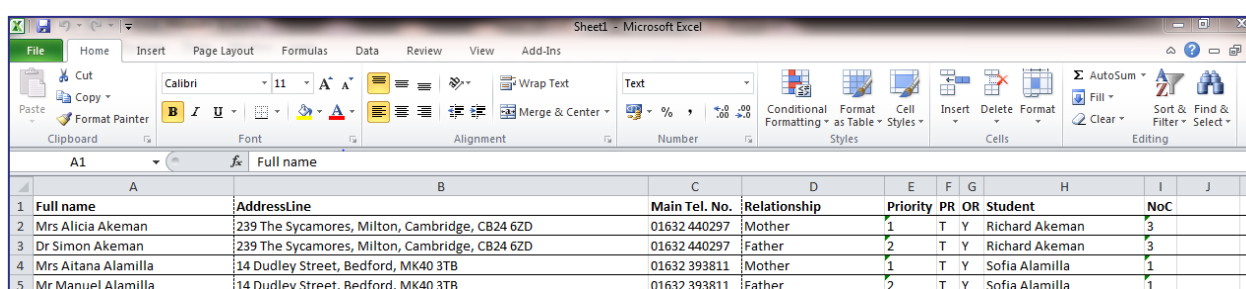
	A	B	C	D	E	F	G
	Surname	Forename	Age	Year	Reg	AddressLine	Mailing point
1	Abbey	David	13	Year 8	8F	17 Paulsfield Drive, Wirral, CH46 0UA	T
2	Abbot	Ben	15	Year 11	11A	29 Featherstone Road, Wolverton Mill, Milton Keynes, MK12 5ER	T
3	Abbot	Ben	15	Year 11	11A	29 Featherstone Road, Wolverton Mill, Milton Keynes, MK12 5ER	T
4	Abbott	Mark	14	Year 9	9A	29 Featherstone Road, Wolverton Mill, Milton Keynes, MK12 5ER	T
5	Able	Benjamin	14	Year 9	9A	45x Willow Way, Port Talbot, SA12 8TP	T
6	Ablett	Michael	17	Year 12	G	31 Castle Gardens, Kimbolton, Huntingdon, Cambridgeshire, PE28 0JE	T
7	Abu-Koash	Frederik	13	Year 9	9C	48a Pridmore Close, Woodnewton, Peterborough, Northamptonshire, PE8 5EY	T
8	Abulayvichitr	Mark	18	Year 13	Q	5 Port Lane, Castor, Peterborough, PE5 7AP	T
9	Ackroyd	Mary	13	Year 8	8B	27 Springfield Avenue, Kempston, Bedford, Bedfordshire, MK42 8HU	T
10	Adair	Geoffrey	14	Year 9	9B	14 Coleham Head, East Town, Eastshire, SL3 7BW	T
11	Adam	Briony	15	Year 11	11C	45 Nagshead Lane, Wyboston, Bedford, Bedfordshire, MK44 3AN	T
12	Adams	James	15	Year 10	10A	133 Armstrong Drive, Bedford, Beds, MK42 9JW	T
13	Adams	Louise	14	Year 9	9C	2 Church Close, Maids Moreton, Buckingham, Buckinghamshire, MK18 1QG	T
14	Adams	Kathryn	12	Year 7	7B	25 Denton Drive, Bedford, MK44 5HT	T
15	Adams	Owen	15	Year 10	10C	84 Elder Gate, Great Barford, Milton Keynes, MK9 1BS	T

This report should be run in conjunction with the Set Mailing Point Housekeeping option. If data is held correctly on the system, only one child from each family will appear on this report as the mailing point. This is either the oldest or the youngest, dependant on how you ran your Mailing point routine. Where the 2 children are showing on this report who belong to the same family, as for the Abbott family above, then this indicates a duplicate contact. The system is not recognising them correctly as being siblings.

Action: Manually check that only one child per family is showing. For any families where this is not the case checks parental responsibility and check for duplicate contacts.

DC10 – Parental Responsibility List

Focus Contact	
Purpose:	To list all contacts with parental responsibility.
Selection by:	All contacts with parental responsibility . Additional filter by year group if required.
How:	Shows contact name, relationship and address, student name. This report lists all contacts with parental responsibility that have at least one child on roll. This can be used to determine which parents receive contact via third party software. It permits filtering by Year Group, if you wish to work with one Year Group at a time.



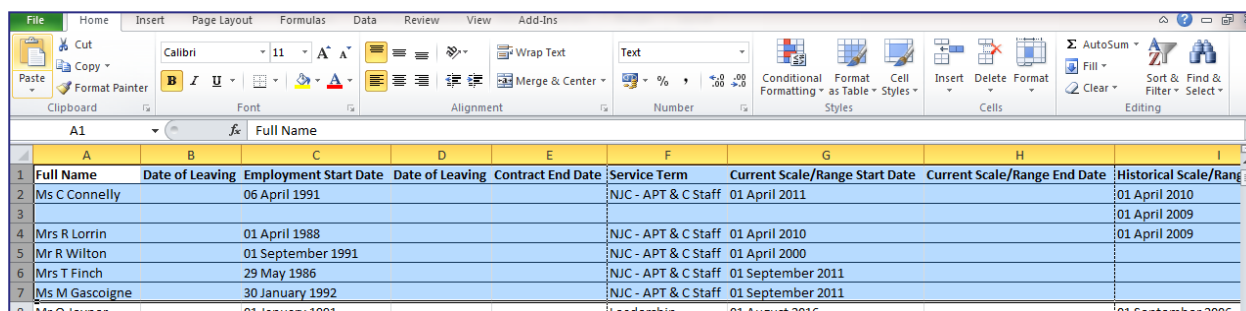
Full name	AddressLine	Main Tel. No.	Relationship	Priority	PR	OR	Student	NoC
Mrs Alicia Akeman	239 The Sycamores, Milton, Cambridge, CB24 6ZD	01632 440297	Mother	1	T	Y	Richard Akeman	3
Dr Simon Akeman	239 The Sycamores, Milton, Cambridge, CB24 6ZD	01632 440297	Father	2	T	Y	Richard Akeman	3
Mrs Aitana Alamilla	14 Dudley Street, Bedford, MK40 3TB	01632 393811	Mother	1	T	Y	Sofia Alamilla	1
Mr Manuel Alamilla	14 Dudley Street, Bedford, MK40 3TB	01632 393811	Father	2	T	Y	Sofia Alamilla	1

PR	= Parental Responsibility. Value T = True
OR	= On Roll. At least one of their children is on roll.
NoC	= Number of children for which they are a contact including those for which they do not have parental responsibility.

Personnel Reports:

DC – Missing Scale/Range End Date

Focus Staff	
Purpose:	To identify missing end dates for current and leavers. Also enables checking of scale or range for staff – making sure that they have a current record.
Selection by:	All Staff with eligible for SWR is ticked.
How:	The report is sorted by surname and address and presented in Excel for easy sorting.



Full Name	Date of Leaving	Employment Start Date	Date of Leaving	Contract End Date	Service Term	Current Scale/Range Start Date	Current Scale/Range End Date	Historical Scale/Range
Ms C Connolly		06 April 1991			NJC - APT & C Staff	01 April 2011		01 April 2010
Mrs R Lorrin		01 April 1988			NJC - APT & C Staff	01 April 2010		01 April 2009
Mr R Wilton		01 September 1991			NJC - APT & C Staff	01 April 2000		01 April 2009
Mrs T Finch		29 May 1986			NJC - APT & C Staff	01 September 2011		
Ms M Gascoigne		30 January 1992			NJC - APT & C Staff	01 September 2011		
Mr O Jovner		01 January 1991			Leadership	01 August 2016		01 September 2006

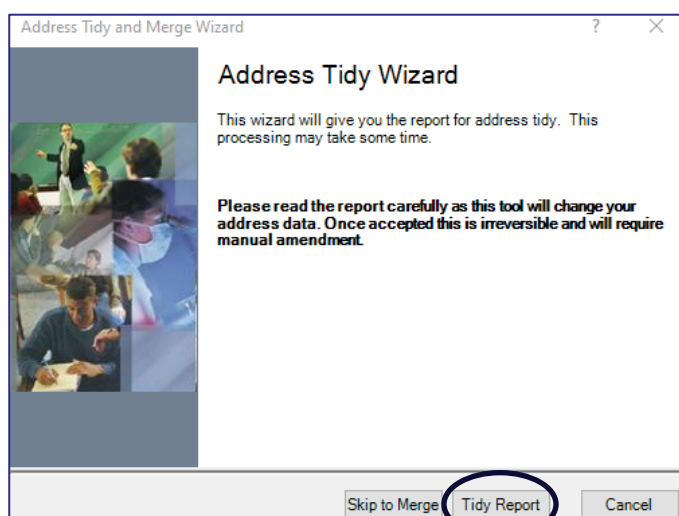
Chapter 6 Maintaining School Data

Introduction

It is advisable to carry out the following routines on a termly basis. This will keep the SIMS data up to date.

Tidy and Merge Addresses

Route	Tools Housekeeping Bulk Address Tools Tidy and Merge Addresses
Purpose:	To identify incorrectly formatted address.
How:	Click Tidy Report to view addresses report. The report will show address before and after rules have been applied. Check the addresses list report to ensure you are happy with the changes. Any changes made via Merge are irreversible. Return to SIMS and select Skip to Merge. Note: Address rules are pre-determined by ESS. Before you amend any, please contact the ICT Schools Team for further advice.



Address Tidy Report										
Address Type	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Before	-	-	10	Queen Street	-	Wrexham	-	LL11 1AP	United Kingdom	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above
Before	-	-	2	Catherine Road	Flitwick	Bedford	-	MK45 1DD	United Kingdom	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above
Before	-	-	15	Woburn Road	-	Luton	Bedfordshire	LU5 3PP	United Kingdom	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above
Before	-	-	-	Ruffs Furze	-	Oakley	Bedford	MK43 7RS	United Kingdom	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above
Before	-	-	3	Hawthorne Avenue	-	Bedford	-	MK40 4HJ	United Kingdom	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above
Before	-	-	17	The Furlong	Oakley	Bedford	-	MK43 7RD	-	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above

Address Tidy and Merge Wizard

Address Merge Wizard

This wizard will give you the report for address merge. This processing may take some time.

Please read the report carefully as this tool will change your address data. Once accepted this is irreversible and will require manual amendment.

Merge Report Cancel

Address Merge Report

Status	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Original	-	-	1	Eagles Close	-	Swindon	-	SN7 1UR	-	<none, ever>
Original	-	-	1	Eagles Close	-	Swindon	-	SN7 1UR	-	[Res] Lester, Mrs Sabina
Merged	-	-	1	Eagles Close	-	Swindon	-	SN7 1UR	-	as above
Original	-	Brinkle Springs	-	Acce Dyke Lane	Bratton Bootha	Lincoln	-	LN4 1UD	-	<none, ever>
Original	-	Brinkle Springs	-	Acce Dyke Lane	Bratton Bootha	Lincoln	-	LN4 1UD	-	[R] Lawley, Alex
Merged	-	Brinkle Springs	-	Acce Dyke Lane	Bratton Bootha	Lincoln	-	LN4 1UD	-	as above
Original	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	215	[R] Bradbury, Christina
Original	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	-	[R] Tate, Kate Lauren
Merged	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	215	as above
Original	-	-	3	Bunting Road	-	Northampton	-	NN2 6RZ	-	[R] Rowe-Jones, Selma
Original	-	-	3	Bunting Road	-	Northampton	-	NN2 6RZ	-	[R] Harding, Yana Ma

Unmatchable Address Report

Route	Tools Housekeeping Bulk Address Tools Unmatchable Addresses Report
Purpose:	To identify unmatched Address held in the Database.
How:	Report will show any address which are not validated or connected. NOTE: This report can only be run once. Please print or save the report to check address.

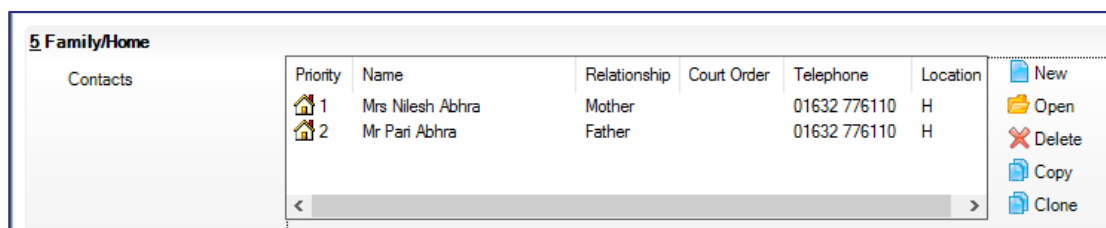
Unmatchable Address Report

Unmatchable Address	Residents
23 Peak Drive	[Cat] Yoo, Mr Charlie for Yoo, Aiden
Lower Garfield Street Belfast Northern Ireland LN3 4JJ	[St] Yeringhoff, Hetty
Station Road Letchworth Garden City Hertfordshire SG6 3BQ	[App] DiLorenzo, Antonio Luca

Identifying Missing House Icons in a Student's Record

When checking pupil details, it is important in **Panel 5: Family/Home** the house icon is showing correctly as seen below.

The only way to check for missing houses is to manually work through your pupil records.



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

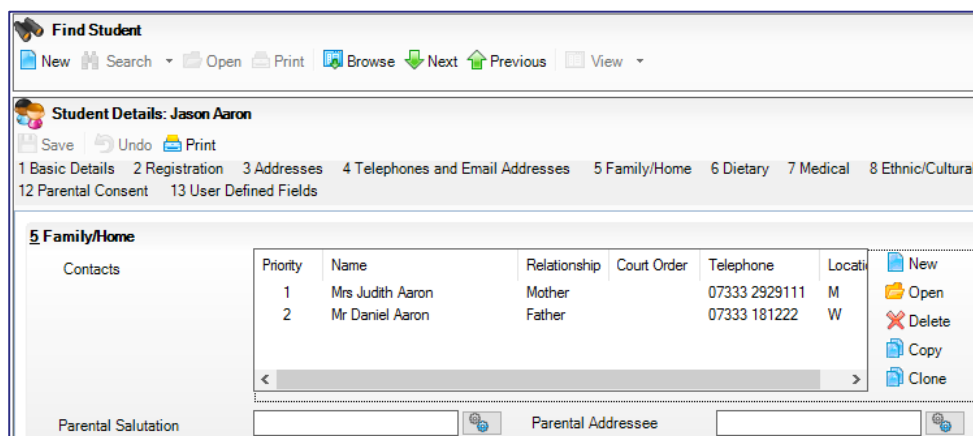
As previously mentioned, the house icon indicates that the contact is living at the same address as that of the child. This is usually the mother and father but also occasionally another relative.

If the house icon is missing, then the contact is not living at the same address. This may be because no address details have been entered **or** that they have been entered incorrectly, resulting in a duplicate address. It is imperative these details are recorded properly and this should be corrected when noticed.

Resolving Duplicate Addresses

One reason for having a missing house on the system is the presence of a duplicate address. The parent without the house will be living at an address that looks similar or the same but which the SIMS believes to be different.

In the image below, we can see that Mr and Mrs Aaron do not have houses attached to them, yet when checking the records both the child Jason, and his parents, appear to be living at the same address, 24 Granville Street, Aylesbury, HP20 2JR.



Priority	Name	Relationship	Court Order	Telephone	Location
1	Mrs Judith Aaron	Mother		07333 2929111	M
2	Mr Daniel Aaron	Father		07333 181222	W

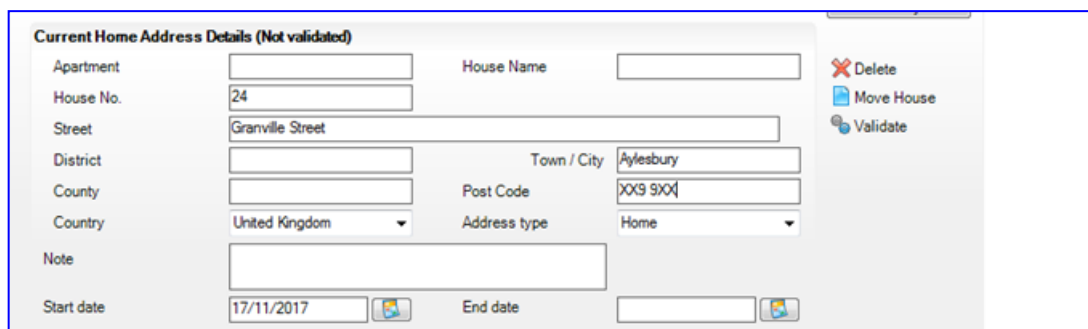
Occasionally you may have lots of duplicate addresses and it can be difficult to determine which one is associated with the student! It is essential that all contacts are linked to the same record if living at the same address.

Here we will look at not only how to associate the contact with the correct address record, but also how to flag the duplicate so that we don't use it again.

From the Edit Contact Screen for Mrs Aaron we need to change her address to the same record as that of Jason, but also to mark the duplicate address as a duplicate, so that we do not use it again.

1. Click **Modify Address**.
2. Click **Yes** to the message: "You are about to make a minor correction to the address....."

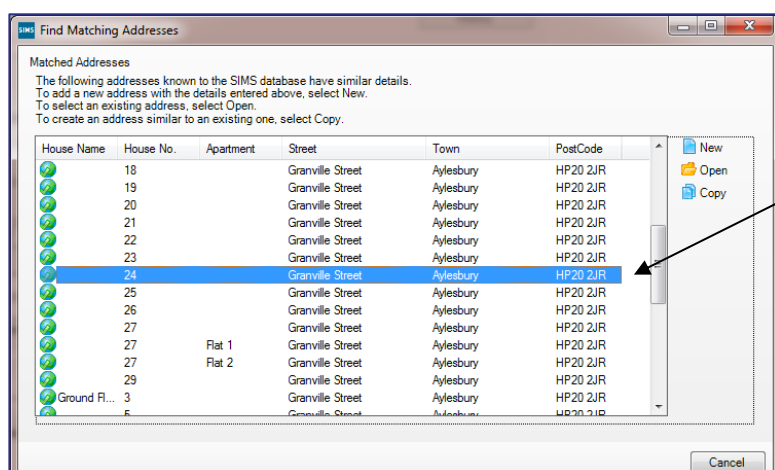
3. The Address fields will be displayed in Edit Mode as shown in the next image.
4. Change the Postcode to XX9 9XX.



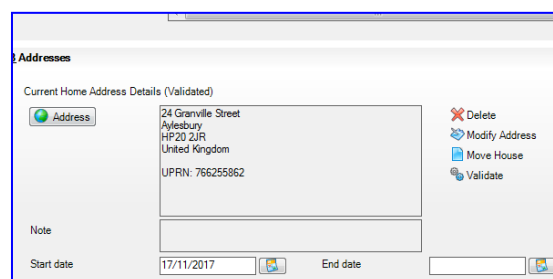
5. **Save** the record.
6. **Delete Mrs Aaron's** address.
7. Click **Yes** to the message "You are about to delete the selected address, do you wish to continue?".
8. **Save** the change.

NOTE: The address has been removed from the record, but **not** deleted from the database.

Enter HP20 2JR into Postcode field and press **Continue**. It is now possible to only see one address.



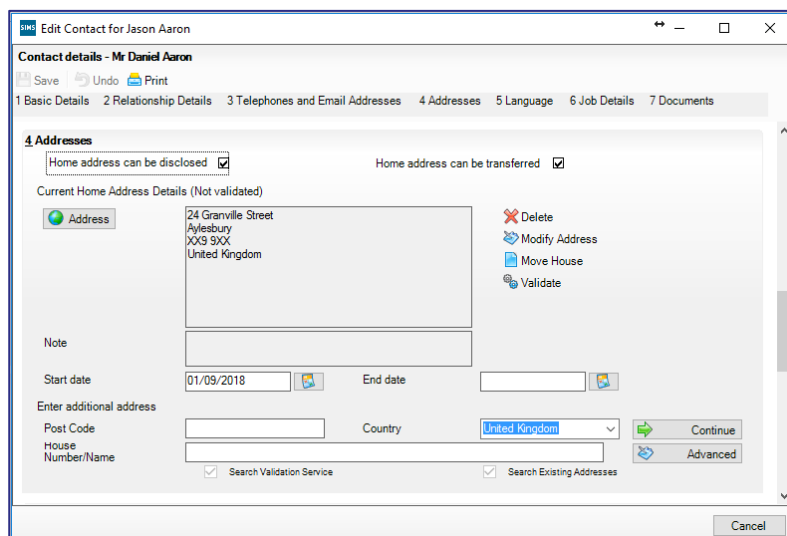
9. Highlight the correct address and click **Open**
10. Enter the Address type = **Home**
11. Click **Save** and **OK**.



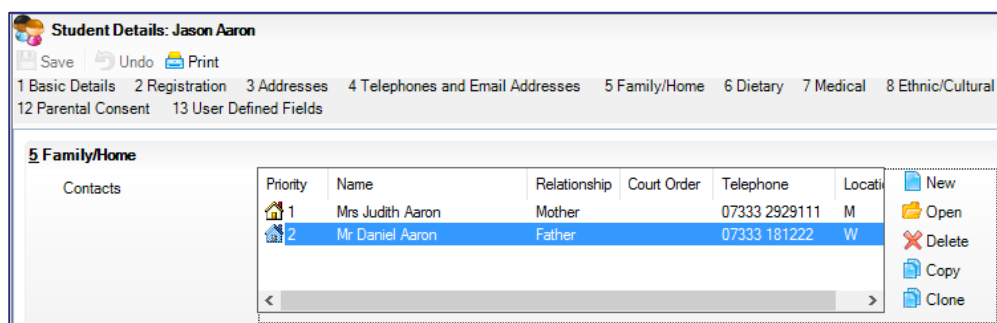
Repeat this process for the father's record.

On selecting the father's record, if only one duplicate address exists on the system, then his address will already be showing with XX.

Now it is just necessary to delete this address and associate him with the correct address.

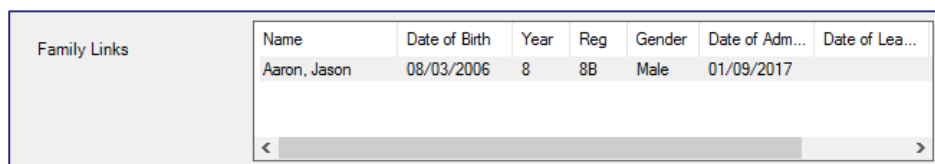


If his address is not showing with XX, then you may have an additional duplicate record (check to see if the postcode is slightly different), in which case you need to start the process again.



Priority	Name	Relationship	Court Order	Telephone	Location
1	Mrs Judith Aaron	Mother		07333 2929111	M
2	Mr Daniel Aaron	Father		07333 181222	W

Once you have made all the necessary changes it is important that you check any siblings to ensure that they are still showing correctly. As a rule, the eldest child is normally the correct record; it is the younger sibling records that are usually incorrect.



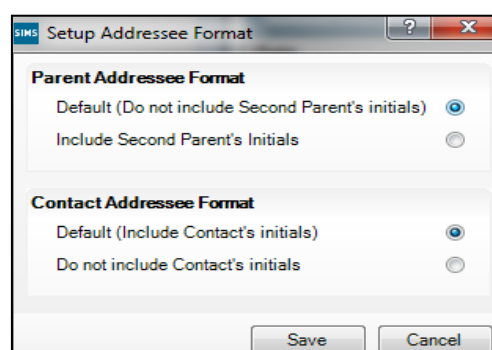
Name	Date of Birth	Year	Reg	Gender	Date of Adm...	Date of Lea...
Aaron, Jason	08/03/2006	8	8B	Male	01/09/2017	

NOTE: Web Address Validation will eradicate most duplicate address issues.

If you do not have WAV, (or are not sure), or are having difficulties resolving missing houses, please contact the ICT Schools Team: 01296 383500 option 1, or email: ictschools@buckinghamshire.gov.uk for assistance.

Setup Addresses Format

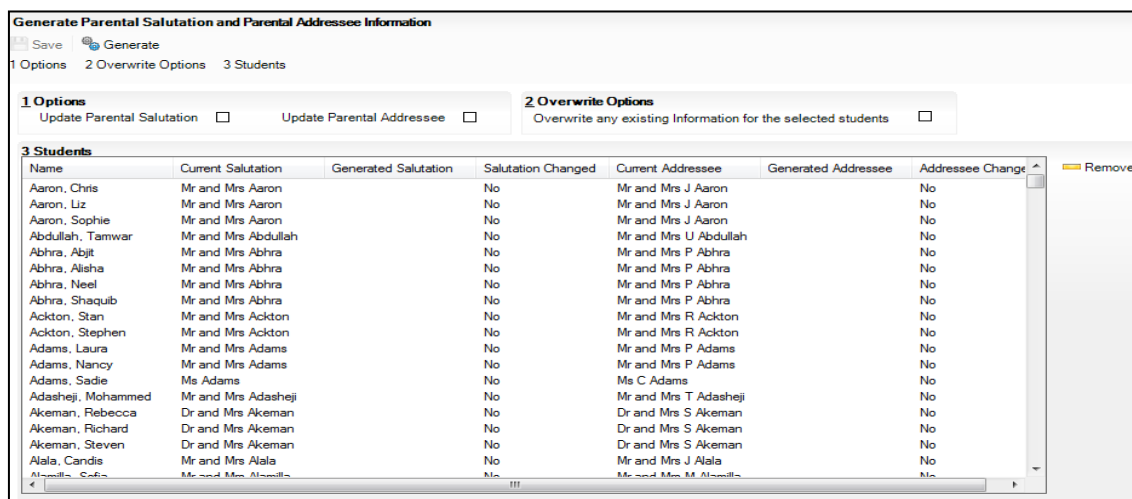
1. Select **Tools | Setups | Setup Addressee Format**.
2. Choose your preferences.
3. **Save**.



Update Parental Salutation / Parental Addressee

1. Select **Routines | Pupil | Update Parental Salutation/Addressee | Parental**
2. Click **Search** to populate with all pupils.
3. Next to the **Select** folder, click the down arrow and choose **All**.

This moves all Pupils into the **Generate Parental Salutation and Parental Addressee Information** panel.

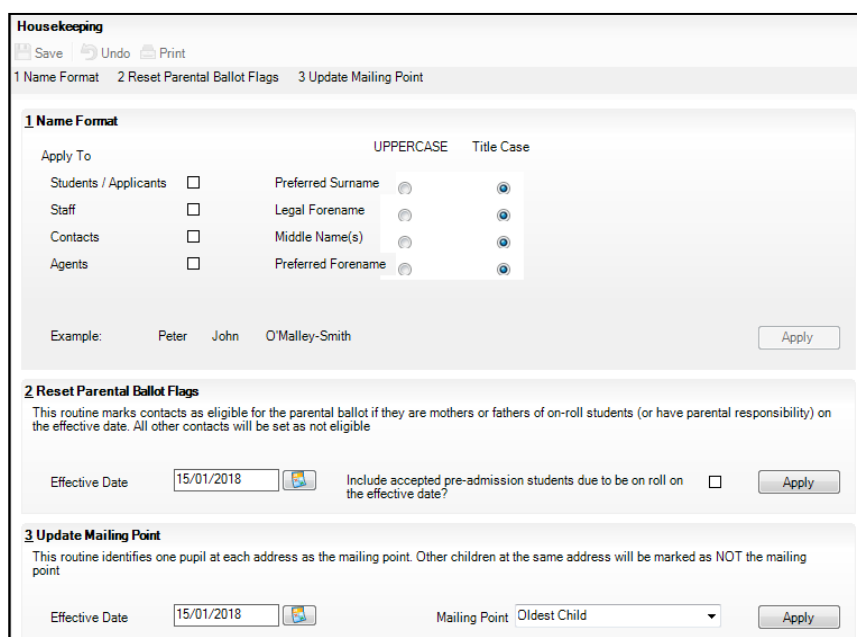


Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Change
Aaron, Chris	Mr and Mrs Aaron	No	No	Mr and Mrs J Aaron	No	No
Aaron, Liz	Mr and Mrs Aaron	No	No	Mr and Mrs J Aaron	No	No
Aaron, Sophie	Mr and Mrs Aaron	No	No	Mr and Mrs J Aaron	No	No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

4. In the **Options** Panel, tick the **Update Parental Salutation**, **Update Parental Addressee** and **Overwrite any existing Information for the selected students** checkboxes.
5. Click **Generate**  **Generate**.
6. The generated salutations and addressees will show in the Students panel.
7. Click **Save** to save the changes.

Name Format | Reset Parental Ballot Flags | Update Mailing Point

1. Select **Tools | Housekeeping | General**.



1 Name Format

UPPERCASE Title Case

Apply To

Students / Applicants ☐ Preferred Surname ☐ Legal Forename ☐

Staff ☐ Middle Name(s) ☐ Preferred Forename ☐

Contacts ☐

Agents ☐

Example: Peter John O'Malley-Smith

2 Reset Parental Ballot Flags

This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible

Effective Date Include accepted pre-admission students due to be on roll on the effective date? ☐

3 Update Mailing Point

This routine identifies one pupil at each address as the mailing point. Other children at the same address will be marked as NOT the mailing point

Effective Date Mailing Point

2. In the **Name Format** panel place a tick in the data area for the person type to apply the changes to.

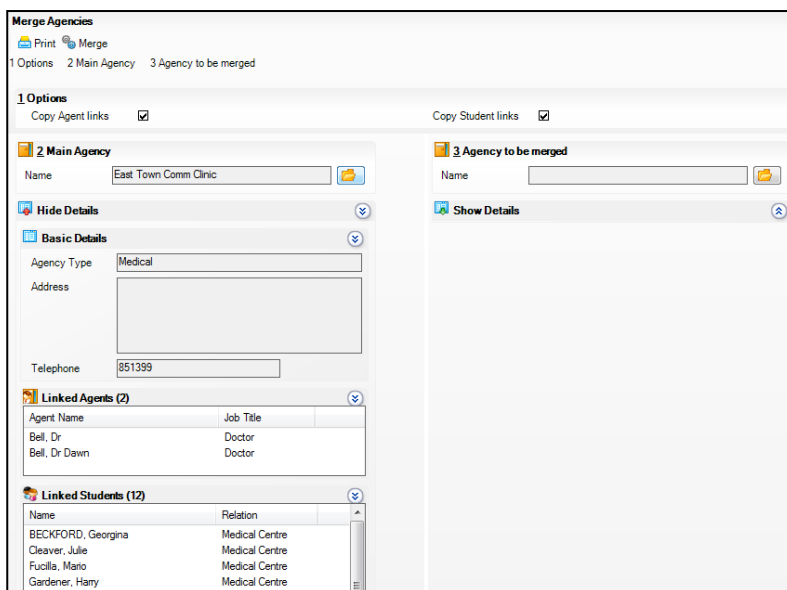
3. Select the required radio button (the example will update to reflect your selection).
4. Click **Apply**.
5. In the **Reset Parental Ballot Flags** panel click **Apply**. This routine marks contacts that have parental responsibility as eligible for parental ballot.
6. In the **Update Mailing Point** panel select Oldest or Youngest child in the family to be the Mailing Point.
7. Click **Apply**.

Merging Agencies

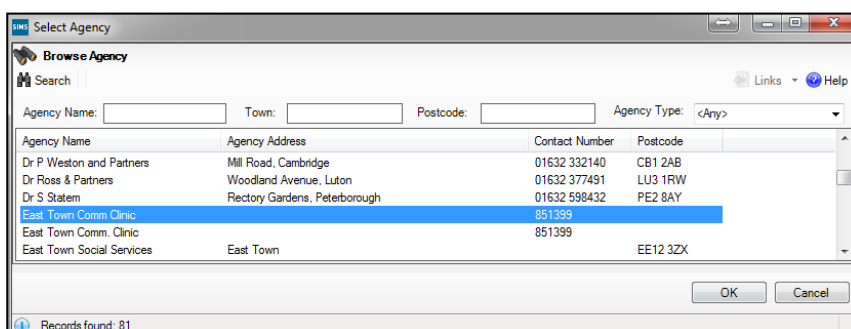
Over time, duplicate **Agencies** may find their way onto the system and cause confusion. They may have been introduced by importing CTF files or users inadvertently replicating data that has previously been entered in a slightly different format.

As there is information linked to the Agency, it is not recommended to delete them. A routine is available to **merge** the information stored in duplicate agencies, producing **one agency** with a combination of data from each.

1. Select **Tools | Housekeeping | Merge Agencies** to open the Merge Agencies page.
2. In the **Options** panel, tick **Copy Agent Links** and **Copy Student Links** as required.



3. In the **Main Agency** panel on the left-hand side of the page, click on the **Open** folder adjacent to the **Name** field to display the Select Agency browser.
4. Click **Search** to display a list of agencies.
5. Scroll through the list to search for duplicates, in this example **East Town Comm. Clinic**.



Agency Name	Agency Address	Contact Number	Postcode
Dr P Weston and Partners	Mill Road, Cambridge	01632 332140	CB1 2AB
Dr Ross & Partners	Woodland Avenue, Luton	01632 377491	LU3 1RW
Dr S Statem	Rectory Gardens, Peterborough	01632 598432	PE2 8AY
East Town Comm Clinic		851399	
East Town Comm. Clinic		851399	
East Town Social Services	East Town		EE12 3ZX

6. Select one of the versions of the agency to be the main receiving agency by double clicking it.

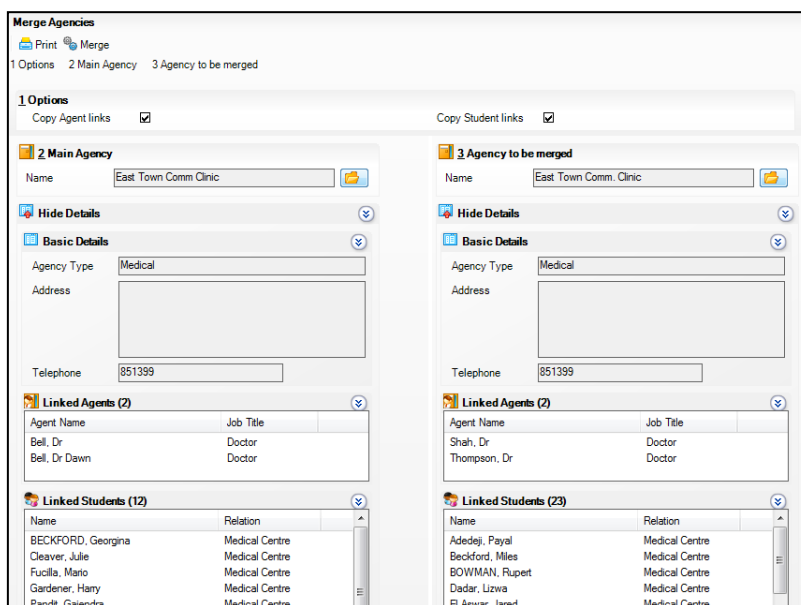
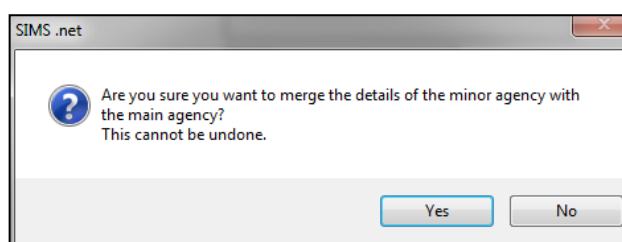
7. In the **Agency to be merged** panel on the right-hand side of the page, click on the **Open** folder adjacent to the **Name** field to display the Select Agency browser.

8. Click **Search** to display a list of agencies and select the other version of the agency by double clicking it.

9. If you are certain that the information held for the agency to be merged should be transferred over into the main receiving agency, click **Merge** at the top of the screen.

10. A message will be displayed asking you to confirm the action.

11. Select **Yes** and Close.

SIMS Database Maintenance Checks

The following routines should be run regularly to check every record held in SIMS against its specific validation checks.

Validate Memberships

Go to: **Tools | Validate Memberships** and select **OK**.

Database Diagnostics

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

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

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

Chapter 7 GDPR Housekeeping Routines

Record Management in Schools

The **Information Management Toolkit for Schools**, published by the Information and Records Management Society (IRMS), has been created to assist schools to manage their information in line with the current legislative frameworks <https://irms.org.uk/page/schoolstoolkit>

The toolkit has been revised since the previous version (May 2012) and a number of additions and amendments have been made. Note this new version refers to both “**Records Management**” and “**Information Management**” interchangeably.

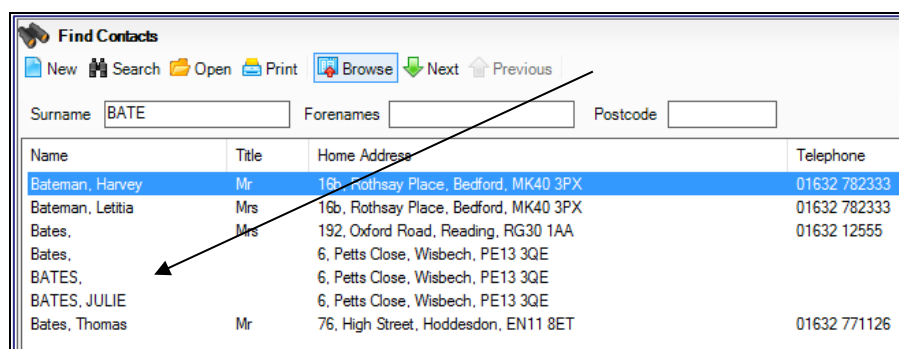
Schools must follow their own Records Management and retention policies before deleting data from SIMS. **Chapter 7, 8 and 9** covers how to run the housekeeping routines, not whether they should be.

Deleting unlinked contacts and unlined persons should be actioned on a regular basis and certainly at least at the end of an academic year to tidy the SIMS database.

Check for Duplicate Contacts

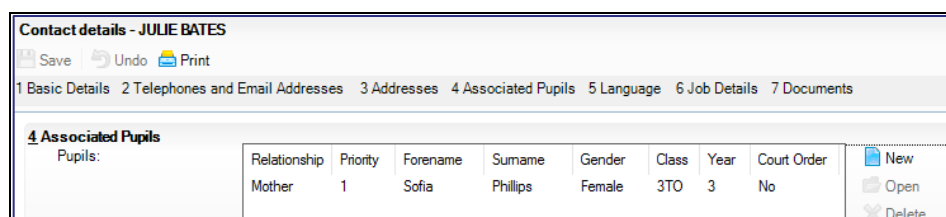
1. Select **Focus | Person | Contacts**.
2. Either select **Search** to populate the browser window, or enter a name to reduce the list.

As you can see in the highlighted field two Mrs Bates are showing, one must be a duplicate. Where you are not sure then the address and/or the telephone number will usually help.



Name	Title	Home Address	Telephone
Bateman, Harvey	Mr	16b, Rothsay Place, Bedford, MK40 3PX	01632 782333
Bateman, Letitia	Mrs	16b, Rothsay Place, Bedford, MK40 3PX	01632 782333
Bates, Mrs	Mrs	192, Oxford Road, Reading, RG30 1AA	01632 12555
Bates, Mrs		6, Petts Close, Wisbech, PE13 3QE	
BATES, JULIE		6, Petts Close, Wisbech, PE13 3QE	
Bates, Thomas	Mr	76, High Street, Hoddesdon, EN11 8ET	01632 771126

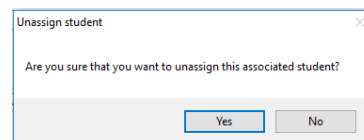
3. Open each of the Mrs Bates records in turn and decide which one is the one you wish to keep.
4. Click on **Panel 4: Associated Pupils** hyperlink on both records to see if Mrs Bates is associated twice with the same pupil, or as is more likely, one record is associated with the older child and the second record with a younger sibling.



Pupils:	Relationship	Priority	Forename	Surname	Gender	Class	Year	Court Order	
	Mother	1	Sofia	Phillips	Female	3TO	3	No	New Open Delete

5. Having chosen the Mrs Bates record that you wish to keep, ensure all her children are showing in the Associated Pupils panel **once**.
6. If a child is missing, use the **New** option to link the child to the mother record.

7. Open the Mrs Bates record that you are discarding, enter **ZZ** by the Surname and **Save**. Highlight any associated pupils and delete them. This does not delete the pupil record; it merely removes the association with the mother record.
 8. The system will prompt you, click **Yes** to continue.
 9. **Save**.
 10. Make a note of any details that you wish to keep in case you need to re-enter these at some point.
- Don't forget CTRL & Print Screen pressed together will copy an image of your computer onto the Clipboard. You can then paste this into Word to save the information quickly.
11. Select **Close** on the lower window.



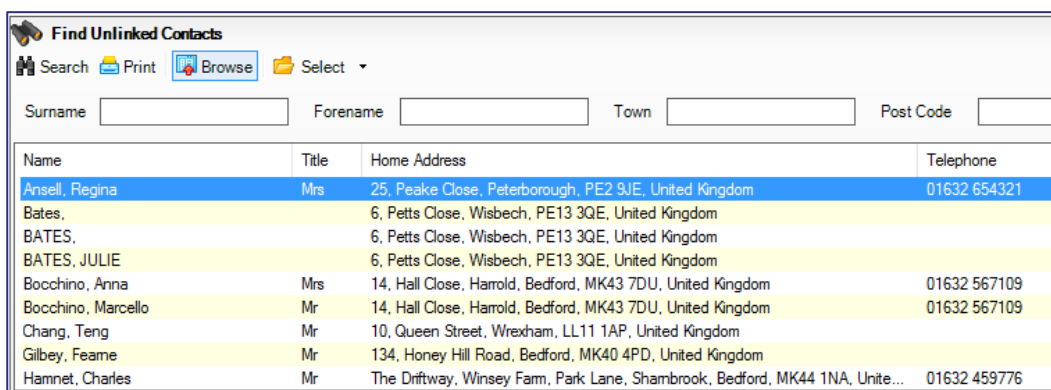
Delete Unlinked Contacts

Unlinked contacts do not have any association with another record on SIMS and may be parents, staff, doctors etc.

These are often duplicate contacts that have been corrected on the pupil record, or may be a contact that has remained after a pupil record has been deleted.

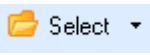
It is recommended to delete a maximum of **10 records** at a time to ensure SIMS does not time out and ideally run at a time where most users are logged out of SIMS.

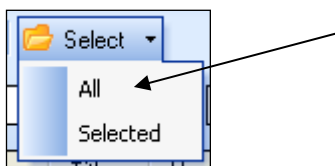
1. Go to **Tools | Housekeeping | Delete Unlinked Contacts**.
2. Click **Search** to display list of contacts for deletion.
3. From here you can select one at a time by doubling clicking on the name.



The screenshot shows the "Find Unlinked Contacts" window. It has a toolbar with "Search", "Print", "Browse", and "Select" (with a dropdown arrow). Below the toolbar are input fields for "Surname", "Forename", "Town", and "Post Code". The main area is a table with four columns: "Name", "Title", "Home Address", and "Telephone".

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

4. If you wish to **Select All** then click on the down arrow next to the Select icon  which will present **All** as a choice.



The following screen is displayed, showing all the contacts that are selected for deletion.

Unlinked Contacts to be deleted

✕ Delete 🖨️ Print

1 Contacts to be deleted

1 Contacts to be deleted

Name	Title	Home Address	Telephone		Remove
Bates,		6, Petts Close, Wisbech, PE13 3QE, United Kingdom			
BATES,		6, Petts Close, Wisbech, PE13 3QE, United Kingdom			
BATES, JULIE		6, Petts Close, Wisbech, PE13 3QE, United Kingdom			
Bocchino, Anna	Mrs	14, Hall Close, Harrold, Bedford, MK43 7DU, United Kingdom	01632 567109		
Bocchino, Marcello	Mr	14, Hall Close, Harrold, Bedford, MK43 7DU, United Kingdom	01632 567109		
Chang, Teng	Mr	10, Queen Street, Wrexham, LL11 1AP, United Kingdom			
Gilbey, Feame	Mr	134, Honey Hill Road, Bedford, MK40 4PD, United Kingdom			
Hamnet, Charles	Mr	The Driftway, Winsey Farm, Park Lane, Sharnbrook, Bedfo...	01632 459776		
Phillips, Mary	Mrs	15, Woburn Road, Luton, Bedfordshire, LU5 3PP, United K...	07333 543210		
Smith, Diane	Mrs	11, Conway Drive, Flitwick, Bedford, MK45 1DE, United Ki...	01632 400555		
Walker, Jim	Mr		01632 811902		
Walker, Jim		1, Knights Way, Milton, Cambridge, CB24 6DE, United King...	01632 811902		
Walker, John			01632 811902		
Marcetic, Andrejz					
Marsden, Alice	Ms	4, Rose Close, Hartwell, Northampton, NN7 2PR, United Ki...			
Phillips, Jason		15, Woburn Road, Luton, Bedfordshire, LU5 3PP, United K...			
Link, Chain					
Ansell, Regina	Mrs	25, Peake Close, Peterborough, PE2 9JE, United Kingdom	01632 654321		

If you are unsure about some of the records and wish to keep them, highlight the records you wish to keep then click the **Remove** icon on the right hand side of the screen. This removes those records from the deletion list.

- Once you are happy that you wish to delete all of the records, click **Delete**.
- Reply **Yes** to the message, "Do you want to delete the unlinked contacts?"
- All unlinked contacts will then be deleted.

Delete Unlinked Persons

Unlinked persons do not have any association with another record on SIMS and should be deleted.

- Go to **Tools | Housekeeping | Delete Unlinked Persons**.

Delete Unlinked Persons

✕ Delete

Number of unlinked persons: 12 Number selected: 0

☐	Name	Title	Home Address	Telephone
☐	Antas, Sergei			
☐	Chaplin, D.	Mr	East Town Council	01632 5
☐	Crane, S	Mrs	6, Western Drive, Wilverton, Rapsire	01632 1
☐	Grimwald, Harold	Mr		
☐	Hard, Roger		102, Middlemiss View, Godmanchester, Huntingdon, Cambridgeshire, PE29 2...	01632 7
☐	Johnson, T	Mr	C C Instruments, East Town, Eastshire	01632 0
☐	Lelevre, Madame		20, rue des Pins, NANTES	
☐	Rajaratnam, A	Mr	63, Bellstone, East Town, Eastshire	01632 9
☐	Robinson, N	Ms	Johnson Bros Ltd, Chumley, Parkshire	01632 2
☐	Smyth, Linda	Mrs	East Town Bus Depot, Eastshire	01632 6
☐	Tamer, S.	Mrs	1, Mount Pleasant Road, East Town, Eastshire	01632 7
☐	Urquhart,	Mrs	53, Trembanwy, Radcliffe-on-Trent	01632 135

- From here, tick the records you wish to delete to highlight **Delete**.

Delete Unlinked Persons

 Delete

Number of unlinked persons: 12 Number selected: 4

☐	Name	Title	Home Address	Telephone
☒	Antas, Sergei			
☒	Chaplin, D.	Mr	East Town Council	01632 5
☐	Crane, S	Mrs	6, Western Drive, Wilverton, Rapshire	01632 1
☒	Grimwald, Harold	Mr		
☐	Hard, Roger		102, Middlemiss View, Godmanchester, Huntingdon, Cambridgeshire, PE29 2...	01632 7
☐	Johnson, T	Mr	C C Instruments, East Town, Eastshire	01632 0
☒	Lelevre, Madame		20, rue des Pins, NANTES	
☐	Rajaratnam, A	Mr	63, Bellstone, East Town, Eastshire	01632 9
☐	Robinson, N	Ms	Johnson Bros Ltd, Chumley, Parkshire	01632 2
☐	Smyth, Linda	Mrs	East Town Bus Depot, Eastshire	01632 6
☐	Tamer, S.	Mrs	1, Mount Pleasant Road, East Town, Eastshire	01632 7
☐	Urquhart,	Mrs	53, Trembarwy, Radcliffe-on-Trent	01632 135

3. Click **Delete**.
4. The following warning message appears. Select **Yes**.
5. Unlinked persons will then be deleted.

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 Do you wish to proceed with the permanent deletion of the selected unlinked persons?

Note: The delete routine may be time-consuming and once started, cannot be stopped.

NOTE: When deleting unlinked contacts and unlinked persons, it is recommended deleting in small batches to prevent SIMS from timing out (as it can be time consuming process).

Permanently Delete a Pupil/Student's Record

The ability to permanently delete a pupil's record is used when a duplicate record has been created in error and where a school has wanted to delete records of former pupils/students.

The time period after leaving the school when this is done varies and should follow the guidance from the Local Authority or other advice. To comply with the new GDPR legislation schools may now wish to delete different data at different time.

Delete a Pupil/Student

Note: This functionality is available to School Administrators only.

1. Select **Routines | Pupil/Student | Delete Pupil** and the **Locate Student** browser is displayed.
2. Either use the **Filter** boxes to find the pupil to be deleted or type the details in the fields and **Search**.
3. Highlight the student and double-click or click **Open**.

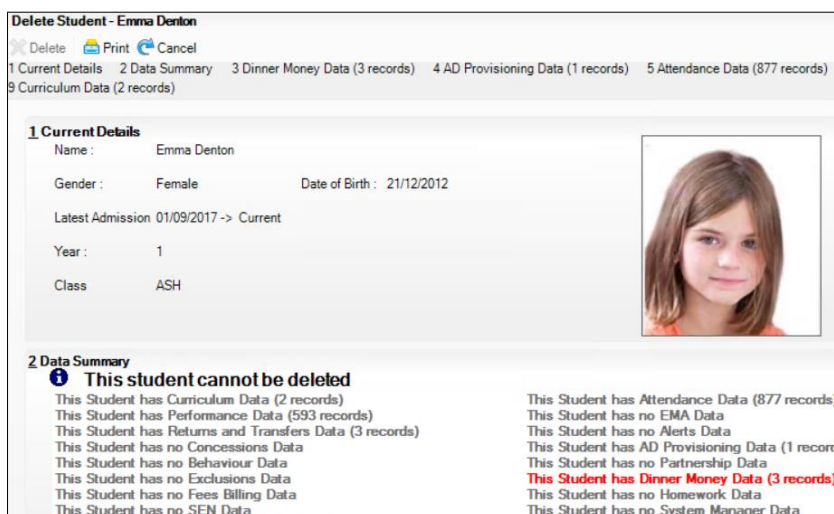
Delete Student

 Delete  Print  Cancel

The System is gathering the information on the selected student
You will have the opportunity to review and print this information
to help you decide if this is the student you wish to delete
please wait

NOTE: The operation of this routine is significantly different from other areas of the software. This is to distinguish the permanent deletion routine from other operations.

The pupil/student's record appears. The hyperlinks across the top show what information is available to enable you to check that you have the correct pupil/student and to present all the information held.



Delete Student - Emma Denton

Delete Print Cancel

1 Current Details 2 Data Summary 3 Dinner Money Data (3 records) 4 AD Provisioning Data (1 records) 5 Attendance Data (877 records) 6 Curriculum Data (2 records)

1 Current Details

Name : Emma Denton

Gender : Female Date of Birth : 21/12/2012

Latest Admission 01/09/2017 -> Current

Year : 1

Class : ASH

2 Data Summary

This student cannot be deleted

This Student has Curriculum Data (2 records)

This Student has Performance Data (593 records)

This Student has Returns and Transfers Data (3 records)

This Student has no Concessions Data

This Student has no Behaviour Data

This Student has no Exclusions Data

This Student has no Fees Billing Data

This Student has no SEN Data

This Student has Attendance Data (877 records)

This Student has no EMA Data

This Student has no Alerts Data

This Student has AD Provisioning Data (1 records)

This Student has no Partnership Data

This Student has Dinner Money Data (3 records)

This Student has no Homework Data

This Student has no System Manager Data

Data available may include:

- curriculum data – class memberships
- performance data – from Assessment
- returns and transfers data – included on a census, PLASC or CTF
- concessions data – related to admissions
- behaviour data – behaviour and achievement records
- exclusions data – exclusion information
- fees billing data – from fees billing, if licensed
- SEN data – SEN details
- attendance data – from attendance
- dinner money data – from Dinner Money.

The data available can be used to determine whether the pupil's details should be permanently deleted, for example if the pupil had been included in a census return it may be worth reconsidering whether the deletion is appropriate.

It is unlikely that there will be any data on SIMS for a pupil who has been incorrectly recorded. If a pupil has been recorded twice and this has only just been detected, these display panels may be useful to ensure that all the relevant data has been transferred to the correct pupil's record. In this example Emma has Dinner Money data that will need to be transferred to the correct record before the duplicate record can be deleted.

The **View** button on each panel will open the panel to display the details available.

4. When the various panels of information have been viewed the decision to delete may be taken.
5. Click **Delete** at the top of the screen if the decision has been made to delete the pupil.



6. A confirmation message is displayed. Click **Yes** to start the deletion process. There is no way to reverse this decision, except by a full restoration of the SIMS database from the most recent backup.

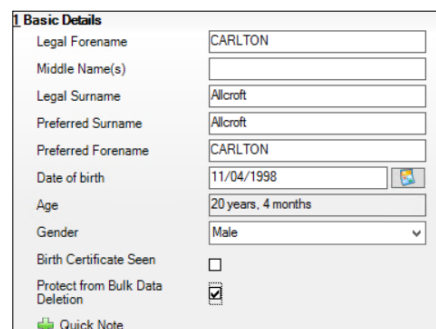
SIMS reports that it is carrying out the request and then reports when the process is completed.

Protect Pupils/Student from the Bulk Deletion Process

Note: pupils who have ever been SEN are excluded from bulk deletion by default.

A school may feel that it wishes to exclude certain pupils from the bulk deletion process for other specific pupils where the school wishes to retain their full record.

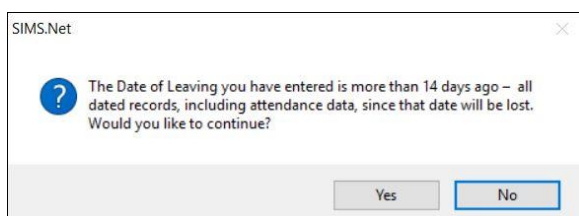
1. Select **Focus | Pupil | Pupil Details**.
2. Change the **Status** to **Leavers** and **Search** for and **Open** a pupil record.
3. **Panel 1: Basic Details** panel tick the **Protect from Bulk Data Deletion** checkbox.
4. Click **Save**.
5. Click **Yes** when prompted with the message below:



1 Basic Details

Legal Forename	CARLTON
Middle Name(s)	
Legal Surname	Alcroft
Preferred Surname	Alcroft
Preferred Forename	CARLTON
Date of birth	11/04/1998
Age	20 years, 4 months
Gender	Male
Birth Certificate Seen	☐
Protect from Bulk Data Deletion	☒

[Quick Note](#)



SIMS.Net

? The Date of Leaving you have entered is more than 14 days ago – all dated records, including attendance data, since that date will be lost. Would you like to continue?

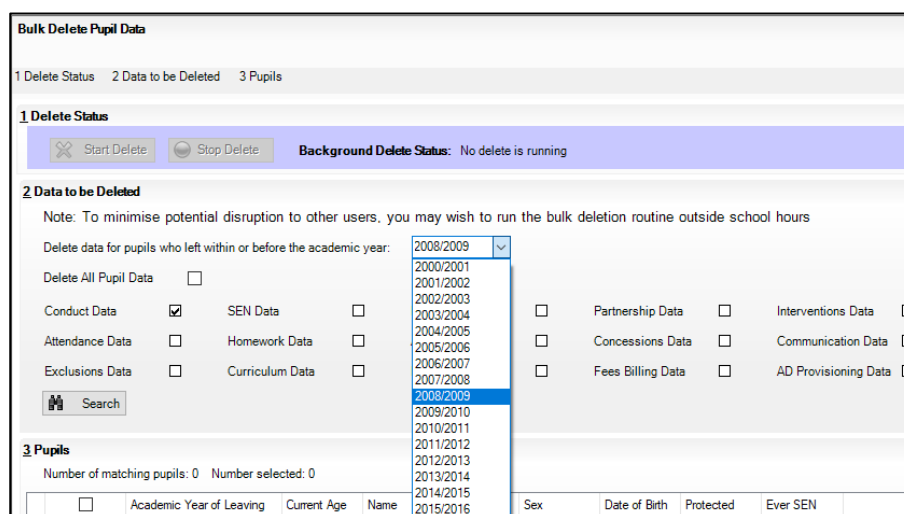
Yes No

Bulk Delete Pupil/Student Data

Note: This functionality is available to School Administrators only.

If the school wishes to delete all the **conduct data** for all the leavers. Only those who have left on or before 2014/15 can have data deleted as various aspects of SIMS require the more recent data, for example *Discover* behaviour graphs would require the conduct data.

1. Select **Routines | Pupil | Bulk Delete Pupil Data**.
2. In the drop-down list, select the academic year to **Delete data for pupils who left within or before the academic year**.
3. Tick the checkbox for the required data to be deleted eg. **Conduct**



Bulk Delete Pupil Data

1 Delete Status 2 Data to be Deleted 3 Pupils

1 Delete Status

Background Delete Status: No delete is running

2 Data to be Deleted

Note: To minimise potential disruption to other users, you may wish to run the bulk deletion routine outside school hours

Delete data for pupils who left within or before the academic year: 2008/2009

Delete All Pupil Data ☐

Conduct Data ☒ SEN Data ☐ Partnership Data ☐ Interventions Data ☐

Attendance Data ☐ Homework Data ☐ Concessions Data ☐ Communication Data ☐

Exclusions Data ☐ Curriculum Data ☐ Fees Billing Data ☐ AD Provisioning Data ☐

3 Pupils

Number of matching pupils: 0 Number selected: 0

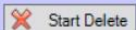
☐	Academic Year of Leaving	Current Age	Name	Sex	Date of Birth	Protected	Ever SEN
	2015/2016						

4. Click **Search**.

3 Pupils								
Number of matching pupils: 34 Number selected: 31								
☐	Academic Year of Leaving	Current Age	Name	Sex	Date of Birth	Protected	Ever SEN	
☐	2008/2009	25	Allcroft, CARLTON	Male	11/04/1998	Yes		
☒	2008/2009	25	Balley, MENA	Female	24/04/1998			
☒	2008/2009	25	BEALE, Manjeev	Male	21/04/1998			
☐	2008/2009	26	BECKFORD, Gumham	Male	25/11/1997		Yes	
☒	2008/2009	26	Beckford, Miles	Male	26/01/1998			
☒	2008/2009	26	Begum, BOB	Male	23/10/1997			
☒	2008/2009	26	BESTER, LO	Female	06/02/1998			

- Note: Carlton Allcroft is **greyed out** and cannot be selected, due to the **Protect from Bulk Data Deletion** check box ticked.
- Note: Gurnham Beckford is not selected. This is because he is **Ever SEN**. However, he could be selected by ticking the **Selection column** headed with the following symbol. 
- Click **Start Delete**. The process may take some time and can run in the background whilst other SIMS tasks are performed.

1 Delete Status

  **Background Delete Status:** No delete is running

- The following confirmation request message appears. Click **Continue** to proceed.

Bulk Data Deletion Agreement

As the Data Controller, it is the responsibility of the School to demonstrate compliance with the current Data Protection Legislation description of 'Lawful Basis for Processing'.

Capita ESS cannot be held responsible for the data you choose to delete.

Please note that where data is deleted, this may impact the accuracy of historic data reporting.

You are advised to take a backup of your data prior to deleting it from SIMS.

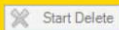
If you have any questions regarding your responsibilities in relation to the General Data Protection Regulations (GDPR) then you are best advised to review the information on the ICO website:

<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing>

☒ Please read the above statement fully and tick to confirm you agree in order to continue.

Continue **Cancel**

- Stop Delete** can be selected at any time and a message will inform you how much data has been deleted.

  **164 / 317** **Background Delete Status:** Stopped

Data to be Deleted

Note: To minimise potential disruption to other users, you may wish to run the bulk deletion routine outside school hours

Delete data for pupils who left within or before the academic year: 2014/2015

Conduct Data ☒ SEN Data ☐ Performance Data ☐ Partnership Data ☐

Attendance Data ☐ Homework Data ☐ Alerts Data ☐

Exclusions Data ☐ Curriculum Data ☐ EMA Data ☐

 Search

Pupils

Number of matching pupils: 362 Number selected: 317

☐	Academic Year of Leaving	Current Age	Name
☒	2008/2009	20	BEALE, Manjeev

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 The background delete task has been stopped.

164 / 317 pupils had data deleted successfully

OK

- Click **OK**.

Chapter 8 Permanently Delete Documents from the Document Management Server

Maintaining Orphaned Documents

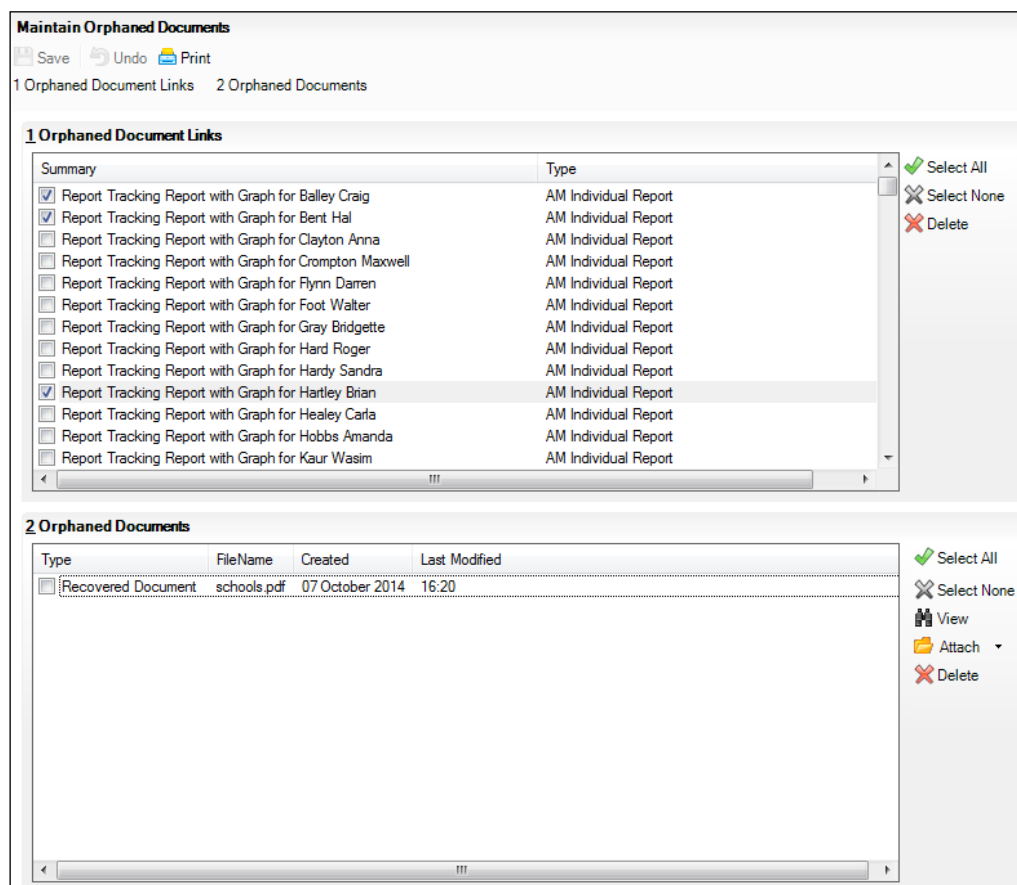
NOTE: This functionality is available to School Administrators only.

The Document Management Server has the capacity to contain a large number of diverse documents, from individual profiles and assessment reports, through to general letters to parents. It is also possible documents may become detached from their link to a person or organisation, making it impossible to trace documents back to their original source. This may occur because:

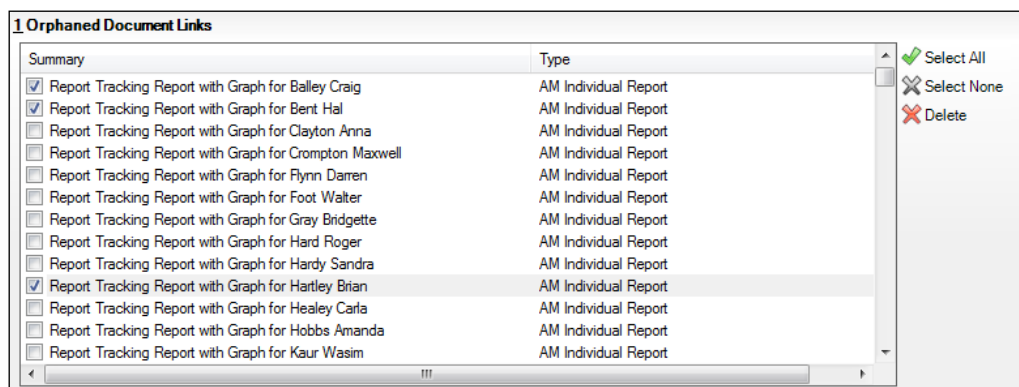
- The DMS was down when the document was selected for deletion such that only the link to the document was removed.
- Profiles and individual assessment reports have been superseded by a later version, but earlier versions still remain.

Such documents are referred to as orphaned documents. It is now possible to restore, recover (where possible) or delete orphaned documents.

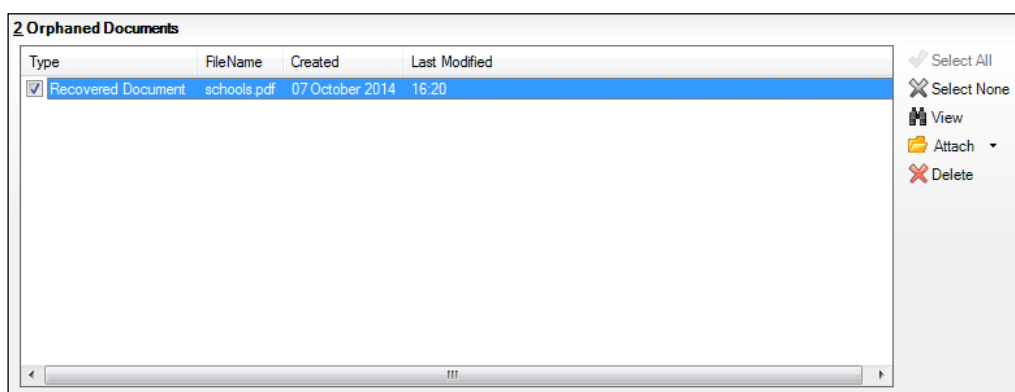
1. Select **Tools | Housekeeping | Document Management Server | Maintain Orphaned Documents** to display the **Maintain Orphaned Documents** page.



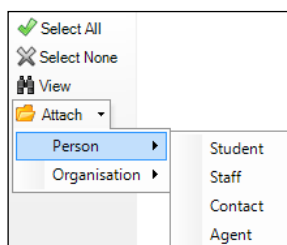
The **Orphaned Document Links** panel displays a list of any links that no longer have documents attached to them.



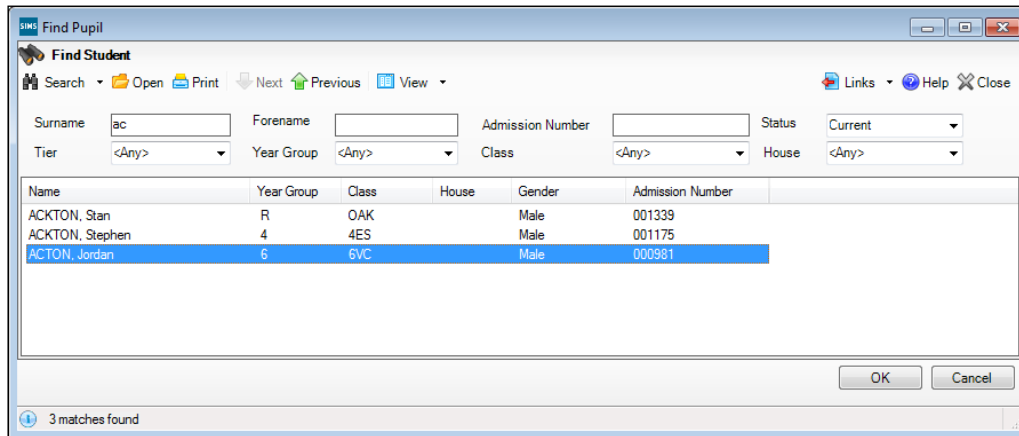
- Because the documents are no longer stored on the DMS, the links cannot be restored and therefore need to be removed. This is achieved by clicking **Select All**, then clicking **Delete**. Alternatively, individual links can be removed by selecting the adjacent check box, then clicking **Delete**.
- The **Orphaned Documents** panel displays any orphaned documents that are no longer linked to their original source. These documents are still stored on the DMS and as such, can often be re-attached to their original source if sufficient information is available.



- Select the check box adjacent to an individual orphaned document and click **View** to display the document contents. From the information contained in the document, it may be possible to determine the record the document was originally attached to.
- If sufficient information has been found to enable the document to be re-attached to its original source, click **Attach** and select the appropriate option from the drop-down list, eg. **Person | Pupil/Student**.



- The applicable browser is displayed enabling you to select the required person or organisation. For example, selecting **Person | Student** displays the **Find Pupil (or Student)** browser.



SIMS Find Pupil

Find Student

Search Open Print Next Previous View

Links Help Close

Surname: ac Forename: Admission Number: Status: Current

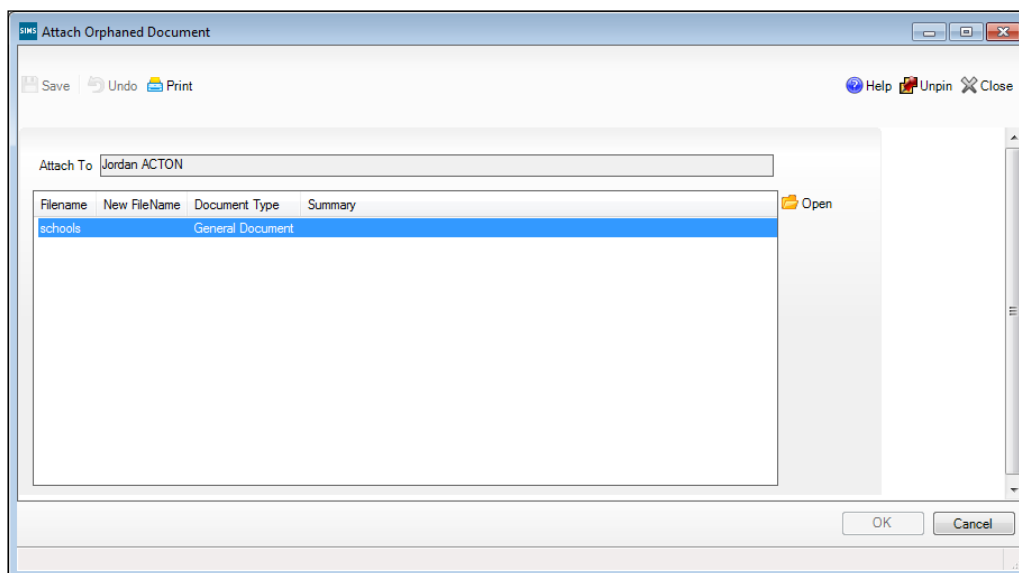
Tier: <Any> Year Group: <Any> Class: <Any> House: <Any>

Name	Year Group	Class	House	Gender	Admission Number
ACKTON, Stan	R	OAK		Male	001339
ACKTON, Stephen	4	4ES		Male	001175
ACTON, Jordan	6	6VC		Male	000981

OK Cancel

3 matches found

7. **Search** for and select the required person or organisation then click **OK** to select them/it and display the **Attach Orphaned Document** dialog.



SIMS Attach Orphaned Document

Save Undo Print Help Unpin Close

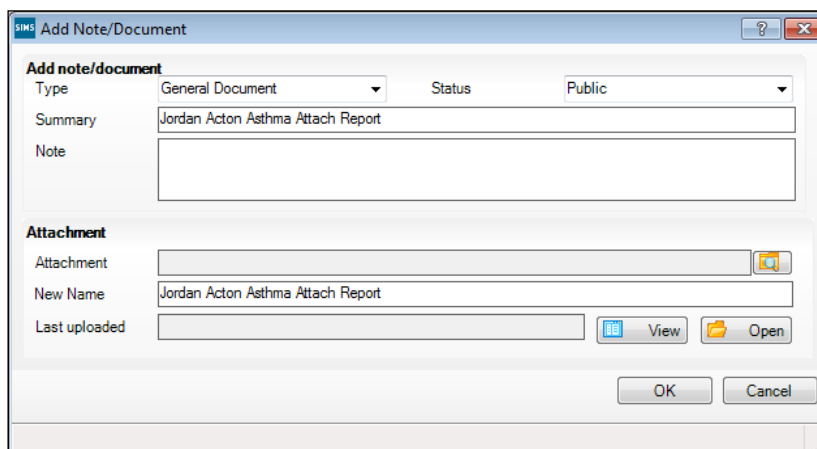
Attach To: Jordan ACTON

Filename	New FileName	Document Type	Summary
schools		General Document	

Open

OK Cancel

8. Highlight the filename of the orphaned document then click **Open** to display the **Add Note/Document** dialog.



SIMS Add Note/Document

Add note/document

Type: General Document Status: Public

Summary: Jordan Acton Asthma Attach Report

Note:

Attachment

Attachment: New Name: Jordan Acton Asthma Attach Report

Last uploaded: View Open

OK Cancel

9. Ensure the **Type** is selected from the drop-down list and a clear and concise **Summary** is entered.
10. Select the **Status** of the document from the drop-down list as per the following options:

Public – the document is available to all users with sufficient add/view/edit document permissions.

Private – the document is available only to you.

Confidential – the document is available to SIMS users with School Administrator or Senior Management Team permissions.

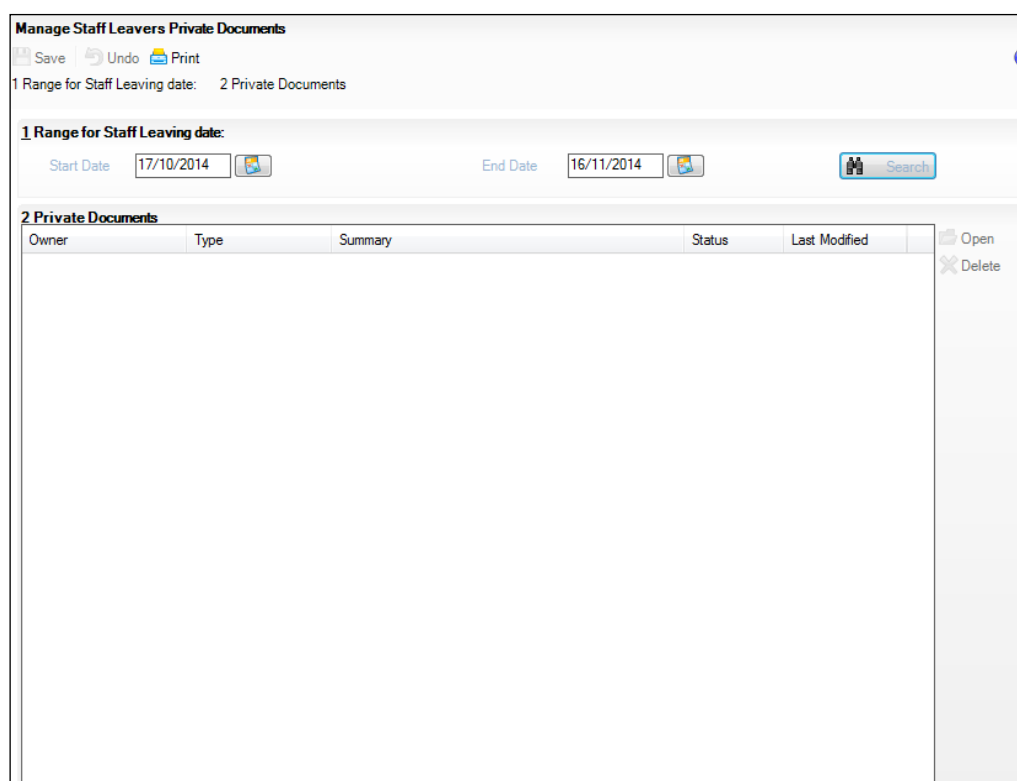
11. Enter a **Note** that clearly describes the contents of the document. This may help in future if the document subsequently becomes orphaned.
12. Enter a New Name for the document and click **OK** to return to the **Attach Orphaned Document** dialog.
13. Click **Save** on the **Attach Orphaned Document** dialog to re-attach the document.
14. Click **OK** to return to the **Maintain Orphaned Documents** page and repeat for any remaining orphaned documents.
15. Click **Save** on toolbar to complete the process.

Maintaining Staff Leavers Private Documents on SIMS

When staff leave your school, they may have attached documents within SIMS that have been marked as **Private**. As a consequence, no one else is able to access these documents.

This function enables School Administrators to identify such documents, view their content if required, then either delete the documents or amend the status to **Public** or **Confidential**.

1. Select **Tools | Housekeeping | Document Management Server | Maintain Private Documents of Staff Leavers** to display the **Maintain Staff Leavers Private Documents** page.



The **Start Date** and **End Date** default to dates to cover the last rolling month. These dates can be manually edited by entering required dates in dd/mm/yyyy format or by clicking the **Calendar** button and selecting the required date.

- Click **Search** to display any documents marked as private for staff who have left in the **Private Documents** panel.

2 Private Documents						
Owner	Type	Summary	Status	Last Modified		Open Delete
Grosvenor Gillian	Not Specified	Carl Brooks CV	Private	17/11/2014		
Grosvenor Gillian	Not Specified	My Statement for Disciplinary Hearing Aug 07	Private	17/11/2014		
Grosvenor Gillian	Letter	Resignation Letter	Private	17/11/2014		
Grosvenor Gillian	Student Medical Note	Counselling Session re: Bullying Incident	Private	17/11/2014		

- If you are sure that the document is no longer required, highlight the document name and click **Delete** to remove it.
- To view more detail of the document, select the document name then click **Open** to display the **Edit Note/Document** dialog.

SIMS Edit Note/Document: Carl Brooks CV

Edit note/document

Type: Not Specified Status: Private

Summary: Carl Brooks CV

Note:

Attachment

Attachment: carl_brooks_CV.docx

Last uploaded: Grosvenor Gillian 17/11/2014 11:58:00

Document Log

Date	Owner	Author of change
17/11/2014 11:56:00	Grosvenor Gillian	Grosvenor Gillian
17/11/2014 11:58:00	Grosvenor Gillian	Grosvenor Gillian

OK Cancel

- If you wish to retain the document and make it available to other users, you must select a different value from the **Status** drop-down list.

The alternative values are either **Public** (available to all SIMS users who have permissions to access the areas where the document is stored) or **Confidential** (available to users with School Administrator or Senior Management Team permissions only).

- If you want to check the content, the document can be viewed by clicking **View**.
- A copy of the document log can be printed by clicking **Print** in the **Document Log** panel.

The log includes the date and time the document was uploaded, the owner of the document and the name of any user who edited the document.

- Click **OK** to save any **Status** change and return to the **Manage Staff Leavers Private Documents** page.

2 Private Documents						
Owner	Type	Summary	Status	Last Modified		Open Delete
Grosvenor Gillian	Not Specified	Carl Brooks CV	Confidential	17/11/2014		
Grosvenor Gillian	Not Specified	My Statement for Disciplinary Hearing Aug 07	Private	17/11/2014		
Grosvenor Gillian	Letter	Resignation Letter	Private	17/11/2014		
Grosvenor Gillian	Student Medical Note	Counselling Session re: Bullying Incident	Private	17/11/2014		

- Any change in status is reflected in the **Status** column. Click **Save** on the toolbar to save any changes.

Chapter 9 Managing GDPR Requests

Introduction

In order to comply with GDPR requests, SIMS now includes the ability to run a report to provide the information held within the system on students/pupils and more recently also includes the ability to report on Staff/Contact/Person data.

Running the report leaves an audit trail which cannot be deleted and therefore should not be used to run a random report to see what it looks like.

Only SIMS Users with the **Data Protection Officer** permission can generate the **Person Data Output report**, which provides an output of specified data for a pupil/student, contact or member of staff recorded in SIMS. This can be used in conjunction with other reports and outputs to assist the user with the completion of Subject Access Requests.

The report contains a large amount of sensitive information held on the subject. As the **Data Controller**, it is the responsibility of the school's **Data Protection Officer** to thoroughly review the report output for accuracy and to redact any information they feel could cause data protection issues.

Information on redaction can be found on the ICO website <https://ico.org.uk/>

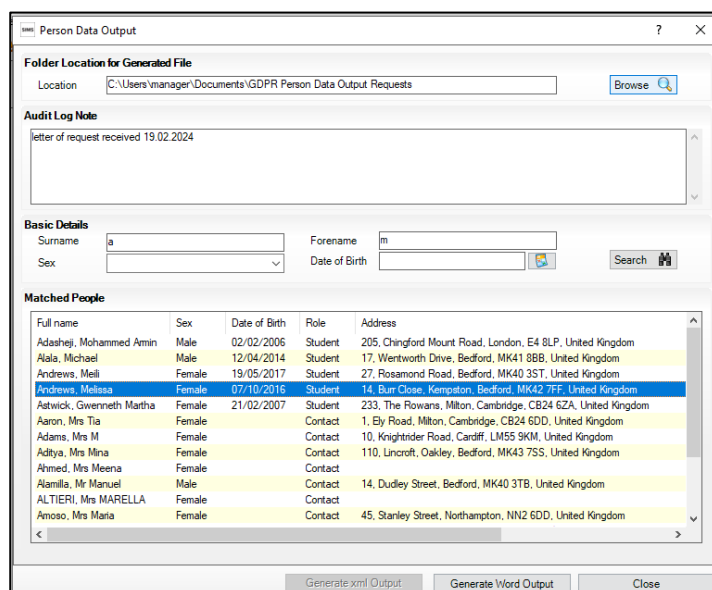
If requested as part of the Subject Access Request, additional information (eg. on attendance, fees, dinner money, etc.) can be obtained by running pre-defined reports via **Report | Run Report**.

IMPORTANT NOTES: The content of the report contains sensitive information that will no longer be protected by SIMS permissions. It is the school's responsibility to ensure its security.

As part of your housekeeping routines and to reduce the impact of a data breach on the DMS, it is recommended that you delete all orphaned documents via **Tools | Housekeeping | Document Management Server | Maintain Orphaned Documents** on a regular basis.

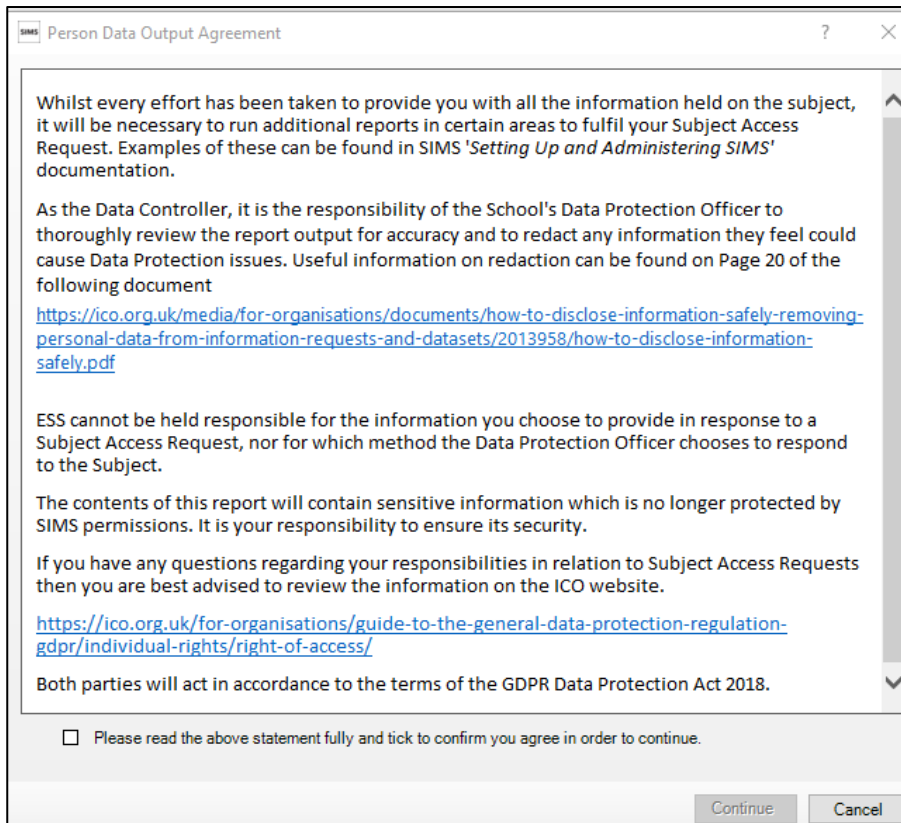
Run a Person Data Report

1. **Routines | Data Out | Person Data Output.**
2. Select **New**.



Full name	Sex	Date of Birth	Role	Address
Adasheji, Mohammed Amin	Male	02/02/2006	Student	205, Chingford Mount Road, London, E4 8LP, United Kingdom
Alala, Michael	Male	12/04/2014	Student	17, Wentworth Drive, Bedford, MK41 8BB, United Kingdom
Andrews, Meli	Female	19/05/2017	Student	27, Rosamond Road, Bedford, MK40 3ST, United Kingdom
Andrews, Melissa	Female	07/10/2016	Student	14, Bun Close, Kempston, Bedford, MK42 7FF, United Kingdom
Atwick, Gwenneth Martha	Female	21/02/2007	Student	233, The Rowans, Milton, Cambridge, CB24 6ZA, United Kingdom
Aaron, Mrs Tia	Female		Contact	1, Ely Road, Milton, Cambridge, CB24 6DD, United Kingdom
Adams, Mrs M	Female		Contact	10, Knight rider Road, Cardiff, LM55 9KM, United Kingdom
Aditya, Mrs Mina	Female		Contact	110, Lincroft, Oakley, Bedford, MK43 7SS, United Kingdom
Ahmed, Mrs Meena	Female		Contact	
Alamilia, Mr Manuel	Male		Contact	14, Dudley Street, Bedford, MK40 3TB, United Kingdom
ALTIERI, Mrs MARELLA	Female		Contact	
Amoso, Mrs Maria	Female		Contact	45, Stanley Street, Northampton, NN2 6DD, United Kingdom

3. In the **Person Data Output** screen, browse to the correct folder.
4. Add an **Audit Log Note** if required eg. enter requested date.
5. Select and highlight the relevant person.
6. Select **Generate Word Output**.
7. Read the **Person Data Output Agreement** and tick the box to confirm. Select **Continue**.



The screenshot shows a dialog box titled "Person Data Output Agreement" with a SIMS logo in the top left corner. The dialog contains several paragraphs of text explaining the agreement, including references to SIMS documentation and the ICO website. At the bottom, there is a checkbox labeled "Please read the above statement fully and tick to confirm you agree in order to continue." and two buttons: "Continue" and "Cancel".

Person Data Output Agreement

Whilst every effort has been taken to provide you with all the information held on the subject, it will be necessary to run additional reports in certain areas to fulfil your Subject Access Request. Examples of these can be found in SIMS 'Setting Up and Administering SIMS' documentation.

As the Data Controller, it is the responsibility of the School's Data Protection Officer to thoroughly review the report output for accuracy and to redact any information they feel could cause Data Protection issues. Useful information on redaction can be found on Page 20 of the following document
<https://ico.org.uk/media/for-organisations/documents/how-to-disclose-information-safely-removing-personal-data-from-information-requests-and-datasets/2013958/how-to-disclose-information-safely.pdf>

ESS cannot be held responsible for the information you choose to provide in response to a Subject Access Request, nor for which method the Data Protection Officer chooses to respond to the Subject.

The contents of this report will contain sensitive information which is no longer protected by SIMS permissions. It is your responsibility to ensure its security.

If you have any questions regarding your responsibilities in relation to Subject Access Requests then you are best advised to review the information on the ICO website.
<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/individual-rights/right-of-access/>

Both parties will act in accordance to the terms of the GDPR Data Protection Act 2018.

☐ Please read the above statement fully and tick to confirm you agree in order to continue.

Continue Cancel

8. The report will open in Word, see the following examples.



Student Output Report Example

Melissa Andrews - Student

Report Date: 19/02/2024 15:17

Basic Details

Legal Forename	Melissa
Legal Surname	Andrews
Preferred Forename	Melissa
Preferred Surname	Andrews
Date of Birth	07/10/2016
Role(s)	Pupil, Applicant
Sex	Female
Pronoun(s)	She / Her / Her / Hers / Herself
Pronouns: Only Use in School	Yes
Birth Certificate Seen	Yes
Photograph on Record	Yes

Registration Details

Admission Number	001782
Admission Date	03/09/2020
UPN	QB23299920003
Class	2GH
Year Group	Year 2
Year Taught In	Curriculum Year 2
Student Status	On roll
Enrolment Status	Single Registration
Boarder Status	Not a Boarder
Attendance Mode	All Day

Enrolment Status History

Changed To	Student Date of Change	Notes
Single Registration	03/09/2020	Date of Admission

Part Time Details

Start Date	End Date	Description
03/09/2020	31/08/2021	Part Time

Addresses

Addresses

Address Type	Address	Country	UPRN	Start Date
Home	14 Burr Close, Kempston, Bedford, MK42 7FF	United Kingdom	10024231429	05/06/2020

Telephone / Fax Numbers

Device	Telephone Number	Location	Main	Primary Telephone
Telephone	01632 423470		No	Yes
Telephone	07333 359022	Mobile	Yes	No

Melissa Andrews - Student

Page 1 of 9

19/02/2024 15:17

Email Addresses

Email Address	Location	Main	Primary Email
Andrews@example.com	Home	Yes	Yes

Parent / Contact Information

Name	Relationship	Priority	Parental Responsibility	Court Order
Mr Robin Andrews	Father	1	Yes	No
Ms Beatrice Andrews	Mother	1	Yes	No

Meal Patterns

Start Date	Mon	Tue	Wed	Thu	Fri
06/09/2021	School Meal	School Meal	School Meal	School Meal	School Meal

Medical Details

Emergency Consent Given
No

Medical Practice

Medical Practice	Address
De Parys Medical Centre	5A De Parys Avenue, Bedford, United Kingdom, MK40 2TX

Ethnic / Cultural Details

Ethnicity	Ethnic Data Source	First Language	First Language Source	Religion	National Identity	Home Language	Country of Birth
White - English	Provided by the parent	English	Provided by the parent	No Religion	English	English	United Kingdom

Nationality and Passport Details

Nation
United Kingdom

Proficiency in English

Date of Assessment	Level
21/09/2020	Fluent

Additional Information

Meals	Modes of Travel	LA Provided Transport	Uniform Allowance
School Meal	Walk	No	No

Linked Agencies

Agency Name	Type	Start Date
De Parys Medical Centre	Medical Centre	27/11/2019

Achievement Details

Date	Type	Activity Type	Points (incl Add Types)*	Award Given	Date of Award	Parents/Carers Informed
18/10/2023	Academic Achievement	Numeracy	1	Certificate	18/10/2023	No
09/10/2023	Star of the Week	Numeracy	5	Certificate	09/10/2023	No
28/09/2023	Star of the Week	Numeracy	5	Certificate	28/09/2023	No
25/09/2023	Star of the Week	Numeracy	5	Certificate	25/09/2023	No
19/10/2022	Excellent Effort	Technology	1	Commended	19/10/2022	No
21/09/2022	Star of the Week	Art	5	Certificate	21/09/2022	No
10/09/2021	Excellent Effort	Art	1			No
16/10/2020	Star of the Week		5			No

Additional Achievement Details

Date	Type	Comments
18/10/2023	Academic Achievement	You linked all the right numbers to how many objects there were in your Worksheet images. 10/10 correct answers. Well done.
09/10/2023	Star of the Week	Using the 2 times table you recently learnt you completed 12/12 correct answers in 10 mins. Well done. Keep up the good work.

Parental Consent

Consent Type
Copyright Permission, Internet Access, Photograph Student, Sex Education, Data Exchange, School Visit

Group Memberships

Group Type	Group Name	Start Date	End Date
Boarder Status	Not a Boarder	03/09/2020	
Class	2GH	01/09/2023	30/08/2024
Class	PINE	05/09/2022	31/08/2023
Class	ASH	01/09/2022	04/09/2022
Class	ASH	02/09/2021	31/08/2022
Class	PM	03/09/2020	01/09/2021
Ethnic Data Source	Provided by the parent	03/09/2020	
Ethnicity	White - English	03/09/2020	
First Language	English	03/09/2020	
First Language Source	Provided by the parent	21/09/2020	
Home Language	English	03/09/2020	

Additional Behaviour Details

Date	Type	Comments
25/09/2023	Homework	Spellings had clearly not been taken home all week. This is a year 2 requirement.

Assessment (CES defined): Academic Year 2022/2023

Aspect Name	Result Date	Result Set	Type	Result
Phonics Screening Check Grade	15/06/2023	Phonics Check Year 1	Grade	Wa
Phonics Screening Check Mark	15/06/2023	Phonics Check Year 1	Marks-Integer	36
Phonics Screening Threshold Year 1	15/06/2023	Phonics Check Year 1	Grade	32

Assessment (CES defined): Academic Year 2021/2022

Aspect Name	Result Date	Result Set	Type	Result
EYF Expected in all 17 ELGs	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD Achieved	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD Com & Lang Achieved	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD Com & Lang Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	2
EYF GLD LIT Achieved	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD LIT Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	3
EYF GLD MAT Achieved	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD MAT Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	2
EYF GLD PHY Achieved	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD PHY Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	2
EYF GLD PSE Achieved	11/05/2022	Early Years Foundation Stage	Grade	N
EYF GLD PSE Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	3
EYF GLD Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	12
EYF Total Pts	11/05/2022	Early Years Foundation Stage	Marks-Integer	17

Aspect Name	Result Date	Result Set	Type	Result
EYF: Past and Present	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: Past and Present	11/05/2022	School Assessment - EYFS	Grade	1
EYF: People, Culture and Communities	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: People, Culture and Communities	11/05/2022	School Assessment - EYFS	Grade	1
EYF: Self-Regulation	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: Self-Regulation	11/05/2022	School Assessment - EYFS	Grade	1
EYF: Speaking	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: Speaking	11/05/2022	School Assessment - EYFS	Grade	1
EYF: The Natural World	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: The Natural World	11/05/2022	School Assessment - EYFS	Grade	1
EYF: Word Reading	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: Word Reading	11/05/2022	School Assessment - EYFS	Grade	1
EYF: Writing	11/05/2022	Early Years Foundation Stage	Grade	1
EYF: Writing	11/05/2022	School Assessment - EYFS	Grade	1
CL Reception Statement 1	13/09/2021	Year R Autumn Baseline	Grade	D
CL Reception Statement 10	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 11	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 12	13/09/2021	Year R Autumn Baseline	Grade	D
CL Reception Statement 13	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 14	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 15	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 16	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 17	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 2	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 3	13/09/2021	Year R Autumn Baseline	Grade	E
CL Reception Statement 4	13/09/2021	Year R Autumn Baseline	Grade	E



Person Output Report Example

Alisa Abbas - Staff

Report Date: 28/03/2018 12:48

Basic Details

Title	Mrs
Legal Forename	Alisa
Legal Surname	Abbas
Preferred Forename	Alisa
Preferred Surname	Abbas
Gender	Female
Photograph on Record	No

Personal Details

Date of Birth	Ni Number	Ethnicity
08/03/1975	WE-89-84-16-A	Asian or Asian British, Bangladeshi

Addresses

Address Type	Address	Country	Start Date
Home	10 Mount View, <u>Greenhills, Parkshire</u>	United Kingdom	08/05/2017

Telephones

Device	Location	Number	Main	Primary
Telephone	Home	01234 417852	Yes	Yes

Professional

HLTA Status	TA Status
No	No

Employment Details

Teaching Staff
No

Employment Dates

Employment Start Date
08/05/2017

Checks

Check	Clearance Date
DBS Check	08/05/2017

Contract Id 56 - NJC - APT & C Staff - Start Date: 08/05/2017

Service term	NJC - APT & C Staff
Employment Type	Permanent

Post Reference	Midday Supervisor
Post Category	Not required for Statutory Return
Contract Start Date	08/05/2017
Financial Subgroup	Midday Supervisors
Contract/Payroll Number	PR326598
Increment Date	01/04
Ni Contracted	Out
Leave Entitlement	0.0000
Hours/Week	4.0000
Weeks/Year	42.0000
FTE	0.1081
Pro rata	0.8059
Safeguarded Salary	No
Pay Factor	0.0871
Origin	Not known
Is an Apprentice	No

Salary records for Contract Id 56 - NJC - APT & C Staff - Start Date: 08/05/2017

Scale	Scale 1
Start date	08/05/2017
Point	6.0
Annual Salary	15014.00
FTE	0.1081
Actual Salary (Annual Salary*FTE)	1307.40
Superannuation	Yes
Ni Status	Yes
Regional Pay Spine	Rest of England

Roles for Contract Id 56 - NJC - APT & C Staff - Start Date: 08/05/2017

Role	Start Date
Midday Assistant	08/05/2017

Contract Id 57 - NJC - APT & C Staff - Start Date: 08/05/2017

Service term	NJC - APT & C Staff
Employment Type	Permanent
Post Reference	Cleaner
Post Category	Not required for Statutory Return
Contract Start Date	08/05/2017
Financial Subgroup	Cleaners
Contract/Payroll Number	PR326598
Increment Date	01/04
Ni Contracted	Out
Leave Entitlement	0.0000
Hours/Week	5.0000
Weeks/Year	42.0000

Chapter 10 Delete Staff Records

Introduction

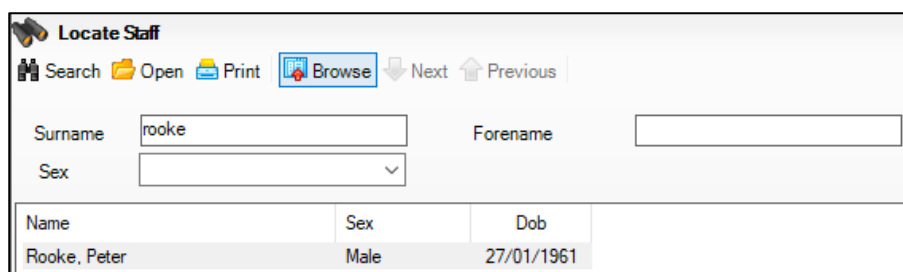
Deleting any staff records should be carried out using **extreme caution** because the audit trail of data amended in SIMS will be lost.

Where a duplicate staff record has been created, all the data must be transferred to one record and the other record deleted, however, this may not always be possible.

A typical scenario maybe where a SIMS User has been created on Systems Manager but the user details were not linked to the staff record from the matched records.

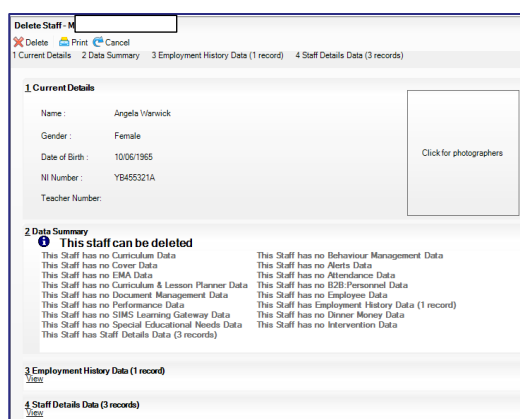
Delete a Staff Record

- After removing as much information as possible from the unwanted staff record ensure the:
 - SWR flag is not ticked.
 - All information relating to contracts is deleted, (ensure that these are properly recorded elsewhere).
 - All Employment check information is removed.
 - Employment start date is cleared.
 - Address and next of kin information is removed.
- Once information has been removed as possible, go to: **Routines | Staff | Delete staff**
- Search** for member of staff. On double clicking on staff name, SIMS will locate all records relating to this staff member. This will take a few moments whilst SIMS checks whether you can delete this person's record.



Name	Sex	Dob
Rooke, Peter	Male	27/01/1961

- If the staff record can be deleted, then SIMS will display the following message in the Data Summary panel ***"This staff can be deleted"***.



1 Current Details

Name: Angela Vianwick
 Gender: Female
 Date of Birth: 10/06/1965
 NI Number: YB455321A
 Teacher Number:

2 Data Summary

This staff can be deleted

This Staff has no Curriculum Data
 This Staff has no Cover Data
 This Staff has no EMA Data
 This Staff has no Curriculum & Lesson Planner Data
 This Staff has no Document Management Data
 This Staff has no Performance Data
 This Staff has no SIMS Learning Gateway Data
 This Staff has no Special Educational Needs Data
 This Staff has Staff Details Data (3 records)

This Staff has no Behaviour Management Data
 This Staff has no Alerts Data
 This Staff has no Attendance Data
 This Staff has no IGIS Personnel Data
 This Staff has no Employee Data
 This Staff has Employment History Data (1 record)
 This Staff has no Driver Money Data
 This Staff has no Intervention Data

3 Employment History Data (1 record)

4 Staff Details Data (3 records)

- Use **Delete** to delete this staff record.



Unable to Delete a Staff Record

If you are unable to delete the staff record, the Data Summary will display the message ***"This staff record cannot be deleted"***.

It is necessary to work through each set of records and delete these from the staff member, if possible, before trying to delete the record again.

In some instances it will not be possible to delete all of the records. If these records cannot be deleted, it will not be possible to delete the member of staff.

In this instance it will be necessary to **flag** the record so that it will not be selected in future.

To flag a record to be avoided in future, then:

- Put **ZZZ** in front of the surname of the individual.
- Set the date of birth to 01/01/1900, if you haven't already done so.
- Ensure that the SWR flag is not ticked.
- Delete any remaining data on the record.

Where Both a Contact and a Staff Record Exists

Where both a contact and a staff record exist separately for an individual, it is important that only one record remains on the SIMS system. It is recommended that the staff record is retained and the contact record deleted. Don't forget to transfer any information you wish to retain to the staff record.

Unfortunately there is no simple way of identifying duplicated records within SIMS in this instance. Therefore if you have a member of staff who is also a contact or a contact of other children at the school, you must check to see if their record is duplicated by looking at the contacts within SIMS:

Focus | Person | Contacts

To remove the contact record, follow the procedures for deleting a duplicate contact as described in this document.

Once the contact record has been deleted then it is important that the staff record is associated with the child. Use the **Panel 5: Family/links** hyperlink from the student record to associate the child with their parent/contact.

Make Staff Leavers Inactive Users in Systems Manager

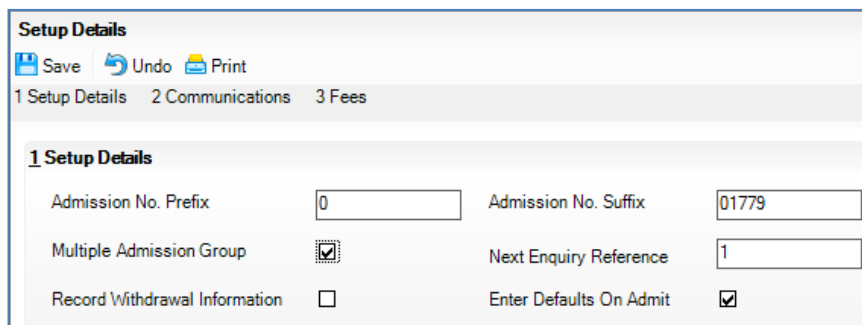
Once staff leave, their account must be made **inactive** in Systems Manager.

1. **Focus | Systems Manager | Manage Users**
2. Search and Open the Users Record
3. **Panel 2: Login Details** Untick the **Active** box.
4. **Save** the changes.

Chapter 11 The Admissions Module

Enable Multiple Admission Groups

1. Select **Tools | Admission | Defaults**.
2. Tick **Multiple Admission Group** and **Save** settings.
3. **Close SIMS** and log in to active **Multiple Admission Groups**



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

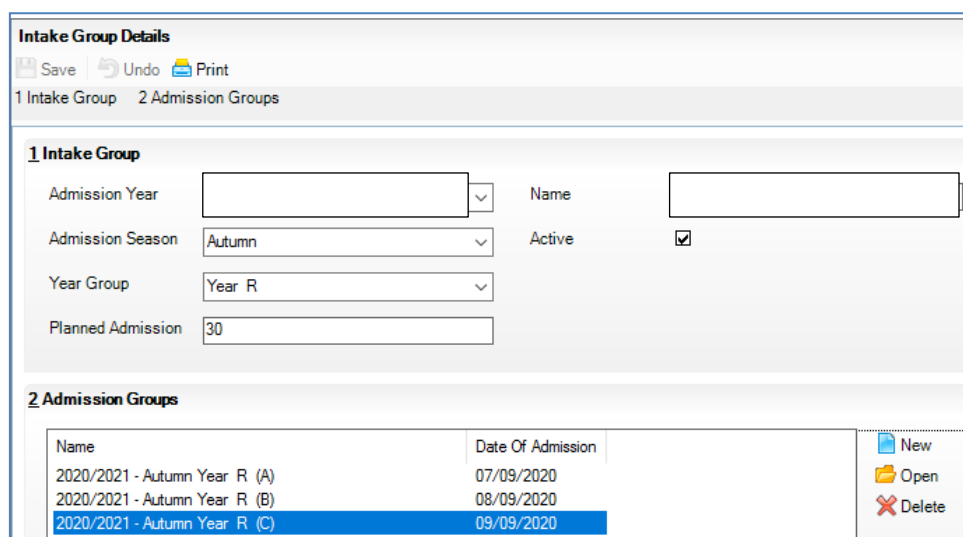
Admission records for applicants not admitted on roll, and who the school have no need to keep the data for, can be deleted.

Historical Admission Groups can also be deleted.

Add Multiple Admission Groups

Routines | Admissions | Admissions Group | Set Up

1. **Search** for the **Intake Group** you wish to add another admission group to.
2. **Open** the Intake Group



3. From **Panel 2: Admission Groups**, click **New** to display the **Add Admission Group** dialog.
4. Enter a **Name** (this must be different to the Intake).

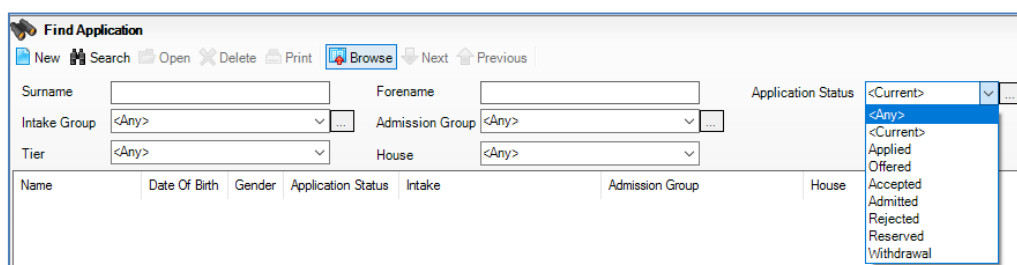
- Group name, even if just by character spacing) for the admission group, together with the **Date of Admission**. Alternatively, click the **Calendar** and select the required date.
- Click **OK** to add the admission group and return to the **Intake Group Details** page.
If any further admission groups are required, click **New** and repeat steps 1 and 2.

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

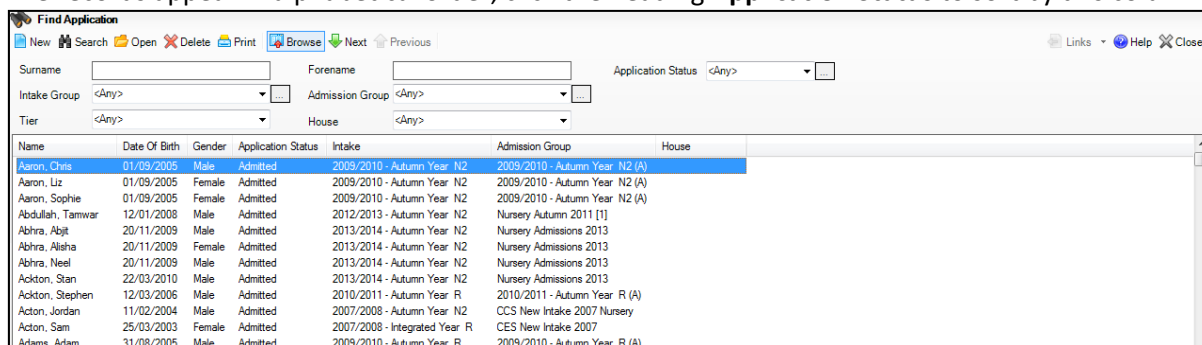
- Click **Save** to create the intake and admission groups.
- Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

Tidy Admission Records

Focus | Admission | Application



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



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

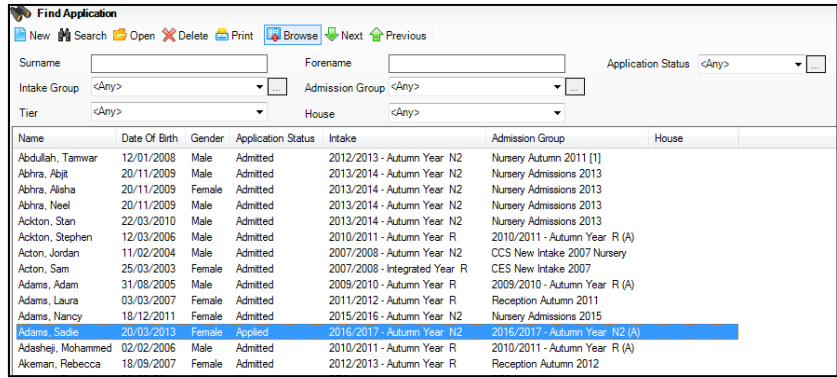
NOTES:

Records with a status of **Admitted** must be retained.

Applicant Records with **future admission dates** with a status of **Applied**, **Offered** or **Accepted** must be retained.

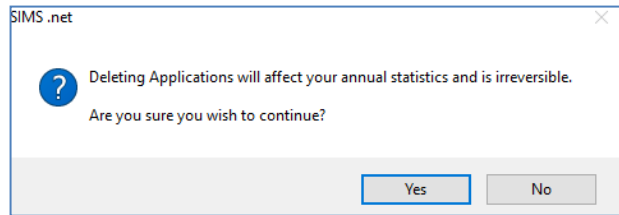
All other records can be deleted.

4. Highlight the record(s) to delete.
5. Click **Delete** at the top of the screen.



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

6. Click **Yes** in the pop up window.
7. Repeat this process until all unwanted records are removed from the system.



Deleting Applications will affect your annual statistics and is irreversible.
Are you sure you wish to continue?

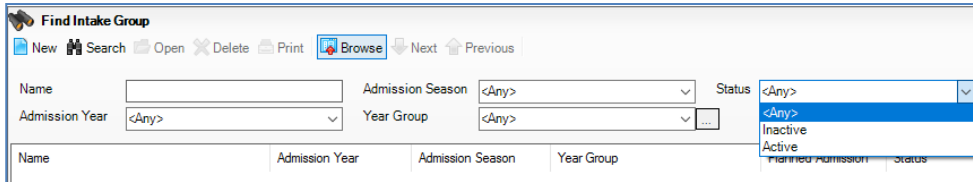
Yes No

Tidy Admission Groups

Once the Admission Records are tidied, you can tidy the Admission Groups.

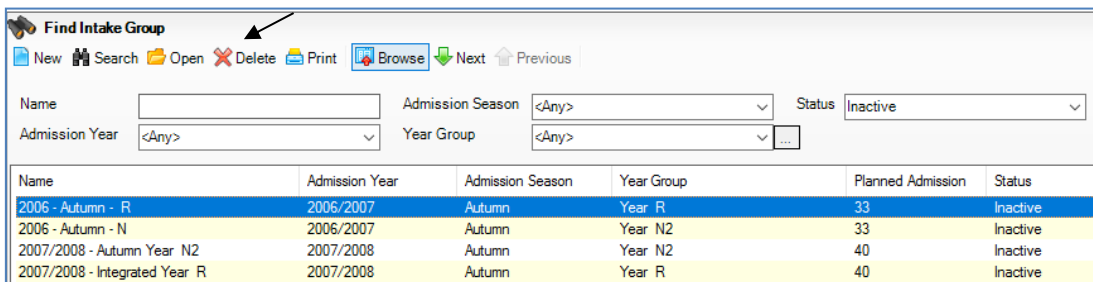
Routines | Admission | Admission Groups | Setup

1. Click the **Status** dropdown and select **<Any>**.



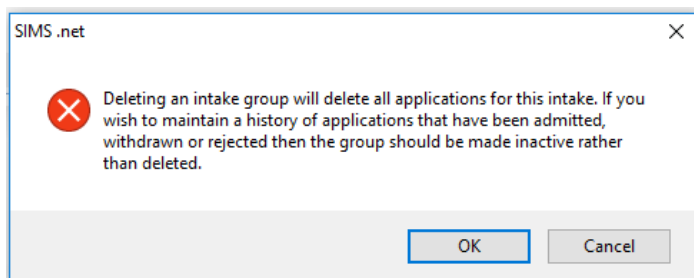
Name	Admission Year	Admission Season	Year Group
2006 - Autumn - R	2006/2007	Autumn	Year R
2006 - Autumn - N	2006/2007	Autumn	Year N2
2007/2008 - Autumn Year N2	2007/2008	Autumn	Year N2
2007/2008 - Integrated Year R	2007/2008	Autumn	Year R

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



Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2006 - Autumn - R	2006/2007	Autumn	Year R	33	Inactive
2006 - Autumn - N	2006/2007	Autumn	Year N2	33	Inactive
2007/2008 - Autumn Year N2	2007/2008	Autumn	Year N2	40	Inactive
2007/2008 - Integrated Year R	2007/2008	Autumn	Year R	40	Inactive

6. Click **OK** in the pop up window.



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

OK Cancel

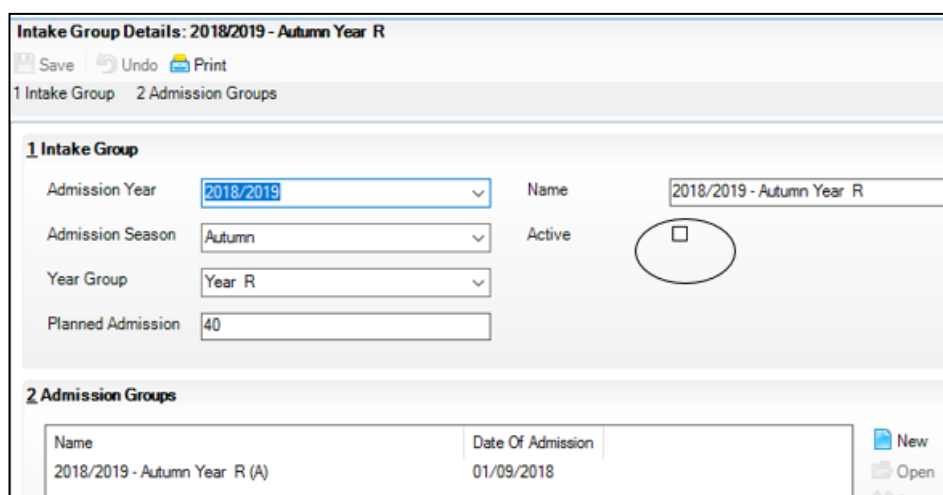
NOTE:

Admission Groups cannot be deleted if there are current applications associated with it. This should be resolved by tidying Admission records.

If you are still unable to delete an historic Admission Group you will need to make it **Inactive**.

Make Admission Groups Inactive

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



Intake Group Details: 2018/2019 - Autumn Year R

Save Undo Print

1 Intake Group 2 Admission Groups

1 Intake Group

Admission Year: 2018/2019 Name: 2018/2019 - Autumn Year R

Admission Season: Autumn Active: ☐

Year Group: Year R

Planned Admission: 40

2 Admission Groups

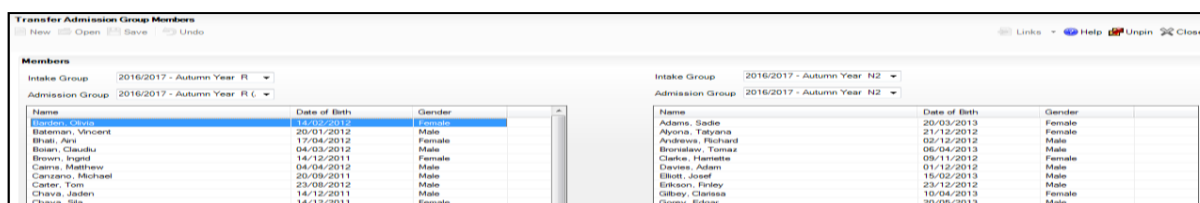
Name	Date Of Admission
2018/2019 - Autumn Year R (A)	01/09/2018

New Open

Transfer Applications between Intake Groups

Routines | Admission | Admission Groups | Transfer Applications

This will open a page which is split into two panels.



Transfer Admission Group Members

New Open Save Undo

Links Help Unpin Close

Members

Intake Group: 2016/2017 - Autumn Year R

Admission Group: 2016/2017 - Autumn Year R (A)

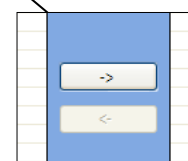
Name	Date of Birth	Gender
Adams, Sade	20/03/2013	Female
Alyson, Taziana	21/12/2012	Female
Andrews, Richard	02/12/2012	Male
Bronkley, Tomas	06/04/2013	Male
Clarke, Harlette	09/11/2012	Female
Davies, Adam	01/12/2012	Male
Elliott, Josef	15/02/2013	Male
Erkson, Felley	23/12/2012	Male
Gilbey, Clarissa	10/04/2013	Female
Gorey, Edgar	20/05/2013	Male

Intake Group: 2016/2017 - Autumn Year N2

Admission Group: 2016/2017 - Autumn Year N2

Name	Date of Birth	Gender
Adams, Sade	20/03/2013	Female
Alyson, Taziana	21/12/2012	Female
Andrews, Richard	02/12/2012	Male
Bronkley, Tomas	06/04/2013	Male
Clarke, Harlette	09/11/2012	Female
Davies, Adam	01/12/2012	Male
Elliott, Josef	15/02/2013	Male
Erkson, Felley	23/12/2012	Male
Gilbey, Clarissa	10/04/2013	Female
Gorey, Edgar	20/05/2013	Male

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

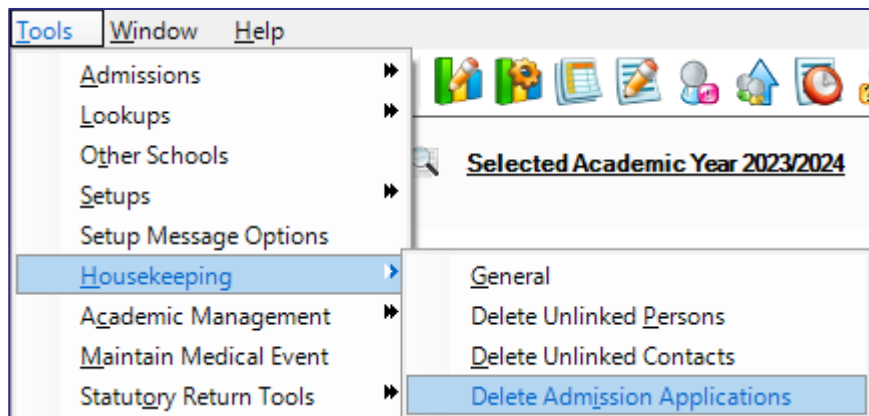


NOTE: Pupils can be moved in either direction using the up and down arrow.

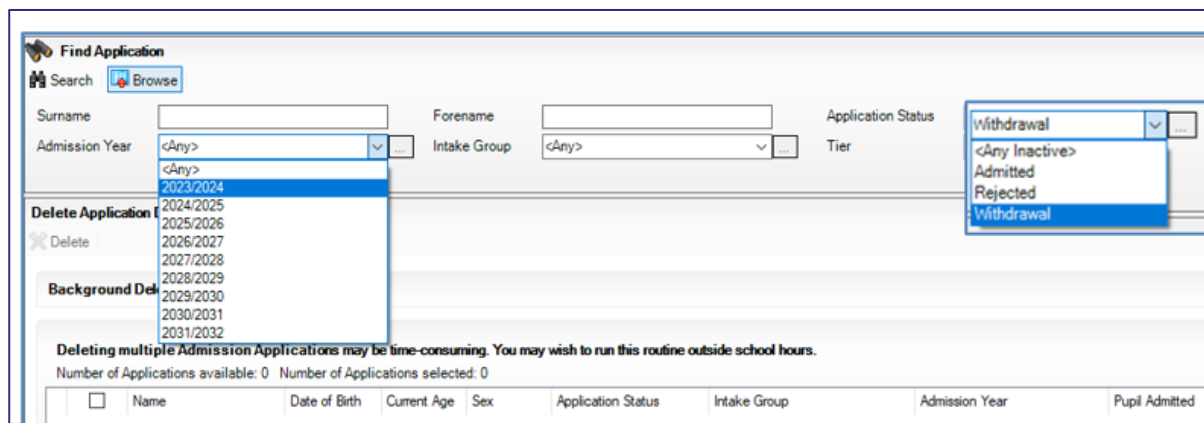
Bulk Delete Application Data

It is possible to perform a bulk deletion of application records. All data (except where fees, deposits or dinner money exists) will be available for deletion.

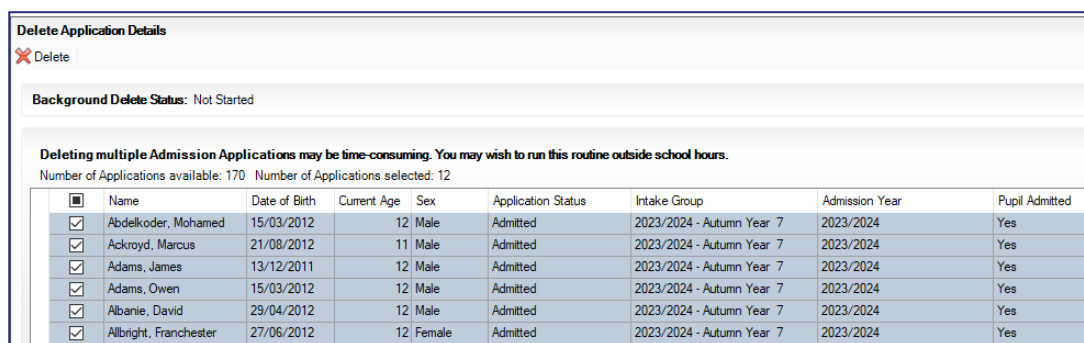
Tools | Housekeeping | Delete Admission Applications



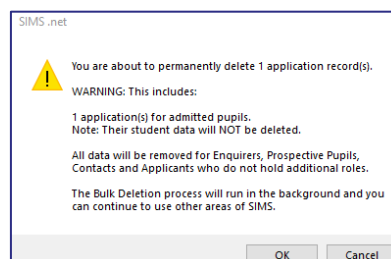
1. Select the criteria for deletion eg. Admission Year, Application Status etc and select **Search**.



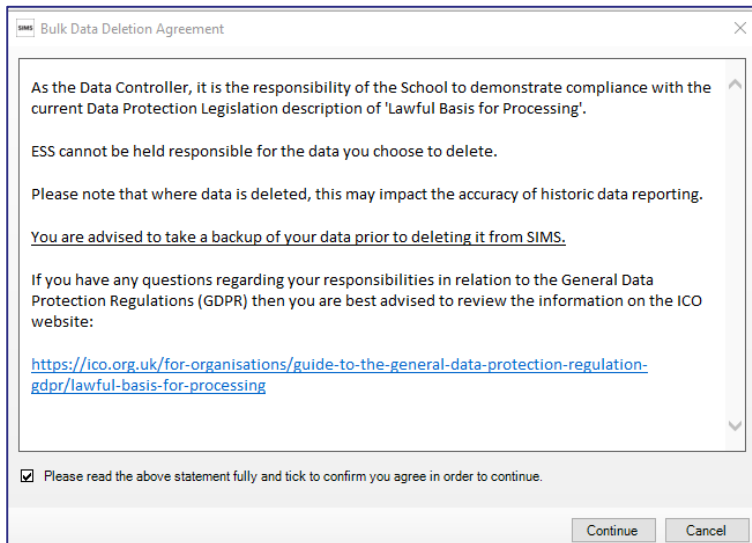
2. From the **Delete Application Details** screen, highlight and tick the students to be deleted.
3. Select **Delete**.



4. A warning message will be displayed, click **OK**.



5. The **bulk data deletion agreement** notice will appear. Tick to state agreement and click **OK**.



Bulk Data Deletion Agreement

As the Data Controller, it is the responsibility of the School to demonstrate compliance with the current Data Protection Legislation description of 'Lawful Basis for Processing'.

ESS cannot be held responsible for the data you choose to delete.

Please note that where data is deleted, this may impact the accuracy of historic data reporting.

You are advised to take a backup of your data prior to deleting it from SIMS.

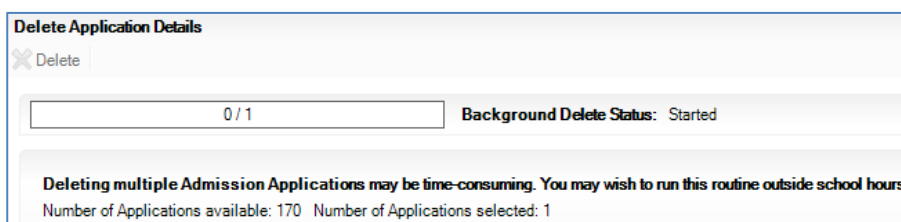
If you have any questions regarding your responsibilities in relation to the General Data Protection Regulations (GDPR) then you are best advised to review the information on the ICO website:

<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing>

☒ Please read the above statement fully and tick to confirm you agree in order to continue.

Continue Cancel

6. The deletion will start.



Delete Application Details

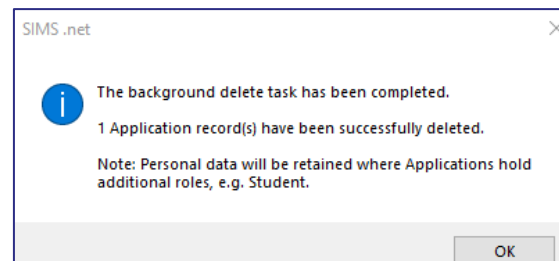
Delete

0 / 1 Background Delete Status: Started

Deleting multiple Admission Applications may be time-consuming. You may wish to run this routine outside school hours.

Number of Applications available: 170 Number of Applications selected: 1

7. Notification will show when the task has been completed. Select **OK**.



SIMS .net

The background delete task has been completed.

1 Application record(s) have been successfully deleted.

Note: Personal data will be retained where Applications hold additional roles, e.g. Student.

OK

Note: Deleting multiple admission applications may be time-consuming. It is recommended to run outside of school hours or when all users are logged out of SIMS.

Application Bulk Delete Audit Report

The application bulk delete data audit option is available for schools to generate a **bulk application delete report**.

Reports | Admission | Application Bulk Delete Data Audit

Select the **Start Date** and **End Date**. Select **OK**.

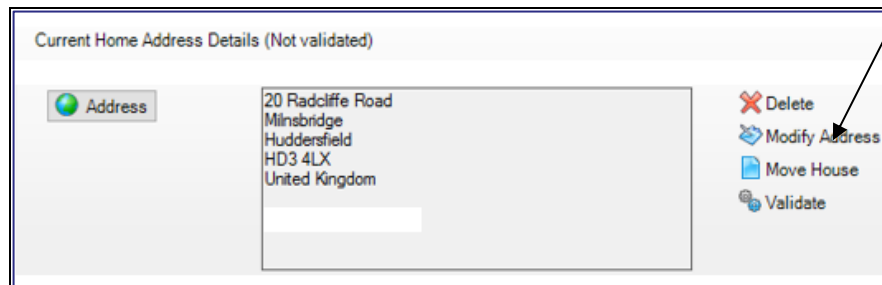
Choose the required output and select **OK**.

Application Bulk Delete Data Audit				
User ID	Username	Date Deleted	Records Updated/Deleted	Job Status
2	BlackA	13/02/2024 15:17:00	1	Finished

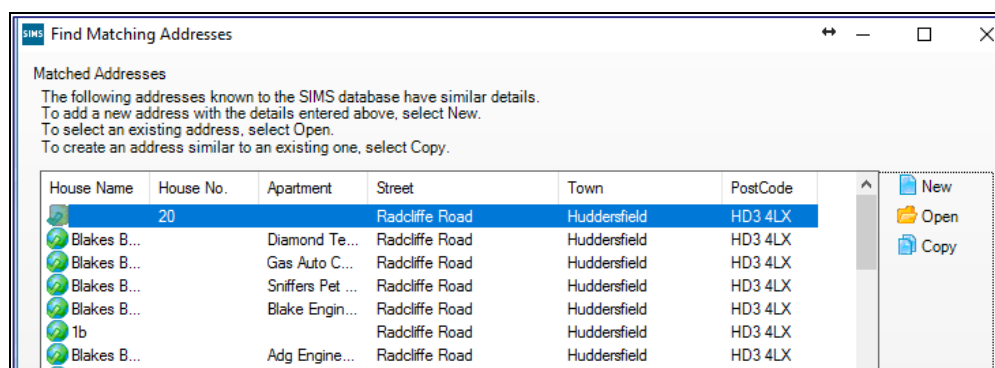
Wed 14 Feb 2024, 10:29

Chapter 12 Web Address Validation (WAV)

As your school should have Web Address Validation (WAV), then addresses would expect to be 'Validated' for all Pupils, Personnel and Contacts records.

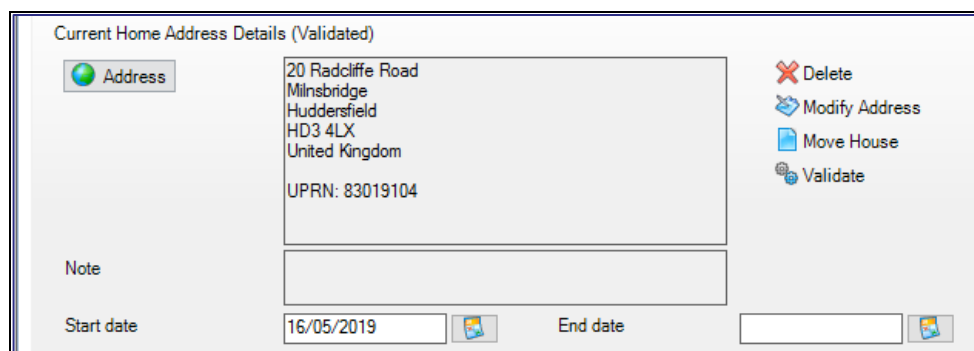


1. Highlight the address and **double click** or select **Open**.



House Name	House No.	Apartment	Street	Town	PostCode
	20		Radcliffe Road	Huddersfield	HD3 4LX
Blakes B...		Diamond Te...	Radcliffe Road	Huddersfield	HD3 4LX
Blakes B...		Gas Auto C...	Radcliffe Road	Huddersfield	HD3 4LX
Blakes B...		Sniffers Pet ...	Radcliffe Road	Huddersfield	HD3 4LX
Blakes B...		Blake Engin...	Radcliffe Road	Huddersfield	HD3 4LX
1b			Radcliffe Road	Huddersfield	HD3 4LX
Blakes B...		Adg Engine...	Radcliffe Road	Huddersfield	HD3 4LX

2. Highlight the address and **double click** or select **Open**.



3. **Save** the record.

<u>Name</u>		<u>Can provide help on / and any other related issues</u>	<u>Telephone / Email</u>
ICT Schools Team	MIS Support Financial Support Technical Support	Support and Training	01296 383500 # 1 ictschoools@buckinghamshire.gov.uk 01296 383500 # 3 SchoolTST@buckinghamshire.gov.uk
School Management Support Team		School Workforce Census School Census School & Pupil Data Free School Meals Checking Service AnyComms account queries	schoolcensus@buckinghamshire.gov.uk SMST@buckinghamshire.gov.uk

