



Applicable to 7.174 onwards

Producing the School Census Summer 2017 Return (English All-Through Schools) handbook



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01 | Introduction

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Overview

This handbook provides the information needed by All-Through schools in England to complete the School Census Summer 2017 Return, which takes place on Thursday 18 May 2017.

The School Census Summer 2017 Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

Currently, there are three School Census returns each year (i.e. Autumn, Spring and Summer), which collect detailed information about school characteristics and pupil/student details, e.g. pupil/student address, free school meals, exclusions, etc. Different data is collected depending on which return is being prepared, and your school phase.

A list of items collected from All-Through schools in England for the School Census Summer 2017 Return is available in a later section of this handbook (please see Preparing Data for the School Census Return on page 6).

NOTE: The content of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS to produce the School Census Return.

How has the School Census Summer Return Changed?

Changes to the School Census Summer Return include the following:

Data Items New to the Summer Return

Focus | Pupil (or Student) | Pupil (or Student) Details

The following new data items are collected in the return.

- **Ethnic/Cultural** panel items:
 - **Nationality**
 - **Country of Birth**
 - **First Language** is collected in the Summer return for the first time for Nursery schools.
- The **UPRN** (Unique Property Reference Number) displayed below the address details in the **Addresses** panel once the address has been selected and validated.
- Termly attendance is collected in the Summer return for the first time for Special schools.



Additional Resources:

Managing Pupil/Students handbook

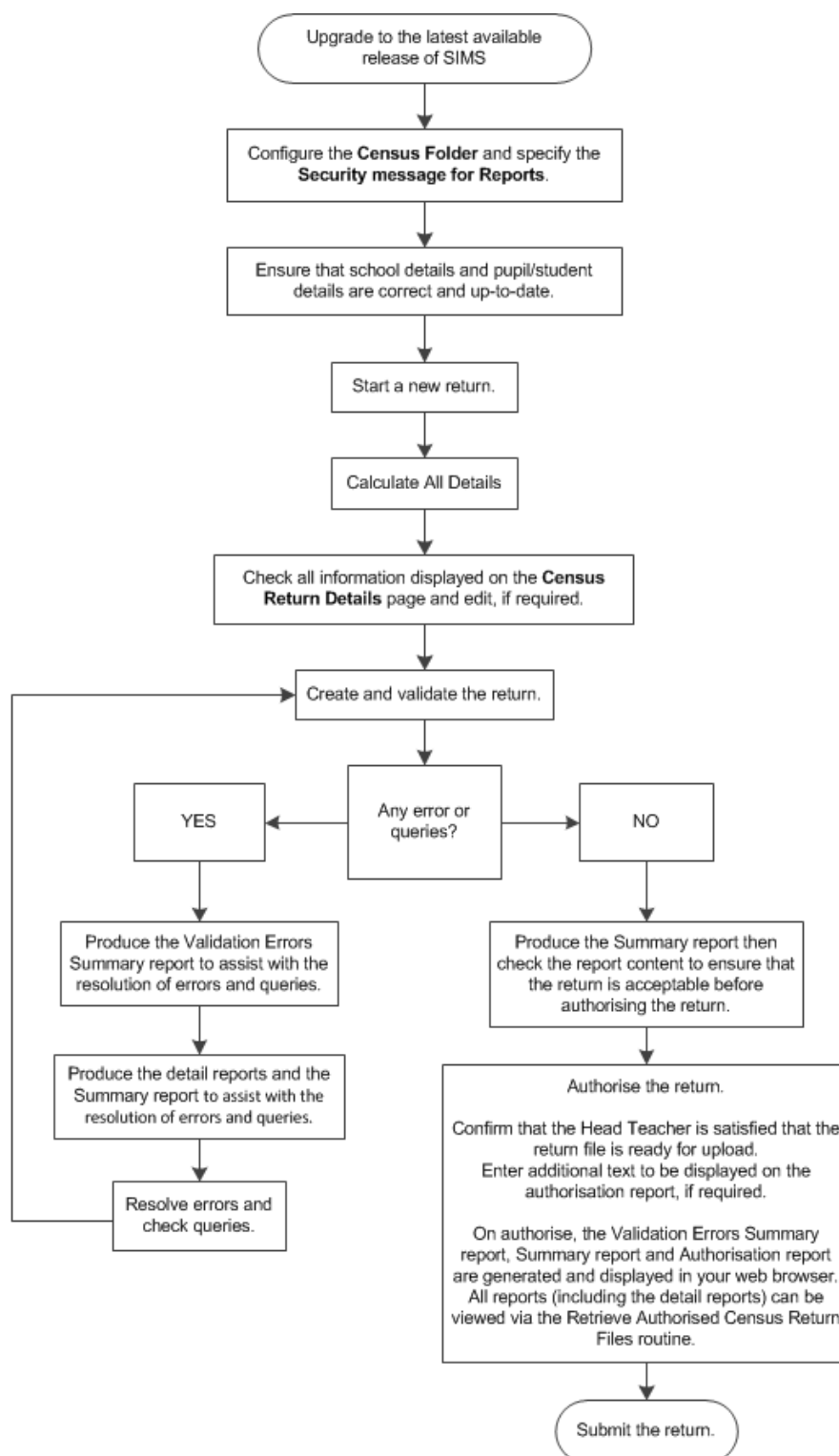
Data Items Removed from the Summer Return

Focus | Pupil (or Student) | Pupil (or Student) Details - Welfare panel

In Care is no longer collected in the Summer return.

Steps to Producing the School Census Return

The process of producing the School Census can be separated into a number of steps, some of which might need to be repeated in order to eliminate validation errors and queries.



Where to Find More Information

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

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

Documentation is also available from the My Account website (<https://myaccount.capita-cs.co.uk>).

1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

Alternatively, click **SIMS Publications** (located in the **Popular Searches** list) to display a list of all SIMS publications.

The search results are displayed automatically.

Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

- The search results can be refined further by using the advanced filters, e.g. **Sort by relevance** or **Sort by last modified**.
- The following rules can be applied to your search terms:
 - Surround a word or phrase with "double quotes" to return results containing that exact phrase.
 - Prefix a words or phrases with **+** to make them essential.

For example: "end of year procedures" +primary +detailed

In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, together with an Errors and Resolutions document that provides suggestions on how to resolve any validation errors or queries, are also available.

To access the School Census documents, please search for CENSUS17 in the SIMS **Documentation Centre** or My Account.

02 | Preparing for the School Census Summer Return

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Setting Permissions

The following permissions are applicable to users who deal with returns.

Producing the Return

To produce the return, you must be a member of the Returns Manager user group in System Manager.

Editing and Preparing Data

Users who edit and prepare data must have permissions to access additional areas of SIMS, e.g. pupil/student details, school details, etc. These users must be a member of any of the following user groups in System Manager:

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS), to be imported into SIMS between SIMS releases. To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of any of the following user groups in System Manager:

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available on the My Account website (<https://myaccount.capita-cs.co.uk>).

Where to find More Information about Permissions

Please contact your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *Managing SIMS Users, Groups and Databases* handbook.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (<https://myaccount.capita-cs.co.uk>).

To find the spreadsheet, search for <sims version> sims permissions, e.g. 7.174 sims permissions.

What Version of SIMS is Required?

To run the return, you must have the SIMS 2017 Spring Release (7.174) or later installed.

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed.

The version should read 7.174 or later.



Preparing Data for the School Census Return

Before beginning the process of producing the return, it is advisable to spend time ensuring that all school level and pupil/student level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupil/students have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

The following information is collected from All-Through schools for the School Census Summer 2017 Return.

School Level

Characteristics: LA number, DfE establishment number, school name, school phase, school type, highest national curriculum year, lowest national curriculum year, intake type, governance, school email address and telephone number.

Pupil/Student Level

- Pupil/Student Identifiers:
 - unique pupil number (UPN) and former UPN, unique learner number (ULN)
 - surname, forename, middle names, former surname, preferred surname
 - date of birth and gender.
- Characteristics:
 - nationality, country of birth, language code
 - free school meal eligibility start date, end date and UK country in which the eligibility applies, school dinner taken
 - funded hours, hours at setting, top-up funding indicator
 - post looked after arrangements, Youth Support Services Agreement (YSSA) indicator and Learner Support code.

- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator, actual national curriculum year group and class type.
- Special Educational Needs: SEN Provision.
- Termly Exclusion Information (01/09/2016 to 31/12/2016): exclusion category, reason for exclusion, SEN provision (formerly stage), exclusion start date and actual number of sessions from which the pupil/student was excluded.
- Home Information: Pupil/student's full home address, including post code and unique property reference number (UPRN).
- Termly Attendance Information (01/01/2017 to 16/04/2017): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate *Preparing for the School Census Summer 2017* guide. The preparation guide, together with other useful School Census documentation, can be found on the My Account website (<https://myaccount.capita-cs.co.uk>) by using the search facility to find CENSUS17.

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Creating a New School Census Return

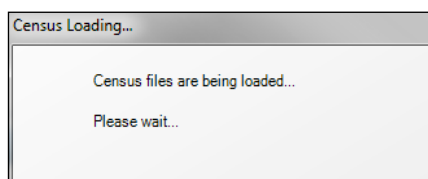
Before creating a new return, ensure that all pupil/student and school information is present and accurate in SIMS.

The School Census Summer 2017 Return collects data for:

- all pupil/students on the register on census day (18/05/2017).
- any additional pupil/students not on-roll on census day who:
 - had an exclusion that started between 01/09/2016 and 31/12/2016.
 - were on-roll for at least one session during the collection period from 01/01/2017 and 16/04/2017.
 - were awarded Learner Support funding from 01/08/2016 to 18/05/2017.

It is possible to create more than one return. This enables you to carry out dry runs so that you can check what data needs to be added or updated. Any unwanted returns can be deleted (providing they have not been authorised).

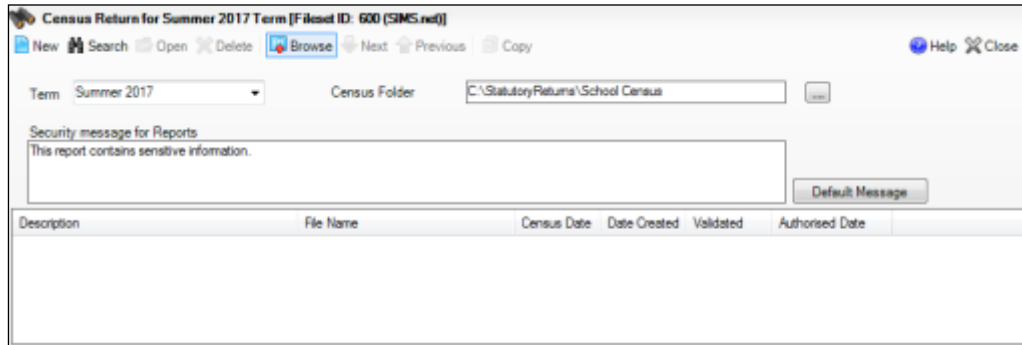
1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.



NOTE: The first time that the **Routines | Statutory Returns | School Census** menu route is selected during each SIMS session, there is a delay while the School Census files are loaded.

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When the files are loaded, the **Census Return** browser is displayed.



By default, **Summer 2017** is displayed in the **Term** field.

*TIP: To view a Spring return, select from the **Term** drop-down list then click the **Search** button.*

2. Ensure that the correct **Census Folder** is configured and that the required **Security message for Reports** is specified as described in the following sections.

Configuring the Census Folder

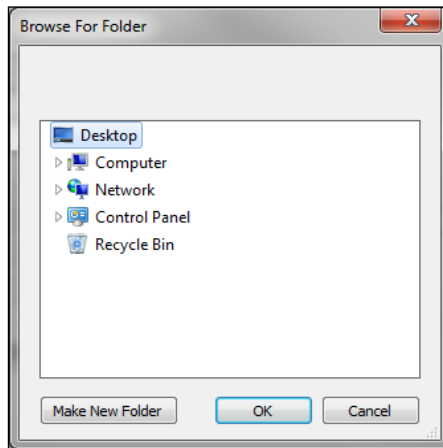
Before creating a return, the folder in which the return file will be saved must be specified.

IMPORTANT NOTE: Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. Please refer to the DfE website <https://www.gov.uk/service-manual/technology/securing-your-information> for securing information guidance. If you are in any doubt, consult with your IT Security Officer before proceeding.

1. Specify the folder where the return files are to be stored by entering the folder location in the **Census Folder** field.

Alternatively, click the **Browse** button to display the **Browse For Folder** dialog.



Navigate to the location of the required folder and highlight it. If a suitable folder does not exist, click the **Make New Folder** button and enter a suitable name for the new folder.

2. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.

IMPORTANT NOTE: *If you are changing the location of the folder, ensure that only authorised personnel have access to the new folder, as it will contain sensitive data. For more information, please see the important note at the beginning of this section.*

3. Ensure that the **Security Message for Reports** is appropriate for your school.

Specifying the Security Message for Reports

At the bottom of the browser is a **Security Message for Reports** field, which contains text that will be displayed at the top of each report.

1. The security message text defaults to `This report contains sensitive information`, but can be edited, if required.
2. If any edits are made, you can click the **Default Message** button to revert to the default text.
3. Click the **New** button to display the **Census Return Details** page.

Editing Census Details

The **Census Details** panel displays the following read-only information:

- Census Date: 18/05/2017
- Attendance data collected from 01/01/2017 to 16/04/2017
- Exclusions data collected from 01/09/2016 to 31/12/2016
- FSM (Free School Meal) data collected from 20/01/2017 to 18/05/2017
- Learner Support data collected from 01/08/2016 to 18/05/2017.



The screenshot shows the 'Census Details' panel with the following information:

Census Date	18/05/2017	Calculate All Details	
Description	School Census Summer 2017		
Attendance collected from	01/01/2017	Attendance collected to	16/04/2017
Exclusions collected from	01/09/2016	Exclusions collected to	31/12/2016
FSM collected from	20/01/2017	FSM collected to	18/05/2017
Learner Support collected from	01/08/2016	Learner Support collected to	18/05/2017

By default, the return **Description** is displayed as **School Census Summer 2017**.

1. Check the return **Description** and then edit, if required, e.g. to identify a dry run.

WARNING: Each description used must be unique. An error message is displayed if SIMS identifies a duplicate description.

A unique description also helps to identify the required return when viewed in the **Census Return** browser and can be particularly useful when creating dry runs, or copies of existing returns.

2. Click the **Calculate All Details** button.

Calculating All Details

Clicking the **Calculate All Details** button extracts the required information from SIMS and displays the results in the applicable panels of the **Census Return Details** page.

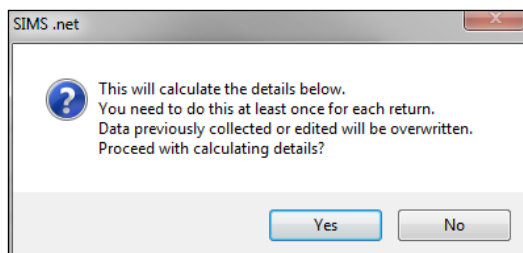
IMPORTANT NOTE: You must calculate all details at least once to populate the various panels for each return.

Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in SIMS.

Any details that are calculated automatically should be checked and edited, if required.

1. Click the **Calculate All Details** button.

A message advises that any existing data currently shown on the **Census Return Details** page will be overwritten.



2. Click the **Yes** button to calculate all details. At this point, depending on the number of pupil/students in the school, there may be a short delay while details are calculated.

The applicable panels on the **Census Return Details** page are populated with data.

3. The return can be saved at any point by clicking the **Save** button.

Editing School Information

The **School Information** panel displays details that have previously been recorded on the **School Details** page in SIMS (**Focus | School | School Details**). The information displayed may vary depending on your school and the details entered, e.g. Academy specific information.

The details displayed are read-only but can be amended if necessary via the **School Detail** button.

The screenshot shows the 'School Information' panel in SIMS. It contains the following fields and values:

School Name	Green Abbey School		
LA	923	Establishment Number	1250
Telephone	051234		
School E-mail Address	office@ga.org.uk		
School Phase	AT All Through		
School Type	Comprehensive all-through 11-18		
Governance	Community	Intake Type	Comprehensive
Lowest NC Year	7	Highest NC Year	13

At the bottom right of the panel is a button labeled 'School Detail'.

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1. If any details are missing or incorrect, click the **School Detail** button to display the **School Detail** dialog where information applicable to your school is displayed.

The screenshot shows a 'School Detail' dialog box for 'Green Abbey School'. The fields are as follows:

School Name	Green Abbey School	
LA	823 Central Bedfordshire	
Establishment Number	4321	
Unique Reference Number		
UK Provider Reference Number		
School Phase	All Through	
School Type	Comprehensive all-through 11-18	
School Governance	Community	
Intake Type	Comprehensive	
Previous School Name		Date Name Changed
Previous Estab Number		Date Number Changed
Previous URN Number		Date Number Changed
Boarding Pupils	<input type="checkbox"/> Nursery Class <input type="checkbox"/>	Special Class or Unit <input type="checkbox"/>
Head Teacher	Mr Adrian Blacker	Main Contact
		Mr Adrian Blacker

2. Add or amend the school details, selecting from the drop-down lists where applicable.

*NOTE: The **Establishment Number** and the **School Phase** cannot be edited. If the information displayed is incorrect, please contact your Local Support Unit.*

Information for Academies:

Academies should ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.
Select **Academies** from the applicable drop-down lists.
- The school's **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Date Number Changed** (both used by the School Census).

NOTE for Sponsor-led Academies where the DfE number has changed: If applicable, the date of arrival is reported as the date the DfE number changed and historical information from before this is not collected.

- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.
3. Click the **Save** button then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

Updating Early Years Data

Hours at Setting and Funded Hours data is collected from all schools that have early years pupils on-roll on census day. The hours collected in this return are for the week in which the census day falls.

All two, three and four year old pupils funded through the funded hours entitlement are eligible for a maximum of 15 funded hours a week.

Date of Birth Ranges	Phase and Year Group	Minimum Entitlement to Funded Hours
01/09/2012 and 31/03/2015 inclusive	All relevant schools and year groups	15 hours
01/09/2011 and 31/08/2012 inclusive	Nursery schools – all year groups All schools (excluding Nursery schools) – National Curriculum Year groups E1, E2, N1 and N2 only. <i>NOTE: No longer applies to Reception (R).</i>	15 hours

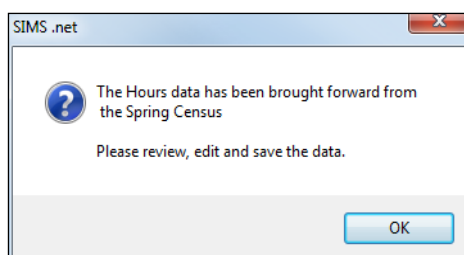
The required data can be recorded via the **Edit** button in the **Early Years** panel or via the **Update Early Years** page (**Tools | Statutory Returns Tools | Early Years**).

If data has been recorded previously, the values are displayed in the **Early Years** panel, which is read-only.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/03/2016	Age at 31/12/2016	Age at 31/03/2017	Hours at Setting	Funded Hours
Abba, Shaqib	17/12/2013	Male	001582	N1	N1 AM	3	3	3	15	15
Adams, Sadie	20/03/2013	Female	001521	N2	AM	3	3	4	15	15
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	15	15
Andrews, Richard	02/12/2012	Male	001523	N2	AM	3	4	4	15	15
Bronislaw, Tomaz	06/04/2013	Male	001524	N2	PM	3	3	3	15	15
Clark, Hammett	09/11/2012	Female	001525	N2	AM	3	4	4	15	15
Davies, Adam	01/12/2012	Male	001526	N2	AM	3	4	4	15	15

Adding/Editing Early Years Data

1. In the **Early Years** panel, click the **Edit** button to display a message informing you that hours data has been brought forward from the previous census.



2. Click the **OK** button to display the **Update Early Years** page. By default, the current term is displayed in the **Census** panel.

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- If you want to view the data recorded for a previous term (in the current academic year), select the required **Term** from the drop-down list.

The screenshot shows the 'Update Early Years' interface. At the top, there are 'Save' and 'Undo' buttons. Below that, there are filters for 'Census Term' (set to 'Summer 2017'), 'Update Hours' button, 'Pupils View' section with 'Age at 31/08/2016' and 'YTI' dropdowns, and other filters for 'Reg' and 'Status'. The main part of the interface is a table titled 'Pupils' with the following data:

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Age at 31/03/2017	Hours at Setting	Funded Hours
Abbra, Shagab	17/12/2013	Male	001580	N1	N1 A	2	3	3	15	15
Adams, Sadie	20/03/2013	Female	001521	N2	AM	3	3	4	15	15
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	15	15
Andrew, Richard	02/12/2012	Male	001523	N2	AM	3	4	4	15	15
Bronislaw, Tomasz	06/04/2013	Male	001524	N2	PM	3	3	3	15	15
Clarke, Henriette	09/11/2012	Female	001525	N2	AM	3	4	4	15	15
Davies, Adam	01/12/2012	Male	001526	N2	AM	3	4	4	15	15
Dellave, Millicent	10/02/2014	Female	001583	N1	N1 PM	2	2	3	15	15
Elliott, Josef	15/02/2013	Male	001527	N2	PM	3	3	4	15	15
Ellis, Paul	09/02/2014	Male	001584	N1	N1 PM	2	2	3	15	15
Erikson, Finley	23/12/2012	Male	001528	N2	AM	3	4	4	15	15
Gilbey, Clarissa	10/04/2013	Female	001529	N2	AM	3	3	3	15	15
Gorev, Edgar	20/05/2013	Male	001530	N2	AM	3	3	3	15	15
Haddon, Magdalene	21/02/2013	Female	001531	N2	AM	3	3	4	15	15
Hellerton, Brooke	10/03/2013	Female	001532	N2	PM	3	3	4	15	15
Jones, Daniel	16/11/2012	Male	001533	N2	PM	3	4	4	15	15
Kaur, Aafia	04/04/2014	Female	001585	N1	N1 PM	2	2	2	15	15
Lin, Jian	22/01/2014	Male	001586	N1	N1 PM	2	2	3	15	15
Lowes, Ching	01/02/2013	Male	001534	N2	PM	3	3	4	15	15

Primary phase schools that have defined Early Years Attendance Patterns (via **Focus | Pupil (or Student) | Pupil (or Student) Details**) for pupils who are receiving free nursery care can update Hours at Setting automatically.

- Click the **Update Hours** button (applicable to Primary phase schools only).

The number of Hours at Setting that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern) are displayed in the **Pupils** panel.

- Edit the values, if required.

NOTE: If your school does not use the Define Early Years Attendance Patterns functionality, the data can be entered in the grid manually.

4. To add or edit the number of **Hours at Setting** or **Funded Hours** for an individual pupil, select the required criteria in the **Pupils View** panel. In the **Pupils** panel, highlight the required pupil then click the applicable cell and enter the required number of hours.

IMPORTANT NOTES: A value must be entered in each **Hours at Setting** and **Funded Hours** cell. Leaving a cell blank results in a validation error being displayed when the return is created and validated.

0 (zero) is a valid value. Hours must be entered in multiples of 0.5 only.

If the value entered is within the accepted range but higher than expected by the DfE, a validation error is displayed when the return is created and validated. An explanation as to why the value is higher should be recorded on the COLLECT Portal.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Age at 31/08/2016	Age at 31/12/2016	Age at 31/03/2017	Hours at Setting	Funded Hours
Abhra, Shaqub	17/12/2013	Male	001582	N1	N1 AM	2	3	3	15	15
Adams, Sadie	20/03/2013	Female	001521	N2	AM	3	3	4	15	15
Alyona, Tatyana	21/12/2012	Female	001522	N2	PM	3	4	4	15	15
Andrew, Richard	02/12/2012	Male	001523	N2	AM	3	4	4	15	15
Bronislaw, Tomasz	06/04/2013	Male	001524	N2	PM	3	3	3	15	15
Clarke, Harriette	09/11/2012	Female	001525	N2	AM	3	4	4	15	15

5. If most of the pupils are receiving the same number of hours, the following method can be used to populate the column quickly:
- In the **Pupils View** panel, select the required year group from the **YTI** (Year Taught In) drop-down list. Only the selected pupils are displayed in the **Pupils** panel.
 - Right-click in the **Pupils** panel then select **Select All** from the drop-down list.
 - Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** or **Funded Hours**, then enter the number of hours that is applicable to the majority of pupils. This number is then entered automatically for the remaining pupils.
 - Click to the right of the grid to deselect all.
 - Edit the entry for each pupil who is receiving a different number of hours. This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting** or **Funded Hours** cell as applicable, then entering the required number.
6. Click the **Save** button. If there are any pupils for whom zero hours have been recorded, a message is displayed. Click the **Yes** button to save the data or the **No** button to return to the **Update Hours** page, where the number of hours can be entered.

- Click the **OK** button to return to the **Census Return Details** page, where the updated hours are displayed.

IMPORTANT NOTES:

If, while completing the return, any of the following processes are performed, click the **Recalculate** button (located at the top right-hand side of the panel) to ensure that the up-to-date data is displayed in the **Early Years** panel:

- Hours at Setting or Funded Hours are edited via the **Tools** menu
- a new pupil is added in SIMS
- a pupil's date of birth is amended.

Please note that updating Hours at Setting or Funded Hours on the **Update Early Years** page updates the display in the **Early Years** panel automatically.

Identifying which Children have no Hours Recorded

- On the **Census Return Details** page, click the **Edit** button (located in the **Early Years** panel) to display the **Update Early Years** page.
- In the **Pupils View** panel, ensure that the required **Age at date**, **YTI** and **Reg** group are selected then select **No Hours at Setting** (or **No Funded Hours**) from the **Status** drop-down list.

Only pupils who do not have an entry for **Hours at Setting** (or **Funded Hours**) are displayed.

- Enter the required values for these pupils as described previously.
- Click the **Save** button.

Updating Class Types

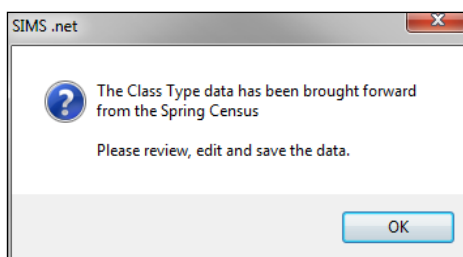
Primary schools must specify the type of class (**Nursery** or **Other**) that each pupil/student belongs to on census day. Pupil/students in your Nursery class should be specified as **Nursery**, with all other pupil/students specified as **Other**.

If the class types have previously been recorded via **Tools | Statutory Return Tools | Update Class Type**, the data is displayed automatically in the **Class Type** panel.

Name	Date of Birth	Gender	AdNo	YTI	Reg	Nursery	Other
Aaron, Chase	01/09/2005	Male	001102	5	6K01		✓
Aaron, Liz	01/09/2005	Female	001103	5	6K01		✓
Aaron, Sophie	01/09/2005	Female	001104	5	6VC		✓
Abdullah, Tamwar	12/01/2005	Male	001275	3	3TC	✓	
Abina, Abije	20/11/2009	Male	001336	2	2JB	✓	
Abina, Aishe	20/11/2009	Female	001337	2	2JB	✓	

The **Class Type** panel is read-only but can be updated by clicking the button, if required.

1. Click the **Edit** button to display a message informing you that class type data has been brought forward from the previous census.



2. Click the **OK** button to display the **Update Class Type** page. By default, the current **Term** is displayed in the **Census** panel. If you wish to view the data recorded for a previous term (in the current calendar year), select as required from the drop-down list.

NOTE: If new pupil/students exist, the default class type is blank.

Name	Date of Birth	Gender	AdNo.	YTI	Reg	Nursery	Other
Aaron, Chris	01/09/2005	Male	001102	6	6KH		✓
Aaron, Liz	01/09/2005	Female	001103	6	6KH		✓
Aaron, Sophie	01/09/2005	Female	001104	6	6VC		✓
Abdullah, Tamwar	12/01/2009	Male	001275	3	3TO	✓	
Abhra, Abjit	20/11/2009	Male	001336	2	2JB	✓	

3. To specify the class type for an individual pupil/student, click the associated **Nursery** or **Other** cell to enter a tick. To change your selection, click in a different cell or click again in the current cell to remove the tick.
4. If all or the majority of pupils need to be assigned the same class type, the following method can be used to populate the **Nursery** and **Other** columns quickly:
 - a. Right-click the **Other** column header then select **Check All**.
 - b. In the **View Pupils** panel, select **Year N2** from the year taught in (**YTI**) drop-down list. Only Year **N2** pupils are displayed in the **Pupils** panel.
 - c. Right-click the **Nursery** column then select **Check All**.
 - d. Repeat steps *b* and *c* for any additional Nursery classes.
 - e. To check your selections, select **All** from the **Year Group** drop-down list.

5. Click the **Save** button.

If a message is displayed advising that some pupils have not been assigned a class type, click the **Yes** button then ensure that a class type is allocated to all pupil/students before saving again.

6. Click the **OK** button to return to the **Census Return Details** page, where the updated class types are displayed.

Resetting All Class Types

On the **Update Class Type** page, right-click in the **Nursery** or **Other** column header, as required, then select **Remove All** from the drop-down list. The **Nursery** or **Other** column is cleared of all ticks.

Re-enter the correct class types as described previously.

Identifying which Pupils have no Class Type Specified

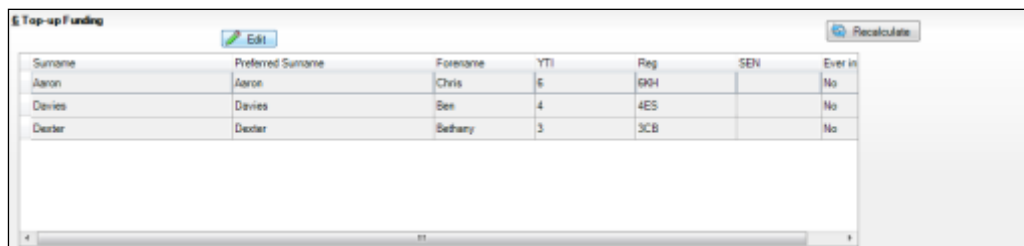
To ensure that all pupils are assigned to a class type (via the **Update Class Type** page), select **No Class Type** from the **Status** drop-down list in the **Pupils View** panel. Any pupils without a **Class Type** are displayed in the **Pupils** panel.

Updating Pupil/Students with Top-Up Funding

Top-up funding is supplied to schools, in most cases by the Local Authority, to meet the additional costs of support for high needs pupil/students.

The **Top-up Funding** panel enables you to record the on-roll pupil/students for whom your school is receiving top-up funding on census day.

If the pupil/students with top-up funding have been recorded previously via **Tools | Statutory Return Tools | Update Top-Up Funding**, the data is displayed in the **Top-up Funding** panel.



Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in
Aaron	Aaron	Chris	6	GNH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	SCB		No

The information displayed in the **Top-up Funding** panel is read-only.

Updating top-up funding information, e.g. adding or removing a pupil/student, must be done via the **Edit** button.

1. Click the **Edit** button to display the **Update Pupil (or Student)s with Top-up Funding** dialog. The pupil/students currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).

Update Students with Top-up Funding

Update

Term: Summer 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All Reg: All

Preferred Surname: SEN: <Any> Ever in care at this school: <Any> Search

Top-up Funding

Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No

2. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupil/students you wish to record as having top-up funding.

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*TIP: Click the **Search** button to display a list of pupil/students who have not been defined as having top-up funding. Alternatively, enter all or part of the required search criteria then click the **Search** button.*

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
White	White	Aurora	4	4SL		No
Whitehead	Whitehead	William	R	ELM		No
Whitmore	Whitmore	Amie	2	2JB		No

- Highlight the pupil/student(s) who you want to record as having top-up funding then click the **Add** button to move the selected pupil/student(s) to the **Top-up Funding** list.

One or more pupil/students can be selected using the **Ctrl+click** or **Shift+click** functionality.

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Whitehead	Whitehead	William	R	ELM		No

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Aaron	Aaron	Chris	6	6KH		No
Davies	Davies	Ben	4	4ES		No
Dexter	Dexter	Bethany	3	3CB		No
White	White	Aurora	4	4SL		No
Whitmore	Whitmore	Amie	2	2JB		No

- To remove a pupil/student from the **Top-up Funding** list, highlight the required pupil/student then click the **Remove** button. The pupil/student's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
- Click the **Update** button to save the data and arrange the list of pupil/students in **Surname** order.
- Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.



Additional Resources:

Preparing for the School Census Summer 2017 Return handbook



More Information:

Top-up Funding Report on page 42

Editing Pupil/Students Post Looked After Arrangements

The Post Looked After Arrangements routine provides schools with the ability to record whether pupil/students who are on-roll on census day were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order.

If the pupil/students with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Student Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

- Click the **Recalculate** button (in the **Post Looked After Arrangements** panel) to ensure that all pupil/students who already have a PLAA status are displayed.

Surname	Preferred Surname	Forename	YTI	Reg	Ever in C.	Post Looked After Arrangements
Cain	Cain	William	R	ELM	Yes	Ceased to be looked after through Adoption
Franklin	Franklin	Ethel	2	2JB	Yes	Ceased to be looked after through a Special Guardianship Order (SGO)

The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a pupil/student, must be done via the **Edit** button.

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2. Click the **Edit** button to display the **Update Pupil (or Student)s Post Looked After Arrangements** page. Any pupil/students currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list (located in the bottom half of the page).

Update Students Post Looked After Arrangements

Update

Term: Summer 2017 Students On-Roll on Census Day

Surname: Forename: YTI: All

Preferred Surname: Reg: All Ever in Care at this school: <Any> Search

Post Looked After Arrangements Add Remove

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	Evidence Obtained
Cain	Cain	William	R	ELM	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Franklin	Franklin	Ethan	2	2JB	Yes	Ceased to be looked after through a Special Guardianship..	<input type="checkbox"/>

3. Use the **Students On-Roll on Census Day** search criteria to locate the additional pupil/students you wish to record as having PLAA.

TIP: Click the **Search** button to display a list of pupil/students who have not been defined as having PLAA. Alternatively, enter all or part of the required search criteria then click the **Search** button.

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care
Smith	Smith	Alex	6	6VC	No
Smith	Smith	Amy	6	6KH	No
Smith	Smith	Erin	1	PINE	No
Smith	Smith	Laura	6	6VC	No
Smyth	Smyth	Cheryl	3	3TO	No
Smyth	Smyth	Jonathan	3	3CB	No
Smyth	Smyth	Rhianna	3	3CB	No
Smythye	Smythye	Vincent	4	4SL	No

4. Highlight the required pupil/students then click the **Add** button to move the selected pupil/students to the **Post Looked After Arrangements** list. One or more pupil/students can be selected using the **Ctrl+click** or **Shift+click** functionality.

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Post Looked After Arrangements	Evidence Obtained
Cain	Cain	William	R	ELM	Yes	Ceased to be looked after through Adoption	<input checked="" type="checkbox"/>
Franklin	Franklin	Ethan	2	2/B	Yes	Ceased to be looked after through a Special Guardianship Order (SGO)	<input type="checkbox"/>
Smith	Smith	Amy	6	6KH	No	Ceased to be looked after through Adoption	<input type="checkbox"/>
Smyth	Smyth	Jonathan	3	3CB	No	Ceased to be looked after through a Special Guardianship Order (SGO)	<input type="checkbox"/>
						Ceased to be looked after through a Residence Order (RO)	<input type="checkbox"/>
						Ceased to be looked after through a Child Arrangement Order (CAO)	<input type="checkbox"/>

5. For each pupil/student added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Post Looked After Arrangements** column then selecting the required status from the drop-down list:
- **Ceased to be looked after through Adoption**
 - **Ceased to be looked after through a Special Guardianship Order (SGO)**
 - **Ceased to be looked after through a Residence Order (RO)**
 - **Ceased to be looked after through a Child Arrangement Order (CAO).**

NOTE: Ceased to be looked after through a Residence Order (RO) has been replaced by Ceased to be looked after through a Child Arrangement Order (CAO).

You do not need to change any existing residence orders but new post looked after arrangements must be recorded as child arrangement orders.

6. Select the **Evidence Obtained** check box if documents have been obtained that provide evidence of the post looked after arrangements.

NOTE: Evidence Obtained is not collected in the School Census return but should be recorded as proof of DfE/Ofsted compliance.

7. To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
8. Click the **Update** button to save the information and arrange the list of pupil/students in surname order.
If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.
9. Click the **OK** button to continue.
10. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.



Additional Resources:

Preparing for the School Census Summer 2017 Return handbook



More Information:

Post Looked After Arrangements Report on page 43

Managing School Dinners Taken on Census Day

Applicable to schools with pupils in Reception, Year 1 and Year 2

All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the local authority. The School Census Summer 2017 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

The **School Dinner Taken** panel displays all pupils in Reception, Year 1 and Year 2 who are on-roll on census day. The options available in the panel enable you to record pupils who have taken a Universal Infant School Meals on census day, so that accurate data can be included in the census.

NOTES: The Reference Date is provided so that your school can report school dinners taken on an alternative date to census day, if required.

The pupils listed in the **School Dinner Taken** panel are those who are on-roll on census day. Whereas the data calculated via the **Calculate From Attendance** and the **Calculate From Dinner Money** buttons is based on the reference date.

If your school uses SIMS Dinner Money or SIMS Attendance, the number of dinners taken on census day can be calculated using the data recorded when using these modules. If either or both of these modules are not in use, the applicable **Calculate From** button(s), as displayed in the following graphic, are not displayed but the information can be recorded manually.

The screenshot shows the 'School Dinner Taken' interface. At the top, there is a 'Reference Date' field set to '18/05/2017'. Below it, a 'Group By' dropdown is set to '-'. Two buttons, 'Calculate From Attendance' and 'Calculate From Dinner Money', are visible. The main area contains a table with the following columns: Surname, Forename, Y1, Reg Group, Enrol Status, and School Dinner Taken. The table lists 18 pupils. At the bottom right, there are two summary fields: 'Total Taken: 0' and 'Total Not Taken: 180'. A 'Reset' button is located on the right side of the table.

- 1 By default, the **Reference Date** is set to 18/05/2017 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation.
- 2 Click the required column header to sort the data.
- 3 The **Calculate From Attendance** button is displayed only if SIMS Attendance is in use.
- 4 The **Calculate from Dinner Money** button is displayed only if SIMS Dinner Money is in use.
- 5 When the **Reset** button is clicked all existing ticks are removed from the **School Dinner Taken** column enabling you to start the process again.
- 6 The **Total Taken** and **Total Not Taken** provide an indication of whether the number of school dinners taken is correct or whether edits are required.

After the return has been created and validated, the School Dinner Taken detail report can be run to assist with the checking of results.



More Information:

School Dinner Taken Report on page 42

Using Dinner Money to Calculate School Dinners Taken on Census Day

If SIMS Dinner Money is in use, the Dinner Money data recorded for census day can be used to calculate the number of school dinners taken on census day.

Many users of SIMS Dinner Money also use SIMS Attendance. If this is the case the **Calculate From Attendance** button is also displayed.

However, it is recommended that the Calculate From Dinner Money routine is used in the first instance. This is because the Calculate From Attendance routine looks at all pupils with a present or late attendance mark on census day morning. These pupils could be taking any sort of meal on census day, e.g. going home for lunch, pack lunch brought from home, as well as meals provided by the school. The School Census return is only interested in school meals provided by the school.

SIMS Dinner Money takes into account these different meal types and populates the **School Dinner Taken** column with ticks where meals provided by the school only have been taken.

Surname	Forename	Yr	Reg Group	Enrol Status	School Dinner Taken
Abbs	Abjt	2	2JB	Single Registration	✓
Abbs	Aisha	2	2JB	Single Registration	✓
Abbs	Neel	2	2GH	Single Registration	✓
Ackton	Star	2	2GH	Single Registration	
Adams	Nancy	R	ELM	Single Registration	
Akeman	Richard	1	ELM	Single Registration	✓
Akeman	Steve	1	ELM	Single Registration	✓
Alala	Candia	R	PINE	Single Registration	
Alamilla	Sofia	1	PINE	Single Registration	
Andrews	Josef	2	2GH	Single Registration	✓
Bailey	Eve	2	2JB	Single Registration	
Balik	Karlina	1	ASH	Single Registration	
Baleski	Cyla	2	2JB	Single Registration	
Baleski	Fil	2	2JB	Single Registration	✓

1. Click the **Calculate From Dinner Money** button.

WARNING: Clicking the **Calculate From Dinner Money** button overwrites all existing data in the **School Dinner Taken** panel.

If SIMS detects missing information, the following message is displayed:

Dinner Money information is incomplete. Please ensure that meals are recorded in Dinner Money.

2. Click the **Cancel** button to return to SIMS where the missing information can be entered or the **OK** button to continue.

A tick is entered against each pupil who is receiving any type of meal provided by the school on census day. These meals have a meal type category of **School Provided**, with a description such as hot school meal or school sandwich.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

Using Attendance to Calculate School Dinners Taken on Census Day

The School Census Return only requires information about school meals provided by the school on census day. However, if SIMS Attendance is in use, the attendance data recorded for census day morning can be used to calculate all pupils who are present and are likely to be taking a school dinner.

The information calculated from attendance can be edited to so that school meals provided by the school only are collected in the return.

1. Click the **Calculate From Attendance** button.

WARNING: Clicking the **Calculate From Attendance** button overwrites existing data in the **School Dinner Taken** panel.

If missing marks exist, a message is displayed:

Please ensure that registers have been taken. Missing marks have been interpreted as absent and no dinner taken.

2. Click the **Cancel** button to return to SIMS where missing marks can be entered or the **OK** button to continue.

A tick is entered against each pupil who is marked as present on census day morning (i.e. AM session). It is possible that some of these pupils are not taking meals provided by the school, e.g. they go home for dinner or bring a packed lunch from home. Meals provided by the school only are required for the return.

Use the **Group By** functionality to group pupils by **Year Taught In, Reg Group** or **Enrolment Status**, enabling school dinners taken information to be updated from class lists, etc.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

Using Manual Entry to Record School Dinners Taken on Census Day

If your school is not using SIMS Dinner Money or SIMS Attendance the number of school dinners taken on census day (i.e. meals provided by the school) can be entered manually.

1. Click the **Tick All** button to populate the **School Dinner Taken** column. All pupils are ticked indicating that they received a school dinner on census day.
2. Edit individual records by clicking the applicable **School Dinner Taken** cell to toggle between a tick and blank (no meal taken).

Surname	Forename	Yr	Reg Group	Enrol Status	School Dinner Taken
Abbs	Abje	2	2JB	Single Registration	✓
Abbs	Aisha	2	2JB	Single Registration	✓
Abbs	Neel	2	2GH	Single Registration	✓
Ackton	Stan	2	2GH	Single Registration	
Adams	Nancy	R	ELM	Single Registration	
Akerson	Richard	1	ELM	Single Registration	✓
Akerson	Steven	1	ELM	Single Registration	✓
Alala	Candia	R	PINE	Single Registration	
Alamilla	Sofia	1	PINE	Single Registration	
Andrews	Josef	2	2GH	Single Registration	✓
Bailey	Eve	2	2JB	Single Registration	
Balk	Karina	1	ASH	Single Registration	
Balinski	Cyla	2	2JB	Single Registration	
Balinski	Fil	2	2JB	Single Registration	✓

The **Total Taken** and **Total Not Taken** (located at the bottom of the panel) provide an indication of whether the number of school dinners taken is correct or whether further edits are required.

3. After the return has been created and validated, run the School Dinner Taken detail report and then check the report contents.
4. Continue editing until school dinner taken details are correct.

WARNING: Clicking the **Reset** button removes all existing ticks from the **School Dinner Taken** column.

Entering Attendance Information

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupil/students and leavers aged four to 15 inclusive on 31/08/2016, who were on-roll for at least one session during the collection period from 01/01/2017 to 16/04/2017.

Initially the **Attendance** panel is blank. However, after clicking the **Calculate All Details** button (located in the **School Information** panel) the display changes.

IMPORTANT NOTE: Clicking the **Calculate All Details** button overwrites any edited data, in every panel, with the original data stored in SIMS. Do not use this button if you wish to keep any changes you have made.

The information displayed in the **Attendance** panel (after the **Calculate All Details** button is clicked) is dependent on which of the following is applicable:

- SIMS Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either:
 - no missing marks
 - or
 - missing marks.
- SIMS Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.
- SIMS Attendance/Lesson Monitor is not in use.

SIMS Attendance/Lesson Monitor Users

If SIMS Attendance/Lesson Monitor is in use, ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

*TIP: After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.*

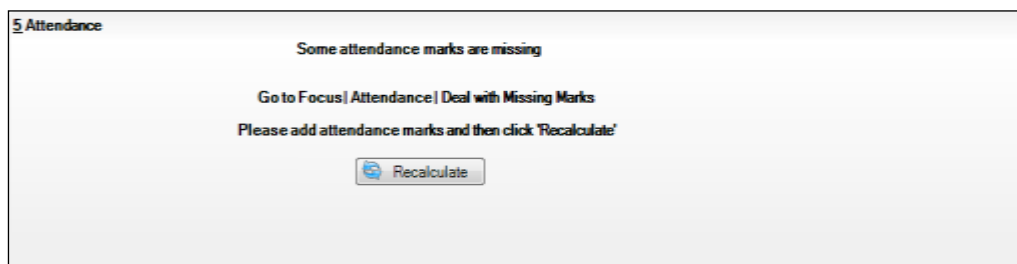
Are your Attendance Codes DfE Compliant?

If Attendance/Lesson Monitor is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are no missing marks.

If all attendance marks have been entered in Attendance/Lesson Monitor, the following message is displayed in the **Attendance** panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.



However, if any missing attendance marks are detected, the following message is displayed in the **Attendance** panel, requesting that you add the missing attendance marks.



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1. Use the Deal with Missing Marks routine (**Focus | Attendance (or Lesson Monitor) | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** panel to ensure that all missing marks have been dealt with.

NOTE: The Create and Validate process can still be run even if some attendance marks are missing. You will be asked if you wish to continue to create the return or cancel the Create and Validate process.

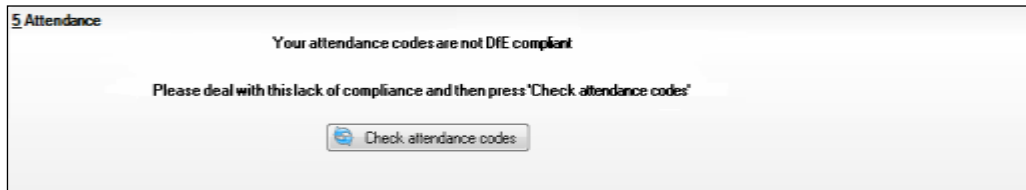


More Information:

Producing Detail Reports on page 40

Are your Attendance Codes DfE Non-Compliant?

If Attendance/Lesson Monitor is in use but one or more invalid attendance codes have been detected, e.g. the **F**, **Z** or **@** code is in use, a message is displayed in the **Attendance** panel to inform you that your attendance codes are not DfE compliant.



1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.
If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.
3. Click the **OK** button to continue.

SIMS Attendance/Lesson Monitor Not in Use

If Attendance/Lesson Monitor is not in use, the following data must be entered manually:

- Termly Possible Sessions (**T Poss Sessions**)
- Termly Sessions Missed due to Authorised Absence (**T Auth Absences**)
- Termly Sessions Missed due to Unauthorised Absence (**T Unauth Absences**).

Surname	Forename	Year Taught In	Reg Group	Enrol Status	T Poss Sessions	T Auth Absences	T Unauth Absences
Alexanders	Serina			On Roll	0	0	0
Bebe	Rud			On Roll	0	0	0
Bedeau	Sebastiana			On Roll	0	0	0
Benard	Junius			On Roll	0	0	0
Bourstige	June			On Roll	0	0	0
Calzone	Martin			On Roll	0	0	0
Catapano	Charity			On Roll	0	0	0
Dannell	Glen			On Roll	0	0	0
Dobaner	Hilbert			On Roll	0	0	0
Dusel	Ambrogio			On Roll	0	0	0
Frymark	Garnett			On Roll	0	0	0
Garcia	Sally			On Roll	0	0	0
Gaskley	Silvano			On Roll	0	0	0
Geunont	Allegria			On Roll	0	0	0

1. To filter the display of pupil/students in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.
Alternatively, select **Group by None** to display a list of all pupil/students.
2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each pupil/student, enter the correct attendance numbers in the **T Poss Sessions**, **T Auth Absences** and **T Unauth Absences** columns.
4. To clear the attendance information and check for additional pupil/students, click the **Check for additional students & zero totals** button.

WARNING: If the **Check for additional students & zero totals** button is clicked, any attendance data entered manually is lost.

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Creating and Validating the School Census Return

A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

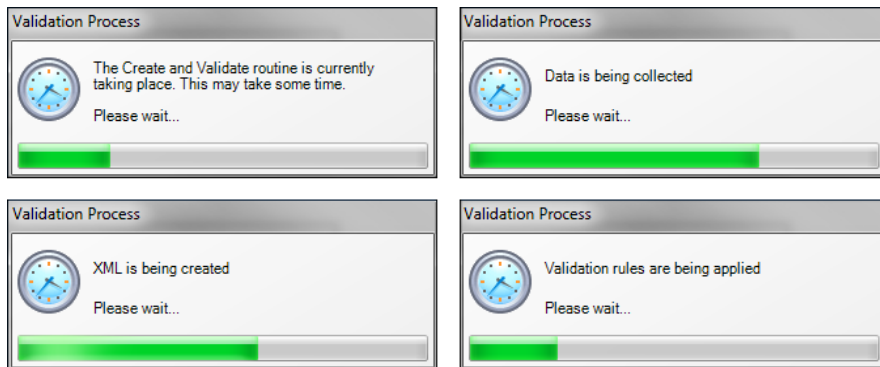
Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

An error is caused by either missing or inaccurate data, whilst a query highlights data that is unusual or not as expected, e.g. there are no pupil/students showing as having special educational needs.

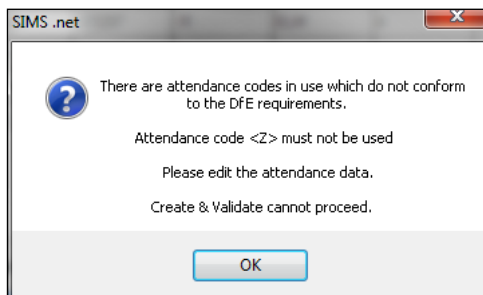
1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to start the process. There may be a short delay, depending on the number of pupil/students at your school.

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A progress bar is displayed, indicating that the Create and Validate process is being performed.

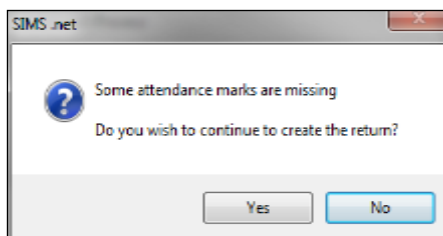


If any attendance codes are not DfE compliant, a dialog similar to the following graphic is displayed, informing you which code(s) must not be used.



The lack of compliance must be dealt with before the Create and Validate process can be performed. Please contact your Local Support Unit for assistance.

If there are any missing attendance marks, the following message is displayed, enquiring whether you wish to continue with the Create and Validate process.



Click the **Yes** button to continue creating and validating the data.

Alternatively, click the **No** button to cancel the process, then use the Deal with Missing Marks routine (**Focus | Attendance** (or **Lesson Monitor**) | **Deal with Missing Marks**) to locate the missing marks and enter the appropriate attendance codes.

For more information, please refer to the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook.

When the validation process is complete, the **Validation Errors Summary** panel is displayed at the bottom of the screen.

Resolving Validation Errors and Checking Queries

After creating the return file and validating the data, any errors and queries found are listed in the **Validation Errors Summary** panel at the bottom of the **Census Return Details** page.

Type	Sequence	Message	Location	Solution
F	1500	LPI missing	Name: Abraham, Jewel Date of Birth: 2005-05-19, Female/LPI#	# Go to Focus Student Student Details and add or issue a LPI
F	1500	LPI missing	Name: Pead, Rowan Date of Birth: 2005-02-07, Female/LPI#	# Go to Focus Student Student Details and add or issue a LPI
F	1940	Pupils aged 5 and over Language missing or invalid	Name: Henderson, Jack Date of Birth: 2010-05-07, Male/LPI# 462229914029	# Go to Focus Student Student Details Ethnolcultural panel and enter First language
F	2280	Invalid Address information provided	Name: Bains, Kati Date of Birth: 2005-07-18, Male/LPI# 462229910001	# Go to Focus Student Student Details Address and add pupil's address
Q	1607Q	Please Check: Pupils age is out of range for school type	Name: Sunjag, Skesene Date of Birth: 2005-03-26, Female, Age: 12/LPI# 462229910008	# Go to Focus Student Student Details and enter pupil's date of birth
Q	1400Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	Name: Bennison, Hugo Date of Birth: 2016-02-03, Male/LPI#	# Go to Focus Student Student Details and check for duplicate pupil record
Q	1400Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth	Name: Bennison, Hugo Date of Birth: 2016-02-03, Male/LPI# 162229914006	# Go to Focus Student Student Details and check for duplicate pupil record
Q	2384Q	Please check: Pupil record with no address details	Name: Balmori, Cyrl Date of Birth: 2010-03-14, Female/LPI# 432229914209	# Go to Focus Student Student Details Address and add pupil's address
Q	2500Q	Please check: sessions possible should not be greater than 165	Name: Aaron, Lici Date of Birth: 2005-05-01, Female/LPI# 262229910002	# Go to Focus Attendance Lesson Monitor Display Marks and check the attendance marks
Q	2500Q	Please check: sessions possible should not be greater than 165	Name: Aaron, Sophie Date of Birth: 2005-09-01, Female/LPI# 162229910004	# Go to Focus Attendance Lesson Monitor Display Marks and check the attendance marks

The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel.

Details about each of the errors and queries found are displayed in the columns as described in the following table.

Column	Description
Type	Displays the type of validation rule: Failure (F displayed in red) indicates an error, which must be corrected. Query (Q displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary.
Sequence	Shows the error or query number.
Message	Displays the text of the error or query message.
Location	Lists the specific record containing the error or query.
Solution	Provides a suggestion on how the error can be corrected or the query checked. Many solutions have a hyperlink (indicated by a #) to the appropriate area of SIMS.

To assist in the resolution of any errors and queries:

- When the mouse pointer is hovered over a **Message**, **Location** or **Solution** cell, hover help displays the entire content of that cell.
- When the mouse pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the issue can be checked.

NOTE: A hyperlink is also indicated by a hash symbol (#) preceding the **Solution** text.

Click the appropriate hyperlink to display the specific SIMS area where the record(s) can be checked or corrected.

- The Student Search functionality can be used to display all errors and queries relating to a particular pupil/student. Enter all or part of a UPN, pupil/student's surname or date of birth in the **Student Search** field then select the required record from the **Student Search** drop-down list to populate the **Student Search** field. Click the **Find** button to display the applicable validation records.



- Click a **Solution** hyperlink to display the area of SIMS where the associated issue can be checked and/or corrected. When you return to the **Validation Errors Summary** panel, the details of the applicable pupil/student are displayed in the **Student Search** field. Click the **Find** button to display all errors and queries relating to that pupil/student.



- Use the **Errors Search** to display the required error or query you want to view. Select **ALL, ERRORS, QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.



- By default, when **ALL** is selected from the **Errors Search** drop-down list, the errors are displayed at the top of the list.

The order of the items in the list can be changed by clicking the appropriate column heading.

Error Search	Type	Error	Location	Solution
ALL	0001	UPN	Name: Abdullah, Date of Birth: 2005-05-18, Female, UPN	# Go to Focus Student Student Details and add or issue a UPN
ALL	0001	UPN	Name: Patel, Date of Birth: 2005-03-07, Female, UPN	# Go to Focus Student Student Details and add or issue a UPN
ALL	0001	UPN	Name: Henderson, Jack, Date of Birth: 2010-09-07, Male, UPN: 400239974029	# Go to Focus Student Student Details Ethnic/Cultural and enter First language
ALL	0001	UPN	Name: Bano, Kati, Date of Birth: 2005-07-10, Female, UPN: 400239974029	# Go to Focus Student Student Details Address and add pupil's address
ALL	0001	UPN	Name: Sengul, Skanala, Date of Birth: 2003-03-26, Female, Age: 13, UPN: 86320040668	# Go to Focus Student Student Details and enter pupil's date of birth
ALL	0001	UPN	Name: Bannoun, Hugo, Date of Birth: 2010-02-03, Male, UPN	# Go to Focus Student details and check the Applies pupil record

The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.

- View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the **Report** button (located at the left-hand side and directly above the **Validation Errors Summary** panel). The report is displayed in your web browser, e.g. Internet Explorer®, where it can be printed or transferred to another application, if required (please see Transferring Report Data to a Spreadsheet on page 45).

The report (Validation Errors Summary .HTML) is saved automatically in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser. The original report, which was generated when the **Create & Validate** button was clicked (e.g. <LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_ValidationErrorsSummary .HTML), is also stored in this folder.

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

Resolve as many errors and check as many queries as possible then revalidate the return details. Continue to resolve failures and revalidate the return as many times as necessary.

NOTE: All errors must be resolved and all queries must be investigated.

If at any point you wish to hide the list of error and queries, click the **Close** button located at the top right-hand side of the **Validation Errors Summary** panel. The list is displayed again when the Create and Validate process is run.

Many of the errors generated can be fixed quickly using bulk update functionality (via **Routines | Pupil (or Student) | Bulk Update**). For more information, please refer to the *Managing Pupil/Students* handbook.

In addition to the **Validation Errors Summary**, an Errors and Resolutions document containing a list of all errors/queries that can be generated is being produced. Explanations and information on how to resolve the errors or whether the queries can be ignored are also included. The document can help to identify the order in which errors should be corrected. For example, if a UPN is missing, several UPN related errors might be generated. Therefore, adding missing UPNs can remove several errors.

Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return. The reports can be produced as soon as the return has been created and validated.

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Pupil (or Student)s** who are listed in the report.

Also included in the report header is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

The following reports are currently available:

On-Roll Basic Details Report

Report Criteria: Pupil/students on-roll on census day.

Where applicable, this report provides the following information about pupil/students who are on-roll on census day: UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission (DOA), enrolment status, language, nationality, country of birth, class type, Youth Support Services Agreement (YSSA) status, part-time status, boarder indicator.

*NOTE: Where a pupil/student is in a year group that is different to that expected (based on their date of birth), the applicable **Year Taught In** cell is highlighted in yellow.*

Leavers Basic Details Report

Report Criteria: Pupil/students not on-roll on census day who:

- Leavers with attendance 1 term ago (01/01/2017 to 16/04/2017)
- Leavers with exclusions 2 terms ago (01/09/2016 to 31/12/2016)
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded (01/08/2016 to 18/05/2017).

Where applicable, this report provides the following information about pupil/students not on-roll on census day: UPN, ULN, former UPN, legal surname, legal forename, middle name(s), former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving, language, nationality, country of birth, part-time status, boarder indicator, attendance, exclusions and Learner Support.

Exclusions Report

Report Criteria: On-roll pupil/students and leavers with exclusions two terms ago (01/09/2016 to 31/12/2016). Not applicable to pupil/students who have exclusions with appeal result of **Reinstated** or **Not in the best interests of the child**.

This report provides the following details about pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), exclusion category, reason for exclusion, exclusion start date, number of session excluded from, SEN provision and on-roll status.

Attendance Report

Report Criteria: Pupil/students with attendance one term ago (01/01/2017 to 16/04/2017). On-roll pupil/students and leavers (not boarders) aged four to 15 at 31/08/2016.

This report provides basic pupil/student information (i.e. UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and on-roll status) about the pupil/students who match the report criteria.

The number of termly sessions possible and the number of termly absence sessions are shown. The columns displayed on the right-hand side of the report shows termly attendance codes for authorised absence sessions and unauthorised absence sessions. Attendance not required sessions (Y) are also shown.

Absentees Report

Report Criteria: Pupil/students who have missed 14 sessions and whose absence might need to be tracked. On-roll pupil/students and leavers (not boarders) with attendance one term ago (01/01/2017 to 16/04/2017) who were aged four to 15 at 31/08/2016.

The number of sessions possible and the number of authorised plus unauthorised absences applicable to each of the pupil/students are shown on this report.

The report also provides the following basic details about the pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), on-roll status and enrolment status.

SEN Report

Report Criteria: On-roll pupil/student with SEN Provision/Status = **S** (Statement), **E** (Education), Health and Care Plan, **K** (SEN Support). SEN Need Types ranked 1 and 2 for pupil/students with EHCP, Statement or SEN Support.

*NOTE: **A** and **P** are invalid for this return.*

This report provides a list of pupil/students who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), SEN Provision, and on-roll status.

Address Details Report

Report Criteria: Pupil/students on-roll on census day.

This report provides a list of pupil/students, their UPN, former UPN, legal surname, legal forename, middle name(s), post code, unique property reference number (UPRN), address details and the administrative area/county.

Definition:

Unique Property Reference Number (UPRN) - a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

School Dinner Taken Report

Report Criteria: Pupil/students on-roll on census day, who have taken school dinner on the reference date.

- Pupil/students in Year Taught In R, 1 and 2.
- Pupil/students in year Taught In X who are aged four to six and who were born between 01/09/2009 and 31/08/2012 inclusive (**Special schools only**).

The report header also displays the total number of pupil/students, the total number of school dinners taken and the total number of school dinners not taken.

This report provides the following information about pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and school dinner taken (yes/no).

Free School Meal Eligibility Report

Report Criteria: On-roll pupil/students on census day who were eligible for free school meals on or after 20/01/2017 and up to and including census day.

This report provides information on free school meal eligibility for pupil/students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), on-roll status and free school meal eligibility start date, end date and the UK country in which the eligibility applies.

NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.

Only Free School Meals records where the country recorded is England or <blank> attract the Pupil Premium.

Learner Support Report

Report Criteria: On-roll pupil/students and leavers aged 16 plus at 31/08/2016 who have been awarded Vulnerable Group and/or Discretionary Bursary funding from 01/08/2016 to 18/05/2017.

This report provides information about the applicable pupil/students: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), Learner Support and on-roll status.

Top-up Funding Report

Report Criteria: On-roll pupil/students who have been awarded Top-up Funding as at census day.

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and SEN provision.

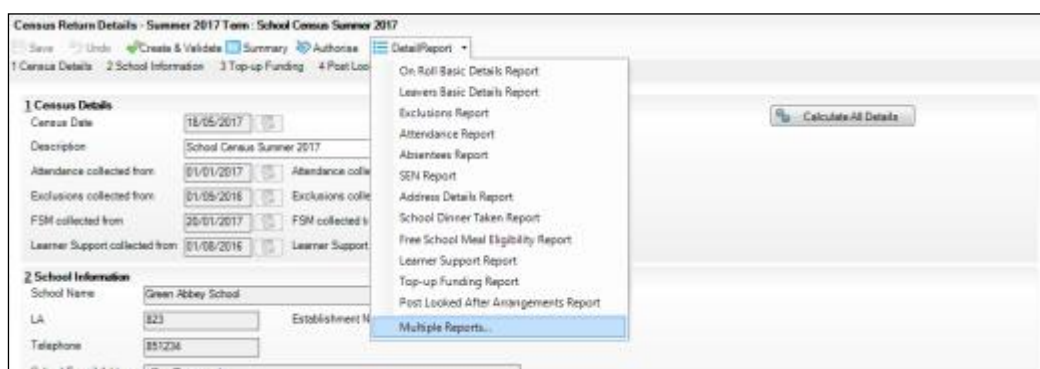
Post Looked After Arrangements Report

Report Criteria: On-roll pupil/students who have post looked after arrangements as at census day.

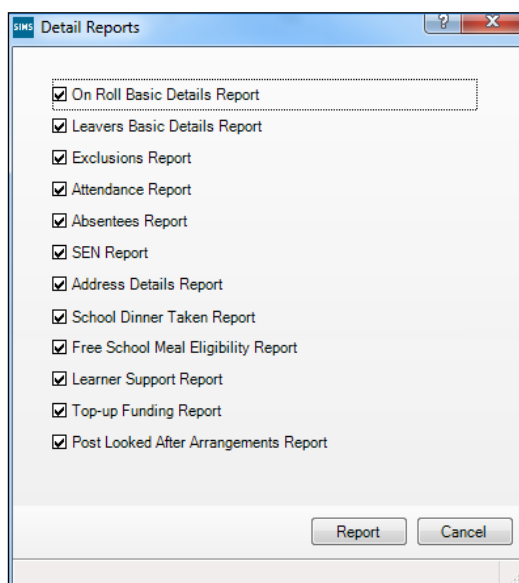
The report provides the following information about pupil/students who have post looked after arrangements: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and post looked after arrangements, e.g. ceased to be looked after through a special guardianship order (SGO).

Generating Detail Reports

To select a single detail report, select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically and displayed in your web browser, e.g. Internet Explorer®.



To select several detail reports, select **Multiple Reports** from the **Detail Report** drop-down list to display the **Detail Reports** dialog.



By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected reports.

04| Completing the School Census Summer Return

The report(s) are displayed in your web browser from where the data can be transferred to a spreadsheet, such as Microsoft® Excel, if required.

The report(s) are saved automatically in the folder specified in the **Census Return** browser, e.g. S:\SCHOOL CENSUS. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that consists of the following data fields separated by underscores ('_'):

```
<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_detail_report.html
```

For example:

8231132_SC2_823LL17_001_onroll_basic_details_report.html.

Example of an **On Roll Basic Details** report:

School Census Summer - 2017 (On Roll Basic Data)

Security Message : This report contains sensitive information.

Report Criteria: Students on roll on Census day (18/05/2017)
Total Students: 997

School Name: Green Abbey School FileRef Number: 800 (SMA) ref
 Filename: 0234321_SC2_823LL17_001.LNA Report Created: 27/01/2017
 SML Version: 1/8/2016 2016.1.1 - Released 2016.04.07 ExtraList 2016.1.1 - Released 2016.04.07 Summary 2016.1.1 - Released 2016.04.07

UPN	ULN	Legal Surname	Legal Forename	Preferred Surname	Former Surname	DOB	Gender	YTI	DOA	Enrolment Status	Language	Nationality	Country of Birth	Class Type	YSSA	Part-time Status	Disorder
8820432112954	1111178558	Adams	Gillian	Adams	-	28/06/2002	Male	8	03/08/2014	Single Registration	English	United Kingdom	-	Other	Obtained	No	Not a Disorder
8820432110205	1111171875	Ashley	Denise	Ashley	-	24/07/2000	Female	12	01/08/2014	Single Registration	English	United Kingdom	United Kingdom	Other	Refused	No	Not a Disorder
8820432111420	1111178811	Ashley	Dean	Ashley	-	16/06/2002	Male	5	03/08/2014	Single Registration	English	United Kingdom	United Kingdom	Other	Obtained	No	Not a Disorder
8820432111004	1111178822	Ashraf	Amal	Ashraf	-	13/12/2000	Male	11	03/08/2014	Single Registration	English	United Kingdom	United Kingdom	Other	Refused	No	Not a Disorder
8820432111308	1111178817	Ash	Cameron	Ash	-	10/12/2000	Male	11	03/08/2014	Single Registration	English	United Kingdom	United Kingdom	Other	Refused	No	Not a Disorder
8820432111308	1111178805	Ashington	Robert	Ashington	-	20/12/2000	Male	11	03/08/2014	Single Registration	English	United Kingdom	United Kingdom	Other	Refused	No	Not a Disorder
8820200-09281	1111178834	Ashwin	Samy	Ashwin	Orag	10/12/2001	Male	6	01/08/2014	Single Registration	English	United Kingdom	United Kingdom	Other	Refused	No	Not a Disorder
8820200-07301	1111178803	Ashwin	William	Ashwin	-	11/05/1990	Male	22	01/08/2014	Single Registration	English	United Kingdom	United Kingdom	Urnough	Obtained	No	Not a Disorder
8820200-09028	1142338530	Aslan	Jordan	Aslan	-	11/02/2004	Male	3	03/08/2014	Single Registration	English	United Kingdom	United Kingdom	Continued	Refused	No	Not a Disorder

Printing a Report from your Web Browser

IMPORTANT NOTE: Any printed reports containing information that could identify a person (e.g. their name, address, UPN, etc.) should be used for validation purposes only and should not be retained. The Security Message (displayed at the top of each report) can be customised to include instructions for the destruction of the printed reports, if required.

1. With the generated report displayed in your web browser, select **File | Print** to display the **Print** dialog.
2. Ensure that the print settings are correct then click the **Print** button.
3. Click the **Close** button on the top right-hand corner of the web page to close the report and return to the census page.

Transferring Report Data to a Spreadsheet

Transferring a report to a spreadsheet application enables the data to be sorted, the column order to be changed, etc.

In your web browser, right-click the report then select the required option, e.g. **Export to Microsoft Excel**, from the drop-down list.

The spreadsheet contains the same level of sensitive information as the original HTML report from which it was transferred therefore, it is important that the file is saved to a folder with the same level of security.

Deleting Temporary Web Browser Files

It is recommended that, after viewing statutory returns reports, you delete any temporary web browser files to ensure that any cached data (i.e. data stored on the PC itself, which enables high-speed access to previously viewed data) is removed.

This prevents the information, e.g. copies of web pages that are stored in the local cache for faster viewing, remaining on the hard disk of the PC in the temporary directory, where they are not secure because they can still be accessed.

Deleting the cache in Internet Explorer 10

1. Select **Tools | Internet options** to display the **Internet Options** dialog.
2. Select the **General** tab.
3. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.

All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.

5. Click the **OK** button.

Deleting the cache in Internet Explorer 8 and 9

1. Click the **Tools** button located at the far right-hand side of the toolbar.
2. Select **Internet options** from the drop-down list to display the **Internet Options** dialog.
3. Select the **General** tab.
4. In the **Browsing history** section, click the **Delete** button to display the **Delete Browsing History** dialog.
5. Ensure that the **Temporary Internet Files** check box is selected then click the **Delete** button.

All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.

6. Click the **OK** button.

Producing the Summary Report

The Summary report enables the accuracy and completeness of the return to be assessed by the school staff involved in preparing the return. It can also be used to assist the Head Teacher in the checking of data before authorising the return.

NOTE: When the return is authorised, the Summary report is automatically generated and displayed in your web browser, e.g. Windows® Internet Explorer.

Generating the Summary Report

When the return is authorised, the Summary report is automatically generated and displayed in your web browser. However, the report can be run at any time after the return is created and validated.

Click the **Summary** button located at the top of the **Census Return Details** page. The report is automatically displayed in your web browser, e.g. Internet Explorer, but can be transferred to a spreadsheet, such as Microsoft® Excel, if required.

The report is saved automatically in the folder specified in the **Census Return** browser, e.g. S:\SCHOOL CENSUS. For guidance on navigating to files on your local workstation when you are working in a **Hosted** environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that consists of the following data fields separated by underscores ('_'):

<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_Summary_Report.html.

For example: 8231132_SC2_823LL17_001_Summary_Report.html.

It is important that the Head Teacher checks all the information on the Summary report before the return is authorised. Your LA/DfE might request a copy of the Summary report (which is automatically generated when the return is authorised) to be signed by the Head Teacher and sent to the LA/DfE when the return has been authorised.

Editing an Unauthorised Return

The return details, e.g. **Description**, **School Information**, etc. can be edited via the **Census Return Details** page at any time prior to authorisation.

IMPORTANT NOTE: An authorised return cannot be edited. If changes are required to an authorised return, use the **Copy** facility to produce a duplicate return (with a unique description) in which the changes can be made.

1. Select **Routines | Statutory Returns | <census name>** to display the browser.
2. Ensure that the **Census Folder** and the **Security message for Reports** are correct then click the **Search** button to display any previously created returns. Unauthorised returns can be recognised by their .UNA suffix.
3. Double-click the required return. Alternatively, highlight the required return then click the **Open** button to display the **Census Return Details** page.

4. Edit the return details as required.
5. Ensure that the correct value for historical spot allowances has not been specified via **Tools | Setups | Employment Parameters**.
6. Click the **Create & Validate** button to display the **Validation Errors Summary** panel.
7. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.
8. Repeat the editing process again, if necessary.
9. Click the **Save** button.



More Information:

Configuring the Census Folder on page 10
Specifying the Security Message for Reports on page 11
Resolving Validation Errors and Checking Queries on page 37
Producing Detail Reports on page 40
Producing the Summary Report on page 46

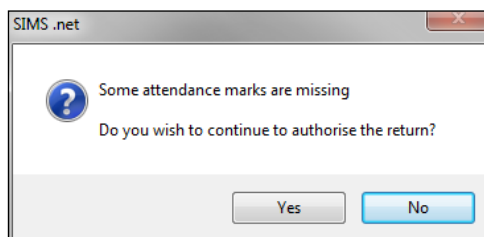
Authorising the Return

A return must be authorised before it can be submitted to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

Before authorising the return, you should ensure that all the information displayed on the **Census Return Details** page is correct and does not require further editing. This is because it is not possible to edit details after the return is authorised. The Summary report can assist in reviewing the information.

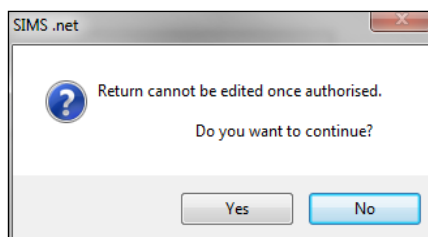
1. Click the **Authorise** button.

If missing marks exist, the following message is displayed.



2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

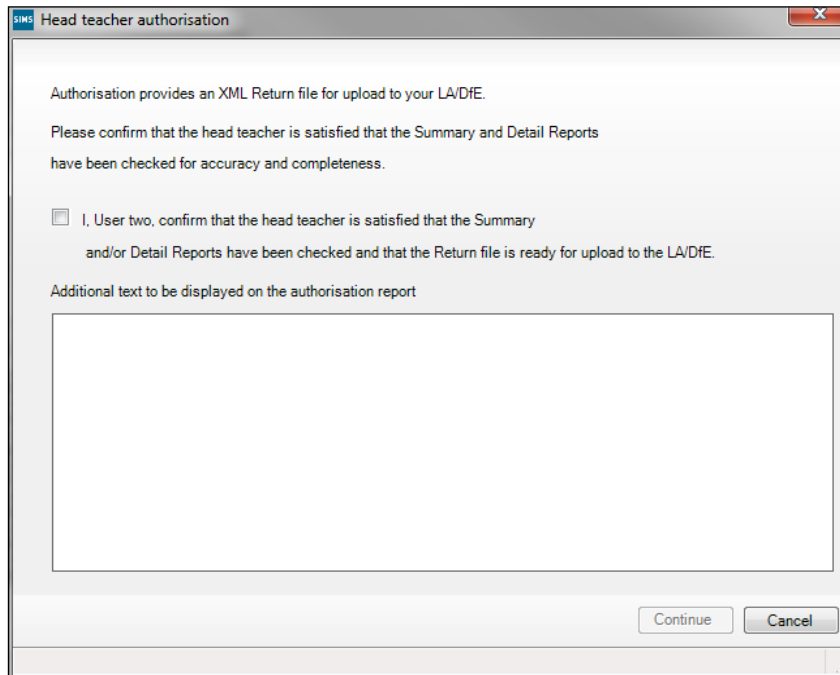
If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.



04 | Completing the School Census Summer Return

3. Click the **Yes** button to continue or the **No** button to return to SIMS where edits can be made to the data before authorising.

If you choose to continue, the **Head teacher authorisation** dialog is displayed.



The screenshot shows a dialog box titled "SIMS Head teacher authorisation". The text inside reads: "Authorisation provides an XML Return file for upload to your LA/DfE. Please confirm that the head teacher is satisfied that the Summary and Detail Reports have been checked for accuracy and completeness." Below this is a checkbox with the text: "I, User two, confirm that the head teacher is satisfied that the Summary and/or Detail Reports have been checked and that the Return file is ready for upload to the LA/DfE." Underneath the checkbox is a text area labeled "Additional text to be displayed on the authorization report". At the bottom right are two buttons: "Continue" and "Cancel".

4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.
5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.
When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
6. Click the **Continue** button to authorise the return.
 - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.
 - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).

- All details, i.e. the reports and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser.

All reports can be viewed via **Tools | Statutory Return Tools | Retrieve Authorised Census Return Files**. This routine also provides the opportunity to download the files to a different folder.

IMPORTANT NOTE: *Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.*

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

If you authorise a return and subsequently need to make amendments, you must either make a copy of the return and work on the copy, or create a new return.

After the return is authorised, reports based on cohorts can be created (via **Reports | Design Reports**), so that items collected in the return can be tracked. Provided that **Student** has been selected as the data area, the Statutory Returns sub-report is available for selection when specifying the fields to be included in the report (the last node).



Additional Resources:

Designing and Running Reports handbook



More Information:

Producing the Summary Report on page 46

Retrieving Authorised Census Return Files on page 50

Copying a Return on page 51

Submitting the Return

When the return has been completed and the Summary report has been signed by the Head Teacher (if requested to do so by your LA), the .XML file can be uploaded to the DfE COLLECT data collection website or sent to your LA, depending on the instructions you have been given.

The authorised return file is located in the folder previously specified in the return browser. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

IMPORTANT NOTE: *An authorised file cannot be edited. If you need to make changes to an authorised file, you must make a copy of the original file, rename it and work on the copy.*



More Information:

Configuring the Census Folder on page 10

Copying a Return on page 51

Retrieving Authorised Census Return Files

Authorised returns are stored in your Document Management Server (DMS). The Returns Manager can download and run the reports associated with previous authorised returns enabling the data for the current return to be compared with that submitted previously.

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.
2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.
3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:
 - a. Click the **Select a Folder** button (...) to display the **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

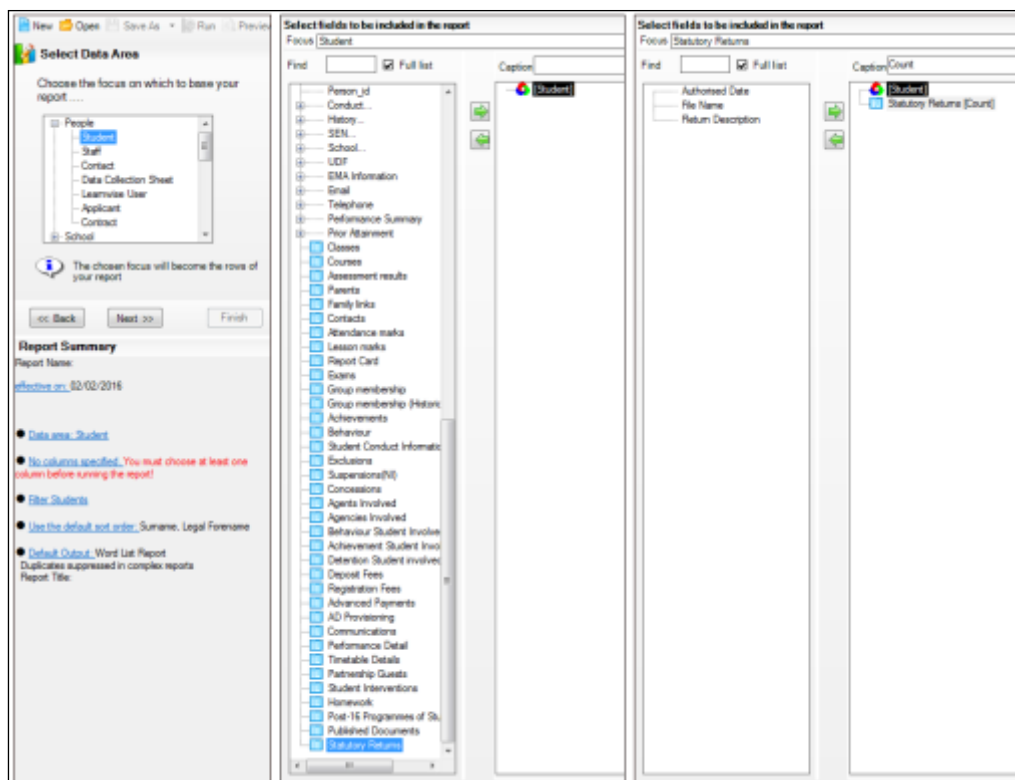
IMPORTANT NOTE: *Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.*

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

- b. Click the **OK** button to select or create the folder then return to the **Retrieve Authorised Return Files for <census name>** page where the chosen folder name is displayed in the **Download to** field.
4. Highlight the return you wish to retrieve then click the **Retrieve Files** button. The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.
5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

If you want to create reports based on cohorts, so that items collected in the return can be tracked, a sub-report is available (via **Reports | Design Reports**).

The Statutory Returns sub-report is available if **Student** has been selected as the Data Area. When selecting the fields to be included in the report, the Statutory Returns sub-report is located at the bottom of the list (the last node). Three options are available for selection under the sub-report: **Authorised Date**, **File Name** and **Return Description**.



Additional Resources:

Designing and Running Reports handbook

Copying a Return

An unauthorised return can be copied and saved as a new return. This enables a 'snapshot' of a return to be taken at any time providing a backup of any manual changes that have been made to the return, for example before recalculating details.

This functionality can also be used to make a copy of an authorised return if the LA or DfE requires it to be resubmitted. The necessary corrections can then be made to the data. The copied return must be saved, created, validated and authorised before resubmitting.

NOTE: Ensure that the return you wish to replicate is not open at the time of copying.

1. Select **Routines | Statutory Returns | <name of census>** to display the census browser.
2. Click the **Search** button to ensure that the list of returns is displayed.
3. Highlight the file you wish to copy then click the **Copy** button.

A message requests confirmation that you wish to make a copy of the selected return.

IMPORTANT NOTE: Any values for attendance (where applicable), Early Years, Post Looked After Arrangements and Top-up Funding will *not* be copied but will be populated from the current values held in the database. The Create & Validate routine must be run to generate a new census file.

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:
Copy of <description of selected file>.
5. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

IMPORTANT NOTE: The new **Description** must be unique for this return. SIMS will not save the data if a duplicate return description is found.

Deleting an Unauthorised Return

During the return process, a number of copies of the return may be created, e.g. to track progress. When the return has been authorised successfully, it is advisable to delete any versions of the return that are no longer required. This keeps the number of files in the storage folder and listed in the browser to a minimum, therefore removing confusion and lessening the risk of selecting the wrong return.

The delete routine can be used to remove unwanted returns at any time prior to the relevant return being authorised.

IMPORTANT NOTES: When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.

Any return files that have already been authorised cannot be deleted.

1. Select **Routines | Statutory Returns | <Return name>** to display the browser.
2. Click the **Search** button to ensure that the list of return files is displayed.
3. Highlight the return file to be deleted then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.
4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

The deleted return file is removed from the browser and the storage folder, along with any associated reports.

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