End of Year Processing in SIMS

February 2024

Version 1.3

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Introduction

In order to ensure a smooth transition to the new academic year, there are several tasks to be completed in SIMS.net, both before the end of the Summer term and at the beginning of the Autumn term.

Use the following checklist for tasks to be completed **before the end of the Summer term.**

Task	Completed
Record changes to teaching staff	
Create the new academic year	
Set up the Pastoral Structure for the new academic year	
Create Intake and Admission Groups	
Import Common Transfer Files	
Check dates for part time pupils	
Record leavers	
Export Common Transfer Files	
Set up Promotion Mapping for the new academic year	
Change the status of Applications	
Allocate Applications to registration groups	
Print class lists for the new academic year	
Print registers for the new academic year	
Deal with Unexplained Absences and Missing Marks	

Use the following checklist for tasks to be completed **at the beginning of the Autumn term.**

Task	Completed
Admit Applicants	
Re-admit any returning pupils	
Enter dates/patterns of attendance for part time pupils	
Enter Free School Meal Eligibility dates	
Run Housekeeping Routines	

Before the End of the Summer Term

Record Changes to Staff

All changes to your school staff need to be recorded in SIMS.net in order that the staff records are correct in both the current and new academic years.

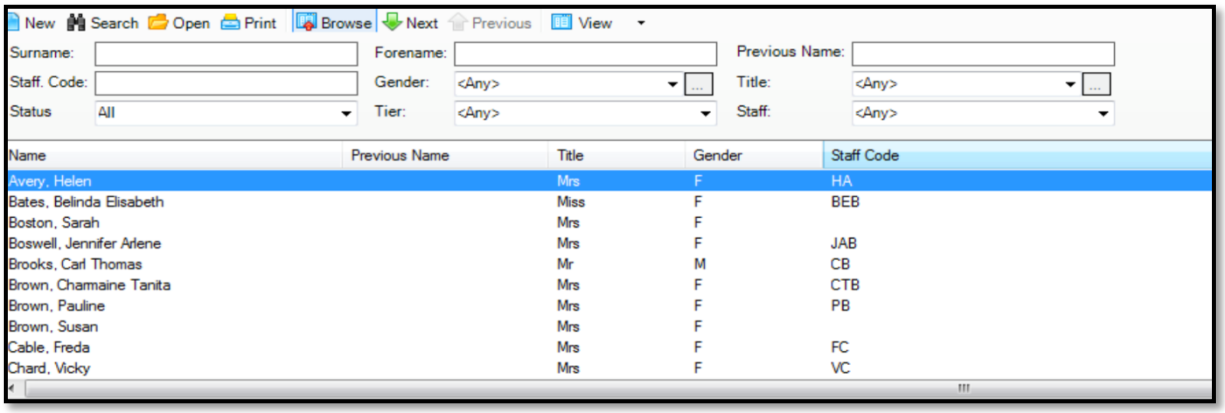
If you have new staff joining your school, their personal information should be entered as soon as it is available. This can be done in advance of their actual starting date.

If you have staff leaving your school, the leaving information should be entered as soon as possible. This can be done in advance of their actual leaving date.

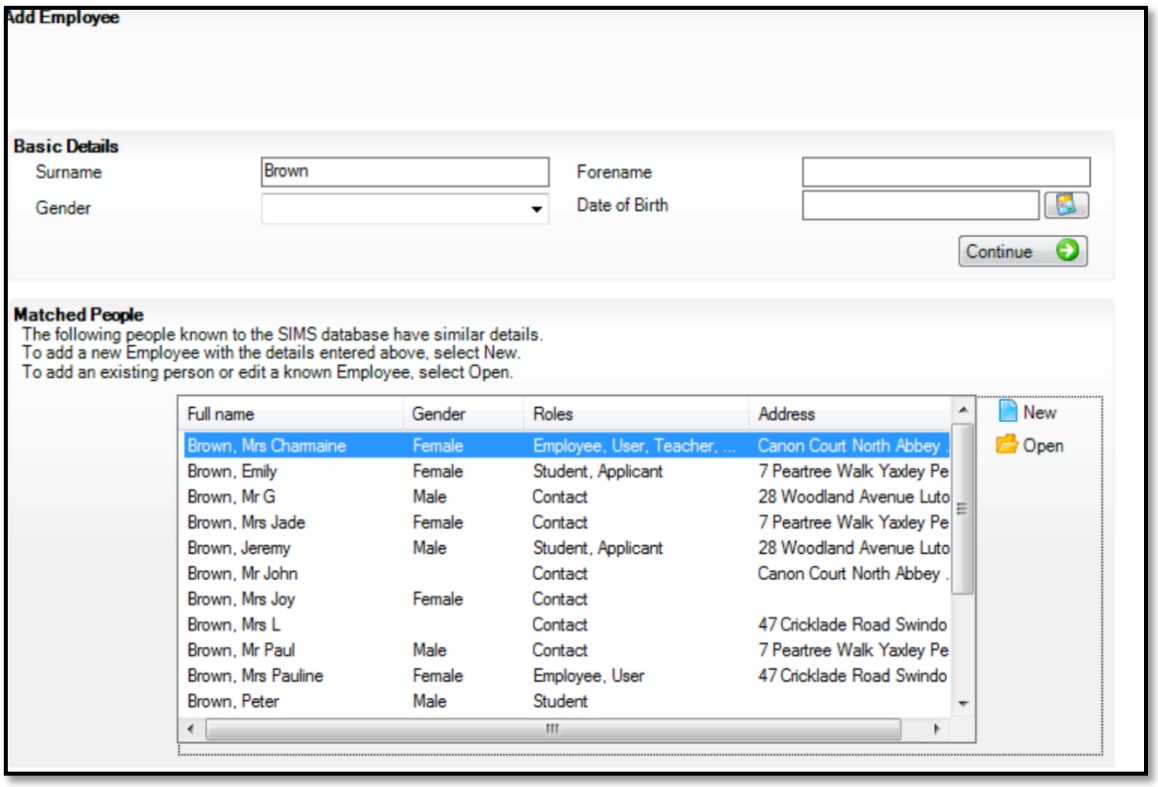
Add New Staff

Go to **Focus > Person > Staff**, change the Status to **All** and click on **Search**. Check that the member of staff to be added is not already on the list.

If the name is in the list, this indicates that the person has worked in your school in the past and already has a record in SIMS. Double click on the name and enter details of the new employment.



If the name you require is not in the list, click on **New** at the top of the screen and enter the Surname and click on **Continue**.

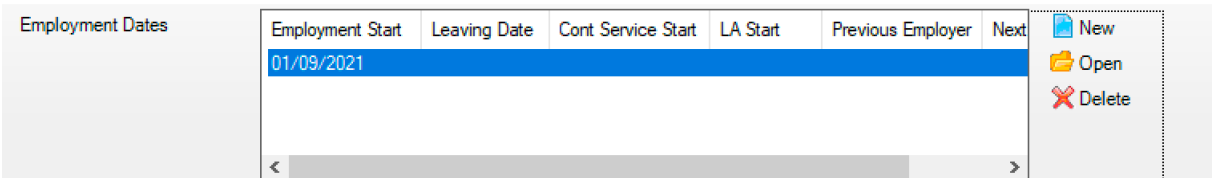


A list of matching names will be displayed. Check that the name you require is not in the list. If it is in the list, this indicates that the person already has a record in SIMS, perhaps as a Contact. Click on the name and click on **Open** to access their record and enter details of the new employment.

If it is not in the list of matching names, click on **New** on the right-hand side of the screen to open a new staff record.

Tab 1: Personal Details – Complete as much personal information as possible, including an address, telephone number and next of kin details.

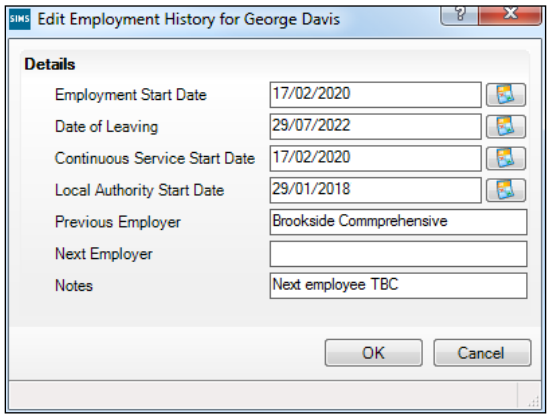
Tab 3: Employment Details – If the person is a teacher, ensure that the Teaching Staff box is ticked together with the Teacher Category, Teacher Number and Qualified Teacher Status. Enter an Employment Start Date. Note that other entries such as Contracts and Checks can be entered later as you receive the information.



Save the record and repeat the process for each new member of staff.

Add Leaving Details

Go to **Focus > Person > Staff** and click on **Search**. Double click on the name of the person that will be leaving your school and go to Tab 3: Employment Details. In the Employment Details panel, highlight the appropriate record and click on **Open** on the right-hand side of the panel.



Enter the Date of Leaving and click on **OK**. Click on **Save** at the top of the screen.

Repeat the process for each member of staff leaving your school.

Create the New Academic Year

The term dates for the new academic year need to be defined, as well as half term holidays, bank holidays and staff training days. On creation of the new academic year, attendance records for each pupil are created and registers will show the dates the pupils are expected to attend school.

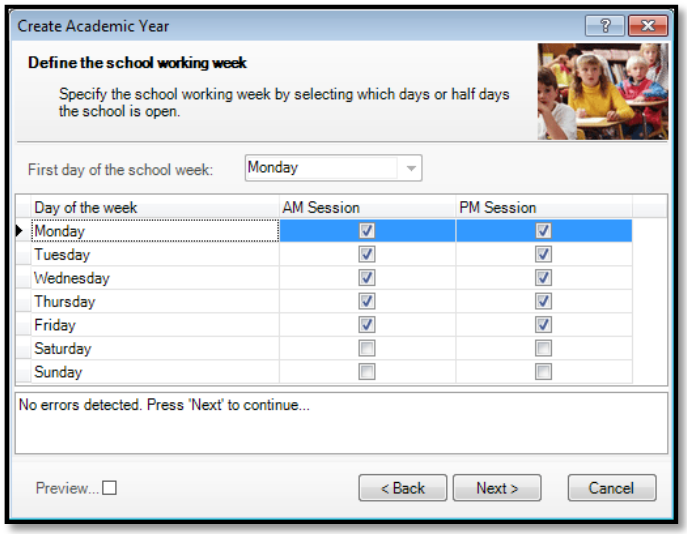
It is therefore strongly recommended that all other users should be logged out of SIMS before commencing this process.

The first day of the new academic year should be set as the first day on which staff are required to attend even if the pupils are not in school, such as a staff training day.

SIMS will move smoothly into the new academic year on the first day of the Autumn term providing that the promotion process has been carried out (see page 25).

Go to **Routines> School> Academic Year** and the **Define an Academic Year Wizard** will be displayed.

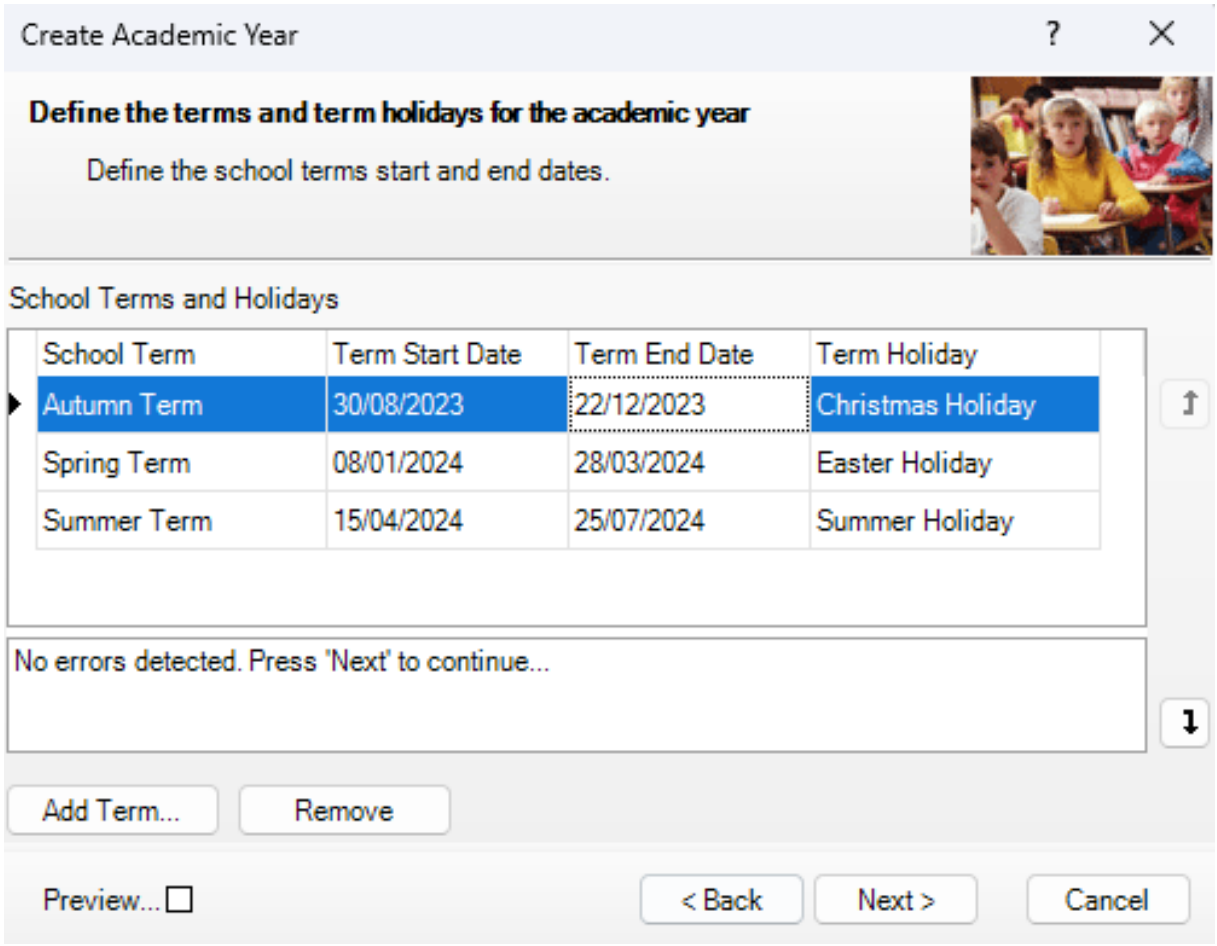
Click on **Next** to display the **Define the school working week** screen.



Check that the morning and afternoon sessions boxes are ticked for Monday to Friday and click on **Next**. A warning message will be displayed, click on **Yes**

The **Define the terms and term holidays** for the academic year screen will now be shown.

Click on **Add Term** and enter the start and end dates for the Autumn term. Repeat for each term and note that the periods between the end of one term and the start of the next are automatically shown as holidays. **Note that in the screen below the dates are for example only – you should enter the actual term dates of your own school.**

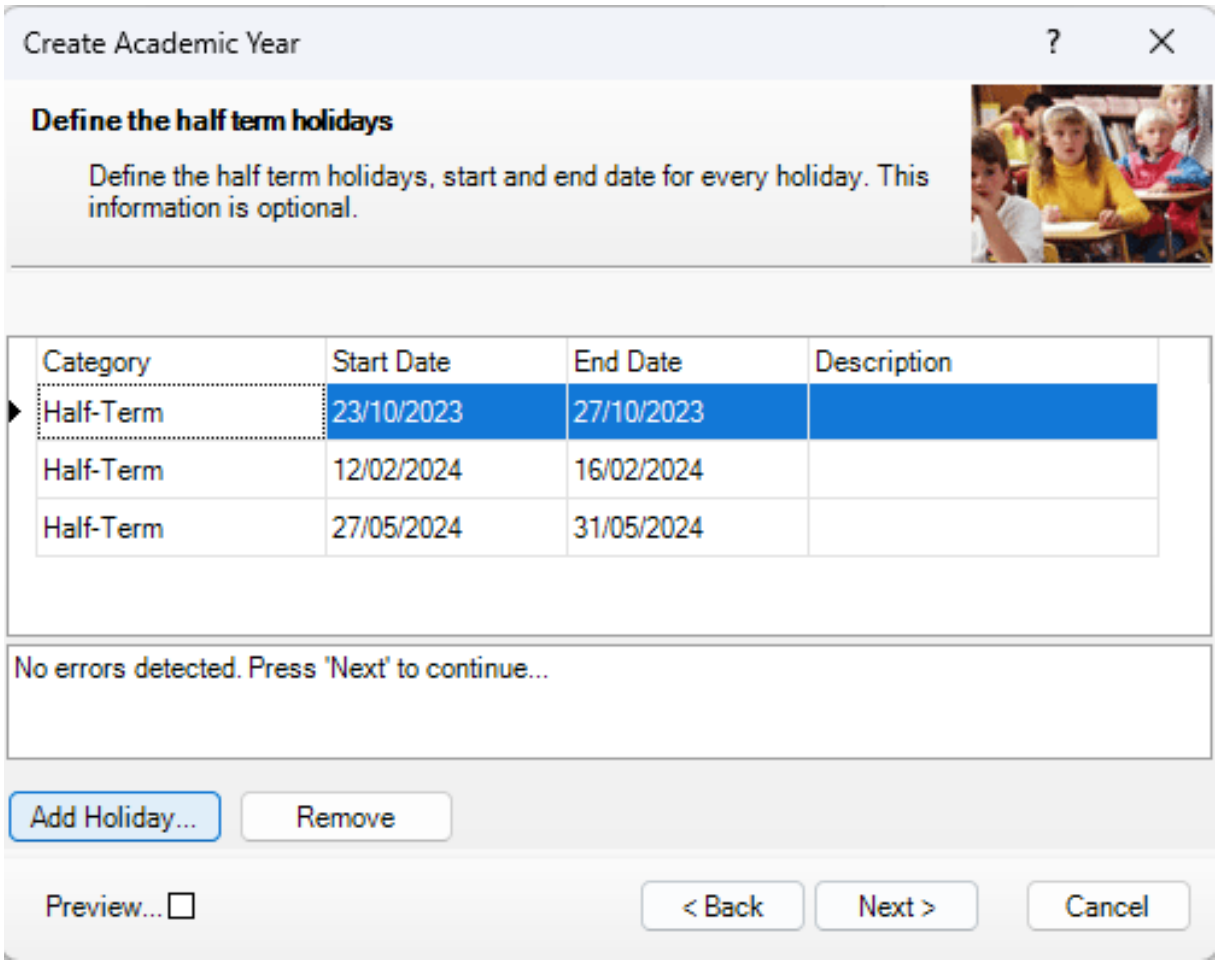


The first day of term should always be the first day that staff are required to attend. For example, using the dates shown above, if 2 September is a Staff Training Day, that is the day that should be entered as the first day of term.

Click on **Next** to display the **Define the half term holidays** screen. Note that from this point onwards you can select the **Preview** button to display an additional panel on the right-hand side of the wizard showing the information you have entered throughout the process. You can deselect the Preview check box whenever you want to hide the preview panel.

Click on **Add Holiday** enter the start and end dates for the Autumn half term holiday. The description can be edited if required.

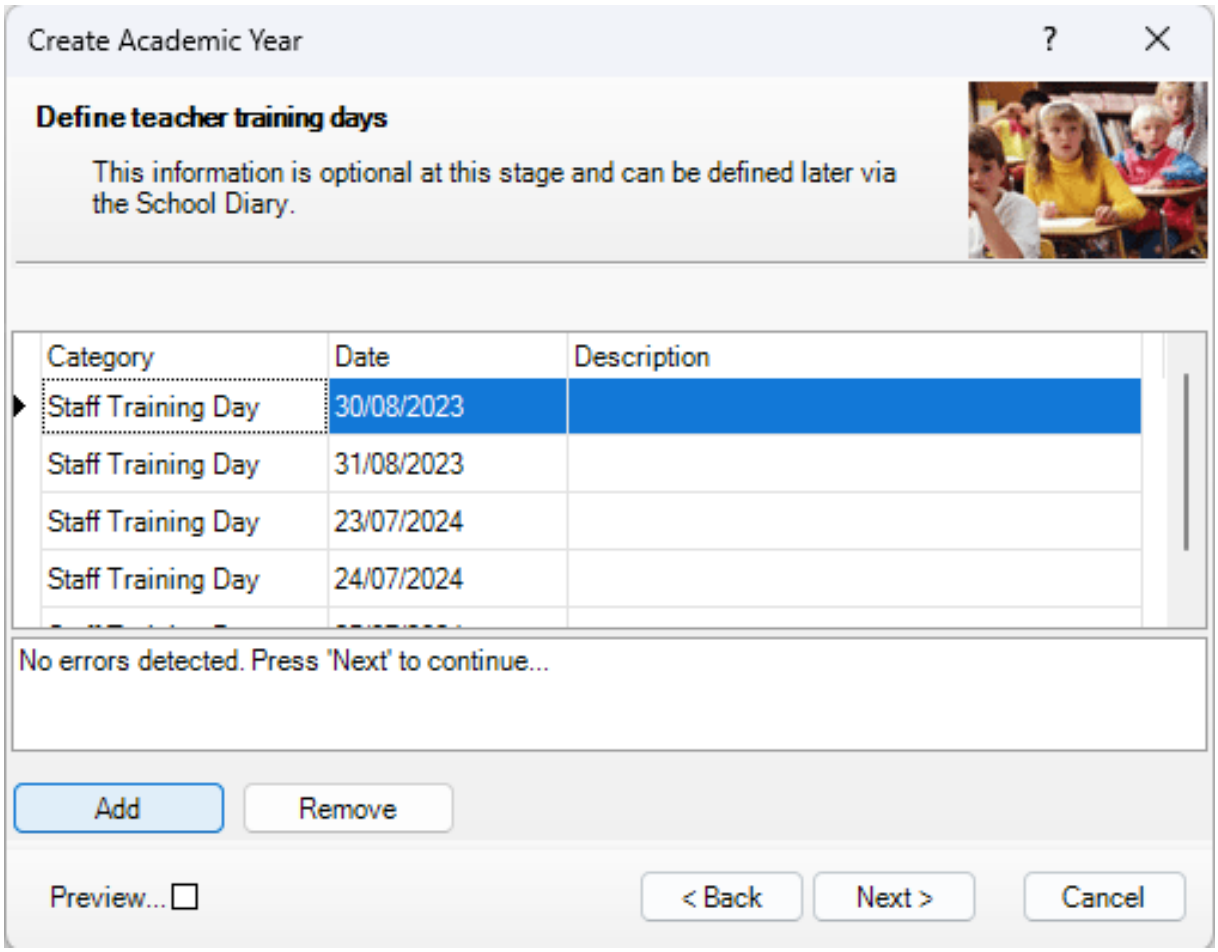
Repeat the process for each half term holiday. **Note that in the screen below the dates are for example only – you should enter the actual half term holiday dates of your own school.**



Click on **Next** to display the **Define teacher training days** screen. This is used to enter any training days where pupils will not be attending school.

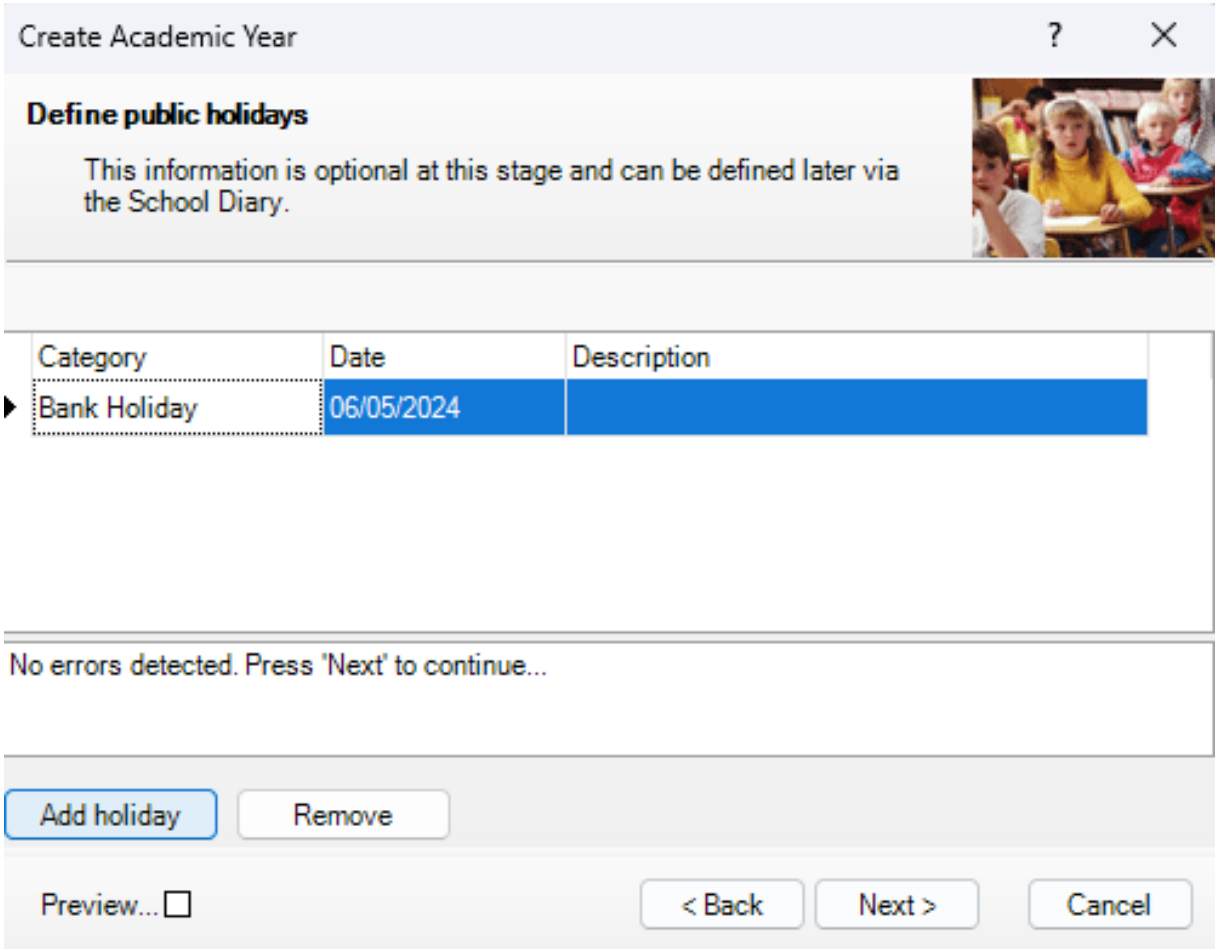
It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus > School > School Diary**).

Click on **Add** and select **Staff Training Day** from the **Category** drop down list. Enter the date and description of the first staff training day. Click on **OK** and repeat for other staff training days.



Click on **Next** to display the **Define public holidays** screen.

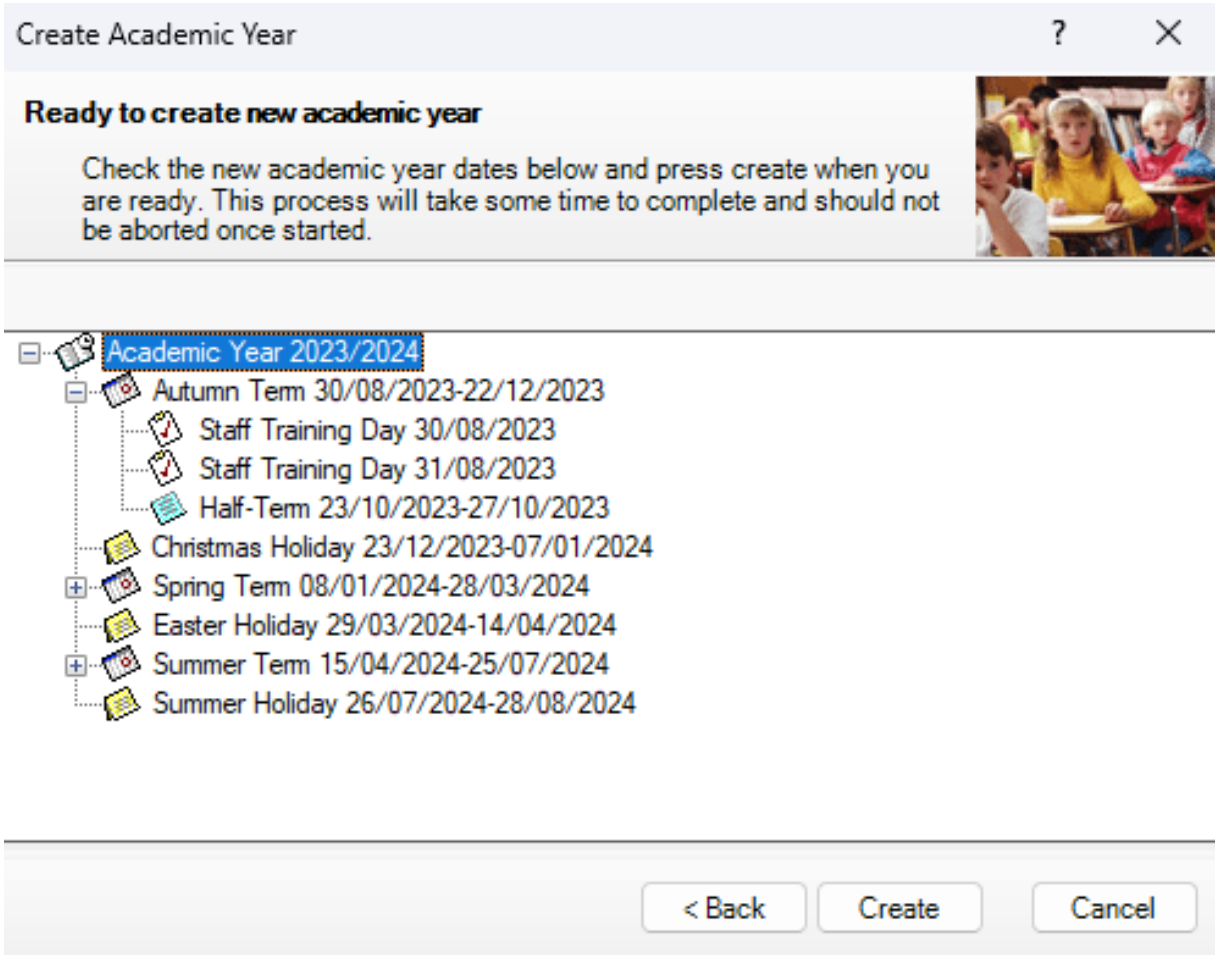
Click on **Add holiday** and select **Bank holiday** from the **Category** drop down list. Enter the date and description. Click on **OK** and repeat for other bank holidays if required.



Note that you do not need to add a bank holiday on this screen if it happens to fall in a school holiday.

Click on **Next** to display the **Ready to create the new academic year** screen.

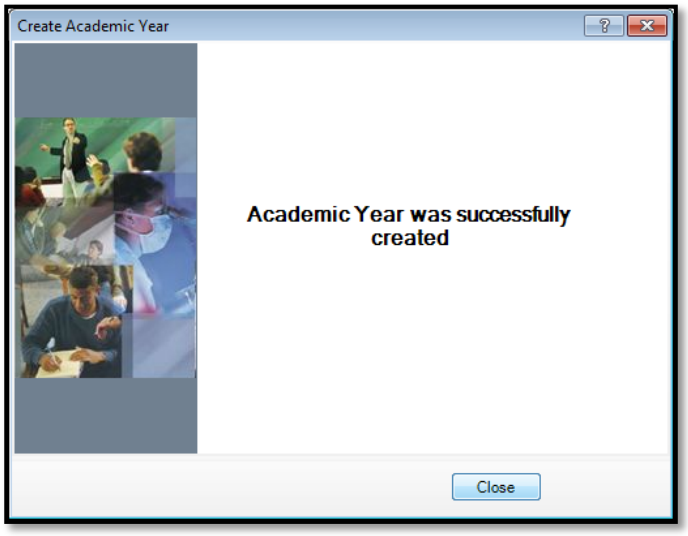
A summary of the data entered is displayed on the **Ready to create new academic year** screen. The detail for each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable + icon. **You are strongly advised to check this information carefully for any errors or inaccuracies.**



Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

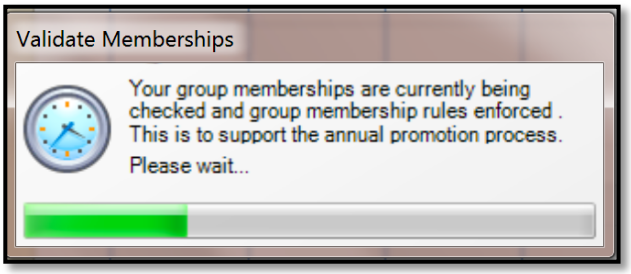
A warning message will be displayed. Click on **Yes.** Progress is displayed via a progress indicator at the bottom of the wizard.

Once complete, the final page of the wizard is displayed:



Click the **Close** button to close the wizard and complete the process.

It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools > Validate Memberships**, which displays the following:



The screen will close once the process has been completed.

Set up the New Academic Year's Pastoral Structure

The Pastoral Structure is the definition of the year and registration group organisation in your school. The structure for the new year is automatically created when the new academic year is created and is based on your current structure.

Note that in order to accommodate academic groups in secondary schools, primary school classes are referred to as Registration Groups in SIMS.

If your new year's structure is the same as for the current year, you need only make any changes to the staff attached to each class. It is not essential to assign teachers to classes at this stage. This can be done when the information is known but must be done before the start of the academic year so that Attendance records are not affected.

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

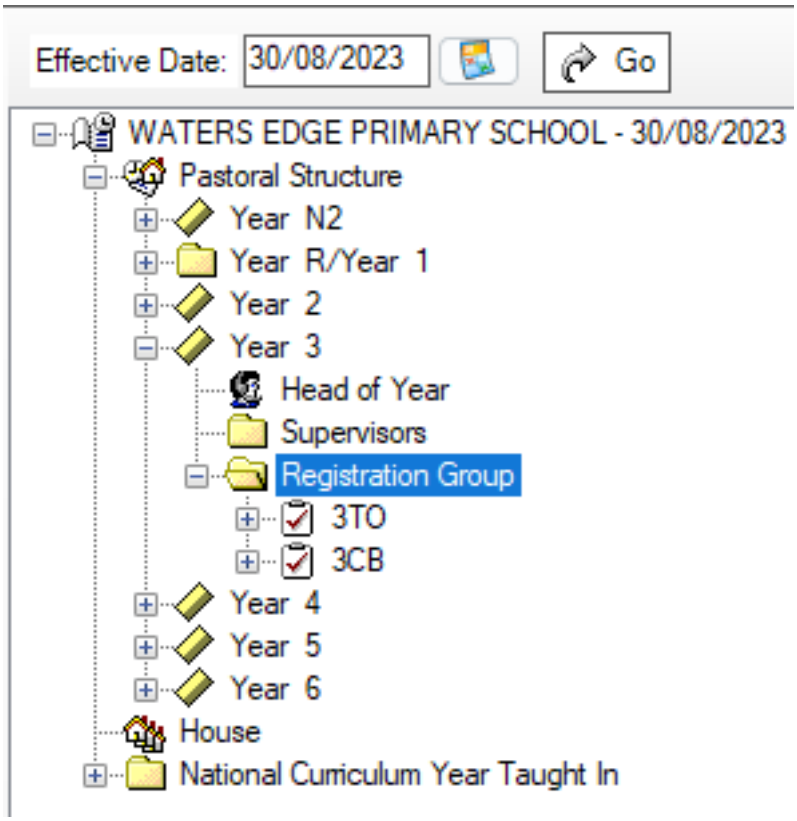
- add additional classes, where pupil numbers have increased.
- merge classes, where pupil numbers have decreased.
- add a new year group, e.g. where a Nursery has been introduced in your school.
- change class names.

If you need to change class names, you should not simply change the names in the current year as this will affect the whole history of the pupils in the class. The correct process is to go to the new year's structure and add the new classes with the appropriate name and delete the ones you no longer require.

For this reason, best advice when considering class names is as follows:

- **Do not** name your classes with teachers' names or initials, e.g. 6VC
- **Do not** name your classes according to the years they contain, e.g. Y3 or Year 3
- **Do** give your classes names that can continue year after year, e.g. Class 1, Class 2, etc, Oak, Ash, Elm, etc, Red, Blue, Green, etc

Select **Focus > School > Pastoral Structure > Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page. The **Effective Date** field should show the first day of your new academic year and should not be changed.



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

Add New Year Groups

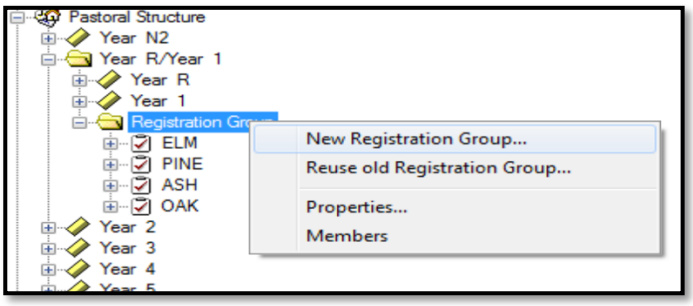
If an additional year group is required, e.g. a Nursery year has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection. If this is likely to be required by your school, please contact us for further guidance.

- By email – support@osmis.co.uk
- By telephone 0161 883 1290

Add New Registration Groups (Classes)

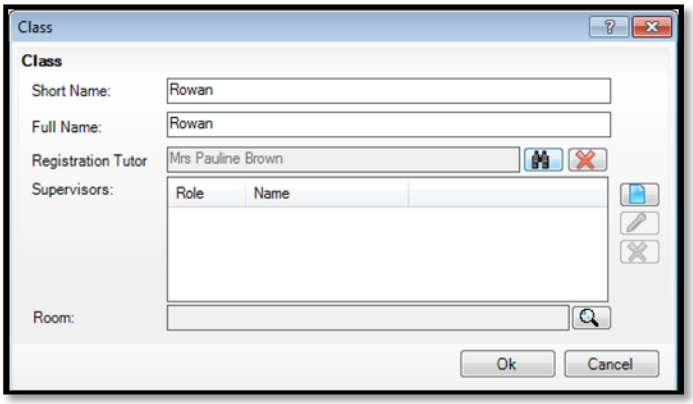
Expand the year group to which you wish to add the class by clicking the adjacent + icon.

Right click on the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the Class screen. (If you are to use a name that has been used in the past you should select **Reuse Old Registration Group** and select the name from the list shown).

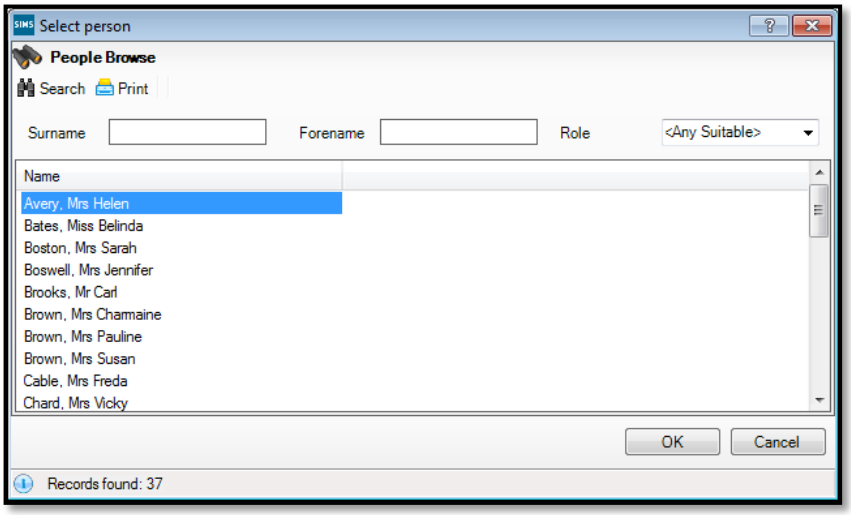


Enter a **Short Name** and a **Full Name** for the new class. (The **Full Name** is used throughout SIMS to identify the class. The **Short Name** is used for column headings in reports).

It is recommended that short names should be a short as possible – a maximum of 6 characters will appear correctly on SIMS screens and reports.



Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.



Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.

Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog. Click **OK** to return to the Pastoral Structure screen.

Save the Amended Structure

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.

Add Intake/Admission Groups

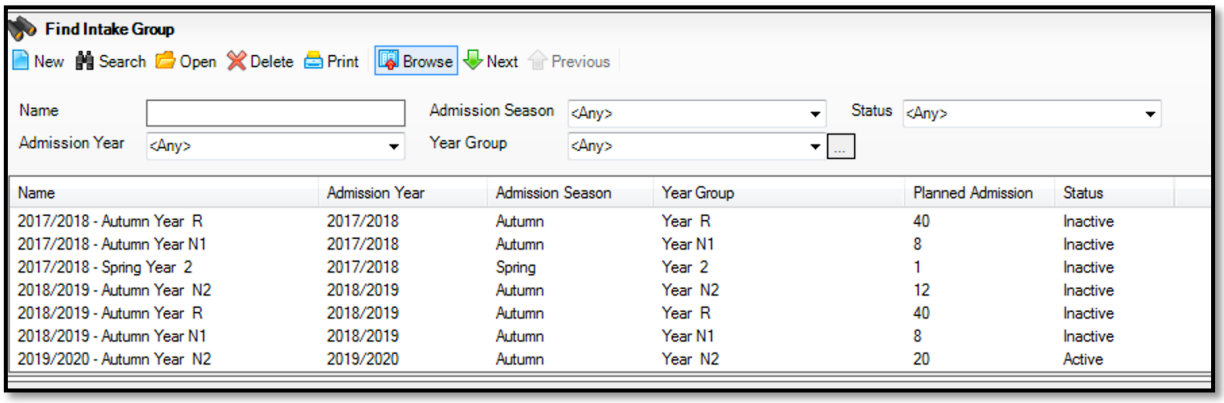
Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of separate admission groups for those joining in Autumn, Spring and Summer terms might be set up for your Nursery.

IMPORTANT NOTE: *Please ensure that the* ***Date of Admission*** *lies within the new academic year. We recommend that the date of admission is the day on which it is agreed that applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority or MAT for advice on the correct date to use if you are unsure.*

If you have previously created admission groups with an incorrect ***Date of Admission****, amending the date also amends the* ***Date of Admission*** *for every applicant who is a member of the group, (preventing the need to edit them individually).*

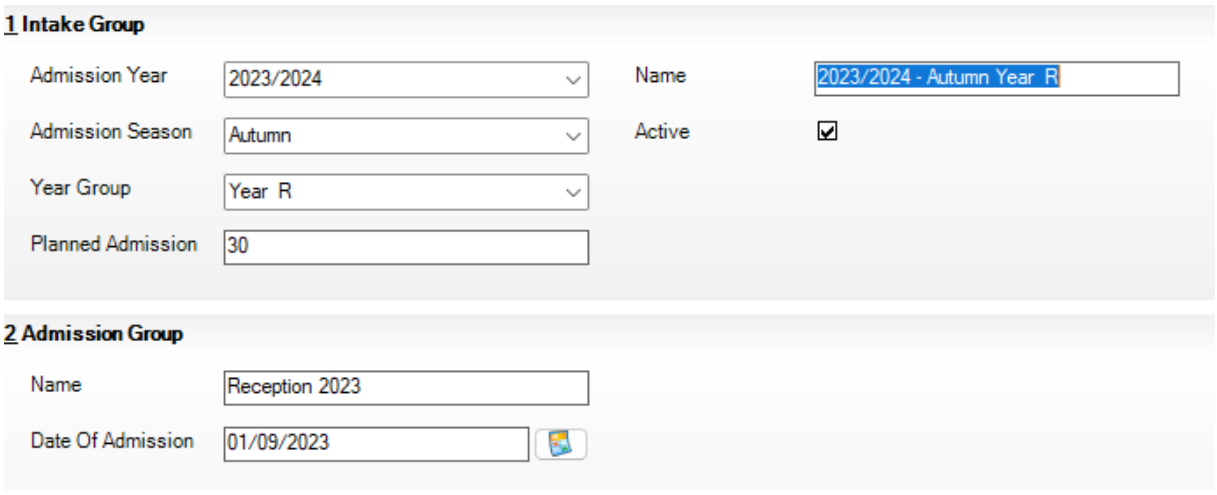
Select **Routines > Admission > Admission Groups > Setup** to display the **Find Intake Group** browser.

Click on **Search** to see the intake groups that already exist. To simplify matters please consider deleting old groups or making them inactive to hide them from the display.



Click the **New** button to display the **Intake Group Details** page.

Mandatory fields will be highlighted in red.



In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g., 2024/2025) from the drop-down list.

Select the required **Admission Season** (**Autumn**, **Spring** or **Summer**) or, if only admitting pupils in Autumn, select **Integrated** from the drop-down list.

Select the required **Year Group** the pupils will start in from the drop-down list.

Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field (you will be able to exceed this number).

If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year**, **Admission Season** and **Year Group**, e.g., **2024/2025 – Integrated Year R**. The default name can be amended, if required.

The **Active** check box is selected by default and indicates that the intake group is available for use.

In Panel 2 enter the name of the Admission Group and the expected date of admission. Ensure that this date sits within the new academic year that was defined earlier.

Note that schools with a Nursery will need to have separate Intake and Admissions Groups set up for the Nursery and Reception years **BUT** pupils in current Nursery classes should not be placed in Admission Groups for Reception, since SIMS will automatically move Nursery pupils into Reception as part of the Promotion process.

Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

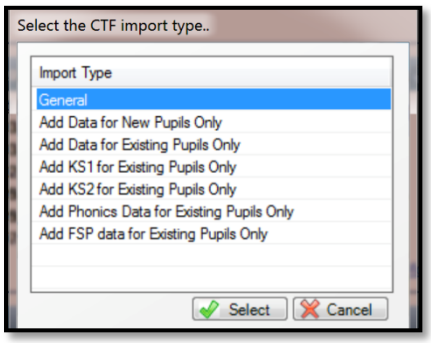
Import Common Transfer Files

Import any CTFs that have not yet been imported. Note that pupils with CTFs can be imported into an admission group or directly on-roll.

Pupils joining the school at a date in the future should be placed into the correct admission group and should not be placed on-roll.

If any of the pupils in the CTF already exist in the system, any blank fields in their record will be updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

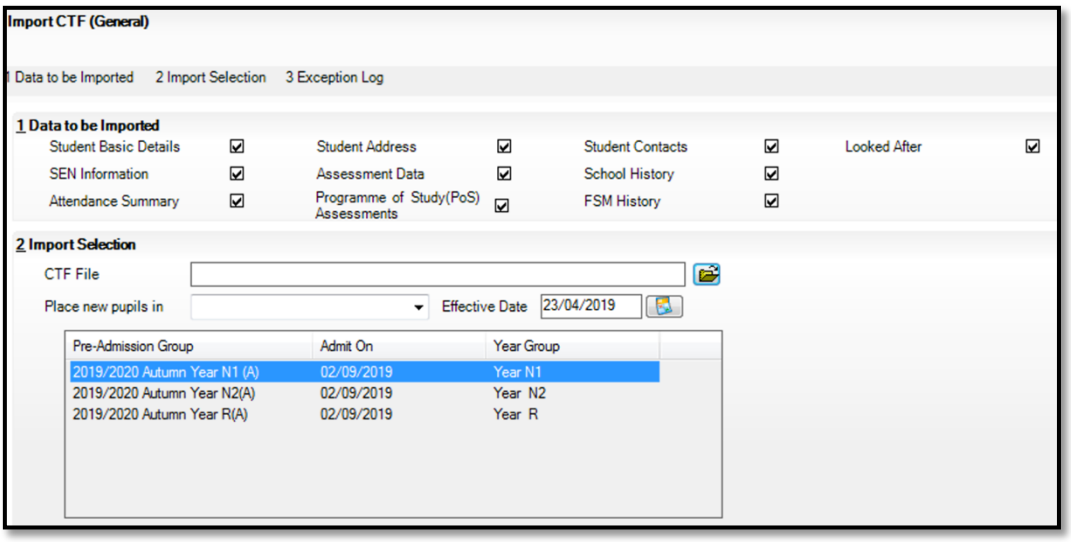
Select **Routines > Data In > CTF > Import CTF** to display the **Select the CTF import type** dialog. This dialog varies, depending on your school phase.



Highlight the required CTF import type then click on **Select.**

In the **Data to be Imported** panel, indicate the data items you wish to import from the CTF by selecting the appropriate check boxes.

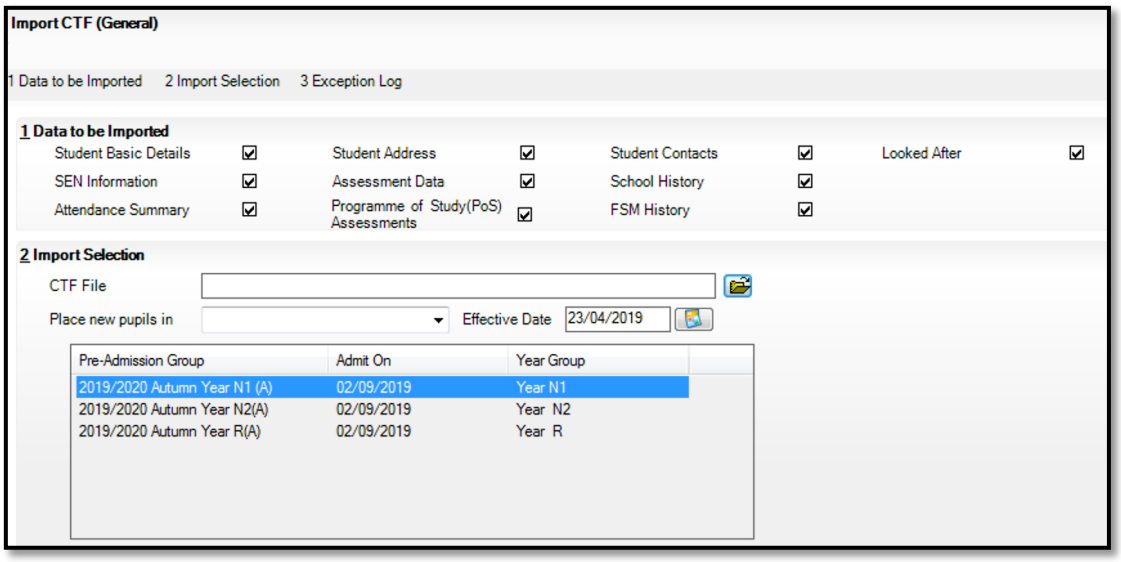
Click on **Import.**



In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button adjacent to the **CTF File** field to display the **Select Import File** dialog. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import to CTF** page.

Select **Pre-Admission** from the **Place new pupils** in drop-down list to import the pupil into an admission group. (The **On-roll** option is also available, but it is not advisable to admit future admissions directly on-roll).

Select the appropriate **Admission Group**.



Click the **Import CTF** button to start the import. Details of any errors are displayed in the Exception Log at the bottom of the **Import CTF** page.

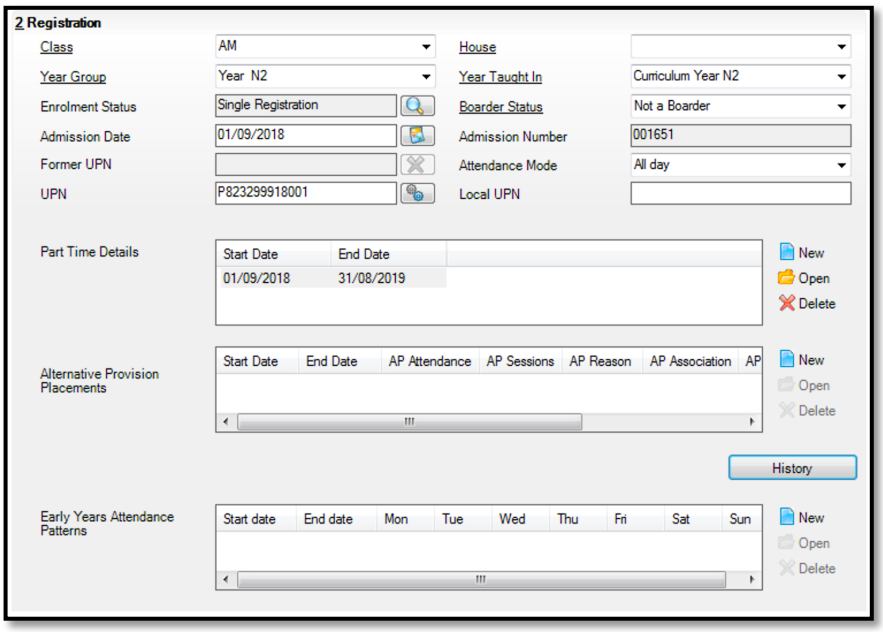
Once you have finished importing the CTF, edit the details of the imported pupils as required.

Check Dates for Part Time Pupils

To ensure that pupils who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day. This is mostly relevant to schools with a Nursery, where the part time Nursery pupils move into full time Reception. However, any pupil can be marked as part-time if their attendance is anything less than 10 sessions per week.

Select **Focus > Pupil > Pupil Details** then select the required pupil from the **Find Student** browser.

Click the **Registration** hyperlink to display the **Registration** panel.



Check or amend the **End Date** in the **Part Time Details** table for any part-time pupils who will no longer be part-time, by clicking the **Open** button to display the **Edit Part-time Attendance** dialog.

Add or edit the **End Date** as required then click the **OK** button. The **End Date** is then displayed in the **Part Time Details** panel.

Select **All day** from the **Attendance Mode** drop-down list.

Click the **Save** button to save any changes.

Record Leavers

The facility to record leavers enables accurate records to be retained of pupils after they have left the school. During the Summer term you will need to mark most, or all of the pupils as leaving on the same day. You should only mark pupils as leavers if you are sure they are leaving, e.g. Year 6 pupils moving on to Secondary school.

IMPORTANT NOTES: *It is essential that you do not record leavers by removing their date of admission as this affects all historical data relating to that pupil/student.*

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

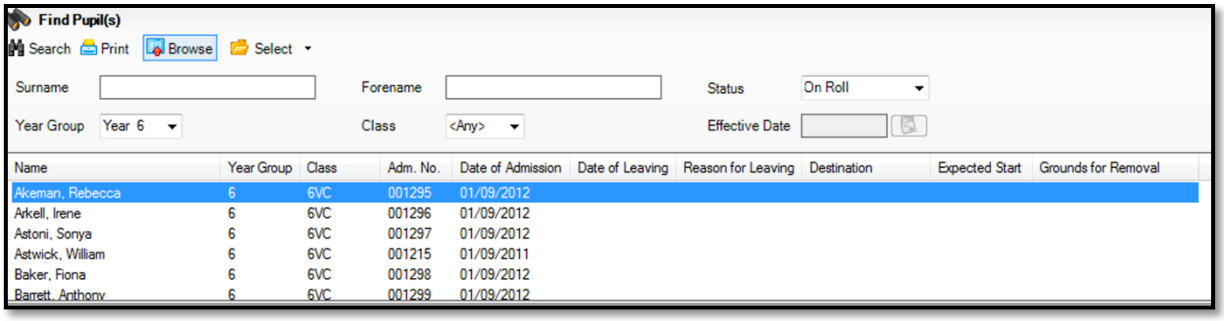
Select **Routines > Pupil > Leavers** to display the **Find Student(s)** browser.

Search for the required pupil then double-click their name to display the **Manage Pupil(s) Leaving Details** page.

To select a group of pupils, hold down the **Ctrl** key and click each pupil to be selected.

Once the required pupils have been highlighted, click the **Select** button to add them to the **Students** panel.

If you wish to assign a group of pupils as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists.



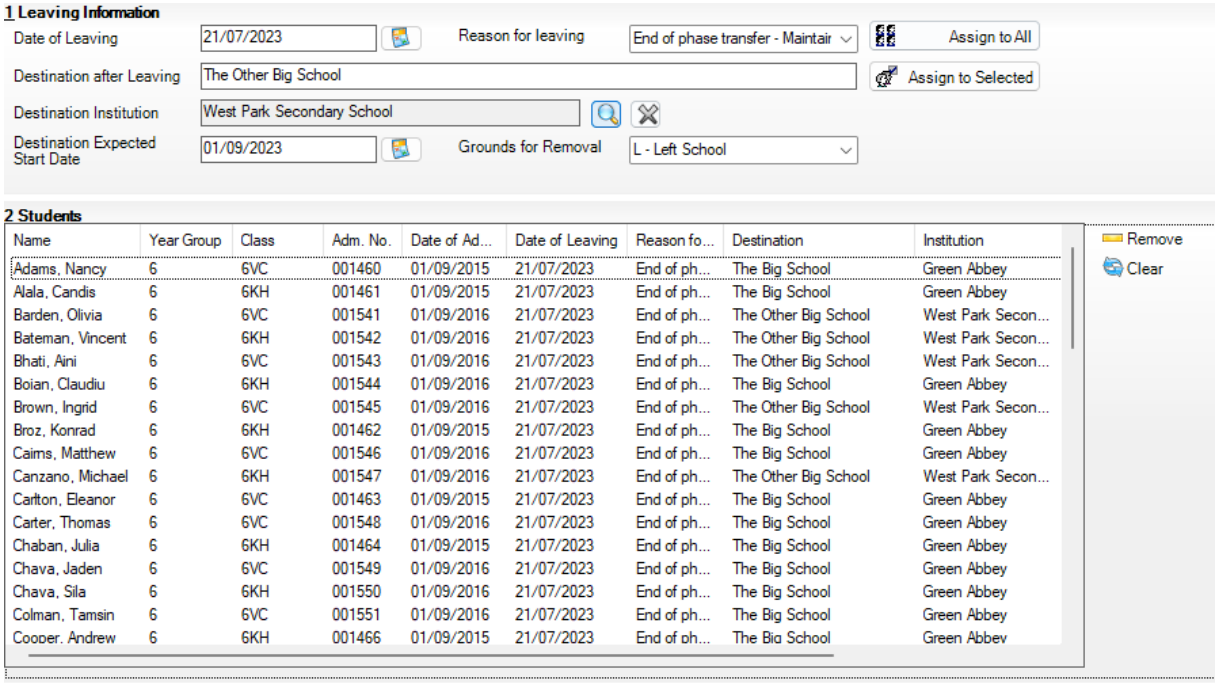
To select all the pupil/students displayed in the browser, select **All** from the **Select** drop-down menu.

In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button then select the required date.

Select the **Reason for leaving** from the drop-down list, such as **End of phase transfer - Maintained school**.

Enter the **Destination Institution** (by clicking on the magnifying glass and searching for the relevant school) and the **Destination Expected Start Date. The Destination after Leaving** is a free text field which can be used but is not a compulsory field.

Highlight the pupils to which this information applies using **Ctrl** and **click**.



Name	Year Group	Class	Adm. No.	Date of Ad...	Date of Leaving	Reason fo...	Destination	Institution
Adams, Nancy	6	6VC	001460	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Alala, Candis	6	6KH	001461	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Barden, Olivia	6	6VC	001541	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Bateman, Vincent	6	6KH	001542	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Bhati, Aini	6	6VC	001543	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Boian, Claudiu	6	6KH	001544	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Brown, Ingrid	6	6VC	001545	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Broz, Konrad	6	6KH	001462	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Cairns, Matthew	6	6VC	001546	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Canzano, Michael	6	6KH	001547	01/09/2016	21/07/2023	End of ph...	The Other Big School	West Park Secon...
Carlton, Eleanor	6	6VC	001463	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Carter, Thomas	6	6VC	001548	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Chaban, Julia	6	6KH	001464	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey
Chava, Jaden	6	6VC	001549	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Chava, Sila	6	6KH	001550	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Colman, Tamsin	6	6VC	001551	01/09/2016	21/07/2023	End of ph...	The Big School	Green Abbey
Cooper, Andrew	6	6KH	001466	01/09/2015	21/07/2023	End of ph...	The Big School	Green Abbey

Then click the **Assign to Selected** button. Or if the information applies to all the pupils in the list, click the **Assign to All** button.

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

To remove a pupil/student from the list, highlight their name then click the **Remove** button.

To clear the contents of the **Date of Leaving**, **Reason for Leaving** and **Destination Institution** columns in the **Students** panel, highlight the required pupils then click the **Clear** button. Re-enter the information as required.

Click the **Save** button to save the changes. The selected pupils are recorded with a date of leaving on the date specified.

Repeat the process for a group of pupils with a different Leaving Date or Destination.

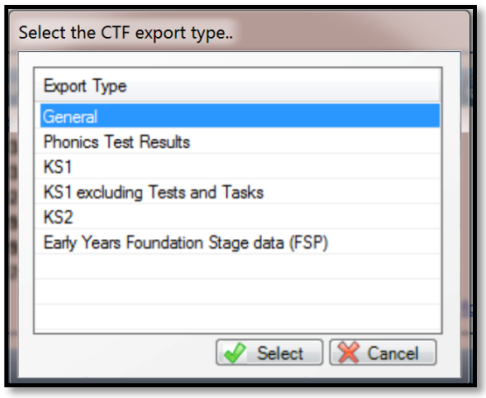
Remember to **Save** your changes.

Export Common Transfer Files

Common Transfer Files can be created and sent to other schools or Local Authorities.

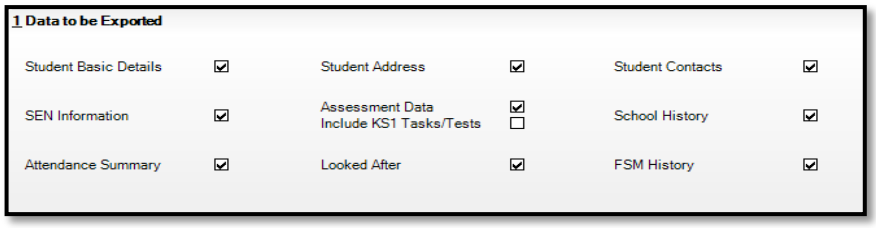
*NOTE: Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools > Other Schools** and specified the directory into which the CTF export will be saved via **Tools > Setups > CTF**.*

Select **Routines > Data Out > CTF > Export CTF** to display the **Select the CTF export type** dialog.



Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page.

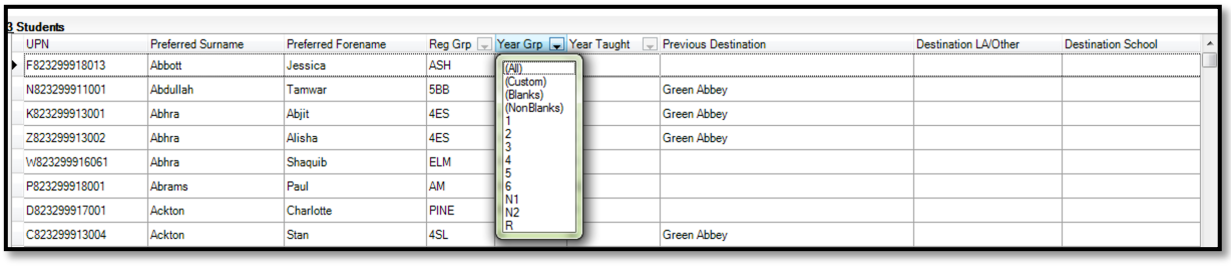
In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

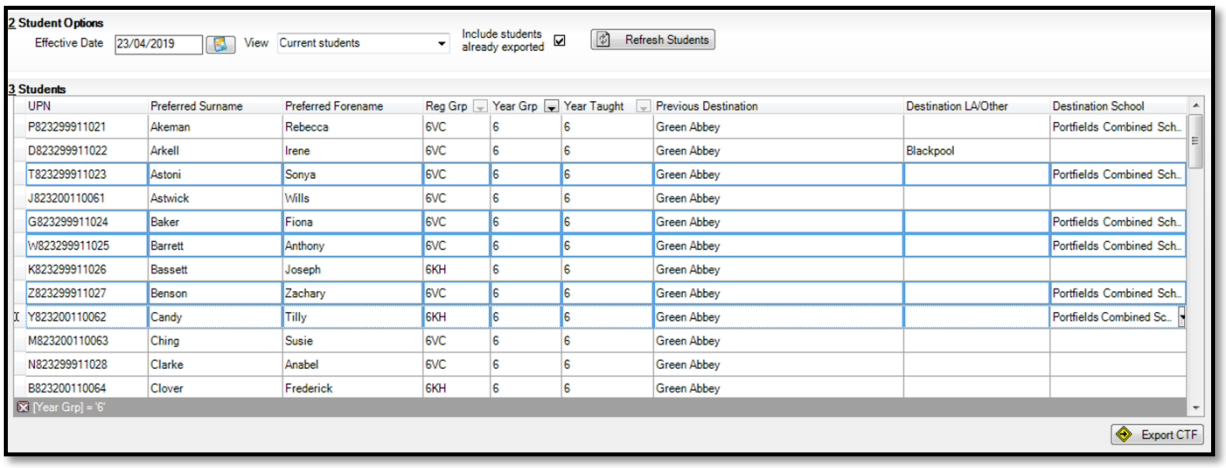


Select the status of the pupils you wish to include in the CTF file from the **View** drop-down list (e.g. **Current and Leavers this year**) in the **Student Options** panel.

Click the **Refresh Students** button to update the list of pupils displayed based on your selections. You can change the display order by clicking any of the column headings.

A single year group can be selected, such as Year 6. This is achieved by selecting the required year from the **Year Grp** drop-down list.





If you have already created a CTF file for some of the pupils but wish to include them in this CTF, select the check box to **include pupils previously exported** (for example in a CTF sending end of Key Stage information).

Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupil by holding down the **Ctrl** key and clicking each pupil to be selected.

To select all the pupils, right-click anywhere in the table then select **Select All** from the pop-up menu.

Click the **Export CTF** button to create the export file.

After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupils in the file, the number processed, and the number not exported.

Any errors causing the export to fail must be corrected before the pupils can be successfully included in the CTF export file.

Navigate to the location of the **CTF Export Directory** (as defined in **Tools > Setups > CTF**) then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer or S2S. Please contact your Local Authority if you are unsure how to transfer the CTF.

Set up Promotion Mapping for the New Academic Year

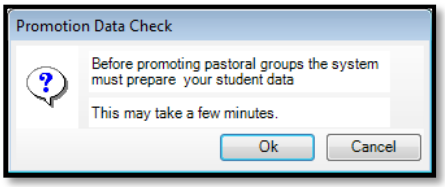
Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupils if there are any exceptions (such as a pupil not moving into the same class or year as everyone else).

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

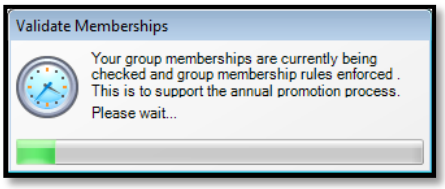
You can repeat the process a number of times until you are happy that all pupils have been mapped to the appropriate classes.

> ***BEFORE PROCEEDING:*** *Please check that you have carried out the following:*
>
> *Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).*
> *Created the new academic year.*
> *Amended the new year's pastoral structure as required, such as adding new classes.*

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



Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

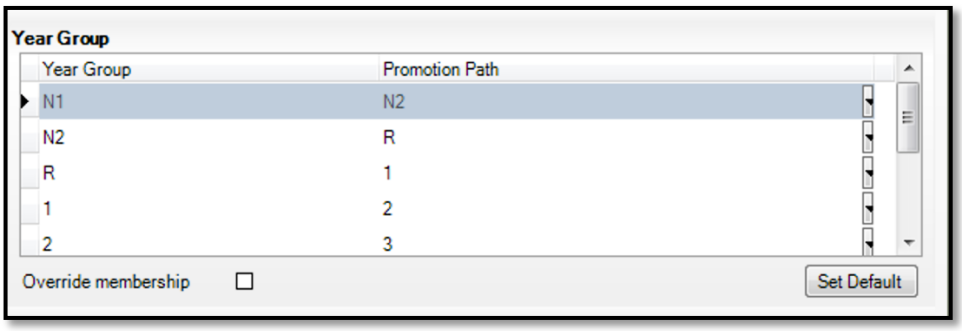
The current academic year should be shown automatically in the **Promote from** field.

If it is not selected automatically, select it from the drop-down list.

Click the **Load** button.

WARNING: *It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.*

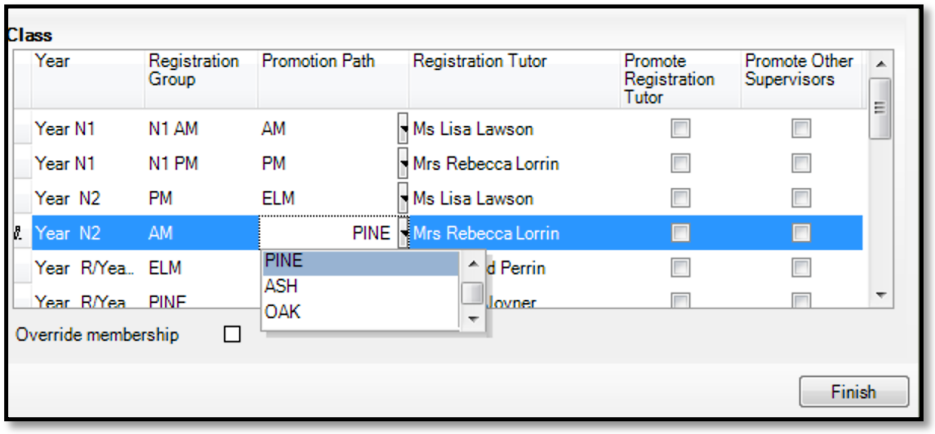
The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on.



Change the promotion path if required, by clicking the required year group in the **Promotion Path** column then selecting the required year from the drop-down list.

*NOTE: Schools that have a year group **N1** must ensure that this is mapped to **N2**.*

The **Class** panel will show the classes associated with each year group. These can be changed if required by clicking in the Promotion Path cell and selecting a different class.



To facilitate the identification of year group names, you can drag the dividing line of the column heading to increase the size of the **Year** column.

Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year.

Move down one class at a time by clicking in the **Registration Group** column then select the class to which the pupil will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.

The **Registration Tutor** column displays the name of the current class tutor. If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.

If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.

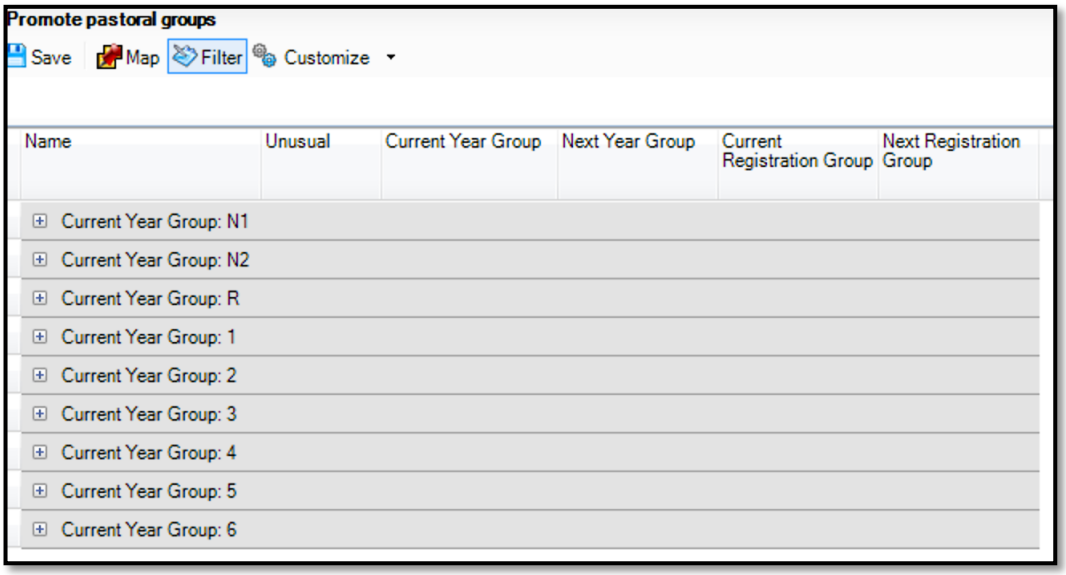
Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process. This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupils in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

IMPORTANT NOTE: *If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the Override Membership check box is not selected if you wish to retain your previous settings.*

Click the **Finish** button to save the settings.

Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

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

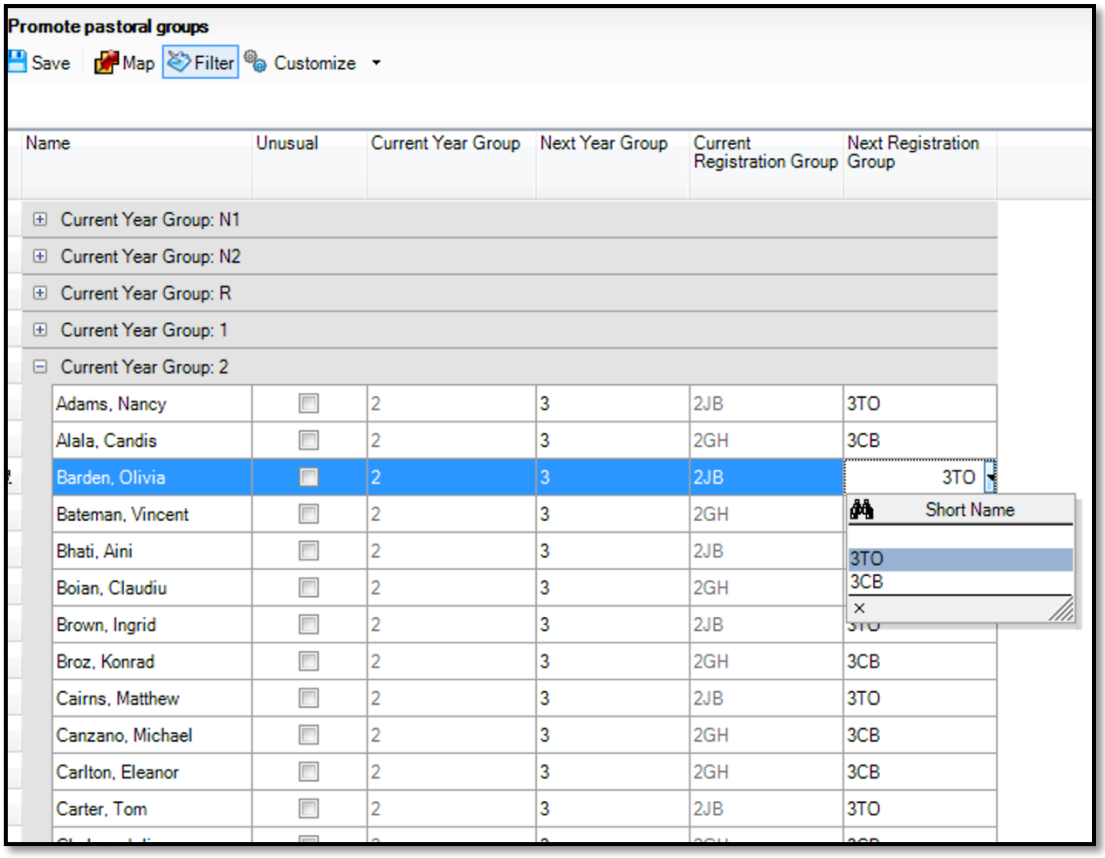


Set the Promotion Path for Individual Pupils

It is sometimes the case that a pupil is not to be promoted along with the rest of the class.

Click on the plus sign next to the current year group which you wish to view or set individual promotion paths, to view the promotion path for each pupil.

Once expanded, you can change the year or class for individual pupils by clicking in the appropriate column and selecting a different year or class from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog).



Repeat the process for any other pupils, if required.

Multiple pupil/students can be highlighted by holding down the **Ctrl** key then clicking each pupil you wish to select.

*NOTE: If the **Filter** button at the top left of the screen is deselected, all Year Groups and classes are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Class**.*

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

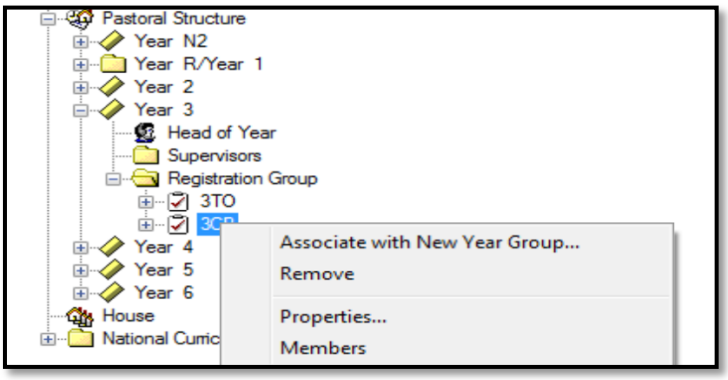
Check Registration Tutors

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

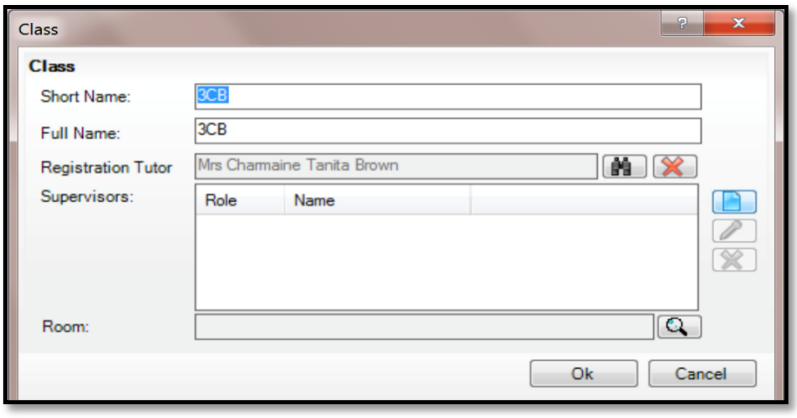
Select **Focus > School > Pastoral Structure > Next Academic Year Structure**.

Click the **+** icon adjacent to **Pastoral Structure** to reveal each registration group.

Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.



The **Class** screen will be displayed:



If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for then selecting the required person. Click the **OK** button.

If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** table. Select the **Role** of **Joint Main Supervisor** from the drop-down list then select the required person by clicking the **Browser** button then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection.

Click the **OK** button to return to the pastoral structure then click the **Save** button once you have assigned all the required registration tutors.

Change the Status of Applications

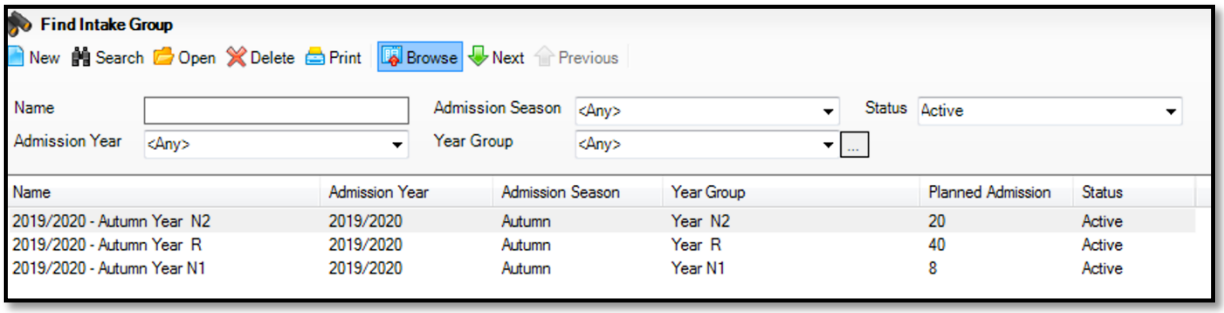
Applications can be added manually or imported via CTF. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining. It is possible however, to change an application status from **Applied** to **Accepted** or even straight to **Admitted**, if required.

If your offer of a place at your school is refused, you can change the status to **Withdrawn**. This means that although that pupil will not be included in any admission process or class lists, their details will be held in SIMS in case they subsequently arrive at your school.

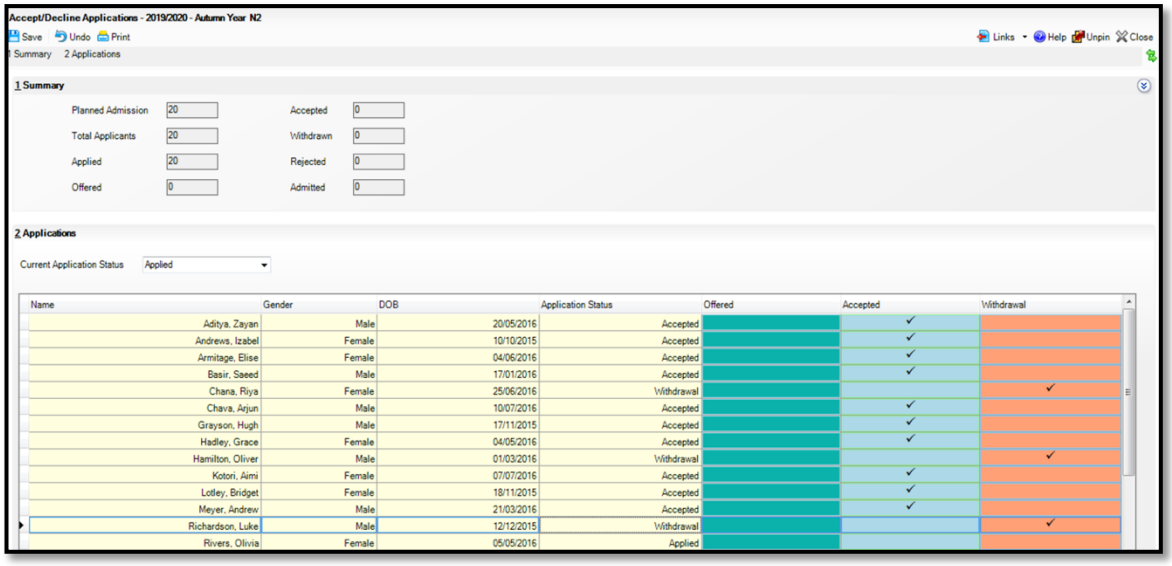
Accepting Applicants

This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

Select **Routines > Admission > Accept Applications** to display the **Find Intake Group** browser.



Search for then double-click the required intake group to display the **Accept/Decline Applications** page.



The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel displays by default, all applicants with an application status of **Offered**. This can be changed by clicking on the down arrow and selecting the appropriate option.

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

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

If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.

Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list will be empty.

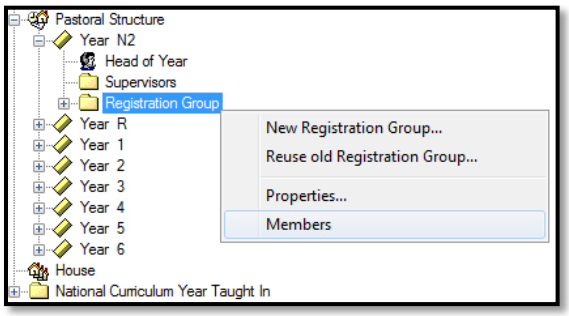
Allocate Applicants to Registration Groups/ Classes

Select **Focus > School > Pastoral Structure > Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

The **Effective Date** defaults to the start date of the next academic year. Changes to the structure can only be made with the default date showing.

However, the date can be changed if you wish to view pupils who will be joining the school at a later date (e.g., Nursery or Reception pupils due to start later than the rest of the school).

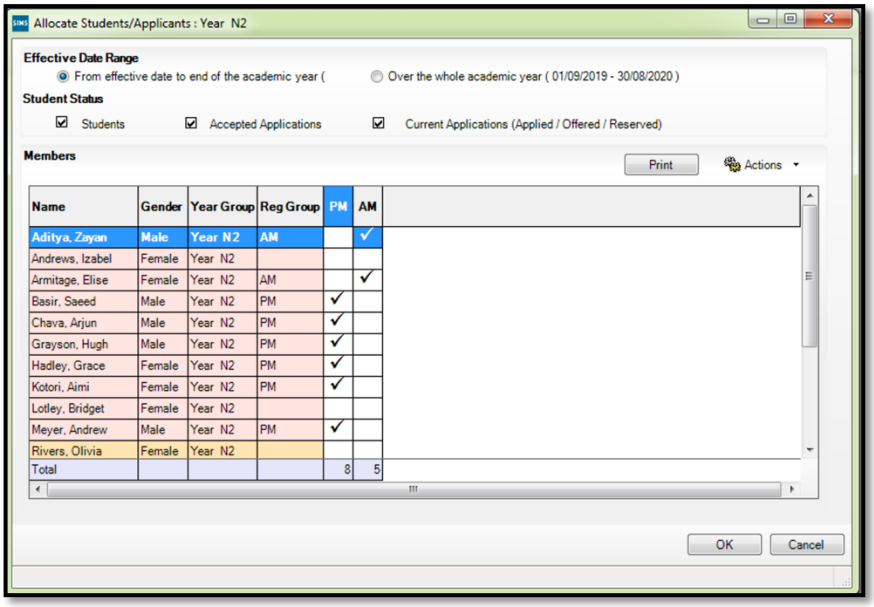
Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

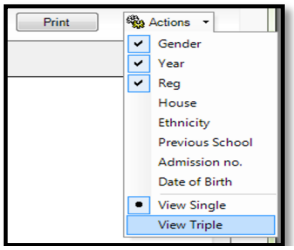
The **Name**, **Gender**, current **Year Group** and current **Reg Group** are displayed for each applicant together with the total number of applicants allocated to each class (at the bottom of the grid). Right-click any column heading to change the order.

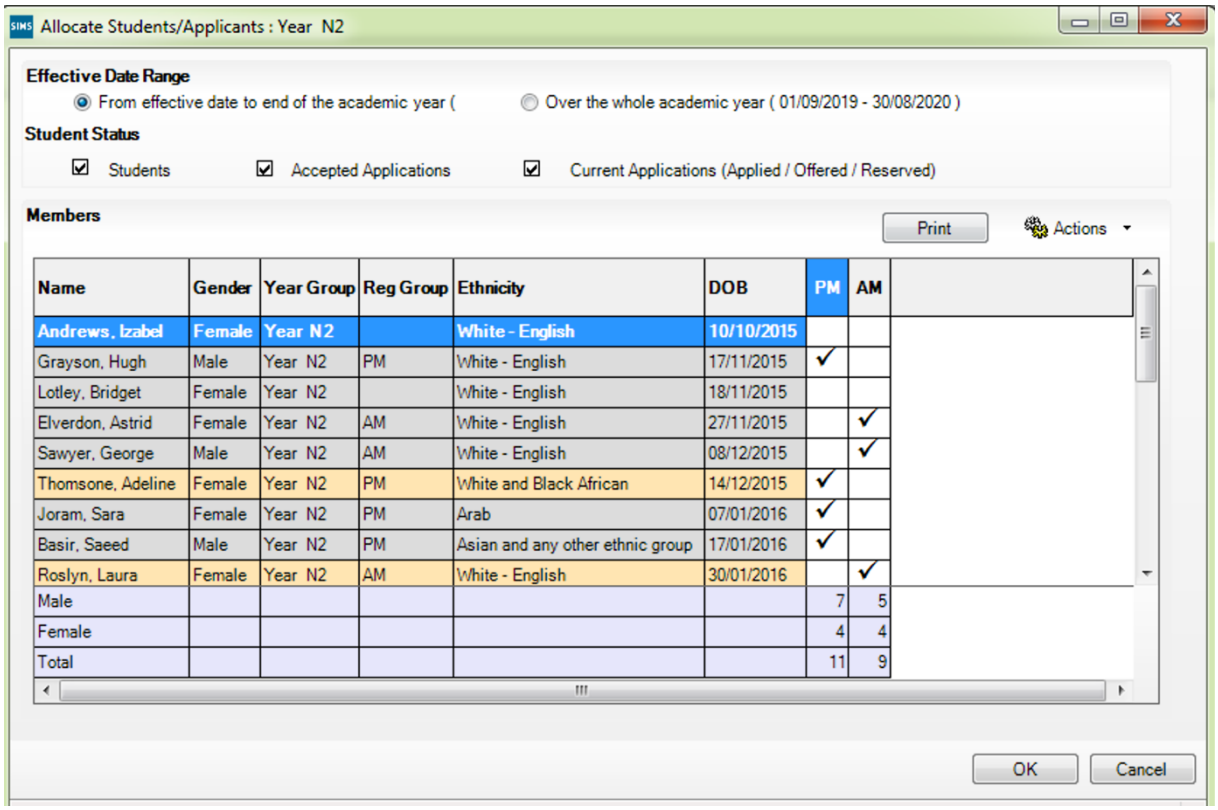
Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.



*NOTE: Although you can specify which class the applicants will go in, the applicants must be admitted (via **Routines > Admission > Admit Applications**) before they become a member of this class.*

Click on **Actions** to select additional columns or to change the view to **View Triple Totals (**which displays a breakdown of totals for females and males in each group).





Once you have selected classes for each applicant, click the **OK** button to save the changes.

Print Class Lists for the New Academic Year

Class (Registration Group) lists for the new year can be easily produced in advance using any of the following pre-defined reports:

Registration Groups (Dated)

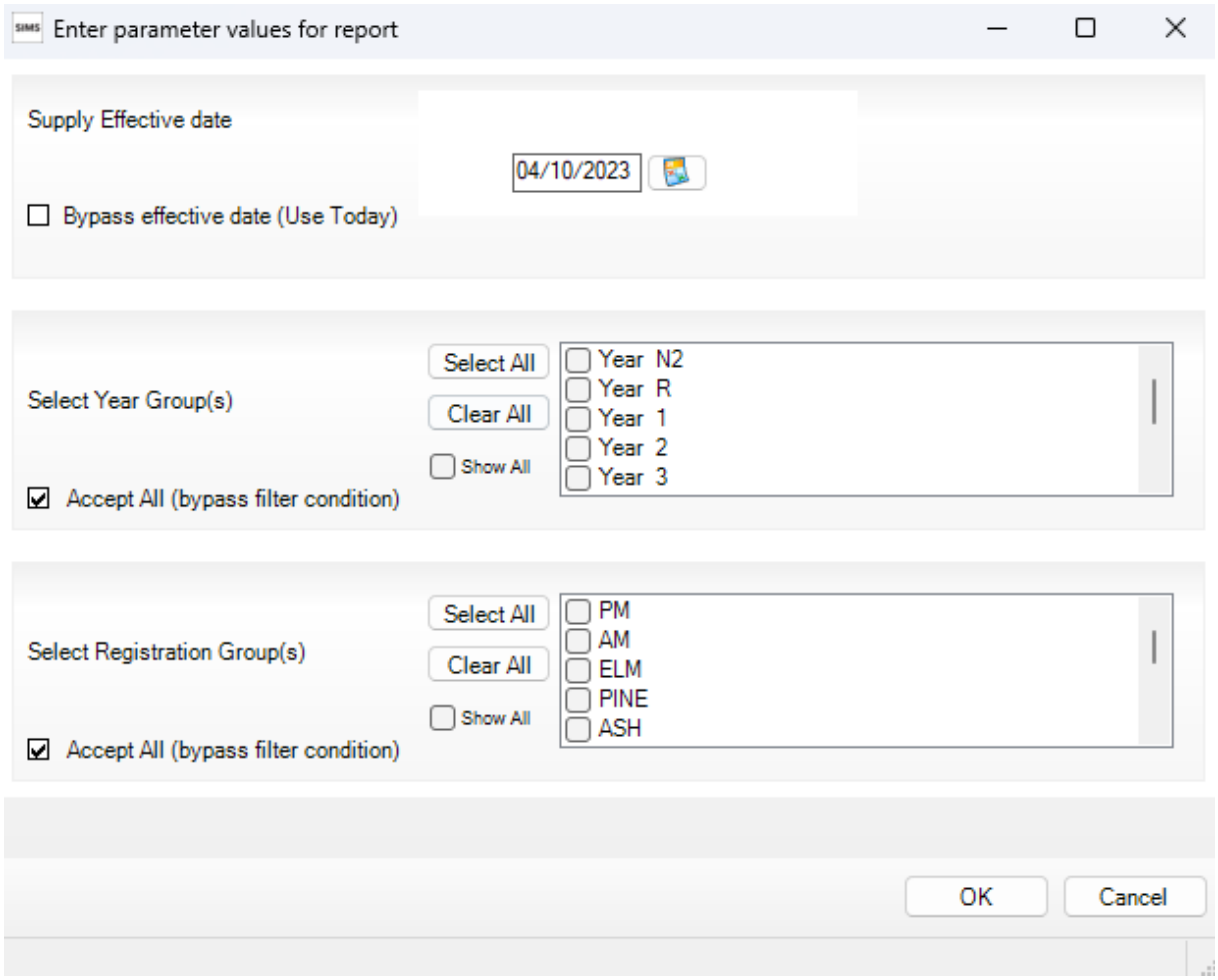
Registration Groups (Dated – DOB Sort)

Registration Groups (Dated – Gender Sort)

Registration Groups (Dated with Columns)

Select **Reports > Run Report** to display the **Report** browser.

Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.



Deselect the **Bypass effective date** check box.

Enter the required date, which should be a date **when all pupils will be attending**.

Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

Registration Groups (Dated) Report

Registration Groups (Dated)

Registration Groups (Dated)

Registration Group:
Tutor:
Room: **n/a**
Effective date: 03/09/2021

Name	Gender	Date of Birth
Abbas Latif	M	11-11-2016
Abbott Jessica	F	17-02-2014
Abhra Abjit	M	20-11-2009
Abhra Alisha	F	20-11-2009
Abhra Shaquib	M	17-12-2013
Abrams Paul	M	15-12-2014
Ackton Charlotte	F	10-02-2014
Ackton Stan	M	22-03-2010
Adams Nancy	F	18-12-2011
Adams Sadie	F	20-03-2013
Aditya Zayan	M	20-05-2016
Ainsley Charlotte	F	02-05-2015
Akeman Richard	M	02-02-2011
Akeman Steven	M	02-02-2011
Alala Candis	F	02-10-2011
Alala Michael	M	12-04-2014
Alamilla Sofia	F	02-12-2010

Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report but in Date of Birth order.

Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

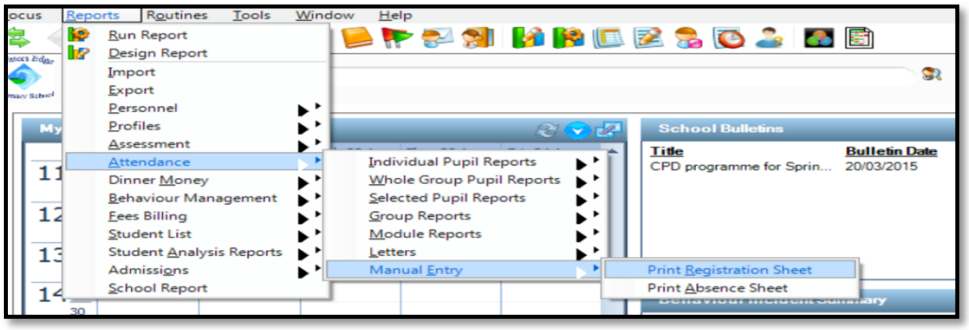
Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.

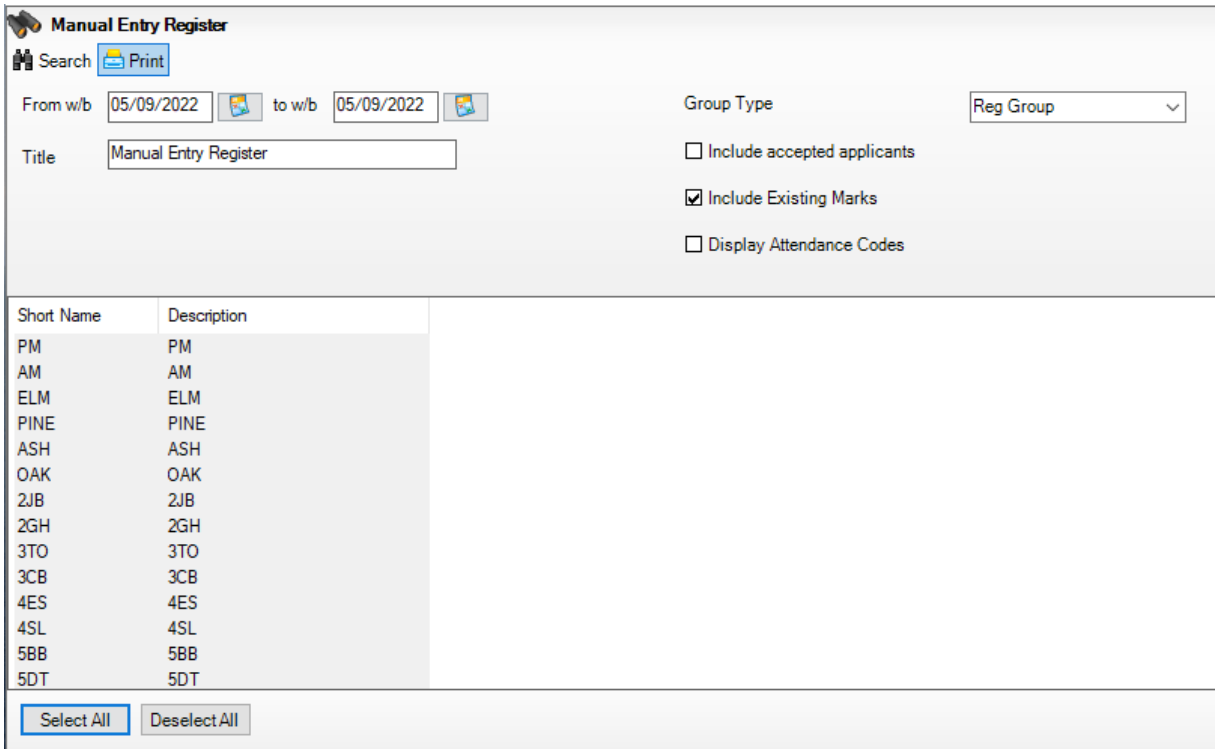
Print Registers for New Academic Year

Manual Attendance registers for the first week of term can be printed in advance if required.

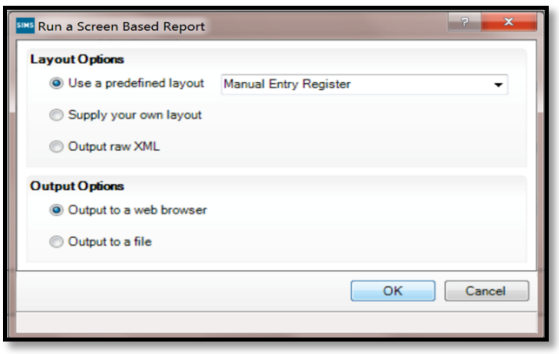
Go to **Reports> Attendance> Manual Entry> Print Registration Sheet**



Set the dates at the top of the screen to the **first week of the Autumn term** and tick the box to **Include accepted applicants**. In the lower part of the screen select the classes required or **Select All**.



The **Run a Screen based Report** screen will be displayed. Do not change any of the default settings and click on **OK**.



The selected registers will be displayed on screen and can be printed.

Deal with Unexplained Absences and Missing Marks

It is important to ensure that you clear any missing marks and unexplained absences on a regular basis. Attendance information is collected in each termly School Census.

Go to **Focus: Attendance: Deal with Missing Marks.** Set the date range and the Group Type to **Whole School**, click on **Search** and then double click on Whole School Selected. If you have any missing marks, the pupil names will be displayed with the dates and sessions of the missing marks. Enter the correct mark in the end column and **Save** your changes until the screen is empty.

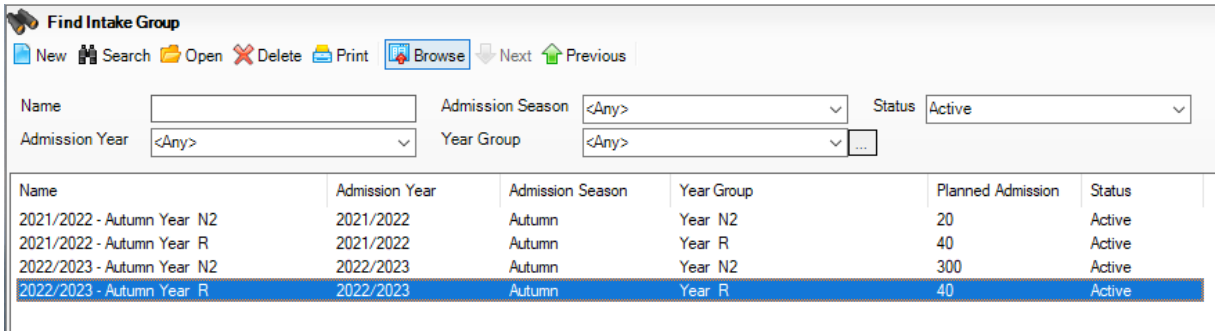
Go to **Focus: Attendance: Deal with Unexplained Absences.** Set the date range and the Group Type to **Whole School**, click on **Search** and then double click on Whole School Selected. If you have any unexplained absences (N code), the pupil names will be displayed with the dates of the N code. Enter the correct mark in the end column and **Save** your changes until the screen is empty.

At the Beginning of the Autumn Term

Admit Applicants

Applicants should be admitted on the first day that you expect them to attend at your school and not when they actually arrive at the school. If, however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

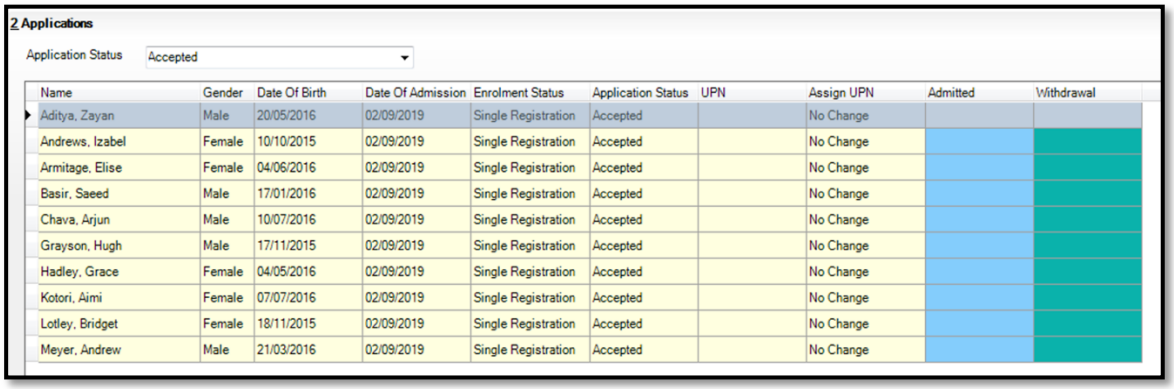
Select **Routines > Admission > Admit Applications** to display the **Find Intake Group** browser.



Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

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

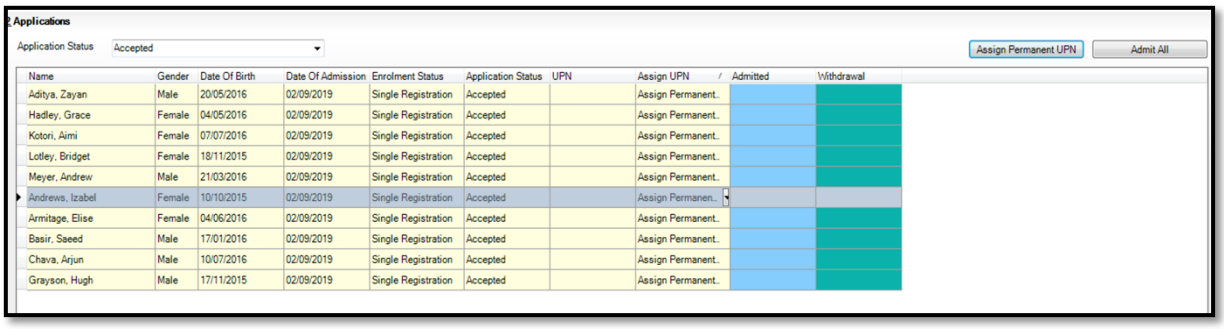
The **Applications** panel displays by default, all applicants with an application status of **Accepted**.



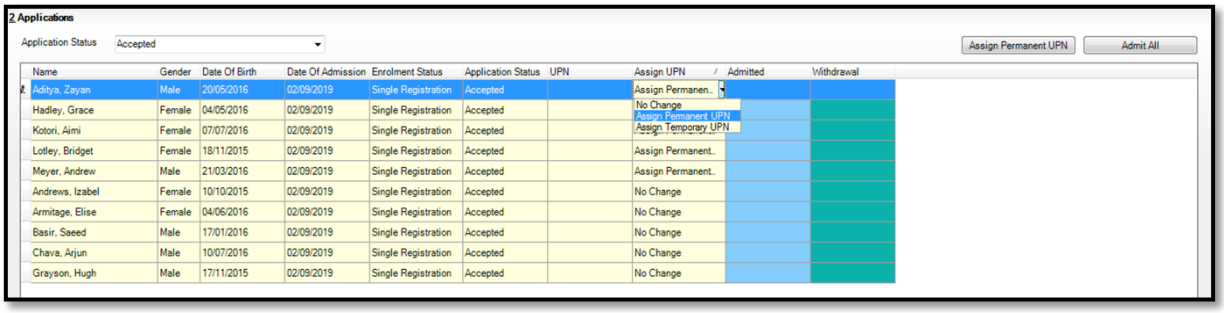
The display includes the **Name**, **Gender**, **Date of Birth,** proposed **Date of Admission**, **Enrolment Status**, **Application Status**, **UPN** and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.

If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list, then follow the remainder of this process.

If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN**, as shown in the following graphic.



To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**.



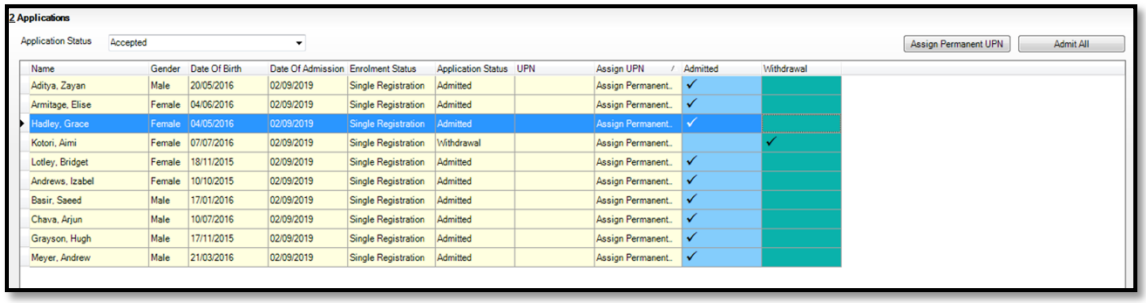
Note that Permanent UPNs should only be assigned to new applicants when it is believed that they have never previously been allocated a UPN. That is, if they have never attended a maintained school or Nursery in England or Wales.

Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant's information).

IMPORTANT NOTE: *UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you will need to allocate UPNs on an individual basis via the* ***Pupil Details*** *page.*

Any known existing UPNs can be entered in the ***Basic Details*** *panel by clicking the* ***Application*** *icon on the toolbar or by selecting* ***Focus > Admission > Applicant****.*

If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit.



Click in the Withdrawal column for any Applicant who will not be coming to your school.

Once complete, click the **Save** button to admit the applicants.

The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. If you have admitted all your applicants, the list will be empty.

Re-Admit Returning Pupils

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

IMPORTANT NOTE: *Do not remove the* ***Date of Leaving*** *as a method of re-admitting.*
It is perfectly acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the pupil leaves in July but returns in September).

Select **Focus > Pupil** (or **Student**) **> Pupil Details** to display the **Pupil Details** page. Click the **New** button to display the **Add Student** page.

Enter the pupil's surname into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** will be displayed.

Highlight the required pupil and click on the **Open** button to display a warning message **The selected student is a Leaver; do you want to re-admit the student?**

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

Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil's details.

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

Enter Patterns of Attendance for Part Time Pupils

The sessions when part-time pupils, (i.e. pupils of non-statutory school age) are not required to attend school can be specified using this routine. SIMS then applies the No Attendance Required code to the sessions that occur during the specified date range. The Week Range dates must lie within the new academic year.

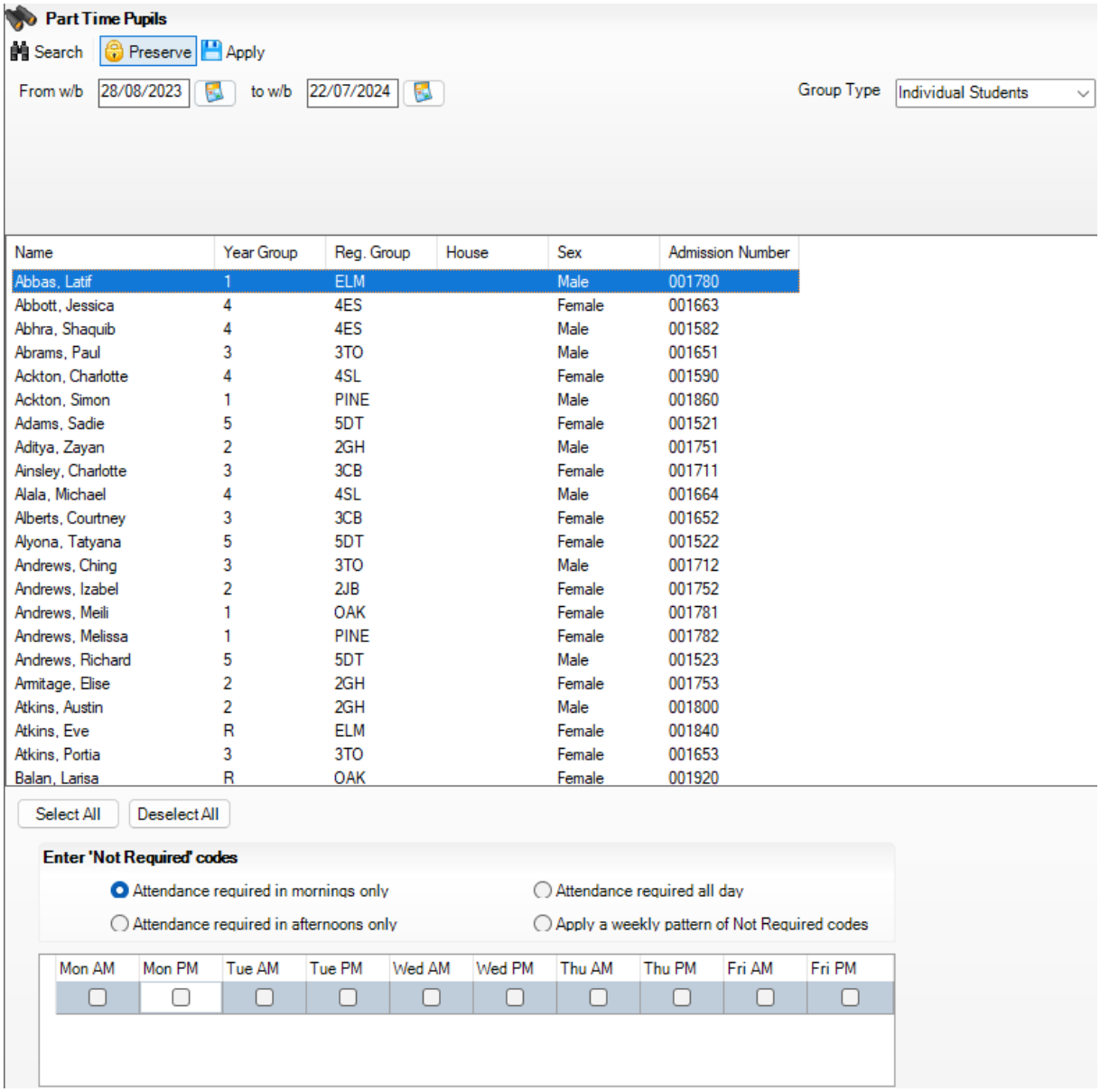
NOTE: The code ***X*** *is recorded as Non-Compulsory School Age Absence.*

To ensure that the required menu route is available, go to **Tools > Setups> Attendance Setup >** Module **Setup** and select the **Show Part-time Pupils** check box in the **Visibility Switches** panel. **Save** your changes and close the screen.

Go to **Tools > Setups > Attendance Setup > Part Time Pupils** to display the **Part Time Pupils** page.

Specify the date range appropriate to the period for which your chosen group will be part-time. The **dates must lie within the academic year.**

Note that the **Group Type** can be altered by clicking on the down arrow (for example to set a part time pattern for individual pupils rather than a whole reg group).



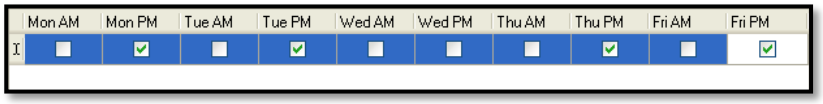
Highlight the required groups or pupils (using **Ctrl** and click to select multiple records). The **Select All** and **Deselect All** button can also be used if required.

Specify when attendance is required by selecting one of the radio buttons.

- Attendance required in mornings only
- Attendance required in afternoons only
- Attendance required all day - Select this option when a part-time pupil starts full-time school. All 'Not Required' codes for the pupil are removed from the system.

- Apply a weekly pattern of Not Required codes - Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupils are **not required** to attend school.

In the following example, the selected pupils are expected to attend Monday, Tuesday, Thursday and Friday mornings, and all day on Wednesday. It is important to note that the boxes that are checked refer to the sessions the pupil **is not required to attend.**



Click the **Apply** button to apply the codes to the selected part-time pupil/students.

Update Free School Meal Eligibility Information

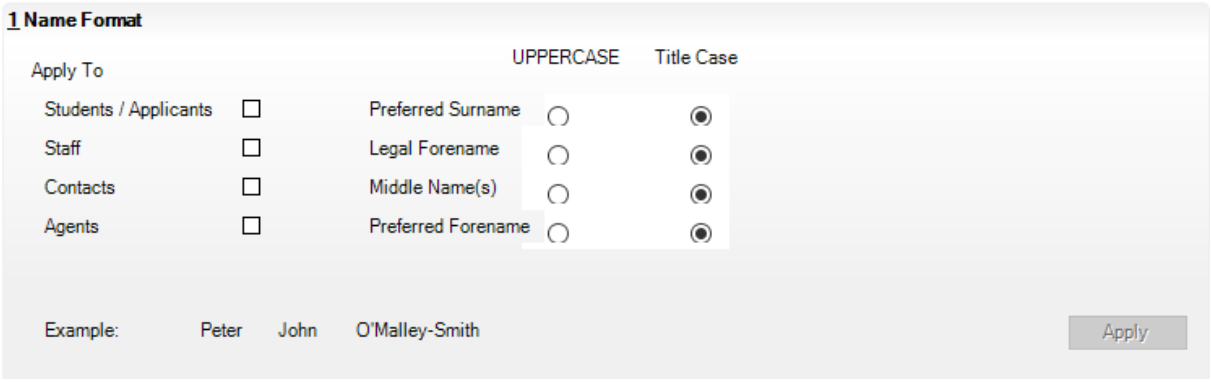
Go to the **Dietary Panel** of the Pupil Details screen and add any new start and end dates in the **Eligible for Free Meals** area – do not remove details of previous periods of eligibility.

Run Housekeeping Routines

Go to **Tools > Housekeeping > General**

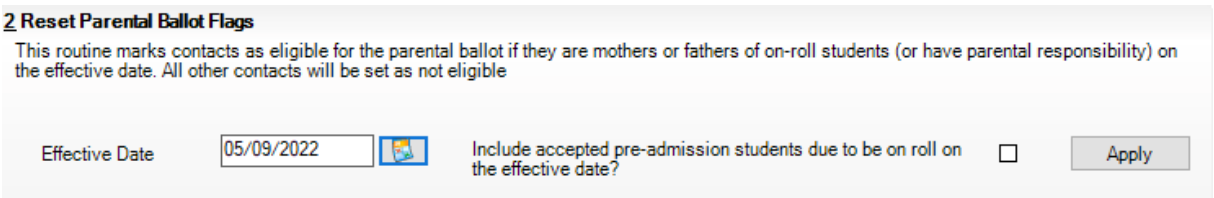
1. Name Format

This screen can be used to ensure that all the names in your SIMS system are in the same format.



When you have made your choice, click on **Apply**.

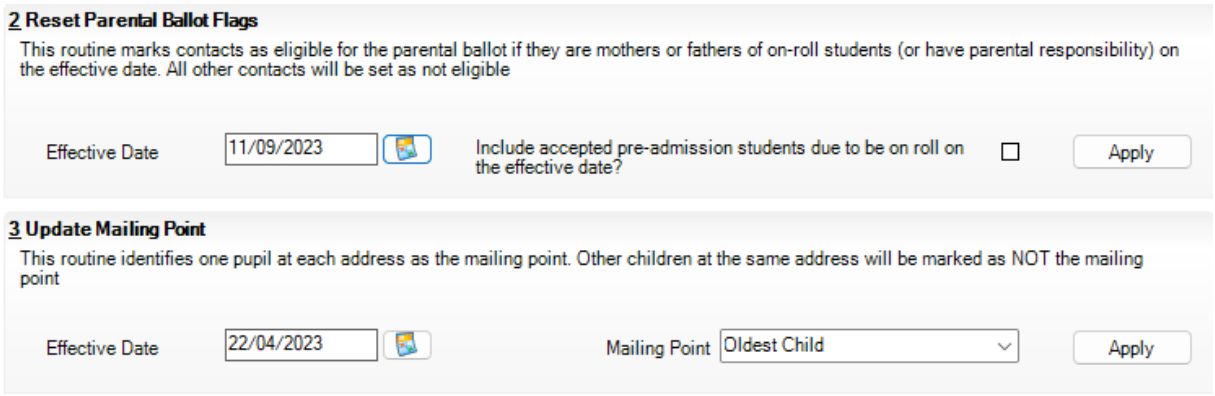
2. Reset Parental Ballot Flags



When you have made your choice, click on **Apply.**

3. Update Mailing Points

This screen is used to set the oldest or youngest sibling to act as a mailing point for the family, and thus make significant savings when sending communications home.



When you have made your choice, click on **Apply.**

Update Parental Salutation and Addressee

Go to **Routines > Pupil> Update Parental Salutation/ Addressee> Parental.**

This screen can be used to ensure that all pupils have the Salutation and Addressee fields completed. Where there are blanks it indicates that investigation is required on the pupil record, such as ensuring that the Parental Responsibility box has been checked, or that addresses have been correctly entered.

Check Exclude from Attendance – Schools with Nursery Year

Go to **Tools > Setups> Attendance Setup> Module Setup** and check panel 3 Exclude from Attendance. This menu route is used to exclude pupils not of statutory school age from Attendance reports. If the school has changed these dates in the past they will need to be amended in order to reflect the correct situation in the new academic year. This particularly refers to pupils moving from Nursery to Reception.

Collect changes to Pupil/ Contact information

As soon as possible after the start of the new year, and in accordance with your school's data quality processes, send out the Data Collection Sheets to parents, asking that the information is checked, and any changes reported back to school. Those changes can then be entered in SIMS.

Alternatively, the student data can be made available to parents for checking via the Parent App – please contact Osmis for further details.