End of Year 2023

04

Prepare for the New Year Pupils 2023/2024

For School Administrative Staff

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PICTURES DEPICTED MAY NOT NECESSARILY BE IN CORRILATION TO THE ACADEMIC YEAR YOU ARE CREATING. THEY ARE FOR INFORMATION ONLY

Creating an Admission Group

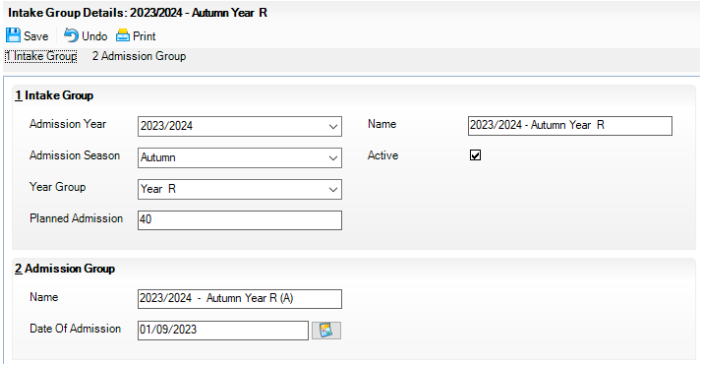
Before admitting new pupils, it is essential that Intake Groups and associated Admission Groups have been set up in your system. You may need more than one admission group and separate groups need to be created for each year into which you will receive new pupils.

New pupils joining your school should then be entered into the Admission Group by either CTF, ATF, or by manually entering them.

1. Follow route **Routines / Admission / Admission Groups / Setup**.

   Before you create a new Admission Group, use the SIMS browse functions to ensure that it has not already been created.

2. Click **New** at the top of the screen to create a new group.



You will see that the screen is split into two areas.

Intake Group Panel

The top panel is the **Intake Group** panel.

1. The **Admission Year** will pull through as the next academic year. It is possible for you to change this if required by clicking the dropdown arrow to the right of the box.

2. Enter the **Admission Season** applicable for the new group. Click on the dropdown arrow to make your selection.

Note: The **Admission Season** enables you to create more than one admission group to an Intake Group if required (e.g. staggered intake).

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3. Select the **Year Group** to which the admission group will apply.

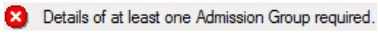
4. Enter the number of children you expect to admit to this intake group in the **Planned Admission** field.

Note: It is useful to overstate the number in the **Planned Admission** area. It can create problems later in the process if you have a smaller number indicated here.

The **Name** field is populated by the system when you click in the box.

The **Active** area is automatically populated when creating a new admission group. By taking the tick out of the box the group will then become de-activated and you will not be able to use it.

Admission Groups Panel

An Admission Group needs to be created before you can save your Intake Group. If you try and save before completing this area an error message will appear in the bottom left area of your screen. 

1. Click **New** to the right of the Admission Group panel

2. Enter a **Name** for the group and the **Date of Admission**.

   These can be amended at a later stage if required. The Date of Admission must be on or after the first day of the Academic Year.

3. Click **OK**.

4. Click **Save**.

Note: You can create multiple **Admission Groups** for an **Intake Group** to cope with staggered intakes.

Adding Applicant Details

You may add admission pupils by importing an ATF, CTF, manually adding the information or a combination of these.

This section will guide you through the manual entry process.

Note: We advise that before you enter a new applicant you check that they are not already in the system by using the SIMS browse functions.

You can search for admission pupils by Application Status, Intake or Admission group as well as the usual Surname and Forename.

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1. Follow route **Focus / Admission / Application**.

2. Click **New**.

3. Enter the applicant's **Surname**

4. Click **Continue.**

The system will search to check whether this may be a duplicate of an existing pupil and presents you with matched people if there are any.

Note: At the matched people screen ensure you **do not** select a person with the role of **Contact** or **Parent**.

If there are no matched applicants', it will take you straight into the **Application** screen.

1. Enter the information required.

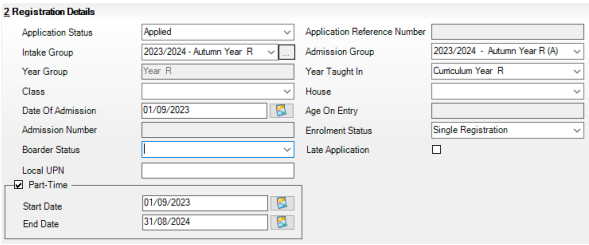
   The compulsory fields are **Legal Forename, Date of Birth** and **Gender**.

   If you are the first school a pupil is attending, you will need to issue a UPN.

   Once you have entered the basic details click the **Registration** hyperlink to take you to the appropriate section.

Note: You will not be able to save the record until information has been entered into the Registration section.

   Compulsory fields are **Intake Group**, **Date of Admission**, **Admission Group** and **Year Taught in**.



   Enrolment Status defaults to **Single Registration** but can be changed manually.

2. Enter the **Year Taught In**.

   Any other information can be entered as required, including manually amending the date of admission and the class (registration group). **If you have different class names next year you will not be able to allocate the class at this stage.**

3. Click **Save**.

   Other information relating to ethnicity, UPNs etc will be populated from importing a CTF if the pupil is coming from a previous school. If you are the first school a pupil is attending, you will need to collect this information and complete the appropriate area of the record. Complete all address and contact information in the usual way.

Part-Time Applicants

If the applicant will be attending school on a part time basis then you will need to put a tick in the **Part-Time** box. This can be found at the bottom of the **Registration** panel.

1. Tick the **Part-Time** check box to activate the **Start Date** and **End Date** fields.

2. Enter the appropriate dates.

Note: Part-time attendance is usually only applicable to nursery school children but is permitted for all ages and is considered as anything less than 10 sessions per week. It refers to part time education and NOT part-time in one or more establishments which is known as Dual Registration. Part-time arrangements outside of Nursery will be subject to LA agreement.

Importing Pupil Data via Common Transfer File

It is statutory for all schools to transfer pupil information electronically. This is done by producing a Common Transfer File (CTF) and sending it to another school using the DfE Secure Pupil Transfer site. This site is available through the DfE website.

You can use CTFs to transfer information as often as you like – it will not duplicate information but will update what is already there. The DfE envisage that primary schools will send information to secondary schools in both January and July.

Check your CTF Set up

1. Follow route **Tools / Setups / CTF**.

2. Select which areas of data to import and export by default.

   Directories can be anywhere on your shared drive e.g.

   CTF Import Directory:
   Z:\SIMS\STAR\CTFIn (or CTFOut) (or C:\ wherever your SIMS system is installed).

   <u>Or</u>:

   CTF Import Directory:
   Y:\ MIS \ CTFIn (or CTFOut).

Importing a CTF

1. Follow route **Routines / Data In / CTF / Import CTF**.

2. Make the appropriate selection for the CTF to be imported, i.e. General (used to import all details) or Add Data for Existing Pupils Only (used if the child has already been entered into SIMS and the data is just to be updated.

3. Click **Select**.

4. Say **No** at the **Matching Scale** box.

5. Select the information you wish to import from the CTF at the top of the screen. If data already exists in SIMS it may be overwritten when it isn't required, i.e. Student Address and Contacts.

6. Choose the CTF file to import

7. Choose and highlight which pre-admission group you wish to place the pupils in.

8. Click **Import CTF**.

The number of total pupils in the CTF file, the number of pupils processed and those which are new pupils are shown in these boxes.

Any exceptions that occur during the import are displayed in the Exception Log.

Changing the Status of Admission Pupils

Any admission pupils that are imported via CTF will automatically be given an application status of **Offered**. Those imported via ATF will be issued a status of **Accepted**.

Any admission pupil entered manually has a default **Application Status** of **Applied**. This can be changed at the point of data entry.

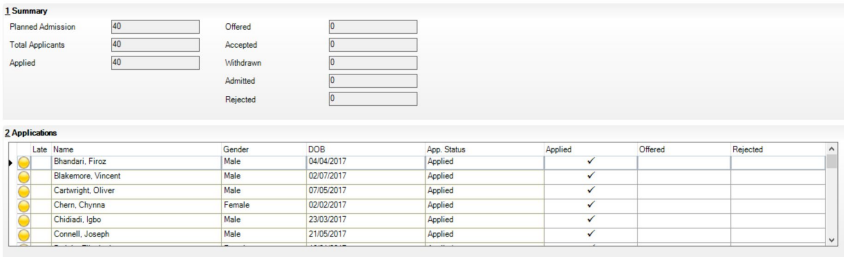
An individual admission pupil's **Application Status** can be changed in their applicant record.

Finalising Offers

1. Follow route **Routines / Admission / Finalise Offers**.

2. Select your intake group by using the browse facility in the usual way.

At the top of the screen is a summary of your Admission group and the section below will list all those pupils that have been assigned to it.



On the list of Pupils, you will see their status is depicted with a tick in the **Applied** box.

3. Change the status by ticking the appropriate box (unfortunately you cannot select more than one at a time.

4. Click **Save**.

You will need to repeat this process for all the admission groups you have set up.

Accept Applications

Once your admission pupils have an **Application Status** of **Offered,** the next stage of the admissions process is a status of **Accepted** where appropriate.

Note: Pupils must have an application status of **Accepted** before they can be admitted in September.

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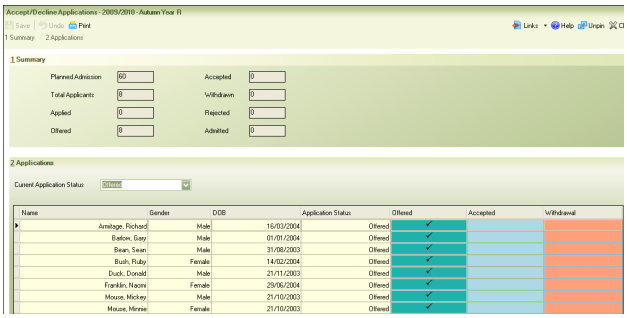
1. Follow route **Routines / Admission / Accept Applications.**

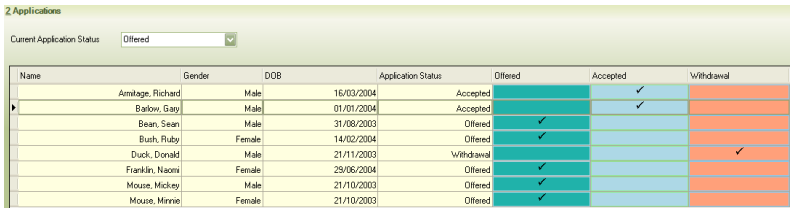
2. Select your intake group by using the browse facility in the usual way.

At the top of the screen is a summary of your Admission group and the section below will list all those pupils that have been assigned to it.



On the list of Pupils, you will see their status is depicted with a tick in the **Offered** box.

3. Change the status by ticking the appropriate box (unfortunately you cannot select more than one at a time.



It is also possible to indicate at this stage whether an applicant has **Withdrawn** their application.

4. Click **Save**.

You will need to repeat this process for all the admission groups you have set up.

Changing the Status of an Individual Application

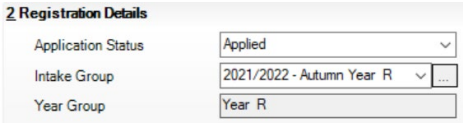
It is possible to change the status of an individual applicant in the Application focus.

1. Follow route **Focus / Admission / Application**.

2. Search and select the required **Applicant** using the SIMS browser panel.

Note: Only applicants with a current **Application Status** will be displayed by default. i.e. those without **Withdrawn, Rejected** or **Admitted**.

The current status of the application is displayed under **Registration Details**.



3. Select the appropriate status by clicking the drop-down arrow to the right of the box.

4. Click **Save**.

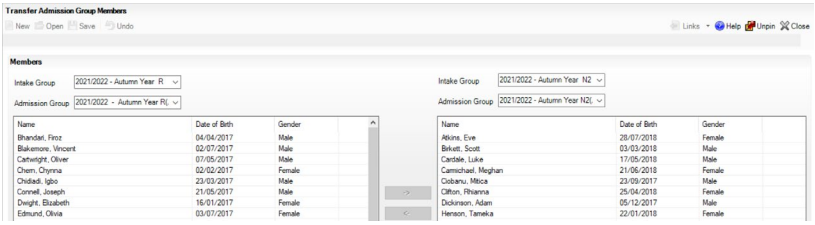
Note: It is possible to select any **Application Status** and a status can be skipped if required. There is no need for the statuses to be selected and then saved in order.

This procedure can also be followed for changing an individual's **Intake Group** or **Admission Group**.

Transferring Applicants to a Different Group

During the admission process, you may need to transfer applicants from one intake group to another, e.g. if the applicant has been recorded in the wrong admission group, or you are changing to a staggered intake.

1. Follow route **Routines / Admission / Admission Groups / Transfer Applicants**.



The screen is split into two areas. The left-hand side is where you select the intake group to transfer from and the right-hand side is where you select the intake group to transfer to.

By default, the page displays the first available intake group together with any applicants that have been assigned to the group.

2. Select the **Intake Group** and **Admission Group** on the left-hand side of the screen, from which you wish to move the applicants from.

   A list of pupils will then appear in the box below.

3. Select the **Intake Group** and **Admission Group** on the right-hand side, selecting where you wish to move the applicants to.

4. Select the applicants to be transferred on the left-hand side using the **Ctrl** or **Shift** keys if appropriate.

5. Click the **Forward** button to transfer the selected applicants.

   If any are transferred in error, click the **Backward** button .

6. Click **Save**.

Allocating Admission Pupils to Classes

There are two ways to allocate **pre-admission pupils** to classes, either:

- Individually through the **Pre-Admission Pupil Details** page (if class names are staying the same as next year), or;
- In bulk using the following instructions:

1. Follow route **Focus / School / Pastoral Structure / Next Academic Year Structure.**

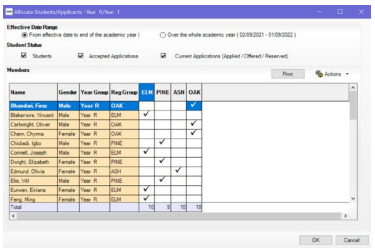
2. The Effective Date defaults to the start date of the next academic year. Change this to the proposed Date of Admission for your **Accepted Pre-Admission pupils**.

3. Click **Go**.

4. Expand the Pastoral Structure by click on the **+**.

5. Right-click the required **Registration Group** folder and select Members from the pop-up menu to open the **Allocate Pupils/Applicants** dialog.

6. Click in the cell for the required **Registration Group** to place a tick in the box.



- The pupil's **Name**, **Gender**, current **Year Group** and **Registration Group** will be displayed together with the total number of pupils allocated to each class at the bottom of the grid. Right-click on any column heading to change the order. Clicking an individual class heading can be useful to identify whether there are any blanks.

- Additional columns can be displayed by clicking the **Actions** button and selecting an item from the drop-down menu such as House, Ethnicity, Previous School, etc.

Leavers

Individual Leavers

There are numerous different ways of marking pupils as leavers. The first is via the **School History** panel of the **Pupil Details** screen. This method tends to be used for one-off leavers through the school year.

During the Summer Term of an academic year it is more appropriate to use the 'batch' facilities for removing groups of individual pupils - or whole year groups.

Removing a whole year group

1. Follow route **Routines / Pupil / Leavers**.

2. Browse for the **Year Group** to leave and click **Search**.

3. Click **Select**.

4. Choose the **All** option to add the pupils to the **Pupils** panel below.

If you do not wish to make all of the pupils leave, then you can select the appropriate ones in the browse and then choose the option **Select / Selected**.

5. You will now see your chosen leavers in the bottom part of the screen, known as the **Leaving Information** panel.

6. Enter the **Date of Leaving**.

7. Select the **Reason for Leaving**.

8. Enter the **Destination after Leaving**.

9. If the details selected apply to a selection of pupils highlight the required pupils using the **Ctrl** key and single-clicking.

10. Click the **Assign to Selected** button or **Assign to All** button as appropriate.

11. Repeat this process for the various destination options that are applicable to all leavers.

12. If you make an incorrect entry for a pupil, highlight the pupil and click the **Clear** button to remove the information and enter the correct information.

13. Click **Save**.

14. Click **Yes** to update.

Note: This may take a while to update as other modules are also updated.

Editing leavers details

If a pupil changes their Destination school after you have followed the above routine, change the details on the **Pupil Details / School History** panel.

Exporting Pupil Data

It is a statutory requirement that you create a CTF for all pupils who are leaving your school and they should be created for the school to which they are going.

You will need to check your CTF Setup as detailed on Page 7.

Exporting a CTF

1. Follow route **Routines / Data Out / CTF / Export CTF.**

2. Select **General** and click **Select**.

   The list of pupils can be sorted by clicking on the headings.

3. If exporting a whole year or registration group filter on the applicable Group using the dropdown list.

4. If you have previously exported information for pupils' then you will need to click the **Include Pupils Already Exported** box and then click the **Refresh Pupils** button.

All current pupils are displayed by default.

- Select the **Destination School** from the appropriate drop-down list. This can be done on a pupil by pupil basis, or you can select multiple pupils using the **Ctrl** or **Shift** keys accordingly.
- To select all the pupils, right-click anywhere in the table and choose **Select All** from the pop-up menu.

5. Select the **Destination School** by clicking in the appropriate column and selecting from the drop-down list.

Note: You can use this area to create all of your CTFs at one time for the different schools / areas that your pupils are moving on to.

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6. If the School you wish to choose is not available in your dropdown list, go to **Links** and choose **Schools**. Add or update the school information and on saving it will be available in the drop down. You will need to close and re-open the **Export CTF** screen if it was open when adding the new school.

7. Once you have completed allocating schools to pupils, click **Export CTF**.

8. Make a note of the filename(s) that appears once your CTF has been created.

9. Create a CTF for pupils leaving other year groups also.

Note: There is no need to create a CTF for those pupils leaving Education.

Printing Class Lists for Next Year

1. Follow route **Reports / Run Report**.

2. Expand the **Pupil Focus** and double-click the pre-defined report entitled **Registration Groups (dated with columns)**.

3. Select the required Start Date using a date on or after the proposed dae of admission to include any new students.

Note: If your classes for the next academic year do not pull through you will need to go back and tick the **Show All** box in the **Registration Groups** area of the **Apply Filter** option.

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4. Click **Ok**.

Reports for Diocesan Returns

If you are required to print any reports in order to complete Diocesan returns, for example printing a report for your leavers and their religions, then we advise that you print them out before the end of this school term.