

Key Stage Data Collection Guidance Notes - SIMS

May 2025

Management Information

Kent
County
Council
kent.gov.uk



This information notice explains how to enter your statutory key stage data outcomes into SIMS.

You need the Spring 2025 SIMS upgrade for these returns - to check this, in SIMS.net go to **Help | About SIMS.net** option from the menu. The version should be 7.222 or later.

Before you use the new 2025 wizards, you should consider whether you need to set up a User Defined Group. This is used when you have pupils at the end of each key stage who are not marked as being in the correct NC Year in SIMS.net.

You will also need to set up a group to:

- Include any pupils who joined another school after the eligible period **AND/OR**
- Exclude any pupils who have joined your school after the eligible period.

The eligible periods for each key stage are:

EY FSP

- If a child starts a new school or provider on the first day of the second half of the summer term (or any time after that), then the previous school should submit the data to the LA.
- If a child moves school or provider any time before the half term, then the new school should submit the data.
- If half term dates differ between schools and LAs, it is the school or provider where a child attends (or will attend) for the longest period of time that submits the data

Phonics – if a pupil changes school:

- before the check period – the receiving school should assess the pupil and submit data for them
- during the check period – the receiving school should find out whether the pupil has already taken the check (if not, they should assess the pupil and submit data for them)
- after taking the check – their result should be submitted by the school where they took the check and provided to the new school

KS2

- If a pupil changes school before test week, the receiving school must submit TA data for them.
- If a pupil changes school during test week, the school where the pupil was registered at the beginning of test week must submit TA data for them.
- If a pupil changes school after test week, the school where the pupil was registered during test week must submit TA data for them.

The following example of how to create a user defined group uses EY FSP 2019 as an example.

Go to **Focus | Groups | User Defined Groups** and the following screen will appear.

The screenshot shows the 'Maintain User Defined Groups' window. At the top, there's a menu bar with 'Focus', 'Reports', 'Routines', 'Tools', 'Window', and 'Help'. Below the menu is a toolbar with icons for 'Back', 'Forward', and various group management functions. The main area has a title bar 'Maintain User Defined Groups' and a toolbar with 'New', 'Search', 'Open', 'Delete', 'Print', 'Browse' (highlighted with a red box), 'Next', and 'Previous'. Below the toolbar are three input fields: 'Group Description', 'Short Name', and 'Active State' (a dropdown menu showing '<Any>').

Click on the **New** button and the screen shown below will appear.

The screenshot shows the 'User Group Details' window. It has a title bar 'User Group Details' and a toolbar with 'Save', 'Undo', and 'Print'. Below the toolbar are two tabs: '1 Group Details' and '2 Membership'. The '1 Group Details' tab is active and contains fields for 'Group Description' (with value 'EYFSP 2019'), 'Short Name' (with value 'FSP19'), 'Active State' (a dropdown menu showing 'Active'), 'Current Main Supervisor' (with a search icon), and 'Notes' (with value 'Year R pupils including 1 leaver'). There is also an 'Include in Discover' checkbox. The '2 Membership' tab contains fields for 'Effective Date Range' (with value '15 Apr 2019 - 31 Aug 2019'), 'Academic Year' (a dropdown menu showing 'Academic Year 2018/2019'), 'Cursor Day' (with value '<None>'), 'Cursor Date' (with value '<None>'), 'Selected Member', and 'Selected Membership'. At the bottom, there is a 'Zoom' checkbox and an 'Action...' button (highlighted with a red box). Below the 'Action...' button is a calendar view showing months from Sep to Aug.

Annotations on the right side of the screen:

- Add a relevant **Group Description** and **Short Name**.
- Make sure the Active State Is **Active**.
- If you wish, add a brief note.
- Then click on the **Action** button and click **Add Member**.
- The screen shown below will appear.

The screenshot shows the 'Select Members' window. It has a title bar 'Select Members' and a toolbar with 'Search', 'Links', and 'Help'. Below the toolbar are fields for 'Surname', 'Forename', 'Role' (a dropdown menu showing 'Student'), 'Group Type' (a dropdown menu showing 'National Curriculum Ye' and highlighted with a red box), 'Group', 'Effective Date' (with value '15/04/2019'), and a table with columns 'Name', 'Gender', 'Year and Reg Group', and 'Current Group'.

Change the **Group Type** filter to National Curriculum Year, then click **Search**. All the pupils in your school will now be displayed.

To ensure that all pupils in each year group are shown together, click on the **Current Group** header. This will sort the pupils by Year Group as shown overleaf.

Name	Gender	Year and Reg Group	Current Group
Harris, Rhys	Male	RASH	Curriculum Year R
Daniels, James	Male	RASH	Curriculum Year R
Hollows, Jake	Male	RELM	Curriculum Year R
White, Theo	Male	RELM	Curriculum Year R
Kaur, Amir	Male	RELM	Curriculum Year R
Roberts, Matthew	Male	RELM	Curriculum Year R
Wilson, Emily	Female	RELM	Curriculum Year R
Benson, Chantal	Female	RELM	Curriculum Year R
Bordet, Magda	Female	RELM	Curriculum Year R
Ludovak, Marika	Female	ROAK	Curriculum Year R
Lanes, Nia	Female	RELM	Curriculum Year R
Cleeves, Rosie	Female	RELM	Curriculum Year R
Simones, Madeline	Female	ROAK	Curriculum Year R
Nowak, Roza	Female	ROAK	Curriculum Year R
Kaur, Safia	Female	ROAK	Curriculum Year R

Select all the relevant FSP pupils by clicking on them while holding down the Shift key.

You can also select any pupils who are not listed as NC Year R but whom you need to return results for.

Remember to exclude any pupils you should not be returning results for (see page 1).

When all pupils are selected click the **OK** button.

You will be returned to the Membership screen as shown below which has now been populated with the selected pupils.

2 Membership

Effective Date Range: 15 Apr 2019 - 31 Aug 2019 Academic Year: Academic Year 2018/2019

Cursor Day: <None> Selected Member: Benson, Chantal - RELM

Cursor Date: <None> Selected Membership: <None>

Zoom Action...

Member	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Benson, Chantal - RELM												
Bordet, Magda - RELM												
Cleeves, Rosie - RELM												
Daniels, James - RASH												

If you need to add a pupil to the group who has left but you need to return results for them (see page 1), click the **Action | Add Member** button again. You will be returned to the Select Members screen as shown overleaf.

Select Members

Search

Surname: Forename: Role: Group Type: Group: Effective Date:

Name	Gender	Year and Reg Group
Yoshida, Yusuke	Male	(6VC)
Zinkin, Harold	Male	(6VC)
JARMAN, BOB	Male	(RELM)
Andrews, Richard	Male	1ASH
Bartram, Piers	Male	1ASH
Cummins, Jake	Male	1ASH
Denton, Emma	Female	1ASH
Elliott, Josef	Male	1ASH
Flemming, Amber	Female	1ASH
Haddon, Magdalene	Female	1ASH
Lok, Daquan	Male	1ASH
Nelson, Matthew	Male	1ASH
Ritika, Mira	Female	1ASH
Ross, Heston	Male	1ASH
Sachi, Lian	Female	1ASH

OK Cancel

Change the Group Type filter to **All**, then click **Search**.

Find the relevant pupil/s on the list – click to highlight, then click on **OK** when finished.

You'll be returned to the Membership screen where all chosen pupils will be displayed.

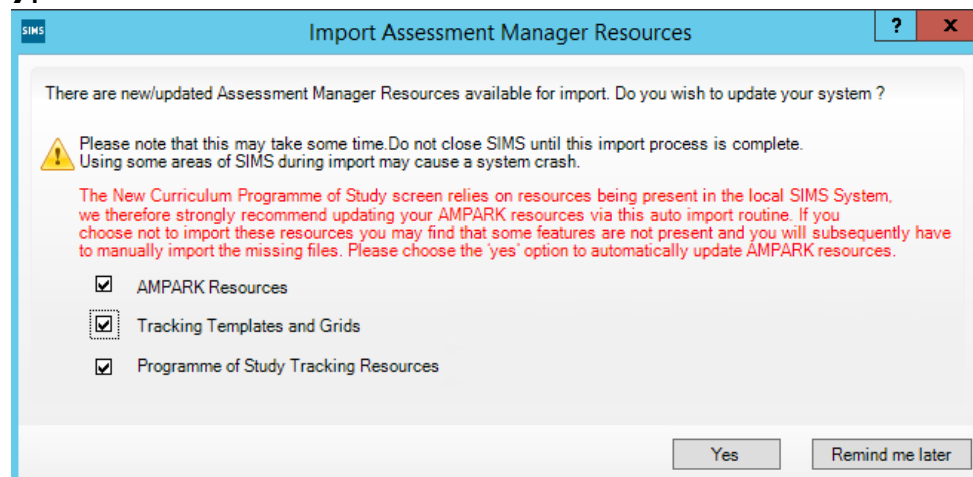
Finally, click on the **Save** button near the top of the screen and **Close** the window.

Importing the 2025 Wizards (AMPA folder)

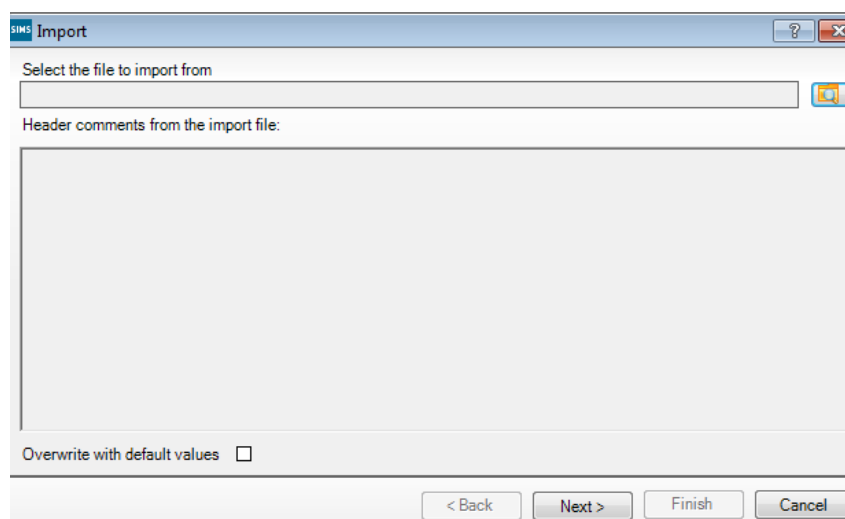
NOTE – all examples use 2019 screenshots

Go to **Routines | Data In | Assessment | Import**

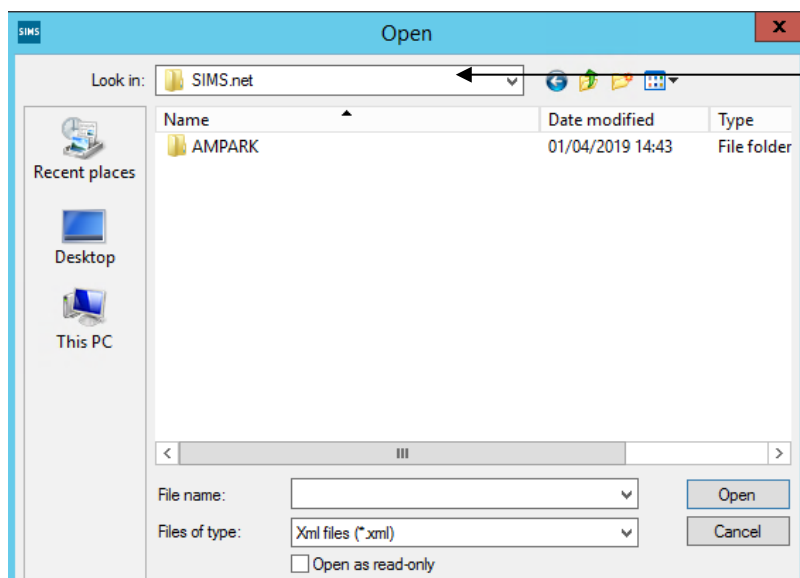
If the following panel appears, make sure all the boxes are ticked and click **Yes**. All resources (including the Wizards) will be imported. **This can take a few minutes to complete.** During the import, a progress bar is displayed - when the resources have been imported and the activity log appears, you can continue these guidance notes from **Running the Key Stage Wizards** on **page 7**.



If this panel **does not** appear or the Wizards do **not** import, continue with the screen shot immediately below.



Click on the magnifying glass and the screen shown overleaf will appear.



The system should default to your **SIMS.net** folder as shown.

If it does not, you will need to navigate to it by clicking on the arrow by the Look in box.

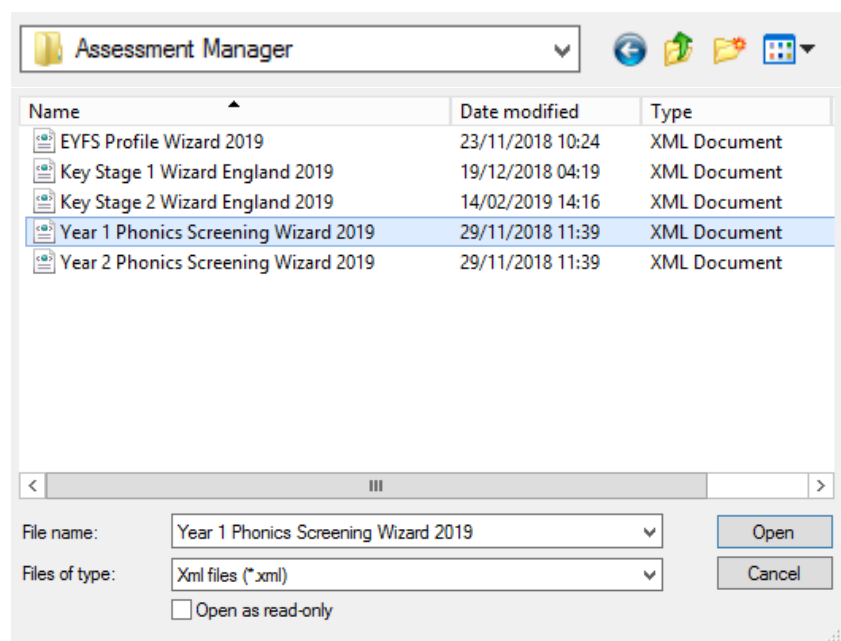
It is normally located at
C:\Program
Files(x86)\SIMS\SIMS.net

For SIMS Connected schools (hosted by ESS) this should be on your S drive

Within your SIMS.net folder there should be an **AMPARK or AMPA** folder as shown above. Double click on this folder, then on the following folders in succession:

- **England Primary (and Middle Deemed Primary)**
- **Assessment Manager**

Once the Assessment Manager folder is open, all related Wizards will be displayed as shown below.



Import **each** Wizard in turn. Click on the Wizard you wish to import and click on the **Open** button.

For 2025 the Wizards you need to import are:

- EYFS Revised Profile Wizard 2025 (Select All on next screen)
- Year 1 Phonics Screening Wizard 2025
- Year 2 Phonics Screening Wizard 2025
- Key Stage 2 Wizard England 2025

The import screen will be shown. Make sure the **"Overwrite with default values"** box is ticked and then click **Finish** followed by **Yes** to start the import. This may take some time depending on the speed of your PC. An Activity Log will be displayed when the import is complete. Make sure the Log states that all items were successfully imported. Click on the **Close** button.

Running the Key Stage Wizards

Go to **Tools | Performance | Assessment | Wizard Manager** and the following screen will appear.

Name	Edit Date	Complete
EYFS Profile Wizard 2019	01/09/2018	☐
Key Stage 1 Wizard England 2019	01/09/2018	☐
Year 1 Phonics Screening Wizard 2019	01/09/2018	☐
Year 2 Phonics Screening Wizard 2019	01/09/2018	☐

A list of **all** the Wizards on your system will be displayed.

Make sure the filter says **Incomplete**. If you can't see the Wizard you need change the drop down box to **All**.

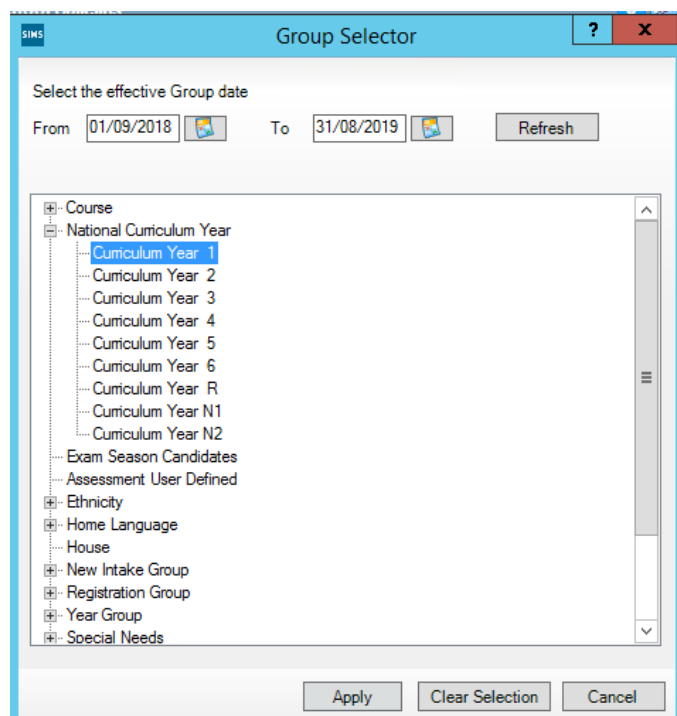
Do not tick the Complete box on the right.

Click on the Wizard you want to work with and click on the **Next** button.

You then need to select a group of pupils.

Select Group

Click on the magnifying glass and the screen shown overleaf will appear.



If you set up a User Defined Group (pages 2-4), click on the **+** symbol next to the **User Defined Groups** category and a list of Groups will be displayed. Click on the name of the group you set up and click on the **Apply** button.

If you did not set up a group, click on the **+** symbol next to the **National Curriculum Year** category. Select the correct Curriculum Year for this Wizard by clicking on the text once, then click **Apply**.

You will be returned to the Wizard screen where your selected group will now be displayed. Click on the **Next** button.

The list of available marksheetworks will be displayed. In 2025 these are the marksheetworks that you need to complete:

- EYFS Revised Profile 2025
- Phonics Screening Year 1 2025
- Phonics Screening Year 2 2025
- KS2 A Teacher Assessments 2025

Click on the name of the marksheet to select and then click on the **Edit Marksheet** button.



The selected marksheet will be displayed.

Entering Your Pupil Scores/Outcomes on the Marksheet

You can now start entering the scores/outcomes for each pupil. These are the available outcomes for each key stage in 2025.

Early Years Foundation Stage

Assessment Rating	EYFS judgement
1	Indicates a child who is at the "emerging" level at the end of the EYFS
2	Indicates a child who is at the "expected" level at the end of the EYFS
A	Indicates a child who has an exemption – see below

"A" Code

The EYFS Profile must be completed for all children registered at the school, including children with SEND and those who have not spent a long time in the setting (for example due to illness, arriving from abroad or not starting at the setting until a substantial part of the year has gone by). The A code (the assessment rating for a child who has an exemption) should only be used for children who have an individual exemption on grounds of religious or philosophical beliefs. **Schools who submit it for any other reason would not be meeting the statutory requirements of the EYFS.**

Please refer to the [EYFSP 2025 Handbook](#) for further details.

Key Stage 2

Reading	Writing	Maths	Science
	GDS – Working at greater depth within the expected standard		EXS – Working at the expected standard
	EXS – Working at the expected standard		HNM – Has not met the expected standard**
	WTS – Working towards the expected standard		
PK1 to PK6 – Pre-Key Stage Standards	PK1 to PK6 – Pre-Key Stage Standards	PK1 to PK6 – Pre-Key Stage Standards	
EM – Engagement Model	EM – Engagement Model	EM – Engagement Model	
A – Absent	A – Absent	A – Absent	A – Absent

Additionally, for **Writing** and **Science**:

- Please use the code L if the pupil has left your school since the Test period in May.
- Please use the code F if the pupil's outcome in these subjects will be reported in a future year – e.g. if they are not going on to study KS3 in September.
- Please use the code P if the pupil's outcome in these subjects has been reported in a previous year – e.g. if they have completed the KS2 programme of study before 2025.

Phonics – Year 1

In the Phonics Year 1 marksheet the following entries are valid for particular columns:

Column	Eligible Entries	Notes
Mark for Phonics Check Year 1	0 to 40	
Grade for Phonics Check Year 1	A or D	Do not enter a score into the Mark column

Phonics – Year 2

In the Phonics Year 2 marksheet the following entries are valid for particular columns:

Column	Eligible Entries	Notes
Mark for Phonics Check Year 2	0 to 40	
Grade for Phonics Check Year 2	A or D	Do not enter a score into the Mark column

In the Year 2 marksheet, remember to click **Calculate** first – this will highlight the pupils who needed to retake the screening check in 2024.

For guidance on how to enter Year 2 scores for new pupils or to flood-fill the 2024 and 2025 Threshold please see the guidance on our Kelsi page:

<https://www.kelsi.org.uk/school-management/data-and-reporting/management-information/key-stage-data-collections>

When you have finished entering scores for all pupils, click on the **Save** button at the top of the screen.

Reports

You can print out pupil and school reports if you wish. Please see page 18 of these notes for guidance.

You now need to create a CTF file in SIMS.net to return your results to Management Information or the Primary Assessment Gateway. Please see below for guidance.

Creating your Return File

The final step is to create a CTF for **each** return (in the form of an XML file) that will contain all your pupil level scores/outcomes

PLEASE NOTE:

There is an extra “page” in the Wizard that creates an export file. Please **do not** go through this process.

Creating an XML file in SIMS.net

From the SIMS homepage go to **Tools | Setups | CTF** and the following screen will appear.

Configure CTF Defaults

Save Undo

1 Directory Details 2 Data to be Imported by Default 3 Data to be Exported by Default

1 Directory Details

CTF import directory W:\CTFIN

CTF export directory W:\CTFOUT

Your directory details may be different – make a note of these two file paths here as you will need to know what they are later on in the process.

CTF Import Directory: _____

CTF Export Directory: _____

If the boxes are blank, you will need to set up the directories. Click on the magnifying glass next to each box and navigate to where your SIMS.net directory is. For example, the path may be:
F:\SIMS\STAR\CTFOut

You now need to select which pupils to transfer results for.

Go to **Routines | Data Out | CTF | Export CTF** and the screen shown below will appear.

Select the CTF export type..

Export Type
General
Phonics Test Results
KS1
KS1 excluding Tests and Tasks
KS2
Early Years Foundation Stage data (FSP)
CME - Leavers
CME - Joiners

 Select  Cancel

You must choose the following options when creating your CTF return file:

EYFSP Early Years Foundation Stage data (FSP)

Phonics Phonics Test Results (for Year 1 and Year 2 retake pupils)

KS2 KS2 You must select NAA (National Assessment Agency) as the Destination LA, not Kent

Please return just one file for Phonics – this should contain all Year 1 pupils and only those Year 2 pupils who needed to retake the Phonics check.

The screen shown overleaf will appear.

1 Student Options

Effective Date: 15/04/2019  View: Current and Leavers this year ☒ Include students already exported  Refresh Students

2 Students

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught
F823299918013	Abbott	Jessica	ASH	R	R
N823299911001	Abdullah	Tamwar	5BB	5	5
K823299913001	Abhra	Abjit	4ES	4	4
Z823299913002	Abhra	Alisha	4ES	4	4
W823299916061	Abhra	Shaquib	ELM	R	R
P823299918001	Abrams	Paul	AM	N2	N2
D823299917001	Ackton	Charlotte	PINE	R	R

Firstly, make sure the view is for **Current and Leavers this year**.

Then ensure that the **Include Students already exported** box is ticked.

Click the **Refresh Students** button.

Now click on the Year Group arrow and select the **relevant year group**.

The pupils will now be filtered.

To transfer results to Kent:

- Left click once in the Destination LA box for the first pupil
- Right click in the same box and choose Select All. The grid will now be outlined in blue
- Click on the down arrow in the Destination LA box for the first pupil. This may resemble 2 vertical lines at the edge of the box.
- Scroll down the list of LAs until you find Kent. Click on Kent and all pupils should now have this destination. You do not need to complete the Destination School column.
- For your KS2 file this must be **NAA (National Assessment Agency)**

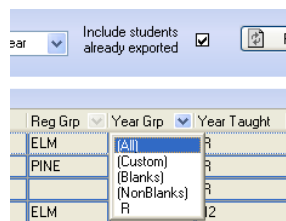
Scroll up and down the list of pupils to ensure they all have the correct Destination LA. If some are missing, click on the **individual** pupil's Destination LA box and complete manually.

Change the Year Group back to **All** when you have attached Kent or NAA to your pupils.

Please ensure that you do not attach a destination LA for any pupils you do not have results/outcomes for. See page 1 for who you should and should not include. To remove the Destination LA from their "row", click on their LA Destination box and scroll to the top where there is a blank line. Click on this and the destination will disappear.

Conversely, if you have had pupils leaving your school who you are required to return results/outcomes for – they must be added to your CTF. If this does not apply to your school, please continue with these notes from the "Export CTF" picture on the next page.

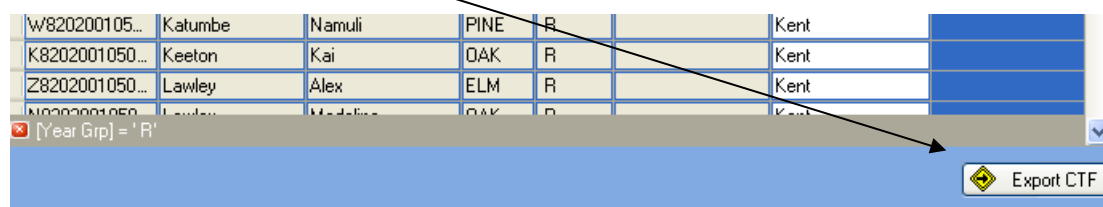
To add these leavers to your file, make sure the Year Group column header displays **All** as shown below.



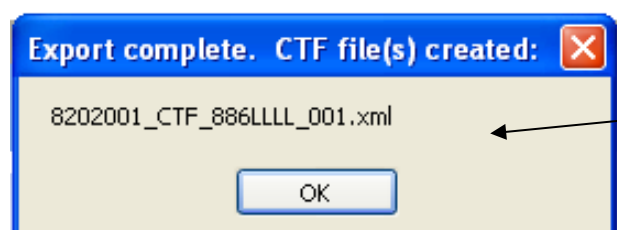
Then click in the Year Group column header again and depending on the pupil, select the correct "bracketed" year group. The brackets round the year group signify that the pupil/s have left.

Add Kent/NAA into the Destination LA box for these pupils the same way as before. When you have done this click the **Year Group arrow** again and change the Year back to **All**. You should then be able to see that all relevant pupils have Kent/NAA listed in the Destination LA box.

When all the relevant pupils have been selected, scroll to the bottom of the screen. To complete the CTF process, click on the **Export CTF** button.



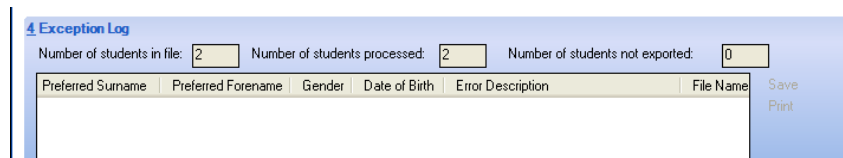
A message may appear about an Address Tidy and Merge. Click on the Yes button to proceed. An egg timer will appear. This is the only visible "working" symbol. When the CTF has been created a dialogue box will appear as shown below.



Write down the file name here:

This is **VERY** important and will be needed later.

Click on **OK** once you have written the file name down.



The Exception Log will appear. Please make sure that the **Number of students in file** is what you expect it to be and that it matches the **Number of students processed**. Number of students not exported should be **zero**.

Any errors regarding missing UPNs or outcomes/scores for this particular key stage **must** be resolved and a new CTF created.

Once a correct CTF file has been produced you can exit SIMS.net. The file now needs to be transferred to Management Information or the Primary Assessment Gateway.

How to transfer your EYFSP and Phonics XML files to Management Information

As in previous years, files for EYFSP, Phonics and KS1 will be transferred via Perspective Lite. This is the website you use to transfer your School Census files to us.

Firstly, open **Internet Explorer** or another internet browser.

Type the website address in the address line <https://perspective.angelsolutions.co.uk> and press return.

- **Login to Perspective Lite** using the login details you use to transfer your census file to us.

Perspective & Lite

Management and improvement toolkit for schools, academies & MATs.

Useful tools, resources and reports for schools & teachers.

Username or Email:

Password:

[Forgotten password?](#)

LOGIN 

By logging in, you are agreeing to the [Terms & Conditions](#) of use.
(Last updated on 20/10/2022)

If you need help with your login details please e-mail Angel Solutions at perspectivesupport@angelsolutions.co.uk or call them on **0845 129 7196**.

Alternatively, if you click on the **Forgotten password?** link you can enter either your username (this is normally the school URN) or your e-mail address and a reminder of your login details will be e-mailed to you. The e-mail address that you enter will need to be the address that is assigned to your Perspective Lite login or the password retrieval will not work.

Once logged in Click the **File Returns** option in the **LA Services/Services** menu and select the **File Requests** tab.

You will see a list of File Requests for your school (example below).

SEND FILES TO ANGELDALE

SEND STANDALONE FILE

BACK

File Requests 1

Standalone Files

Deadline

Current academic year

Issued by

Any

Status

5 selected

Search

NAME OF REQUEST	ISSUED BY	DATE ISSUED	DEADLINE	STATUS	INFO	FILE
KS1 File Request	Andy Kent	27/07/23 10:21	31/07/23	File Required		UPLOAD & SEND

The request issue date and deadline will be displayed here, along with the current status of the collection.

If you have multiple available requests, use the filters at the top of this section to refine your search.

Click **Upload and Send** when you are ready to return your file to us. Search for your file via File Explorer or drag and drop it into the upload section – only files of the correct type will be available for selection.

You can add any additional details or information by typing them in the Comment box.

NOVEMBER COLLECTION

Deadline: 13/11/24

Status: File Required

Issued by: George Seers on 06/11/2024 at 11:46

PDF November files

Required File Type(s): PDF, Zip

UPLOAD YOUR FILE(S)

KS2 Report.pdf

KS1 Report.pdf

KS4 Report.pdf

Phonics.pdf

Drag & Drop files here or click to explore...

Files will be automatically zipped upon sending:

November Collection.zip

Comment:

CANCEL

CONFIRM & SEND FILES

You can add multiple files to a request and send them in one go (these must be for the same data collection).

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Once you are happy with your selection, click **Confirm & Send Files**.

The status of your file will now be marked as Submitted.

DEADLINE	STATUS	INFO
31/07/23	Submitted	

Once all files have been uploaded and sent you can exit Perspective Lite.

Please transfer your XMLs for all relevant Key Stages by no later than:

Tuesday 24 June 2025 – Phonics (All Year 1 and Year 2 Retakes ONLY)
Friday 27 June 2025 - EYFSP

If you have any problems with any of the procedures outlined in this guide please contact:
MIEducation&WiderEH@kent.gov.uk

Management Information Contacts

If you have any problems returning your XML file please contact:

Early Years Foundation Stage

Ben Murray 03000 413156
Matt Ashman 03000 417012

Year 1/2 Phonics

Bethan Jarrett 03000 423200
Brittany Onraet 03000 417245

How to transfer your KS2 Teacher Assessment XML file to the Primary Assessment Gateway

The DfE have written detailed guidance notes on how to submit KS2 TA data – this document should be found here once the Primary Assessment Gateway (PAG) has opened in June:

<https://www.gov.uk/government/publications/key-stage-2-submitting-teacher-assessment-data>

Your teacher assessment data needs to be uploaded to the PAG by **Friday 27 June**.

Please email MIEducation&WiderEH@kent.gov.uk if you have any queries relating to KS2 TA submission.

Reports

There is a facility within each Wizard to print and preview pupil and school reports.

To access the reports, go to:

- Tools | Performance | Assessment | Wizard Manager
- Click on the relevant Wizard and then the **Next** button
- Check that the correct NC Year or user defined group are selected and click **Next TWICE**.

A screen will appear showing the reports available for that particular key stage. You can print or preview each report.

Individual Report Format

Name	Edit Date
KS1 Y1 Phonics Comparative Eng 2019	01/09/2018
KS1 Y1 Phonics Student Eng 2019	01/09/2018

Membership Dates for Group : Curriculum Year 1

From: 16/04/2019 To: 16/04/2019 Refresh

Group Filter

Students

	Surname	Forename	DOB	Reg Grp
☒	Adams	Sadie	20/03/2013	ELM
☐	Alyona	Tatyana	21/12/2012	PINE
☐	Andrews	Richard	02/12/2012	ASH
☐	Bartram	Piers	22/02/2013	ASH
☐	Bennet	Eloise	04/04/2013	PINE
☐	Bronislaw	Tomaz	06/04/2013	OAK

Select All Deselect All

< Back Next > Finish Cancel

This is the **Preview** button.

This is the **Print** button.

The **"cog"** button will upload a copy of the pupil report to the Linked documents on the pupil's record.

The Student Report

If you want to print all the pupils at once, click on the Select All button. All pupil boxes will now be ticked. Click on the Print button **once**.

If you want to preview the report, make sure that just **one** pupil box is ticked then click on the Preview button **once**.

The School and National Report (Comparative)

Make sure only one pupil is "ticked". Click on the Comparative Eng report and click the Preview or Print button. The report displays percentages for all pupils, boys and girls within your school for 2024 and 2023 National results by gender and all pupils.

The reports are opened in Microsoft Word. We advise that you save them to your network for future reference.

When you have finished printing and/or previewing reports click on the **Cancel** button to exit the wizard.