

How to Create a User Defined Group

May 2024

Management Information



This information notice explains how to create a User Defined Group in SIMS if you have pupils joining or leaving your school or if they are listed as being in a different NC Year.

Before you use the new 2024 wizards, you need to 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:

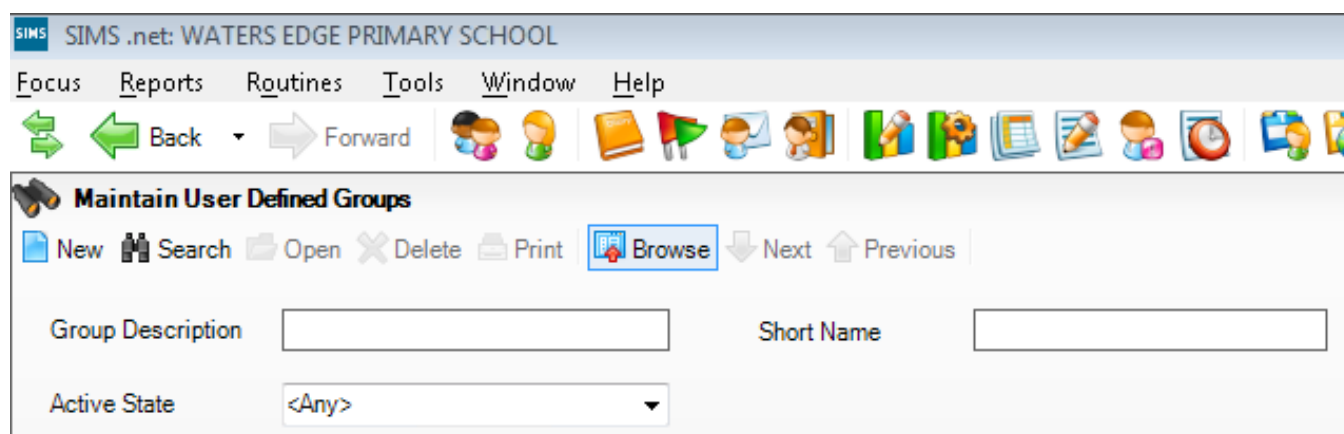
- before the check period – the receiving school should assess the pupil and submit data for them
- during the check period – the receiving school should find out whether the pupil has already taken the check (if not, they should assess the pupil and submit data for them)
- after taking the check – their 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.



SIMS .net: WATERS EDGE PRIMARY SCHOOL

Focus Reports Routines Tools Window Help

Back Forward

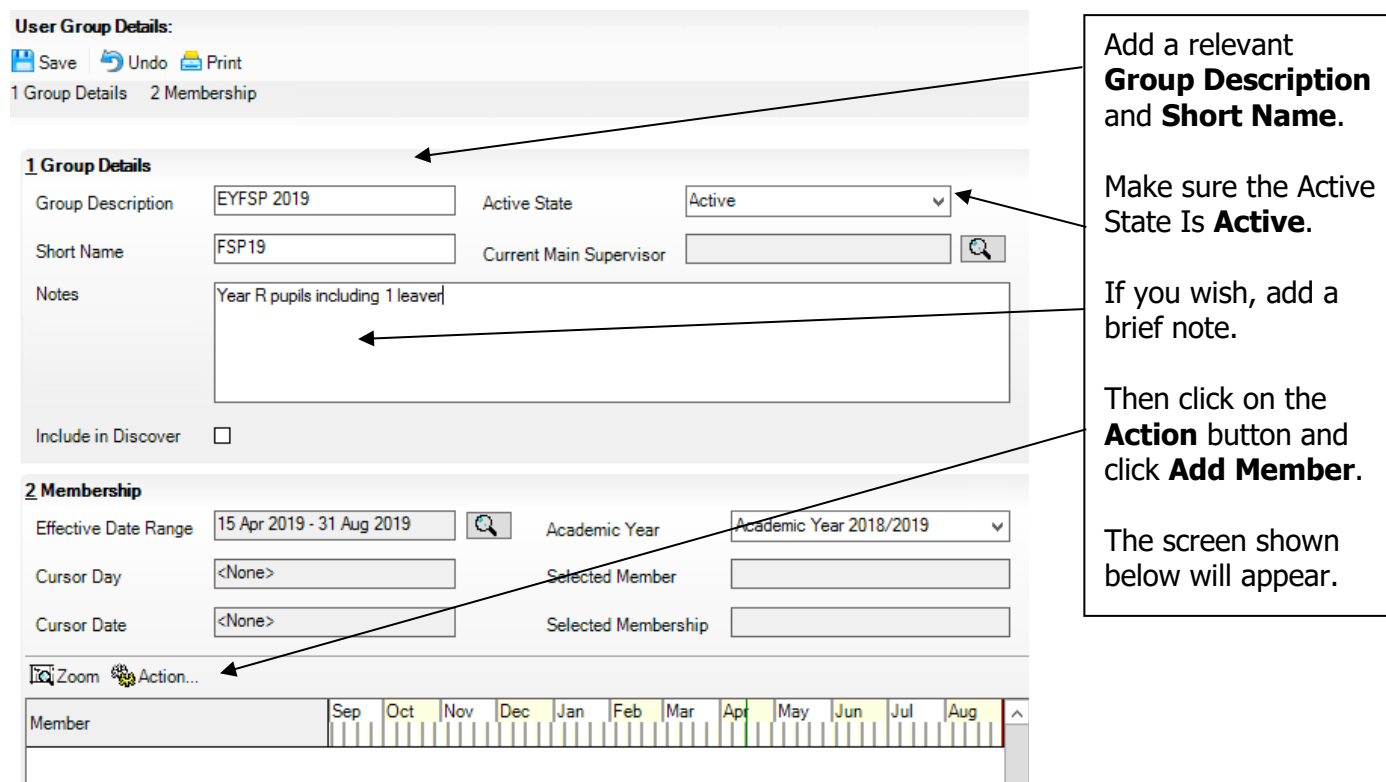
Maintain User Defined Groups

New Search Open Delete Print Browse Next Previous

Group Description Short Name

Active State <Any>

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



User Group Details:

Save Undo Print

1 Group Details 2 Membership

1 Group Details

Group Description EYFSP 2019 Active State Active

Short Name FSP19 Current Main Supervisor

Notes Year R pupils including 1 leaver

Include in Discover

2 Membership

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

Cursor Day <None> Selected Member

Cursor Date <None> Selected Membership

Zoom Action...

Member Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug

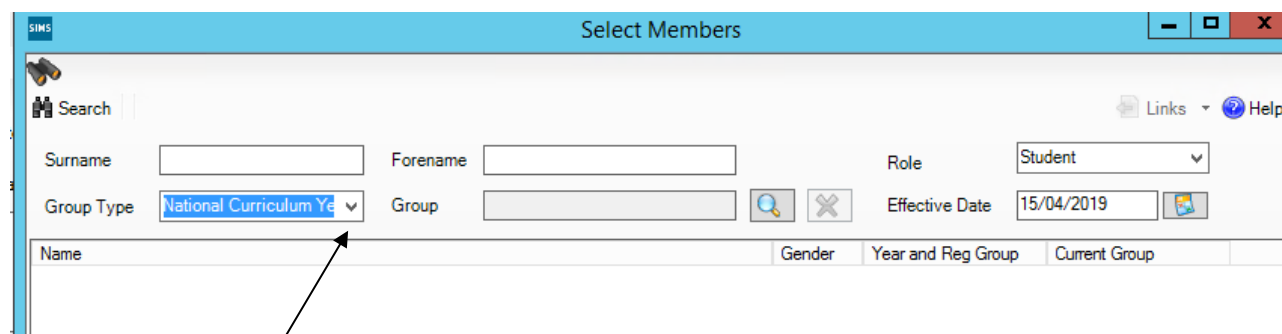
Add a relevant **Group Description** and **Short Name**.

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.



SIMS Select Members

Search Links Help

Surname Forename Role Student

Group Type National Curriculum Year Group Effective Date 15/04/2019

Name Gender Year and Reg Group 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.

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.

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.

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

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.

Details on how to import the Wizards, enter your data and create the return file can be found here:

[Cantium Login - Cantium Portal \(service-now.com\)](https://www.cantium.com/login)

Remember to select your User Defined Group for use within the Wizard and not the NC Year group.

Details on how to return your results file and eligible outcomes for each key stage can be found here:

<https://www.kelsi.org.uk/school-management/data-and-reporting/management-information/key-stage-data-collections> or on request via MIEducation&WiderEH@kent.gov.uk

Please transfer your XML file to Management Information no later than:

EY FSP Friday 28 June via Perspective Lite

Phonics Tuesday 25 June via Perspective Lite

KS2 Friday 28 June via the Primary Assessment Gateway

Please contact us at MIEducation&WiderEH@kent.gov.uk if you have any queries.

Thank you.