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 <u>your</u> 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.

<u>Phonics</u> – 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.

<u>KS2</u>

- 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: WATER	S EDGE PRIMARY S	SCHOOL					
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🚸 Maintain User D	efined Groups						
📄 New 👖 Search 🚿	Open 💥 Delete	🚍 Print 🛛 🐺 Bro	owse 🕂 Next 🗧	Previous			
Group Description			Short Na	ame [
Active State	<any></any>	•					

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

User Group Details:				Γ	
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1 Group Details 2 Mem	bership				Group Description
					and Shutthame.
<u>1</u> Group Details	F				Males auro the Active
Group Description	EYFSP 2019	Active State	Active 🗸 🗸		Make sure the Active
Short Name	FSP19	Current Main Supervisor	0		State 15 Active.
Notes	Year R pupils including 1 leaver				If you wish, add a
					brief note.
					Then elicle on the
Include in Discover					Action Dullon and
2 Membership					CIICK Add Member.
Effective Date Range	15 Apr 2019 - 31 Aug 2019	Academic Year	Academic Year 2018/2019	~	The screen shown
Cursor Day	<none></none>	Selected Membe	r		below will appear.
Cursor Date	<none></none>	Selected Membe	rship		
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Surname		Forename			Role	Student	¥	
Group Type	National Curriculum Ye 🗸	Group		0	Effective Date	15/04/2019	5	
Name				Gender	Year and Reg Grou	p Current Group	р	

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.

N Search Surname Forename Group Group Type National Curriculum Ye ∨ Group Name Harris, Rhys Daniels, James Hollows, Jake White, Theo Kaur, Amir Roberts, Matthew	Gender Male Male Male Male Male	Role [Effective Date] Year and Reg Group RASH RASH RELM RELM RELM	Einks Student Student Current Group Current Group Curriculum Year R Curriculum Year	Help
Search Surname Forename Forename Group Type National Curriculum Ye Group Name Hants, Rrys Daniels, James Hollows, Jake White, Theo Kaur, Ami Roberts, Matthew	Gender Male Male Male Male Male	Role [Effective Date] Year and Reg Group RASH RASH RELM RELM RELM RELM	Student v 15/04/2019 Current Group Curriculum Year R Curriculum Year R Curriculum Year R Curriculum Year R	Help
Surname Forename Group Group Type National Curriculum Ye v Group Name Hanis, Rhys Daniels, James Hollows, Jake White, Theo Kaur, Amir Roberts, Matthew	Gender Male Male Male Male Male Male	Role Effective Date Vear and Reg Group RASH RASH RELM RELM DELM DELM	Student	
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iaur, Amir kobets, Matthew	Male	DELM		_
loberts, Matthew		I LLM	Curriculum Year R	
	Male	RELM	Curriculum Year R	
Vilsons, Emily	Female	RELM	Curriculum Year R	
lenson, Chantal	Female	RELM	Curriculum Year R	
Bordet, Magda	Female	RELM	Curriculum Year R	
udovak, Marika	Female	ROAK	Curriculum Year R	
anes, Nia	Female	RELM	Curriculum Year R	
Jeeves, Rosie	Female	RELM	Curriculum Year R	
imones, Madeline	Female	ROAK	Curriculum Year R	
lowak, Roza	Female	ROAK	Curriculum Year R	
Kaurs, 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 - 3	31 Aug 2019	Q	Academic Year	Academic Year 2018/2019 V
Cursor Day	<none></none>]	Selected Member	Benson, Chantal - RELM
Cursor Date	<none></none>]	Selected Membership	<none></none>
Zoom 🆓 Action					
Member		Sep Oct N	ov Dec	Jan <mark>Feb</mark> Mar	Apr May Jun Jul Aug
Benson, Chantal - RELM	4				
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.

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Surname Forename	Role	Student	•
Group Type <all> v <group< td=""><td>C K Effective Da</td><td>te 15/04/2019</td><td></td></group<></all>	C K Effective Da	te 15/04/2019	
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		~
		ОК	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.

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)

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/managementinformation/key-stage-data-collections or on request via MIEducation&WiderEH@kent.gov.uk

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.