Producing the School Census
Autumn 2015 Return

English Primary/Middle deemed Primary Schools

Applicable to 7.164 onwards
Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Change Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.164 - 1.0</td>
<td>Initial release.</td>
<td>16/06/2015</td>
</tr>
</tbody>
</table>

© Capita Business Services Ltd 2015. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email: publications@capita.co.uk

Please ensure that you include the module name, version and aspect of documentation on which you are commenting.
Contents

01| Introduction ........................................................................................................ 1
   Overview ............................................................................................................. 1
   How has the School Census Autumn Return Changed since Last Year? .................. 2
   Where to Find More Information ...................................................................... 2
   Steps to Producing the School Census Return .................................................. 3

02| Preparing for the School Census Autumn Return ............................................. 5
   Setting Permissions ............................................................................................... 5
   What Version of SIMS is Required? .................................................................... 6
   Preparing Data for the School Census Return ..................................................... 6

03| Producing the School Census Autumn Return ................................................ 9
   Creating a New School Census Return .................................................................. 9
   Configuring the Census Folder ........................................................................... 10
   Specifying the Security Message for Reports .................................................... 11
   Editing Census Details ....................................................................................... 12
      Calculating All Details ..................................................................................... 12
   Editing School Information .................................................................................. 13
   Updating Hours for Early Years Children ............................................................ 14
      Adding/Editing Hours at Setting or Funded Hours .......................................... 15
      Identifying which Pupils have no Hours Recorded ......................................... 17
   Updating Class Types ......................................................................................... 17
      Resetting All Class Types ............................................................................... 20
      Identifying which Pupils have no Class Type Specified .................................. 20
   Updating Pupils with Top-Up Funding ................................................................. 20
   Updating Pupils Adopted from Care .................................................................... 23
   Managing School Dinners Taken on Census Day ................................................ 25
      Using Dinner Money to Calculate School Dinners Taken on Census Day ........... 27
      Using Attendance to Calculate School Dinners Taken on Census Day ............... 28
      Using Manual Entry to Record School Dinners Taken on Census Day ............... 28
   Entering Attendance Information ....................................................................... 29
      SIMS Attendance Users .................................................................................... 29
      SIMS Attendance Not in Use ............................................................................ 31

04| Completing the School Census Autumn Return .............................................. 33
   Creating and Validating a School Census Return ............................................... 33
Resolving Validation Errors and Checking Queries ............. 35
Producing Detail Reports .................................................. 38
Generating Detail Reports .................................................. 41
Printing a Report from your Web Browser .............................. 43
Transferring Report Data to a Spreadsheet ............................ 43
Deleting Temporary Web Browser Files ................................. 43
Deleting the cache in Windows Internet Explorer 10 .......... 43
Deleting the cache in Windows Internet Explorer 8 and 9 .... 44
Producing the Summary Report ............................................ 44
Generating the Summary Report ............................................ 44
Editing an Unauthorised Return ............................................ 45
Authorising the Return ...................................................... 45
Submitting the Return ........................................................ 47
Retrieving Authorised Census Return Files ............................ 48
Copying a Return ............................................................... 48
Deleting an Unauthorised Return .......................................... 49

Index .............................................................................. 51
Introduction

Overview ......................................................................................................................... 1
How has the School Census Autumn Return Changed since Last Year? .................. 1
Steps to Producing the School Census Return ....................................................... 3
Where to Find More Information ............................................................................. 4

Overview

This handbook provides the information needed by Primary/Middle deemed Primary schools in England to complete the School Census Autumn 2015 Return, which this year takes place on Thursday 1 October.

The School Census Autumn Return is required to be completed by maintained Nursery schools, Primary schools, Middle schools, Secondary schools, All-Through schools, Special schools, Pupil Referral Units (PRUs), City Technology Colleges (CTCs) and Academies (including free schools) in England. Non-maintained Special schools are also required to submit the return.

Currently, there are three School Census returns each year (i.e. Spring, Summer and Autumn), which collect detailed information about school characteristics and pupil details. Different data is collected depending on which return is being prepared, and your school phase.

A list of items collected from Primary/Middle deemed Primary schools in England for the School Census Autumn 2015 Return is available in a later section of this handbook (please see Preparing Data for the School Census Return on page 6).

NOTE: The contents of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS to produce the School Census Return.
How has the School Census Autumn Return Changed since Last Year?

Changes to the School Census Autumn Return include the following:

**Adopted from Care**

**Focus | Tools | Statutory Return Tools | Update Adopted from Care**

For clarity, the field that was previously labelled *Ever in Care* (in the Update Students Adopted from Care panel) has been renamed to *Ever in Care at this school*.

**Routines | Statutory Return | School Census**

- Adopted from care pupils are now carried forward automatically every term, e.g. from Summer to Autumn.
- If there are no pupils recorded as being adopted from care, a warning message is displayed when the Create & Validate button is clicked.

More Information:

Updating Pupils Adopted from Care on page 23

**Where to Find More Information**

Online help can be accessed by pressing F1 or clicking the applicable Help button in SIMS.

A wide range of documentation is available from the SIMS Documentation Centre, including handbooks, quick reference sheets and tutorials. Click the Documentation button (located on the top right-hand side of the SIMS Home Page) select the required category and then select the required document.

These and other documents are also available from the My Account website (https://myaccount.capita-cs.co.uk). The most popular documents can be located by selecting Knowledge Base, SIMS Publications (located in the Popular Searches list) and then clicking the Find button. Alternatively, use the search facility on the My Account Home Page to display a list of all Documents containing the search criteria.

- Select the product you need help with to filter search results.
- Surround a phrase with double quotes to find that exact phrase.
- Prefix words with + to make them essential.
- Prefix words with - to exclude them from results.

In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, together with an Errors and Resolutions document that provides suggestions on how to resolve any validation errors or queries, are also available.

To access the School Census documents, please search for CENSUS15 in the SIMS Documentation Centre or My Account.
Steps to Producing the School Census Return

The process of producing the School Census can be separated into a number of steps, some of which might need to be repeated in order to eliminate validation errors and queries.

1. Upgrade to the latest available release of SIMS
2. Configure the Census Folder and specify the Security message for Reports.
3. Ensure that school details and pupil/student details are correct and up-to-date.
4. Start a new return
5. Calculate All Details
6. Check all information displayed on the Census Return Details page and edit, if required.
7. Create and validate the return.

- **YES**
  - Produce the Validation Errors Summary report to assist with the resolution of errors and queries.
  - Produce the detail reports and the Summary report to assist with the resolution of errors and queries.
  - Resolve errors and check queries.

- **NO**
  - Produce the Summary report then check the report content to ensure that the return is acceptable before authorising the return.

8. Authorise the return.
   - Confirm that the Head Teacher is satisfied that the return file is ready for upload.
   - Enter additional text to be displayed on the authorisation report, if required.

   On authorise, the Validation Errors Summary report, Summary report and Authorisation report are generated and displayed in your web browser. All reports (including the detail reports) can be viewed via the Railwise Authorised Census Return Files routine.

9. Submit the return.
01 Introduction
Preparing for the School Census Autumn Return

Setting Permissions

The following permissions are applicable to users who deal with returns.

Producing the Return

To produce the return, you must be a member of the Returns Manager user group in System Manager.

Editing and Preparing Data

Users who edit and prepare data must have permissions to access other areas of SIMS, e.g. pupil details, school details, etc. These users must be a member of any of the following user groups in System Manager:

- Administration Assistant
- Admissions Officer
- School Administrator.

Importing Revised Files

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS), to be imported into SIMS between SIMS releases. To use the Import Fileset functionality (via Tools | Setups | Import | Fileset), you must be a member of any of the following user groups in System Manager:

- Personnel Officer
- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available on the My Account website (https://myaccount.capita-cs.co.uk).

Where to find More Information about Permissions

Please see your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the Managing SIMS Users, Groups and Databases handbook.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (https://myaccount.capita-cs.co.uk). To find the spreadsheet, search for <sims version> sims permissions spreadsheet, e.g. 7.164 sims permissions spreadsheet.
Preparing for the School Census Autumn Return

What Version of SIMS is Required?

In order to run the return, you must have the SIMS 2015 Summer Release (7.164) or later installed.

To check the version of SIMS installed, open SIMS then select Help | About SIMS. A dialog similar to the following graphic is displayed.

The version should read 7.164 or later.

Preparing Data for the School Census Return

Before beginning the process of producing the return, it is advisable to spend time ensuring that all school level and pupil level information is present and accurate in SIMS. For example, ensure that school details are correct, all new pupils have been added to SIMS, all leavers have been recorded and where applicable all exclusions have been recorded, etc.

The following information is collected from Primary/Middle deemed Primary schools for the School Census Autumn 2015 Return.

School Level Data

Characteristics: LA number, DfE establishment Number, school name, school phase, school type, highest national curriculum year, lowest national curriculum year, intake type, governance, school email address and school telephone number.

Pupil Level Data

- Pupil Identifiers: UPN, former UPN, surname, forename, middle names, former surname, preferred surname, date of birth and gender.
- Characteristics:
  - language code, adopted from care
  - school dinner taken (applicable to schools with pupils in Reception, Year 1 and Year 2)
  - free school meal eligibility (22/05/2015 to 01/10/2015) : start date, end date and UK country in which the eligibility applies
  - top-up funding indicator, funded hours and hours at setting
  - Youth Support Services Agreement (YSSA) indicator (Middle deemed Primary schools only).
- Status: enrolment status, date of entry, date of leaving, part-time indicator, boarder indicator, actual national curriculum year group and type of class (Primary schools only).
- Special Educational Needs: SEN provision.
- Home Information: pupil’s home address.
- Exclusion Information (01/01/2015 to 05/04/2015): category, reason, in care indicator, SEN provision, start date and actual number of sessions.
- Attendance Information (06/04/2015 to 31/07/2015): possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the appropriate Preparing for the School Census Autumn 2015 guide. The preparation guide, together with other useful School Census documentation, can be found on the My Account website (https://myaccount.capita-cs.co.uk) by using the search facility to find CENSUS15 documentation.
Producing the School Census Autumn Return

Creating a New School Census Return .............................................................. 9
Configuring the Census Folder ......................................................................... 10
Specifying the Security Message for Reports .................................................. 11
Editing Census Details ....................................................................................... 12
Editing School Information ................................................................................. 13
Updating Hours for Early Years Children ........................................................ 14
Updating Class Types ......................................................................................... 17
Updating Pupils with Top-Up Funding .............................................................. 20
Updating Pupils Adopted from Care .................................................................. 23
Managing School Dinners Taken on Census Day ............................................. 25
Entering Attendance Information ...................................................................... 29

Creating a New School Census Return

Before creating a new return, ensure that all pupil and school information is present and accurate in SIMS.

It is possible to create more than one return, enabling you to carry out dry runs so that you can check what data needs to be added or updated. Any unwanted returns can be deleted (providing they have not been authorised).

Data is collected for the following pupils:

- All pupils on-roll on 01/10/2015 (census day).
- Any additional pupils not on-roll on 01/10/2015 (census day) who:
  - attended school at any time during the previous term (06/04/2015 to 31/07/2015).
  - were subject to any type of exclusion in the previous Spring term (01/01/2015 – 05/04/2015).

1. Select **Routines | Statutory Returns | School Census** to load the School Census validation and reporting files.

**NOTE:** The first time that the **Routines | Statutory Returns | School Census** menu route is selected during each SIMS session, there is a delay while the School Census files are loaded.
When the files are loaded, the **Census Return** browser is displayed.

**NOTE:** The Fileset ID is displayed in the browser header (for information only).

By default, the **Term** field displays the appropriate term for the selected return, in this instance **Autumn 2015**.

**NOTE:** The Spring or Summer census can be selected and run, if required.

2. Ensure that the **Census Folder** is selected correctly and that the required **Security message for Reports** is specified, as described in the following sections.

**More Information:**
- Specifying the Security Message for Reports on page 11
- Deleting an Unauthorised Return on page 49

**Configuring the Census Folder**

Before creating a return, the folder in which the return file will be saved must be specified.

**IMPORTANT NOTE:** Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

You should be mindful of your school’s responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. The DfE recommends ISO27001 as the standard for information security ([http://www.itgovernance.co.uk/iso27001.aspx](http://www.itgovernance.co.uk/iso27001.aspx)). If you are in any doubt, consult with your IT Security Officer before proceeding.
1. Specify the folder where the return files are to be stored by entering the folder location in the **Census Folder** field. Alternatively, click the **Browse** button to display a standard Windows® **Browse For Folder** dialog.

![Browse button](image)

Navigate to the location of the required folder and highlight it. If a suitable folder does not exist, click the **Make New Folder** button and enter a suitable name for the new folder.

2. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.

**IMPORTANT NOTE:** If you are changing the location of the folder, ensure that only authorised personnel have access to the new folder, as it will contain sensitive data. For more information, please see the important note at the beginning of this section.

3. Ensure that the **Security Message for Reports** is appropriate for your school.

**Specifying the Security Message for Reports**

At the bottom of the browser is a **Security Message for Reports** field, which contains text that will be displayed at the top of each report.

1. The security message text defaults to This report contains sensitive information, but can be edited, if required.
2. If any edits are made, you can click the **Default Message** button to revert to the default text.
3. Click the **New** button to display the **Census Return Details** page.
Editing Census Details

The **Census Details** panel displays the following read-only information:

- Census Date 01/04/2015.
- Attendance data collected from 06/04/2015 to 31/07/2015.
- Exclusions data collected from 01/01/2015 to 05/04/2015.
- FSM (Free School Meal) data collected from 22/05/2015 to 01/10/2015.

The default **Description** *(School Census Autumn 2015)* can be edited, if required, e.g. when carrying out a dry run.

**WARNING:** Each description used must be unique. An error message is displayed if SIMS identifies a duplicate description.

A unique description helps to identify the required return when viewed in the **Census Return** browser and can be particularly useful when creating dry runs, or copies of existing returns.

Calculating All Details

Clicking the **Calculate All Details** button extracts the required information from SIMS and displays the results in the applicable panels of the **Census Return Details** page.

**IMPORTANT NOTE:** You must calculate all details at least once to populate the various panels for each return.

Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in SIMS.

Any details that are calculated automatically should be checked and edited, if required.

1. Click the **Calculate All Details** button.

A message advises that any existing data currently shown on the **Census Return Details** page will be overwritten.
2. Click the **Yes** button to calculate all details. At this point, depending on the number of pupils in the school, there may be a short delay while details are calculated.

The applicable panels on the **Census Return Details** page are populated with data.

3. The return can be saved at any point by clicking the **Save** button.

### Editing School Information

The **School Information** panel displays details that have previously been recorded on the **School Details** page in SIMS (**Focus | Pupil | Pupil Details**). The information displayed may vary depending on your school and the details entered, e.g. Academy specific information.

The details displayed are read-only but can be amended if necessary via the **School Detail** button.

1. If any details are missing or incorrect, click the **School Detail** button to display the **School Detail** dialog, where information applicable to your school is displayed.
Producing the School Census Autumn 2015 Return

2. Add or amend the school details, selecting from the drop-down lists where applicable.

**NOTE:** The **Establishment Number** and the **School Phase** cannot be edited. If the information displayed is incorrect, please contact your Local Support Unit.

**Information for Academies:**

Academies should ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.
  Select **Academies** from the applicable drop-down lists.
- The school’s **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Date Number Changed**.
  This information is used by School Census. If the DfE number has changed for sponsor-led Academies, historical information is not collected and the date of arrival is reported as the date the DfE number changed.
- The **Previous URN Number** and **Date Number Changed**.
  **NOTE:** The date that the establishment’s URN changed is used by other census returns.

3. Click the **Save** button then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

**Updating Hours for Early Years Children**

Applicable to schools with 2, 3 or 4 year old pupils

Hours at Setting and Funded Hours are collected from all schools that have pupils aged 2, 3 and 4 on-roll on census day. The hours collected in this return are for the week in which the census day falls.

Hours at Setting reflects the number of hours that the child attends the setting during census week.

Funded Hours signifies the level of free entitlement of education attracted by the child in that setting. This data is used to determine the Dedicated Schools Grant allocation, which the DfE uses to fund Local Authorities for the provision of education.

All schools (with the exception of City Technology Colleges and non-maintained Special schools) are required to submit the Funded Hours as a separate data item, while still providing Hours at Setting.

Data is collected about pupils whose date of birth falls in the date range 01/09/2010 to 31/08/2013 inclusive.

<table>
<thead>
<tr>
<th>Age</th>
<th>Date of Birth Range</th>
<th>Maximum Entitlement to Funded Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>two and three</td>
<td>01/09/2011 and 31/08/2013 inclusive</td>
<td>15 hours</td>
</tr>
<tr>
<td>four</td>
<td>01/09/2010 and 31/08/2011 inclusive</td>
<td>25 hours</td>
</tr>
</tbody>
</table>
If Hours at Setting and/or Funded Hours have been recorded previously via Tools | Statutory Return Tools | Update Hour for Early Years, the values are displayed in the Hours for Early Years panel.

The Hours for Early Years panel is read-only. However, you can review and edit the number of Hours at Setting and Funded Hours by clicking the Edit button.

Adding/Editing Hours at Setting or Funded Hours

1. Click the Edit button to display the Update Hours page. By default, the current Term is displayed in the Census panel.

If you wish to view the data recorded for a previous Term (in the current calendar year), select as required from the drop-down list.

Provided that Early Years Attendance Patterns have been defined (via Focus | Pupil | Pupil Details) for pupils who are receiving free nursery care, the Hours at Setting can be updated automatically.
2. Click the **Update Hours** button to display the number of Hours at Setting that the listed pupils are expected to attend during the census week (based on the early years provision times recorded as part of their attendance pattern).

   **NOTE:** If your school does not use the Define Early Years Attendance Patterns functionality, the data can be entered in the grid manually.

3. To add or edit the number of **Hours at Setting** (or **Funded Hours**) for an individual pupil, select the required criteria from the options in the **Pupils View** panel.

   In the **Pupils** panel, highlight the required pupil then click the applicable cell and enter the required number of hours.

   **IMPORTANT NOTE:** The number of hours entered per pupil must be between 0.0 and 99.5. Hours must be entered in increments of 0.5 only.

4. If most of the pupils are receiving the same number of hours, the following method can be used to quickly populate the column:
   a. In the **Pupils View** panel, select the required year group from the **Year Taught In** drop-down list. The selected pupils only are displayed in the **Pupils** panel.
   b. Right-click in the **Pupils** panel then select **Select All** from the drop-down list.
   c. Click in one of the highlighted cells of the column you wish to populate, i.e. **Hours at Setting** (or **Funded Hours**), then enter the number of hours that is applicable to the majority of pupils.
      The number is entered automatically for all selected pupils.
   d. Click to the right of the grid to deselect all.
   e. Edit the entry for each pupil who is receiving a different number of hours.
      This is achieved by highlighting the required pupil, clicking in the associated **Hours at Setting** (or **Funded Hours**) cell, as applicable, then entering the required number.

5. Click the **Save** button. If there are any pupils where zero hours have been recorded, a message is displayed. Click the **Yes** button to save the data or the **No** button to return to the **Update Hours** page where the number of hours can be entered.
6. Click the OK button to return to the Census Return Details page, where the updated hours are displayed.

**IMPORTANT NOTES:**
If, while completing the return, any of the following processes are performed, click the Recalculate button (located on the top right hand side of the panel) to ensure that the up-to-date data is displayed in the Hours for Early Years panel:

- Hours at Setting or Funded Hours are edited via the Tools menu
- a new pupil is added in SIMS
- a pupil’s date of birth is amended.

Please note that updating Hours at Setting or Funded Hours on the Update Hours for Early Years page, updates the display in the Hours for Early Years panel automatically.

**Identifying which Pupils have no Hours Recorded**

1. On the Census Return Details page, click the Edit button (located in the Hours for Early Years panel) to display the Update Hours for Early Years page.

2. In the Pupils View panel, ensure that the required Age at date, Year Taught In and Reg group are selected then select No Hours at Setting (or No Funded Hours) from the Status drop-down list.

   Only pupils who do not have an entry for Hours at Setting (or Funded Hours) are displayed.

3. Enter the required values for these pupils as previously described.

4. Click the Save button.

**Updating Class Types**

The type of class (either Nursery or Other) that each pupil belongs to on census day must be specified. Pupils in your Nursery class should be specified as Nursery, with all other pupils specified as Other.

If the class types have previously been recorded via Tools | Statutory Return Tools | Update Class Type, they are displayed in the Class Type panel.

![Class Type panel](image)

The Class Type panel is read-only. However, you can review, edit and save class types by clicking the Edit button.
1. Click the **Edit** button to display the **Update Class Type** dialog.

![Update Class Type dialog](image.png)

**NOTE:** If new pupils exist the default class type is displayed as blank.

2. To specify the class type for an individual pupil, click the appropriate cell of the **Nursery** or **Other** column to enter a tick. Clicking again removes the tick, if necessary.

3. If all or the majority of pupils need to be assigned the same class type, the following method can be used to quickly populate the **Nursery** and **Other** columns:
   a. Right-click the **Other** column header then select **Check All** from the pop-up menu.

   ![Check All](image.png)

   b. In the **View Pupils** panel, select **Year N2** from the **Year Taught In** drop-down list.

   Year N2 pupils only are displayed in the **Pupils** panel.
c. Right-click the **Nursery** column header then select **Check All** from the pop-up menu.

```
Update Class Type

Census

Pupil

Name | Date of Birth | Gender | AdNo  | YTI | Reg | Nursery | Other

Ali, Ali  | 20/04/2006  | Male   | 001234 | N2 | AM |
Ali, Ashley | 20/04/2011 | Female | 001357 | N2 | PM |
Ali, Isla | 20/04/2012 | Male   | 001384 | N2 | AM |
Ludlow, Sam | 22/09/2011 | Male   | 001399 | N2 | AM |
Barber, Justin | 22/06/2011 | Male   | 001430 | N2 | AM |

Right-click the Nursery column header then select Check All from the pop-up menu.
```

d. Repeat steps b and c for any additional Nursery classes.

e. To ensure that your selection is correct, select **All** from the **Year Taught In** drop-down list then check the data displayed.

```
4. Click the **Save** button.
```

Producing the School Census Autumn Return 2015 Return | 19
5. If a message is displayed advising you that some pupils have not been assigned a class type, click the No button then ensure that a class type is allocated to every pupil before saving again.

**IMPORTANT NOTE:** Not assigning a class type to every pupil will result in a validation failure when the School Census file is created.

6. Click the OK button to return to the Census Return Details page, where the updated class types are displayed in the Class Type panel.

**Additional Resources:**

*Preparing for the School Census Autumn 2015 Return* handbook

**Resetting All Class Types**

To reset all class types, right-click the Nursery (or Other) column header then select Remove All from the pop-up list. The Nursery (or Other) column is cleared of all ticks.

Re-enter the correct class types as previously described.

**Identifying which Pupils have no Class Type Specified**

To ensure that all pupils are assigned to a class type, select No Class Type from the Status drop-down list in the Pupils View panel on the Update Class Type page. Any pupils without a Class Type are displayed in the Pupils panel.

**Updating Pupils with Top-Up Funding**

Top-up funding is supplied to schools, in most cases by the Local Authority, to meet the additional costs of support for high needs pupils.

The Top-up Funding panel enables you to record the on-roll pupils for whom your school is receiving top-up funding on census day.

If the pupils with top-up funding have been recorded previously via Tools | Statutory Return Tools | Update Top-Up Funding, the data is displayed in the Top-up Funding panel.

The information displayed in the Top-up Funding panel is read-only. Updating top-up funding information, e.g. adding or removing a pupil, must be done via the Edit button.
1. Click the **Edit** button to display the **Update Pupils with Top-up Funding** dialog. The pupils currently recorded as having top-up funding are displayed in the **Top-up Funding** section.

2. Use the search criteria to locate the additional pupils you wish to record as having top-up funding then highlight their details.
3. Click the **Add** button. The highlighted pupils are displayed in the **Top-up Funding** table.

4. To remove a pupil from the list, highlight the required pupil then click the **Remove** button. The pupil's record is displayed in the first table, providing a chance to reselect the pupil, if required.

5. Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.

6. Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.

**Additional Resources:**

*Preparing for the School Census Autumn 2015 Return* handbook
Updating Pupils Adopted from Care

The Adopted from Care routine enables you to record which pupils were looked after immediately before adoption and whether documentary evidence exists to prove DfE/Ofsted compliance. It is not compulsory for adoptive parents, etc. to inform the school of this information.

If the pupils who have been adopted from care have been recorded previously via Tools | Statutory Return Tools | Update Adopted from Care, the data is displayed in the Adopted from Care panel.

The information displayed in the Adopted from Care panel is read-only. Updating the adopted from care information, e.g. editing the Adopted from Care status or adding a pupil to the list of pupils adopted from care, must be done via the Edit button.

1. Click the Edit button to display the Update Pupils Adopted from Care dialog. The pupils currently recorded as being adopted from care are displayed in the Adopted from care table.
2. Use the search criteria to locate the additional pupils you wish to record as being adopted from care then highlight their details.

3. Click the Add button. The highlighted pupils are transferred to the Adopted from care table. One or more pupils can be selected by using the Ctrl+click or Shift+click functionality.
4. Ensure that the correct adopted from care status is displayed for all the pupils by clicking the **Adopted from Care** cell then selecting the applicable status from the drop-down list:

- **Ceased to be looked after through Adoption**
- **Ceased to be looked after through a Special Guardianship Order (SGO)**
- **Ceased to be looked after through a Residence Order (RO)**
- **Ceased to be looked after through a Child Arrangement Order (CAO)**.

**NOTE:** *Ceased to be looked after through a Residence Order (RO) has been replaced by Ceased to be looked after through a Child Arrangement Order (CAO).*

5. If applicable, select the **Evidence Obtained** check box to indicate that document(s) have been obtained providing evidence that the pupil has been adopted from care. Such documents are confidential and **must** be stored securely.

6. To remove a pupil from the list, highlight the required pupil then click the **Remove** button. The pupil's record is displayed in the first table, providing a chance to reselect the pupil, if required.

7. Click the **Update** button to save the data and arrange the list of pupils in **Surname** order.

   If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.

8. Click the **OK** button (located at the bottom right hand-side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Adopted from Care** panel.

**NOTE:** *The Evidence Obtained information is not collected in the return and is therefore not displayed in the Adopted from Care panel.*

---

**Additional Resources:**

*Preparing for the School Census Autumn 2015 Return* handbook

---

**Managing School Dinners Taken on Census Day**

**Applicable to schools with pupils in Reception, Year 1 and Year 2**

All pupils in Reception, Year 1 and Year 2 in English state-funded schools are offered a Universal Infant School Meal, i.e. a hot meal at lunchtime. This applies to Academies, Free Schools and Pupil Referral Units, as well as to schools maintained by the local authority. The School Census Autumn 2015 Return collects information about pupils who receive a Universal Infant School Meal (school dinner) on census day.

The **School Dinner Taken** panel displays all pupils in Reception, Year 1 and Year 2 who are on-roll on census day. The options available in the panel enable you to record pupils who have taken a Universal Infant School Meals on census day, so that accurate data can be included in the census.
NOTES: The Reference Date is provided so that your school can report school dinners taken on an alternative date to census day, if required. The pupils listed in the School Dinner Taken panel are those who are on-roll on census day. Whereas the data calculated via the Calculate From Attendance and the Calculate From Dinner Money buttons is based on the reference date.

If your school uses SIMS Dinner Money or SIMS Attendance, the number of dinners taken on census day can be calculated using the data recorded when using these modules. If either or both of these modules are not in use, the applicable Calculate From... button(s), as displayed in the following graphic, are not displayed but the information can be recorded manually.

1. By default, the Reference Date is set to 01/10/2015 (census day). If, due to exceptional circumstance, e.g. flooding, pupils were unable to take a school dinner on census day, the reference date can be changed to a date that reflects the normal situation.

2. Click the required column header to sort the data.

3. The Calculate From Attendance button is displayed only if SIMS Attendance is in use.

4. The Calculate From Dinner Money button is displayed only if SIMS Dinner Money is in use.

5. When the Reset button is clicked all existing ticks are removed from the School Dinner Taken column enabling you to start the process again.

6. The Total Taken and Total Not Taken provide an indication of whether the number of school dinners taken is correct or whether edits are required.

After the return has been created and validated, the School Dinner Taken detail report can be run to assist with the checking of results.
Using Dinner Money to Calculate School Dinners Taken on Census Day

If SIMS Dinner Money is in use, the Dinner Money data recorded for census day can be used to calculate the number of school dinners taken on census day.

Many users of SIMS Dinner Money also use SIMS Attendance. If this is the case the Calculate From Attendance button is also displayed.

However, it is recommended that the Calculate From Dinner Money routine is used in the first instance. This is because the Calculate From Attendance routine looks at all pupils with a present or late attendance mark on census day morning. These pupils could be taking any sort of meal on census day, e.g. going home for lunch, pack lunch brought from home, as well as meals provided by the school. The School Census return is only interested in school meals provided by the school.

SIMS Dinner Money takes into account these different meal types and populates the School Dinner Taken column with ticks where meals provided by the school only have been taken.

1. Click the Calculate From Dinner Money button.

**WARNING:** Clicking the Calculate From Dinner Money button overwrites all existing data in the School Dinner Taken panel.

If SIMS detects missing information, the following message is displayed:

Dinner Money information is incomplete. Please ensure that meals are recorded in Dinner Money.

2. Click the Cancel button to return to SIMS where the missing information can be entered or the OK button to continue.

A tick is entered against each pupil who is receiving any type of meal provided by the school on census day. These meals have a meal type category of School Provided, with a description such as hot school meal or school sandwich.

3. Edit the information by clicking the required row, in the School Dinner Taken column, to toggle between a tick and blank (no meal taken), as required.
Using Attendance to Calculate School Dinners Taken on Census Day

The School Census Return only requires information about school meals provided by the school on census day. However, if SIMS Attendance is in use, the attendance data recorded for census day morning can be used to calculate all pupils who are present and are likely to be taking a school dinner.

The information calculated from attendance can be edited to so that school meals provided by the school only are collected in the return.

1. Click the **Calculate From Attendance** button.

**WARNING:** Clicking the **Calculate From Attendance** button overwrites existing data in the **School Dinner Taken** panel.

If missing marks exist, a message is displayed:

**Please ensure that registers have been taken. Missing marks have been interpreted as absent and no dinner taken.**

2. Click the **Cancel** button to return to SIMS where missing marks can be entered or the **OK** button to continue.

A tick is entered against each pupil who is marked as present on census day morning (i.e. AM session). It is possible that some of these pupils are not taking meals provided by the school, e.g. they go home for dinner or bring a packed lunch from home. Meals provided by the school only are required for the return.

Use the **Group By** functionality to group pupils by **Year Taught In**, **Reg Group** or **Enrolment Status**, enabling school dinners taken information to be updated from class lists, etc.

3. Edit the information by clicking the required row, in the **School Dinner Taken** column, to toggle between a tick and blank (no meal taken), as required.

Using Manual Entry to Record School Dinners Taken on Census Day

If your school is not using SIMS Dinner Money or SIMS Attendance the number of school dinners taken on census day (i.e. meals provided by the school) can be entered manually.

1. Click the **Tick All** button to populate the **School Dinner Taken** column. All pupils are ticked indicating that they received a school dinner on census day.

2. Edit individual records by clicking the applicable **School Dinner Taken** cell to toggle between a tick and blank (no meal taken).
03| Producing the School Census Autumn Return

The **Total Taken** and **Total Not Taken** (located at the bottom of the panel) provide an indication of whether the number of school dinners taken is correct or whether further edits are required.

3. After the return has been created and validated, run the School Dinner Taken detail report then check the report contents.

4. Continue editing until school dinner taken details are correct.

**WARNING:** Clicking the **Reset** button removes all existing ticks from the **School Dinner Taken** column.

### Entering Attendance Information

Summer term attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder pupils aged four to 15 inclusive on 31/08/2014 who were on-roll for at least one session during each Summer half term, i.e. from 06/04/2015 to 24/05/2015 and 25/05/2015 to 31/07/2015.

**IMPORTANT NOTE:** Clicking the **Calculate All Details** button overwrites any edited data in every panel with the original data stored in SIMS. Do not use this button if you wish to keep any changes you have made.

After the **Calculate All Details** button is clicked, the information displayed in the **Attendance** panel is dependent on which of the following is applicable to your school:

- Attendance/Lesson Monitor is in use, the attendance codes being used are DfE compliant and there are either missing marks or no missing marks.
- Attendance/Lesson Monitor is in use and the attendance codes being used are DfE non-compliant.
- Attendance/Lesson Monitor is not in use.

### SIMS Attendance Users

If SIMS Attendance is in use, ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

**TIP:** After the Create and Validate process is run, the Attendance detail report can be used to assist with the checking of attendance data. Select **Attendance Report** from the **Detail Report** drop-down list.

### Are your Attendance Codes DfE Compliant?

If Attendance is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are no missing marks.
If all attendance marks have been entered in Attendance, the following message is displayed in the Attendance panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.

However, if any missing attendance marks are detected, the following message is displayed in the Attendance panel, requesting that you add the missing attendance marks.

5. Use the Deal with Missing Marks routine (Focus | Attendance | Deal with Missing Marks) to locate the missing marks and enter appropriate attendance codes.

6. Return to the Census Return Details page and click the Check missing marks button in the Attendance panel to ensure that all missing marks have been dealt with.

**NOTE:** The Create and Validate process can still be run even if some attendance marks are missing. You will be asked if you wish to continue to create the return or cancel the Create and Validate process.

More Information:
Producing Detail Reports on page 38

Are your Attendance Codes DfE Non-Compliant?

If Attendance is in use but one or more invalid attendance codes have been detected, e.g. the F, Z or @ code is in use, a message is displayed in the Attendance panel to inform you that your attendance codes are not DfE compliant.
1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.

2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use. If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.

3. Click the **OK** button to continue.

**SIMS Attendance Not in Use**

If Attendance is not in use, the following data must be entered manually for the two specified collection periods, i.e. 06/04/2015 to 24/05/2015 and 25/05/2015 to 31/07/2015:

- **Total Possible Sessions** (**T Poss Sessions**)
- **Total Sessions Missed due to Authorised Absence** (**T Auth Absences**)
- **Total Sessions Missed due to Unauthorised Absence** (**T Unauth Absences**).

1. To filter the display of pupils in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.

   Alternatively, select **Group by None** to display a list of all pupils.

2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column heading.
3. For each pupil, enter the total number of possible sessions (T Poss Sessions), authorised absences (T Auth Absences) and unauthorised absences (T Unauth Absences) for each of the collection periods.

4. To clear the attendance information and check for additional pupils, click the Check for additional students & zero totals button.

**WARNING:** If the Check for additional students & zero totals button is clicked, any attendance data entered manually is lost.
Completing the School Census Autumn Return

Creating and Validating a School Census Return

A return must be created, validated and authorised before it can be sent to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school). Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

An error is caused by either missing or inaccurate data, whilst a query highlights data which is unusual or not as expected, e.g. there are no pupils with special educational needs.

1. Select Routines | Statutory Returns | School Census to display the Census Return browser.
2. Click the Search button to display a list of returns.
3. Double-click the required return to display the Census Return Details page.
4. Click the Create & Validate button to begin the process. There may be a short delay, depending on the number of pupils at your school.
A progress bar is displayed indicating that the Create and Validate process is being performed.

If there is an irregularity in the attendance marks, one of the following messages is displayed:

- If the attendance codes are not DfE compliant, the following message is displayed, informing you which code(s) must not be used.

The lack of compliance must be dealt with before the Create and Validate process can be performed. Please contact your Local Support Unit for assistance.

- If no attendance marks are found and SIMS Attendance is in use, the following message is displayed informing you that the Create and Validate process cannot proceed.

Click the OK button then edit the attendance data before attempting to create and validate the return again.
If there are any missing attendance marks, the following message is displayed enquiring as to whether you wish to continue with the Create and Validate process.

Click the **Yes** button to continue creating and validating the data. Alternatively, click the **No** button to cancel the process, then use the Deal with Missing Marks routine (**Focus | Attendance | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes. For more information, please refer to the *Managing Pupil/student Attendance* handbook, as appropriate.

When the validation process is complete, the **Validation Errors Summary** panel is displayed at the bottom of the screen.

**Resolving Validation Errors and Checking Queries**

After creating the return file and validating the data, any errors and queries found are listed in the **Validation Errors Summary** panel at the bottom of the **Census Return Details** page.

The number of errors and queries found during the Create and Validate process is displayed in the header of the **Validation Errors Summary** panel. Details about each of the errors and queries found are displayed in the columns as described in the following table.
<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
</table>
| Type     | Displays the type of validation rule:  
Failure (F displayed in red) indicates an error, which must be corrected.  
Query (Q displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary. |
| Sequence | Shows the error or query number.                                                                                                                                                                              |
| Message  | Displays the text of the error or query message.                                                                                                                                                             |
| Location | Lists the specific record containing the error or query.                                                                                                                                                      |
| Solution | Provides a suggestion on how the error can be corrected or the query checked. Many solutions have a hyperlink (indicated by a #) to the appropriate area of SIMS.                                               |

To assist in the resolution of any errors and queries:

- When the mouse pointer is hovered over an error or query row, it changes to a hand if a hyperlink is available to the area of SIMS where the issue can be checked.

![Image](https://via.placeholder.com/150)

**NOTE:** A hyperlink is also indicated by a hash symbol (#) preceding the Solution text.

Click the appropriate hyperlink to display the specific SIMS area where the record(s) can be checked or corrected.

- When the mouse pointer is hovered over a Message, Location or Solution cell, hover help displays the entire content of that cell.

- The Student Search functionality can be used to display all errors and queries relating to a particular pupil. Enter all or part of a UPN, pupil's surname or date of birth in the Student Search field then select the required record from the Student Search drop-down list and click the Find button.

![Image](https://via.placeholder.com/150)
Click a Solution hyperlink to display the area of SIMS where the associated issue can be checked and/or corrected. When you return to the Validation Errors Summary panel, the details of the applicable pupil are displayed in the Student Search field. Click the Find button to display all errors and queries relating to that pupil.

Use the Errors Search to display the required error or query you want to view. Select ALL, ERRORS, QUERIES or the required failure number from the drop-down list. The total number of rows that relate to the validation failure you have selected is displayed adjacent to the Error Search field.

By default, the errors are displayed at the top of the list when ALL is selected from the Errors Search drop-down list. The order of the items in the list can be changed by clicking the appropriate column heading, if required.

The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.

View a summary of validation failures, which is particularly useful if there are a large number of errors/queries, by clicking the Report button (located above the Validation Errors Summary panel). The report is displayed in your web browser, e.g. Windows® Internet Explorer®, from where it can be printed or be transferred to another application, if required (please see Transferring Report Data to a Spreadsheet on page 43). The report (Validation Errors Summary.HTML) is saved automatically in the Census Folder, which was specified previously in the Census Return for <season> <year> Term browser. The original report, which was generated when the Create & Validate button was clicked (e.g. <LACode><SchoolNumber> <SurveyType> <LACode><LL><Year> <SerialNumber>_ValidationErrorsSummary.HTML), is also stored in this folder.
For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

Resolve as many errors and check as many queries as possible then revalidate the return details. Continue to resolve failures and revalidate the return as many times as necessary.

**NOTE:** All errors must be resolved and all queries must be investigated.

If at any point you wish to hide the list of error and queries, click the Close button located at the top right-hand side of the Validation Errors Summary panel. The list is displayed again when the Create and Validate process is run.

Many of the errors generated can be fixed quickly using bulk update functionality (via Routines | Pupil | Bulk Update). For more information, please refer to the Managing Pupil/Students handbook.

In addition to the Validation Errors Summary, an Errors and Resolutions document containing a list of all errors/queries that can be generated is being produced. Explanations and information on how to resolve the errors or whether the queries can be ignored are also included. The document can help to identify the order in which errors should be corrected. For example, if a UPN is missing, several UPN related errors might be generated. Therefore, adding missing UPNs can remove several errors.

**More Information:**
Transferring Report Data to a Spreadsheet on page 43

### Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return. The reports can be produced as soon as the return has been created and validated.

Each detail report header displays the Security Message that was defined in the Census Return browser, the Report Criteria and the Total Pupils that are listed in the report.

Also shown at the top of the report is the School Name, the Fileset Number, the Filename, the Report Created date, and the XML Version.

The following reports are currently available:

#### On Roll Basic Details Report

Report Criteria: Pupils on-roll on census day.

This report provides the following information about pupils who are on-roll on census day: UPN, legal surname, legal forename, preferred surname, former surname, date of birth, gender, year taught in, date of admission, enrolment status, language, class type, part-time status, boarder status, hours at setting and funded hours.
Leavers Basic Details Report
Report Criteria: Pupils not on-roll on census day, that is:
- Leavers with attendance one term ago (06/04/2015 to 31/07/2015)
- Leavers with exclusions two terms ago (01/01/2015 to 05/04/2015).
This report provides the following information about pupils not on-roll on
census day (Leavers): UPN, former UPN, legal surname, legal forename,
middle names, former surname, date of birth, gender, date of admission, date
of leaving, language, part-time status, boarder status, attendance and
exclusions.

Exclusions Report
Report Criteria: On-roll pupils and leavers with exclusions two terms ago
(01/01/2015 to 05/04/2015). Not applicable to pupils who have exclusions
with appeal result of Reinstated or Not in the best interests of the child.
This report provides the following details about pupils who match the report
criteria: UPN, legal surname, legal forename, date of birth, gender, date of
admission, exclusion category, reason for exclusion, exclusion start date,
number of session excluded from, in care indicator, SEN provision and on-roll
status.

Attendance First Half of Summer Term Report
Report Criteria: Pupils with attendance from 06/04/2015 to 24/05/2015.
On-roll pupils and leavers (but not boarders) who were aged four to 15 at
31/08/2014.
This report displays the following information about pupils and their
attendance during the first half of the Summer 2015 term: UPN, legal
surname, legal forename, date-of-birth, gender, year taught in, sessions
possible, authorised absence sessions, unauthorised absence sessions and
on-roll status.
Totals are displayed at the bottom of the applicable columns.

Attendance Second Half of Summer Term Report
Report Criteria: Pupils with attendance one term ago (25/05/2015 to
31/07/2015). On-roll and leavers (but not boarders) who were aged four to 15
at 31/08/2014.
This report displays the following information about pupils and their
attendance during the second half of the Summer 2015 term: UPN, legal
name, legal forename, date-of-birth, gender, year taught in, sessions
possible, authorised absence sessions, unauthorised absence sessions, on-roll
status.
Totals are displayed at the bottom of the applicable columns.
Absentees Report

Report Criteria: Pupils who have missed 14 sessions and whose absence might need to be tracked. On-roll pupils and leavers (not boarders) with attendance one term ago (06/04/2015 to 24/05/2015) who were aged four to 15 at 31/08/2014.

The second half of the summer term is not considered.

The number of sessions possible and the number of authorised plus unauthorised absences applicable to each of the pupils are shown on this report.

The report also shows basic details, i.e. UPN, legal surname, legal forename, date of birth, gender, year taught in, on-roll status and enrolment status, about the pupils who match the report criteria.

SEN Report

Report Criteria: Pupils with SEN Provision/Status = A (School Action or Early Years Action), P (School Action Plus or Early Years Action Plus) and S (Statement), E (Education), Health and Care Plan, K (SEN Support).

This report provides a list of pupils who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth, gender, year taught in, SEN Provision and on-roll status.

Address Details Report

Report Criteria: Pupils on-roll on census day.

This report provides a list of pupils, their UPN, former UPN (if applicable), legal surname, legal forename, middle name(s), address and the administrative area/county.

School Dinner Taken Report

Report Criteria: Pupils on-roll on census day, who have taken school dinner on the reference date.

- Pupils in Year Taught In R, 1 and 2.
- Pupils in year Taught In X who are aged four to six and who were born between 01/09/2008 and 31/08/2011 inclusive (Special schools only).

This report provides the following information about pupils who match the report criteria: UPN, legal surname, legal forename, date of birth, gender, year taught in and school dinner taken.
Free School Meal Eligibility Report

Report Criteria: On-roll pupils on census day who were eligible for free school meals on or after 22/01/2015 and up to and including census day (01/10/2015).

This report provides information on free school meal eligibility for pupils who match the report criteria: UPN, legal surname, legal forename, date of birth, gender, Year Taught In, on-roll status and free school meal eligibility start date, end date and the UK country in which the eligibility applies.

NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.
Only Free School Meals records where the Country recorded is England or <blank> attract the Pupil Premium.

Top-up Funding Report

Report Criteria: On-roll pupils who have been awarded Top-up Funding as at census day.

The following information is displayed on the report: UPN, legal surname, legal forename, date of birth, gender, year taught in and SEN provision.

Adopted from Care Report

Report Criteria: On-roll pupils who have been adopted from care as at census day.

The report displays the following information about pupils who have been adopted from care: UPN, legal surname, legal forename, date of birth, gender, year taught in and adopted from care status, e.g. ceased to be looked after through a residence order (RO).

Generating Detail Reports

To select a single detail report, select the required report from the Detail Report drop-down list located at the top of the Census Return Details page. The selected report is generated automatically and displayed in your web browser, e.g. Windows® Internet Explorer®.
To run several detail reports, select **Multiple Reports...** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog.

By default, all detail reports are selected. If any reports are not required, deselect the associated check box. Click the **Report** button to generate the selected reports, which are displayed in your web browser from where the data can be transferred to a spreadsheet such as Microsoft® Excel if required.

The report(s) are saved automatically in the **School Census Folder**, which was specified in the **Census Return** browser, e.g. `S:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a **Hosted** environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that is made up of the following data fields separated by underscores (`_`):

- `<LACode>`
- `<SchoolNumber>`
- `<SurveyType>`
- `<LACode>`
- `<LL>`
- `<Year>`
- `<SerialNumber>`
- `_<name of the report>_Report.html`

For example: `8232999_SC3_823LL15_001_onroll_pupil_basic_details_report.html`.

Example of an **On Roll Basic Details** report:
Printing a Report from your Web Browser

**IMPORTANT NOTE:** Any printed reports containing information that could identify a person (e.g. their name, address, UPN, etc.) should be used for validation purposes only and should not be retained. The Security Message (displayed at the top of each report) can be customised to include instructions for the destruction of the printed reports, if required.

1. With the generated report displayed in your web browser, select **File | Print** to display the **Print** dialog.
2. Ensure that the print settings are correct then click the **Print** button.
3. Click the **Close** button on the top right-hand corner of the web page to close the report and return to the census page.

Transferring Report Data to a Spreadsheet

Transferring a report to a spreadsheet application enables the data to be sorted, the column order to be changed, etc.

In your web browser, right-click the report then select the required option, e.g. **Export to Microsoft Excel**, from the drop-down list.

The spreadsheet contains the same level of sensitive information as the original HTML report from which it was transferred therefore, it is important that the file is saved to a folder with the same level of security.

Deleting Temporary Web Browser Files

It is recommended that, after viewing statutory returns reports, you delete any temporary web browser files to ensure that any cached data (i.e. data stored on the PC itself, which enables high-speed access to previously viewed data) is removed.

This prevents the information, e.g. copies of web pages that are stored in the local cache for faster viewing, remaining on the hard disk of the PC in the temporary directory, where they are not secure because they can still be accessed.

Deleting the cache in Windows Internet Explorer 10

1. Select **Tools | Internet options** to display the **Internet Options** dialog.
2. Select the **General** tab.
3. In the **Browsing history** section, click the **Delete...** button to display the **Delete Browsing History** dialog.
4. Ensure that the **Temporary Internet Files and website files** check box is selected then click the **Delete** button.
   
   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
5. Click the **OK** button.
Deleting the cache in Windows Internet Explorer 8 and 9

1. Click the **Tools** button located on the far right-hand side of the toolbar.
2. Select **Internet options** from the drop-down list to display the **Internet Options** dialog.
3. Select the **General** tab.
4. In the **Browsing history** section, click the **Delete...** button to display the **Delete Browsing History** dialog.
5. Ensure that the **Temporary Internet Files** check box is selected then click the **Delete** button.
   All temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.
6. Click the **OK** button.

Producing the Summary Report

The Summary report enables the accuracy and completeness of the return to be assessed by the school staff involved in preparing the return. It can also be used to assist the Head Teacher in the checking of data before authorising the return.

**NOTE:** When the return is authorised, the Summary report is automatically generated and displayed in your web browser, e.g. Windows® Internet Explorer.

Generating the Summary Report

Click the **Summary** button located at the top of the **Census Return Details** page. The report is automatically displayed in your web browser, e.g. Windows® Internet Explorer®, but can be transferred to a spreadsheet such as Microsoft® Excel if required.

The report is saved automatically in the **Census Folder**, which was specified in the **Census Return browser**, e.g. $\text{S:}\text{SCHOOL CENSUS}$. For guidance on navigating to files on your local workstation when you are working in a **Hosted** environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that is made up of the following data fields separated by underscores (‘_’):

\[
<\text{LACode}><\text{SchoolNumber}>_<\text{SurveyType}>_<\text{LACode}><\text{LL}><\text{Year}>_<\text{SerialNumber}>_<\text{name of the report}>_Report.html
\]

For example: 8232999_SC3_823LL15_001_Summary_Report.html.

It is important that the Head Teacher checks all the information on the Summary report before the return is authorised. Your LA/DFE might request that a copy of the Summary report (which is automatically generated when the return is authorised) is signed by the Head Teacher and sent to the LA/DFE when the return has been authorised.

**More Information:**
- Generating Detail Reports on page 41
- Configuring the Census Folder on page 10
- Transferring Report Data to a Spreadsheet on page 43
- Deleting an Unauthorised Return on page 49
Editing an Unauthorised Return

The return details, e.g. Description, School Information, etc. can be edited via the Census Return Details page at any time prior to authorisation.

**IMPORTANT NOTE:** An authorised return cannot be edited. If changes are required to an authorised return, use the Copy facility to produce a duplicate return (with a unique description) in which the changes can be made.

1. Select Routines | Statutory Returns | <census name> to display the browser.
2. Ensure that the Census Folder and the Security message for Reports are correct then click the Search button to display any previously created returns. Unauthorised returns can be recognised by their .UNA suffix.
3. Double-click the required return. Alternatively, highlight the required return then click the Open button to display the Census Return Details page.
4. Edit the return details as required.
5. Click the Create & Validate button to display the Validation Errors Summary panel.
6. Resolve any errors and check any queries before running the Summary report and detail reports to ensure that the information is correct.
7. Repeat the editing process again, if necessary.
8. Click the Save button.

**More Information:**
- Configuring the Census Folder on page 10
- Specifying the Security Message for Reports on page 11
- Resolving Validation Errors and Checking Queries on page 35
- Producing Detail Reports on page 38
- Producing the Summary Report on page 44

Authorising the Return

A return must be authorised before it can be submitted to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school).

Before authorising the return, you should ensure that all the information displayed on the Census Return Details page is correct and does not require further editing. This is best achieved by reviewing the Summary report.

1. Click the Authorise button.
If missing marks exist, the following message is displayed.
2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered. If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.

![Image of a message box saying Return cannot be edited once authorised.]

3. Click the **Yes** button to continue or the **No** button to return to SIMS where edits can be made to the data before authorising. If you choose to continue, the **Head teacher authorisation** dialog is displayed.

![Image of the head teacher authorisation dialog]

4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.

5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.

   When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
6. Click the **Continue** button to authorise the return.
   - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.
   - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).
   - All details, i.e. the reports and the XML file, are saved in the **Census Folder**, which was specified previously in the **Census Return for <season> <year> Term** browser.

All reports can be viewed via **Tools | Statutory Return Tools | Retrieve Authorised Census Return Files**. This routine also provides the opportunity to download the files to a different folder.

**IMPORTANT NOTE:** Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.

For guidance on navigating to files on your local workstation when you are working in a **Hosted** environment, please contact your System Manager or Local Support Unit.

When a return has been authorised, it is no longer possible to edit the details displayed on the **Census Return Details** page. If you authorise a return and subsequently need to make amendments, you should either make a copy of the return and work on the copy, or create a new return.

**More Information:**
- **Producing the Summary Report** on page 44
- **Copying a Return** on page 48

**Submitting the Return**

When the return has been completed and the Summary report has been signed by the Head Teacher (if requested to do so by your LA), the .XML file can be uploaded to the DfE COLLECT data collection website or sent to your LA, depending on the instructions you have been given.

The authorised return file is located in the folder previously specified in the return browser. For guidance on navigating to files on your local workstation when you are working in a **Hosted** environment, please contact your System Manager or Local Support Unit.

**IMPORTANT NOTE:** An authorised file cannot be edited. If you need to make changes to an authorised file, you must make a copy of the original file, rename it and work on the copy.

**More Information:**
- **Configuring the Census Folder** on page 10
- **Copying a Return** on page 48
Retrieving Authorised Census Return Files

Authorised returns are stored in your Document Management Server (DMS). The Returns Manager can download and run the reports associated with previous authorised returns enabling the data for the current return to be compared with that submitted previously.

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Census Return Files for <census name>** page.

2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.

3. By default, the files **Download to** the folder specified in the census browser. To specify a different folder:
   a. Click the **Select a Folder** button (…) to display a standard Windows® **Browse For Folder** dialog.
   b. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable name for the new folder.

   **IMPORTANT NOTE:** Ensure that authorised personnel only have access to the download folder because the retrieved files contain sensitive information.

   For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or local Support.

   c. Click the **OK** button to select or create the folder then return to the **Retrieve Authorised Return Files for <census name>** page where the chosen folder name is displayed in the **Download to** field.

4. Highlight the return you wish to retrieve then click the **Retrieve Files** button. The authorised return file (i.e. the XML file) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required files in your web browser.

5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

Copying a Return

An unauthorised return can be copied and saved as a new return. This enables a ‘snapshot’ of a return to be taken at any time providing a backup of any manual changes that have been made to the return, for example before recalculating details.

This functionality can also be used to make a copy of an authorised return if the LA or DfE requires it to be resubmitted. The necessary corrections can then be made to the data. The copied return must be saved, created, validated and authorised before resubmitting.

**NOTE:** Ensure that the return you wish to replicate is not open at the time of copying.
6. Select **Routines | Statutory Returns | [name of census]** to display the census browser.

7. Click the **Search** button to ensure that the list of returns is displayed.

8. Highlight the file you wish to copy then click the **Copy** button. A message requests confirmation that you wish to make a copy of the selected return.

   **IMPORTANT NOTE:** Any values for attendance (where applicable), Hours for Early Years, Adopted from Care and Top-up Funding will not be copied but will be populated from the current values held in the database. *The Create & Validate routine must be run in order to generate a new census file.*

9. Click the **Yes** button to make the copy, which is then displayed in the browser as: **Copy of [description of selected file].**

10. To rename the copied return, highlight it then click the **Open** button to display the **Return Details** page.

11. In the **Census Details** panel, edit the **Description** then click the **Save** button.

   **IMPORTANT NOTE:** The new **Description** must be unique for this return. SIMS will not save the data if a duplicate return description is found.

**Deleting an Unauthorised Return**

During the return process, a number of copies of the return may be created, e.g. to track progress. When the return has been authorised successfully, it is advisable to delete any versions of the return that are no longer required. This keeps the number of files in the storage folder and listed in the browser to a minimum, therefore removing confusion and lessening the risk of selecting the wrong return.

The delete routine can be used to remove unwanted returns at any time prior to the relevant return being authorised.

   **IMPORTANT NOTES:** When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted. Any return files that have already been authorised cannot be deleted.

1. Select **Routines | Statutory Returns | [Return name]** to display the browser.

2. Click the **Search** button to ensure that the list of return files is displayed.

3. Highlight the return file to be deleted then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.

4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

   The deleted return file is removed from the browser and the storage folder, along with any associated reports.
Index

A
access rights ........................................ 5
address details report ......................... 40
adopted from care .......................... 23, 41
attendance information
  compliant codes .......................... 29
  non-compliant codes .................. 30
school dinner taken on census day . 25, 28
SIMS Attendance not in use .......... 28, 31
authorising ......................................... 45
  retrieving previous authorised census
    returns ....................................... 48
  school census .................................. 45
C
calculating all details ....................... 12
census details
  checking dates ............................... 12
  editing description ........................ 12
class types
  updating ......................................... 17
configuring
  school census defaults ..................... 10
copying
  school census return ........................ 48
creating
  a new return .................................. 9
  and validating the return ................. 33
creating & validating ......................... 33
D
data collected
  school level ............................... 6
  pupil level ................................. 6
default folder
  defining ...................................... 11
deleting
  school census return ...................... 49
temporary web browser files ............. 43
description
  editing ........................................ 12
detail reports
  generating ..................................... 41
  producing ...................................... 38
  transferring to a spreadsheet ........... 43
DfE compliant codes ......................... 29
DfE non-compliant codes ..................... 30
dinner money
  school dinner taken on census day . 25, 27
E
editing
  an unauthorised return ........................ 45
  census description .......................... 12
  school details ................................ 13
entering
  attendance information ..................... 29
errors and queries (validation)
  resolving ...................................... 35
F
free school meals
  eligibility report ............................. 41
funded hours
  no hours recorded ......................... 17
  updating ....................................... 14
H
hours at setting
  no hours recorded ........................... 17
  updating ....................................... 14
L
leavers basic details report ............ 39
loading
  school census files .......................... 33
N
new return
  starting ........................................ 9
Index

O
on-roll basic details report ...................... 38

P
permissions ............................................. 5
preparation
  checking data........................................ 6
  minimum version of SIMS ....................... 6
  permissions ....................................... 5
previous authorised census returns........ 48
printing
  reports ............................................. 43, 48
  validation errors summary ..................... 35
producing
  the return ........................................... 9
pupil reconciliation
  universal infant school meal ............... 25

Q
queries and errors (validation)
  resolving ............................................ 35

R
reporting
  deleting temporary web browser files .. 43
  producing detail reports .................... 38
  generating detail reports .................. 41
  reports
    absentees report......................... 40
    address details report ................. 40
    adopted from care report ............ 41
    attendance report ...................... 39
    exclusions report ....................... 39
    free school meal eligibility report... 41
    leavers basic details report ........ 39
    on-roll basic details report ........ 38
    school dinner taken report .......... 40
    SEN report ........................................ 40
    top-up funding report .................. 41
  specifying security message ............... 11
resolving
  errors and queries ............................ 35
retrieving
  authorised census return files .......... 48
return
  creating........................................... 9

S
school census return
  authorising....................................... 45
  configuring the storage folder .......... 10
  copying ........................................... 48
  create & validate ............................ 33
  creating a new return ..................... 9
  deleting ........................................... 49
  submitting ....................................... 47
school dinner taken on census day ......... 25
school information
  checking ........................................... 6, 13
security
  deleting temporary files ...................... 43
  specifying security message ............... 11
SEN report........................................... 40
SIMS
  version required to create return ........ 6
steps to producing the return
  flowchart ........................................... 3
submitting the return ........................... 47
summary report
  printing ........................................... 43
  producing ........................................ 44

T
temporary web browser files
  deleting ........................................... 43
top-up funding .................................. 20, 41
transferring
  report data to a spreadsheet ............ 43
  submitting the return ....................... 47

U
unauthorised return
  copying ........................................... 48
  deleting ........................................... 49
  editing ............................................ 45
  updating
adopted from care ............................ 23
class types..................................... 17
hours for early years children .......... 14
top-up funding ............................... 20
uploading the return ......................... 47

V
validating school census ................. 33
validation failures
  resolving ................................... 35