SIMS

Managing Pupil/Students

applicable to 7.190 onwards

Handbook

Revision History

Version	Change Description	Date
7.190 - 1.0	Initial release.	01/10/2019

Capita Doc Ref: Student7190/HBK/011019/FT

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:

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

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01 | Getting Started

Maintaining Pupil/Student Data

This handbook provides information on the main processes that relate to the management of pupil/student data in SIMS, from admission through to leaving. It also covers some of the typical day-to-day processes that are carried out in SIMS.

This handbook assumes that various defaults and setups have been previously carried out. Where necessary, references are made to the *Setting Up and Administering SIMS* handbook, which describes how to set up SIMS for the functions outlined in this handbook.

What's New in this Release?

Changes to Buttons and Icons on the SIMS Toolbar and in the Menu System

Some of the icons on the main SIMS toolbar and in the menu system have been updated. We will endeavour to update our range of user documentation in line with these changes in due course.

Enhancements to the Modify Pupil/Student Address Routine

Focus | Pupil (or **Student**) **| Pupil** (or **Student**) **Details**

The **Additional persons at this address** table has been removed from the **Addresses** panel on the pupil/student record. Any parents, applicants, staff or other contacts who share the same address as the pupil/student are now displayed in the **Linked People** dialog, which is accessed via the **Modify Address** button.

A confirmation message is now displayed when changing the pupil/student's current address, advising that all other people registered at this address will be affected by the change.

For any changes to persons linked to the pupil/student's address to be visible, the pupil/student record must be re-opened.

More Information:
Modifying a Pupil/Student's Address on page *192*

Enhancement to the Communication Log

Focus | Pupil (or **Student**) **| Pupil** (or **Student**) **Details**

When viewing information in a pupil/student's communication log, a separate window is now displayed for each communication.

More Information:
Adding a Communication on page *306*

Permissions

You will need to be a member of one or more of the following System Manager user groups to ensure you have the permissions required to use the functionality outlined in this handbook.

- Administration Assistant
- Admissions Officer
- Assessment Coordinator
- Assessment Operator
- Attendance Manager
- Attendance Operator
- Class Teacher
- Curricular Manager
- Pastoral Manager
- Registration Tutor
- Returns Manager
- Returns Operator
- School Administrator
- SEN Co-ordinator
- Senior Management Team
- Teaching Assistant

Please contact your System Administrator if you are unsure whether you have the applicable permissions.

Additional Resources:

Managing SIMS Users, Groups and Databases handbook

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category, then click the required handbook from the **Handbooks** page.

For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet. Copies can be obtained via the SIMS **Documentation Centre** and from My Account (https://myaccount.capita-cs.co.uk). On My Account, search for `<sims version> sims permissions spreadsheet`, e.g. `7.190 sims permissions spreadsheet`.

Recording People in SIMS

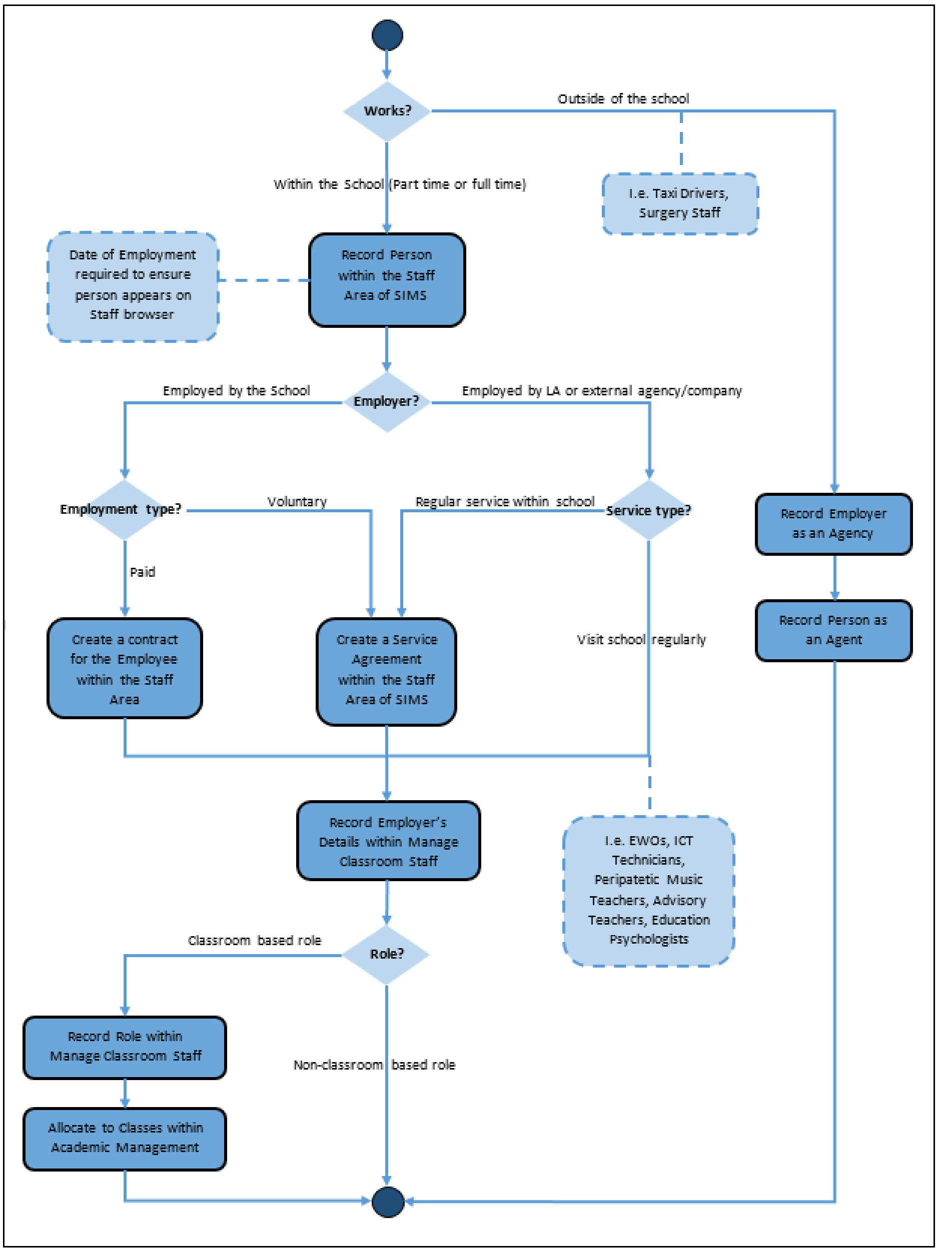
When adding a new person into SIMS, it is advisable to consider the type of role, function or data responsibilities that they will be required to undertake in the school before entering their details. These considerations will help you to determine which area of SIMS the person 'belongs' to, e.g. as a staff member, a pupil/student's contact, an agent for an external agency, etc.

The following table details the four main 'people' areas in SIMS:

Term	Definition	Menu Route
Employee	A person who has a contract of employment paid by the school, e.g. dinner lady, groundsman, etc. They are employed by the school and are included in the School Workforce Return.	**Focus | Person | Staff**
Staff	A person who has a contract of employment paid by the school. In SIMS, they are generally teachers, LSA's and TA's and are included in the School Workforce Return.	**Focus | Person | Staff** or **Manage Classroom Staff**
Agent	An individual who works for a recognised, external agency and who may have some involvement with a pupil/student, e.g. as a doctor, speech therapist, etc. They are not paid by the school and are not included in the School Workforce Return.	**Focus | Person | Agents**
Contact	Often a family member or a close friend of the pupil/student's family who can be contacted in the case of an emergency. They may also be former pupil/students or employees whose children attend the school in which they work. They are not paid by the school and are not included in the School Workforce Return.	**Focus | Person | Contacts**

Where an element of doubt or uncertainty exists, individuals who work within the school but are not employed by the school should be recorded as Agents in SIMS.

Please see the following flow chart for additional information.



Works?
Outside of the school
Within the School (Part time or full time)
I.e. Taxi Drivers, Surgery Staff
Date of Employment required to ensure person appears on Staff browser
Record Person within the Staff Area of SIMS
Employed by the School
Employer?
Employed by LA or external agency/company
Employment type?
Voluntary
Regular service within school
Service type?
Record Employer as an Agency
Paid
Record Person as an Agent
Create a contract for the Employee within the Staff Area
Create a Service Agreement within the Staff Area of SIMS
Visit school regularly
Record Employer's Details within Manage Classroom Staff
I.e. EWOs, ICT Technicians, Peripatetic Music Teachers, Advisory Teachers, Education Psychologists
Classroom based role
Role?
Record Role within Manage Classroom Staff
Non-classroom based role
Allocate to Classes within Academic Management

02| Using the SIMS Home Page

Introduction

The SIMS **Home Page** provides an overview of the key and relevant content stored in SIMS relating to the currently logged in SIMS user. The information available to display includes events from the School Diary, reminders and messages. It is also possible to display attendance, assessment and pupil/student conduct summaries, tailored to the lessons for which you are the main class teacher.

The SIMS **Home Page** is displayed automatically each time you log into SIMS. If you close the screen, it can be re-opened by selecting **Focus | Home Page**.

When you first log into SIMS, a default set of panels will be displayed on your SIMS **Home Page**. The panels displayed are determined by your System Manager/Administrator and by the default Home Page group(s) to which you have assigned. However, many of the panels on the SIMS **Home Page** can be configured to display information relevant to you and your role. The display order of the panels can be changed and the text on each panel can be also be amended to reflect your requirements.

When SIMS is upgraded, all of your personalised settings are retained. Any changes you make to the layout and display of the SIMS **Home Page** affect the display of your Home Page only; these changes are not reflected on the Home Page of other SIMS users.

Searching for People using the Home Page

The SIMS **Home Page** enables you to search for and select a person recorded in SIMS (i.e. a pupil/student, member of staff, contact, applicant or agent) to display their full record.

IMPORTANT NOTE: *The functionality available to view personal details depends on the permissions assigned to you in SIMS System Manager.*

*TIP: The Quick Search functionality can be accessed by pressing **CTRL + Q** anywhere in SIMS. This returns you to the SIMS **Home Page**, from where you can carry out a search.*

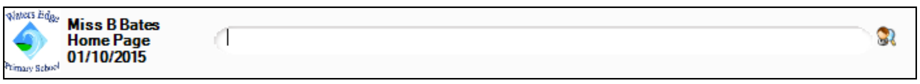
This functionality enables you to search for a person using any of the following criteria:

- Person's name

  NOTE: Initially, surnames, legal surnames, forenames and chosen names are interrogated. If no results are found, SIMS searches through middle names. If results are still not found, SIMS attempts to match on words that sound like the search criteria entered.

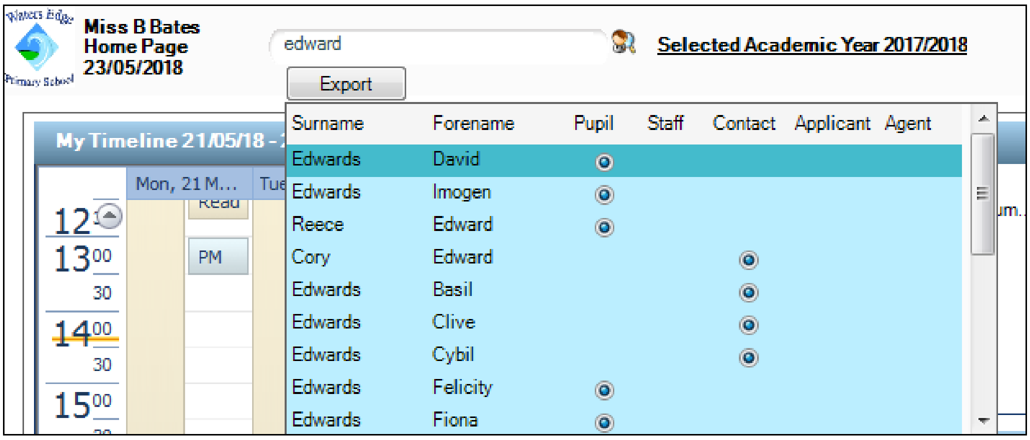
- Admission number
- Candidate number
- Telephone number
- Address
- Email address
- UPN
- UCI
- Vehicle

From the SIMS **Home Page**, enter the required search criteria (at least two characters) in the **Quick Search** field at the top of the page. The search bar is not case sensitive, so entering `Jones` would reveal the same results as `jones` or `JONES`.



Click the **Search** button to display a list of people recorded in SIMS who match the search criteria entered.

Search button



NOTE: If you enter a single character or enter `help` *then click the **Search** button, a list of filter options is displayed for guidance (please see* Applying Filters for the Quick Search *on page* 9*).*

Current pupil/students are displayed at the top of the search results, followed by current staff and then anyone else (current contacts, current applicants, pupil/student leavers, etc.). The search results are further arranged alphabetically by surname then forename within each of these groups of people.

The adjacent radio button indicates the type of person as they are recorded in SIMS, e.g. **Student**, **Staff**, **Contact**, etc.

Click the **Export** button to export the search results to Microsoft® Excel, if required.

To assist in the identification of the required person, particularly where more than one occurrence of a name exists in SIMS, hovering over a radio button provides additional information. For example, hovering over the **Student** radio button shows the pupil/student's **Reg Group** and **Year Group** and hovering over the **Contact** radio button shows all of their **Associated Students**. If the person is a pupil/student or member of staff, the hover help will display their current timetable location. In the following example, the pupil/student is not timetabled at this time.


Edwards, Imogen [PINE]
Gender: F
DOB: 23/02/2007
Latest DOA: 01/09/2011
Latest Reg: PINE
AdNo: 001245
UPN: Y823200110091
Home Address: 7, Alexandre Avenue, North Hykeham, Lincoln, LN6 8NR
Home Email: Edwards@bt.com
Main phone: (H) 01632 213456
Attendance AM: # PM: #
Main contact: Edwards, Mr Basil Main phone: (H) 01632 213456
Not timetabled at 08:48

To learn the whereabouts of a person (at a time in the past or present), enter their name, date (optional) and time. For example, entering `Ben Abbot 10:30` and pressing **Enter** displays all people recorded in SIMS named Ben Abbot. If the person is a pupil/student or member of staff, hovering over their name in the search results displays their timetable location as of 10:30 today. Entering `Ben Abbot 27/06/2018 10:30` and pressing **Enter** displays their timetable location as of that date and time.

If the search returns more than 120 possible matches, the content of the hover help is reduced to enhance the performance of the search functionality.

> ***IMPORTANT NOTES:*** *The **Contacts** column will be hidden if you have only View permissions for contacts. Contacts recorded in SIMS solely as a next of kin will be displayed in the search results only if you have View permissions for next of kin.*

Once you have identified the required person, double-click their name to display their full record in the appropriate area in SIMS, from where the information can be edited.

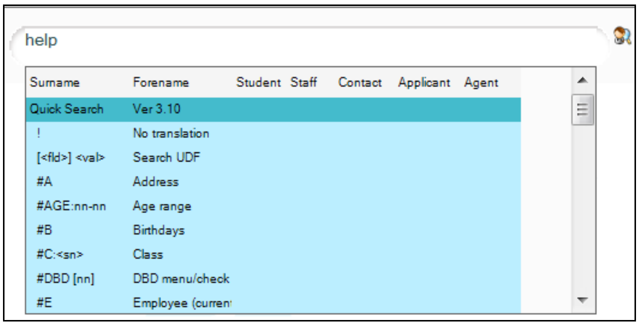
Person Type	Page Opened
Student	**Pupil** (or **Student**) **Details** page (also accessible via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**) or **Pupil** (or **Student**) **Teacher View** page (also accessible via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Teacher View**) The page opened is governed by the option selected on the **Pupil** (or **Student**) **Teacher View Setup** page (accessed via **Tools | Setups | Pupil** (or **Student**) **Teacher View**)
Staff	**Employee Details** page (also accessible via **Focus | Person | Staff**)
Contact	**Contact details** page (also accessible via **Focus | Person | Contacts**)
Applicant	**Application** page (also accessible via **Focus | Admission | Application**)
Agent	**Agent Details** page (also accessible via **Focus | Person | Agents**)

Applying Filters for the Quick Search

The Quick Search functionality enables you to enter filters, which can be used to further refine the results of a search, e.g. to display all females with a name containing Smith.

These search filters, which start with the # symbol, are used to filter name searches. You can use as many of the following filters in a search as required. Additional search filters can be used on other data items.

> *TIP: If you enter a single character or enter `help` then click the **Search** button, a list of filter options is displayed for guidance.*



Token	Description
#B	Searches for birthdays of current pupil/students today, tomorrow or the next day, with an indicator of their age on that birthday (if they will be under 21 years of age).
#BP	Searches for bill payers only.
#C:<sn/desc>	Searches for student members of the timetable class with short name or description. Entering `#C:7a/Mu1 #M` displays all males currently in class 7a/Mu1. Entering `#H:flemming #C:7a/Mu1` displays anyone in Flemming house who is also in class 7a/Mu1. Entering `#C:Mu` displays anyone currently belonging to a music class.
#D	Searches for non-confidential School Diary events. Entering `#D` finds non-confidential events within 14 days of the effective date. Entering `#D /30` finds non-confidential events within 30 days of the effective date. Entering `#D inset /60` finds non-confidential events containing the word 'inset' within 60 days of the effective date.

Token	Description
#E	Searches for current employees. Entering `#E d%y` displays current employees with a name containing d followed by y. To indicate a precise number of intermediate letters, you should use a question mark for each one. Entering `#E a??n #F` displays all female current employees with a name containing the letters a and n with two more letters between them.
#ENQ	Searches for enquirers only.
#F	Searches for females only. Entering `#F jones` (or `jones #F`) displays all females with a name containing jones. Entering `#F jones k` (or `jones k #F`) displays all females with a name containing jones k.
#H:<sn/desc>	Searches for pupil/student members of a house with the given short name or description. Entering `#H:Darwin #M smith` displays all males with a name containing smith in Darwin house. Entering `#H:Darwin #M smith 18/05/2018` displays all males with names containing smith who were in Darwin house on the given date.
#M	Searches for males only. Entering `#F jones` (or `jones #F`) displays all males with a name containing jones. Entering `#F jones k` (or `jones k #F`) displays all males with a name containing jones k.
#R:<sn/desc>	Searches for pupil/student members of a registration group with the given short name or description. Entering `#R:5D susan` displays anyone called Susan (or with a name containing susan) in the registration group 5D. Entering `#R:5D #M` displays all the males in 5D. Entering `#R:5D` displays everyone in 5D. Entering `#r:9e #m p` displays all the males in registration group 9E with a name containing the letter P.
#S	Current pupil/students. Entering `#S wilkinson` displays all current pupil/students called wilkinson. Entering `#S` displays all current pupil/students.
#XS	Searches for ex-pupil/students only.

Token	Description
#XE	Searches for ex-employees only.
#Z	Searches for anyone who has both a pupil/student and an employee record. Do not use this filter in conjunction with any other filter.
#Y:<sn/desc>	Searches for student members of a year group with the given short name or description. Entering `higgins #Y:7` displays anyone in Year 7 called higgins. Entering `#Y:8 #H:newton` displays all current year 8 students in Newton house. Entering `#Y:6 #H:newton #F J` displays girls in year 6 and Newton house called J (i.e. having a name containing J).

More Information:
Applying Filters for Birthdays on page *11*
Applying Filters for Vehicles on page *12*
Applying Filters for Addresses and Email Addresses on page *12*
Applying Filters for Telephone Numbers on page *13*
Using Wildcard Characters on page *17*

Applying Filters for Birthdays

The Quick Search functionality enables you to obtain a list of pupil/students with a birthday today, tomorrow or the next day. The information displayed includes the day on which the birthday falls, together with how old they are (if they are under 21 years of age).

Entering `#B` displays pupil/students with birthdays today, tomorrow or the next day.

Entering `#B #S` displays current pupil/students with birthdays today, tomorrow or the next day.

Entering `#B 12/12/2018` displays pupil/students with birthdays between 12 December and 14 December 2018.

Entering `#B #H:newton` displays pupil/students in Newton house with birthdays today, tomorrow or the next day.

Entering `#B #S #H:newton 12/12/2018` displays current pupil/students in Newton house with birthdays between 12 December and 14 December 2018.

Applying Filters for Age

It is possible to restrict the search results to pupil/students within a specific age range, up to 19 years of age.

Enter `#AGE:16` to display a list of pupil/students who are aged 16.

Enter `#AGE:6-12` to display a list of pupil/students who fall within the age range of 6-12.

Enter `#DOB 22/12/2005` to display a list of pupil/students with that specific date of birth. Substitute any of the digits with an `x` to locate pupil/students whose birthdays fall on a date with some unknown elements, e.g. `#DOB xx/12/2005`.

Applying Filters for Vehicles

The Quick Search functionality enables you to search for a person based on their vehicle. It is possible to search on the colour, model or registration number of the vehicle. If you enter more than one vehicle search filter, all of these values must match to obtain a result.

> *NOTE: Any single letters included in the search are checked against the vehicle registration numbers only.*

Entering `#V E` displays vehicles with a registration number containing the letter E.

Entering `#V BMW` displays vehicles with a registration number containing the letters BMW or where the model is a BMW.

Entering `#V E RED` displays vehicles with a registration number containing the letter E and where the colour is red.

Entering `#V E RED BMW` displays vehicles with a registration number containing the letter E, where the colour is red and the model is BMW.

Applying Filters for Addresses and Email Addresses

The Quick Search functionality enables you to search for a person based on their postal or email address.

> *NOTE: If you enter multiple address filters, they must be entered in the order they are displayed in the address. For example, 47 Church Lane rather than Church Lane 47 (where 47 is the house number).*

Entering `#A 47` displays people whose address contains, for example, 47, 147, 471, etc. as a house number or as part of a post code.

Entering `#A 47 Church` displays people whose address contains 47 (as the house number only) and later the word Church in the address.

Entering `#A 47 Church Lane` displays people whose address contains 47 (as the house number only), then the word Church then the word Lane in the address.

Entering `#A 47 Church Lane 47` displays people whose address contains 47 (as the house number only), then the word Church, then the word Lane in the address and 47 as part of the post code.

Entering `john #A Lane` displays people whose name contains John and whose address contains the word Lane.

> *NOTE: If you want to search on a person's name and part of their address, the name filter must be entered before the #A filter.*

Applying Filters for Telephone Numbers

The Quick Search functionality enables you to obtain a list of people based on all or part of a recorded telephone number. This filter ignores any spaces or hyphens that have been recorded as part of the telephone number.

Entering `#T 6864` displays people whose telephone number contains the digits 6864 consecutively, e.g. 01234 686400, 01268 640000, 01268640000, 01268-640000, etc.

> *NOTE: Although the search is carried out on all recorded telephone numbers, the hover help displays only information on the main telephone number.*

Applying Filters for Students or Staff Records with Incomplete or Conflicting Data

It is possible to use the Quick Search functionality to identify incomplete pupil/student and staff data, as well as to isolate records that contain conflicting information.

These search filters, which start with the ~ symbol, can be used to search for the following types of data.

Token	Description
~A	Current pupil/students (not Guests) with no recorded admission number.
~B	Current pupil/students or employees with no recorded date of birth.
~C	Current pupil/students with no recorded current curriculum year.
~D	Current pupil/students over the age of 14 with no recorded candidate number.
~E	Current pupil/students with no recorded ethnic code or category.
~F	Current pupil/students with no recorded first language.
~G1	Current staff, pupil/students or contacts with no recorded gender.
~G2	People with a title that conflicts with their recorded gender, e.g. males with the title of Mrs or females with the title of Mr, etc.
~G3	Contacts with a relationship type that conflicts with their gender, e.g. female step-fathers or male mothers, etc.
~H	Current pupil/students or employees with no recorded current home address.
~I	Current pupil/students aged over 14 with no recorded UCI.
~L	Current pupil/students with no recorded home language.
~M	Current pupil/students with no recorded current meal type.

Token	Description
~O	Current pupil/students with no recorded contacts.
~R	Current pupil/students with no recorded current registration group.
~T	Current pupil/students or applicants with titles, or employees without titles.
~U	Current pupil/students with no recorded UPN, or (in India only) with no UID.
~V	Current pupil/students with no recorded current travel mode.
~X	Current pupil/students with no recorded Local UPN.
~Y	Current pupil/students with no recorded current year group.
~Z	Current pupil/students with no recorded Fees Reference.

The term 'current' is relevant only if you have not included a date in the **Quick Search** field.

It is possible to combine searches by including more than one letter, e.g. `~BU` enables you to search for a missing date of birth and a missing UPN. However, you cannot mix a `~` search with a `#` search. It is not possible to mix different types of search, e.g. you cannot enter `~B fred`, expecting to display a list of pupil/students called Fred and who have no recorded date of birth.

Including Linked People in the Search

To display people who are linked to those in your initial search, enter `#LNK` in the **Quick Search** field. The following associations are displayed:

- employee/next of kin
- employee/other staff contacts
- pupil/student or applicant/family or agent contacts
- contacts of pupil/student or applicant with parental responsibility/another contact with parental responsibility for the same pupil/student.

For example, entering `Jack Robinson` finds pupil/students of this name. Entering `Jack Robinson #LNK` also locates their mother, father, aunt and doctor, etc.

> *NOTE: Care must be taken to ensure that the linked individual is associated with the specific pupil/student for whom you are searching.*

It is also possible to locate siblings of the pupil/student for whom you are searching by entering `#SIB` in the **Quick Search** field. In this instance, sibling is defined as any pupil/students who share a common relation who has parental responsibility for both children.

Checking for Duplicate Data Items

Entering > in the **Quick Search** field enables you to identify any of the following duplicate data items.

Search	Meaning
>EXNO	Finds people with an exam number that is not unique.
>ADNO	Finds people with an admission number that is not unique.
>UCI	Finds people with a UCI that is not unique.
>UPN	Finds people with a UPN that is not unique (not in India).
>ULN	Finds people with a ULN that is not unique.
>CREC	Finds people with more than one exam candidate record.
>HADR	Finds people with more than one current home address.
>UDI	Finds people with a UDI that is not unique (in India only).
>	Finds anyone with any of the above data issues.

Searching for Values in a User Defined Field

It is possible to search for a value specified in a user defined field by entering an excerpt from the description, e.g. `[Locker Number]`, in the **Quick Search** field. User defined fields are identified by the text enclosed within square brackets.

This displays a list of pupil/students or other people in the school who are associated with the user defined field.

Maintaining Shortcuts

Creating Shortcuts

It is possible to create shortcuts for items that you regularly search for using the Quick Search functionality.

Enter `+$` before entering the filter for the required value. Shortcuts created in this manner are visible only to you.

Enter `+$$` before entering the filter for the required value. These shortcuts can be accessed by all SIMS users.

Viewing Shortcuts

View your own shortcuts by entering `$` in the **Quick Search** field. The codes and descriptions of all your shortcuts are displayed. Any shortcuts that are visible to all users can be located by entering `$global`.

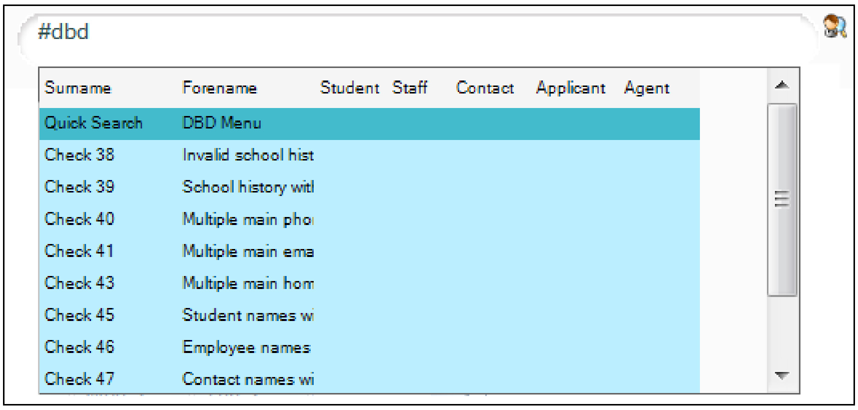
Deleting Shortcuts

It is possible to delete shortcuts by entering `–$XXX`, where `XXX` is the code of the shortcut.

Searching using Database Diagnostic Conditions

It is possible to activate a number of system diagnostics to further tidy your school's data, using the Quick Search functionality.

Entering `#DBD` displays a list of numbered diagnostic checks.



Token	Description
Check 38	Locates any pupil/students with school history records for the current school that have an end date earlier than the start date or two overlapping records. These records are excluded from the Validate Memberships routines.
Check 39	Finds pupil/students who have school history records without an on-roll flag.
Check 40	People with multiple main phone numbers. Only one number per person should be marked as main.
Check 41	People with multiple main email addresses at the same location. Only one email address per person should be marked as main.
Check 43	People with multiple current main home addresses. Only one home address per person should be marked as main.
Check 45	Locates current pupil/students whose names contain unusual characters: <?$&=, etc. or a digit or a defined title.
Check 46	Current employees whose names contain unusual characters.
Check 47	Contacts whose names contain unusual characters.
Check 56	People with invalid phone locations.
Check 57	People with invalid email locations.
Check 73	People with blank email or phone records.
Check 92	Pupil/students with overlapping SEN need types.

Using Wildcard Characters

The Quick Search functionality enables you to enter wildcard search characters in place of letters. This is particularly useful if you know only part of their name or are unsure of the spelling of their name, for example:

- The **?** wildcard character can be used in place of a single letter.
  - Entering `all?n` displays people whose name contains the letters `all`, then any letter, followed by an `n`. The letters all do not have to be the first letters of their name. For example, `all?n` returns allan, allen, ballinger, etc.
- The **%** wildcard character can be used in place of any number of letters, including zero.
  - Entering `a%` displays people with an `a` in their name followed by any number of letters. The letter `a` does not have to be the first letter of their name. For example, `a%` returns abbot, davies, crane, etc.
  - Entering `a%t` displays people with an `a` in their name, followed by any number of letters, then a letter `t`. The letter `a` does not have to be the first letter of their name and the letter `t` does not have to be the last letter of their name. For example, `a%t` returns abbot, astwick, barton, etc.
  - Entering `a%b%t` displays people whose name contains the letters `a`, `b` and `t` (in that order) with any number of characters in between. The letter `a` does not have to be the first letter of their name. For example, a%b%t returns alberto, elizabeth, lambert, etc.

Running Special Patches

Some patches provided by Capita SIMS may require you to specify particular parameters to enable the patch to be run successfully. You can enter and modify these parameters using the Quick Search functionality.

Enter `#params 19777|Weston%on%Sea|`. The `#params` filter identifies that patch parameters are being specified, followed by the patch number of `19777` and the school name, etc.

A maximum of six parameters can be specified, each separated by the vertical slash '|'. The current status of the patch is displayed in the Status Bar at the bottom of the Home Page. This indicates whether the patch has been applied or not.

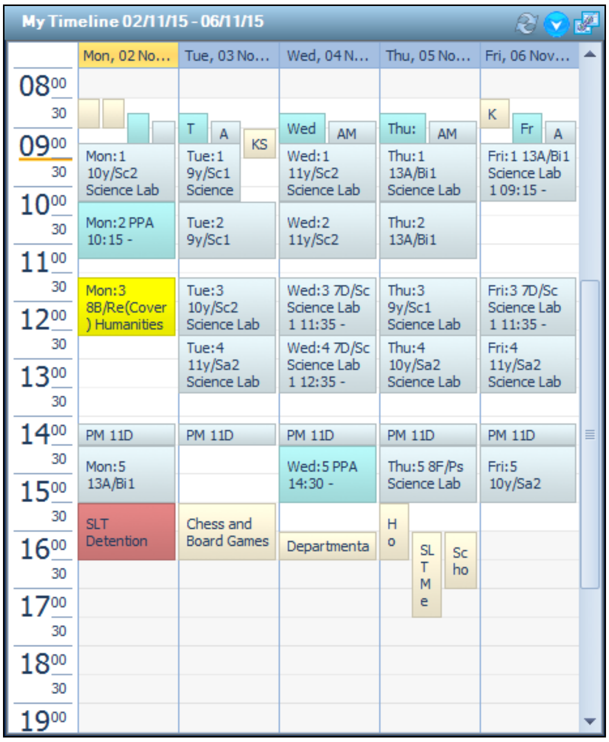
If the patch has been applied, a message similar to the following is displayed:

Parameters for patch 19777 (1) Weston%on%Sea (2) Weston%on%Sea patch has been applied: 123 rows updated.

If the message indicates that there were invalid parameters, you must correct the parameters entered and ensure that they correspond with the patch documentation supplied.

Viewing the My Timeline Panel

Your timetable is displayed in the **My Timeline** widget on the SIMS **Home Page**.



By default, your timetable is displayed for the current working week. Today's date is indicated on the timeline by a yellow highlight on the date in the heading row. In the previous graphic, today's date is Monday 2 November 2015. The scope of the view is displayed in the panel header. In the previous graphic, the timetable for the period Monday 2 November 2015 to Friday 6 November 2015 is displayed.

NOTE: The current time can be deduced by viewing the intersection of the highlighted date in the column header and the highlighted time bar displayed in the row header. In the previous example, it is approximately 09:30.

The items that can be displayed on your timeline are defined by the timeline configuration process (please see *Configuring the Home Page Timeline* on page *102*). By default, the following items are displayed on your timeline:

- School events (cream background). In the previous graphic, a Chess and Board Games event is scheduled for 15:30 on Tuesday 3 November
- Timetabled lessons (grey-blue background). In the previous graphic, all timetabled lessons are displayed in grey-blue
- Cover assignments (yellow background). In the previous graphic, there is a cover assignment scheduled for 11:35 on Monday 2 November
- Detentions (red background). In the previous graphic, a detention session is scheduled for 15:30 on Monday 2 November
- NCC periods (turquoise background)

- Cover rota periods (green background)
- PPA periods (light blue background). In the previous graphic, a PPA period is scheduled for 10:15 on Monday 2 November
- Absences
- Covered lessons/NCCs.

The range of options available on the **Timeline** widget are discussed in the following sections.

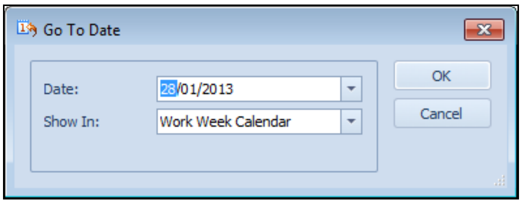
More Information:
Changing the Displayed Date of the Timeline on page *19*
Changing the Interval of the Timeline Widget on page *21*
Changing the My Timeline View on page *20*
Printing the Content of the Timeline Widget on page *22*

Changing the Displayed Date of the Timeline

By default, your timetable is displayed for the current working week. This can be changed using right-click functionality in the date bar at the top of the **My Timeline** widget. This can be used in conjunction with the **View** options (please see *Changing the My Timeline View* on page *20*) to present the required display.

Right-click a date in the heading row at the top of the **Timeline** widget to display a pop-up menu.

- To go to a specific date, select **Go to Date** to display the **Go To Date** dialog.



  - Enter the required **Date** or select a date from the drop-down list.
  - Select the required timeline view from the **Show In** drop-down list. The options are **Day Calendar**, **Work Week Calendar**, **Week Calendar**, **Month Calendar**.
  - Click the **OK** button to return to the **My Timeline** widget.
- To revert to today's date, select **Go to Today**.

*NOTES: The date selected will show the **My Timeline** for that date in the selected view (please see* Changing the My Timeline View *on page* 20*).*

*The display settings are reset the next time you open the SIMS **Home Page**.*

Changing the My Timeline View

The display can be amended to show your timetable in one of the following formats:

Timeline View	What is Displayed?
Day View	Displays your timetable for today only.
Work Week View	Displays your timetable for the current working week. This is the default view.
Week View	Displays only events for which you are timetabled for the whole week (including weekends).
Month View	Displays only events for which you are timetabled for the whole month (including weekends).

Right-click a date in the column heading at the top of the **My Timeline** widget to display a pop-up menu. Alternatively, right-click a time in the row headings to access the same functionality.

Select **Change View To** then one of the following options to achieve the required view:

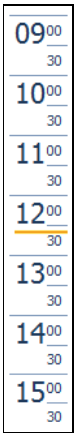
- Day View
- Work Week View (default)
- Week View
- Month View.

> *NOTES: The view selected will show the* ***My Timeline*** *widget for the selected timeframe (please see* Changing the Displayed Date of the Timeline *on page* 19*).*
>
> *The display settings are reset the next time you open the SIMS* ***Home Page****.*

Changing the Interval of the Timeline Widget

The time interval can be amended to show the content of the **My Timeline** widget in greater detail.

Right-click a date in the row heading on the **My Timeline** widget to display a pop-up menu.



The previous graphic shows a 30 minute time interval.

Select one of the following options to achieve the required view:

- 60 Minutes
- 30 Minutes
- 15 Minutes
- 10 Minutes
- 6 Minutes
- 5 Minutes

NOTES: The current selection is indicated by a tick in the pop-up menu.

*The more regular the interval, the more detailed the view on the **My Timeline** widget.*

*The display settings are reset the next time you open the SIMS **Home Page**.*

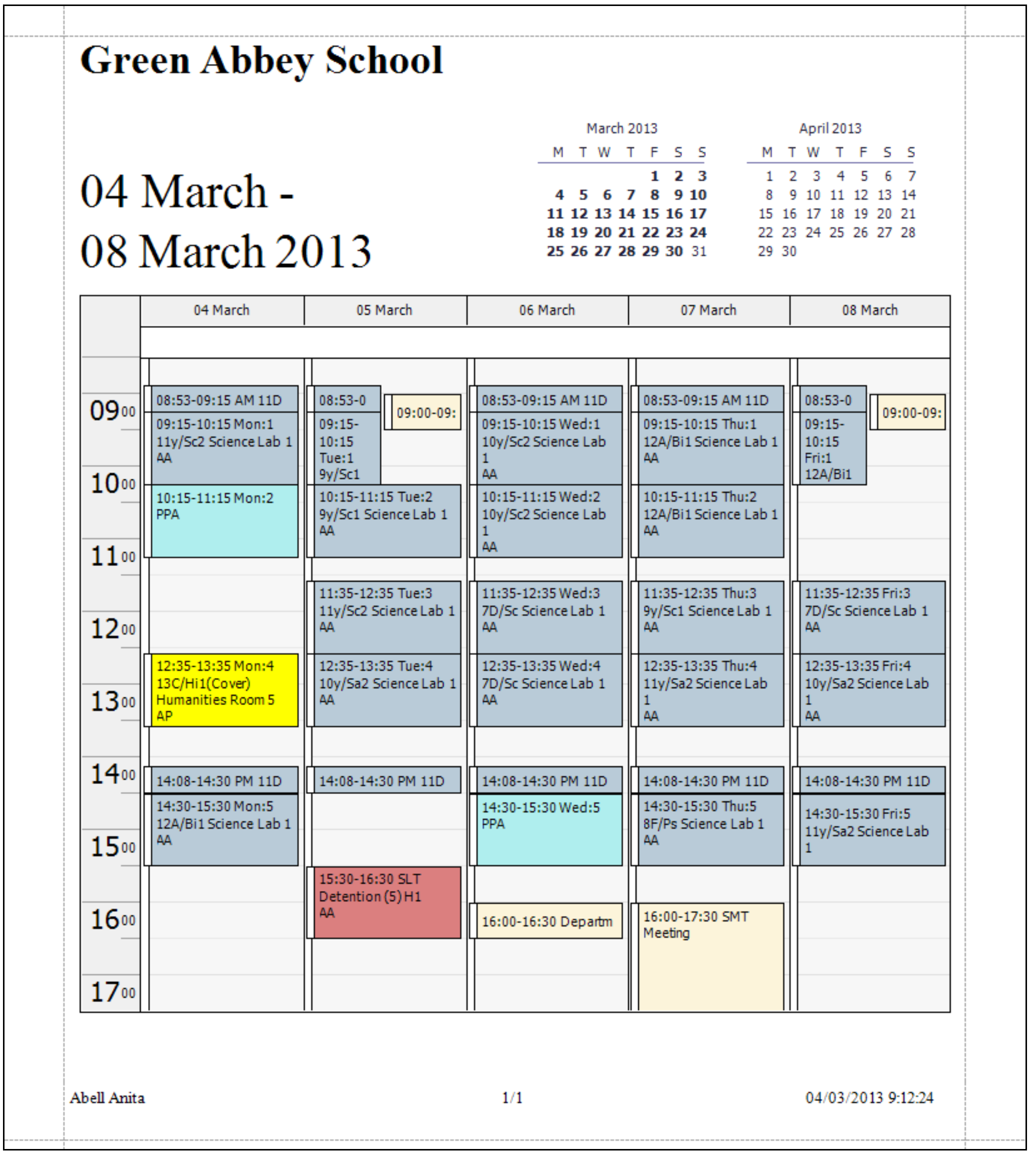
Printing the Content of the Timeline Widget

The content of the **My Timeline** widget can be printed.

The printed output produces the view of the **My Timeline** widget displayed on-screen at the time of printing. Therefore, you must prepare the **My Timeline** widget (i.e. select the required timeframe, the view and the interval) prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the **Preview** page.

 *Options button*



The preview displays your school name and the timeframe of the timeline, together with minimised calendars for the current and following month. On the minimised calendars, the days that contain a scheduled lesson, detention session, etc. are displayed in bold.

2. Click the **Print** button to print your timetable.

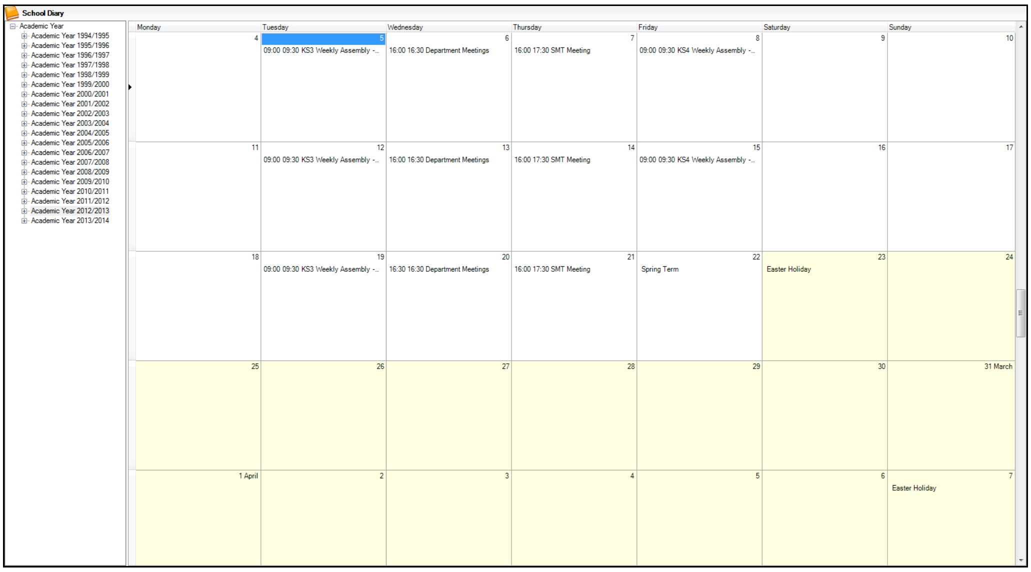
More Information:
Changing the Displayed Date of the Timeline on page *19*
Changing the My Timeline View on page *20*
Changing the Interval of the Timeline Widget on page *21*

Viewing the School Diary

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Click the **Options** button in the **My Timeline** panel then select **School Diary** from the pop-up menu to display the **School Diary** page.

 *Options button*



*NOTE: The School Diary can also be accessed via the **School Diary** widget and via **Focus | School | School Diary**.*

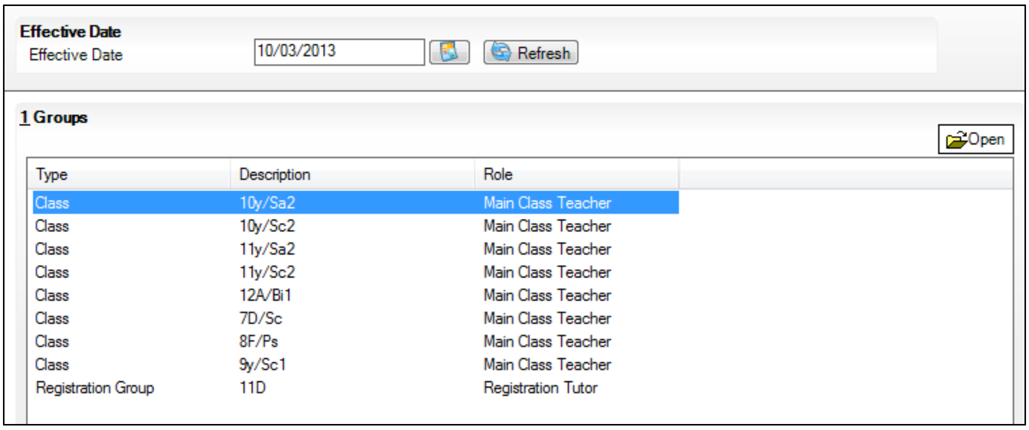
More Information:
Viewing the School Diary on page *39*

Viewing My Groups

Any groups for which you are the supervisor can be viewed from the **My Timeline** widget.

1. Click the **Options** button in the **My Timeline** panel then select **My Groups** from the pop-up menu to display the **Groups for** page.

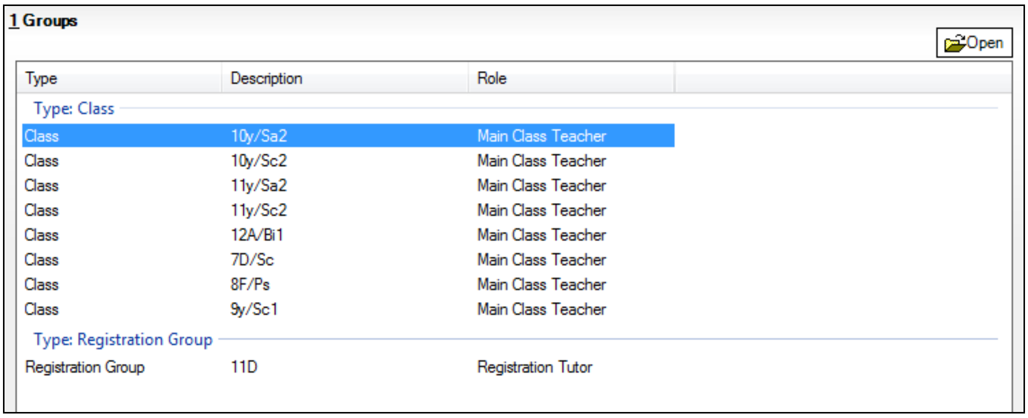
 *Options button*



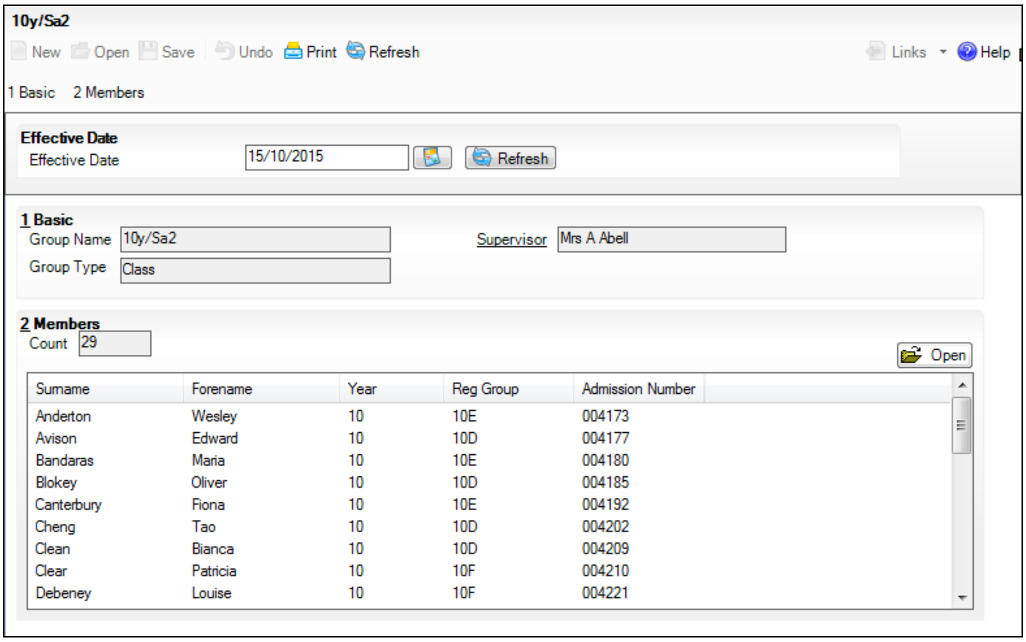
2. The **Effective Date** defaults to today's date but can be changed by entering the required date or clicking the **Calendar** button then selecting a date. If you change the date, you must click the **Refresh** button to update the list of **Groups**.

   In the **Groups** panel, all the groups of which you are a member (on the effective date) are displayed, together with the group **Description** and the staff member's **Role** in the groups.

   This information can be viewed in a variety of display orders. Right-click anywhere in the dialog then select **Type**, **Description** or **Role** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the dialog then selecting **Hide Groups** from the pop-up menu. Either double-click the group that you wish to view in more detail or highlight it then click the **Open** button.



The **Basic** panel displays the **Group Name**, **Group Type** and **Supervisor**. If you have the appropriate permissions, you can click the **Supervisor** hyperlink to display their full employee record on the **Employee Details** page.

The **Members** panel displays all the group members, together with the number of members (**Count**).

This information can be viewed in a variety of display orders, as described in Step 2.

3. To access the pupil/student record, double-click the required pupil/student or highlight them then click the **Open** button to display the **Student History** page.
4. Click the **Print** button to print a copy of the list of groups.

Configuring the My Timeline Widget

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Click the **Options** button in the **My Timeline** panel then select **Configure** from the pop-up menu to display the **Timeline Configuration** dialog (please see *Configuring the My Timeline Panel* on page *103*).

 *Options button*

Refreshing the Content of the My Timeline Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **My Timeline** widget manually.

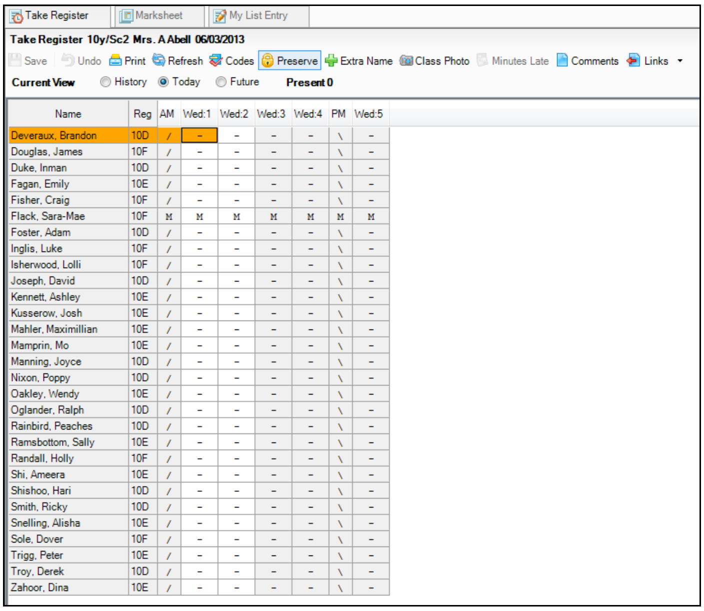
Click the **Refresh** button in the **My Timeline** widget to refresh its content.

Refresh button

More Information:
Configuring the My Timeline Panel on page *103*

Taking the Register

Right-click the required class or registration group in the **My Timeline** widget then select **Take Register** from the pop-up menu to display the **Take Register** page for the selected class, enabling the register to be taken. For Attendance users, this displays AM or PM attendance registers. For Lesson Monitor users, this displays the applicable register.

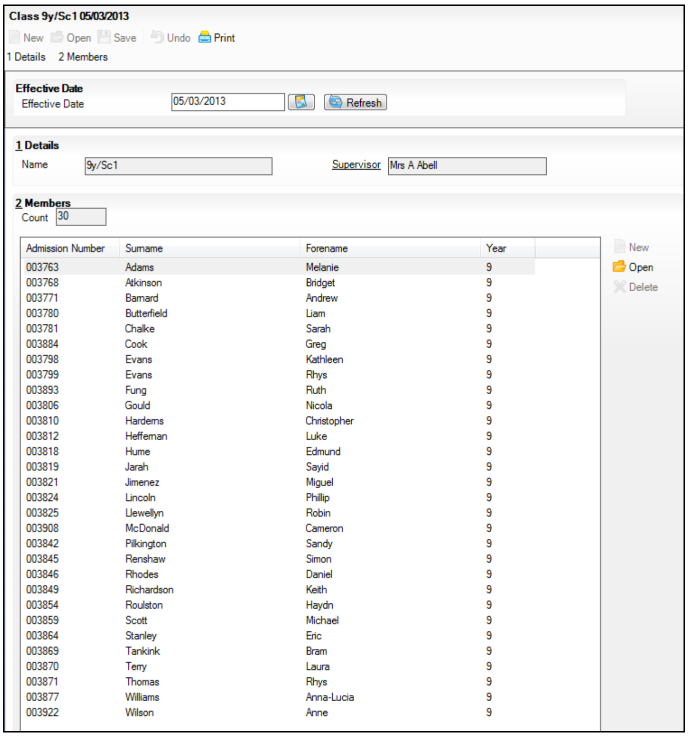


Additional Resources:

Taking a Register chapter in the *Managing Pupil/Student Attendance* handbook
Taking a Register chapter in the *Monitoring Session and Lesson Attendance* handbook

Generating a Student List Report

Right-click the required class or registration group in the **My Timeline** widget then select **Student List** from the pop-up menu to display the **Class** page or the **Registration Group** page (depending on the type of class selected), which displays the members of the selected class.



Admission Number	Surname	Forename	Year
003763	Adams	Melanie	9
003768	Atkinson	Bridget	9
003771	Barnard	Andrew	9
003780	Butterfield	Liam	9
003781	Chalke	Sarah	9
003884	Cook	Greg	9
003798	Evans	Kathleen	9
003799	Evans	Rhys	9
003893	Fung	Ruth	9
003806	Gould	Nicola	9
003810	Hardems	Christopher	9
003812	Heffernan	Luke	9
003818	Hume	Edmund	9
003819	Jarah	Sayid	9
003821	Jimenez	Miguel	9
003824	Lincoln	Phillip	9
003825	Llewellyn	Robin	9
003908	McDonald	Cameron	9
003842	Pilkington	Sandy	9
003845	Renshaw	Simon	9
003846	Rhodes	Daniel	9
003849	Richardson	Keith	9
003854	Roulston	Haydn	9
003859	Scott	Michael	9
003864	Stanley	Eric	9
003869	Tankink	Bram	9
003870	Terry	Laura	9
003871	Thomas	Rhys	9
003877	Williams	Anna-Lucia	9
003922	Wilson	Anne	9

From here it is possible to display a pupil/student's details (by highlighting their name then clicking the **Open** button) and to print the class list (by clicking the **Print** button).

Viewing Marksheets

Right-clicking the required class in the **My Timeline** widget then select **Marksheets** from the pop-up menu to display the **Find Marksheet** browser, which displays all the marksheets for which you have permission to view. Double-click the required marksheet to display it on the **My Marksheet Entry** page.

Additional Resources:

Entering and Reviewing Data using Marksheets chapter of the *Administering Assessment* handbook

Profile List Entry

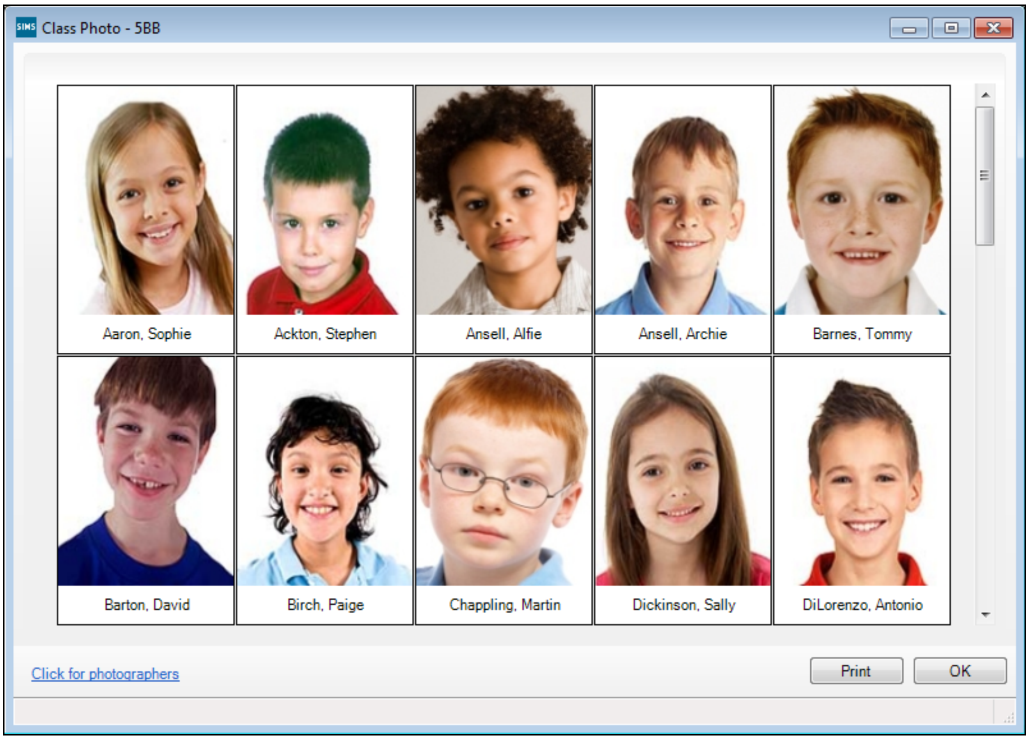
Right-click the required class in the **My Timeline** panel then select **Profile List Entry** to display the **List Entry** browser. This enables teachers to work on groups for whom they are responsible and select comments for each pupil/student.

Additional Resources:

Selecting Comments using List Entry in the *Selecting Comments* chapter of the *Managing Pupil/Student Profiles* handbook

Viewing Class Photographs

Right-click the required class or registration group in the **My Timeline** widget then select **Class Photographs** from the pop-up menu to display the **Class Photo** dialog. This option is particularly useful for supply staff or new teachers, because it displays photographs of all the pupil/students in the selected class (if pupil/student photographs are recorded in SIMS).

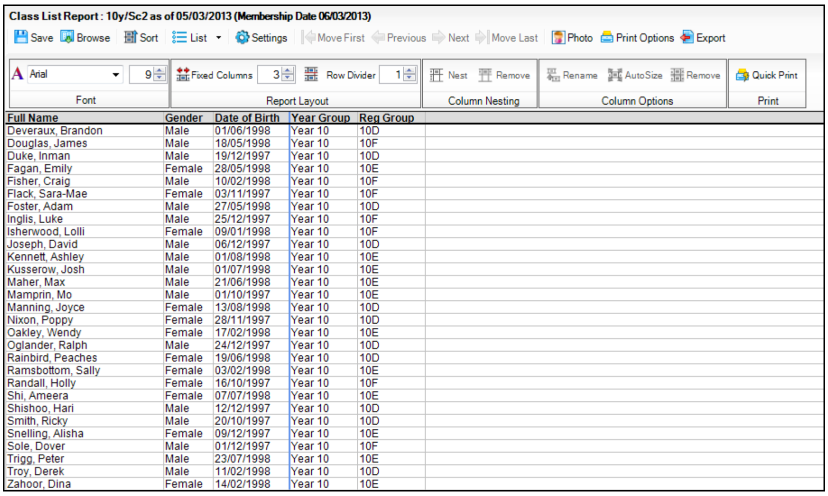


The **Click for photographers** hyperlink opens a web page on the Capita SIMS website (http://www.capita-sims.co.uk/our-partners/accredited-school-photographers), which contains information about accredited school photographers.

Click the **Print** button to print the photographs or the **OK** button to return to the SIMS **Home Page**.

Generating a Class List Report

Right-click the required class or registration group in the **My Timeline** widget then select **Class List Report** from the pop-up menu to display the **Class List Report** page or the **Registration Group List** page (depending on the type of class selected), which displays the members of the selected class. A range of additional functionality is available.



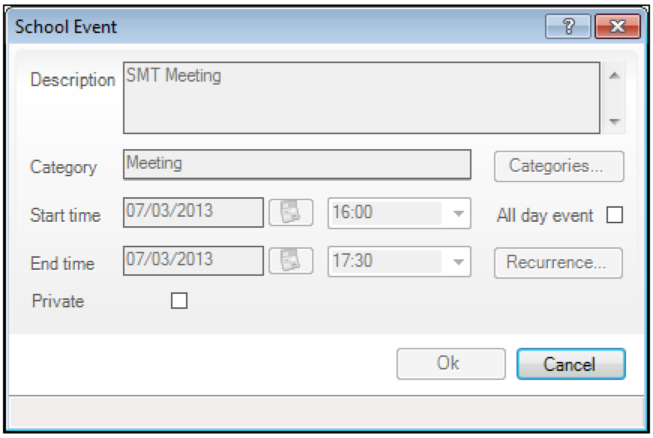
Full Name	Gender	Date of Birth	Year Group	Reg Group
Deveraux, Brandon	Male	01/06/1998	Year 10	10D
Douglas, James	Male	18/05/1998	Year 10	10F
Duke, Inman	Male	19/12/1997	Year 10	10D
Fagan, Emily	Female	28/05/1998	Year 10	10E
Fisher, Craig	Male	10/02/1998	Year 10	10F
Flack, Sara-Mae	Female	03/11/1997	Year 10	10F
Foster, Adam	Male	27/05/1998	Year 10	10D
Inglis, Luke	Male	25/12/1997	Year 10	10F
Isherwood, Lolli	Female	09/01/1998	Year 10	10F
Joseph, David	Male	06/12/1997	Year 10	10D
Kennett, Ashley	Male	01/08/1998	Year 10	10E
Kusserow, Josh	Male	01/07/1998	Year 10	10E
Maher, Max	Male	21/06/1998	Year 10	10E
Mamprin, Mo	Male	01/10/1997	Year 10	10E
Manning, Joyce	Female	13/08/1998	Year 10	10D
Nixon, Poppy	Female	28/11/1997	Year 10	10D
Oakley, Wendy	Female	17/02/1998	Year 10	10E
Oglander, Ralph	Male	24/12/1997	Year 10	10D
Rainbird, Peaches	Female	19/06/1998	Year 10	10D
Ramsbottom, Sally	Female	03/02/1998	Year 10	10E
Randall, Holly	Female	16/10/1997	Year 10	10F
Shi, Ameera	Female	07/07/1998	Year 10	10E
Shishoo, Hari	Male	12/12/1997	Year 10	10D
Smith, Ricky	Male	20/10/1997	Year 10	10D
Snelling, Alisha	Female	09/12/1997	Year 10	10E
Sole, Dover	Male	01/12/1997	Year 10	10F
Trigg, Peter	Male	23/07/1998	Year 10	10E
Troy, Derek	Male	11/02/1998	Year 10	10D
Zahoor, Dina	Female	14/02/1998	Year 10	10E

Additional Resources:

Running the Class List Report in the *Producing Student List Reports* chapter of the *Producing Student List, Student Analysis and Timetable Reports* handbook

Viewing Event Details

Right-click the required event in the **My Timeline** widget then select **Show Event** from the pop-up menu to display the **School Event** dialog, which displays details of the recorded event. The information is displayed in read-only format.



Click the **Cancel** button to return to the SIMS **Home Page**.

Viewing Detention Details

Right-click the required class or registration group in the **My Timeline** widget then select **Show Detention** from the pop-up menu to display the **Detention Details** page, which displays the date and time of the detention session, the pupil/students who are scheduled to attend, any linked activities, etc.

Additional Resources:

Recording Detentions chapter of the *Managing Pupil/Students* handbook

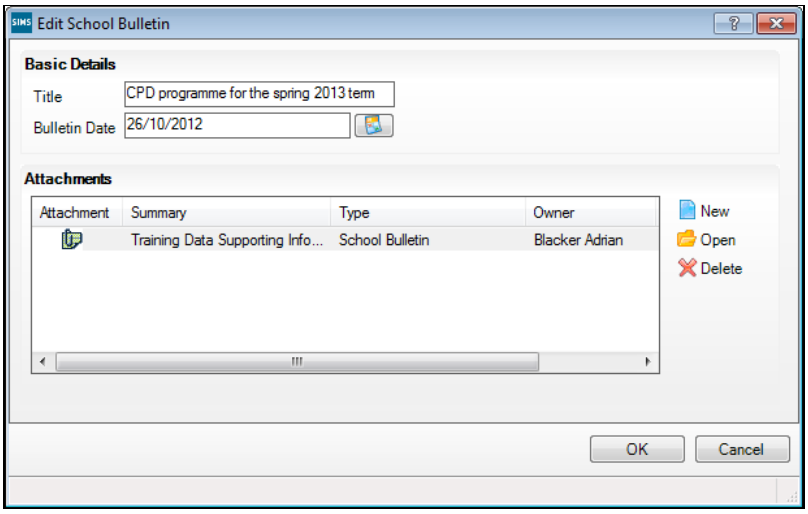
Viewing the School Bulletins Panel

School bulletins can be published by users with School Administrator or Administrative Assistant permissions. Once published, they can be opened and viewed by all SIMS users (please see *Adding a School Bulletin* on page *31*).

Any published bulletins are displayed in the **School Bulletins** widget on the SIMS **Home Page**.

> *NOTE: If the number of published bulletins exceeds the number that can be displayed in the **School Bulletins** widget, the **More** hyperlink enables access to the additional bulletins in full screen mode.*

To access a bulletin from the minimised **School Bulletins** widget, click the name of the bulletin to display the **Edit School Bulletin** dialog. To access a bulletin from the maximised view of the **School Bulletins** widget, highlight the required bulletin then click the **Open** button to display the same dialog.



The **Title** of the bulletin and the **Bulletin Date** are displayed in the **Basic Details** panel.

Any **Attachments** to the bulletin are displayed in the bottom panel.

For full instruction on adding, opening, viewing and deleting attachments, please refer to *Attaching a New Note/Document* in the *Using the Pupil/Student Links Panel* chapter of the *Managing Pupil/Students* handbook.

Adding a School Bulletin

This section is applicable only to users with School Administrator and Administration Assistant permissions.

If your school produces a weekly bulletin of forthcoming events, reminders to staff, etc. it can be posted to the **School Bulletins** widget on the **Home Page** of all SIMS users. This is a convenient method of providing information to all your staff.

1. Click the **Options** button then select **Add new** from the pop-up menu to display the **School Event** dialog.

Options button

2. Enter the **Title** of the bulletin and a **Bulletin Date** in the **Basic Details** panel.

For full instruction on adding, opening, viewing and deleting attachments, please refer to *Attaching a New Note/Document* in the *Using the Pupil/Student Links Panel* chapter of the *Managing Pupil/Students* handbook.

Removing a School Bulletin

This section is applicable only to users with School Administrator and Administration Assistant permissions.

School bulletins can be removed from the SIMS **Home Page** if they are no longer relevant or have been added in error.

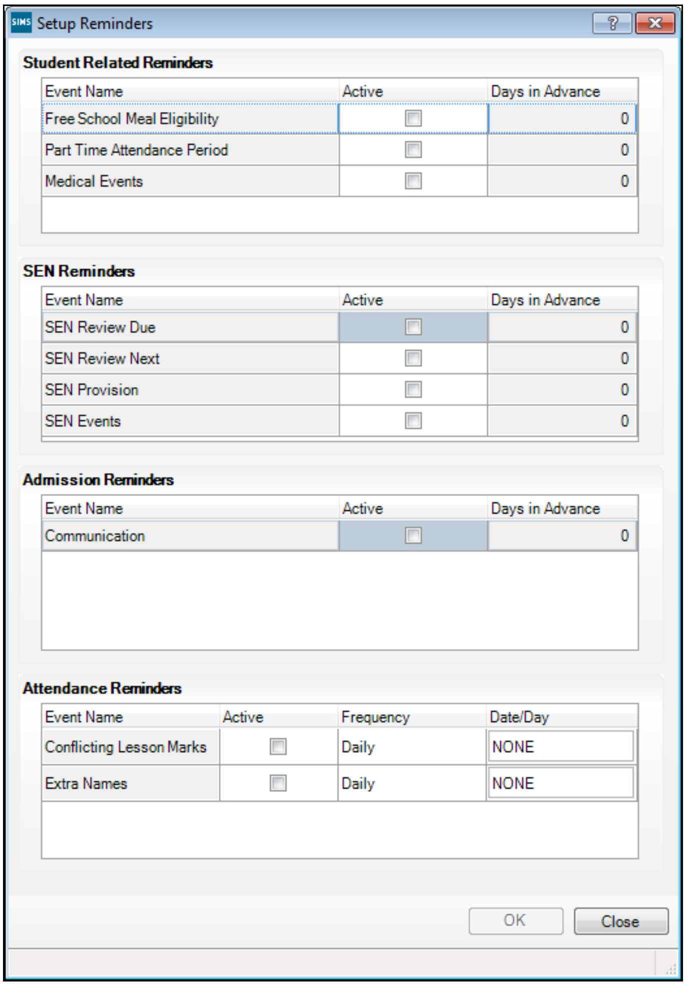
NOTE: If a bulletin is removed, any associated documents remain on the Document Management Server.

1. Maximise the **School Bulletins** widget to full screen mode.
2. Highlight the bulletin you wish to delete then click the **Delete** button.
3. Restore the panel to minimised view and return to the SIMS **Home Page**.

Setting Up Reminders

Reminders can be set up to notify you when a deadline is about to be reached. This enables you to carry out appropriate action prior to the due date. You can select the events or personal tasks for which you want a reminder, together with the number of days' notice. Once set up, reminders are displayed in the **My Reminders** panel on the SIMS **Home Page**.

Select **Focus | Alerts | Setup Reminders** to display the **Setup Reminders** dialog.



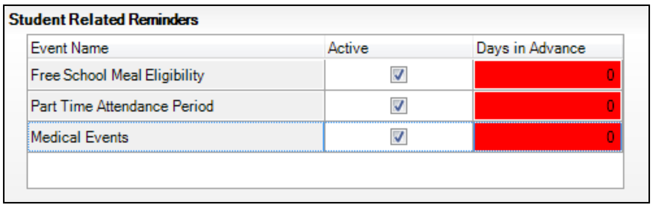
The reminders are split into the following panels:

- **Student Related Reminders**
- **SEN Reminders**
- **Admission Reminders** (only visible to schools who have applied a Basic or Full Admissions licence)
- **Attendance Reminders**.

Setting a Reminder as Active

All of the events displayed in the **Setup Reminders** dialog can be activated or deactivated. By default, all events are set as inactive, i.e. no reminders are set. You must now decide the events for which you want to receive a reminder.

1. Select the **Active** check box adjacent to the **Event Name** that you want to be reminded of, e.g. **Medical Events**. The **Days in Advance** column becomes red, indicating that the days need to be populated.

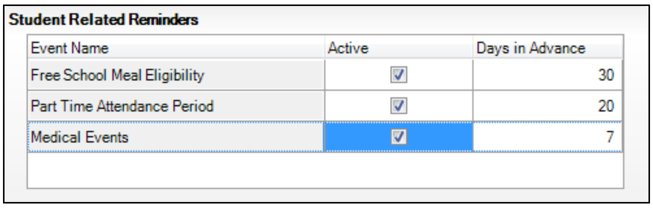


2. Deselect the **Active** check box adjacent to each event for which you do not want to receive a reminder.

Specifying the Number of Days' Notice

For each reminder set, you need to enter the number of days in advance of the event that you want to be reminded. A minimum of one and a maximum of 365 days can be entered.

1. Click in the applicable **Days in Advance** cell and enter the required number of days (the cell background changes to white).

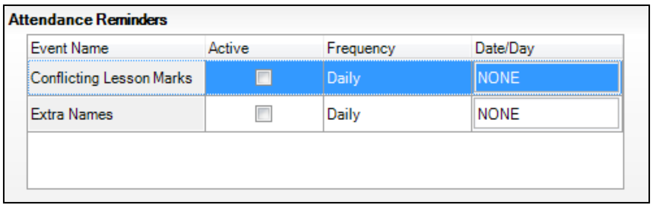


2. Repeat this process for any other reminders, if required.

Specifying the Frequency of Attendance Reminders

It is possible to specify the frequency of the reminders for **Conflicting Lesson Marks** and **Extra Names** in the **Attendance Reminders** panel.

Select **Daily**, **Weekly** or **Monthly** from the **Frequency** drop-down list. The options available from the **Date/Day** column depend on the **Frequency** selected.



- For **Daily** frequency, the **Date/Day** column cannot be adjusted because the reminder will occur at the earliest point of each day. This is either when SIMS is first opened or when SIMS first refreshes the **My Reminders** panel on the SIMS **Home Page**.
- For **Weekly** frequency, the **Date/Day** column provides a drop-down list that enables you to select the day of the week on which the reminder will be displayed.
- For **Monthly** frequency, the **Date/Day** column provides a drop-down list that enables you to select the date in the month on which the reminder will be displayed.

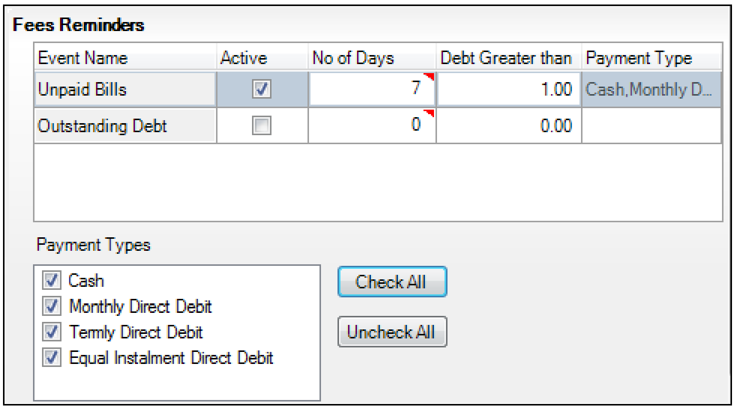
More Information:
Setting Panel Refresh Rates on page *71*

Setting up Fees Reminders

Applicable only if the Fees licence has been applied.

It is possible to set up an alert to show bill payers with overdue bills and outstanding balances so that you can send out reminders to the relevant bill payers. The alerts will then be displayed on the **My Reminders** widget on the SIMS **Home Page**.

1. Select **Focus | Alerts | Setup Reminders** to display the **Setup Reminders** dialog.



2. Select the **Active** check box adjacent to the **Event Name** that you want to be reminded of, e.g. **Unpaid Bills**.

   The definition of **No. of Days** varies depending on whether the reminder is for **Unpaid Bills** or **Outstanding Debt**:

   - **Unpaid Bills** - number of days after the due date of the bill
   - **Outstanding Debt** - number of days after the date defined on **Period 1** of the **Aged Debtors Report**.
3. Based on the relevant definition above, enter the appropriate **No. of Days** in the field provided.
4. Enter the value of the **Debt Greater than** to be included, e.g. `£1.00`.
5. The **Payment Type** is selected from the **Payment Types** table. The check boxes can be selected individually or by clicking the **Check All** and **Uncheck All** buttons.
6. Click the **OK** button to complete the selection and close the dialog.

Saving the Reminders

Once all the required information has been entered, click the **OK** button to save the reminders.

Setting Up Personal Tasks

Personal Tasks enable you to organise any particular task or event. It is possible to add your own personal notes to each task and set deadlines for the beginning or completion of each task, in a similar way to tasks in Microsoft® Outlook.

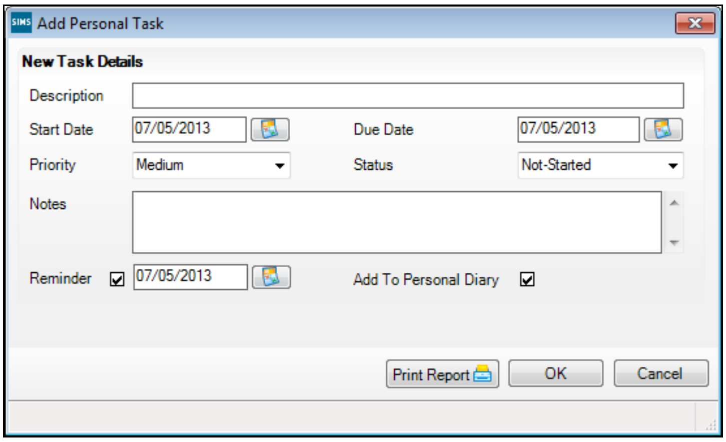
Reminders can be set up to prompt you at any point prior to the commencement or completion of a task. These reminders can also be added to the School Diary, if required. Any reminders set are displayed in the **My Reminders** panel of the **Home Page** on the defined date. For example, you can set a task to `Mark history homework this evening`, with a reminder to prompt you on the day the task is due to be completed and a calendar entry that is displayed on your **Home Page**.

Recording a Personal Task

1. Select **Focus | Alerts | Personal Tasks** to display the **Personal Tasks** page.

The **Personal Tasks** page displays a list of all personal tasks that have been added, including the designated **Start Date** and **Due Date**, **Description** and **Status**.

2. Click the **New** button to display the **Add Personal Task** dialog.



3. Enter the **Description** of the task, e.g. `Mark history homework this evening`.
4. The **Start Date** and **Due Date** default to today's date but can be changed by clicking the **Calendar** button then selecting the required date.

   The **Start Date** is the date on which you intend to begin the task and the **Due Date** is the date on which you intend to complete the task.
5. By default, the **Priority** is set to **Medium**. This can be changed by selecting **High**, **Medium** or **Low** from the drop-down list. This setting is for personal use.
6. Select the **Status** from the drop-down list, e.g. **Not-Started**, **Started**, **In-Progress** or **Completed**.
   - If the **Start Date** of a personal task has passed and its **Status** is still set to **Not Started**, this task will be highlighted in red on the **Personal Tasks** page.
   - If the **Due Date** of a personal task has passed and its **Status** is not set to **Completed**, then this task will be highlighted in red on the **Personal Tasks** page.

   The **Status** of **Started** could be used to describe a task that you have just started. **In-Progress** could be used to describe an ongoing task that is in progress.
7. Enter any additional information in the **Notes** field, such as `Mark Year 7 and 8 History first`.

   When a personal task is considered important, you may want to set up a reminder that provides a prompt before this task is due. It is advisable to set a reminder to give you enough time to prepare for (or complete) the task. For example, you may benefit from a reminder the day before an important meeting.
8. Select the **Reminder** check box to set a reminder for this task then click the **Calendar** button and select the date for the reminder.

> *NOTES: If a reminder is set for the task, the description is displayed in the* ***Subject*** *column of the* ***My Reminders*** *panel on the SIMS* ***Home Page****.*
>
> *A reminder is displayed at the earliest point on the day it is due. This is either the first time SIMS is run on your workstation on that day or the first time the* ***My Reminders*** *panel on the SIMS* ***Home Page*** *is refreshed.*

9. Select the **Add to Personal Diary** check box to add this task to your School Diary. The **Description** displays in the **School Diary** panel of your SIMS **Home Page** and on the School Diary itself (via **Focus | School | School Diary**).

   Click the **Print Report** button to print a report of the selected personal task. The full details of the task are displayed in your web browser, from where it can be printed, if required.
10. Once all the required information has been entered, click the **OK** button.
11. Repeat steps *2* to *10* to add more personal tasks, if required.
12. Once you have added all required personal tasks, click the **Save** button.

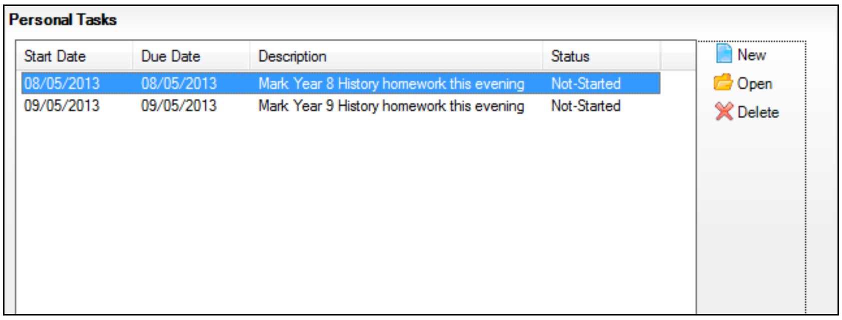
    Any new personal tasks are displayed in the **My Reminders** panel on the SIMS **Home Page**, once this panel has refreshed. If you selected the **Add To Personal Diary** check box, the personal tasks are also added to the **School Diary** panel on the SIMS **Home Page** and to the School Diary itself (via **Focus | School | School Diary**).

More Information:
Setting Panel Refresh Rates on page *71*

Viewing/Editing a Personal Task

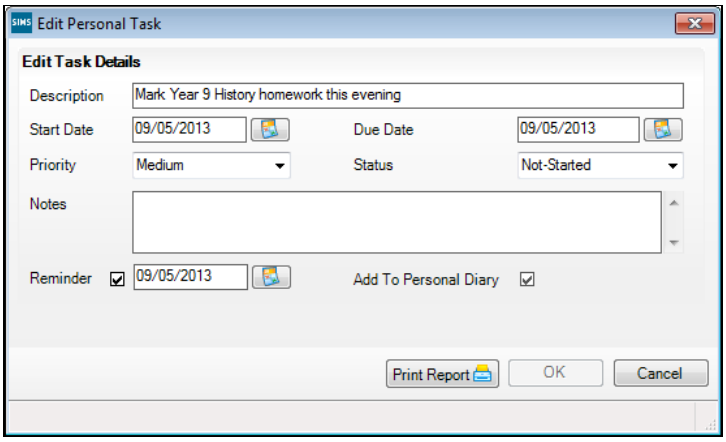
Personal tasks set up without reminders are displayed only on the **Personal Tasks** page. If you have elected to add the task to your personal diary, it will also be displayed on the School Diary.

1. Select **Focus | Alerts | Personal Tasks** to display the **Personal Tasks** page, listing all of your personal tasks.



- If the **Start Date** of a personal task has passed and its **Status** is still set to **Not Started**, this task will be highlighted in red.
- If the **Due Date** of a personal task has passed and its **Status** is not set to **Completed**, then this task will be highlighted in red.

2. Highlight the required personal task then click the **Open** button to display its details in the **Edit Personal Task** dialog.



3. Make the necessary changes then click the **OK** button to close the dialog.
4. Click the **Save** button on the **Personal Tasks** page to save your changes.

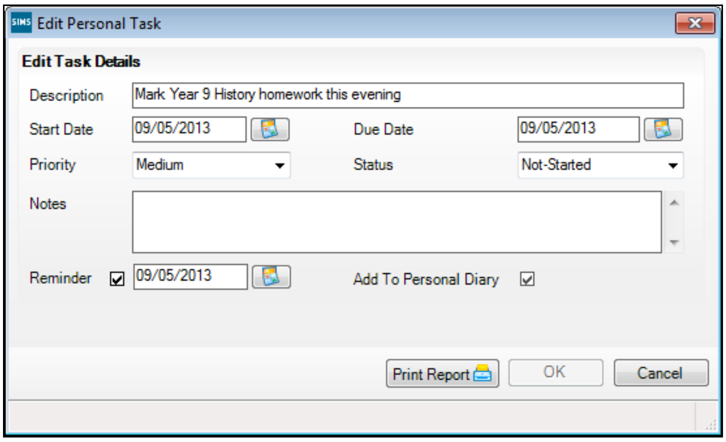
   Once the SIMS **Home Page** refreshes, any changes made to your personal tasks are displayed.

More Information:
Setting Panel Refresh Rates on page *71*
Recording a Personal Task on page *35*

Viewing/Editing Tasks from the SIMS Home Page

A reminder can be set for your personal task, which prompts you at any point prior to the commencement or completion of a task. Reminders are displayed in the **My Reminders** panel on the SIMS **Home Page** when the reminder date is today. Personal tasks can be viewed and edited using the SIMS **Home Page**.

1. Select **Focus | Home Page** to display the SIMS **Home Page**.
2. In the **My Reminders** panel, click the required task to display its details in the **Edit Personal Task** dialog.



3. Make any necessary changes then click the **OK** button to return to the SIMS **Home Page**.

> *NOTE: If you chose to add the personal task to the School Diary, the task can be viewed by clicking it in the **School Diary** panel on the SIMS **Home Page**. The task can also be viewed by double-clicking it in the School Diary itself (via **Focus | School | School Diary**). However the task cannot be edited or deleted from either the School Diary or the **School Diary** panel on the SIMS **Home Page**.*

Deleting a Personal Task

Personal tasks can be deleted when they are no longer required.

> *NOTE: Careful thought should be given to deleting personal tasks because once they have been deleted, they cannot be recovered.*

1. Select **Focus | Alerts | Personal Tasks** to display the **Personal Tasks** page.
2. Highlight the required personal task then click the **Delete** button. A message prompts for confirmation that you want to delete the task. Click the **Yes** button to confirm the deletion.

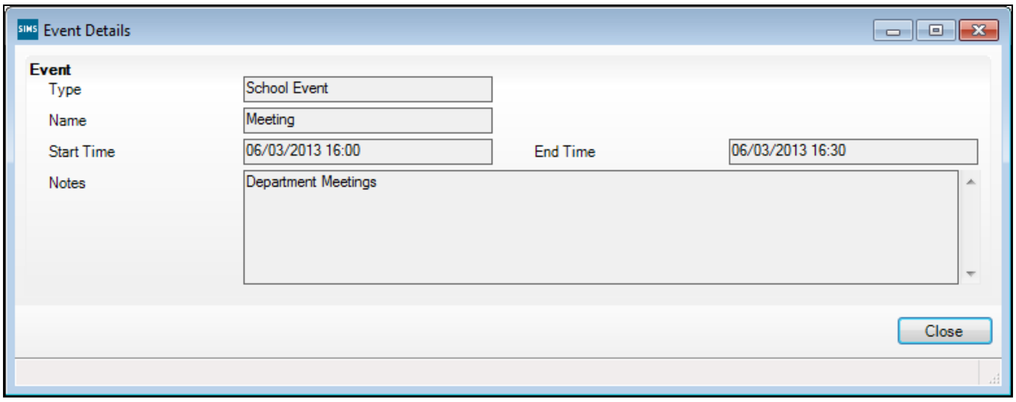
Viewing the School Diary

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Any school events are displayed in the **School Diary** widget on the SIMS **Home Page**.

> *NOTES: The School Diary can also be accessed via the **Options** button in the **My Timeline** widget and via **Focus | School | School Diary**.*
>
> *If the number of school events exceeds the number that can be displayed in the **School Diary** widget, the **More** hyperlink enables access to the additional events in full screen mode.*

1. To access a school event from the minimised **School Diary** widget, click the name of the event to display the **Event Details** dialog. To access an event from the maximised view of the **School Diary** widget, highlight the required event then click the **Open** button to display the same dialog.



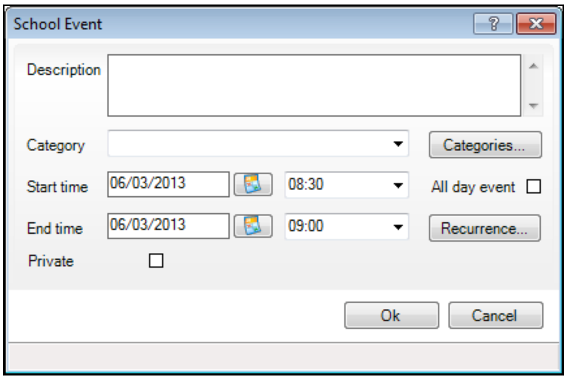
The event details are displayed in read-only format.

2. Click the **Close** button to return to the SIMS **Home Page**.

Adding a School Diary Event

1. Click the **Options** button then select **Add new** from the pop-up menu to display the **School Event** dialog.

Options button



2. Enter a **Description** for the event. This text is displayed in the School Diary.
3. Select an appropriate event **Category** from the drop-down list.

> *NOTE: If required, new categories can be created by clicking the **Categories** button, entering the category in the **New category** field and clicking the **Add** button. Click the **Ok** button to return to the **School Event** dialog.*

4. If the event is scheduled to last for an entire day, select the **All day event** check box. This disables the time drop-down lists.
5. Specify the **Start time** and **End time** for the event by entering the required dates (they default to today's date), or click the **Calendar** button adjacent to each field, then select the required dates. Select the required times from the drop-down lists. You cannot enter times for all day events.
6. Recurring events can be set up by clicking the **Recurrence** button to display the **Event Recurrence** dialog. For more information, please refer to the *Setting Up the School Diary* chapter of the *Setting Up and Administering SIMS* handbook.
7. Select the **Private** check box if the event is of a personal nature. This prevents other users from seeing the details of the event. The **Private** check box should not be used for normal school events. Any events that you mark as **Private** are only visible from your personal Home Page. Personal appointments and days off can be added to your individual **School Diary** view as reminders, etc.

8. Click the **OK** button to save the event.

> *NOTE: Once a school event has been added, it can be deleted only when the school diary is accessed via* ***Focus | School | School Diary****.*

Additional Resources:

Setting Up the School Diary chapter of the *Setting Up and Administering SIMS* handbook

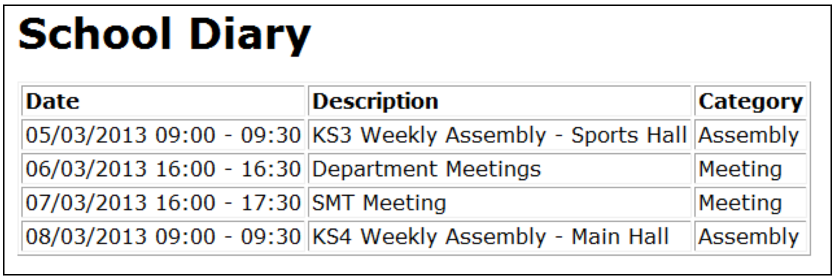
Printing the School Diary

The content of the **School Diary** widget can be printed.

The printed output produces the view of the **School Diary** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **School Diary** widget prior to printing (please see *Refreshing the Content of the School Diary Widget* on page *41*).

1. Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser.

Options button



School Diary

Date	Description	Category
05/03/2013 09:00 - 09:30	KS3 Weekly Assembly - Sports Hall	Assembly
06/03/2013 16:00 - 16:30	Department Meetings	Meeting
07/03/2013 16:00 - 17:30	SMT Meeting	Meeting
08/03/2013 09:00 - 09:30	KS4 Weekly Assembly - Main Hall	Assembly

2. Click the **Print** button to print the diary events.

Refreshing the Content of the School Diary Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **School Diary** widget manually.

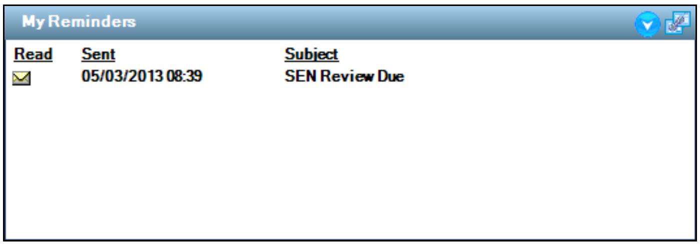
Click the **Refresh** button in the **School Diary** widget to refresh its content.

Refresh button

Viewing My Reminders

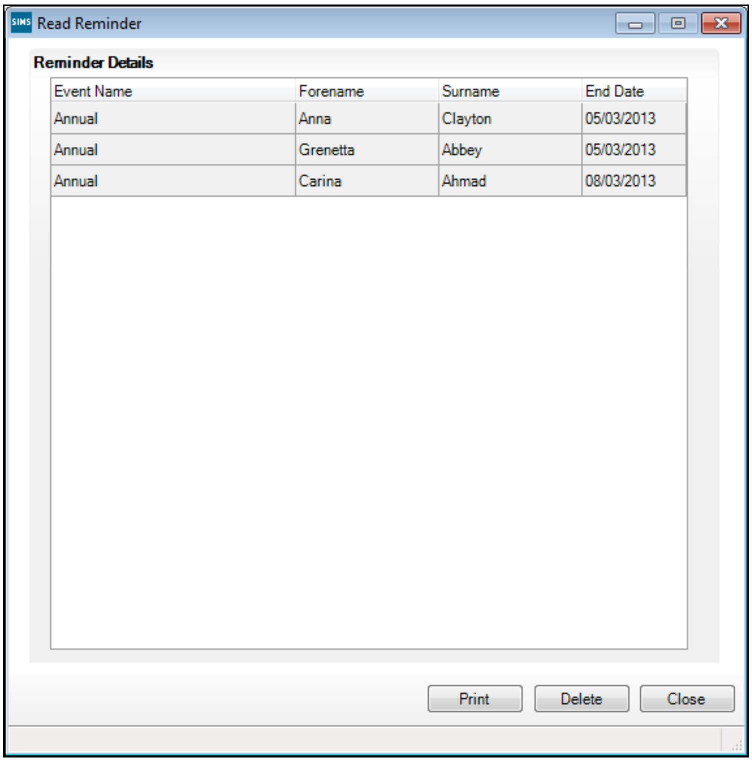
SIMS can be configured to generate a reminder to advise users of forthcoming deadlines, e.g. free school meal eligibility, medical events, SEN reviews, etc.

Each SIMS user can specify the reminders they want to set and the number of days prior to the event occurring that the reminder should be generated and sent to the applicable member(s) of staff. The reminders are displayed in the **My Reminders** widget on the SIMS **Home Page**. The date the reminder was **Sent**, the **Subject** line and the **Read** status is displayed. In the following example, a SEN review reminder has been sent.



> *NOTE: If the number of reminders exceeds the number that can be displayed in the* ***My Reminders*** *widget, the* ***More*** *hyperlink enables access to the additional reminders in full screen mode.*
>
> *A maximum of 50 reminders can be displayed on your Home Page. Once this limit has been reached, you are prompted to delete existing reminders.*

1. To view a reminder from the minimised **My Reminders** widget, click it to display the **Read Reminder** dialog. To access a bulletin from the maximised view of the **My Reminders** widget, highlight the required reminder then click the **Open** button to display the same dialog.

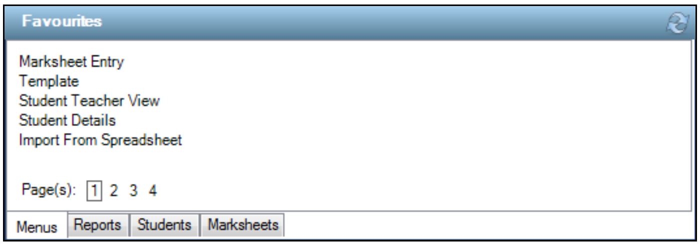
   

   When used in conjunction with the **Subject** of the reminder displayed in the **My Reminders** panel, the **Event Name** informs you of the purpose of the reminder.

2. Double-click a summary line in the dialog to navigate to the area in SIMS and view the full record. In the case of the SEN review reminder used in this example, the **Student SEN details** page is displayed.
3. Close the detail page to return to the SIMS **Home Page**.
4. With the **Read Reminder** dialog open, you can **Print** or **Delete** the reminder.
5. Click the **Close** button to retain the reminder and to return to the SIMS **Home Page**.

Viewing My Favourites

To facilitate navigation in SIMS to areas that you visit most frequently, SIMS monitors and records the most commonly accessed functional areas and provides them as shortcuts via the **Favourites** widget.



The following categories of functionality in SIMS can be added as shortcuts automatically via the **Favourites** widget:

- Menus (added to the **Menus** tab automatically when you open a menu route in SIMS)
- Reports (added to the **Reports** tab automatically when you drag a SIMS pre-defined report to the `Favourites` folder via **Reports | Run Report**)
- Students (added to the **Students** tab automatically when you open a pupil/student's details via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** then click the **Favourites** button)
- Marksheets (added to the **Marksheets** tab automatically when you open a marksheet via **Focus | Assessment | Marksheet Entry** then click the **Favourites** button).

Each of the tabs located at the bottom of the **Favourites** widget can display a maximum of five hyperlinks to functional areas in SIMS. Each tab can contain up to four pages, meaning that a maximum of 20 hyperlinks for each category can be stored. To view additional pages, click the appropriate **Page(s)** link. In the previous example, the **Menus** tab displays five hyperlinks on page 1 and provides four pages of links.

1. To open a shortcut, select the required tab (e.g. **Menus**) and click the required page (using the **Page(s)** links).
2. Either click the required shortcut or right-click it then select **Open '<shortcut name>'** to display the functional area.

The history of your navigation in SIMS can be removed by right-clicking any shortcut then selecting **Reset Counters** from the pop-up menu.

Viewing My Messages

All messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**. This includes system messages if a message that you have sent to another SIMS user cannot be delivered. The default refresh rate can be defined as part of the widget configuration process (please see *Configuring the My Messages Panel* on page *106*).

By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.

In addition, an alarm is played by default when a high priority message is received.

1. Click a message in the **My Messages** widget to display its details in the **Read Message** dialog.
2. **Print** or **Delete** the message, if required.
3. Click the **Close** button to retain the message and to return to the SIMS **Home Page**.

More Information:
Sending General Messages on page *45*
Viewing Sent Messages on page *48*
Deleting Sent Messages on page *49*
Responding to Messages on page *50*
Adjusting the Message Options for High Priority Messages on page *52*

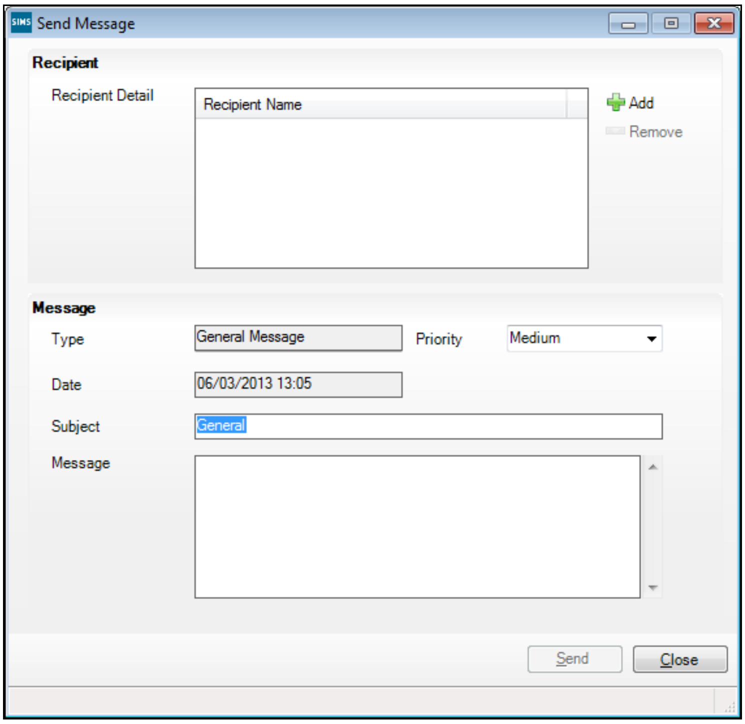
Sending General Messages

Messages can be sent to one or more SIMS users, perhaps to inform them of a forthcoming event.

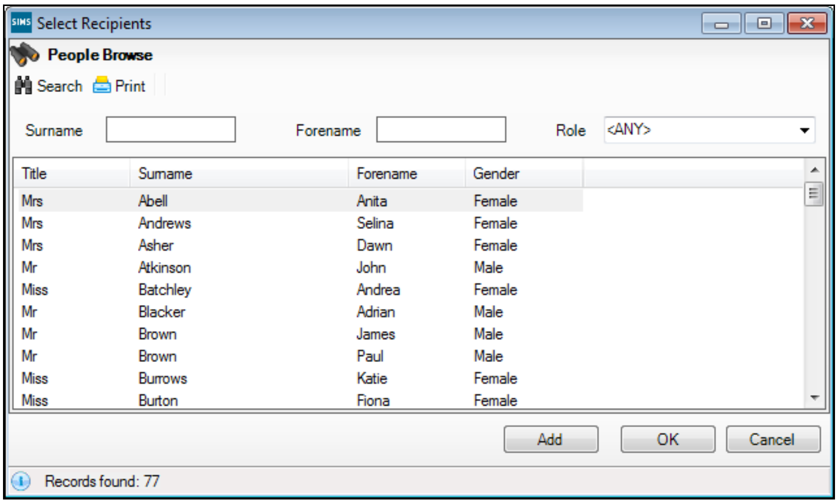
The type of message sent depends on the subject matter. For example, to send a message about a particular pupil/student, you can send a **Student General Message** from the **Links** panel in SIMS. Another type of message that can be sent is a **General** message. This type of message is not subject-specific, and should be used if existing message types (from the **Type** drop-down list in the **Message** panel of the **Send Message** dialog) are not appropriate. For example, you might want to send a message informing all heads of year of a forthcoming visit from a school inspector.

Once sent, the recipient can view messages in the **My Messages** panel of their Home Page.

1. Select **Focus | Alerts | General Messages** to display the **General Message** page.
2. Click the **New** button to display the **Send Message** dialog.



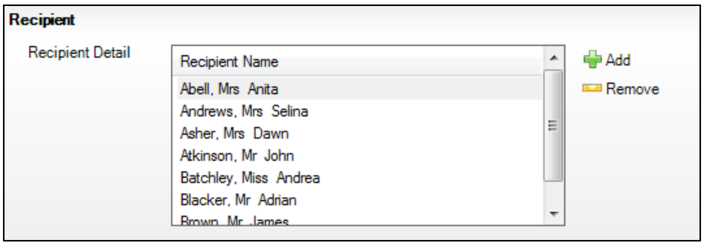
3. Click the **Add** button in the **Recipient** panel to display the **Select Recipients** browser.



4. Search for then highlight the required recipient (multiple recipients can be selected by either holding down the **Ctrl** key and clicking the required names, or holding the **Shift** key to select a block of recipients).
5. Click the **Add** button to add each person (or group of people).

6. When you have added the required member(s) of staff, click the **OK** button. The selected members of staff are displayed in the **Recipient** panel.

> *NOTE: To remove a member of staff, highlight their name in the **Recipient** panel then click the **Remove** button.*

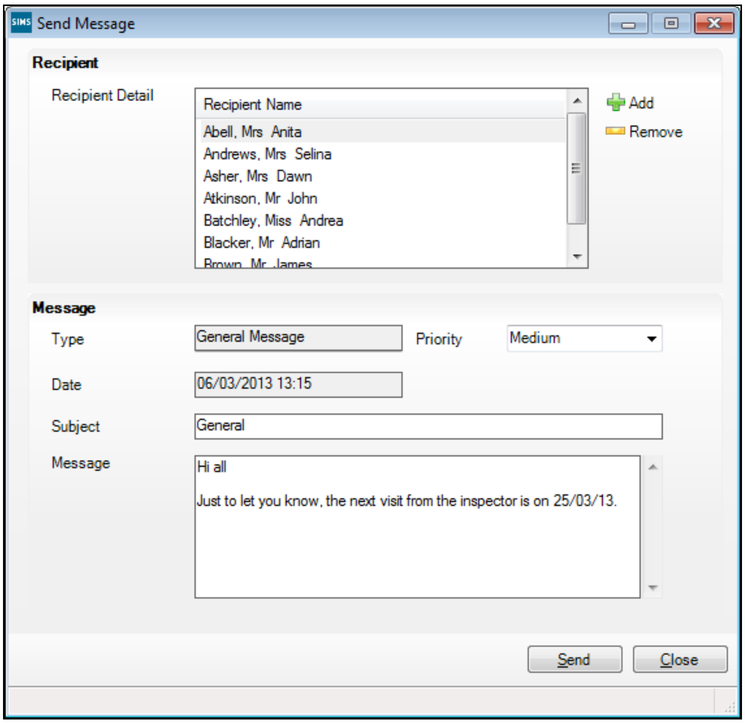


In the **Message** panel, the **Type** field displays **General Message** and cannot be edited.

7. Select the **Priority** of the message from the drop-down list. High priority messages are displayed in a pop-up window in the bottom right-hand corner of the recipient's screen, if this setting has been activated (please see *Adjusting the Message Options for High Priority Messages* on page *52*).

   The **Date** field is populated from a combination of the system date and time.

8. The **Subject** field displays **General** by default, but can be edited if required.
9. In the **Message** field, enter the message text that you want to send to the selected member(s) of staff.



When the required recipients have been selected and the **Message** field is populated, the **Send** button becomes available. To cancel the sending of the message, click the **Close** button.

10. Click the **Send** button to send the message. The message is displayed in the **My Messages** panel of the intended recipient(s).

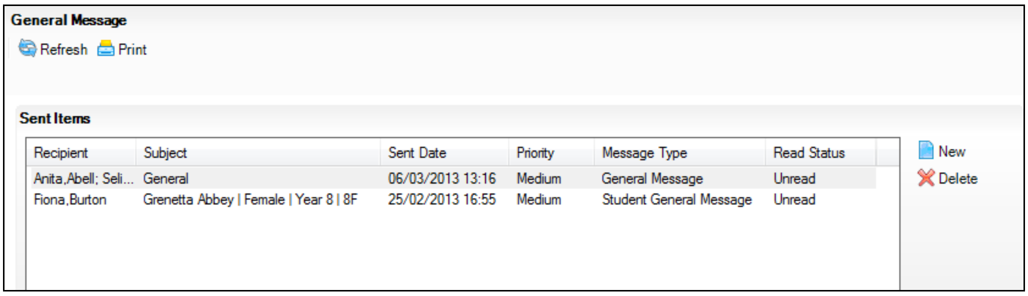
> *NOTE: All sent messages are stored in the **Sent Items** panel of the **General Message** page until they are deleted.*

More Information:
Deleting Sent Messages on page *49*

Viewing Sent Messages

All sent messages are stored in the **Sent Items** panel of the **General Message** page until they are deleted. It is possible to view and print the details of these messages.

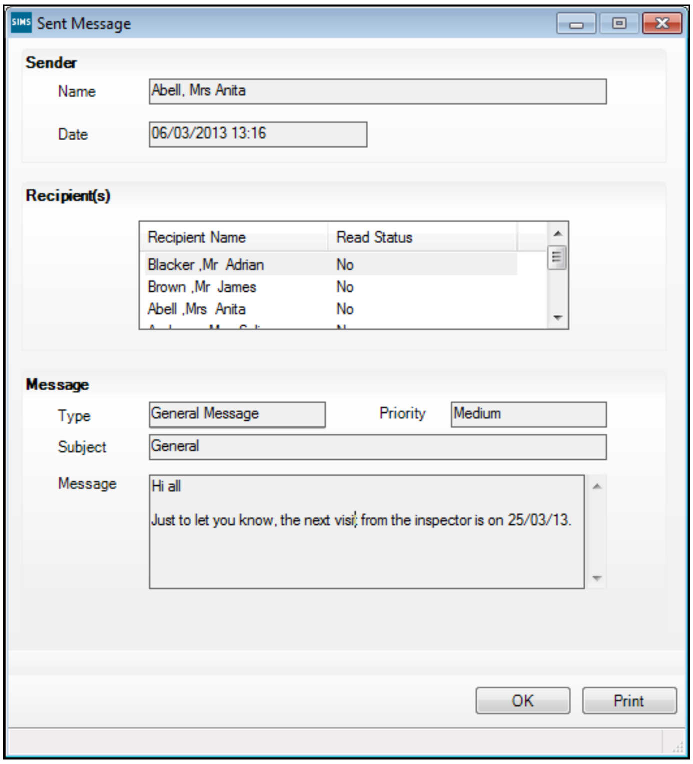
1. Select **Focus | Alerts | General Messages** to display the **General Message** page.



The **Sent Items** panel displays all of the messages that you have sent, which you have elected to retain.

The **Read Status** column indicates if the message is currently **Unread**, **Read** (by some, but not all of the recipients) or **Read By All**.

2. Double-click a message to view its details in the **Sent Message** dialog.



   The **Recipient(s)** panel displays all recipients of the message. The **Read Status** in this panel displays **Yes** if the recipient has read your message.

3. To print the message, click the **Print** button. Click the **OK** button to return to the **General Message** page.
4. To print all sent messages, click the **Print** button on the **General Message** page.

Deleting Sent Messages

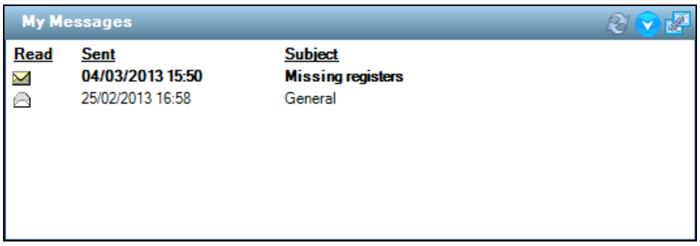
Any sent messages that you no longer need can be deleted.

> ***WARNING:*** *Deleted sent messages are removed permanently and there is no restore function. Any user to whom you have sent the message can still access it via the **My Messages** panel on their Home Page until they elect to delete it.*

1. Select **Focus | Alerts | General Messages** to display the **General Message** page.
2. Highlight the required message(s) then click the **Delete** button. Multiple messages can be selected by holding the **Ctrl** key then clicking each message you wish to delete.
3. Confirm the deletion by clicking the **Yes** button.

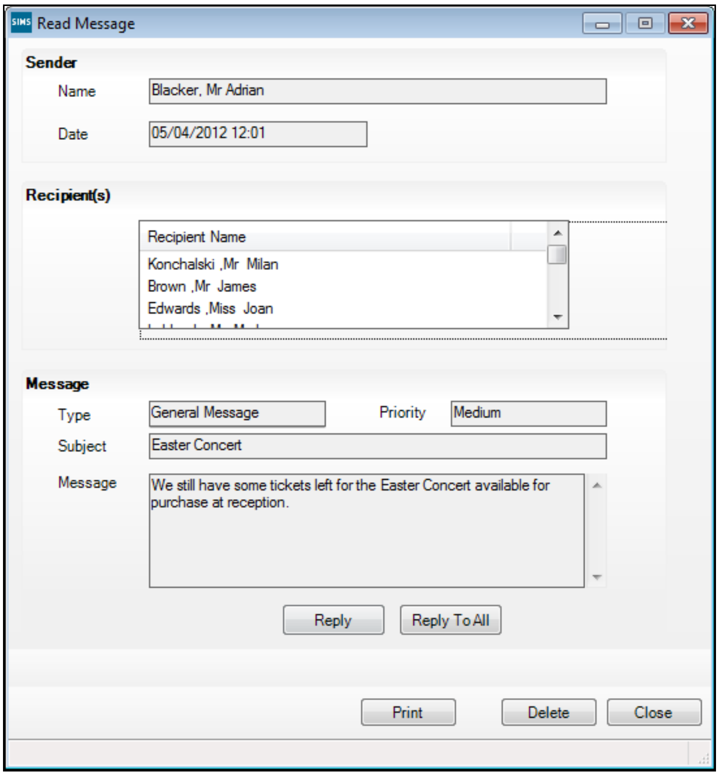
Responding to Messages

The six most recent messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**.



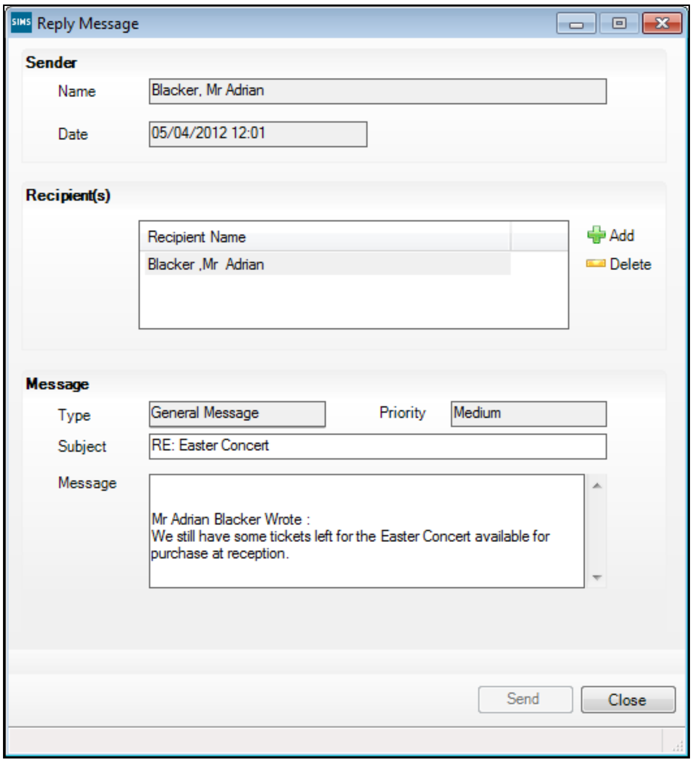
> *NOTE: If the number of messages in your inbox exceeds the number that can be displayed in the **My Messages** widget, the **More** hyperlink enables access to the additional messages in full screen mode.*

1. Click anywhere on the required message line to display the content of the message in the **Read Message** dialog.

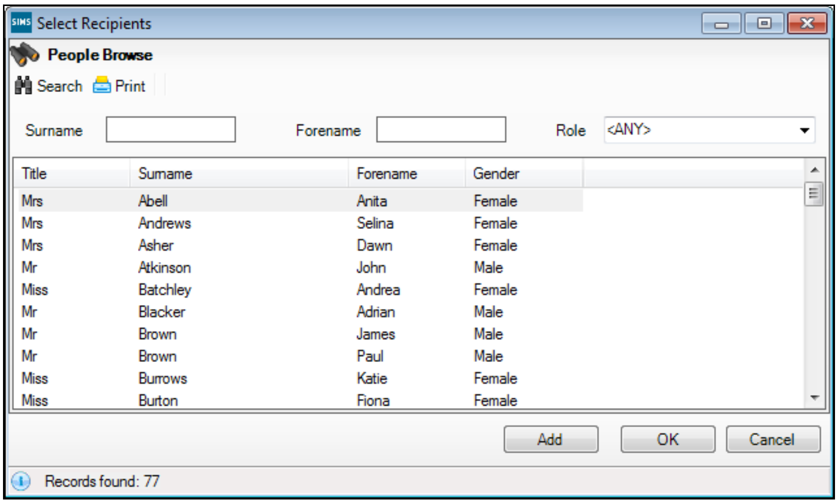


> *NOTE: **Print** or **Delete** the message as required or click the **Close** button to retain the message and return to the SIMS **Home Page**.*

2. To respond only to the sender of the message, click the **Reply** button to display the **Reply Message** dialog. Alternatively, click the **Reply To All** button to respond to all recipients of the original message, including the sender.



3. Click the **Add** button in the **Recipient(s)** panel to display the **Select Recipients** browser.



4. Search for, then select the required recipient (multiple recipients can be selected by either holding down the **Ctrl** key and clicking the required names, or holding the **Shift** key to select a block of recipients).
5. Click the **Add** button to add each person (or group of people).

6. When you have added the necessary members of staff, click the **OK** button. The selected members of staff are displayed in the **Recipient** panel.

   *NOTE: To remove a member of staff, highlight them in the **Recipient** panel and click the **Remove** button.*

7. Enter your reply in the **Message** panel and click the **Send** button to send the message.

Adjusting the Message Options for High Priority Messages

Any messages sent to you by other SIMS users are displayed in the **My Messages** panel on the SIMS **Home Page**. By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.

In addition, an alarm is played by default when a high priority message is received.

NOTE: Each SIMS user can define their own settings for when they receive a high priority message. The settings defined apply only to that user and only to messages received by that user. Therefore, if you send a high priority message to another SIMS user, the pop-up window displays on their screen only if the recipient has defined this setting.

1. Select **Tools | Setup Message Options** to display the **Setup Message Options** page.

   By default, all the options are selected and the pop-up alert is displayed for 30 seconds

2. Deselect the **Display an alert when a new message is received** check box to de-activate the pop-up display for high priority messages.

   By default, the **Duration pop-up alert will be displayed** for **30 seconds**. This determines the period of time that the pop-up message remains on-screen.

3. To amend the length of time that the pop-up message is displayed, enter the required time, in seconds.

4. Deselect the **Play a sound alarm** check box to de-activate the sound prompt when the pop-up high priority alert is displayed.

> *NOTE: To receive the pop-up alerts for high priority messages, the **My Messages** widget must be displayed on your **Home Page**.*

Refreshing the Content of the My Messages Widget

Many of the widgets on the SIMS Home Page can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **My Messages** widget manually.

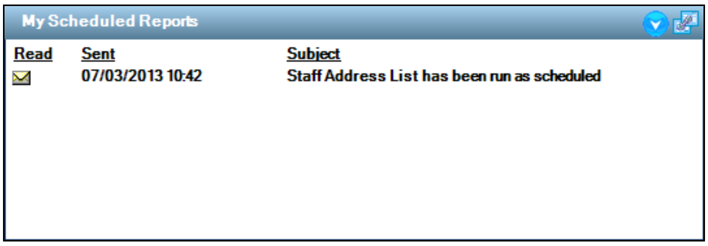
Click the **Refresh** button in the **My Messages** widget to refresh its content.

 *Refresh button*

Viewing My Scheduled Reports

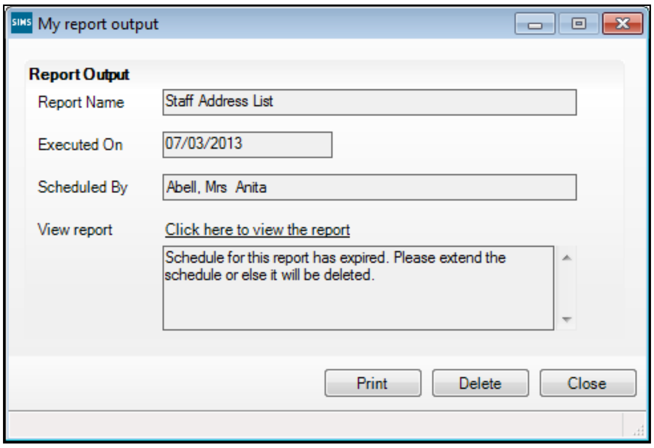
The **My Scheduled Reports** widget is used to display any reports that you have scheduled to run automatically at specified times. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any behaviour incidents. It is possible to schedule these reports to run for yourself and on behalf of other SIMS users.

Once generated, the reports are stored on the Document Management Server (DMS) and a link to the report is displayed in the **My Scheduled Reports** widget on the SIMS **Home Page**.



> *NOTE: If the number of scheduled reports that have been run exceeds the number that can be displayed in the **My Scheduled Reports** widget, the **More** hyperlink enables access to the additional reports in full screen mode.*

To access a report from the minimised **My Scheduled Reports** widget, click the name of the report to display the **My report output** dialog. To access a report from the maximised view of the **My Scheduled Reports** widget, highlight the required report then click the **Open** button to display the same dialog.



The **Report Name** and the date the report was **Executed On** are displayed, together with the name of the user who scheduled the report (**Scheduled By**).

To view the report output, click the **Click here to view the report** hyperlink to open the application associated with the selected report format, from where it can be printed.

Click the **Print** button to print the information in the dialog, if required. The notification can be deleted from the **My Scheduled Report** widget by clicking the **Delete** button.

Click the **Close** button to return to the SIMS **Home Page**.

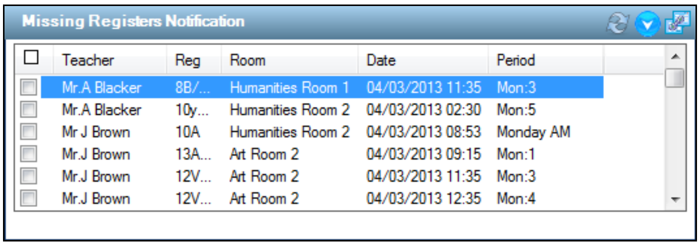
Additional Resources:

Running Scheduled Reports chapter of the *Designing and Running Reports* handbook

Viewing Missing Register Notifications

This section is applicable only to users with Attendance Manager permissions.

It is possible to display a list of registers that have not been completed within a specified number of minutes after a lesson or session starts. The period of time after which notifications will be displayed is defined as part of the widget configuration process (please see *Configuring the Missing Register Notification Panel* on page *107*). It is also possible to access the registers to complete missing marks, if required.



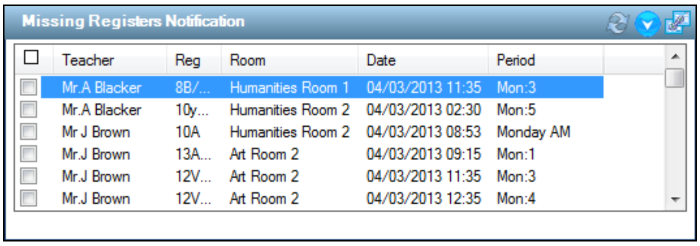
The **Missing Registers Notification** widget displays any registers that have not been completed after a defined period of time (e.g. 10 minutes after a lesson or session starts). Any missing or incomplete register is displayed in this panel. The panel displays details of the registration tutor/class teacher, the session or lesson, the room, date and period.

This functionality enables a Head of Year (with Attendance Manager permissions), for example, to identify any sessions or lessons that have not had their registration taken within the required time period. The Head of Year can then send a message to all members of staff who have not yet completed their register.

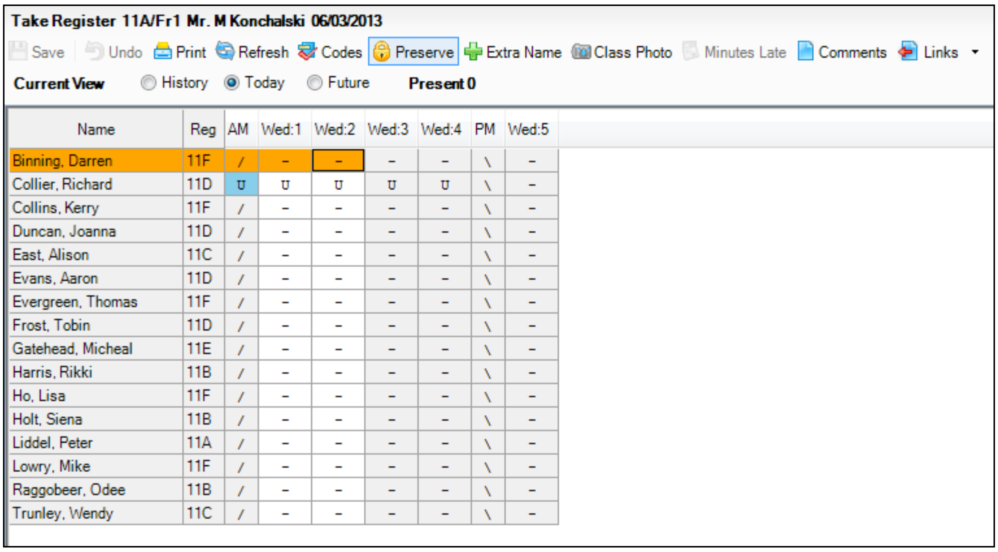
IMPORTANT NOTE: *By default, the content of the* ***Missing Registers Notification*** *panel is refreshed automatically by SIMS every ten minutes. This means that if missing register notifications are set to be sent ten minutes after a lesson or session starts, the delay before the* ***Missing Registers Notification*** *panel displays this information may be up to twenty minutes after the lesson or session starts. It is important to bear this in mind when setting the notification delay.*

Opening a Register and Entering Marks

It is possible to open the registers displayed in the **Missing Registers Notification** widget, perhaps if you want to complete missing marks.



Double-click the required register in the **Missing Registers Notification** widget to display the **Take Register** page.


Take Register 11A/Fr1 Mr. M Konchalski 06/03/2013
Save Undo Print Refresh Codes Preserve Extra Name Class Photo Minutes Late Comments Links
Current View History Today Future Present 0

Name	Reg	AM	Wed:1	Wed:2	Wed:3	Wed:4	PM	Wed:5
Binning, Darren	11F	/	-	-	-	-	\	-
Collier, Richard	11D	U	U	U	U	U	\	-
Collins, Kerry	11F	/	-	-	-	-	\	-
Duncan, Joanna	11D	/	-	-	-	-	\	-
East, Alison	11C	/	-	-	-	-	\	-
Evans, Aaron	11D	/	-	-	-	-	\	-
Evergreen, Thomas	11F	/	-	-	-	-	\	-
Frost, Tobin	11D	/	-	-	-	-	\	-
Gatehead, Micheal	11E	/	-	-	-	-	\	-
Harris, Rikki	11B	/	-	-	-	-	\	-
Ho, Lisa	11F	/	-	-	-	-	\	-
Holt, Siena	11B	/	-	-	-	-	\	-
Liddel, Peter	11A	/	-	-	-	-	\	-
Lowry, Mike	11F	/	-	-	-	-	\	-
Raggobeer, Odee	11B	/	-	-	-	-	\	-
Trunley, Wendy	11C	/	-	-	-	-	\	-

Additional Resources:

Taking a Register chapter in the *Managing Pupil/Student Attendance* handbook
Taking a Register chapter in the *Monitoring Session and Lesson Attendance* handbook

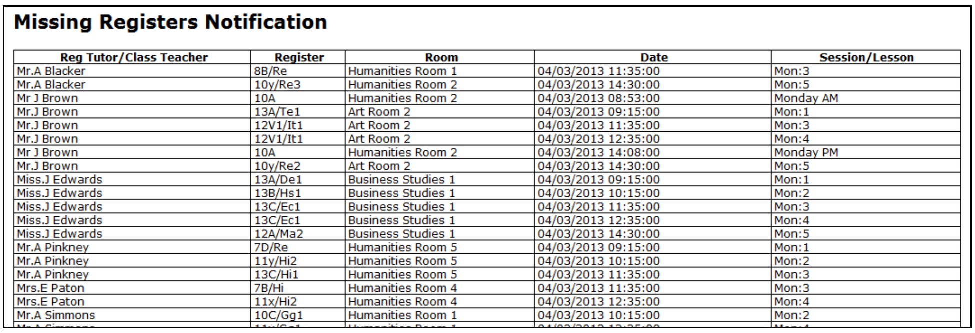
Printing Missing Register Notifications

The content of the **Missing Registers Notification** widget can be printed.

The printed output produces the view of the **Missing Registers Notification** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **Missing Registers Notifications** widget prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the notifications in your web browser.


Options button


Missing Registers Notification

Reg Tutor/Class Teacher	Register	Room	Date	Session/Lesson
Mr.A Blacker	8B/Re	Humanities Room 1	04/03/2013 11:35:00	Mon:3
Mr.A Blacker	10y/Re3	Humanities Room 2	04/03/2013 14:30:00	Mon:5
Mr J Brown	10A	Humanities Room 2	04/03/2013 08:53:00	Monday AM
Mr.J Brown	13A/Te1	Art Room 2	04/03/2013 09:15:00	Mon:1
Mr.J Brown	12V1/It1	Art Room 2	04/03/2013 11:35:00	Mon:3
Mr.J Brown	12V1/It1	Art Room 2	04/03/2013 12:35:00	Mon:4
Mr J Brown	10A	Humanities Room 2	04/03/2013 14:08:00	Monday PM
Mr.J Brown	10y/Re2	Art Room 2	04/03/2013 14:30:00	Mon:5
Miss.J Edwards	13A/De1	Business Studies 1	04/03/2013 09:15:00	Mon:1
Miss.J Edwards	13B/Hs1	Business Studies 1	04/03/2013 10:15:00	Mon:2
Miss.J Edwards	13C/Ec1	Business Studies 1	04/03/2013 11:35:00	Mon:3
Miss.J Edwards	13C/Ec1	Business Studies 1	04/03/2013 12:35:00	Mon:4
Miss.J Edwards	12A/Ma2	Business Studies 1	04/03/2013 14:30:00	Mon:5
Mr.A Pinkney	7D/Re	Humanities Room 5	04/03/2013 09:15:00	Mon:1
Mr.A Pinkney	11y/Hi2	Humanities Room 5	04/03/2013 10:15:00	Mon:2
Mr.A Pinkney	13C/Hi1	Humanities Room 5	04/03/2013 11:35:00	Mon:3
Mrs.E Paton	7B/Hi	Humanities Room 4	04/03/2013 11:35:00	Mon:3
Mrs.E Paton	11x/Hi2	Humanities Room 4	04/03/2013 12:35:00	Mon:4
Mr.A Simmons	10C/Gg1	Humanities Room 1	04/03/2013 10:15:00	Mon:2

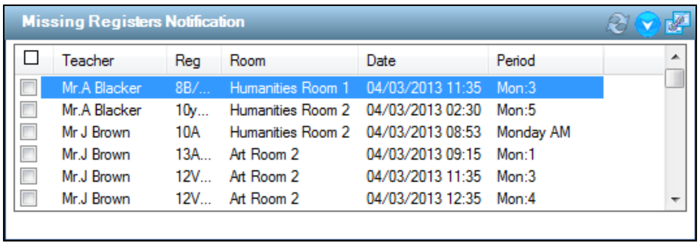
2. Click the **Print** button to print the notifications.

Sending a Missing Register Notification Message

This section is applicable only to users with Attendance Manager permissions.

The **Missing Registers Notification** widget enables a Head of Year (with Attendance Manager permissions), for example, to identify any sessions or lessons that have not had their register taken within the required time period. The Head of Year can then send a high priority message to all members of staff who have not yet completed their register, prompting them to do so.

The period of time after which notifications will be displayed in the **Missing Registers Notification** widget is defined as part of the widget configuration process (please see *Configuring the Missing Register Notification Panel* on page *107*).



1. Select the check box relating to the register(s) for which you want to send the notification message. Alternatively, select the check box in the header row to select all missing registers displayed in the **Missing Registers Notification** widget.
2. Click the **Options** button then select **Send Message** from the pop-up menu to display the notifications in your web browser.

 *Options button*

If the message has been sent successfully, a message is displayed at the bottom of the **Missing Registers Notification** widget.

The recipient can view the notification via the **My Messages** widget on the SIMS **Home Page**. By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.

In addition, an alarm is played by default when a high priority message is received.

NOTE: Each SIMS user can define their own settings for when they receive a high priority message. The settings defined apply only to that user and only to messages received by that user. Therefore, if you send a high priority message to another SIMS user, the pop-up window displays on their screen only if the recipient has defined this setting.

More Information:
Adjusting the Message Options for High Priority Messages on page *52*

Refreshing the Content of the Missing Registers Notification Widget

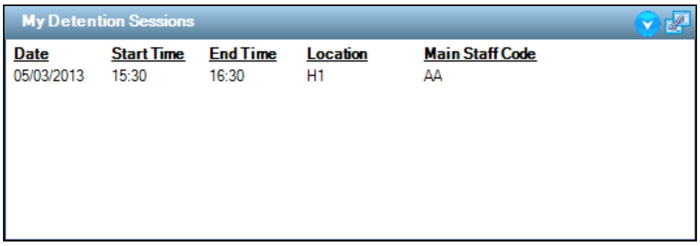
Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **Missing Registers Notifications** widget manually.

Click the **Refresh** button in the **Missing Registers Notifications** widget to refresh its content.

 *Refresh button*

Viewing My Detention Sessions

Any detention sessions for which you are the main staff member assigned are displayed in the **My Detention Sessions** widget. The period over which data is displayed (e.g. **Today**, **Current Week**, etc.) is defined as part of the widget configuration process (please see *Configuring the My Detention Sessions Panel* on page *108*).



Click the required detention session to display its details on the **Detention Details** page.

Additional Resources:

Adding/Editing Detentions in the *Recording Detentions* chapter of the *Managing Pupil/Students* handbook

Printing My Detention Sessions

The content of the **My Detention Sessions** widget can be printed.

The printed output produces the view of the **My Detention Sessions** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **My Detention Sessions** widget and ensure the correct scope (e.g. **Today**, **Current Week**, etc.) is selected prior to printing (please see *Refreshing the Content of the School Diary Widget* on page *41*).

1. Click the **Options** button then select **Print** from the pop-up menu to display the detention sessions in your web browser.

 *Options button*

My Detention Sessions

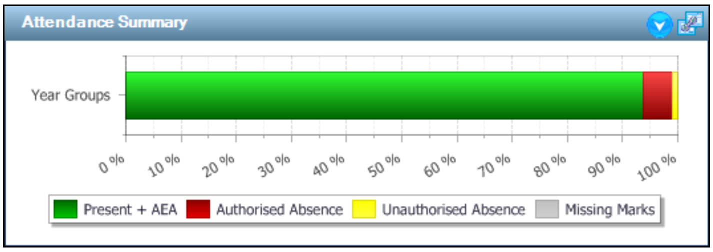
Date	Start Time	End Time	Location	Main Staff Code
05/03/2013	15:30	16:30	H1	AA

2. Click the **Print** button to print the detention sessions.

Viewing the Attendance Summary

A summary of pupil/student attendance can be displayed in the **Attendance Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress. The attendance information displayed is defined as part of the widget configuration process (please see *Configuring the Attendance Summary Panel* on page *109*).

The following example shows the **Attendance Summary** widget when all **Year Groups** have been selected.

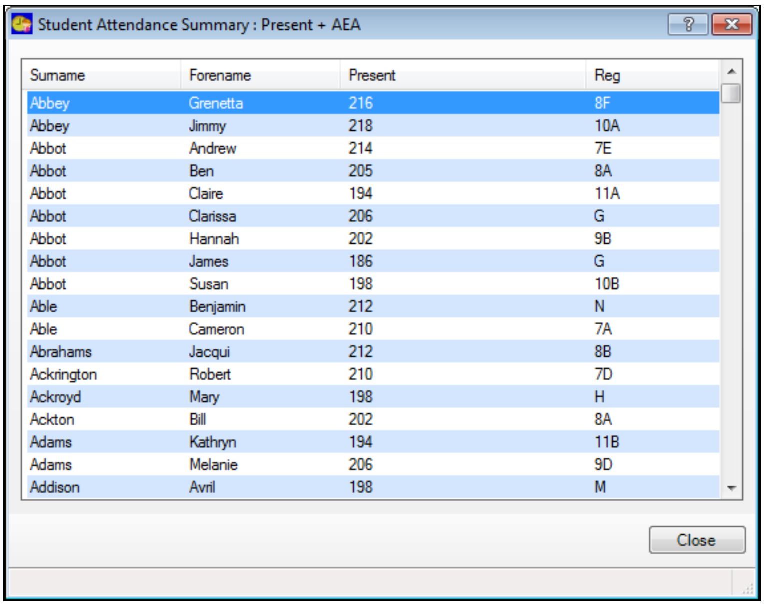


Pupil/student attendance for the selected group(s) over the course of the current academic year is displayed on a vertical bar chart. The legend beneath the chart displays the scope of the chart, which is the display of all **Present + AEA** (Authorised Educational Activity) marks, together with **Authorised** and **Unauthorised** absences and **Missing Marks**. The horizontal axis displays the cumulative percentage of these marks, starting with a green bar (for present marks), a yellow bar (authorised absences) and a red bar (unauthorised absences).

The percentage attendance figure is calculated as follows:

Percentage Attendance = <number of present marks> plus <number of approved educational absence marks> divided by <number of possible marks>

Hover the mouse over the bar to display the number and percentage of sessions or lessons in each category. To view the data that makes up the present, authorised or unauthorised bars on the chart, double-click the required bar to display the **Student Attendance Summary** dialog. In the following graphic, the **Present + AEA** (green) bar was selected to display the **Student Attendance Summary: Present + AEA** dialog.



Surname	Forename	Present	Reg
Abbey	Grenetta	216	8F
Abbey	Jimmy	218	10A
Abbot	Andrew	214	7E
Abbot	Ben	205	8A
Abbot	Claire	194	11A
Abbot	Clarissa	206	G
Abbot	Hannah	202	9B
Abbot	James	186	G
Abbot	Susan	198	10B
Able	Benjamin	212	N
Able	Cameron	210	7A
Abrahams	Jacqui	212	8B
Ackrington	Robert	210	7D
Ackroyd	Mary	198	H
Ackton	Bill	202	8A
Adams	Kathryn	194	11B
Adams	Melanie	206	9D
Addison	Avril	198	M

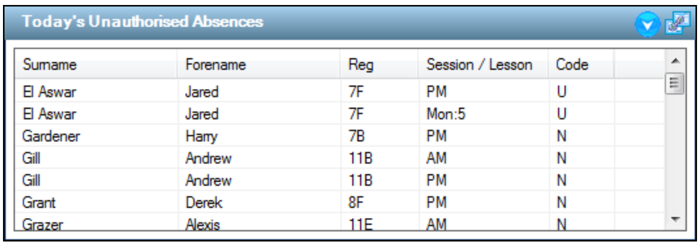
The number of present and authorised educational activity marks (or authorised or unauthorised absence marks, depending on the part of the bar chart that was selected) is displayed. You can access more specific data by right-clicking the required pupil/student then selecting **Student Teachers View** or **Student Attendance Summary** from the pop-up menu.

Additional Resources:

Configuring and Using the Student Teacher View mini guide
Displaying Marks chapter of the *Managing Pupil/Student Attendance* handbook
Displaying Marks chapter of the *Monitoring Session and Lesson Attendance* handbook

The data used to build the unauthorised absence part of the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

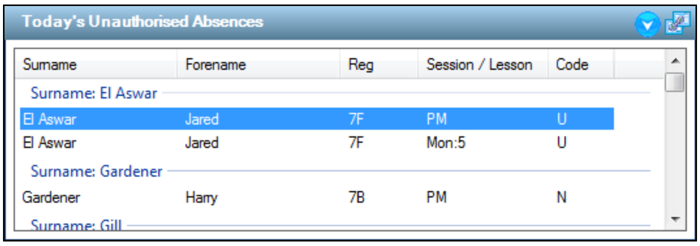
 *Options button*



Surname	Forename	Reg	Session / Lesson	Code
El Aswar	Jared	7F	PM	U
El Aswar	Jared	7F	Mon:5	U
Gardener	Harry	7B	PM	N
Gill	Andrew	11B	AM	N
Gill	Andrew	11B	PM	N
Grant	Derek	8F	PM	N
Grazer	Alexis	11E	AM	N

The data displays unauthorised absences recorded for today <u>only</u>. The **Session/Lesson** for which an unexplained absence mark has been recorded and the actual mark recorded (**Code**) are displayed for each pupil/student. Where multiple session/lessons have been recorded for a pupil/student, a new line is displayed for each session/lesson.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Today's Unauthorised Absences** widget then select **Surname**, **Forename**, **Reg**, **Session/Lesson** or **Code** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

> ***IMPORTANT NOTES:*** *Authorised educational activity marks are treated as a present mark in the **Attendance Summary** widget on the SIMS **Home Page**.*
>
> *If a mark is entered in Take Register for a future session or lesson, this is included in the figures in the **Attendance Summary** widget.*

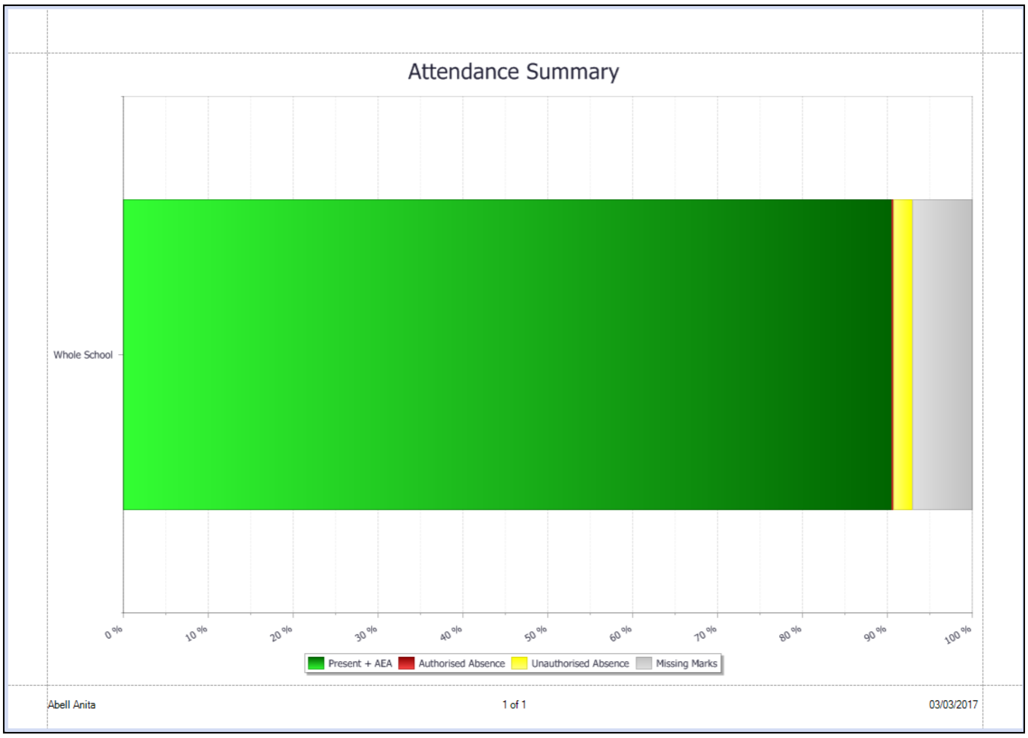
Printing the Attendance Summary

Two printed outputs are available from this widget. With the **Attendance Summary** displayed, the bar chart is printed. With **Today's Unauthorised Absences** displayed, the data is printed in surname then forename order, regardless of the display order on-screen.

Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser, from where it can be printed.

 *Options button*

Attendance Summary bar chart output:



Today's Unauthorised Absences output:

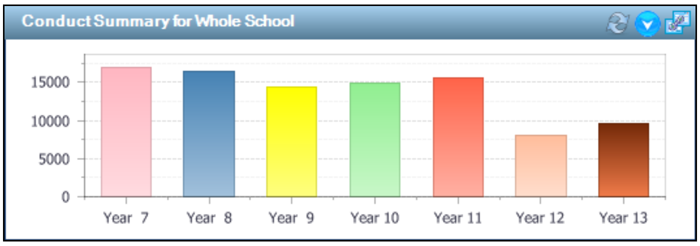
Attendance Summary

Surname	Forename	Reg. Group	Session / Lesson	Code
Aaron	Chris	3CB	PM	N
Aaron	Chris	3CB	AM	N
Aaron	Liz	3CB	AM	N
Aaron	Liz	3CB	PM	N
Adasheji	Mohammed	3CB	PM	N
Adasheji	Mohammed	3CB	AM	N
Americana	Kari	5DT	AM	N
Americana	Kari	5DT	PM	N
Amoso	Silv	6KH	PM	N
Amoso	Silv	6KH	AM	N
Amoso	Stephanie	6KH	PM	N
Amoso	Stephanie	6KH	AM	N
Atkinson	Ben	6KH	PM	N
Atkinson	Ben	6KH	AM	N
Avatar	Ahman	3CB	AM	N
Avatar	Ahman	3CB	PM	N
Ballinger	Eden	5BB	PM	N
Ballinger	Eden	5BB	AM	N
Brown	Jeremy	6KH	PM	N
Brown	Jeremy	6KH	AM	N
Carlin	Tayla	6KH	AM	N
Carlin	Tayla	6KH	PM	N
DiMonaco	Silvana	OAK	PM	N
DiMonaco	Silvana	OAK	AM	N
Douglas	David	6KH	PM	N
Douglas	David	6KH	AM	N
Fell	Mia	3CB	PM	N
Fell	Mia	3CB	AM	N
Francis	Adam	2GH	AM	N

Viewing the Conduct Summary

A summary of pupil/student conduct can be displayed in the **Conduct Summary** widget on the SIMS **Home Page**, enabling the monitoring of behaviour and achievement. The conduct information displayed, together with the period over which data is displayed (e.g. **Year to Date**, **Previous Week**, etc.), is defined as part of the widget configuration process (please see *Configuring the Conduct Summary Panel* on page *112*).

The previous example shows the **Conduct Summary** widget when the **Whole School** has been selected for the **Previous Term**.



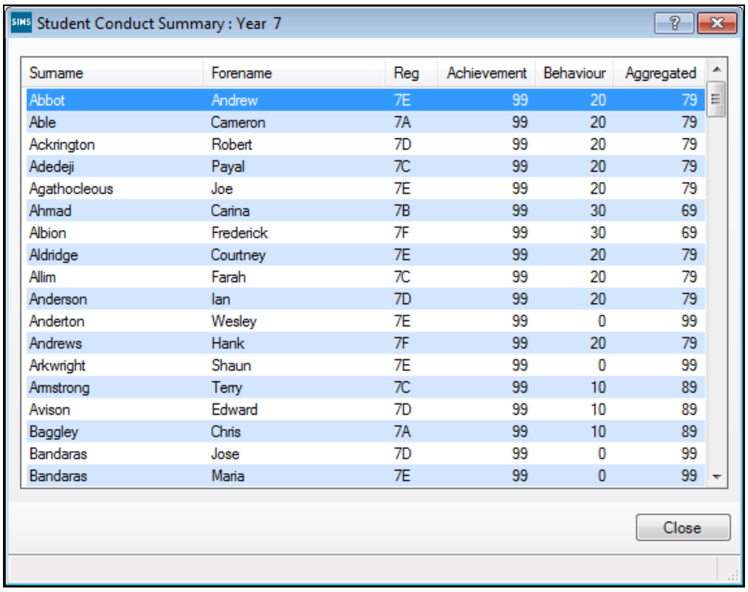
The data in the chart consists of the aggregate of the points awarded for behaviour incidents (awarded a negative points value) and achievements (awarded a positive points value). Where the points awarded for achievements exceeds the points awarded for behaviour incidents), this indicates generally positive conduct for the group and the bar is displayed above the horizontal axis (i.e. a points aggregate of greater than 0).

The scope of the **Conduct Summary** widget determines the style of the bar chart. In the previous graphic, the vertical axis starts at zero and the last marker is at 15000. All of the bars on the chart are within the range 0 to 15000 so this indicates generally positive conduct.

If the scope of the widget was reduced to display conduct for a single day (**Today** or **Previous Day**), one of the groups that you are monitoring (perhaps a specific registration group) might display a negative aggregate score (the points awarded for behaviour incidents exceeds the points awarded for achievements). Under these circumstances, the bar would be displayed below the horizontal axis (i.e. a points aggregate of less than 0) to indicate generally negative conduct.

Hover the mouse over a bar to display the number of conduct points for the selected group(s). The information displayed differs depending on the groups selected. For example, if you have chosen a **Whole School** view, hovering the mouse over a bar displays the aggregate conduct points for each year group. Hovering the mouse over a bar on the widget where you have chosen to display a single year group displays (in a secondary school) the aggregate conduct points for each registration group in the year.

To view the data that makes up a bar displayed in the widget, double-click the required bar to display the **Pupil** (or **Student**) **Conduct Summary** dialog. In the following graphic, the **Year 7** bar was selected to display the **Pupil** (or **Student**) **Conduct Summary: Year 7** dialog.



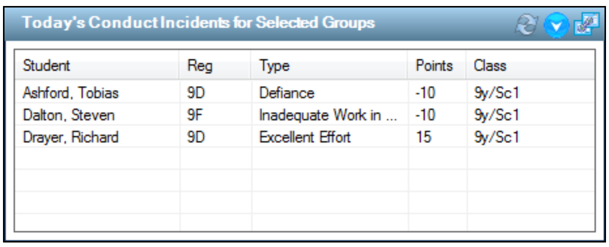
Surname	Forename	Reg	Achievement	Behaviour	Aggregated
Abbot	Andrew	7E	99	20	79
Able	Cameron	7A	99	20	79
Ackrington	Robert	7D	99	20	79
Adedeji	Payal	7C	99	20	79
Agathocleous	Joe	7E	99	20	79
Ahmad	Carina	7B	99	30	69
Albion	Frederick	7F	99	30	69
Aldridge	Courtney	7E	99	20	79
Allim	Farah	7C	99	20	79
Anderson	Ian	7D	99	20	79
Anderton	Wesley	7E	99	0	99
Andrews	Hank	7F	99	20	79
Arkwright	Shaun	7E	99	0	99
Armstrong	Terry	7C	99	10	89
Avison	Edward	7D	99	10	89
Baggley	Chris	7A	99	10	89
Bandaras	Jose	7D	99	0	99
Bandaras	Maria	7E	99	0	99

The number of **Achievement** and **Behaviour** points are displayed for each pupil/student in the selected group, together with an **Aggregated** figure. The **Aggregated** figure equals the number of **Achievement** points minus the number of **Behaviour** points.

You can access more specific data by right-clicking the required pupil/student then selecting **Student Teachers View** or **Student Conduct Summary** (which displays its details on the **Behaviour Management** page) from the pop-up menu. Alternatively, click the **Close** button to return to the SIMS **Home Page**.

The view of the data on the **Conduct Summary** widget can be toggled between a bar chart and a data table that displays **Today's Conduct Incidents for Selected Groups** (behaviour incidents and achievements) by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

 *Options button*

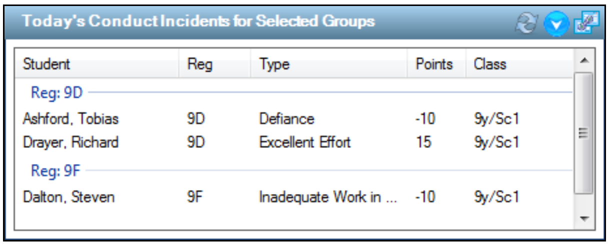


Student	Reg	Type	Points	Class
Ashford, Tobias	9D	Defiance	-10	9y/Sc1
Dalton, Steven	9F	Inadequate Work in ...	-10	9y/Sc1
Drayer, Richard	9D	Excellent Effort	15	9y/Sc1

The data displays pupil/student conduct information recorded today only. The **Type** of conduct that has been recorded is displayed for each pupil/student. The **Class** column displays the class in which the incident took place. Where multiple conduct details have been recorded for a pupil/student, a new line is displayed for each conduct item.

To view further information about a conduct incident, double-click the required item to display the **Pupil/Student Teacher View** page.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Today's Conduct Incidents for Selected Groups** view of the **Conduct Summary** widget, then select **Pupil** (or **Student**), **Reg**, **Type**, **Points** or **Class** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

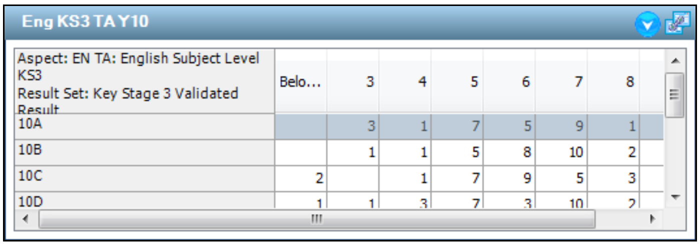
Additional Resources:

Recording Behaviour Incidents chapter of the *Managing Pupil/Students* handbook
Recording Achievements chapter of the *Managing Pupil/Students* handbook
Configuring and Using the Student Teacher View mini guide

Viewing the Assessment Summary

A summary of pupil/student assessments can be displayed in the **Assessment Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress. The assessment information displayed is defined as part of the widget configuration process (please see *Configuring the Assessment Summary Panel* on page *115*).

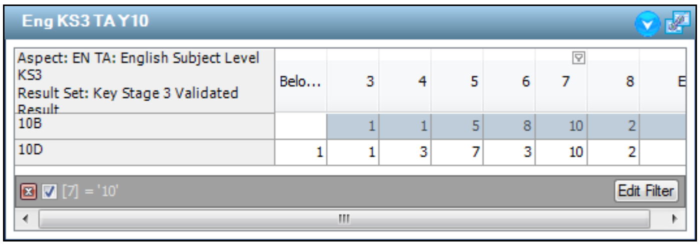
The following example shows the **Assessment Summary** widget when the EN TA: English Subject Level KS3 aspect and all the registration groups in year 10 are selected.



> *TIP: If you have selected to display more than three groups, or if you have selected an aspect with more than seven grades, you are advised to view the data in full screen mode.*
>
> *The widget name is renamed according to the selected analysis.*

The sort order of the Assessment Summary widget can be changed by clicking the required column header.

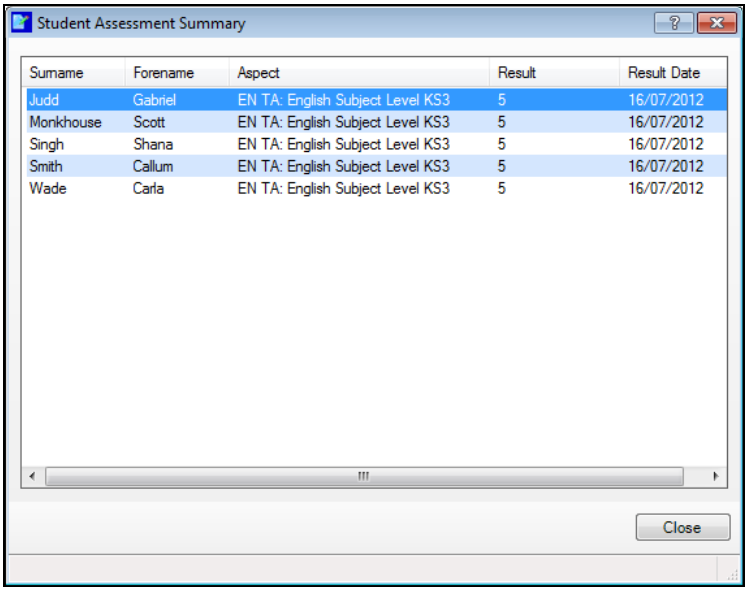
A filter can be applied to the data to display specific results. In the previous graphic for example, registration groups with 10 pupil/students who have achieved a grade 7 for the selected aspect can be displayed by hovering over the grade 7 column heading, clicking the **Filter** icon that is displayed in the top-right hand corner of the column heading (as displayed in the following graphic) then selecting **10** from the list.



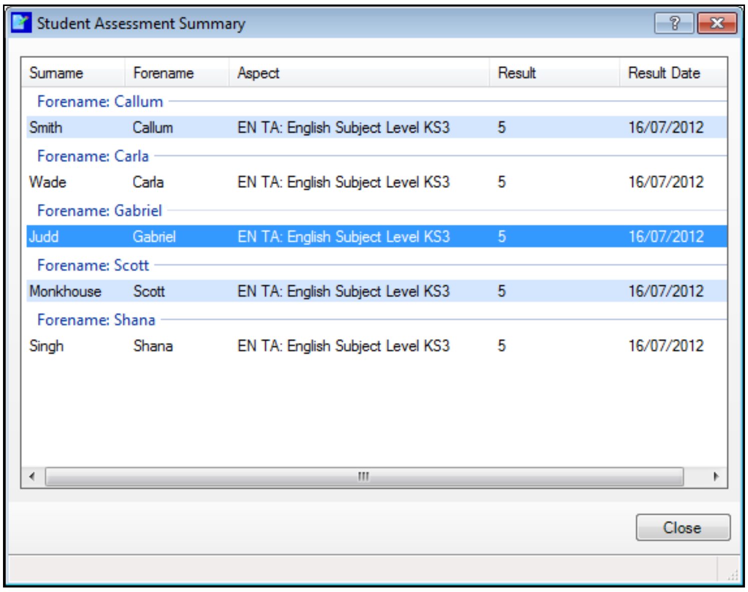
Additional Resources:

For full instruction on adding, editing and removing filters, please refer to *Using the Filter Editor* in the *Entering and Reviewing Data using Marksheets* chapter of the *Administering Assessment* handbook.

You can see which pupil/students have achieved a particular grade by double-clicking the required grade cell to display the **Student Assessment Summary** dialog.



This information can be viewed in a variety of display orders. Right-click anywhere in the dialog then select **Surname**, **Forename**, **Aspect**, **Result** or **Result Date** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the dialog then selecting **Hide Groups** from the pop-up menu.

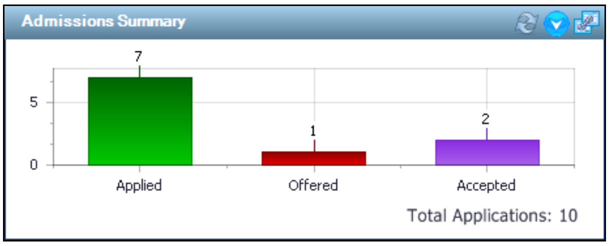
Double-click the required pupil/student to view more specific data and to display their **Pupil (or Student) Teacher View** page.

Click the **Close** button to return to the SIMS **Home Page**.

Viewing the Admissions Summary

A summary of your applicants by **Application Status** can be displayed in the **Admissions Summary** widget on the SIMS **Home Page**, enabling a quick overview of the figures in bar chart format. The admissions information displayed is defined as part of the widget configuration process (please see *Configuring the Admissions Summary Panel* on page *116*). This is a multi-use panel, i.e. you can have several **Admissions Summary** widgets displaying different information on the SIMS **Home Page**.

The following graphic shows an example of a populated **Admissions Summary** widget.



NOTE: Schools with relevant licences can also display ***Prospective Pupils*** *(or* ***Students****) or* ***Enquiries****.*

The horizontal axis displays the different admission statuses, while the vertical axis displays the numbers.

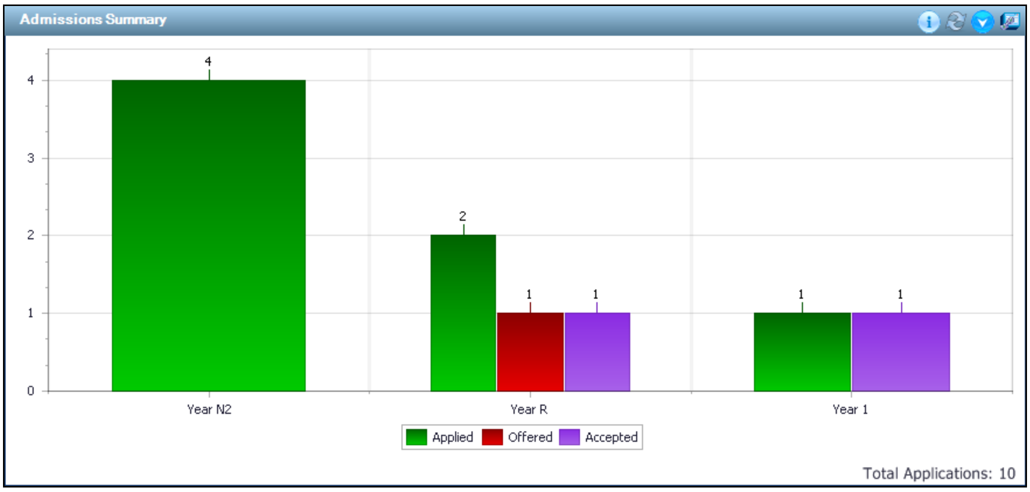
A **Total Applications** number is also displayed, which is the sum of the **Applied**, **Offered** and **Accepted** application statuses. This figure does not include **Prospective Pupils** (or **Students**) or **Enquiries**.

Clicking the **Options** button, then selecting **Toggle** from the drop-down menu enables you to turn the comparison view on and off, so that you can see the variation in application numbers between two time periods.

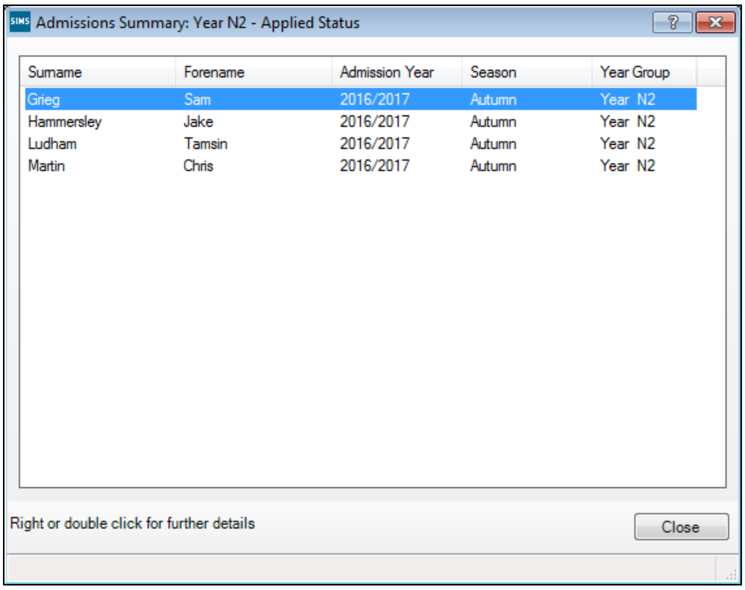
NOTE: The Toggle feature is enabled only if a comparison period has been selected in the Configuration Settings (please see Configuring the Admissions Summary Panel *on page* 116*).*

 *Options button*

An expanded chart can be viewed, which displays application statuses by year group and, like the collapsed view, can be toggled to the comparison view.



Hovering the cursor over each bar displays the number of each application status. Double-clicking a bar in the chart displays the **Admissions Summary** dialog, which gives details of the applicants in that category. Double-click an applicant's name to display the **Application** page, where more in-depth information about the selected application is displayed. If you have the required licences, the same can be achieved for **Enquiries** and **Projected Pupils** (or **Students**).



Printing the Admissions Summary

The content of the **Admissions Summary** widget can be printed.

The printed output produces the view of the **Admissions Summary** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **Admissions Summary** widget and ensure the correct scope (e.g. **Whole school**, **Years 2 and 3**, etc.) is selected prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display a **Print Preview** of your chart.

    *Options button*

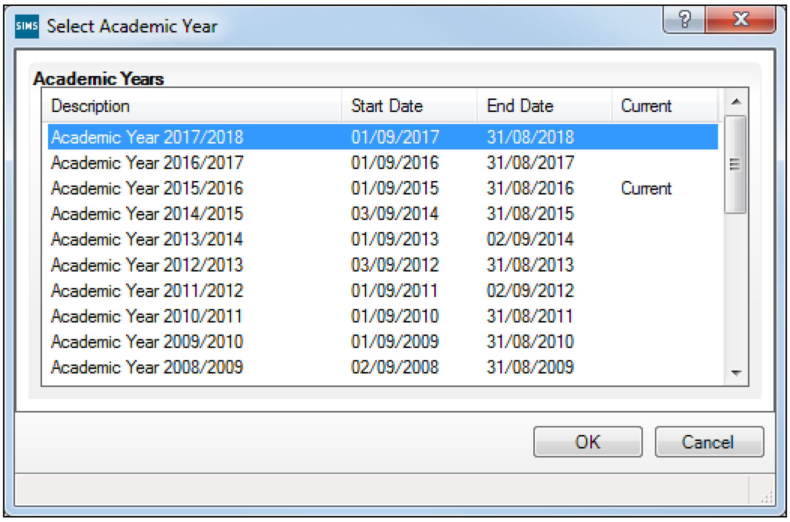
2. Select **File | Print** to select your preferences, then click the **Print** button.

Changing the Displayed Academic Year

To help prepare for the next academic year, it is possible to view the displayed academic year on the SIMS **Home Page** with the appropriate permissions. It is also possible to change the academic year from here.

The currently selected academic year is displayed adjacent to the **Quick Search** bar.

1. Click the **Selected Academic Year** hyperlink to display the **Select Academic Year** dialog.



2. Select the required **Academic Year**, then click the **OK** button.

   A confirmation dialog is displayed. You are not required to restart SIMS.

Increasing the Size of Panels on the Home Page

All of the panels on the SIMS **Home Page** (with the exception of the **Favourites** panel) can be expanded to display their content in full screen mode. This is particularly useful if a panel contains a lot of information, which may be difficult to read in the default view.

Click the **Expand** button to maximise the required panel to full screen mode.

Once maximised, the panel can be reduced to its original size by clicking the **Restore** button.

 *Expand button*

 *Restore button*

If a panel is expanded when you exit SIMS, it will be restored to its original size the next time you log into SIMS.

Setting Panel Refresh Rates

The content of the widgets on the SIMS **Home Page** refresh automatically after a defined period of time. Each of the widgets refresh at a different rate. When a widget is refreshing, the **Panel Refreshing** icon (located in the bottom right-hand corner of the widget) rotates.

Panel Refreshing icon

A number of the widgets can be refreshed manually, in case you wish to view updated content between automatic refreshes. The display of the **Refresh** icon (displayed in the top right-hand corner of a widget) indicates whether or not a widget can be refreshed manually.

Refresh icon

Click the **Refresh** icon to update the content of the widget.

The following widgets can be refreshed manually:

- My Timeline
- School Diary
- Favourites
- My Messages
- Conduct Summary
- Missing Registers Notification
- Admissions Summary

The refresh rate for the following widgets can be set:

- My Timeline widget (please see *Configuring the My Timeline Panel* on page *103*). By default, this widget refreshes every 15 minutes.
- School Diary widget (please see *Configuring the School Diary Panel* on page *105*). By default, this widget refreshes every 8 minutes.
- My Messages widget (please see *Configuring the My Messages Panel* on page *106*). By default, this widget refreshes every 5 minutes.
- Conduct Summary widget (please see *Configuring the Conduct Summary Panel* on page *112*). By default, this widget refreshes every 12 minutes.
- Missing Registers Notification widget (please see *Configuring the Missing Register Notification Panel* on page *107*). By default, this widget refreshes every 10 minutes.
- Admissions Summary widget (please see *Configuring the Admissions Summary Panel* on page *116*). By default, this widget refreshes every 15 minutes.
- Attendance Summary (Administrator only)
- School Messages (Administrator only)

The default for the following is set by SIMS and cannot be amended:

- School Bulletins
- My Reminders
- Favourites
- Assessment Summary
- My Scheduled Reports
- My Detention Sessions.

Scheduling Reports to Run Automatically

Scheduled reports can be set up to run automatically at a specified time. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any recorded behaviour incidences. It is possible to schedule reports to run for both yourself and on behalf of other users.

Once created, the reports are stored on the Document Management Server and a link to the report is displayed in the **My Scheduled Reports** panel on your SIMS **Home Page**.

For these reports to run, a Windows Scheduled Task must be created.

Additional Resources:

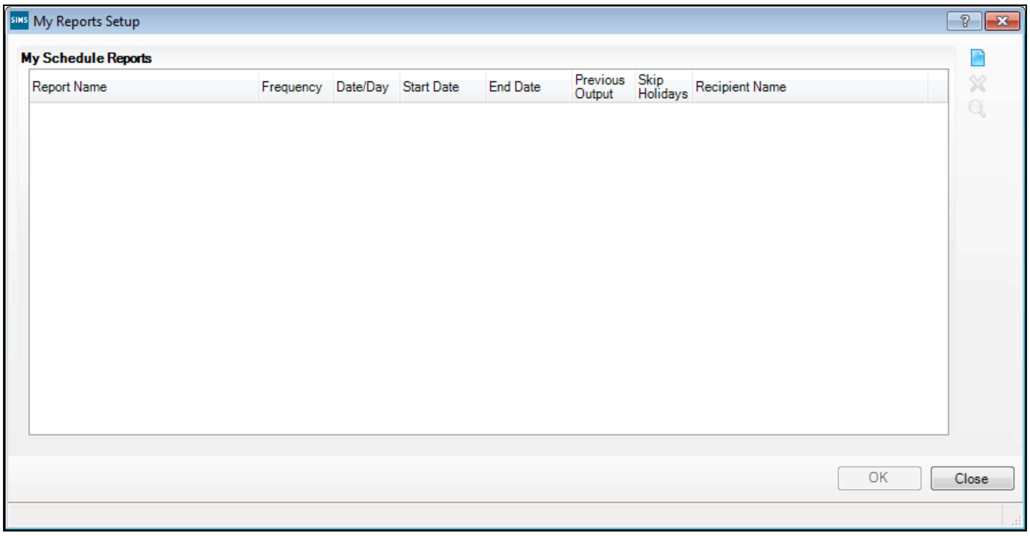
Setting up Scheduled Reports chapter in the *Setting up and Administering SIMS* handbook

Before scheduling any reports to run in SIMS, please consider the following:

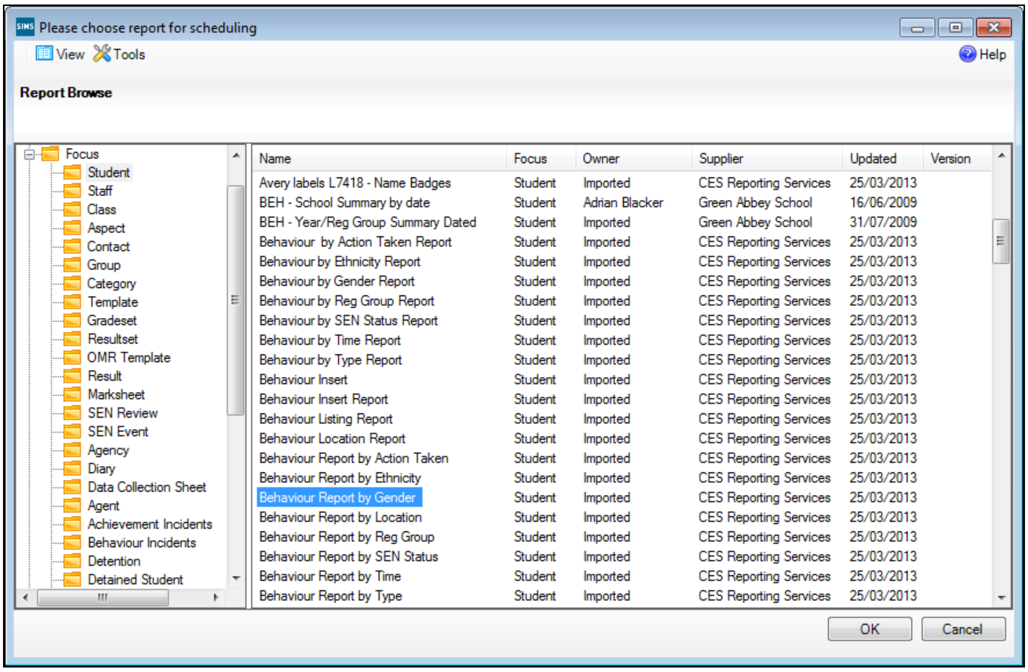
- Ensure that you have applicable permissions to the data contained in the required report. If you do not have sufficient permissions, the scheduled report will be created but you will be unable to open the report.
- Consider the validity of the report. Your System Administrator can advise you of the time of day that scheduled reports will run. This is likely to be out of school hours, although this is not always the case. If you want to schedule a daily report, you need to consider the content of that report. For example, if you are scheduling a report listing pupil/students who were absent at registration, the report will be produced at the time set by the System Administrator. If this is in the early hours of the morning, the report will be produced before today's data is entered and will therefore show yesterday's data (which may be acceptable to you).

1. Select **Focus | Alerts | Schedule Reports** to display the **My Reports Setup** dialog.

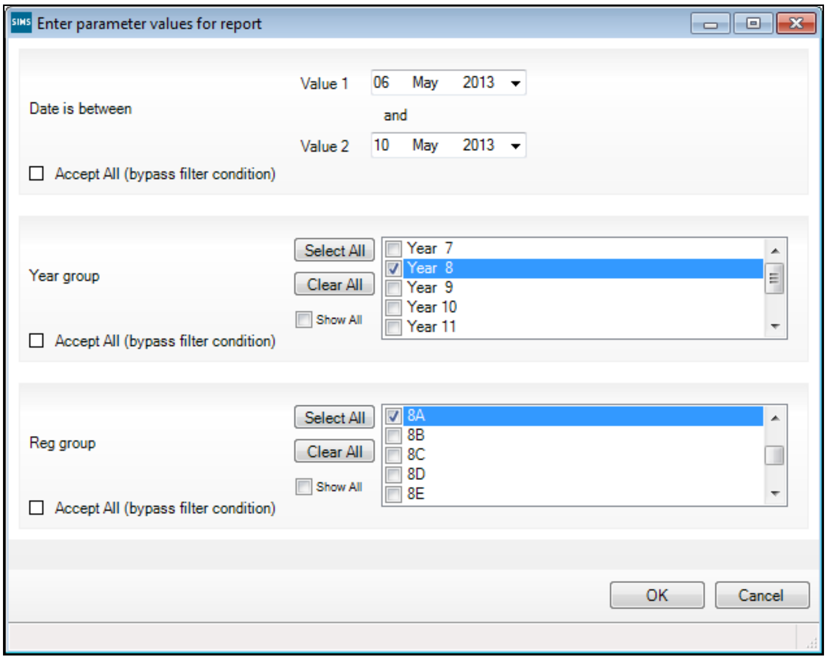
   Any reports that have already been scheduled are displayed.



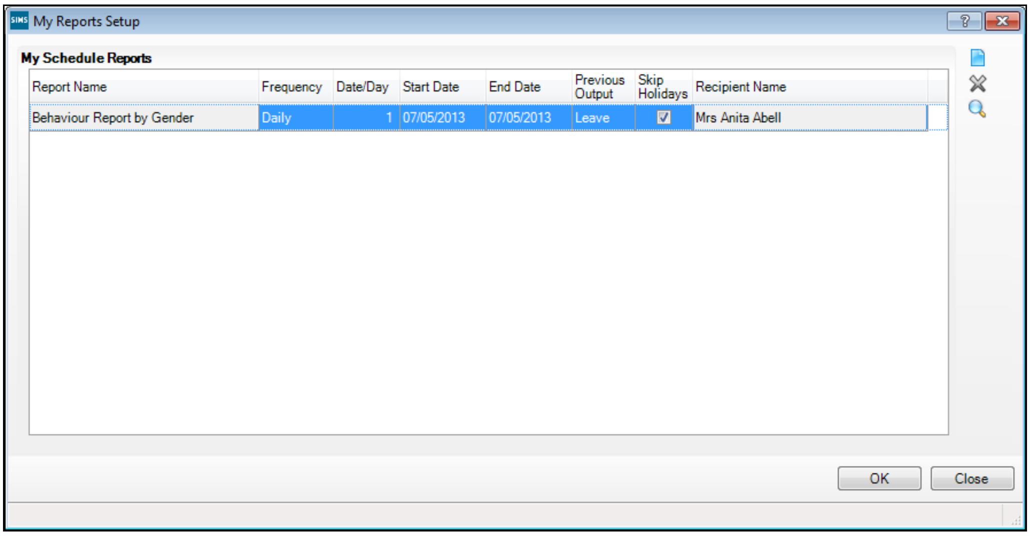
2. Click the **New** button on the right-hand side of the dialog to display the **Please choose report for scheduling** dialog.



3. Navigate to and highlight the required report then click the **OK** button. If any report parameters are required for the report, the **Enter parameter values for report** dialog is displayed.



4. Enter or select the required run-time parameters then click the **OK** button to return to the **My Reports Setup** dialog.

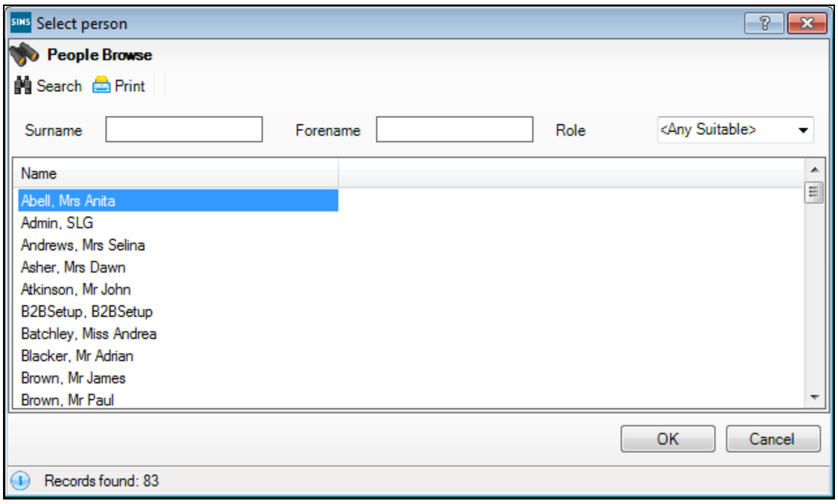


The scheduled report settings can be amended for any report displayed.

- Select the required **Frequency** by clicking in the applicable cell and selecting **Monthly**, **Weekly** or **Daily** from the drop-down list.
- The value in the **Date/Day** field needs to be amended only if **Weekly** or **Monthly** is selected as the **Frequency** because it determines the day of the week or date in the month that the report should be run. Overtype the value in this field, if required.

NOTE: If your System Administrator has set all SIMS reports to run on a weekly or monthly basis, those settings override any settings applied here. For example, if the administrator has set reports to be run weekly on a Monday and your settings state Wednesday, the reports will be run on a Monday.

- The **Start Date** and **End Date** default to today's dates. Therefore it is essential to amend the **End Date** to a future date (i.e. for as long as you want the scheduled report to run). Either double-click in the fields and overtype the dates or click in the field and select the required dates by clicking the drop-down arrow.
- The **Previous Output** setting determines whether the output from any previously run scheduled report is overwritten or retained. Click in the **Previous Output** field and select **Leave** or **Delete** from the drop-down list.
- The **Skip Holiday** check box identifies whether scheduled reports should be run during school holidays (as defined in the School Diary). This check box is selected by default. Deselect this check box if you want to continue to produce reports during school holidays.
- By default, any scheduled reports are produced for you. However if you have the applicable permissions, you can also select reports to be produce automatically for other users. With the required report highlighted, click the **Choose Recipient** button on the right-hand side of the dialog to display the **Select person** dialog.



Search for, then double-click the required recipient to return to the **My Reports Setup** dialog. The selected **Recipient Name** is displayed.

5. Repeat this process for any other reports you wish to schedule.
6. Click the **OK** button to complete the process.

Deleting a Scheduled Report

Any scheduled reports that are no longer required can be deleted.

1. Select **Focus | Alerts | Schedule Reports** to display the **My Reports Setup** dialog.
2. Highlight the required report click the **Delete** button on the right-hand side of the dialog.
3. Click the **Yes** button when prompted to confirm the deletion.

03 | Configuring the SIMS Home Page

Home Page Configuration Overview

The content and layout of the SIMS **Home Page** can be defined on a per-user basis, enabling the display of information that relates specifically to each SIMS user.

The information displayed on the SIMS **Home Page** is displayed in individual panels, which each user can choose to display or hide. When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

The panels that can be displayed on your SIMS **Home Page**, together with their content, are determined by the permissions you have been granted by the System Manager. For example, if you are a class teacher of registration group 8A, the System Administrator may have set up panels on your **Home Page** that display information relating to registration group 8A by default.

The displayed panels can be configured to display data relevant to your role and, for class teachers, the classes that they teach. For example, a Head of Year might want to display behaviour incident information by registration group, whereas a Head Teacher might want to display the same information by year group.

WARNING: *Prior to adding panels to the SIMS* ***Home Page****, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS* ***Home Page*** *might be set to refresh regularly. If the SIMS* ***Home Page*** *for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.*

Configuring the SIMS Home Page

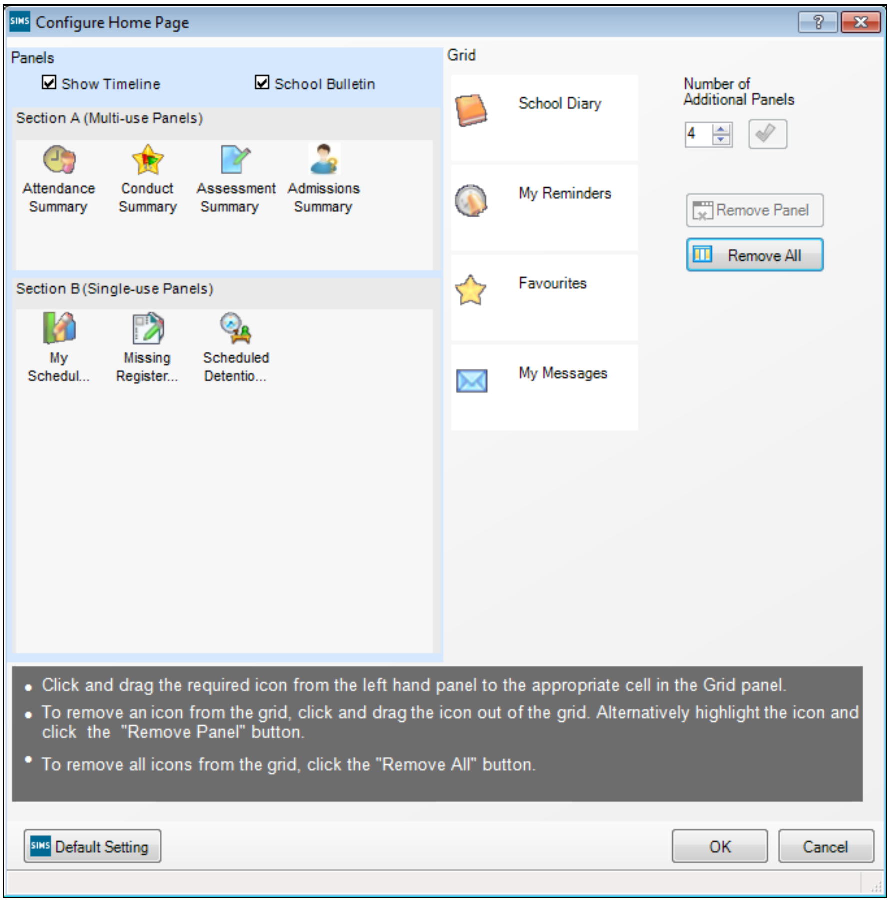
The content and layout of the SIMS **Home Page** can be defined on a per-user basis, enabling the display of information that relates specifically to each SIMS user. Changing the content and layout on your SIMS **Home Page** does not affect the display of the Home Page on any other user's workstation.

The number of panels displayed and their display order can be defined. Once displayed on the SIMS **Home Page**, many of the panels offer additional configuration options.

*NOTE: A maximum of 50 panels can be displayed on the SIMS **Home Page**.*

The number of panels displayed on the SIMS **Home Page**, together with their content and display order, can be defined.

Click the **Configure** button at the top right-hand side of the SIMS **Home Page** to display the **Configure Home Page** dialog.



The panels currently displayed on your SIMS **Home Page** are shown in the **Grid** on the right-hand side of the dialog. The **Grid** represents the display order of these panels on the SIMS **Home Page**, not the precise layout. When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

For new users of SIMS, the **Grid** contains the panels set up by the System Administrator.

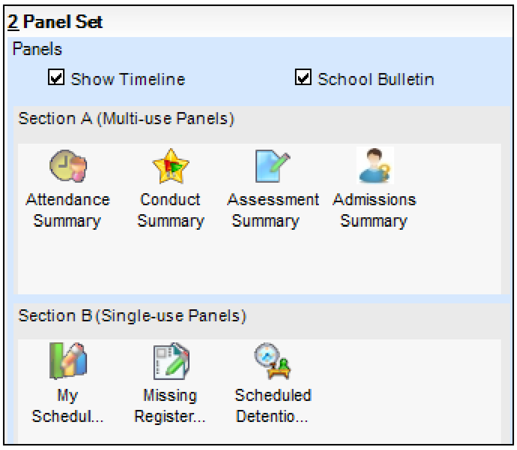
*NOTE: Panels in the **Grid** that display a lock symbol indicate that your System Administrator has dictated the display of this panel. You do not have permissions to remove this panel from your **Home Page**. It may also be possible that you are unable to add panels, and the **Panels** section is greyed out to indicate this.*

Additional Resources:

General SIMS Setups chapter of the *Setting up and Administering SIMS* handbook

Displaying and Hiding the Default SIMS Home Page Panels

To facilitate the selection of panels you might want to display on your SIMS **Home Page**, the **My Timeline** and **School Bulletins** panels have been identified as two panels that are likely to be beneficial to all SIMS users. Consequently, they have been defined as default panels that you can choose to display prominently on the SIMS **Home Page**.



When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

In the **Panels** section on the left-hand side of the **Configure Home Page** dialog, select or deselect the **Show Timeline** and **School Bulletin** check boxes.

- If selected, the **My Timeline** panel will always be displayed as the first panel, at the top-left hand side of the SIMS **Home Page**.
- If only the **School Bulletins** check box is selected, it will be displayed as the first panel on the SIMS **Home Page**.
- If both of these check boxes are selected, the **School Bulletins** panel will be displayed in any empty space to the right-hand side of the **My Timeline** panel. If no space is available to the right, it will be placed in the next available slot on the following line.

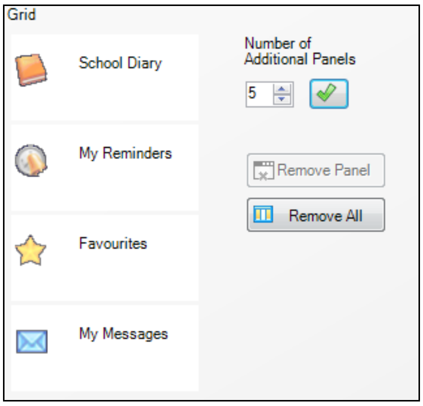
Click the **OK** button to return to the SIMS **Home Page**, where the display will be updated.

Selecting the Number of Additional Panels to Display on the SIMS Home Page

The number of panels you wish to display on the SIMS **Home Page** can be defined. This number is in addition to the default panels (the **My Timeline** and **School Bulletin** panels) that you may have selected (please see *Displaying and Hiding the Default SIMS Home Page Panels* on page *79*). Therefore if you want to display six panels in total, including the two default panels, enter 4 in the **Number of Additional Panels** field.

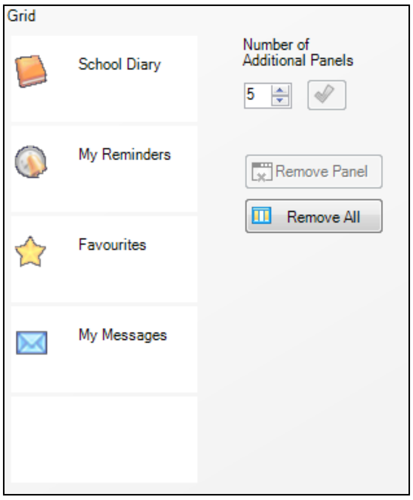
- If the **Number of Additional Panels** is increased, an additional empty panel is displayed beneath the final selected panel.
- If the **Number of Additional Panels** is decreased, any panels that would cause this value to be exceeded are removed, starting from the bottom of the **Grid** list.

1. Enter the **Number of Additional Panels** you want to display on the SIMS **Home Page**. Alternatively, click in the field then click either the **Up** or **Down** arrow adjacent to the field to change the number.



2. Click the **Configure Layout** button.


Configure Layout button



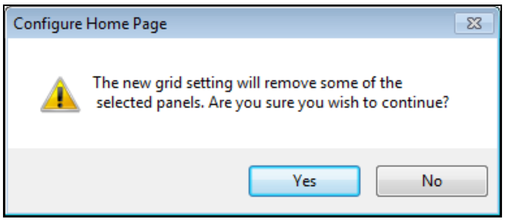
When the configuration is saved, the **Grid** display expands or contracts based on the value entered.

- If the **Number of Additional Panels** was increased, an additional empty panel is displayed beneath the final selected panel.

  In the previous graphic, an empty space has been added beneath the **My Messages** panel, enabling another panel to be added to the SIMS **Home Page**.

- If the **Number of Additional Panels** was decreased, any panels that would cause this value to be exceeded are removed, starting from the bottom of the **Grid** list.

  In the previous graphic, if the **Number of Additional Panels** was now reduced to four, only the empty space at the bottom of the **Grid** would be removed. However if the **Number of Additional Panels** was reduced to two, the following message will be displayed because you are attempting to remove an occupied space on the SIMS **Home Page**.

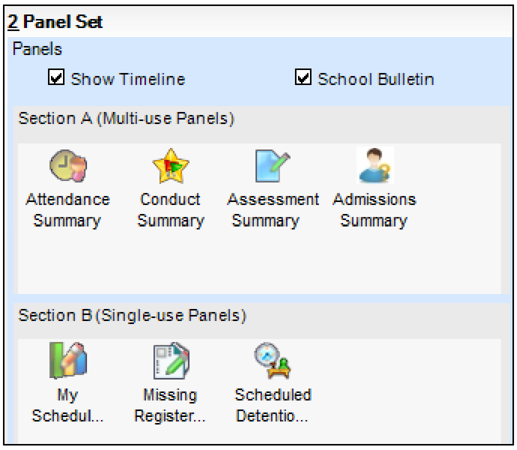
  

  Click the **Yes** button to remove the **Favourites** panel, **My Messages** panel and the empty space at the bottom of the **Grid** and therefore remove them from the SIMS **Home Page**. Alternatively, click the **No** button to cancel the removal of the panel(s).

3. Click the **OK** button to return to the SIMS **Home Page**, where the display will be updated.

Adding Panels to the Home Page

*WARNING: Prior to adding panels to the SIMS **Home Page**, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS **Home Page** might be set to refresh regularly. If the SIMS **Home Page** for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.*



There are two types of panel that can be added to the SIMS **Home Page**:

- Single use panels

  A single use panel serves a single purpose for a SIMS user. This type of panel displays information relevant to the user, e.g. the My Messages panel displays all messages sent to the user and the My Reminders panel displays reminders for events that the user is involved with. One occurrence of these panels can be added to the SIMS **Home Page**.

- Multi-use panels

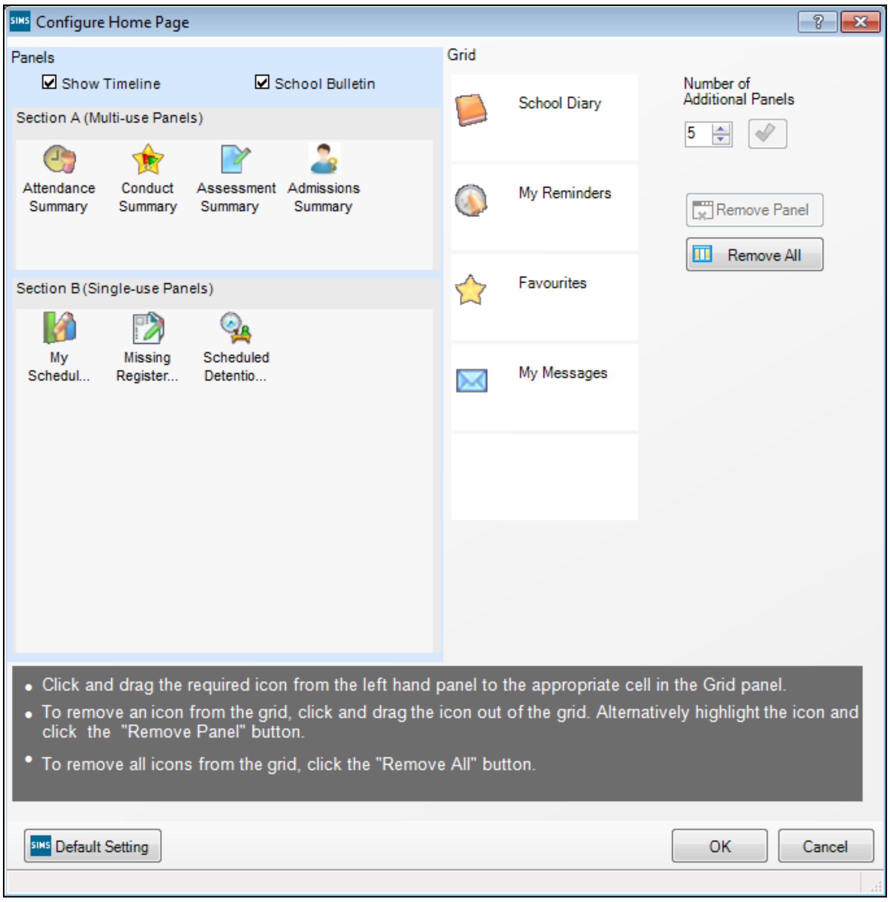
  A multi-use panel enables you to view important information relating to a specific subject matter, but for a range of groups. Multiple instances of a multi-use panel can be added to the SIMS **Home Page**. This would be particularly useful for a Head of Year, for example, who may wish to view an attendance summary for each of their registration groups. This can be achieved by adding more than one occurrence of the Attendance Summary panel to their Home Page and configuring each panel separately to display attendance information for each of the registration groups.

The method of adding a single use panel and a multi-use panel is identical. The configuration options available for each individual panel varies depending on the panel you have added.

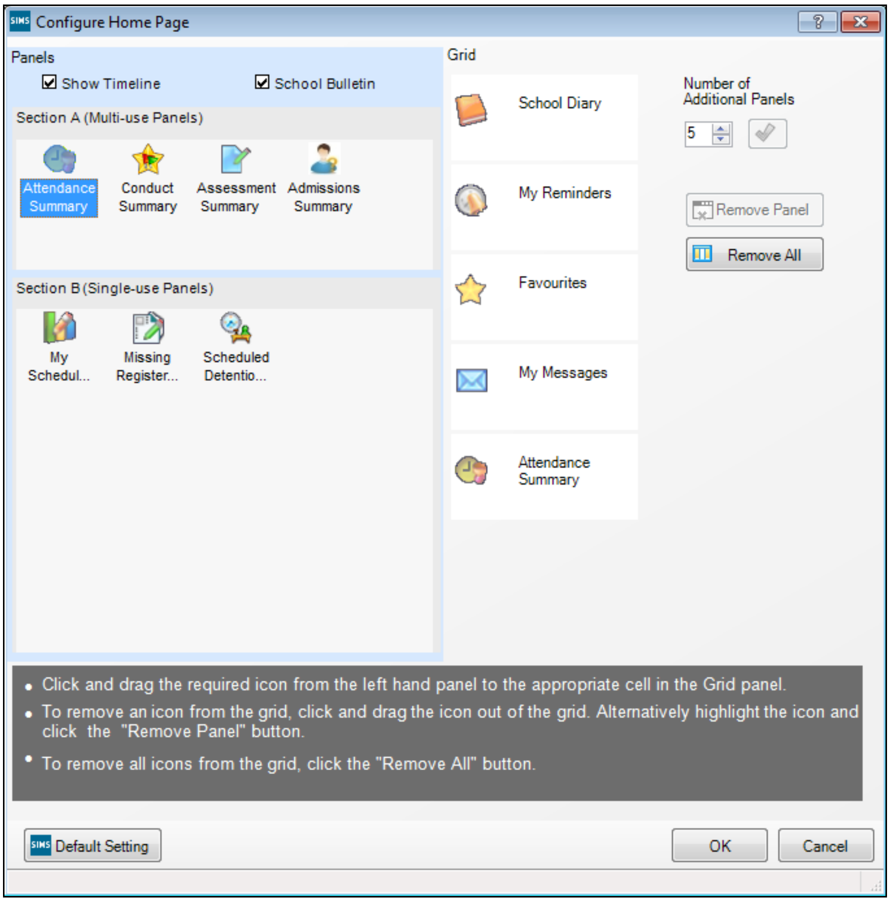
*NOTE: The ability to add panels to the SIMS **Home Page** is determined by the lock settings provided by the System Manager/Administrator. The following processes assume that the lock settings have been disabled, enabling you to add panels to the SIMS **Home Page**. For more information, please refer to the General SIMS Setups chapter of the Setting up and Administering SIMS handbook.*

The graphics in this section demonstrate how the **Attendance Summary** multi-use panel can be added to the **Grid**.

1. Ensure that a sufficient number of spaces on the SIMS **Home Page** have been provided for the number of panels you wish to add (please see *Selecting the Number of Additional Panels to Display on the SIMS Home Page* on page *80*).



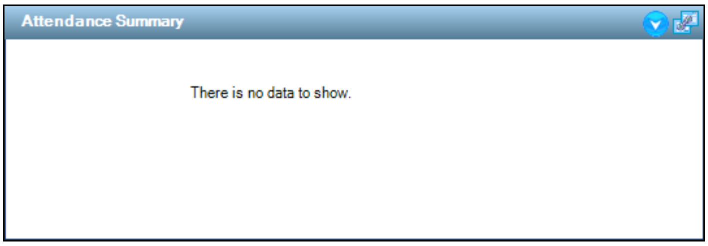
2. Click and drag a panel from either **Section A (Multi-use Panels)** or **Section B (Single-use Panels)** into the required empty position on the **Grid** on the right-hand side of the page. The name of the selected panel is displayed.



> *NOTE: If you attempt to drag a panel into an occupied space in the Grid, a message is displayed in the Status Bar of the dialog, informing you that the panel cannot be placed in this location. If you want to place a panel into a position that is currently occupied, you must first place the panel into an empty space and the move it to the required location (please see* Changing the Panel Order *on page* 88*).*

3. Repeat Step 2 until all of the required panels have been selected. If you are selecting to display a multi-use panel, ensure that one instance of the panel is added for each of the groups you wish to monitor.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the new panels are displayed.

If you have added a multi-use panel to the SIMS **Home Page** and a message is displayed in the panel rather than any data, you must configure this panel separately to indicate your preferences.



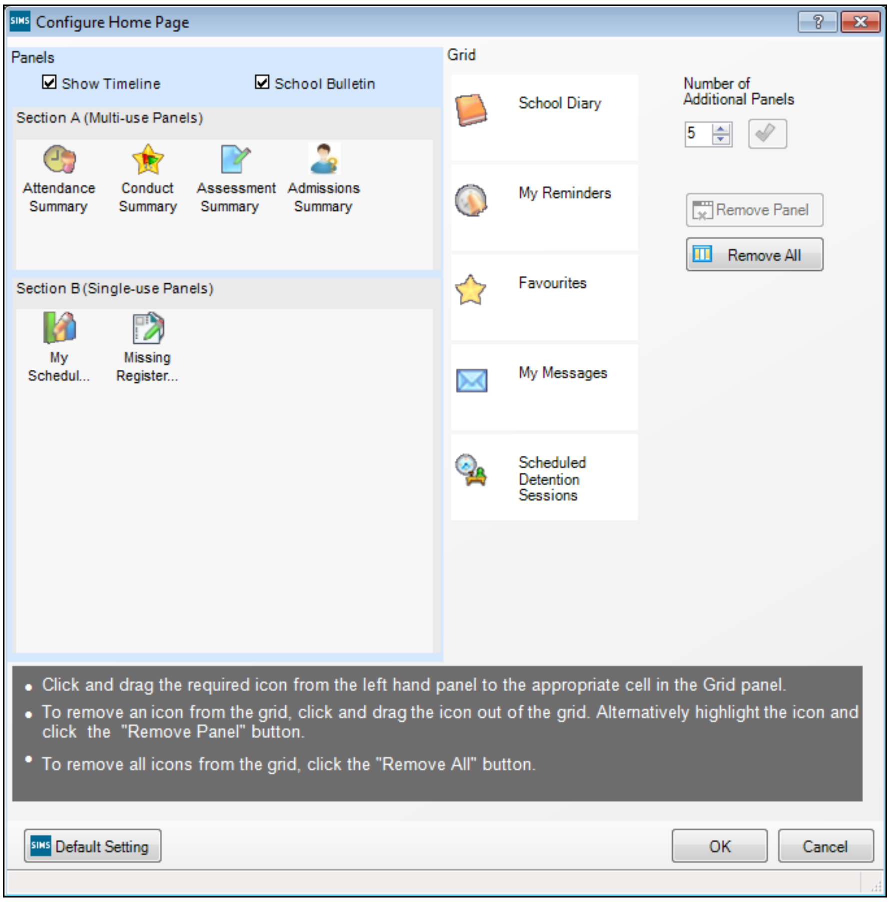
More Information:
Locking Home Page Groups on page *100*

Removing Panels from the Home Page

Panels that are no longer required or have been added to the SIMS **Home Page** in error can be removed.

> *NOTE: The ability to add panels to the SIMS **Home Page** is determined by the lock settings provided by the System Manager/Administrator. The following processes assume that the lock settings have been disabled, enabling you to add panels to the SIMS **Home Page**. For more information, please refer to the General SIMS Setups chapter of the Setting up and Administering SIMS handbook.*

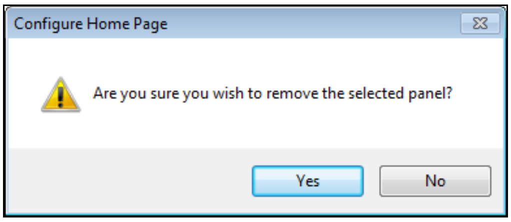
The graphics in this section demonstrate how the **Scheduled Detention Sessions** single use panel can be removed from the **Grid**.



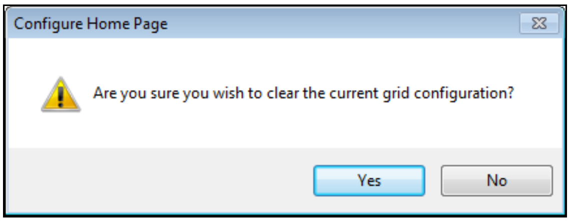
1. In the **Grid** display, click the panel you wish to remove then click the **Remove Panel** button. Alternatively, click and drag the required panel from the **Grid** display to anywhere <u>outside</u> of the **Grid** display. All panels can be removed from the Home Page by clicking the **Remove All** button.

> *NOTE: Removing panels by clicking the **Remove All** does not affect the display of the default panels (**My Timeline** and **School Bulletins**). These are treated separately and their display is controlled by the status of their check boxes in the **Panels** section at the top of the **Configure Home Page** dialog.*

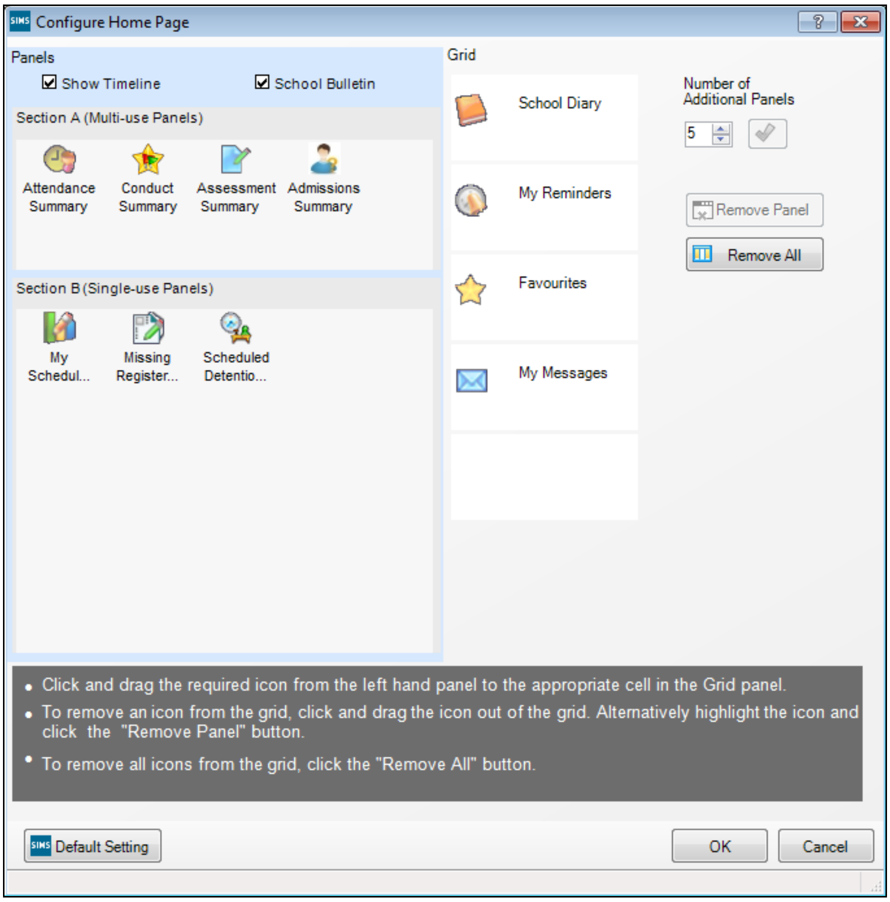
The following message is displayed if you remove a single panel.



The following message is displayed if you remove all panels.



2. Click the **Yes** button to remove the panel(s) or the **No** button to cancel the removal.



The selected panel(s) are removed from the **Grid** display.

If you remove a single use panel, the removed panel will be placed back in the **Section B (Single-use Panels)** section.

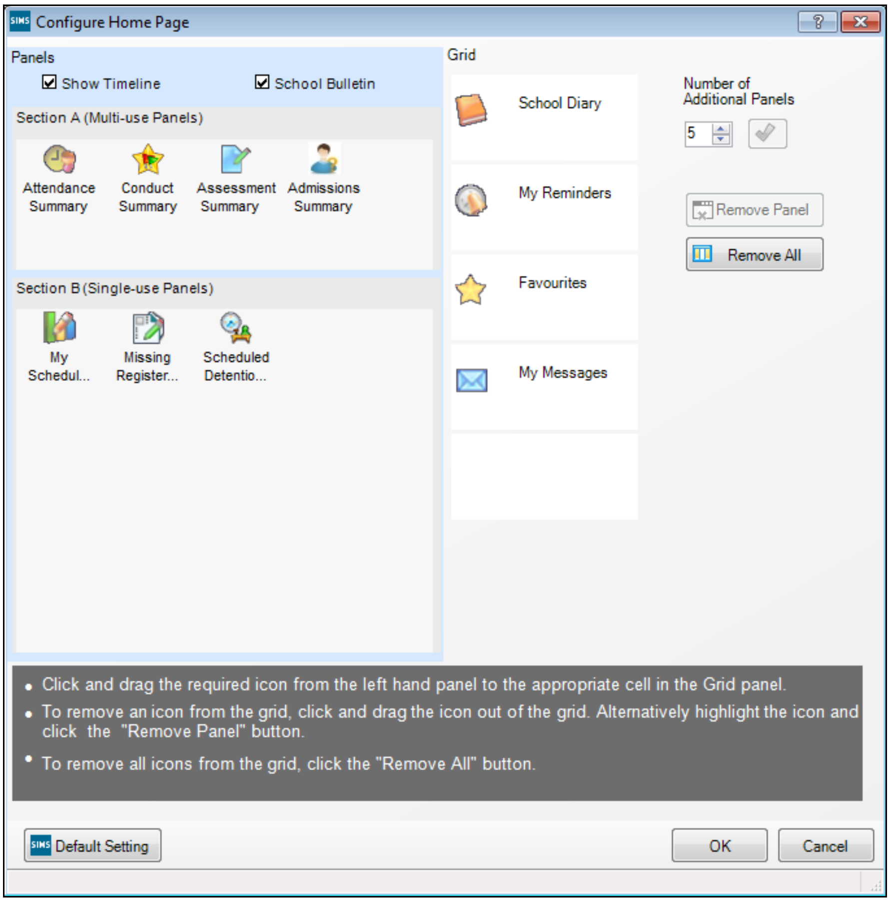
3. Repeat Steps 1 and 2 until all of the required panels have been removed. If you are removing multi-use panels, ensure that each unwanted instance of the panel is removed.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the removed panels are no longer displayed.

More Information:
Locking Home Page Groups on page *100*

Changing the Panel Order

With the exception of the **My Timeline** and **School Bulletins** panels, the display order of all Home Page panels can be changed. This is particularly useful if you want to display a specific panel towards the top of the page, perhaps because you want this information to be instantly visible when the Home Page is displayed.

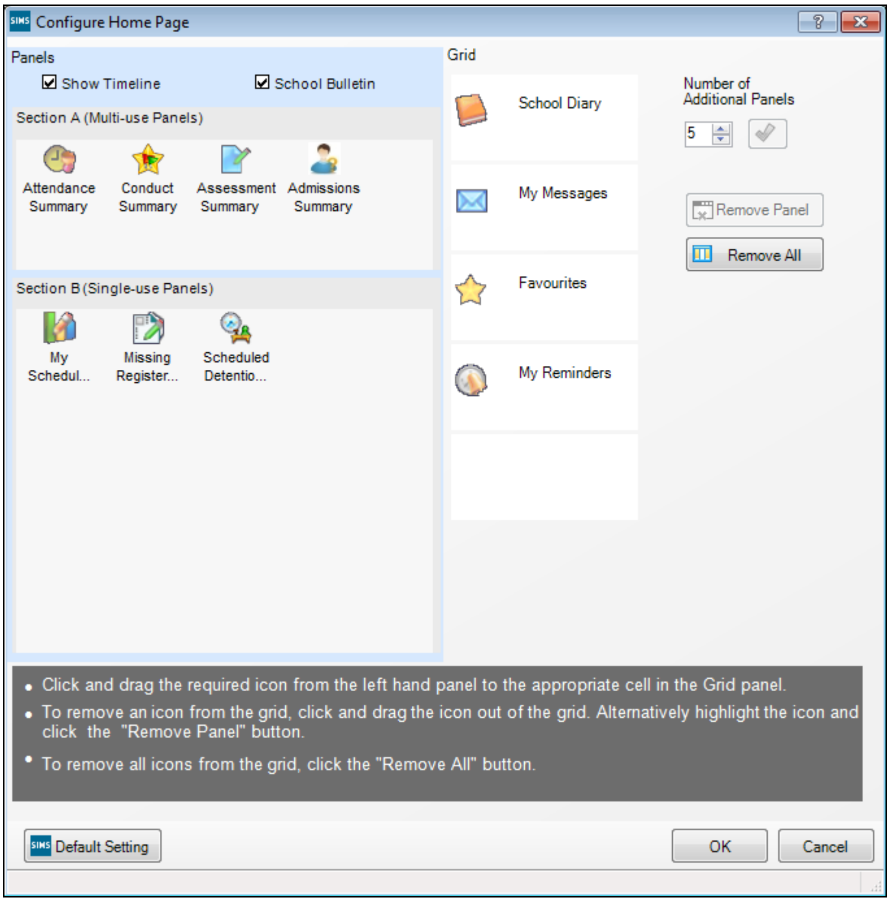
The graphics in this section demonstrate how the panel display order is changed my swapping the location of the **My Messages** and **My Reminders** panels.



1. Ensure that all the panels you wish to display on the SIMS **Home Page** have been added to the **Grid** display (please see *Adding Panels to the Home Page* on page *82*).
2. Click and drag a panel from its current location in the **Grid** display to the required location.

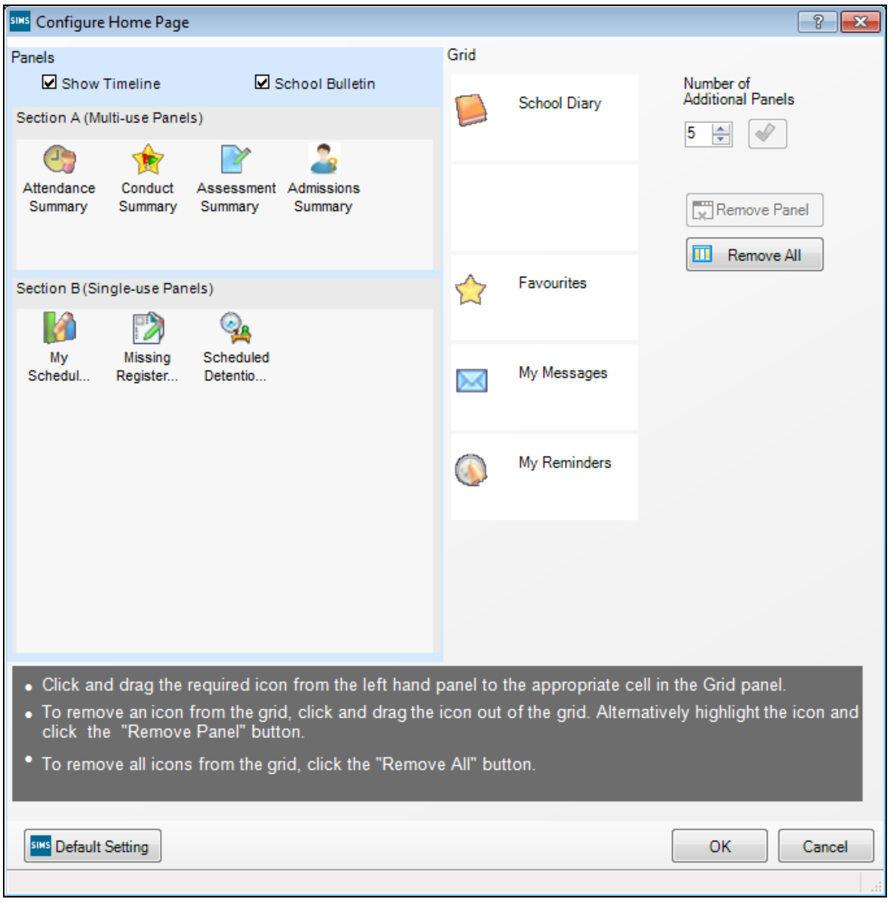
   If you move a panel from its current location to an empty space in the Grid display, the panel is removed from its current location and placed into the empty slot.

If you move a panel from its current location to an occupied space in the Grid display, the two panels change places.



3. Repeat Step 2 until the panels are in the required display order.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the panels are displayed in the new order.

The following graphic demonstrates the situation where, having re-arranged the display order of panels on the Home Page, there is an empty space in the **Grid** display.



If you save this configuration by clicking the **OK** button, no empty spaces are displayed on the SIMS **Home Page**. Instead, if an empty space is present on the **Grid** display, this space is truncated on the Home Page and makes best use of the space available.

Reverting to the Default Home Page View

If you have configured the SIMS **Home Page** to display a set of widgets, and these widgets have been configured individually, it is possible to return to the default Home Page configuration, if required.

WARNING: *Before continuing, please ensure that you have read the introductory section on Home Page groups (please see* Understanding Home Page Groups *on page* 91*).*

Restoring the default settings of your Home Page has two effects:

- It restores the layout and configuration of your Home Page widgets to those specified by your Home Page group(s), removing any widgets that are not defined in the Home Page groups.

  > *NOTE: If you are not assigned to a Home Page group, your Home Page reverts to the default layout (please see* Default Home Page Panels for Users Not Assigned to a Home Page Group *on page* 93*).*

- It merges any summary panels that are configured to view similar information. For example, if you are the Registration Tutor of registration group 7A <u>and</u> 7B, then you may have two **Attendance Summary** panels on your **Home Page**. Restoring the defaults merges these into a single **Attendance Summary** panel, which displays data for <u>both</u> 7A and 7B. This is applicable only if you are recorded as the registration tutor for both of these classes in the pastoral structure (if you tutor only group 7A, the summary panel for 7B is removed when you restore the default settings).

1. Click the **Configure** button at the top of the SIMS **Home Page** to display the **Configure Home Page** dialog.
2. Click the **Default Setting** button to restore to the default settings then click the **Yes** button to confirm.

   > *NOTE: If the **Default Setting** button is disabled, it is not possible to restore the default settings because the Home Page group setting is locked.*

3. Click the **OK** button to save the changes and return to the SIMS **Home Page**.

More Information:
Understanding Home Page Groups on page *91*
Default Home Page Panels for Users Not Assigned to a Home Page Group on page *93*

Understanding Home Page Groups

The information that can be displayed on the SIMS **Home Page** may not be applicable to all members of staff. For example, a Head of Year may want to view only summaries of all pupil/student activity in their year, whereas a class teacher may want to view only the summaries for their class(es).

Home Page groups can be used to ensure that only information relevant to a type of user is displayed on their Home Page. These can be used to display a default set of panels on the **Home Page** for each member of staff who is assigned to a particular group. For example, a class teacher of registration group 7A is assigned to the Registration Tutor Home Page group and therefore, panels that display information on registration group 7A are displayed automatically on their Home Page.

SIMS provides four pre-defined Home Page groups, described in the following table. Please note that all of the pre-defined Home Page groups will include as part of their configuration the automatic display of the **My Timeline** and **School Bulletin** widgets.

Home Page Group	Roles Assigned	Panels Assigned
Head of House	Head of House	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x 2) Scheduled Detention Sessions.
Head of Year	Head of Year	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x2) Scheduled Detention Sessions.
Registration Tutor	Class Teacher	School Diary My Messages My Reminders Favourites My Lesson Plans Attendance Summary Conduct Summary (x2).
Senior Leadership Team	Must be added manually by the System Administrator	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x2) Scheduled Detention Sessions.

NOTES: The preceding table describes only the <u>default</u> assignment of panels to each group in SIMS. Your System Administrator can make changes to these assignments and therefore the panels assigned to you may differ from those specified.

SIMS uses your assignment in the pastoral structure to determine the information displayed on your Home Page. For example, if you are a class teacher recorded as registration tutor for 7A in the pastoral structure, you are assigned summary panels for registration group 7A automatically on your Home Page.

It is possible to be a member of more than one Home Page group. For example, a Head of Year 7 who is also the registration tutor of registration group 7A would be a member of both the ***Registration Tutor*** *group and the* ***Head of Year*** *group. In this case, the member of staff can view the panels assigned to <u>both</u> groups on their Home Page.*

Some members of staff might not be assigned to a Home Page group, in which case they are assigned a default set of Home Page panels (please *see* Default Home Page Panels for Users Not Assigned to a Home Page Group *on page* 93*).*

Default Home Page Panels for Users Not Assigned to a Home Page Group

Some members of staff might not be assigned to a Home Page group. If this is the case, the following panels are displayed on their **Home Page** by default:

- My Timeline
- School Bulletins
- School Diary
- My Messages
- My Reminders
- Favourites

Managing Home Page Groups

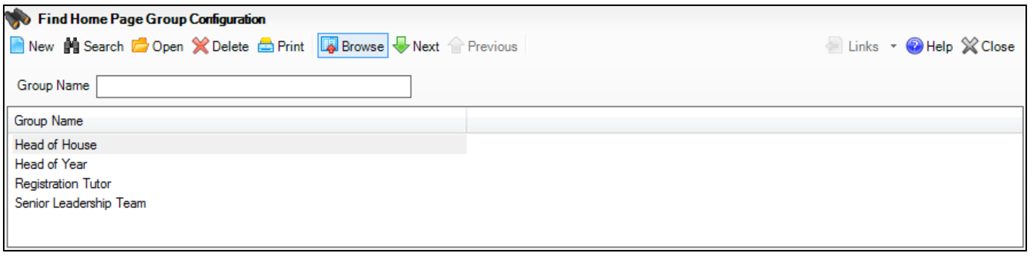
SIMS provides four pre-defined Home Page groups by default. Three of the pre-defined groups are populated automatically with SIMS users, based on their role in the pastoral structure; the Senior Leadership Team is the exception because it requires users to be assigned manually. If the pre-defined Home Page groups do not provide sufficient groupings of SIMS users, you can create your own ones then assign users and Home Page panels to these groups.

A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group. If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page (please see *Default Home Page Panels for Users Not Assigned to a Home Page Group* on page *93*).

Searching for a Home Page Group

Before adding a Home Page Group, you are advised to search for existing groups to ensure that a group with a similar or identical purpose does not already exist.

1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.

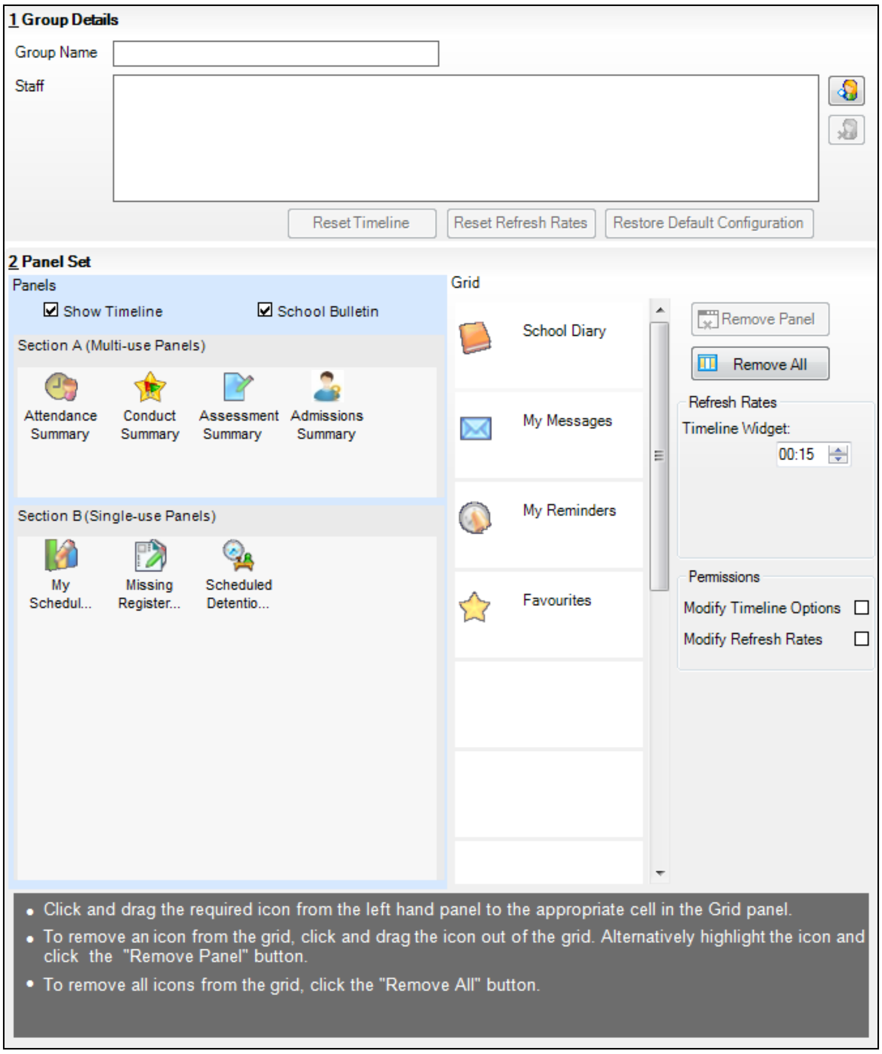


2. Enter all or part of the **Group Name** then click the **Search** button to display all Home Page groups that match the search criteria entered. Alternatively, leave the search criteria blank then click the **Search** button to display all recorded Home Page groups.

Adding/Editing Home Page Groups

1. Search for the Home Page group you wish to edit. If you intend to add a Home Page group, search to ensure that an identical one does not already exist.

2. Highlight the Home Page group you wish to edit then click the **Open** button or add a Home Page group by clicking the **New** button to display the **Home Page Group Configuration Details** page.

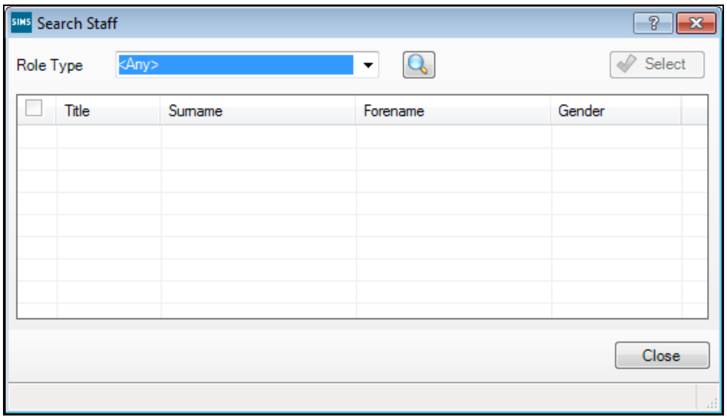


3. Enter a unique **Group Name**.

Assigning Users to a Home Page Group

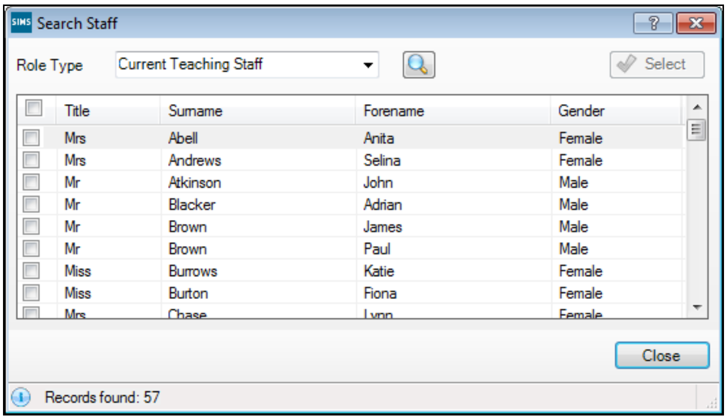
1. Click the **Search Staff** button to display the **Search Staff** dialog.

Search Staff button



2. Search for the required member(s) of staff by selecting their **Role Type** from the drop-down list (e.g. **Current Teaching Staff**) then clicking the **Search** button to display all members of staff with that role. Searching by **Role Type** is a convenient method of assigning all current teaching staff to a single Home Page group.

Search button



3. Select the check box of the member(s) of staff you wish to add to the Home Page group. Alternatively, select the check box in the header row to select all members of staff currently displayed in the **Search Staff** dialog.
4. Click the **Select** button to assign the member(s) of staff to the Home Page group.
5. Click the **Close** button to return to the **Home Page Group Configuration Details** page, where the **Staff** list is populated with the selected member(s) of staff.

6. Any members of staff who have been added in error can be removed from the group by highlighting their name then clicking the **Remove Staff** button.


Remove Staff button

NOTES: A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group.

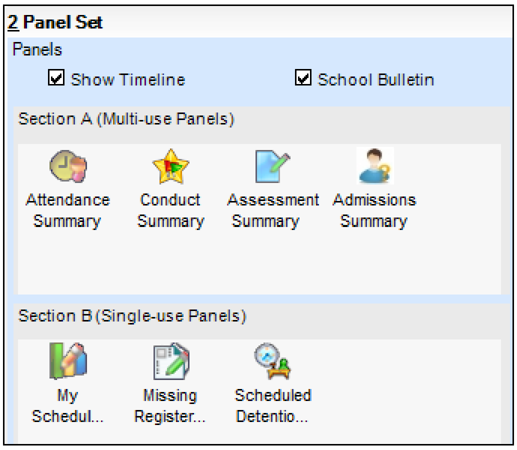
If a staff member is assigned to more than one Home Page group, and you subsequently remove them from one of these groups, the panels assigned to the group from which they have been removed will *__still__* *be displayed on their Home Page until they have been removed manually by the user. To remove all group panels from a user's Home Page, the user must be removed from* *__all__* *Home Page groups.*

If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page (please see Default Home Page Panels for Users Not Assigned to a Home Page Group *on page* 93*).*

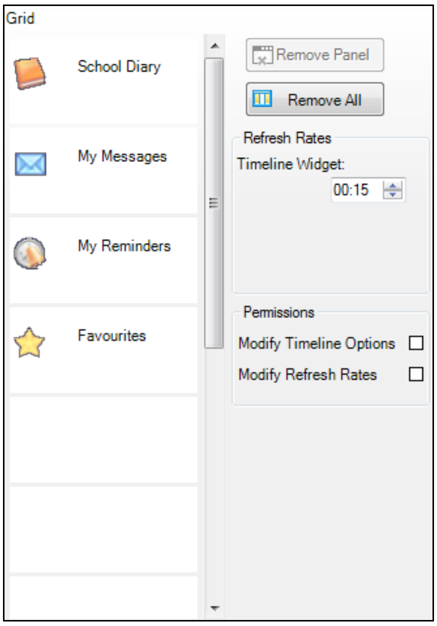
Allocating Panels to a Home Page Group

1. In the **Panel Set** panel, select the **Show Timeline** and **School Bulletin** check boxes to display these panels on the Home Page of users assigned to the selected Home Page group.

   The icons in **Section A** and **Section B** represent the panels that can be added to the Home Page group.



The **Grid** section on the right-hand side of the **Panel Set** panel consists of any panels already assigned to the Home Page group, together with a number of available spaces into which additional panels can be placed.



2. To add a panel to the selected Home Page group, click and drag it from the **Section A** or **Section B** on the left-hand side of the **Panel Set** panel into the required position in the **Grid** on the right-hand side of the **Panel Set** panel.
3. To switch the position of panels in the grid, click and drag the panel you wish to move to the required location.
4. To remove a panel, click and drag the panel out of the grid. Alternatively, click the panel you wish to remove then click the **Remove Panel** button. To remove all panels from the **Grid**, click the **Remove All** button.

WARNING: *Careful consideration should be given when adding panels to a Home Page group, particularly when the group consists of a large number of users. Some of the panels have frequent refresh intervals, so a large number of panels displaying on several workstations could lead to a reduction in the performance of the SIMS system.*

5. Click the **Save** button to save the changes. The changes to a Home Page group come into effect once SIMS is restarted on a user's workstation.

Preventing Changes to the Home Page Configuration and Resetting Configurations

1. If you want to prevent users who are members of a Home Page group from changing the configuration of the **My Timeline** widget, i.e. prevent users from selecting the events displayed on the widget:
   a. Deselect the **Modify Timeline Options** check box in the **Permissions** panel.
   b. Click the **Save** button.
2. If you want to reset the **My Timeline** widget for users who are members of a Home Page group to its original configuration as defined in the **Home Page Timeline Configuration** dialog:
   a. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
   b. Click the **Reset Timeline** button, click the **OK** button to confirm the selection of staff then click the **Yes** button.
3. If you want to prevent users from changing the refresh rates for the widgets displayed on their Home Page:
   a. Deselect the **Modify Refresh Rates** check box in the **Permissions** panel.
   b. In the **Refresh Rates** panel, enter the refresh rate of the **Timeline Widget** or select the rate by clicking either the **Up** or **Down** button. This is a global value that cannot be changed by a user, if the **Modify Timeline Options** check box is selected.
   c. Click the **Save** button.
   d. To set a default refresh rate (which cannot then be changed by a user), click each widget displayed in the **Grid** panel then enter a refresh rate in the widget-named field in the **Refresh Rates** panel or select the rate by clicking either the **Up** or **Down** button. This option is available only for widgets that have a configurable refresh rate.
   e. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
   f. Click the **Reset Refresh Rates** button, click the **OK** button to confirm the selection of staff then click the **Yes** button to affect the change.
4. If a user's Home Page configuration has been corrupted, you can reset the configuration of the Home Page for all members of staff associated with the selected Home Page group.
   a. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
   b. Click the **Restore Default Configuration** button, click the **OK** button to confirm the selection of staff then click the **Yes** button to affect the change.
5. Click the **Save** button then restart SIMS to update the system configuration.

Locking Home Page Groups

The panels assigned to each Home Page group can be locked to ensure that users cannot remove them from their Home Page. This functionality can also be used to prevent users from displaying additional panels on their Home Page.

> *NOTES: Setting a lock on Home Page groups does not prevent users from configuring panels that are already displayed on their Home Page.*
>
> *Careful consideration should be given to the locking options selected because any setting applied affects all Home Page groups. It is not possible to select the Home Page groups to which you wish to apply a lock.*

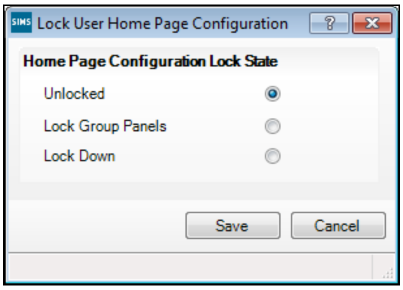
Three levels of locking are available:

- **Unlocked** - this is the default option. The panels assigned to all Home Page groups are initially displayed on each member's Home Page. However, each group member can add or remove panels as required. The additional panels selected by each user do not affect the panel configuration of the remaining members of the Home Page group.
- **Lock Group Panels** - selecting this option prevents the removal of panels assigned to each group member. Each group member can display additional panels on their Home Page. However, none of the default panels assigned to the Home Page group can be removed. Any additional panels that a member chooses to display do not affect the panel configuration of the remaining members of the Home Page. Any additional panels that a member chooses to display can be removed, if required.

  > *NOTE: The **Lock Group Panels** option does not lock the **Show Timeline** or **School Bulletin** check boxes, or the **School Diary**, **My Messages**, **My Reminders** or **Favourites** panels in the **Configure Home Page** dialog (accessed by clicking the **Configure** button at the top of the SIMS **Home Page**. All of these panels are user-defined and therefore can be removed by each user.*

- **Lock down** - selecting this option locks all panels on the Home Page for all users. This rule applies to panels that are assigned to a Home Page group, to panels that have been added by each user and to panels of any user who is not a member of a Home Page group. Selecting this option prevents a user from displaying additional panels and from removing existing panels.

1. Select **Routines | Home Page | Lock Home Page Configuration** to display the **Home Page Configuration Lock State** dialog.



2. Select the required radio button then click the **Save** button to save the lock configuration.

   The lock setting comes into effect when SIMS is restarted on a user's workstation.

Deleting Home Page Groups

Home Page groups that have been added in error or are no longer required can be deleted.

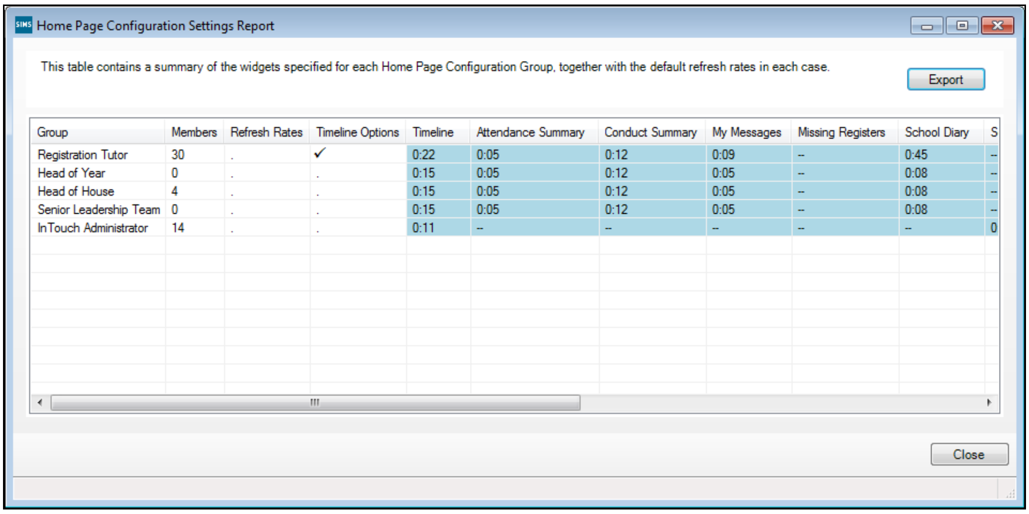
1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.
2. Click the **Search** button to display all Home Page groups.
3. Highlight the group you wish to delete then click the **Delete** button.

Producing the Home Page Configuration Settings Report

The Home Page Configuration Settings report provides a summary of the widgets specified for each Home Page configuration group. If the performance of the SIMS Home Page is reduced, this report assists the System Manager in detecting what might be slowing system performance and what changes could be made to improve it.

The default refresh rate (for each widget that has a configurable refresh rate) is displayed, as is the range of other widgets associated with the group and the number of group members. Additionally, an indication is provided of whether group members can change refresh rates for the widgets and whether they can change the timeline options.

1. Select **Routines | Home Page | Home Page Configuration Settings Report** to display the **Home Page Configuration Settings Report** dialog.

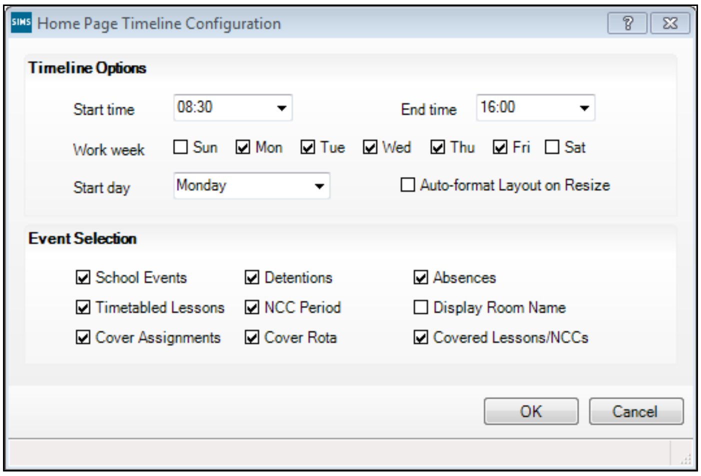


2. Hover over a cell of the report to display more information at the bottom of the dialog.
3. To copy the content of the report to the clipboard so that it can be pasted into another application, e.g. Microsoft® Excel, click the **Export** button.
4. Click the **Close** button.

Configuring the Home Page Timeline

The default configuration of the **My Timeline** widget on the SIMS **Home Page** can be defined. SIMS users can define their specific requirements using the configure option in the **My Timeline** widget.

1. Select **Routines | Home Page | Home Page Timeline Configuration** to display the **Home Page Timeline Configuration** dialog.



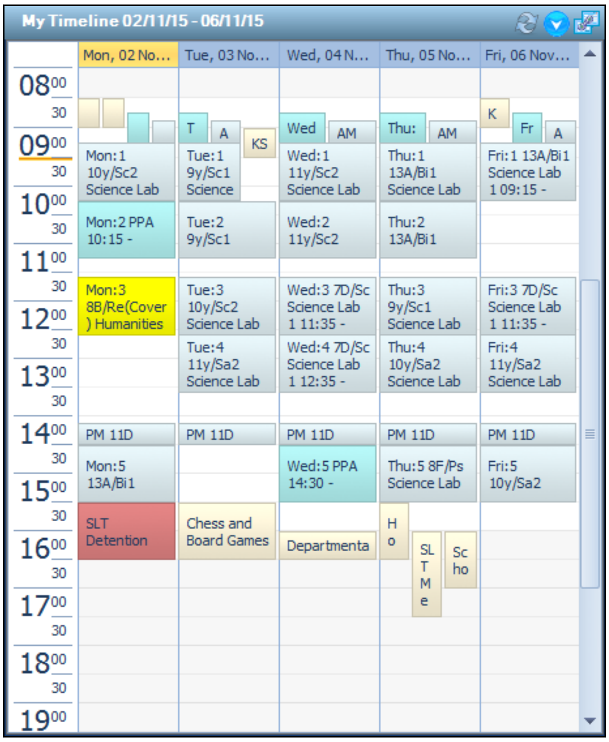
2. In the **Timeline Options** panel, enter the default **Start time** and **End time** for the **My Timeline** panel. Alternatively, select the times from the respective drop-down lists.

   The dates entered or selected determine the visible timescale on the **My Timeline** panel when the Home Page is opened. Having entered `08:30` as the **Start time** and `16:00` as the **End time** means that, when the Home Page is opened, the period between 08:30 and 16:00 are displayed on-screen, with a white background (indicating 'active' hours). Any times before and after this period are displayed with a darker background, indicating that this is outside of normal working hours.

   *NOTE: A period of 11 hours and 30 minutes can be displayed on the default **My Timeline** view. Use the adjacent scroll bar to view earlier or later events. Alternatively, maximise the display of the **My Timeline** panel to view the panel in full screen mode.*

3. Select the days of the week you wish to display on the **My Timeline** panel by defining the **Work week**. Select the check box adjacent to the day(s) of the week you want to display.
4. Select the first day of the working week from the **Start day** drop-down list. This indicates day of the week that is displayed in the left-hand column and, based on the settings in the **Work week** section, the subsequent columns.
5. If you want to display the timeline for the entire week when the **My Timeline** widget is expanded to full-screen mode, select the **Auto-format Layout on Resize** check box. Deselecting this check box displays the timeline for today only when the widget is expanded.

6. In the **Event Selection** panel, select the check box of the type(s) of event you wish to display in the **My Timeline** panel.



7. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Increasing the Size of Panels on the Home Page on page *70*

Configuring the Individual Panels on the SIMS Home Page

Configuring the My Timeline Panel

Your timetable is displayed in the **My Timeline** widget on the SIMS **Home Page**.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Timeline** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *82*).

The content of the **My Timeline** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **My Timeline** panel with any new events, etc. at regular intervals.

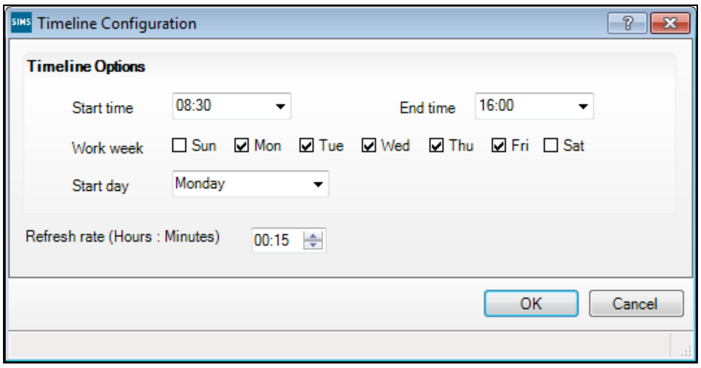
> ***WARNING:*** *Prior to setting a default refresh rate for a panel on the SIMS* ***Home Page****, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

 *Refresh button*

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Timeline Configuration** dialog.

 *Options button*



2. Enter the default **Start time** and **End time** for the **My Timeline** panel. Alternatively, select the times from the respective drop-down lists.

   The dates entered or selected determine the visible timescale on the **My Timeline** panel when the Home Page is opened. Having entered `08:30` as the **Start time** and `16:00` as the **End time** means that, when the Home Page is opened, the period between 08:30 and 16:00 are displayed on-screen, with a white background (indicating 'active' hours). Any times before and after this period are displayed with a darker background, indicating that this is outside of normal working hours.

> *NOTE: A period of 11 hours and 30 minutes can be displayed on the default* ***My Timeline*** *view. Use the adjacent scroll bar to view earlier or later events. Alternatively, maximise the display of the* ***My Timeline*** *panel to view the panel in full screen mode.*

3. Select the days of the week you wish to display on the **My Timeline** panel by defining the **Work week**. Select the check box adjacent to the day(s) of the week you want to display.
4. Select the first day of the working week from the **Start day** drop-down list. This indicates day of the week that is displayed in the left-hand column and, based on the settings in the **Work week** section, the subsequent columns.

5. In the **Event Selection** panel, select the check box of the type(s) of event you wish to display in the **My Timeline** panel. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
6. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 15 minutes. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
7. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing the My Timeline Panel on page *18*
Increasing the Size of Panels on the Home Page on page *70*

Configuring the School Diary Panel

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **School Diary** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *82*).

The content of the **School Diary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **School Diary** panel with any new events, etc. at regular intervals.

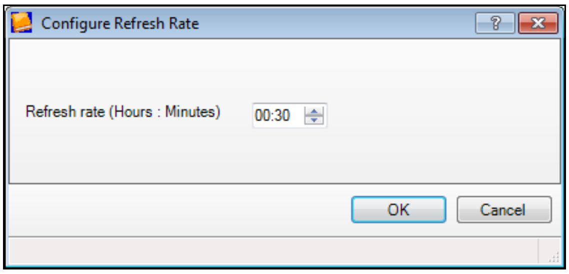
> ***WARNING:*** *Prior to setting a default refresh rate for a panel on the SIMS* ***Home Page****, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

 *Refresh button*

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Refresh Rate** dialog.

Options button



2. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 30 minutes.
3. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing the School Diary on page *39*

Configuring the My Messages Panel

All messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**. This includes system messages if a message that you have sent to another SIMS user cannot be delivered.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Messages** panel has been selected to display on the SIMS Home Page (please see *Adding Panels to the Home Page* on page *82*).

The content of the **My Messages** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **My Messages** panel with any new messages at regular intervals.

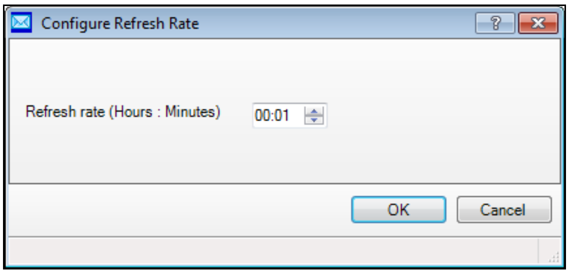
WARNING: *Prior to setting a default refresh rate for a panel on the SIMS Home Page, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Refresh Rate** dialog.

Options button



2. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 1 minute.
3. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing My Messages on page *44*

Configuring the Missing Register Notification Panel

This section is applicable only to users with Attendance Manager permissions.

It is possible to display a list of registers that have not been completed within a specified number of minutes after a lesson or session starts.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **Missing Register Notification** widget has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *82*).

The content of the **Missing Register Notification** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **Missing Register Notification** panel with any new messages at regular intervals.

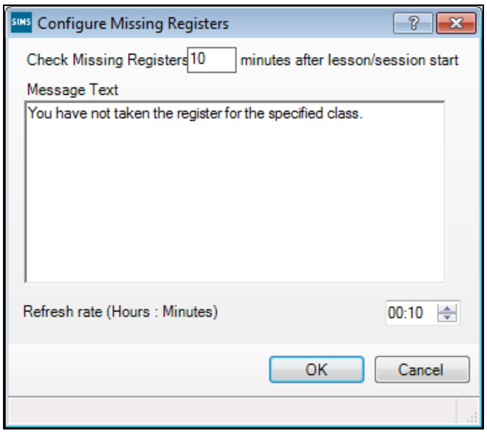
WARNING: *Prior to setting a default refresh rate for a panel on the SIMS* ***Home Page****, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Missing Registers** dialog.

 *Options button*



2. Enter the number of minutes after a lesson/session starts that you wish to check for missing registers in the **Check Missing Registers** field.
3. The **Message Text** you wish to send with the notification can be defined. The default message is:

   You have not taken the register for the specified class.
4. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 10 minutes. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.

   IMPORTANT NOTE: *By default, the content of the* ***Missing Registers Notification*** *panel is refreshed every ten minutes. If you elect to check for missing registers 15 minutes after a lesson or session starts, the period of time before the* ***Missing Registers Notification*** *panel displays this information may be up to 25 minutes after the lesson or session starts. It is important to bear this in mind when setting the notification delay.*
5. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing Missing Register Notifications on page *55*

Configuring the My Detention Sessions Panel

Any detention sessions for which you are the main staff member assigned are displayed in the **My Detention Sessions** widget.

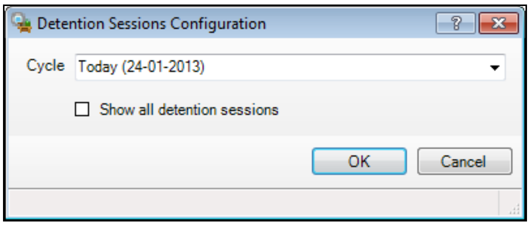
Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Detention Sessions** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *82*).

The content of the **My Detention Sessions** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Detention Sessions Configuration** dialog.

Options button



2. Select the detentions you wish to display selecting the required **Cycle** from the drop-down list. For example, to display detention sessions for the current week for which you are the main supervisor, select **Current Week (<Start Date of the current week> to <End Date of the current week>)**.
3. To display all detention sessions over the selected **Cycle**, regardless of whether they are the main supervisor, select the **Show all detention sessions** check box.
4. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

> *NOTE: If you elect to display all detention sessions over the selected **Cycle**, the panel is renamed **All Detention Sessions Scheduled** when you return to the Home Page.*

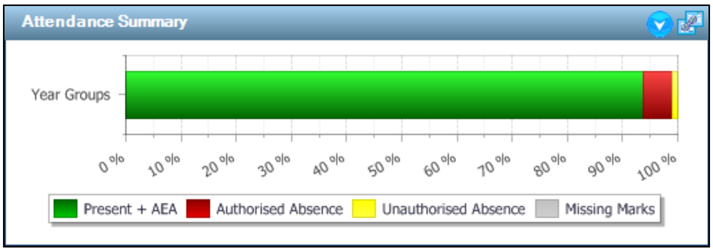
More Information:
Viewing My Detention Sessions on page *58*

Configuring the Attendance Summary Panel

A summary of pupil/student's attendance can be displayed in the Attendance Summary widget on the SIMS **Home Page**, enabling the monitoring of their progress.

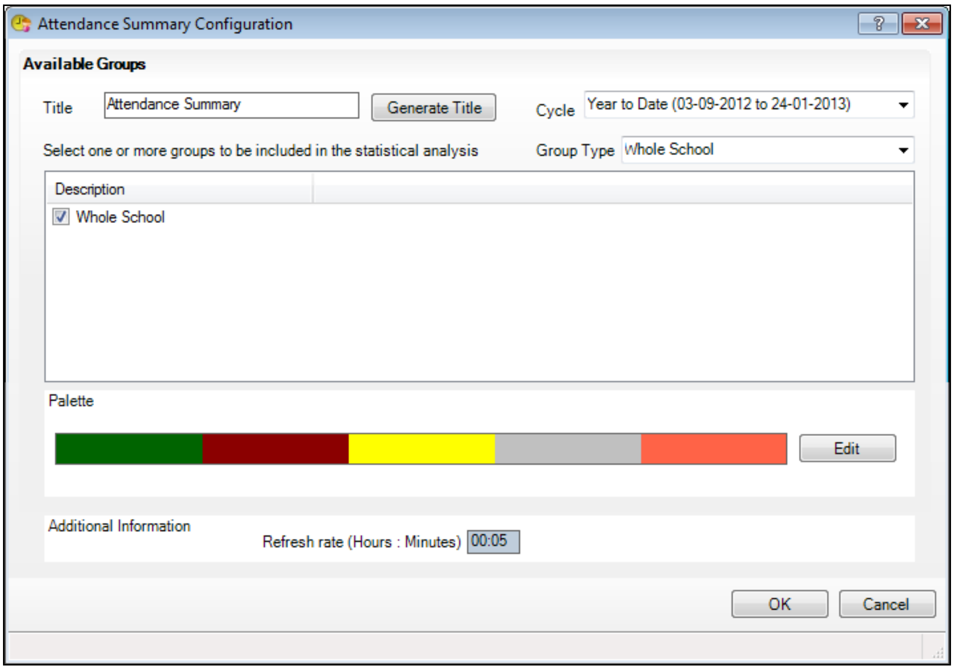
Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Attendance Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Attendance Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).



1. In the appropriate Attendance Summary panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Attendance Summary Configuration** dialog.

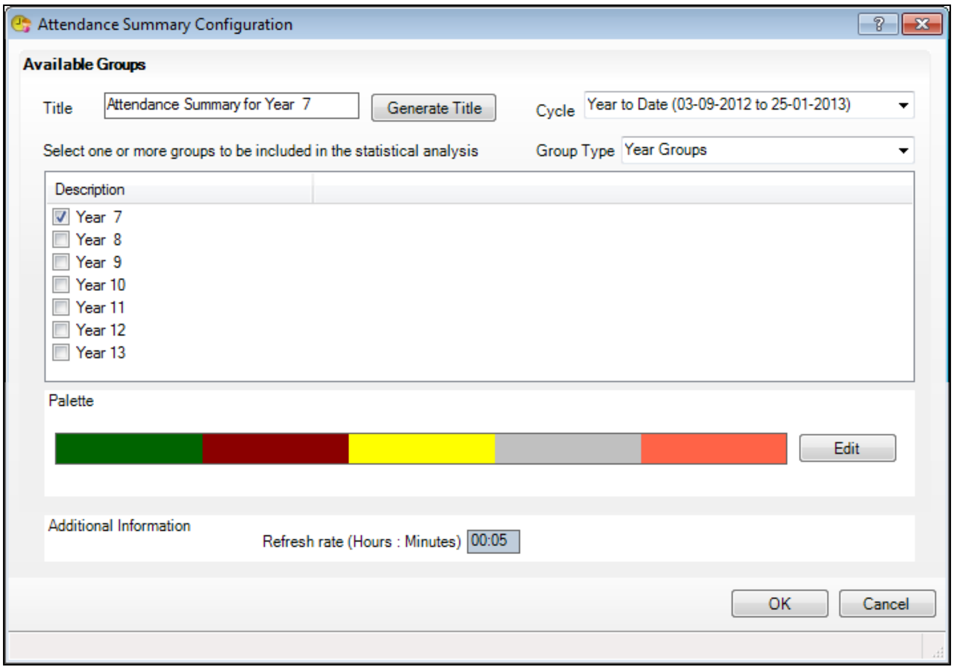
Options button



2. Select the period over which you wish to display attendance information by selecting the required **Cycle** from the drop-down list. For example, to display attendance from the first day of the academic year to today's date, select **Year to Date (<Start Date of the current academic year> to <Today's date>)**.

> *NOTE: The **Cycle** drop-down menu enables you to select dates from the current academic year only.*

3. Select the group(s) that you wish to associate with this panel.
   a. Select the required **Group Type** from the drop-down list (e.g. **Year Groups**, **Reg Groups**, etc.). The content of the table displayed below changes, depending on the option selected.
   b. Select the check box of the group(s) that you wish to include on the selected panel, e.g. **Year 7**, **11D**, etc.



4. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Attendance Summary**. To match the **Title** with the name of the selected group(s) (e.g. **Attendance Summary for Year 7**, **Attendance Summary for 11D**, etc.), click the **Generate Title** button. Alternatively, delete the text and enter your own title.
5. The colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page *118*) by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor**.
6. Enter the **Refresh rate (Hours:Minutes)** or use the **Up** and **Down** arrow buttons to select the required value. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
7. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
8. Repeat this process for any other instances of the **Attendance Summary** panel that you have elected to display on your Home Page.

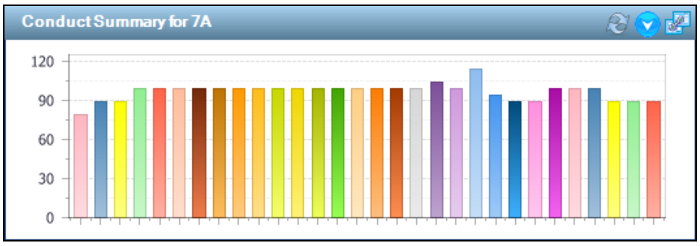
More Information:
Adding Panels to the Home Page on page *82*
Viewing the Attendance Summary on page *59*

Configuring the Conduct Summary Panel

A summary of pupil/student's conduct can be displayed in the **Conduct Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress.

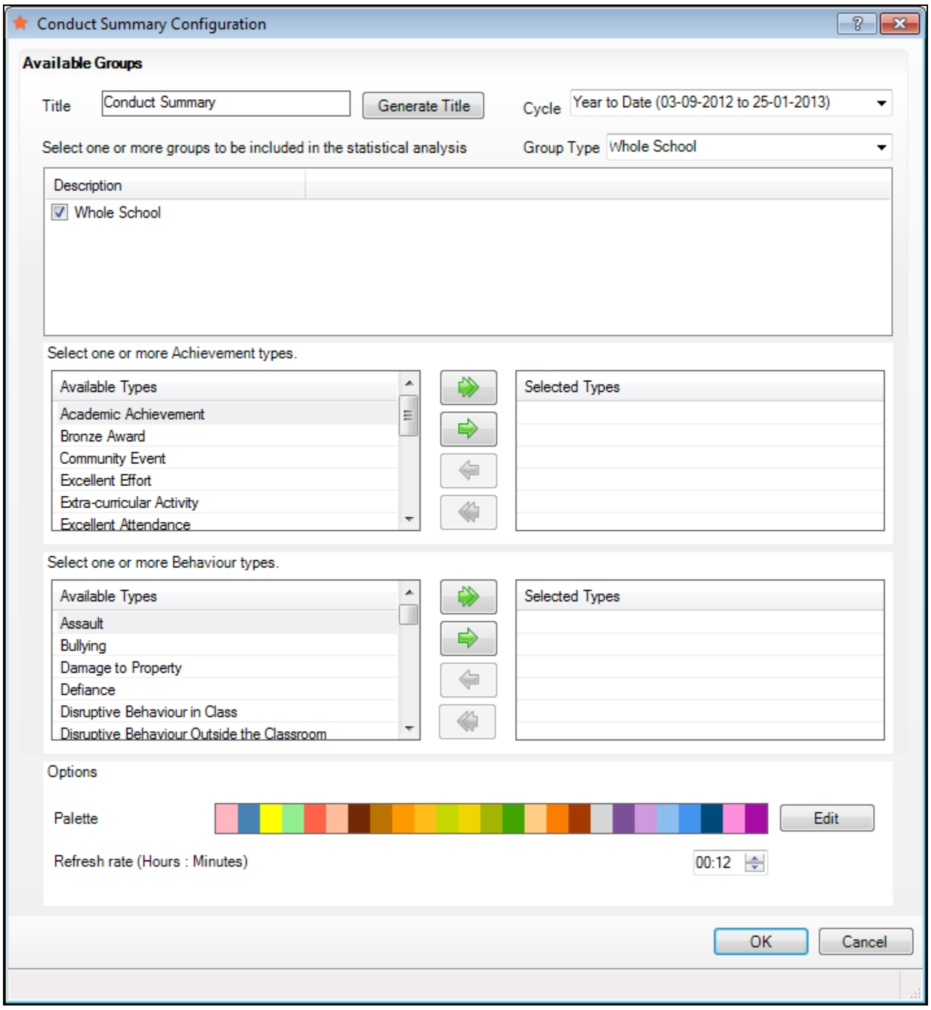
Additional configuration options are available for this widget, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Conduct Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Conduct Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).



1. In the appropriate Conduct Summary panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Conduct Summary Configuration** dialog.

Options button



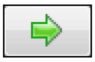
2. Select the period over which you wish to display conduct information by selecting the required **Cycle** from the drop-down list. For example, to display conduct from the first day of the academic year to today's date, select **Year to Date (<Start Date of the current academic year> to <Today's date>)**.

> *NOTE: The **Cycle** drop-down menu enables you to select dates from the current academic year only.*

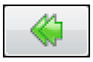
3. Select the group(s) that you wish to associate with this panel.
   a. Select the required **Group Type** from the drop-down list (e.g. **Year Groups**, **Reg Groups**, etc.). The content of the table displayed below changes, depending on the option selected.
   b. Select the check box of the group(s) that you wish to include on the selected panel, e.g. **Year 7**, **7A**, etc. If **Classes** is selected from the **Group Type** drop-down list, select the required check box(es) from the **Course** table to populate the **Class** table. Select the required check box(es) of the classes you wish to include on the selected panel.

4. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Conduct Summary**. To append the **Title** with the name of the selected group(s) (e.g. **Conduct Summary for Year 7**, **Attendance Summary for 7A**, etc.), click the **Generate Title** button. Alternatively, enter a title of your choosing.
5. Select the achievement types and behaviour types you wish to display on the **Conduct Summary** panel.
   a. In the **Select one or more Achievement types** chooser, highlight the required achievement type then click the **Select** button. Multiple achievement types can be selected using **Ctrl + click** and **Shift + click** functionality then clicking the **Select** button. To select all achievement types in the list, click the **Select all** button. Achievement types added in error can be removed using the same highlighting method then clicking the **Remove** or **Remove all** button.

       *Select all button*

       *Select button*

       *Remove button*

       *Remove all button*

   b. Repeat Step 5a to select the required behaviour types in the **Select one or more Behaviour types** chooser.

> *NOTE: To enable the effective display of conduct information, you are strongly advised to add no more than 30 achievement and behaviour types to the Conduct Summary panel. Printed output of the panel will also be more difficult to view if a larger number of types are displayed and some types may not fit onto the printed output.*

6. The colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page *118*) by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor**.
7. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 12 minutes. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
8. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Conduct Summary** panel that you have elected to display on your Home Page.

More Information:
Adding Panels to the Home Page on page *82*
Viewing the Conduct Summary on page *63*

Configuring the Assessment Summary Panel

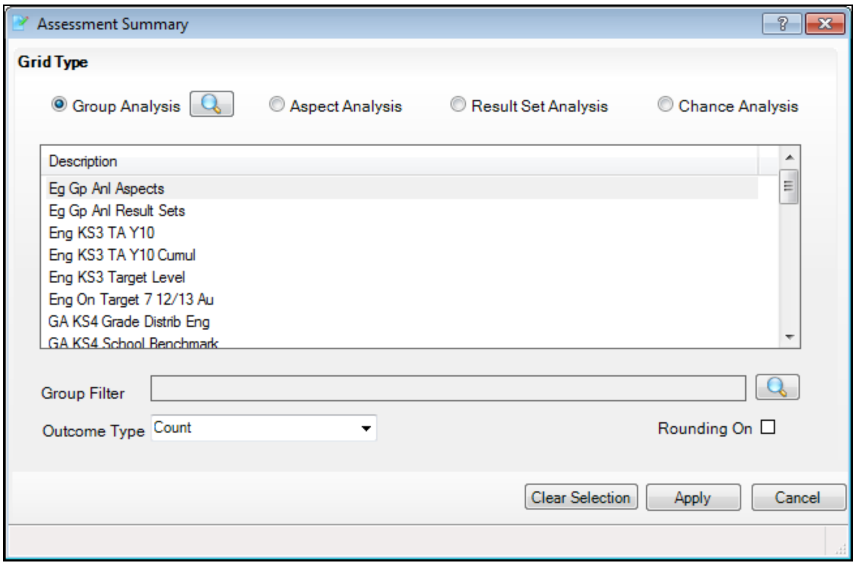
A summary of pupil/student assessment can be displayed in the Assessment Summary widget on the SIMS **Home Page**, enabling the monitoring of their progress.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Conduct Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Conduct Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).

1. In the appropriate **Assessment Summary** panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Assessment Summary** dialog.

Options button



2. Select the radio button of the required **Grid Type**. For more information on analysis types, please refer to the appropriate analysis type chapter in the *Analysis in SIMS* handbook.
3. Select the analysis you want to include in the summary, e.g. a **Result Set** analysis of all Key Stage 2 English Tests for Year 7.
4. Click the **Group Filter** Browser button to apply a filter to the analysis. For example, you may want to filter the analysis to include only pupil/students who are **Travellers**. For more information, please refer to the *Entering and Reviewing Data Using Marksheets* chapter in the *Administering Assessment* handbook.

*NOTE: Any analysis set up for display in an **Assessment Summary** panel is saved on the SIMS **Home Page** and does not affect the analysis grids in SIMS Analysis.*

5. Select the **Outcome Type** from the drop-down list. For more information, please refer to the *Getting Started with SIMS Analysis 7* chapter in the *Analysis in SIMS* handbook.
6. Select the **Rounding On** check box to apply rounding to the analysis results. For more information, please refer to the *Viewing and Editing an Analysis* chapter in the *Analysis in SIMS* handbook.
7. To clear the display and remove all of the filters, click the **Clear Selection** button.
8. Click the **Apply** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Assessment Summary** panel that you have elected to display on your Home Page.

   When you return to the SIMS **Home Page**, the panel name changes to the name of the analysis selected in Step 2.

More Information:
Adding Panels to the Home Page on page *82*
Viewing the Assessment Summary on page *65*

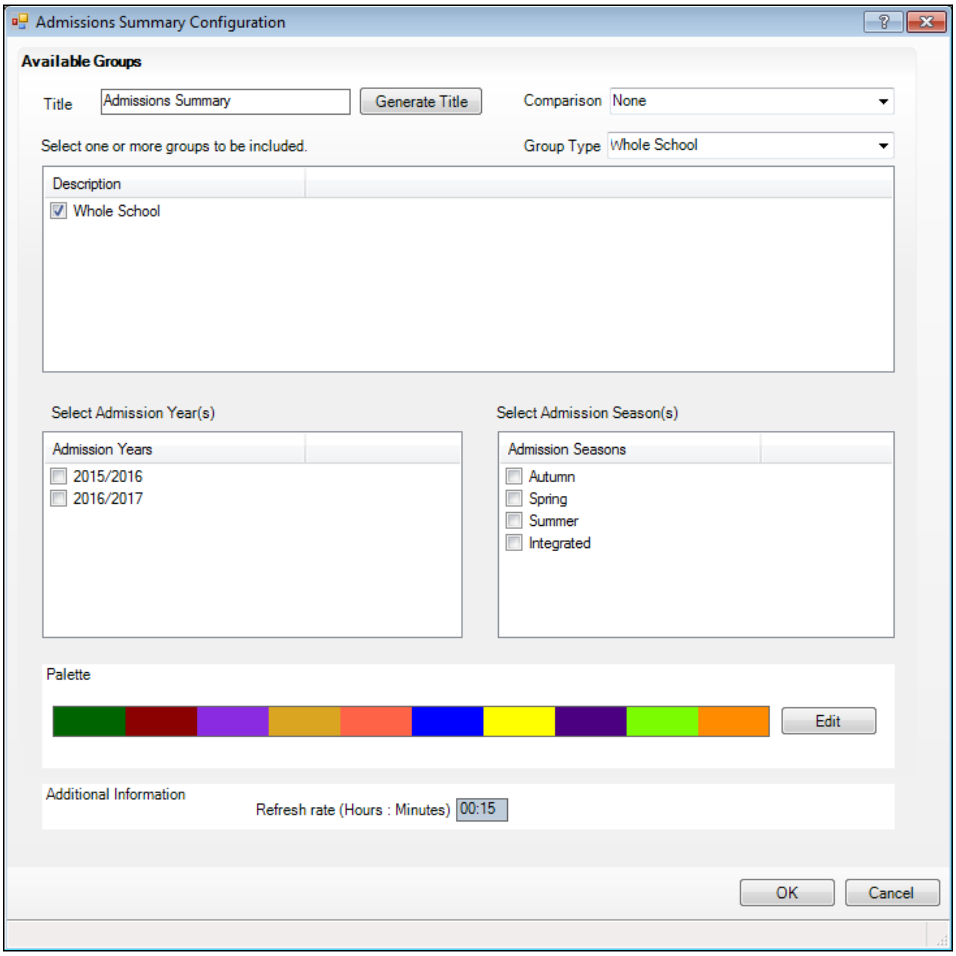
Configuring the Admissions Summary Panel

A summary of the pupil/student admissions can be displayed in the **Admissions Summary** widget on the SIMS **Home Page**, enabling a quick overview of the figures in bar chart format.

The content of the **Admissions Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the SIMS **Home Page** is not already open).

1. Click the **Options** button and then select **Configure** from the drop-down menu to display the **Admissions Summary Configuration** dialog.

 *Options button*



2. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Admissions Summary**. To append the **Title** with the name of the selected group(s) (e.g. **Admissions Summary for Whole School**, **Admissions Summary for Year 8, etc.**), click the **Generate Title** button. Alternatively, enter a title of your choosing.

*NOTE: If multiple **Admissions Summary** widgets are displayed on the SIMS **Home Page**, use unique titles for each one to avoid confusion.*

3. Select a **Comparison** (if required) and a **Group Type** from the respective drop-down lists. Selecting a **Comparison** enables the **Toggle** option in the **Options** drop-down menu, enabling you to switch between the default view and the comparison view.

*NOTE: Viewing a comparison with **Yesterday**, **Last Week** or **Last Month** compares the statuses of the applications within the same **Admissions Year** and **Admissions Season** selected. Viewing a comparison with **Last Year** compares the information in the current academic year with the previous **Admissions Year** you selected.*

4. Select the relevant check box(es) in the **Select one or more groups to be included** panel. The options displayed are based on the **Group Type** selected.
5. Select the relevant check box(es) in the **Select Admission Year(s)** and **Select Admission Season(s)** panels.
6. Click the **Edit** button in the **Palette** panel to display the **Palette Editor**, where the colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page *118*).
7. Enter the **Refresh rate (Hours:Minutes)** or use the **Up** and **Down** arrow buttons to select the required value. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.
8. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Admissions Summary** panel that you have elected to display on the SIMS **Home Page**.

More Information:
Adding Panels to the Home Page on page *82*
Viewing the Admissions Summary on page *67*

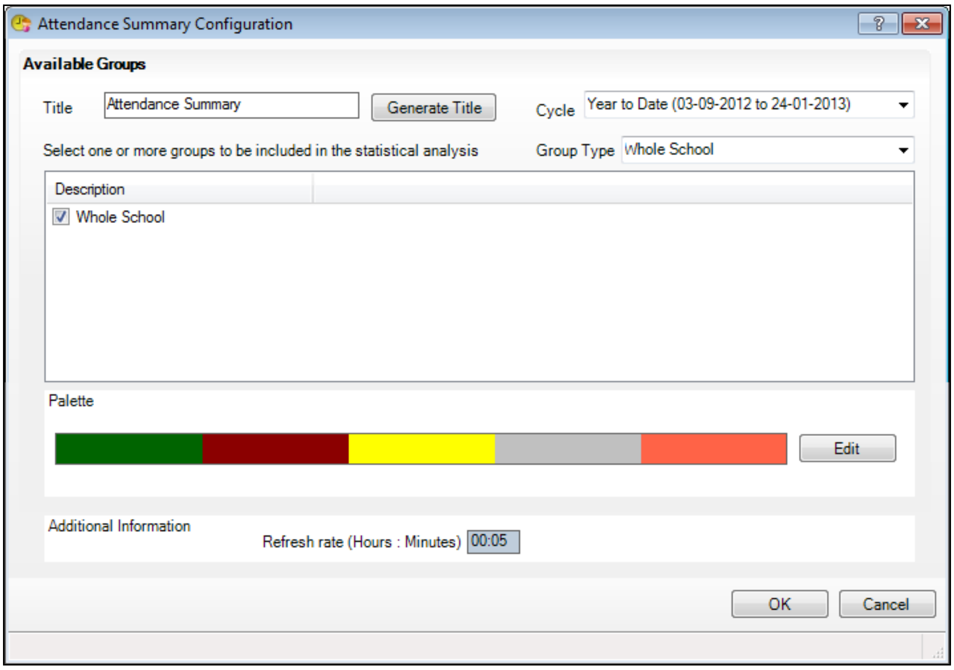
Editing the Chart Colour Scheme

It is possible to edit the colour palette so that each segment of a chart displayed in a summary panel can be coloured differently. This functionality affects the Attendance Summary and the Conduct Summary panels.

This section assumes that the colours on the **Attendance Summary** panel are being configured and that the panel has already been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *82*). The functionality available in the **Conduct Summary** panel, relating to colour selection, works in the same way as it does in the **Attendance Summary** panel. The only difference is the wider range of palette colours that can be displayed on the graph.

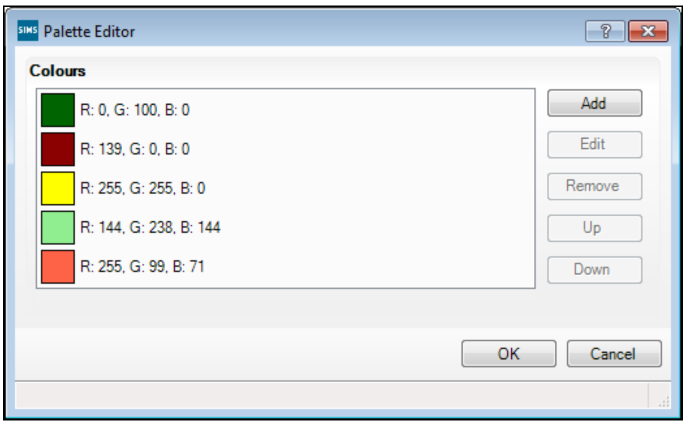
1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Attendance Summary** dialog.

 *Options button*



The colours displayed in the **Palette** section at the bottom of the dialog are the colours that are currently allocated to the graphs displayed in the **Attendance Summary** panel(s) on your Home Page. By default, Attendance Summary panels have five colours available immediately and Conduct Summary panels have 25 colours.

2. To edit the colours you wish to use, click the **Edit** button to display the **Palette Editor**.



3. Add a new colour to the palette by clicking the **Add** button to display the **Color** dialog, select the required colour then click the **OK** button. Alternatively, edit an existing colour by highlighting it, clicking the **Edit** button, selecting the required colour then clicking the **OK** button. The new or edited colour is displayed in the list of **Colours** in the **Palette Editor** dialog.
4. To remove a colour from the palette, highlight it then click the **Remove** button.

   The display order of the colours can be amended, which in turn changes the meaning of the colour on the graph displayed on the summary panels.
5. To switch the order in which the colours are displayed (working downwards from the right-hand side of the pie chart, or working from left to right on the bar chart), click the **Up** and **Down** buttons. To remove a colour, highlight the colour and click the **Remove** button.
6. Click the **OK** button to confirm the colour changes.

   > *NOTE: When removing colours from the **Attendance Summary** pie chart, be aware that it is advisable to have at least the same number of colours as data types, otherwise existing colours may be used twice and could merge, making two segments appear as one.*
7. Click the **OK** button to return to the **Home Page**.

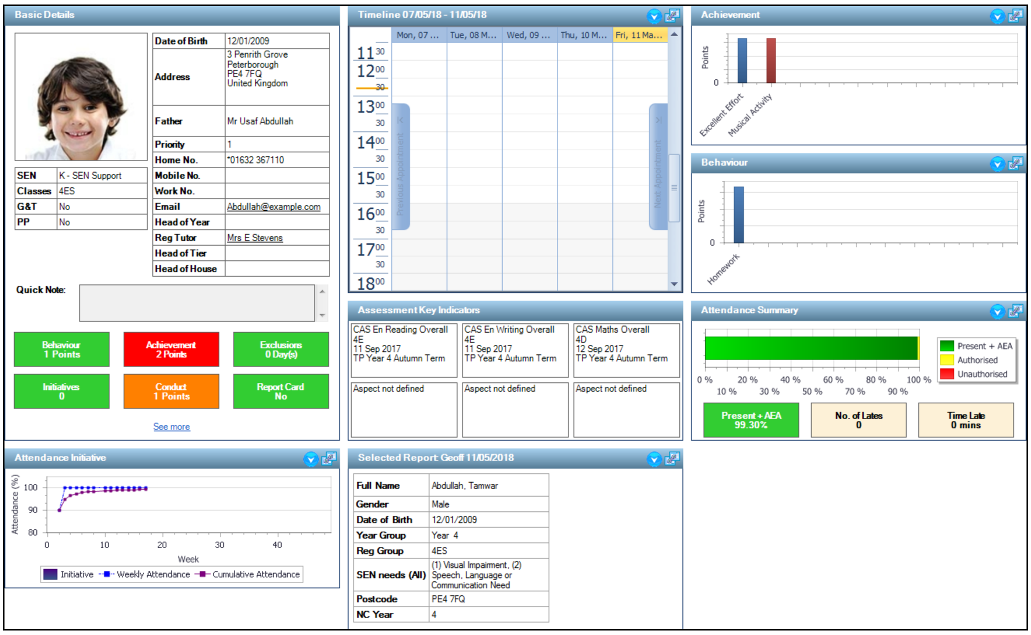
04| Using the Pupil/Student Teacher View

Introduction

The Pupil (or Student) Teacher View provides a summary of the following pupil/student information in read-only format using *widgets*, which function in a similar way to those found on the SIMS **Home Page**:

- Basic details
- Timetable
- Achievements
- Behaviour incidents
- Assessment key indicators
- Attendance

- Attendance initiatives.



Widgets are displayed on the Pupil (or Student) Teacher View by filling any available space on-screen to the right of an existing widget. Where there is no available space on the right-hand side of the screen, the widget is placed in the next available space on the following row. The display of the Pupil (or Student) Teacher View is scalable, therefore reducing the amount of 'white space' on-screen, i.e. reducing the size of the SIMS window alters the layout and re-places the individual widgets accordingly. If a widget is removed from display, the other widgets are re-placed so best use is made of the screen space available.

Some of the widgets enable additional functionality or provide links to other areas of SIMS. The functionality and links are described in the following sections.

The content and layout of the Pupil (or Student) Teacher View is determined partly by your System Manager/Administrator and partly by each SIMS user, providing you have sufficient permissions (please see *Accessing Additional Widget Options* on page *126*).

To use the Pupil (or Student) Teacher View, you must be a member of one or more of the following user groups in SIMS System Manager:

- Assessment Co-ordinator
- Class Teacher
- Curricular Manager
- Pastoral Manager
- Registration Tutor
- SEN Co-ordinator
- Senior Management Team.

More Information:
Viewing Achievement Information on page *136*
Viewing Assessment Key Indicators on page *139*
Viewing the Attendance Summary on page *139*
Viewing Attendance/Conduct Initiative Information on page *141*
Viewing Behaviour Information on page *137*
General Functions Available on the Pupil (or Student) Teacher View on page *125*
Opening the Pupil (or Student) Teacher View on page *124*
Viewing a Pupil/Student's Timeline on page *131*
Viewing Basic Pupil/Student Details on page *127*
Viewing Behaviour, Achievement and Exclusion Details on page *130*

Setting the Purpose of the Pupil/Student Button on the Quick Launch Toolbar

The default behaviour of the left-hand icon on the SIMS **Home Page** quick launch toolbar depends on the type of user:

Pupil (or Student) icon / Pupil (or Student) Teacher View icon

- When a Class Teacher clicks this icon, the **Pupil** (or **Student**) **Teacher View** is displayed by default.
- When any other user clicks this icon, the **Pupil** (or **Student**) **Details** page is displayed by default.

However, the default behaviour of this button can be toggled between the **Pupil** (or **Student**) **Teacher View** and the **Pupil** (or **Student**) **Details** page.

> *NOTE: This setting works on a per user basis, so the definition of the default behaviour of this button affects only the user who makes the change.*

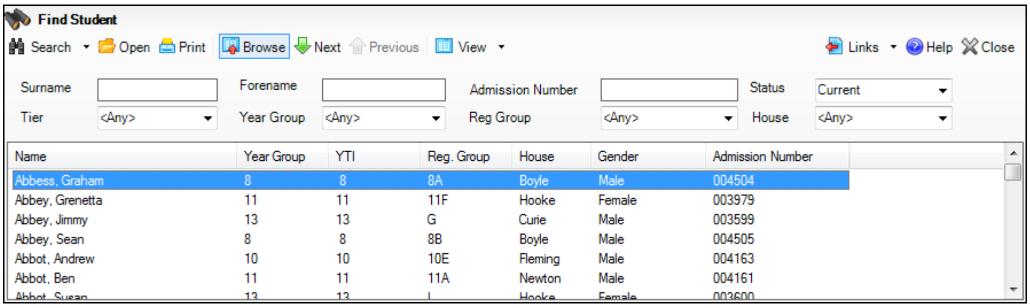
1. If you wish to change the default behaviour of the icon, either select or deselect the **Open Teacher View screen by default** check box in the **Teacher View Defaults** panel.

2. Click the **Save** button.
3. Restart SIMS to affect the change of behaviour of this icon.

   When you hover over the icon, its label changes to either **Pupil** (or **Student**) **Details** or **Pupil** (or **Student**) **Teacher View**, depending on the option selected.

Opening the Pupil (or Student) Teacher View

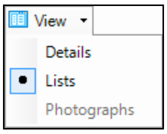
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Teacher View** to display the **Find Student** browser.



2. Enter either all or part of the pupil/student **Surname** and/or **Forename**, or enter their **Admission Number**.
3. Select applicable values from the various drop-down lists to further restrict the list of pupil/students returned.

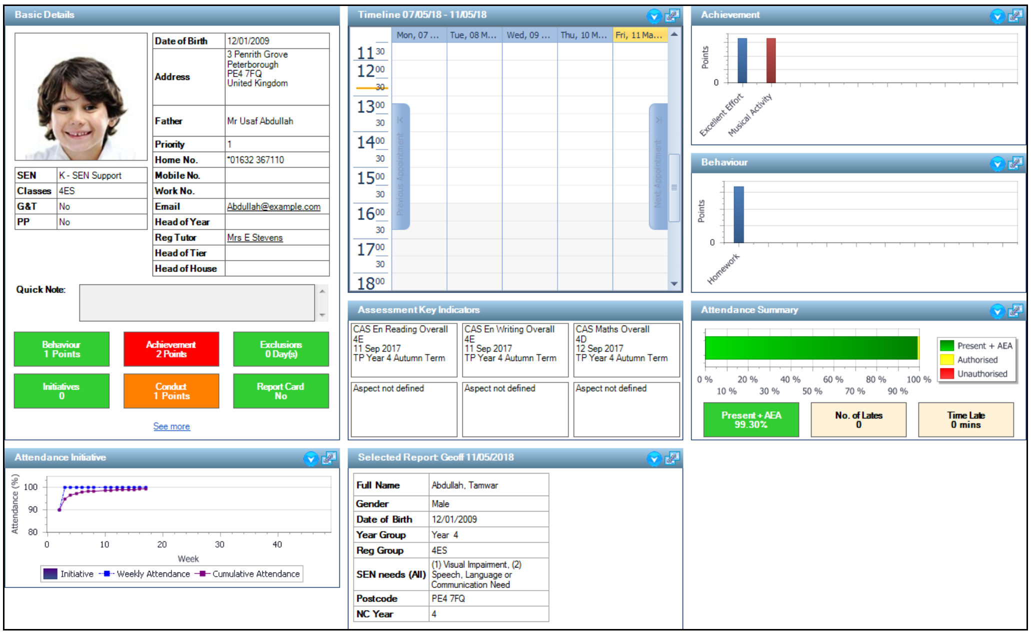
   By default, pupil/students with the **Status** of **Current** are listed but this can be changed by selecting from the drop-down list.

   Leaving all fields as they are will display all current students.

   If you prefer to search for **Lists** of pupil/students or would like to view pupil/students who have a **Photograph** attached to their details, select either of these options from the **View** drop-down list. The default search option is set to display **Details**.
4. Click the **Search** button to list all pupil/students who match the search criteria specified.

5. Highlight the required pupil/student then click the **Open** button to display the **Pupil** (or **Student**) **Teacher View**. The pupil/student's name is displayed in the header of the page, together with the name of their class or registration group.



General Functions Available on the Pupil (or Student) Teacher View

A number of options are available for the majority of widgets on the Pupil (or Student) Teacher View. These are described in the following sections.

Toggling Between Minimised and Full Screen View of a Widget

Many of the widgets on the **Pupil** (or **Student**) **Teacher View** can be expanded to display its content in full screen mode. This is particularly useful if a widget contains a lot of information, which may be difficult to read in the default view.

Click the **Expand** button to maximise the required widget to full screen mode.

Once maximised, the widget can be reduced to its original size by clicking the **Restore** button.

 *Expand button*

 *Restore button*

If a widget is expanded when you exit SIMS, it will be restored to its original size the next time you log into SIMS.

The following widgets can be expanded to full screen view:

- Timeline
- Achievement
- Behaviour
- Attendance Summary
- Attendance Initiative/Conduct Initiative (when expanded, conduct and attendance are plotted on the same graph. Conduct can be monitored using the y1 axis and attendance can be monitored using the y2 axis).

Accessing Additional Widget Options

Many of the widgets on the Pupil (or Student) Teacher View can be configured on a per user basis.

Click the **Options** button to display a pop-up menu.

Options button

The options available depend on the nature of the widget.

The following widgets have additional options:

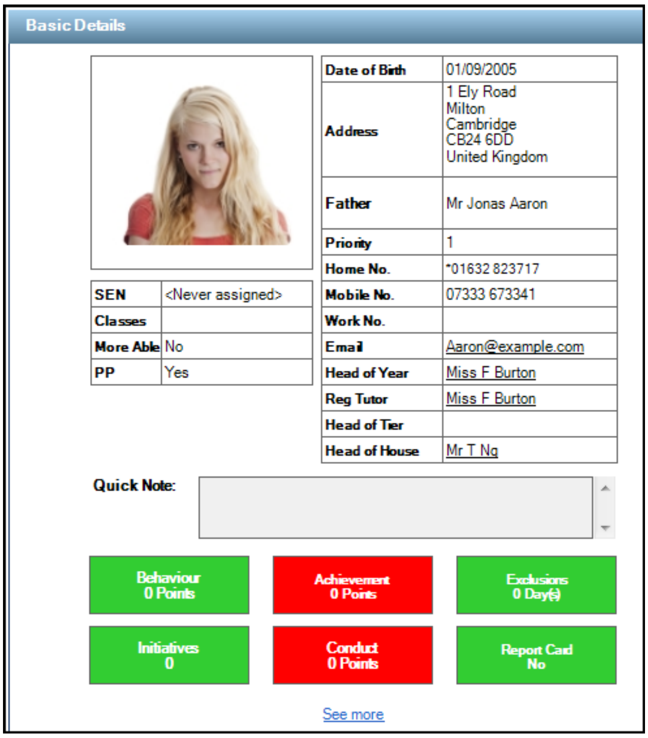
- Timeline
- Achievement
- Behaviour
- Attendance Summary
- Attendance Initiative.

More Information:

Viewing a Pupil/Student's Timeline on page *131*
Viewing Achievement Information on page *136*
Viewing Behaviour Information on page *137*
Viewing the Attendance Summary on page *139*
Viewing Attendance/Conduct Initiative Information on page *141*

Viewing Basic Pupil/Student Details

The **Basic Details** widget on the Pupil (or Student) Teacher View displays a range of information about the selected pupil/student.



If a photograph of the pupil/student is stored in SIMS, it is displayed in the top left-hand corner of the widget.

SEN, **Classes** (the class or lesson they are currently attending) and More Able and Talented (previously **G&T**) summary information is displayed beneath the pupil/student's photograph. Clicking one of these headings opens the area in SIMS where this information is recorded, enabling you to edit the content.

Hyperlink	SIMS Functionality
SEN	**Student SEN details** page (also available via **Focus | Pupil** (or **Student**) **| Special Educational Needs**)
Classes	**Classes for Student** page (also available via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details | Links** panel **| Classes**)
More Able	**Student SEN details** page (also available via **Focus | Pupil** (or **Student**) **| Special Educational Needs**)

To facilitate the analysis of pupil/student learning needs, the Pupil Premium indicator (**PP**) is displayed. This functionality is available to Maintained schools in England only.

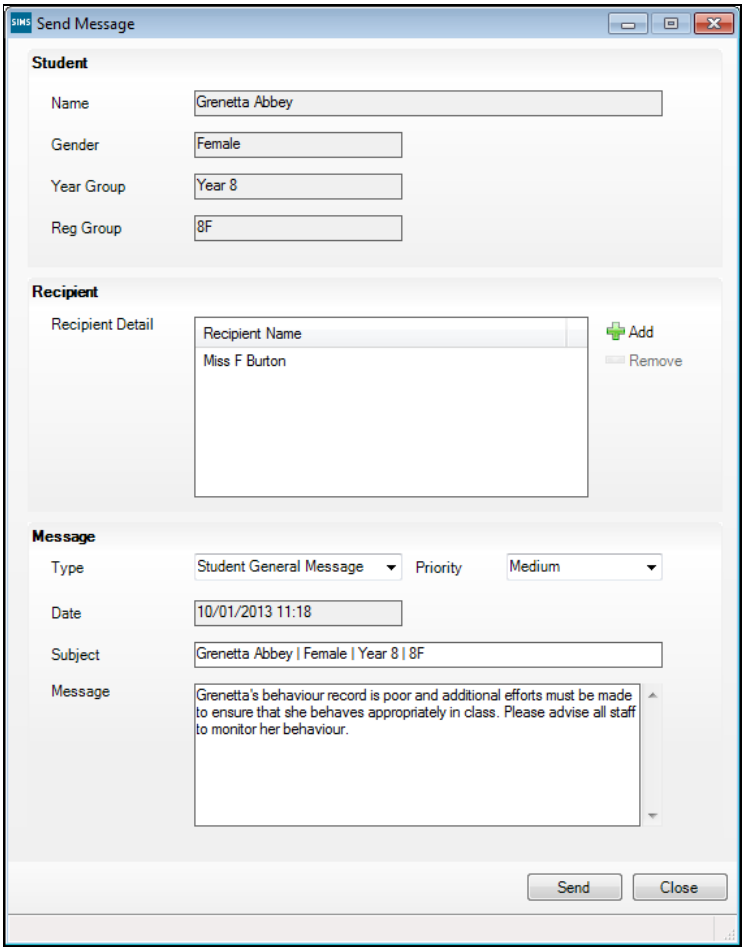
Pupil/student personal details are displayed on the right-hand side of the widget, together with contact details for the person with Priority 1 status.

> *NOTE: If more than one person has been assigned as the Priority 1 contact, the person who was first recorded as being the Priority 1 contact is displayed. A Primary telephone number (if recorded) is indicated by an asterisk (*). If a Primary telephone number is not recorded, the Main number is displayed.*

Sending a SIMS Internal Message to Linked Staff

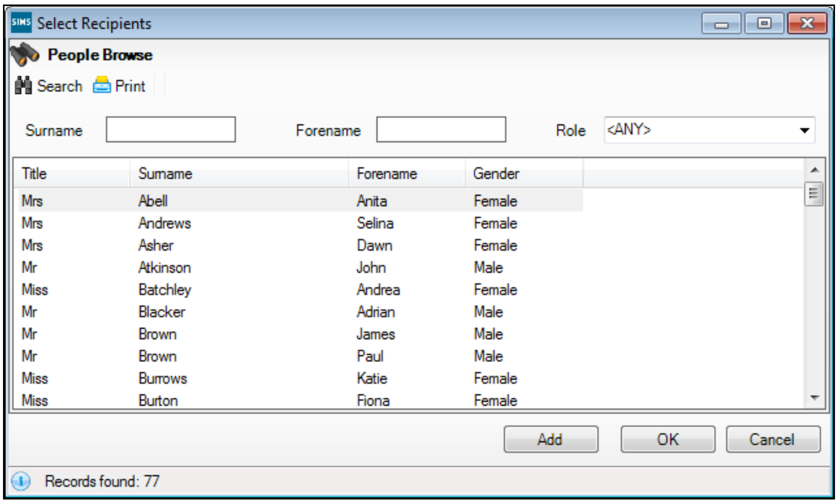
SIMS Internal messages can be sent to any of the people named on the Pupil (or Student) Teacher View.

1. Click the name of any of the following types of pupil/student contact to display the **Send Message** dialog.
   - **Head of Year**
   - **Reg Tutor**
   - **Head of Tier**
   - **Head of House**



The **Pupil** (or **Student**) panel displays basic details about the selected pupil/student. The **Recipient** panel displays the name of the person to whom the message will be sent (**Recipient Name**).

2. To record additional recipients of this message, click the **Add** button to display the **Select Recipients** dialog.



3. Search for, then highlight the required recipient(s). Multiple recipients can be selected using **Ctrl + click** (to select multiple individuals) and **Shift + click** (to select a block of recipients).
4. Click the **Add** button to add them as a recipient.
5. Click the **OK** button to return to the **Send Message** dialog. The people selected are displayed in the **Recipient Detail** table. People can be removed from the list of recipients by highlighting their name then clicking the **Remove** button.

   The **Message** panel enables you to define the content of the message.
6. Select the message **Type** from the drop-down list. This defaults to **Student General Message**.
7. Select the **Priority** of the message from the drop-down list. If the intended recipient has enabled this functionality, notification of the receipt of a **High** priority message is displayed in a pop-up window on the bottom right-hand corner of the SIMS screen. The notification for high priority messages can be enabled via **Tools | Setup Message Options**.

   The **Date** field is populated automatically.

   The **Subject** field is populated automatically with the pupil/student's name, gender, year group and registration group/class but can be edited.
8. Enter the required **Message** text.
9. Click the **Send** button.

   The message is sent to the intended recipients and can be viewed via the **My Messages** panel on their SIMS **Home Page**. All sent messages are retained and can be accessed via **Focus | Alerts | General Messages**.

Viewing the Quick Note

Providing you have sufficient permissions, any important notes that have been recorded as a **Quick Note** are available to view.

Viewing Behaviour, Achievement and Exclusion Details

The bottom section of the **Basic Details** widget provides a summary of the pupil/student's behaviour, achievement and exclusion records for the current academic year. The boxes are colour coded green (indicating generally good behaviour, good level of achievement, etc.) and red (indicating generally poor behaviour, conduct, etc.). The colour of the boxes depends on the range of values entered during the Pupil (or Student) Teacher View setup process.

You can display the area in SIMS where the data is recorded by clicking in the appropriate box.

Hyperlink Name	SIMS Functionality Displayed
Behaviour	**Behaviour Management** page (also available via **Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour | Behaviour** panel)
Achievement	**Behaviour Management** page (also available via **Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour | Achievement** panel)
Exclusions	**Exclusion Details** page (also available via **Focus | Pupil** (or **Student**) **| Exclusions**)
Initiatives	**Behaviour Management** page (also available via **Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour | Initiatives** panel)
Conduct	**Behaviour Management** page (also available via **Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour | Net Points** in the **Academic Year** panel)
Report Card	**Behaviour Management** page (also available via **Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour | Report Card** panel)

Viewing Emergency Contact Details for the Selected Pupil/Student

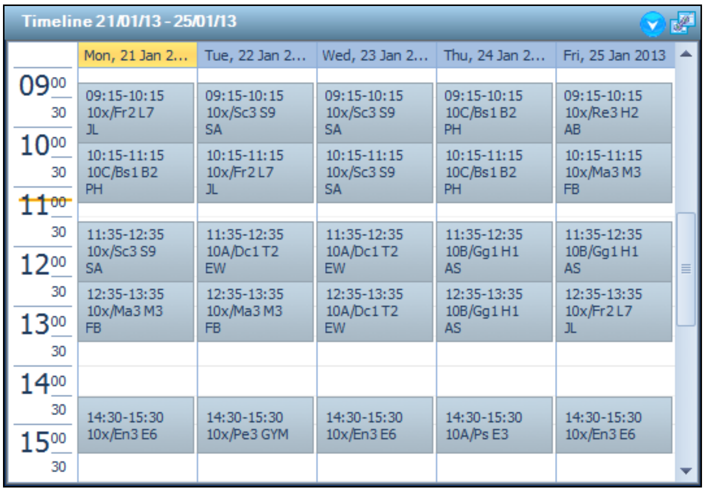
Click the **See more** hyperlink at the bottom of the **Basic Details** widget to display the **Pupil** (or **Student**) **Emergency contacts** dialog.

Any contact with a Priority 1 or 2 setting is displayed. A Primary telephone number (if recorded) is indicated by an asterisk (*****). If a Primary telephone number is not recorded, the Main number is displayed. If an email address has been recorded for this contact, an email can be sent by clicking the address in the **Email** field to open a blank but addressed message in your default email client.

Click the **Cancel** button to return to the Pupil (or Student) Teacher View.

Viewing a Pupil/Student's Timeline

The pupil/student's timetable is displayed in the **Timeline** widget on the Pupil (or Student) Teacher View.



By default, the selected pupil/student's timetable is displayed for the current working week. Today's date is indicated on the timeline by a yellow highlight on the date in the heading row. In the previous graphic, today's date is Monday 21 January 2013. The scope of the view is displayed in the panel header. In the previous graphic, the timetable for the period Monday 21 January 2013 to Friday 25 January 2013 is displayed.

NOTE: The current time can be deduced by viewing the intersection of the highlighted date in the column header and the highlighted time bar displayed in the row header.

A pupil/student's lessons, scheduled detention sessions and SEN reviews are displayed over the selected timeframe. Detention sessions that a pupil/student is scheduled to attend are displayed with a red background and SEN reviews are displayed with an amber background, as displayed in the following graphic.

In the previous graphic, a detention session has been scheduled for 15:30-16:00 on Tuesday 26 February 2013. Additionally, a SEN review has been scheduled for 12:30-13:30 on the same date. Only one box per class is displayed, regardless of how many teachers are associated with the group.

The range of options available on the **Timeline** widget are discussed in the following sections.

More Information:

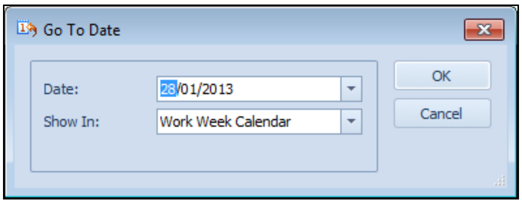
Changing the Displayed Date of the Timeline on page *132*
Changing the Timeline View on page *133*
Printing the Content of the Timeline Widget on page *134*
Sending a Message to Staff on page *136*

Changing the Displayed Date of the Timeline

By default, the selected pupil/student's timetable is displayed for the current working week. This can be changed using right-click functionality in the date bar at the top of the **Timeline** widget. This can be used in conjunction with the **View** options (please see *Changing the Timeline View* on page *133*) to present the required display.

Right-click a date in the heading row at the top of the **Timeline** widget to display a pop-up menu.

- To go to a specific date, select **Go to Date** to display the **Go To Date** dialog.



  a. Enter the required **Date** or select a date from the drop-down list.
  b. Select the required timeline view from the **Show In** drop-down list. The options are **Day Calendar**, **Work Week Calendar**, **Week Calendar**, **Month Calendar**.
  c. Click the **OK** button to return to the Timeline widget.

- To revert to today's date, select **Go to Today**.

*NOTES: The date selected will show the **Timeline** for that date in the selected view (please see* Changing the Timeline View *on page* 133*).*

The display settings are reset the next time you open the Pupil (or Student) Teacher View.

Changing the Timeline View

The display can be amended to show a pupil/student's timetable in one of the following formats:

Timeline View	What is Displayed?
Day View	Displays the pupil/student's timetable for today only.
Work Week View	Displays the pupil/student's timetable for the current working week. This is the default view.
Week View	Displays only events for which the pupil/student is timetabled for the whole week (including weekends).
Month View	Displays only events for which the pupil/student is timetabled for the whole month (including weekends).

Right-click a date in the column heading at the top of the **Timeline** widget to display a pop-up menu. Alternatively, right-click a time in the row headings to access the same functionality.

Select **Change View To** then one of the following options to achieve the required view:

- Day View
- Work Week View (default)
- Week View
- Month View.

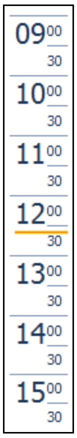
*NOTES: The view selected will show the **Timeline** for the selected timeframe (please see* Changing the Displayed Date of the Timeline *on page* 132*).*

The display settings are reset the next time you open the Pupil (or Student) Teacher View.

Changing the Interval of the Timeline Widget

The time interval can be amended to show the content of the **Timeline** widget in greater detail.

Right-click a date in the row heading on the **Timeline** widget to display a pop-up menu.



The previous graphic shows a 30 minute time interval.

Select one of the following options to achieve the required view:

- 60 Minutes
- 30 Minutes
- 15 Minutes
- 10 Minutes
- 6 Minutes
- 5 Minutes.

NOTES: The current selection is indicated by a tick in the pop-up menu.

*The more regular the interval, the more detailed the view on the **Timeline** widget.*

The display settings are reset the next time you open the Pupil (or Student) Teacher View.

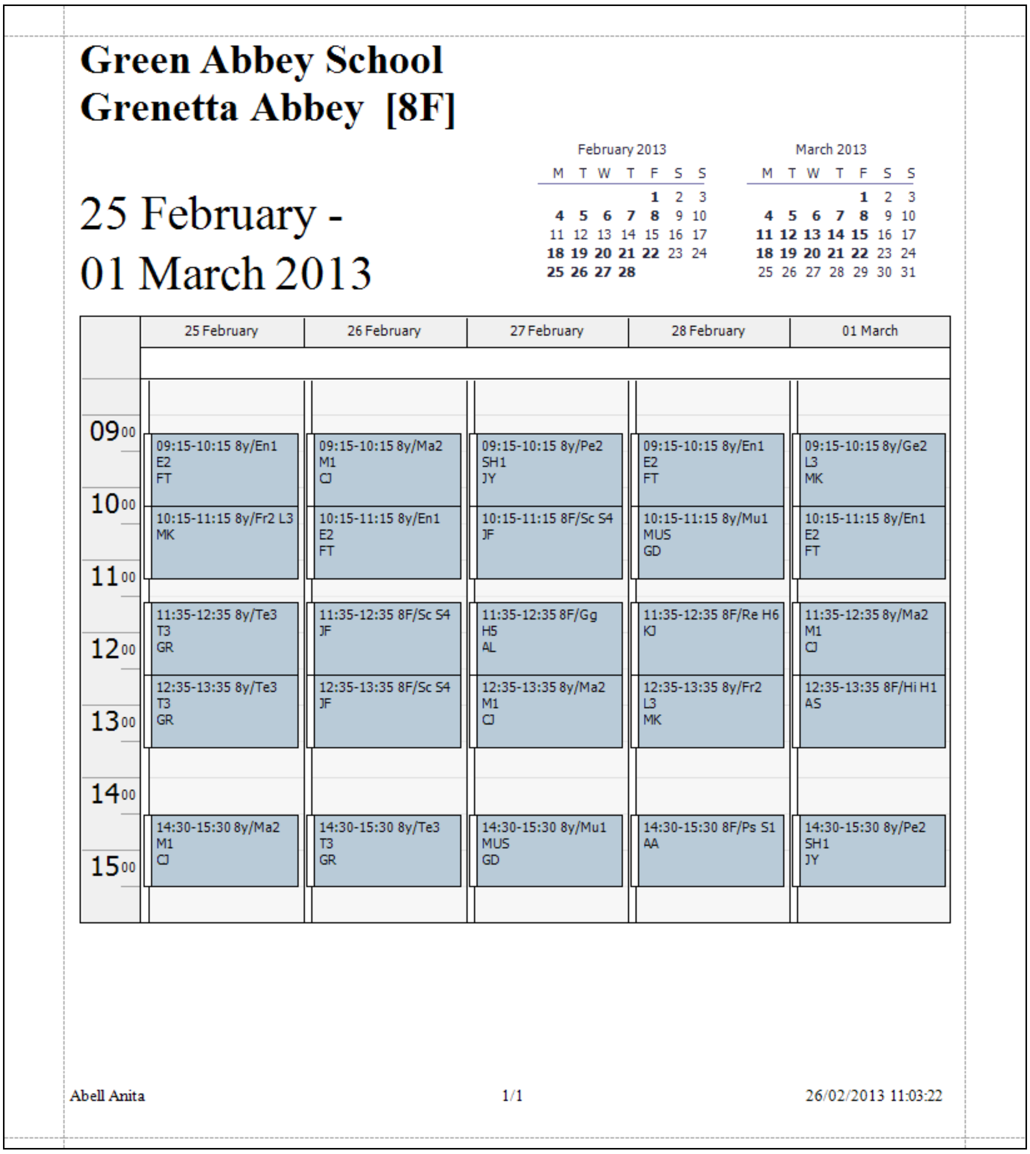
Printing the Content of the Timeline Widget

The content of the **Timeline** widget can be printed. This is the only widget that can be printed independently of the other widgets.

The printed output produces the view of the Timeline displayed on-screen at the time of printing. Therefore, you must prepare the **Timeline** (i.e. select the required timeframe, the view and the interval) prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the **Preview** page.

 *Options button*



Green Abbey School
Grenetta Abbey [8F]

25 February -
01 March 2013

February 2013

M	T	W	T	F	S	S
				1	2	3
4	**5**	**6**	**7**	**8**	9	10
11	12	13	14	15	16	17
18	**19**	**20**	**21**	**22**	23	24
25	**26**	**27**	**28**			

March 2013

M	T	W	T	F	S	S
				1	2	3
4	**5**	**6**	**7**	**8**	9	10
11	**12**	**13**	**14**	**15**	16	17
18	**19**	**20**	**21**	**22**	23	24
25	26	27	28	29	30	31

	25 February	26 February	27 February	28 February	01 March
09:00	09:15-10:15 8y/En1 E2 FT	09:15-10:15 8y/Ma2 M1 CJ	09:15-10:15 8y/Pe2 SH1 JY	09:15-10:15 8y/En1 E2 FT	09:15-10:15 8y/Ge2 L3 MK
10:00	10:15-11:15 8y/Fr2 L3 MK	10:15-11:15 8y/En1 E2 FT	10:15-11:15 8F/Sc S4 JF	10:15-11:15 8y/Mu1 MUS GD	10:15-11:15 8y/En1 E2 FT
11:00	11:35-12:35 8y/Te3 T3 GR	11:35-12:35 8F/Sc S4 JF	11:35-12:35 8F/Gg H5 AL	11:35-12:35 8F/Re H6 KJ	11:35-12:35 8y/Ma2 M1 CJ
12:00	12:35-13:35 8y/Te3 T3 GR	12:35-13:35 8F/Sc S4 JF	12:35-13:35 8y/Ma2 M1 CJ	12:35-13:35 8y/Fr2 L3 MK	12:35-13:35 8F/Hi H1 AS
13:00					
14:00	14:30-15:30 8y/Ma2 M1 CJ	14:30-15:30 8y/Te3 T3 GR	14:30-15:30 8y/Mu1 MUS GD	14:30-15:30 8F/Ps S1 AA	14:30-15:30 8y/Pe2 SH1 JY
15:00					

Abell Anita 1/1 26/02/2013 11:03:22

The preview displays your school name and the pupil/student to whom the timeline relates. The timeframe of the timeline is also displayed, as are minimised calendars for the current and following month. On the minimised calendars, the days that contain a scheduled lesson, detention session or SEN review are displayed in bold.

2. Click the **Print** button to print the pupil/student's timetable

Alternatively, the entire content of the Pupil (or Student) Teacher View can be printed (please see *Printing the Pupil (or Student) Teacher View* on page *144*).

More Information:
Changing the Displayed Date of the Timeline on page *132*
Changing the Timeline View on page *133*
Changing the Interval of the Timeline Widget on page *134*

Sending a Message to Staff

The **Timeline** widget provides the facility to send a General Message to the pupil/student's class teachers.

To send a message to all staff referenced on the pupil/student's **Timeline**, click the **Options** button then select **Message All Staff** from the pop-up menu to display the **Send Message** dialog.

Options button

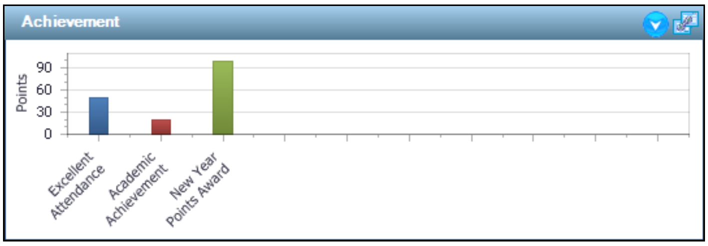
To send a message to the main teacher of a specific class, either double-click the required class on the **Timeline** widget or right-click the class then select **Send Message** from the pop-up menu to display the **Send Message** dialog.

Follow the instructions earlier in this handbook (please see *Sending a SIMS Internal Message to Linked Staff* on page *128*) to send the message to the required recipients. When reading the instructions, please note that the **Recipient** panel is populated automatically with the appropriate member(s) of staff.

More Information:
Sending a SIMS Internal Message to Linked Staff on page *128*

Viewing Achievement Information

A summary of a pupil/student's achievements can be displayed on the Pupil (or Student) Teacher View, enabling the monitoring of their progress.

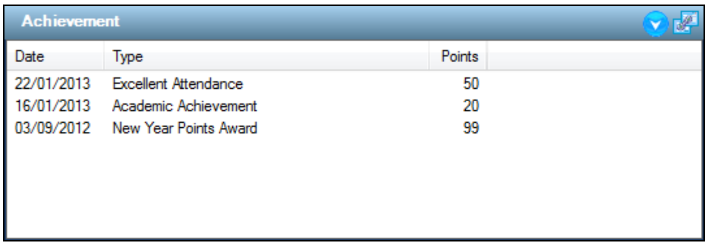


Each achievement recorded for a pupil/student over the course of the current academic year is displayed on a bar chart. The horizontal axis displays each of the achievement types for which an award has been given. The cumulative number of points or number of incidents (as defined during the Pupil (or Student) Teacher View setup process) for each of the achievement types is measured using the vertical axis.

Hover the mouse over a bar to display the number of points awarded for the achievement type or the number of incidents.

The data used to build the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

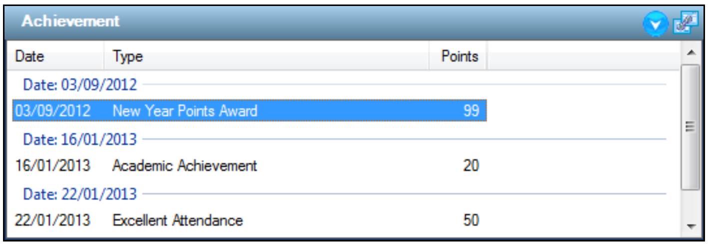
Options button


Achievement

Date	Type	Points
22/01/2013	Excellent Attendance	50
16/01/2013	Academic Achievement	20
03/09/2012	New Year Points Award	99

The **Date** of the achievement, the achievement **Type** and the number of **Points** awarded for each achievement is displayed in table format.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Achievement** widget then select **Date**, **Type** or **Points** from the pop-up menu to display the content in the selected order.


Achievement

Date	Type	Points
Date: 03/09/2012		
03/09/2012	New Year Points Award	99
Date: 16/01/2013		
16/01/2013	Academic Achievement	20
Date: 22/01/2013		
22/01/2013	Excellent Attendance	50

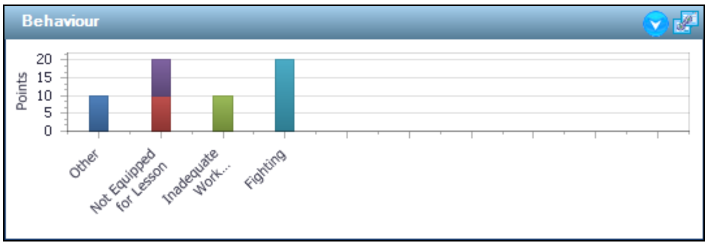
Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To view the full achievement record, double-click the required achievement to display the **Edit Achievement** dialog. The information is displayed in read-only format.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

Viewing Behaviour Information

A summary of a pupil/student's behaviour incidents can be displayed on the Pupil (or Student) Teacher View, enabling the monitoring of their progress.

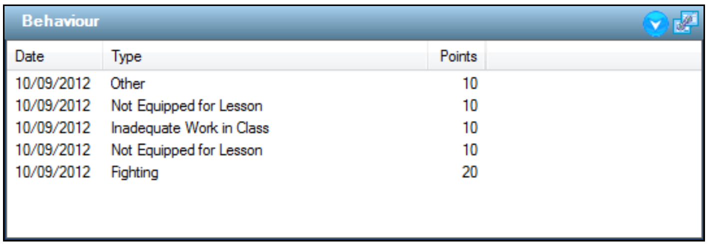


Each behaviour incident recorded for a pupil/student over the course of the current academic year is displayed on a bar chart. The horizontal axis displays each of the behaviour types associated with each of the behaviour incidents recorded against the pupil/student. The cumulative number of points or number of incidents (as defined during the Pupil (or Student) Teacher View setup process) for each of the behaviour types is measured using the vertical axis.

Hover the mouse over a bar to display the number of points associated with the behaviour type or the number of incidents.

The data used to build the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

Options button

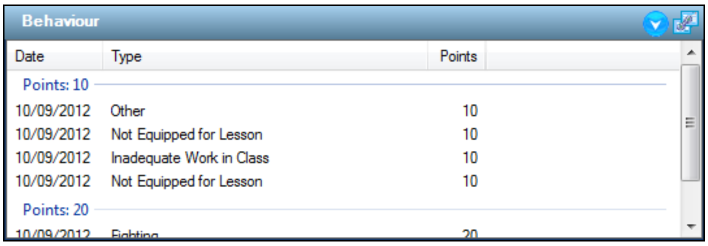


Behaviour

Date	Type	Points
10/09/2012	Other	10
10/09/2012	Not Equipped for Lesson	10
10/09/2012	Inadequate Work in Class	10
10/09/2012	Not Equipped for Lesson	10
10/09/2012	Fighting	20

The **Date** of the incident, the behaviour **Type** and the number of **Points** assigned for each incident is displayed in table format.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Behaviour** widget then select **Date**, **Type** or **Points** from the pop-up menu to display the content in the selected order.



Behaviour

Date	Type	Points
Points: 10		
10/09/2012	Other	10
10/09/2012	Not Equipped for Lesson	10
10/09/2012	Inadequate Work in Class	10
10/09/2012	Not Equipped for Lesson	10
Points: 20		
10/09/2012	Fighting	20

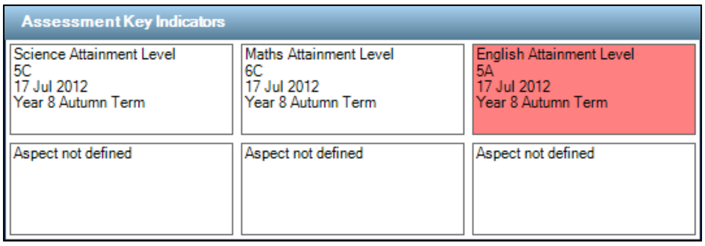
Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To view the full behaviour record, double-click the required behaviour incident to display the **Edit Behaviour** dialog. The information is displayed in read-only format.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

Viewing Assessment Key Indicators

The **Assessment Key Indicators** widget displays up to six definable aspects and their progress.



The previous graphic shows that three aspects have been selected for display during the Pupil (or Student) Teacher View setup process. The remaining three panels have not been defined and display **Aspect not defined**.

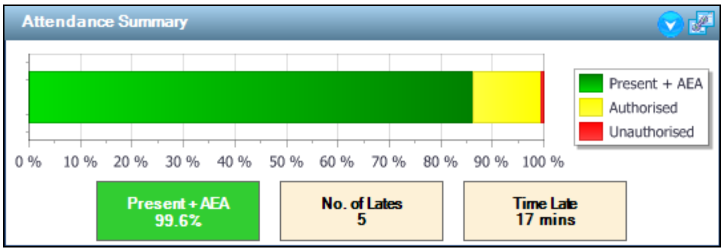
The aspect name, grade, date and result set are displayed. The background colour of a box is determined by the associated marksheet template. If the associated marksheet template contains a grade formula column that incorporates a colour background, the colour associated with the formula outcome is displayed.

Additional Resources:

For more information on setting up marksheet templates, please refer to the *Creating and Maintaining Templates* chapter of the *Creating Assessment Related Components* handbook

Viewing the Attendance Summary

A summary of a pupil/student's attendance record can be displayed on the Pupil (or Student) Teacher View, enabling the monitoring of their progress.

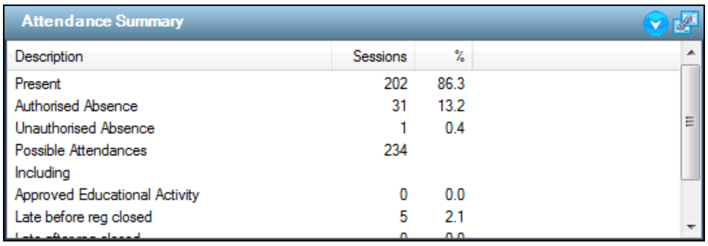


A pupil/student's attendance over the course of the current academic year is displayed on a vertical bar chart. The legend on the right-hand side of the widget displays the scope of the chart, which is the display of all **Present + AEA** (Authorised Educational Activity) marks, together with **Authorised** and **Unauthorised** absences. The horizontal axis displays the cumulative percentage of these marks, starting with a green bar (for present marks), a yellow bar (authorised absences) and a red bar (unauthorised absences).

Hover the mouse over the bar to display the number and percentage of sessions or lessons in each category.

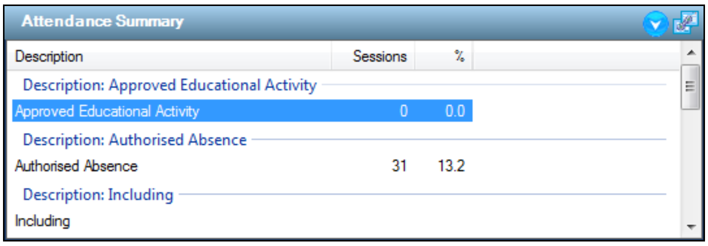
The data used to build the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

 *Options button*



The attendance code **Description**, number of **Sessions** and a percentage (**%**) of total attendance for each attendance code is displayed.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Attendance Summary** widget then select **Description**, **Sessions** or **%** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

Additional information regarding the pupil/student's attendance is available below the graph. The number of lates (**No. of Lates**) and the cumulative number of minutes for all sessions or lessons with a late mark (**Time Late**) are displayed.

A pupil/student's total **Present & AEA** percentage is also displayed. This box is colour coded green (indicating a generally good, positive attendance record) or red (indicating a generally poor attendance record). The colour of the box depends on the range of values entered during the Pupil (or Student) Teacher View setup process (via **Tools | Setups | Pupil** (or **Student**) **Teacher View**).

The percentage attendance figure is calculated as follows:

Percentage Attendance = <number of present marks> plus <number of approved educational absence marks> divided by <number of possible marks>

To view a pupil/student's full attendance record, click the **Present & AEA** hyperlink to display the **Pupil** (or **Student**) **Marks** page. The information is displayed in read-only format.

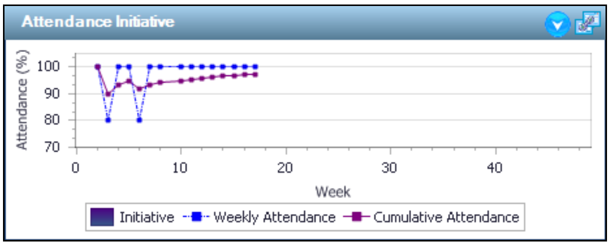
IMPORTANT NOTES: *Authorised Educational Activity marks are treated as a present mark on the Pupil (or Student) Teacher View.*

If a mark is entered in Take Register for a future session or lesson, this is included in the figures on the Pupil (or Student) Teacher View.

Viewing Attendance/Conduct Initiative Information

A summary of a pupil/student's attendance and conduct records can be displayed on the Pupil (or Student) Teacher View, together with pupil/student initiative dates, enabling the monitoring of their progress.

The view can be toggled between **Attendance Initiative** and **Conduct Initiative** by clicking the **Options** button then selecting **Toggle** from the drop-down menu. The **Attendance Initiative** widget is displayed by default.



A pupil/student's session (not lesson) attendance over the course of the current academic year is displayed on a line graph on the **Attendance Initiative** widget. The x-axis (horizontal) represents the working week of the academic year for which attendance can be recorded, i.e. attendance is not recorded during school holidays so these weeks (if they are complete working weeks) are not plotted on the graph. If a school holiday ends on one day of a working week and a new term starts on the next day of a working week, these partial working weeks are displayed on the graph. The attendance percentage values are displayed on the y-axis (vertical). Two sets of values are plotted on the line graph - the cumulative attendance percentage over the course of the current academic year and a separate weekly attendance percentage. In the previous graphic, the cumulative attendance percentage remained at 100% until week 21, when the pupil/student was present for only 33% of their sessions, indicated by the dotted blue line. This caused the cumulative attendance percentage (the dotted purple line) to be reduced to 99% in week 21.

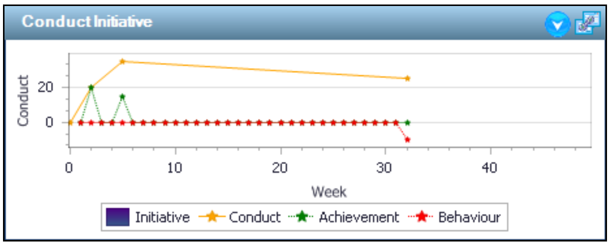
The percentage attendance figure is calculated as follows:

Percentage Attendance = <number of present marks> plus <number of approved educational absence marks> divided by <number of possible marks>

Hover the mouse over any of the dots on the line graph. The following information is displayed:

- Week commencing date
- Cumulative attendance percentage or weekly attendance percentage (depending on the line over which you hover, displayed to two decimal places)
- Number of present marks (**Present + AEA**)
- Number of authorised absence marks
- Number of unauthorised absence marks.

If an initiative record has been recorded against a pupil/student's behaviour record, this is indicated by a vertical purple line in the corresponding week. The initiative(s) displayed on the Attendance Initiative graph may not relate specifically to attendance. However they are displayed to provide an indication of whether (and subsequently how) a pupil/student's attendance or behaviour has changed since the initiative measures were introduced. Hover the mouse over the initiative line to display the week commencing date, the date on which the initiative was made and the initiative type.



A pupil/student's conduct, behaviour and achievement details over the course of the current academic year are displayed on a line graph on the **Conduct Initiative** widget. The x-axis (horizontal) represents the working week of the academic year for which these details can be recorded, i.e. conduct, behaviour and achievement are not recorded during school holidays so these weeks (if they are complete working weeks) are not plotted on the graph. If a school holiday ends on one day of a working week and a new term starts on the next day of a working week, these partial working weeks are displayed on the graph. The conduct point values are displayed on the y-axis (vertical). Three sets of values are plotted on the line graph - conduct (yellow line), achievement (green line) and behaviour points (red line) over the course of the current academic year. In the previous graphic, achievement points (also viewed as a positive) were recorded in week one and behaviour points (viewed as a negative) were recorded in week two. Conduct points (an aggregate of achievement and behaviour points) were therefore recorded in weeks one and two.

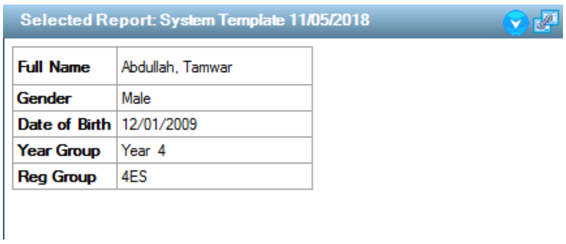
Hover the mouse over any of the dots on the line graph. The following information is displayed:

- Week commencing date
- Date on which conduct, achievement or behaviour points were recorded (depending on the line over which you hover)
- Achievement type or behaviour type recorded

If an initiative record has been recorded against a pupil/student's behaviour record, this is indicated by a vertical purple line in the corresponding week. Hover the mouse over the initiative line to display the week commencing date, the date on which the initiative was made and the initiative type.

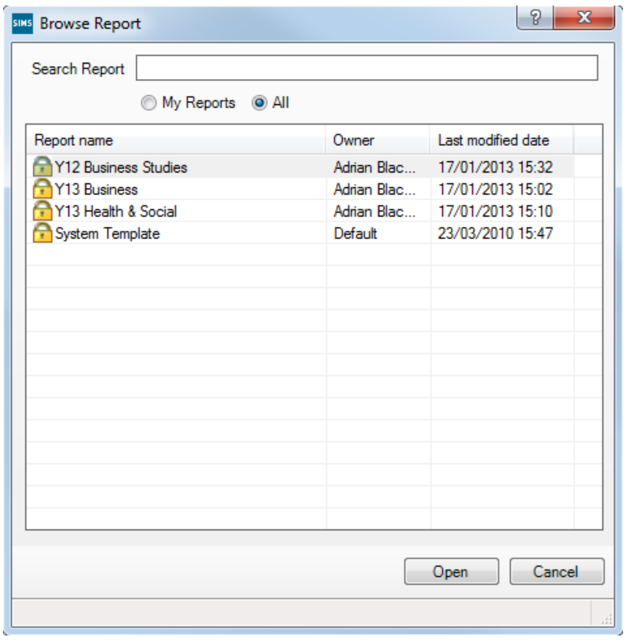
Viewing Student List Report Information

The **Student List Reports** panel displays details of the specified pupil/student from a selected Student List report (defined via **Reports | Student List | <Student List Report>**).



1. The report can be selected or changed by clicking the **Options** button at the top of the panel then selecting **Configure** from the drop-down menu to display the **Browse Report** dialog.

Options button



2. Search for and select the relevant report.
3. Click the **Open** button to return to the **Pupil** (or **Student**) **Teacher View** page. The information for the pupil/student is displayed immediately.

Printing the Pupil (or Student) Teacher View

The content of the **Pupil** (or **Student**) **Teacher View** can be printed by clicking the **Print** button at the top of the page.

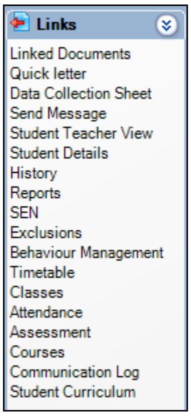
The **Pupil** (or **Student**) **Teacher View** is displayed in your web browser, from where it can be printed. The printed output is displayed in single column format. The **Basic Details** are printed as the first item on the output, followed by the **Timeline** (if you have elected to display it) then any of the additional widgets you have elected to display. The content of the additional widgets is printed in the order defined on the **Pupil** (or **Student**) **Teacher View Setup** page (via **Tools | Setups | Pupil** (or **Student**) **Teacher View**).

> *NOTE: It is not possible to print individually the content of a widget, with the exception of the* ***Timeline*** *widget (please see* Printing the Content of the Timeline Widget *on page* 134*).*

05| Using the Pupil/Student Links Panel

Introduction

The **Links** panel can be used to access other functional areas in SIMS which are directly related to the current page. For example, if you are viewing or editing pupil/student details, the **Links** panel provides shortcuts to the associated information such as Attendance, Assessment, Special Educational Needs (SEN) details, etc. This is particularly useful for example, when senior staff are preparing for a meeting with parents and wish to review key information relating to a particular pupil/student.



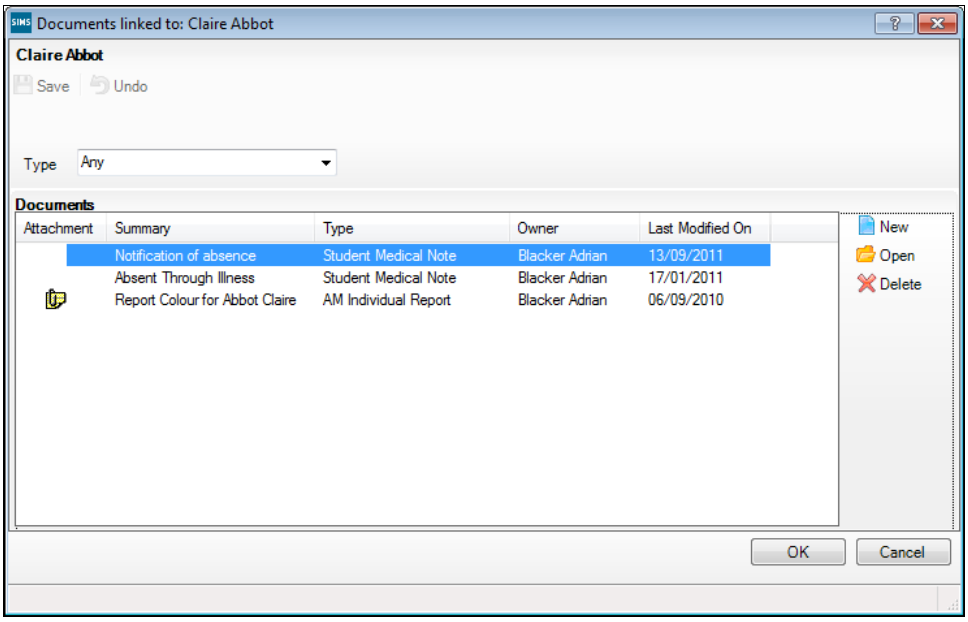
Links are accessed from the **Links** panel located on the right hand side of the page.

Click an option in the **Links** panel to select it. The preceding example is based on the **Links** panel accessed from the **Pupil** or **Student Details** page.

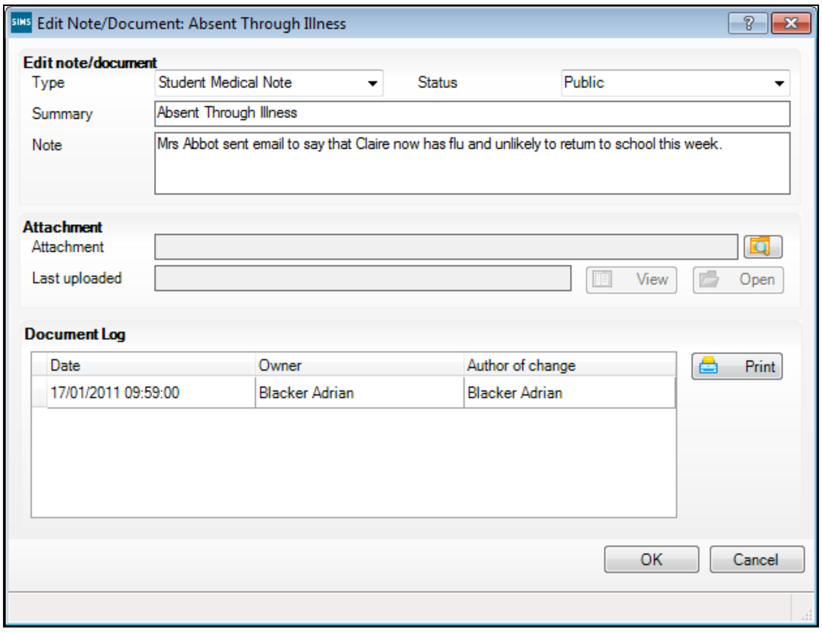
Maintaining Linked Notes/Documents

It is possible to attach documents in various areas of SIMS. Any documents that have been attached to the selected pupil/student's record can be viewed by selecting the **Linked Documents** option. This option can also be used to add additional documents.

Linked documents can include medical notes, SEN statements and SEN full descriptions, letters to parents, etc.



1. To filter the list to display only documents of a particular **Type**, select an option from the drop-down list. The options available are limited to the types of document currently linked to the pupil/student or applicant.
2. Highlight the required document then click the **Open** button to display its details in the **Edit Note/Document** dialog.

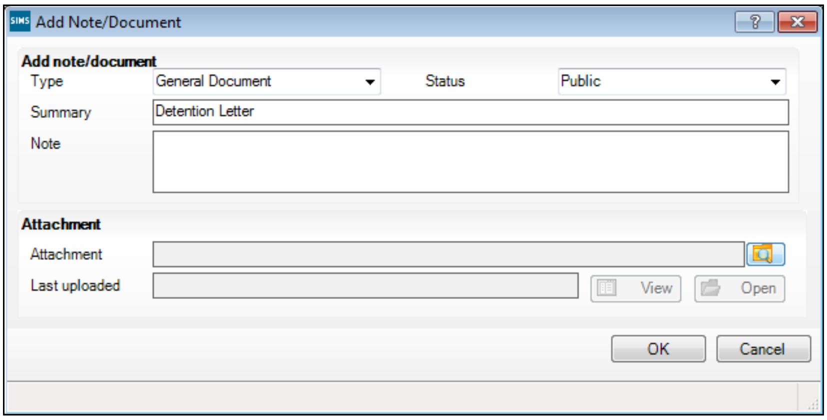


3. Any attachment can be viewed by clicking the **View** button, or edited, if required (and if you have applicable permissions), by clicking the **Open** button, making any changes to the document and clicking the **OK** button to save the changes.
4. The **Document Log** panel shows when it was uploaded to the DMS followed by any subsequent edits including the **Date** the changes were made, the original **Owner** and the name of the **Author of Change** who modified the document. This log can be printed if required by clicking the **Print** button.

Attaching a New Note/Document

There are various areas in SIMS where notes and documents can be attached to a record. The panel names may differ and the document **Type** required may differ, but the process of adding notes and documents is the same in each case. The following process describes how to add notes and documents from the **Add Note/Document** dialog.

1. Click the **New** button and select the appropriate type of document (if required) to display the **Add Note/Document** dialog.



2. Select the **Status** of the document from the drop-down list.
   - **Public** – the document will be available to all users with sufficient add/view/edit document permissions.
   - **Private** – the document will be available only to you.
   - **Confidential** – the document will be available only to SIMS users with School Administrator or Senior Management Team permissions.
3. If it is not already populated, enter a clear and concise **Summary** together with any further detail in the **Notes** field. This information can be useful for any reader of the attached and also if the document ever becomes detached from the pupil/student record. If you do not want to add an attachment, click the **OK** button at this point.
4. To add an **Attachment**, click the **Browse** button adjacent to the **Attachment** field and navigate to the location of a previously stored file.
5. Highlight the required document and click the **Open** button to attach it to the record.
6. Click the **OK** button to save the attachment.

   The **Last Uploaded** field remains empty until you have saved the record, then you are able to view the date and time of the last file upload, together with the name of the user who uploaded it.

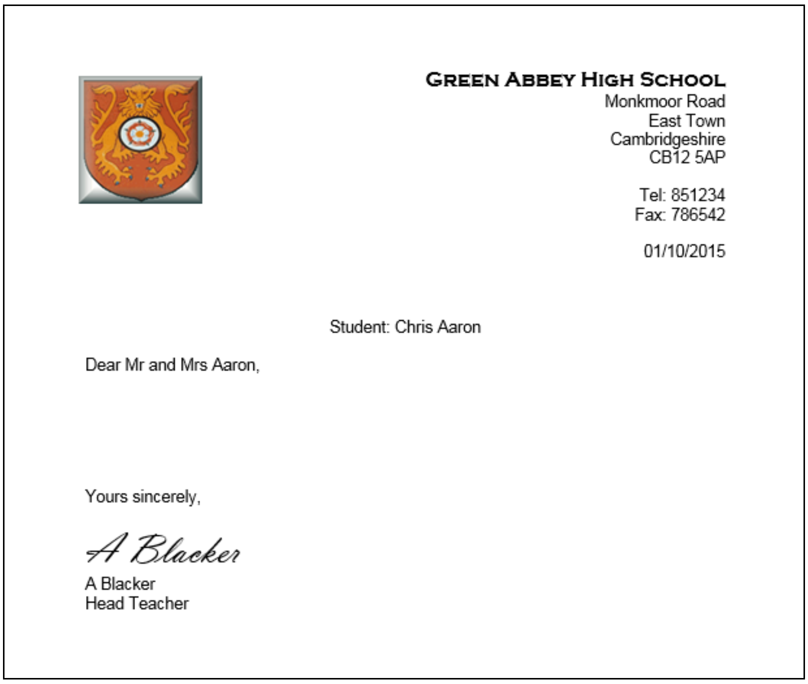
   It is possible to **View** or **Open** the attached document by clicking the respective buttons adjacent to the **Last Uploaded** field. The **View** button enables users with insufficient permissions to read the contents of the attachment. These users are not able to amend or edit attachments and the attachments are opened as read-only.

   The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When an attachment has been opened and amended and the **Save** button is clicked on the main page, an **Upload modified documents** dialog is displayed. Select the **Status** check box and click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.

   A **Document Log** at the bottom of the **Edit Note/Document** panel records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. This log can be printed for future reference by clicking the **Print** button.

Producing a Quick Letter

The **Quick Letter** option launches Microsoft® Word with a predefined letter template displayed complete with the relevant salutation and address information for the selected pupil/student's parents or contacts.



GREEN ABBEY HIGH SCHOOL
Monkmoor Road
East Town
Cambridgeshire
CB12 5AP

Tel: 851234
Fax: 786542

01/10/2015

Student: Chris Aaron

Dear Mr and Mrs Aaron,

Yours sincerely,

A Blacker

A Blacker
Head Teacher

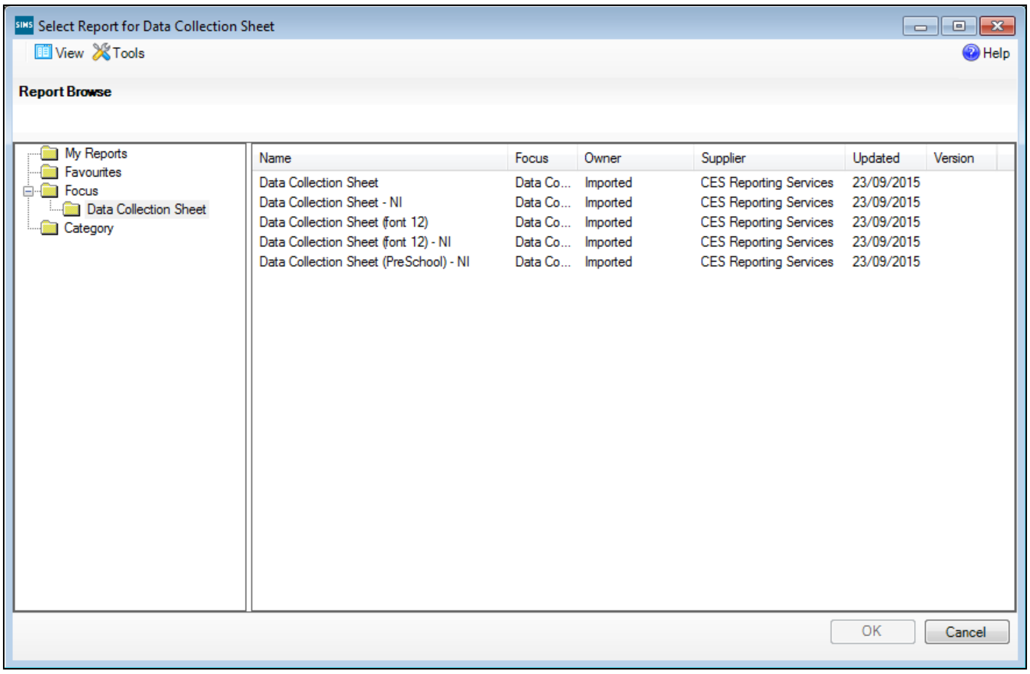
Enter the required text in the body of the letter before printing and/or saving.

Additional Resources:

General SIMS Setups chapter of the *Setting up and Administering SIMS* handbook

Creating Data Collection Sheets

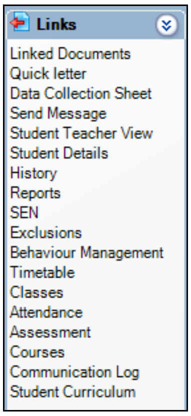
The **Data Collection Sheet** option displays the **Select Report for Data Collection Sheet** dialog enabling you to select the required data collection sheet report.



Navigate to the required report then click the **OK** button to produce the data collection sheet.

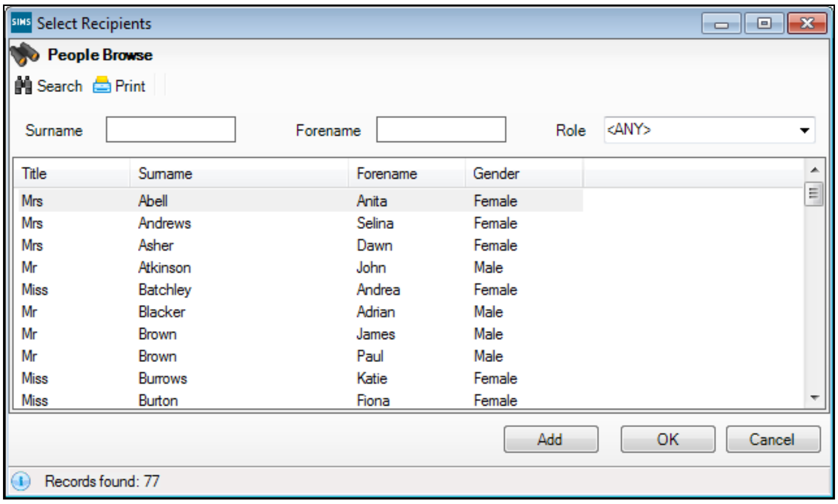
Sending Pupil/Student Related Messages

The **Send Message** option on the pupil/student **Links** panel is used to send a message about the selected pupil/student to one or more recipients.



The relevant pupil/student's **Name**, **Gender**, **Year Group** and **Class**/**Reg Group** will be entered automatically. These cannot be amended.

1. From the **Recipient** panel, click the **Add** button to display the **Select Recipients** dialog.

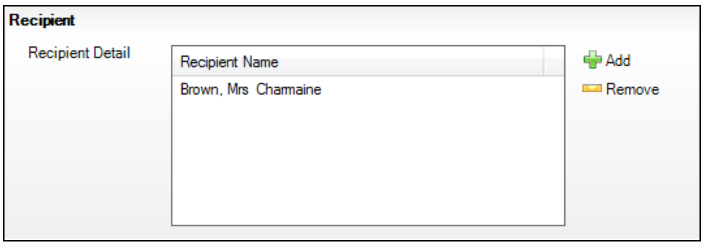


2. Enter or select any necessary search criteria then click the **Search** button.

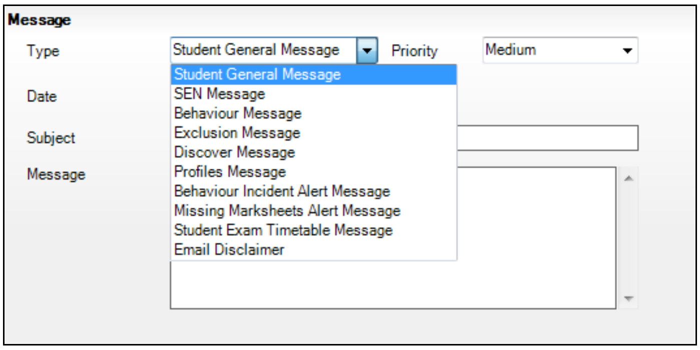
> *NOTE: To filter the list to display only those who are teaching the selected pupil/student today, select **Class Teacher** from the **Role** drop-down list.*

3. To select a single person, highlight their name and click the **OK** button. To select multiple people, you can:
   - click the first person's name and click the **Add** button. Repeat this process for each person you wish to add, then click the **OK** button.
   - select a block of people by clicking the first name in a block, holding down the **Shift** key then clicking the last name in the block, then click the **OK** button.
   - hold down the **Ctrl** key and click each person's name, then click the **OK** button.

   The selected name(s) are displayed in the **Recipient Detail** list on the **Send Message** dialog.



4. The message **Type** defaults to **Student General Message**, but can be changed by selecting from the drop-down list of the **Message** panel. This is displayed in the **Read Message** dialog when opened by the recipient.

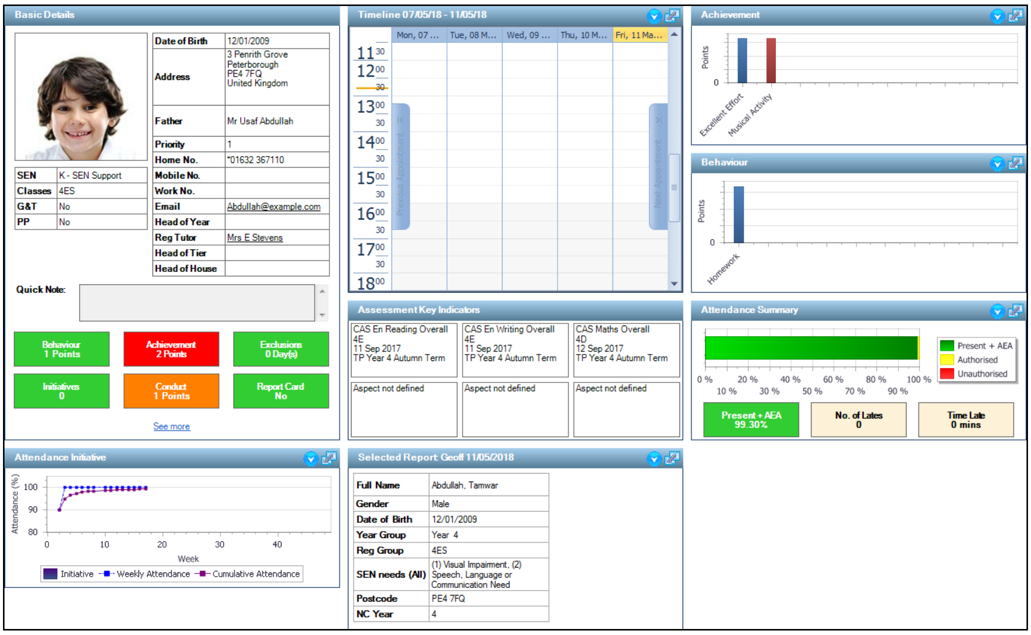


5. The **Priority** field defaults to **Medium** but can be changed to **Low** or **High**, if required, by selecting a value from the drop-down list.
6. The **Date** defaults to the current date and time and cannot be altered.
7. The **Subject** of the message defaults to: <Pupil/student Name> | <Gender> | <Year Group> | <Class/Reg Group>. This can be edited if required.
8. Enter the main **Message** text.
9. Click the **Send** button to send the message to the selected recipients. The recipients will see this message in the **My Messages** panel of their **Home Page** the next time they log into SIMS, or the next time SIMS refreshes their **My Messages** panel.

More Information:
Setting Panel Refresh Rates on page *71*

Accessing the Student Teacher View

Clicking the **Pupil** (or **Student**) **Teacher View** button displays the **Pupil** (or **Student**) **Teacher View** for the selected pupil/student. This view has been designed to enable class teachers to quickly view a summary of information relating to any pupil/students in their registration group or class.



Viewing Pupil/Student History

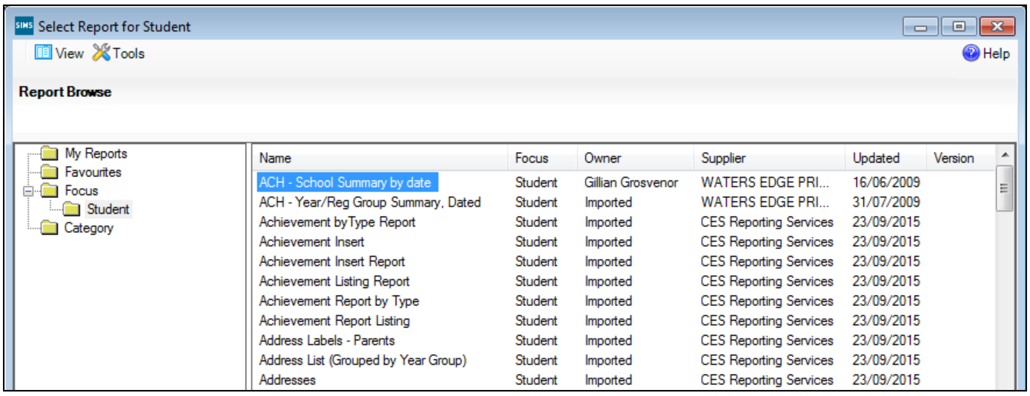
This option, accessed via the **History** link, displays the pupil/student page with an **Effective Date** field enabling you to specify the date on which you wish the viewed data to be based. If, for example, you want to see a child's record for the last academic year, simply change the date accordingly. This is particularly useful for viewing previous year groups, registration groups, houses, etc. You can also access this option via **Focus | Pupil** (or **Student**) **| Education History** and selecting the required pupil/student.

More Information:

Editing Historical Pupil/Student Information on page *259*

Running Reports

Clicking the **Reports** hyperlink displays the **Report** browser, enabling you to select the report you wish to produce.



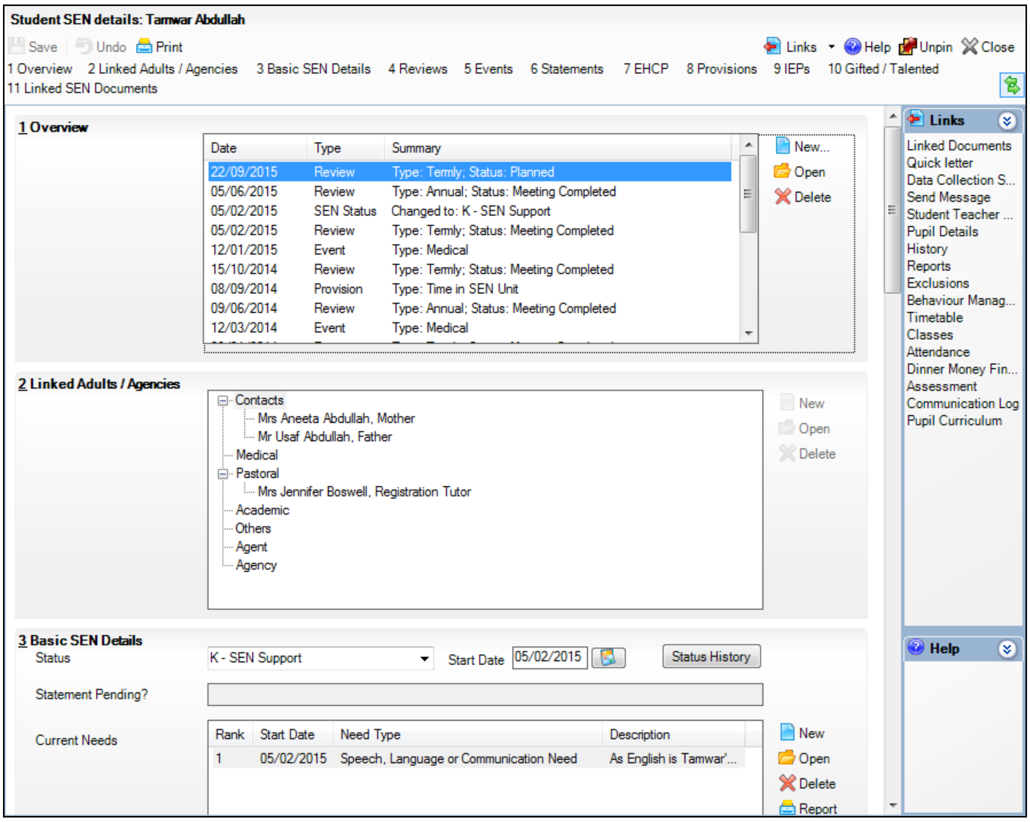
Navigate to and highlight the required report, then click the **OK** button to run it.

Additional Resources:

Designing and Running Reports handbook

Viewing SEN Information

Clicking the **SEN** option displays the **SEN Student** details page containing any SEN information (if applicable).

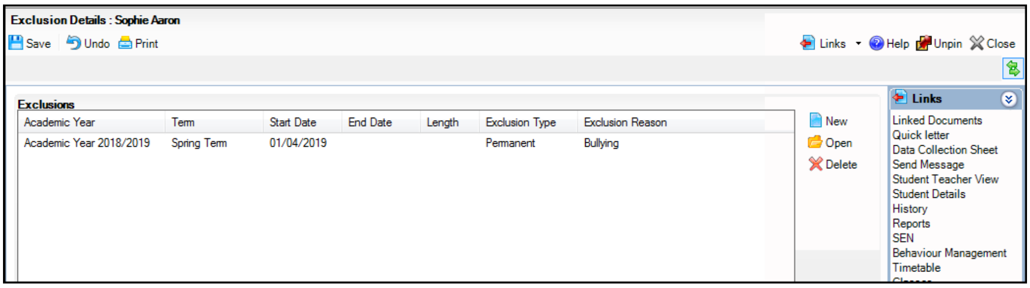


Additional Resources:

Special Educational Needs handbook

Viewing Exclusions Information

The **Exclusions** option displays the **Exclusions Details** page listing any exclusions that may have been applied.



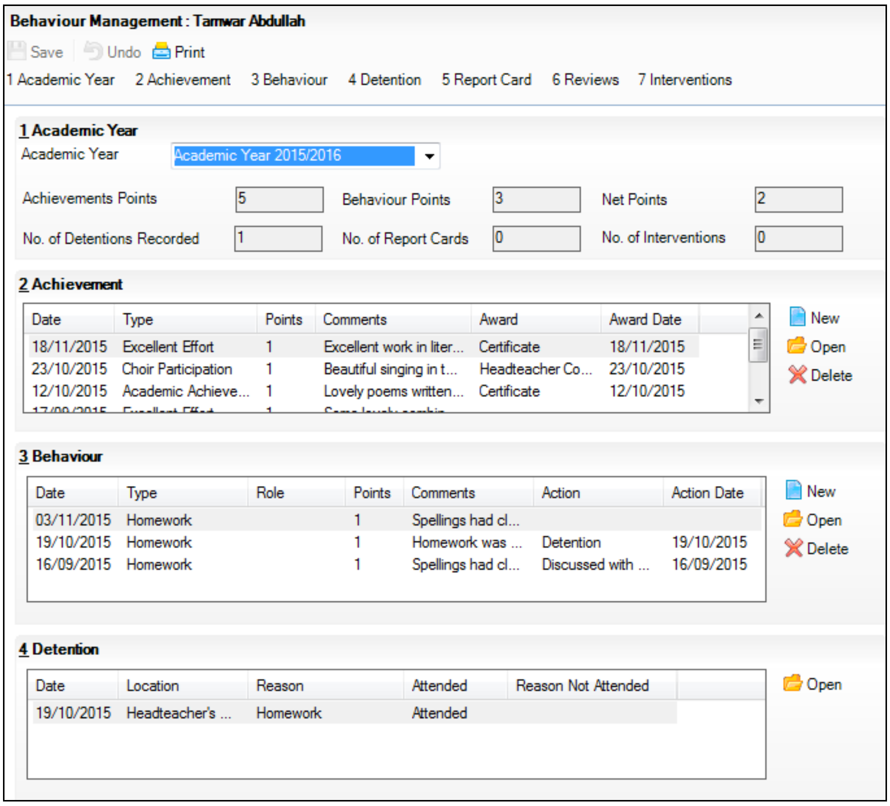
Information can be added or edited if you have appropriate Permissions.

More Information:

Recording an Exclusion on page *441*

Viewing Behaviour Information

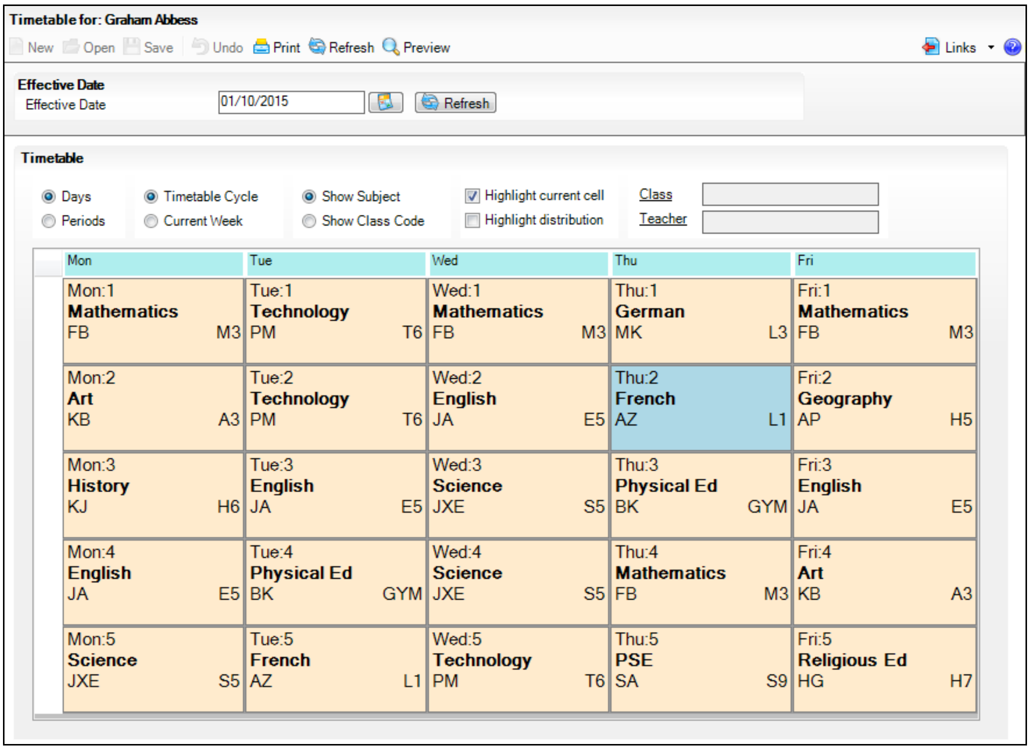
The **Behaviour Management** option displays the **Behaviour Management** page showing any achievements, behaviour incidents, detentions and report cards.



More Information:
Recording Behaviour Incidents on page *355*

Viewing Timetable Information

The **Timetable** option is available to Secondary schools using Nova-T and displays the timetable for the selected pupil/student.

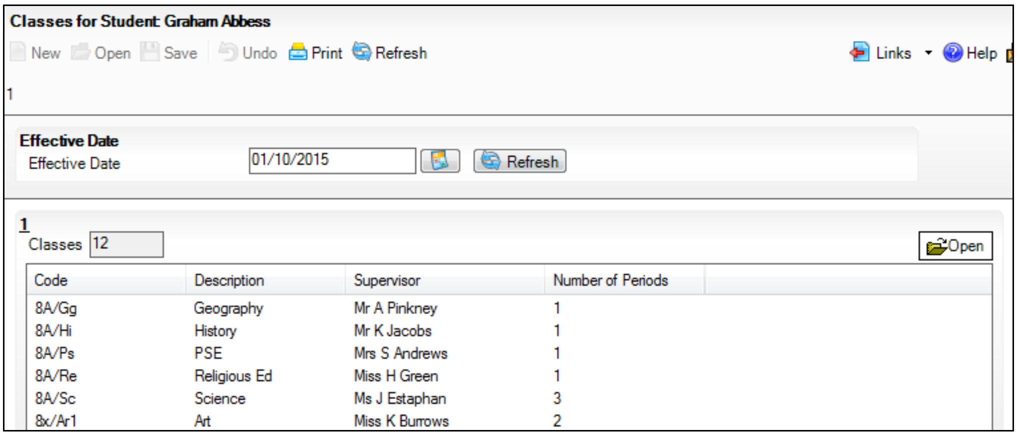


Changing the **Effective Date** allows a previous or future (if available) timetable to be viewed.

A number of different options are available to change the way that the information is displayed: Day/Period, Timetable Cycle/Current Week, Show Subject/Show Class Code and Highlight Current Cell/Highlight Distribution. Select the applicable check boxes/radio buttons as required.

Viewing Registration Group/Class Information

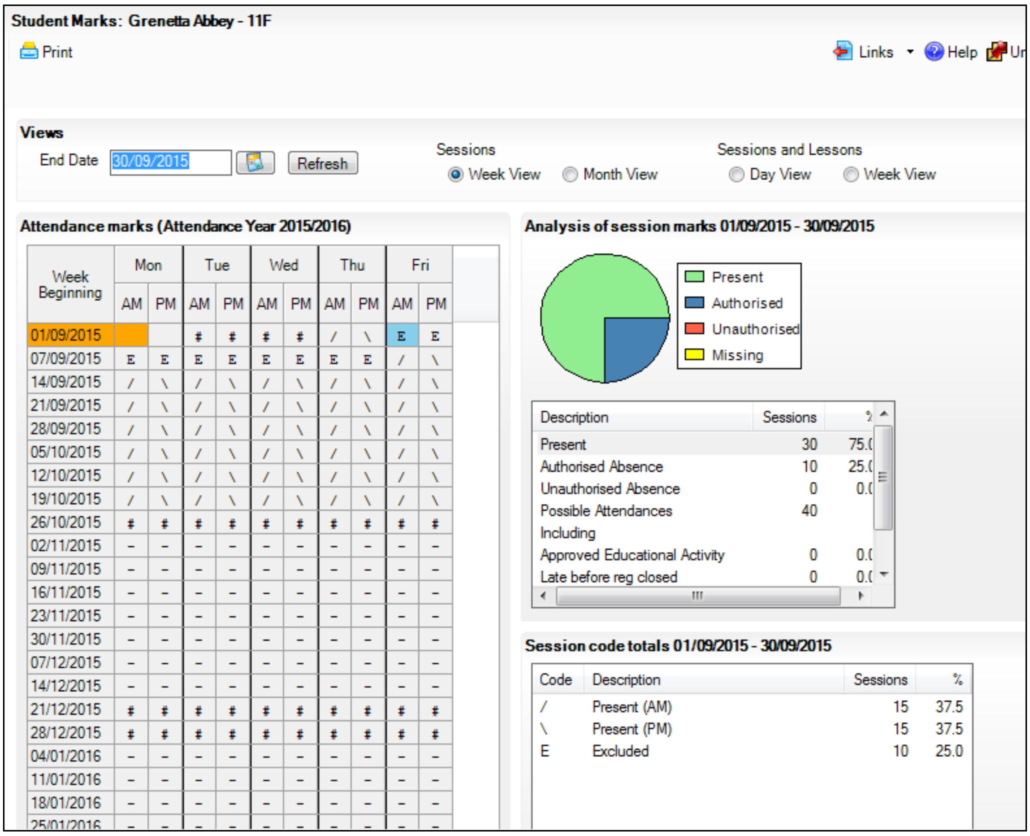
Selecting the **Classes** option displays the **Classes for Students** page, showing the classes that the selected pupil/student attends, together with the supervisor for each class.



Double-clicking any class opens the **Class** page listing all the pupil/students within that class.

Viewing Attendance Information

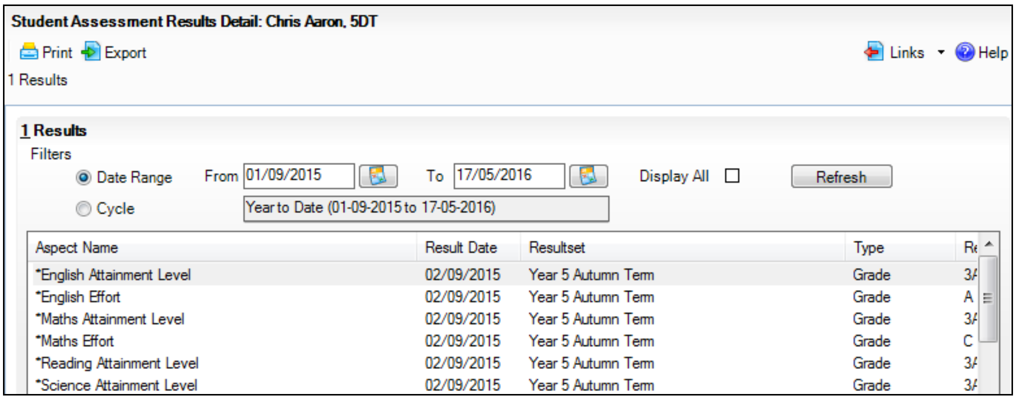
Selecting the **Attendance** option displays the **Attendance** page for the selected pupil/student.



The page displays the attendance marks (if the SIMS Attendance module is in use) for the current academic year.

Viewing Assessment Information

If Assessment Manager is in use, selecting the **Assessment** option displays the **Student Assessment Results Detail** page.

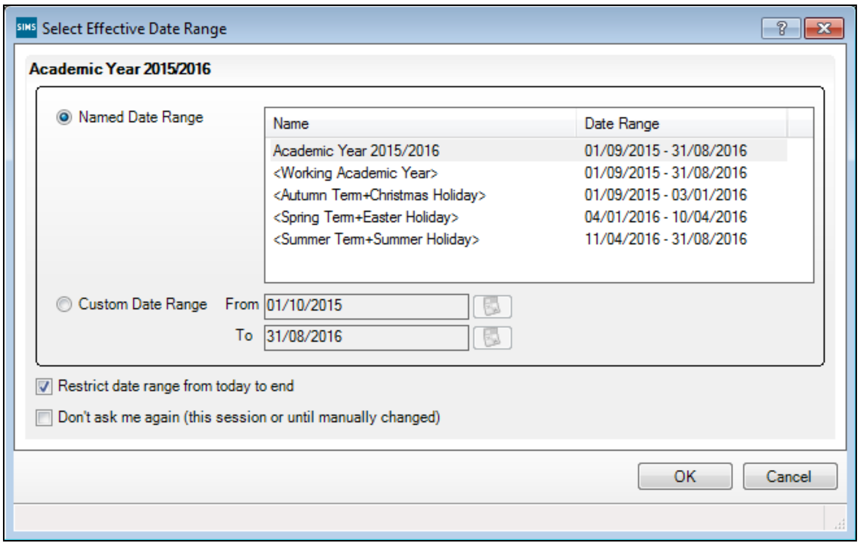


Select the required date range from the **Filters** section and click the **Refresh** button. This will display all assessment results within the selected timeframe.

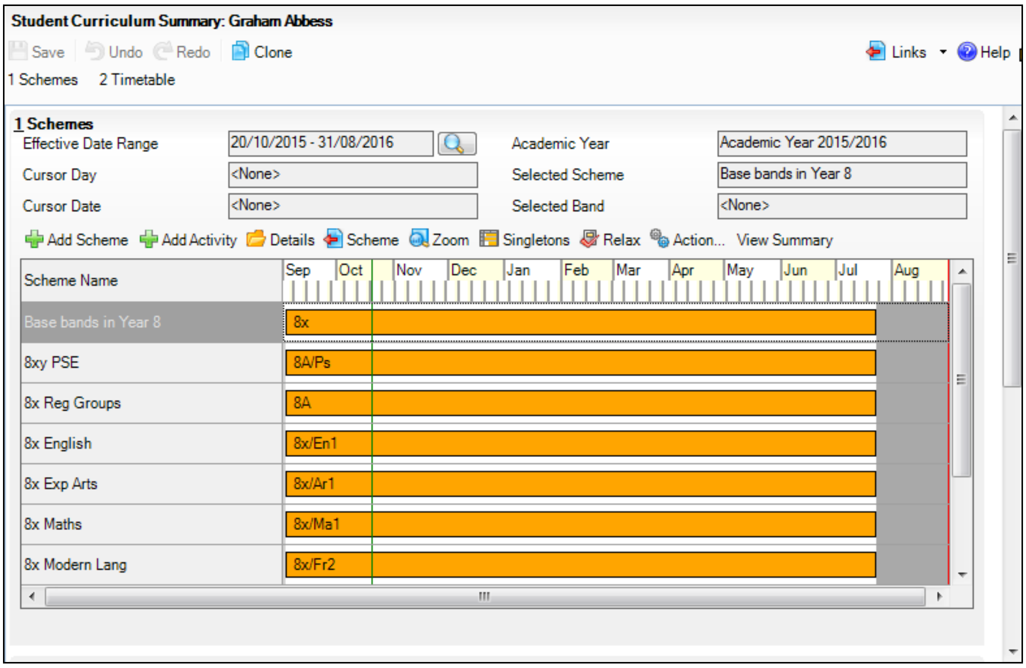
Click the **Export** button to export the data to Microsoft Excel.

Viewing Curriculum Information

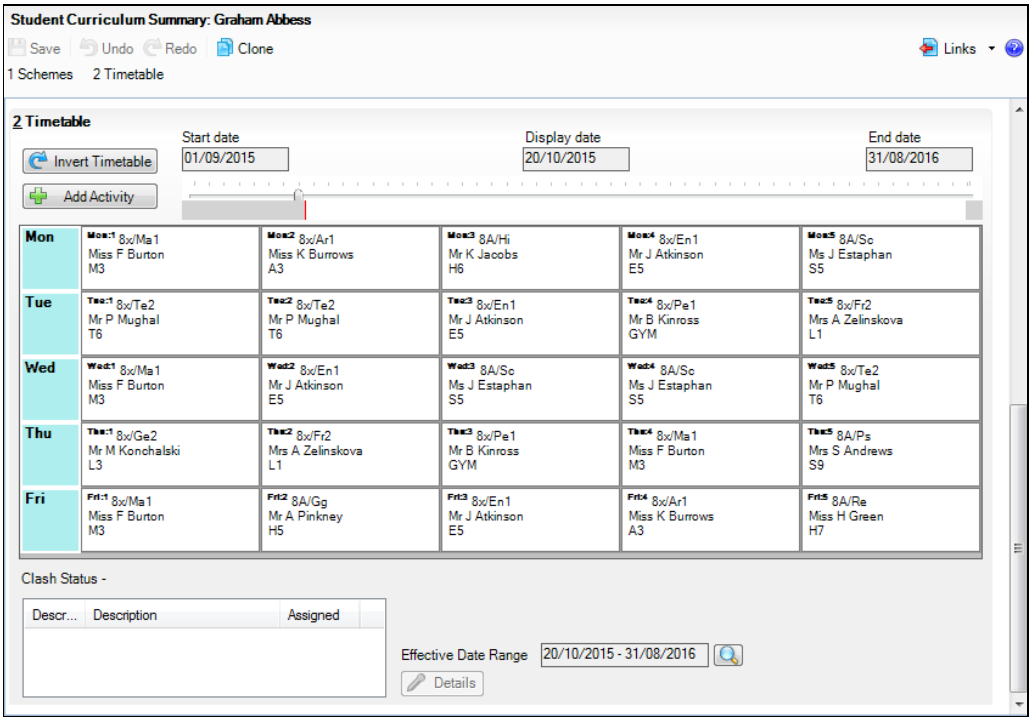
If Nova-T and Academic Management are in use, selecting the **Student Curriculum** option displays the **Select Effective Date Range** dialog.



Select the required date range or create a **Custom Date Range** by selecting the adjacent radio button and entering the custom dates. Click the **OK** button to display the **Student Curriculum Summary** page.



A **Timetable** panel is also available, listing the timetable for the selected student together with any clashes.

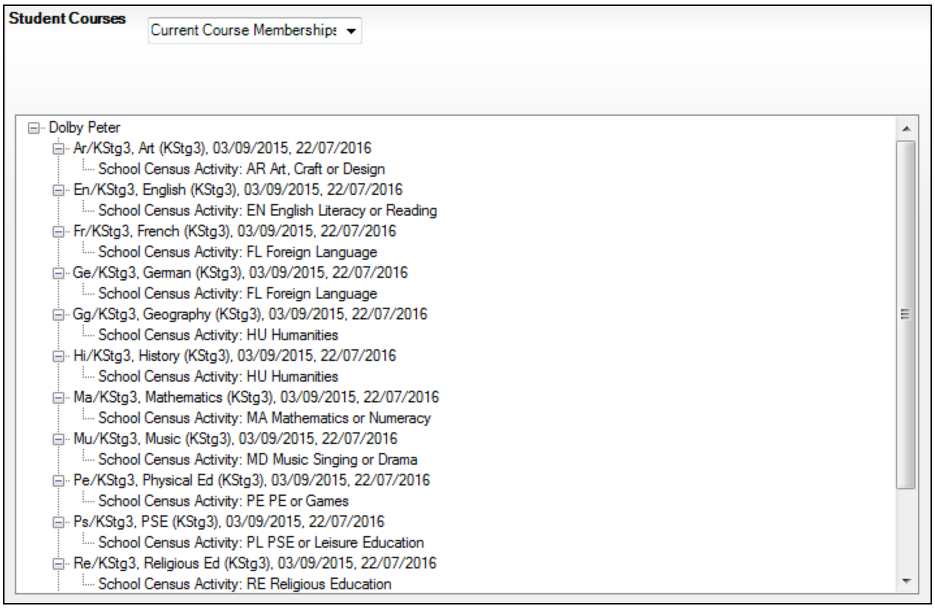


Additional Resources:

Academic Management in SIMS handbook

Viewing Courses

To view the courses for which the selected pupil/student is a member, click the **Courses** hyperlink in the **Links** section.



The **Current Academic Year** courses are displayed by default, but this can be amended to a different time period by selecting a different option from the drop-down list.

The tree structure opens in expanded view, and displays all courses for which the selected pupil/student is a member. The first node displays the selected pupil/student's name. The second node displays the short name of the course, the course description and its start and end date. The third node displays all of the classifications for the course, the codeset description, its code and code description.

The information on the **Student Courses** page can be printed by clicking the **Report** button, which displays a report in your default Internet browser. You can then right-click and select **Print** from the pop-up menu.

Viewing Examination Results in SIMS

Once examination results have been imported, this information can be viewed in Examinations Organiser and SIMS, together with any outstanding examination entries and forecasts and coursework marks.

Click the **Examinations** hyperlink in the **Links** panel on the right-hand side of the page to display the **Student Examination Results Detail** page.

1 Results, Endorsements and Equivalents

Date	Level	Board	Code	Title	Status	Result	Points	Endrs	Equiv	Ext	Fcst
2015-02	GCE/ASB	WJEC	212101	Drama and Thea AS Cash-in	Cert	D	90.00				
2015-02	GCE/ASB	WJEC	217101	English Litera AS Cash-in	Cert	D	90.00				
2015-02	GCE/ASB	WJEC	220101	Geography AS Cash-in	Cert	D	90.00				
2015-02	GCE/ASB	WJEC	260101	Applied Busine AS Cash-in (Single)	Cert	D	90.00				
2014-06	CNAT/...	OCR	J804	Business	Cert	M2	0.00				M2
2014-06	GCSE/FC	AQA	4365F	Mathematics (Linear) Tier F	Cert	D	34.00				D
2014-06	GCSE/FC	AQA	8705F...	English Lang Tier F (Written)	Cert	C	40.00				C
2014-06	GCSE/FC	AQA	8710F...	English Lit Tier F (Written)	Cert	C	40.00				C
2014-06	GCSE/FC	OCR	J241	Science A	Cert	C	40.00				B
2014-06	GCSE/FC	OCR	J303	Design & Tech: Graphics	Cert	D	34.00				D
2014-06	GCSE/FC	OCR	J382	Geography A	Cert	D	34.00				D
2014-06	GCSE/FC	OCR	J730	French	Cert	D	34.00				D

2 Entries and Forecasts

Season	Level	Board	Code	Title	Status	Mode	Fcst

3 Coursework Marks

Season	Board	Code	Title	Element	Level	Result	Status

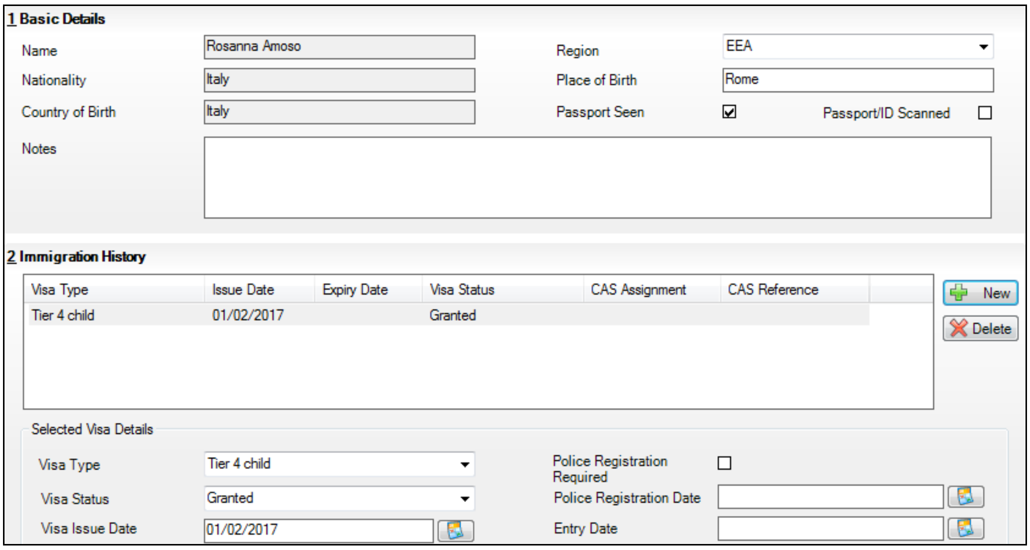
Any examination **Results, Endorsements and Equivalents** are displayed, together with details of any outstanding **Entries and Forecasts**, as well as any **Coursework Marks**.

Click the **Export** button to export the data to Microsoft Excel.

Viewing Tier 4 Information

Applicable to Independent schools only

Click the **Tier 4 Details** link to view a pupil/student's Tier 4 information. **Immigration History** (including Visa and Confirmation of Acceptance for Studies (CAS) details) and **Home Office Reporting** details are displayed and maintained here.



More Information:
Recording Tier 4 Application Information on page *279*
Recording Tier 4 Information on page *223*

Recording Leavers

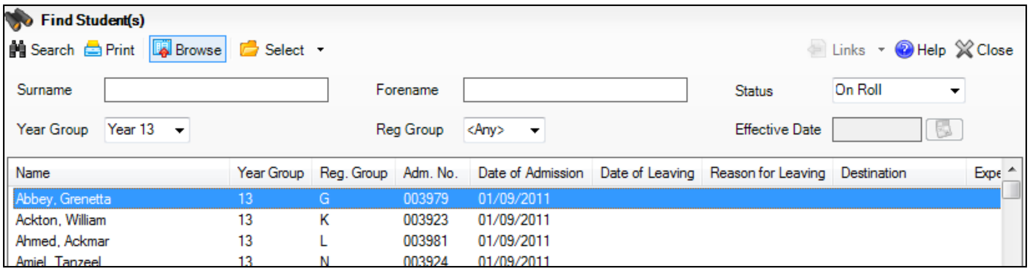
If a pupil/student leaves your school for any reason, you can mark them as a leaver which removes them from your school, but enables historical records to be kept. During the Summer term, for example, you need to mark most or all pupil/students in your top year as leavers so that they are no longer on-roll at the start of the new academic year. The date of leaving and leaving destination, together with the reason for leaving can be recorded.

IMPORTANT NOTES: *To ensure that historical data is accurately maintained, it is essential that you do not record leavers by removing their date of admission.*

If a pupil/student who was a leaver subsequently returns, please ensure that you re-admit them – do not remove the date of leaving (please see Re-admitting Pupil/Students *on page* 302*).*

To ensure that information required for statutory returns (e.g. the School Census) is accurate and up-to-date, check that the leavers have been given an SEN Status other than ***Not Assigned*** *and that an* ***Ethnicity*** *has been recorded before making the pupil/student a leaver.*

1. Select **Routines** | **Pupil** (or **Student**) | **Leavers** to display the **Find Student(s)** browser.



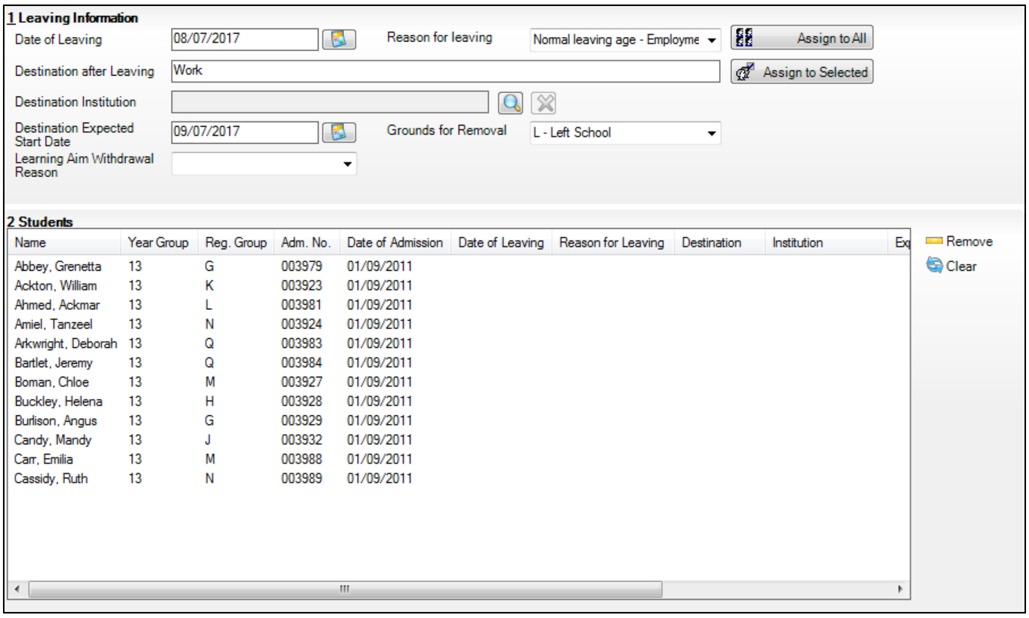
2. Search for the required **Year** or **Reg Group** (or **Class**) by selecting from the appropriate drop-down lists and then click the **Search** button.

   To select all the pupil/students displayed in the browser, click the **Select** button down arrow and select **All** from the drop-down menu.

   To select a group of pupil/students, highlight them using any of the following methods:

   - Hold down the **Ctrl** key and single-click each required pupil/student.
   - To highlight sequentially listed children, single-click the first pupil in the list, hold down the **Shift** key then click the last required pupil in the list.

3. Once the required pupil/students have been highlighted, click the **Select** button. The selected pupil/students are then transferred to the **Students** panel.



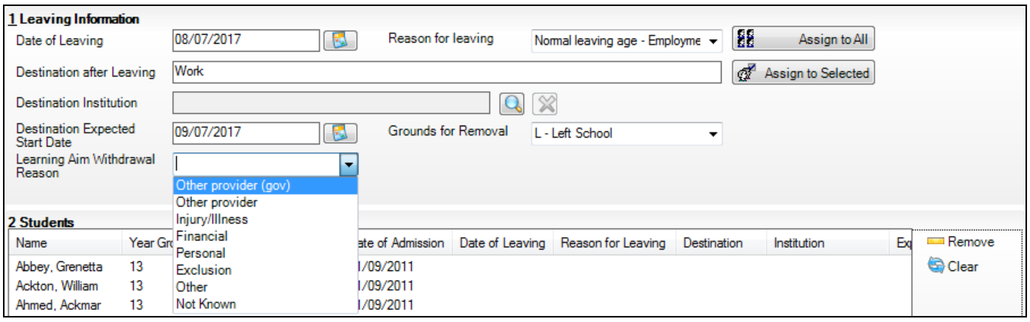
4. Enter the **Date of Leaving** or click the **Calendar** button and select the required date.

 *Calendar button*

This date of leaving should be the date that the pupil/student is actually leaving the school if they are not for transferring from Junior/Primary to Secondary phase. Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not have any gaps between dates and may suggest a date of leaving (the old school) of 4th September and the date of admission (into the new school) of 5th September. If you are in any doubt, please contact your Local Authority for advice.

> ***IMPORTANT NOTE:*** *It is recommended that pupil/students leaving at the end of Year 11 who may return to Year 12, are not given a date of leaving until it has been confirmed that they will be leaving the school at the end of the Summer term as this may cause issues with Attendance information.*

5. Select the **Reason for Leaving** from the drop-down list, such as **Normal leaving age - Employment**.
6. Enter the **Destination after Leaving** if required. Alternatively, you can apply the **Reason for Leaving** to one set of pupil/students (as described in the previous step), then select the **Destination after Leaving** for a different, or subset of pupil/students.
7. Enter the **Destination Expected Start Date** or select the required date from the Calendar.
8. For schools in England, if the pupil/student is a child deemed missing in education, select the **Grounds for Removal** from the drop-down list.
9. Secondary schools in England can select a **Learning Aim Withdrawal Reason** from the drop-down list. Secondary schools in Wales can select an **LA Withdrawal Reason** (Learning Activity). When recording a **Learning Aim Withdrawal Reason** for Post 16 students, this information is used by Course Manager.



10. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys (as described in step 2) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
11. If an error has been made, highlight the particular pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
12. To remove a pupil/student from the list, highlight their name and then click the **Remove** button.

13. To clear the contents of the fields in the **Leaving Information** panel, highlight the required pupil/student(s) then click the **Clear** button. Re-enter the information as required.
14. Click the **Save** button to save the changes. The chosen pupil/student(s) are recorded with a date of leaving on the date specified.

Selecting a Destination Institution

1. To narrow your search, enter all or part of the required institution name in the **Name** field and click the **Search** button. Leaving the **Name** field blank will list all institutions.
2. Highlight the relevant institution and click the **OK** button to return to the **School History** panel.
3. Select the **Destination Expected Start Date** by clicking the **Calendar** button and selecting the required date.

06| Maintaining Pupil/Student Information

Introduction

There are several ways in which a new pupil/student can be added to SIMS:

- Manual entry via keyboard.
- Importing via CTF (although some details will usually have been entered into SIMS before the CTF is imported).
- Importing via ADT and/or ATF (Admissions Code of Practice for England).
- Via the admissions process (adding as a pre-admission child then offering, accepting and admitting).

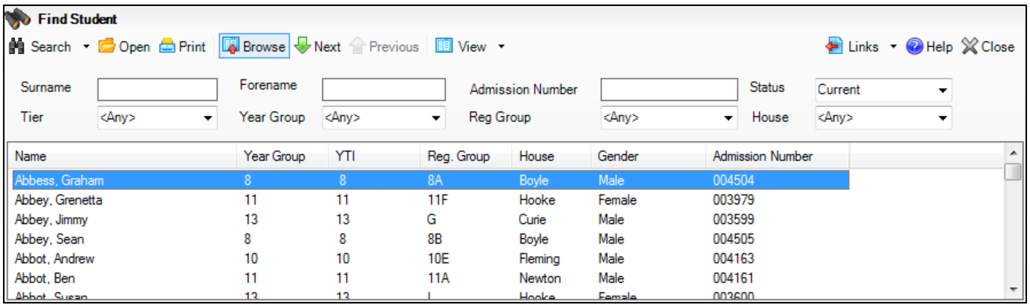
This chapter describes how to manually enter a pupil/student into SIMS or edit existing details.

> *NOTE: The processes available to you, together with the data that can be viewed/edited depend on your permissions and are outlined in the applicable section.*

Searching for an Existing Pupil/Student

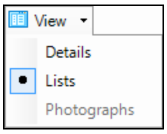
Any pupil/students already entered into SIMS can be found using the **Find Student** browser.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.



2. Enter either all or part of the pupil/student **Surname** and/or **Forename**, or enter their **Admission Number**.
3. Select applicable values from the various drop-down lists to further restrict the list of pupil/students returned.

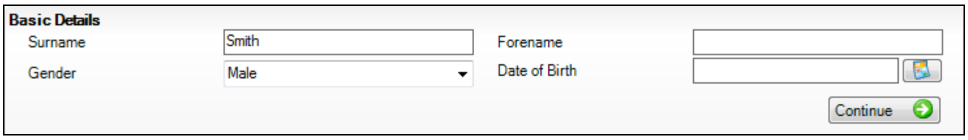
   By default, pupil/students with the status of **Current** are listed, but it is possible to select **Leavers**, or **Guest Pupil/Students** from the **Status** drop-down list. Leavers are pupil/students who have been given a date of leaving that falls on or before the current date and after the last date of arrival.



   If you prefer to search for **Lists** of pupil/students or would like to view pupil/students who have a **Photograph** attached to their details, select either of these options from the **View** drop-down list. The default search option is set to display **Details**.
4. Click the **Search** button to list all pupil/students who match the search criteria specified.

Recording a New Pupil/Student

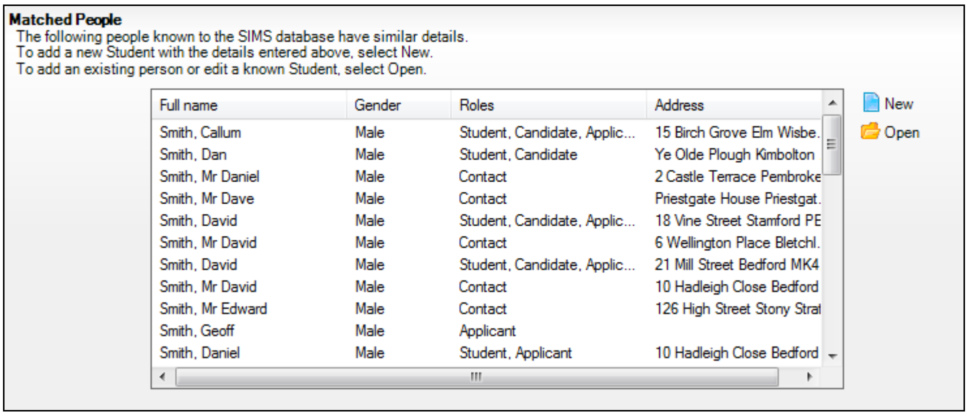
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. Click the **New** button to display the **Basic Details** panel.



3. Enter any combination of the **Surname** (as a minimum), **Forename** and **Date of Birth** and/or select the **Gender** from the drop-down list and then click the **Continue** button. If no existing pupil/students match, the remainder of the **Pupil (or Student) Details** page is displayed (populated with the details just entered).

> *NOTE: It is important to ensure that surnames and forenames are spelt correctly at this point to avoid duplicate records being corrected. If you are unsure, enter partial surnames/forenames as required.*

To check that the pupil/student does not already exist, any people closely matching the entered details are displayed in the **Matched People** panel.



> *NOTE: The **Matched People** panel displays a list of all **people** in the system which include staff, contacts, agents, etc. If you think the pupil/student already exists, check that the **Role** is **Student**. The order of the display can be changed by clicking the required column heading.*

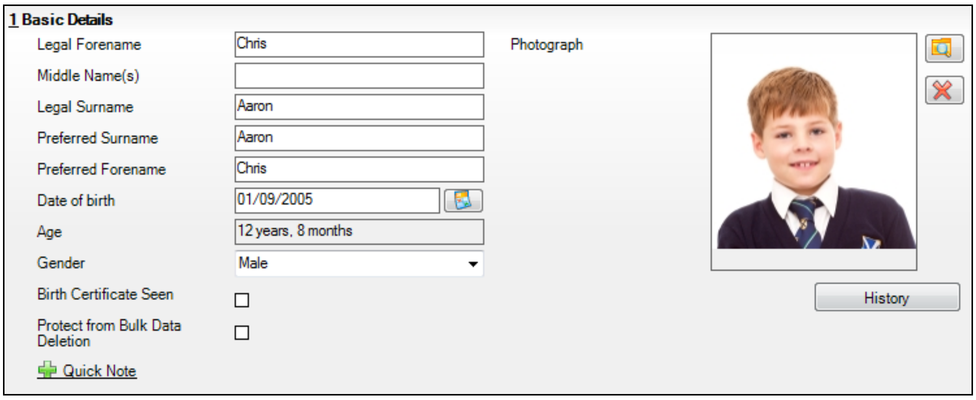
- If the required pupil/student does not appear in the list, click the **New** button adjacent to the **Matched People** panel. The **Pupil (or Student) Details** page is displayed populated with the data just entered.
- If the required pupil/student appears in the list, you can edit their details by highlighting their name and clicking the **Open** button.

Once a new record has been created, the **Basic Details** panel is displayed with the information added during the previous step.

Adding/Editing Basic Details

Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

1. Click the **Basic Details** hyperlink to display the **Basic Details** panel.



2. Complete any remaining name fields (**Legal Forename** down to **Preferred Forename**), noting that the **Legal Forename** and **Legal Surname** fields are mandatory.

> *NOTE: The **Pupil Former Name** should only be completed if a former name is already known to the school. If the pupil/student has more than one former surname, record the most recently used.*

3. Enter the **Date of Birth** if not already completed (this field is mandatory) or click the **Calendar** button and select the required date. The **Age** is automatically calculated based on the date of birth when the record is saved.

 *Calendar button*

4. Select the **Gender** from the drop-down list.
5. Select the **Birth Certificate Seen** check box if applicable.
6. To prevent the selected pupil/student's data from being deleted by the Bulk Delete Pupil (or Student) Data process, select the **Protect from Bulk Data Deletion** check box.

Recording a Quick Note

There may be occasions when you wish to add an important note that appears in the **Basic Details** panel. This ensures that any user (that has applicable permissions) accessing the pupil/student record, sees the important note.

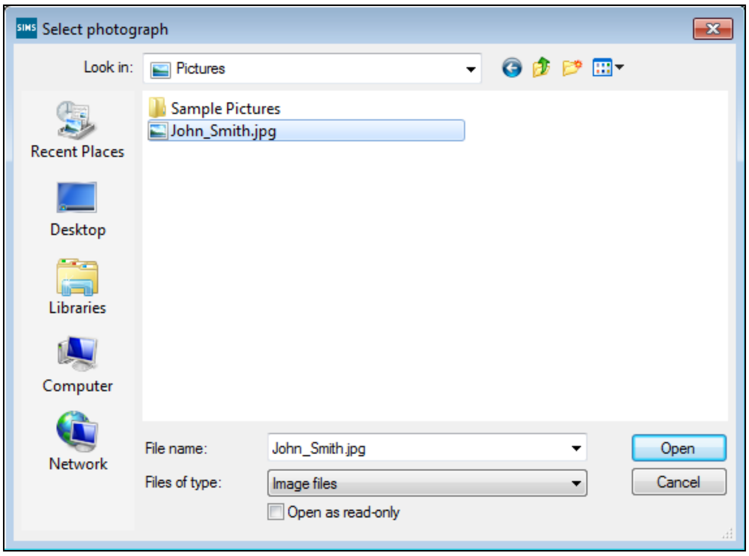
1. Click the **Quick Note** hyperlink at the bottom of the **Basic Details** panel.
2. The Quick Note pane is expanded. Add the required text which appears in bold and will remain visible until closed. If you want the note to be closed, click the **Quick Note** hyperlink again.

Attaching a Photograph

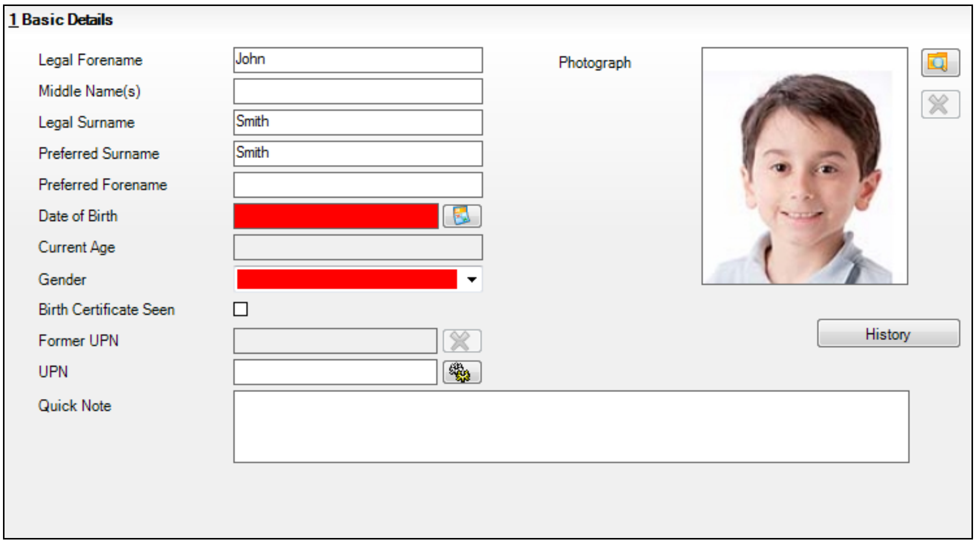
1. If you have an electronic copy of a pupil/student photo, this can be attached to the record by clicking the **File Browser** button to the right of the **Photograph** panel.

File Browser button

The **Select Photograph** dialog is displayed.



2. Navigate to, and then select the required photograph, then click the **Open** button. The selected photo appears in the **Basic Details** panel.



Recording a Legal Change to a Pupil/Student's Current Name

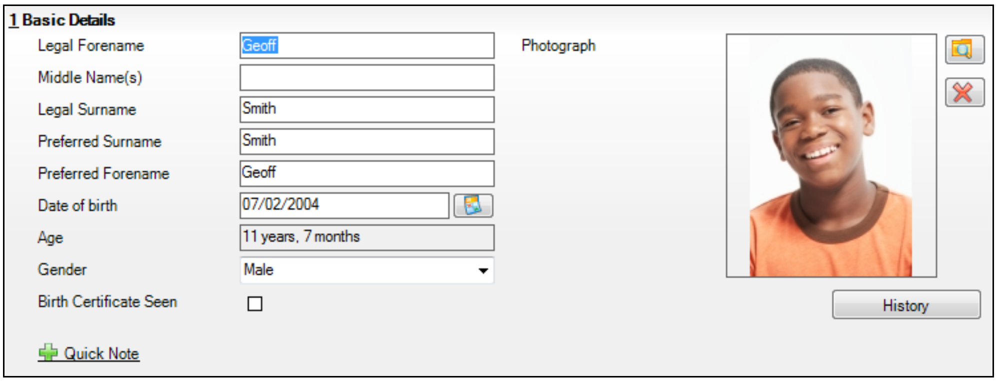
It is a requirement of the English School Census and Welsh PLASC returns that a history of pupil/students' previous **Legal Names** is maintained. This information is also transferred via the Common Transfer File (CTF).

It is possible to make changes to a pupil/student's or an applicant's name details. The changes may affect their current name details or details that were previously valid.

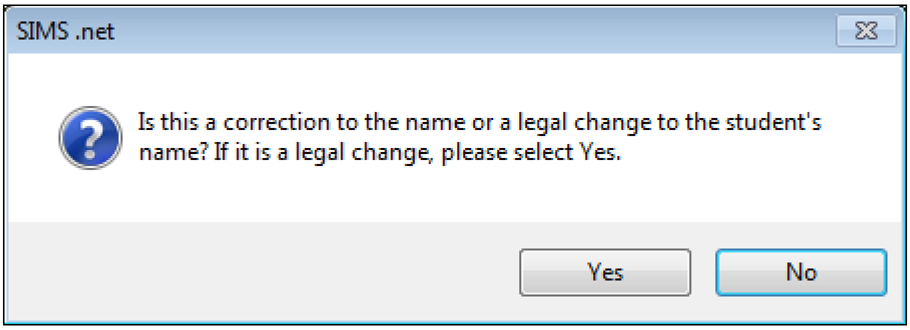
It may be necessary to make changes for a number of reasons including the correction of inaccurately entered information, legal adoption, change of legal surname, etc. If the name change is because a correction is required, please refer to the next section.

When a pupil/student's **Legal Surname** or **Forename** is changed, it is essential that the date that the change was either requested by the parents or actually became legal, is recorded.

1. In the **Basic Details** panel, review the incorrect name details and then make the necessary changes.

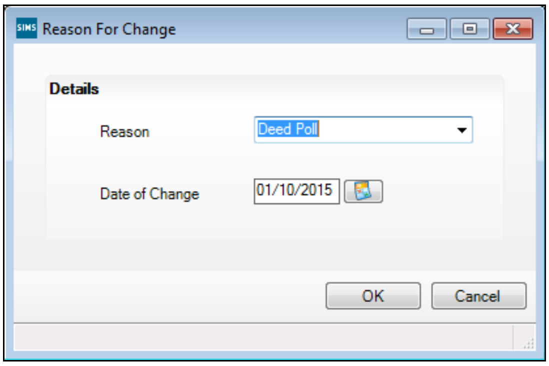


2. Click the **Save** button on the main **Pupil (or Student) Details** page to save the details. The following message is displayed.



If the name change is a correction, click the **No** button. This will complete the name change.

If the **Yes** button is clicked, the **Reason for Change** dialog is displayed.



3. The **Reason** field does not have to be completed but should be selected to maintain a complete history of the name change. The **Date of Change** defaults to today's date but this can be amended by clicking the **Calendar** button and selecting an alternative date.
4. Click the **OK** button to close the dialog and save the changes. The pupil/student's name is now displayed correctly.

Correcting a Pupil/Student's Current Name

If the pupil/student's name was originally entered incorrectly, it is possible to correct the relevant details.

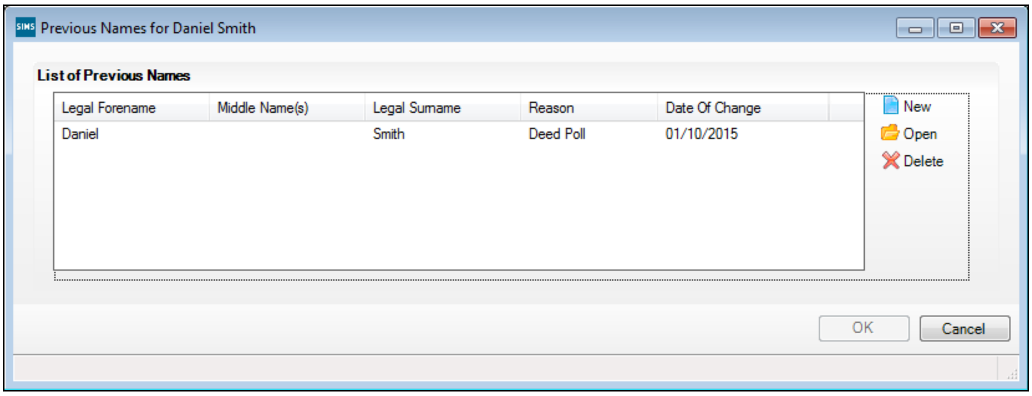
1. In the **Basic Details** panel, review the incorrect name details and then make the necessary corrections.
2. Click the **Save** button on the main **Pupil (or Student) Details** page to save the details.

   SIMS displays a message dialog asking '**Is this a name change or a correction?**'
3. Click the **Correction** button to close the message dialog and save the correction.

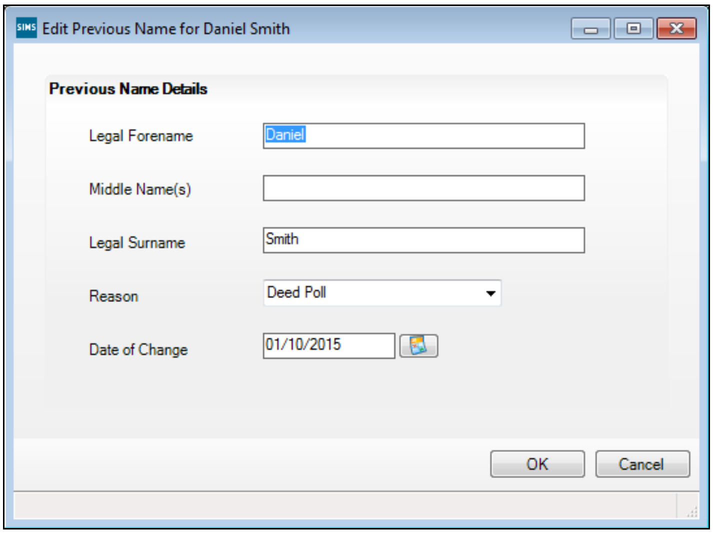
   The pupil/student's name is now displayed correctly.

Correcting/Removing a Pupil/Student's Previous Name

1. In the **Basic Details** panel, click the **History** button to display the **Previous Names** dialog.



2. Any existing previous names for the pupil/student are displayed together with the **Reason** and **Date of Change**.
3. Highlight the previous name that needs to be corrected and click the **Open** button to display the **Edit Previous Name** dialog. To delete the previous name, highlight the name then click the **Delete** button.

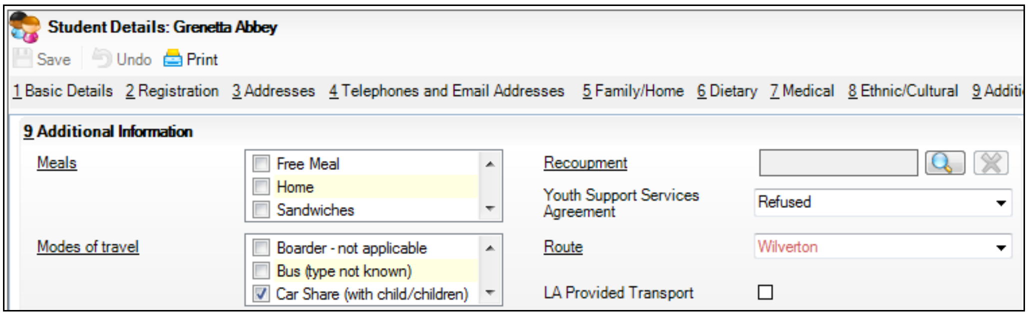


4. Correct the relevant details and click the **OK** button to close the dialog and return to the **Previous Names** dialog. The **Date of Change** should be completed to indicate when the pupil/student's previous name ceased to be used by them. The **Reason** for change is not mandatory but should be completed to maintain a full history of the name change.

   If a previous name change has already been recorded for the pupil/student on this date, SIMS displays the following warning message: **The Legal name for (Pupil/Student Name) has previously been changed for the selected date. Please re-select the date or change the existing previous name.** The correct details of the pupil/student's previous name are now displayed.

Selecting Values from Lists

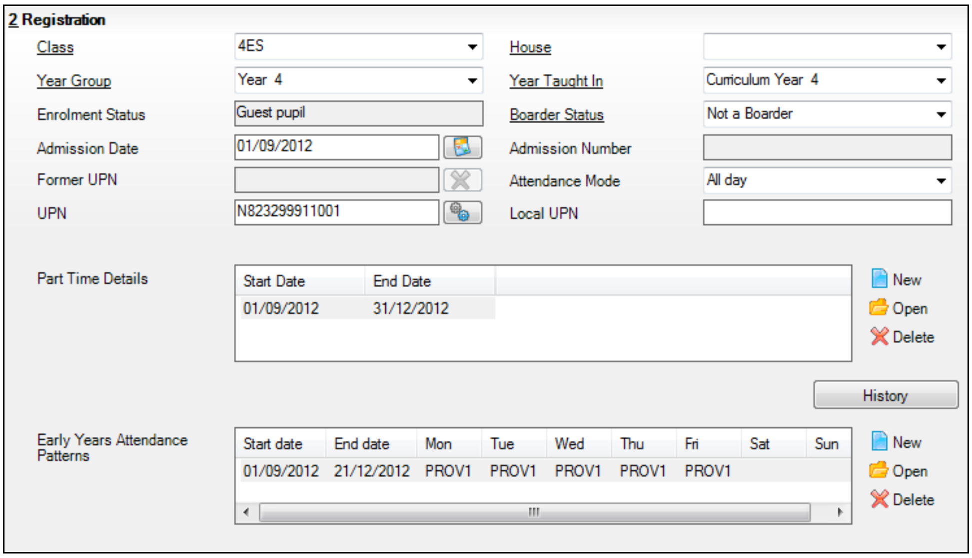
> *NOTE: Lookup values in drop-down lists which appear in red text (or another colour if the **Unusual Value Text Colour** has been changed from its default setting of red in **Tools | Setups | User Options**) are values which have been set to inactive since they were selected in the pupil/student record.*



Adding/Editing Registration Information

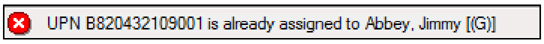
> ***IMPORTANT NOTE:** The DfE advises that schools in Consortium arrangements may register their pupil/students Single and Guest, rather than Dual Registered – Main and Dual Registered – Subsidiary.*

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Registration** hyperlink to display the **Registration** panel.



3. Select the **Registration Group/Class**, **Year Group** (mandatory) and **House** (if applicable) into which the pupil/student will be placed, from the appropriate drop-down lists.

4. The **Enrolment Status** field is read-only and you must navigate to **Routines | Pupil** (or **Student**) **| Change Enrolment Status** to edit the status (please see *Changing the Enrolment Status* on page *183*).
   - **Single Registration** - a normal, full-time pupil/student who is registered only at your school.
   - **Guest Pupil** - a pupil/student who attends your school for some of their lessons, but predominantly attends their Main school. Guest pupil/students are not registered at your school and do not have an admission number.
   - **Main-Dual Registration** - a pupil/student who is also registered at another school for some of their timetable, but the majority of their time is spent at your school.
   - **Subsidiary-Dual Registration** - a pupil/student who is also registered at another school for the majority of their timetable and only a minority of their time is spent at your school.
   - **FE College** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at an FE College and only a minority of their time is spent at your school.
   - **Other Provider** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at another provider and only a minority of their time is spent at your school.
5. If a UPN that is a duplicate of an existing UPN is manually entered into a pupil/student's record, an error message is displayed, indicating which pupil/student, applicant or leaver already has that UPN assigned to them. The error message takes the form: **<UPN number> is already assigned to <name><registration group>**.



6. Select the **Year Taught In** (mandatory) from the drop-down list. The National Curriculum Year Group (Year Taught In) is the year group in which the pupil/student is taught for the majority of the time, regardless of their chronological age. In most cases, this will be the same as the Year Group. However, some children are taught, for example, in the year above or below the expected year (based on their age), perhaps because they are academically advanced or behind. It is very important that the correct **Year Taught In** is specified for School Census purposes.

   *NOTE: Special Schools can select **Exempt from National Curriculum** year when selecting the **Year Taught In** (as applicable), providing that this has been defined in the Pastoral Structure via **Focus | School | Pastoral Structure | Current Structure**.*

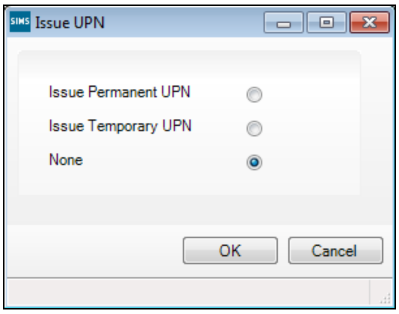
7. Select the **Boarder Status** (if applicable) e.g. **Not a Boarder** or **Boarder – night not specified** from the drop-down list.
8. Enter the **Admission Date** (mandatory) or click the **Calendar** button and select the required date.

9. Enter the **UPN** or **Local UPN**, if known.
    - **Permanent UPNs** are issued to new pupil/student only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.
    - **Temporary UPNs** are issued to a pupil/student only when a school does not know the permanent UPN (e.g. awaiting transfer file/applicant's information).

    > *NOTE: UPN information is required for the School Census.*

10. If necessary, issue a new UPN by clicking the **Generate UPN** button adjacent to the **UPN** field to display the **Issue UPN** dialog.

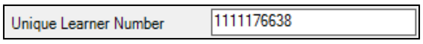
     *Generate UPN button*

    - Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button.
    - Click the **OK** button. The UPN is generated when the record is saved.

    The introduction of the **Unique Learner Number** (ULN) was in response to a government requirement for students aged 14 to 19 to be allocated a number that they retain for life. This allows people to build a lifelong record of their learning participation and achievements (their learner record), which they can access and may also choose to share. Schools can retrieve the ULN information from School to School (S2S) via CTF, or from the Managing Information Across Partners (MIAP) website (http://www.miap.gov.uk/). They can also retrieve ULN information from the LRS portal (https://www.gov.uk/education/learning-records-service-lrs). This information will also be available when students transfer between Secondary schools from the inception of CTF version 8.0 onwards.

    The **Unique Learner Number** field is used to display this information.

11. You can add the ULN to this field at any time by entering the details.
12. Select the **Attendance Mode** from the drop-down list. The completion of this field is usually only required for Nursery age children.

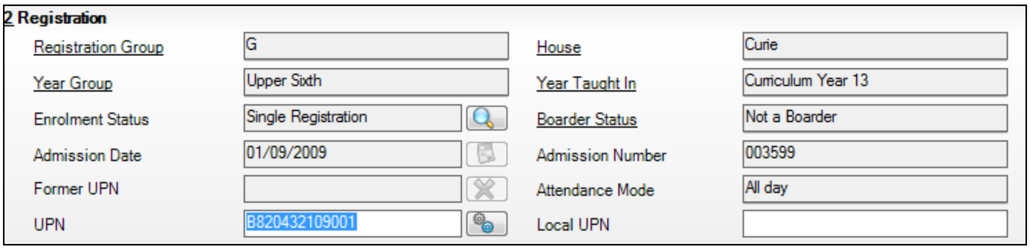
    The **UCI** (Unique Candidate Identifier) and **Exam Number** fields are read-only and populated from the information held in Examinations Organiser.

13. A history of a pupil/student's registration details can be maintained by clicking the **History** button.
14. Click the **Save** button.

Deleting a UPN

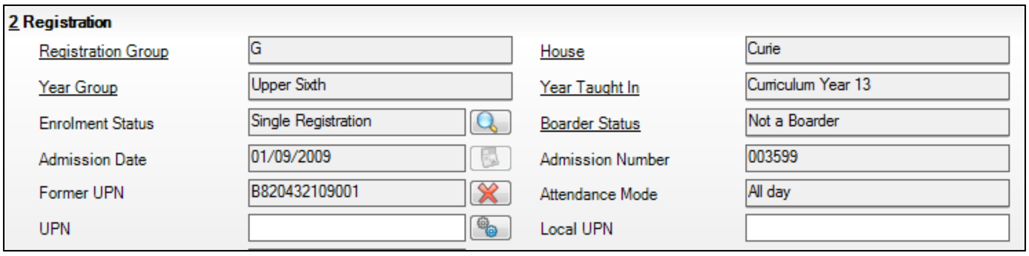
A UPN can be deleted from a pupil/student's record, if necessary.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Registration** hyperlink to display the **Registration** panel.



3. Select the contents of the **UPN** field in the **Registration** panel and press the **Delete** key.
4. Click the **Save** button.

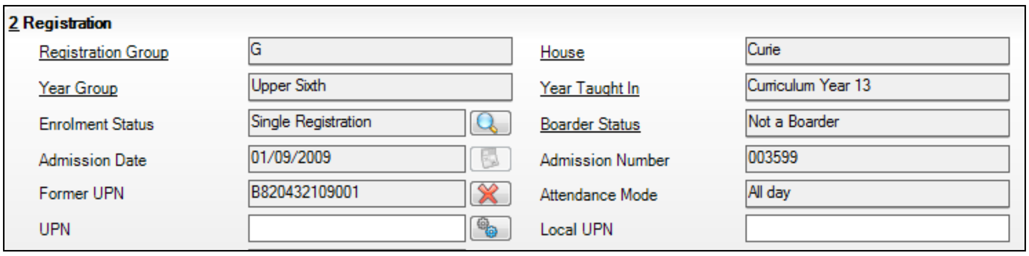
   The **UPN** field is cleared. The deleted UPN moves into the **Former UPN** field.



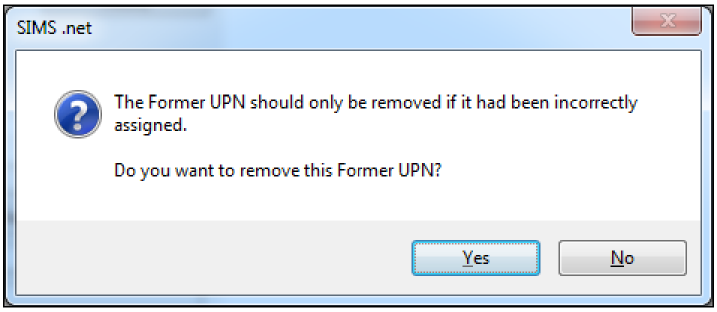
Deleting a Former UPN

A **Former UPN** can be deleted from a pupil/student's record, if necessary. An example of when this would be appropriate is a UPN that was assigned to an applicant who never attended the school.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Registration** hyperlink to display the **Registration** panel.

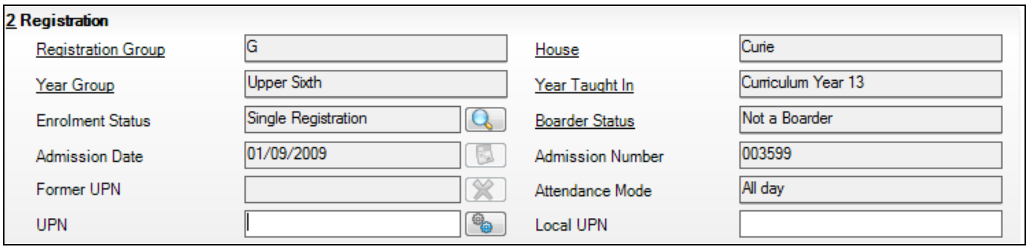


3. Click the **Delete** button adjacent to the **Former UPN** field in the **Registration** panel.



4. Click the **Yes** button to confirm the deletion.

   The **Former UPN** field is cleared.



5. Click the **Save** button.

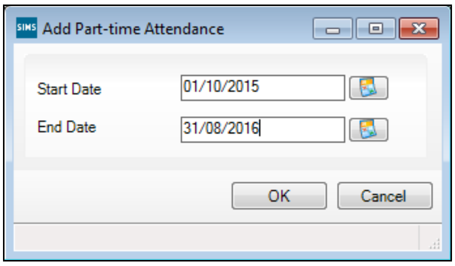
   The UPN can now be re-used.

Adding/Editing Part-time Details

1. If the pupil/student will be attending school on a part time basis, select **AM only** or **PM only** from the **Attendance Mode** drop-down list. This is usually only required for nursery aged children.

   > *NOTE: Part-time attendance is allowable for all ages and is considered to be anything less than 10 sessions per week. It refers to part-time in education, not part-time in one or more establishments.*

2. You need to specify the period during which this arrangement will apply by clicking the **New** button to display the **Add Part-time Attendance** dialog.



3. The **Start Date** defaults to today's date and the **End Date** defaults to the first day of the next academic year. Edit these dates as required then click the **OK** button.

> *NOTE: Appropriate records are created in Attendance (if in use), when the record is saved. It is important to edit this information should a pupil/student no longer be part-time – an **End Date** should be added and the **Attendance Mode** drop-down list should be changed to **All Day**.*

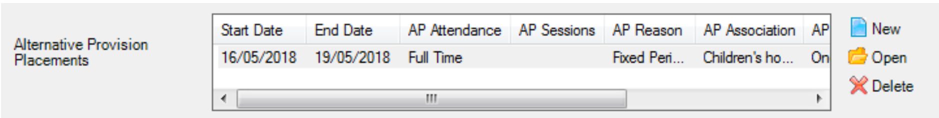
Adding/Editing Alternative Provision Placement Details

The DfE has removed the requirement to collect Alternative Provision Placement information from the School Census specification, so there is no requirement from the DfE for this data to be collected or held. Should schools decide to collect, process or retain data on Alternative Provision Placements for their own purposes, a lawful basis for this processing must be identified by the school, as outlined in GDPR articles 6 and 9. More information on lawful bases for processing can be found on the ICO website (https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/#ib3).

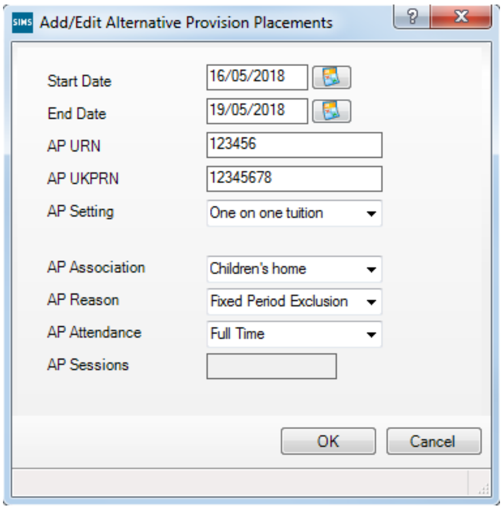
An Alternative Provision Placement arranged by a school is defined as:

- education arranged by schools for a pupil/student on a fixed period exclusion
- schools directing a pupil/student to off-site provision to improve their behaviour.

They can be recorded in the **Alternative Provision Placements** panel.



1. Click the **New** button adjacent to the **Alternative Provision Placements** panel to display the **Add/Edit Alternative Provision Placements** dialog. Alternatively, highlight an existing record and click the **Open** button.



2. Select the **Start Date** and **End Date** from the Calendars.

3. Enter the **AP URN** (Alternative Provision Unique Reference Number) and **AP UKPRN** (Alternative Provision United Kingdom Provider Reference Number) of the establishment.
4. Select the **AP Setting**, **AP Association**, **AP Reason** and **AP Attendance** from the drop-down lists, if required.
   - **AP Setting** is recorded when either the URN or UKPRN are not available and the type of setting within which the pupil/student has taken up an Alternative Provision Placement.
   - **AP Association** records whether the placement is associated with any other services that are not education and are supporting the pupil/student.
   - **AP Reason** is the reason for a pupil/student going into the Alternative Provision Placement and why the placement has been commissioned.
   - **AP Attendance** records the pupil/student's planned attendance pattern at the Alternative Provision provider, .e.g **Full Time**.
5. If **Part Time** is selected from the **AP Attendance** drop-down list, enter the number of **AP Sessions**.
6. Click the **OK** button to save the record and return to the **Pupil** (or **Student**) **Details** page.

Setting up Early Years Attendance Patterns for Pupils

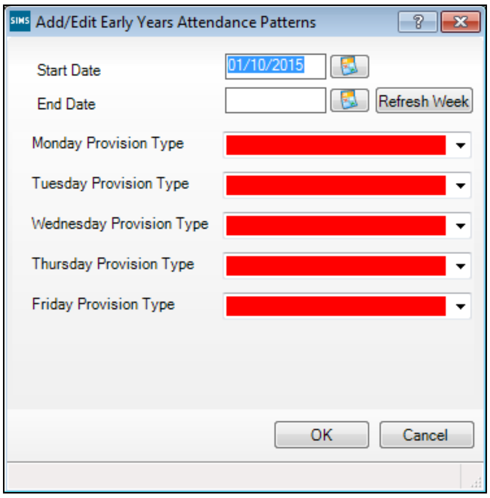
Applicable to English Primary Schools Only (including Independent Multiphase schools)

Parents are now entitled to receive 15 hours of free nursery provision per week, which can be taken over a minimum of three days. They can choose to take as much or as little of the 15 hour, and use their entitlement at more than one nursery provider, if they wish.

This routine enables your school to set up an early years attendance pattern for any pupil but typically two, three and four year olds. Defining a weekly attendance pattern for a pupil does not have any impact on the recording of attendance. It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and PM, that the provisions defined in the attendance patterns). For more information, please refer to the *Managing Pupil/Student Attendance* handbook.

The periods of nursery care provision that are available to parents, e.g. Provision 1 (Morning Nursery Care), must have previously been defined via **Tools | Setups | Attendance Setup | Early Years Provisions Setup**. For more information, please refer to the *Managing Pupil/Student Attendance* handbook.

1. Click the **New** button adjacent to the **Early Years Attendance Patterns** section to display the **Add/Edit Early Years Attendance Patterns** dialog.



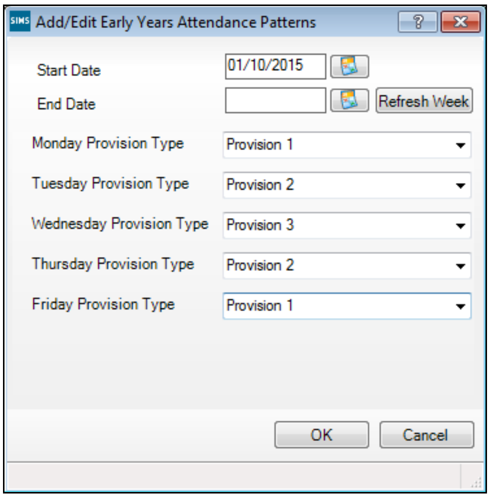
2. By default, the **Start Date** is displayed as today's date. If necessary, edit the date to indicate when the Early Years Attendance Pattern is to start or click the **Calendar** button and select the required date.

   Click the **Refresh Week** button to ensure that the correct weekly pattern of days is displayed based on the **Start Date**.

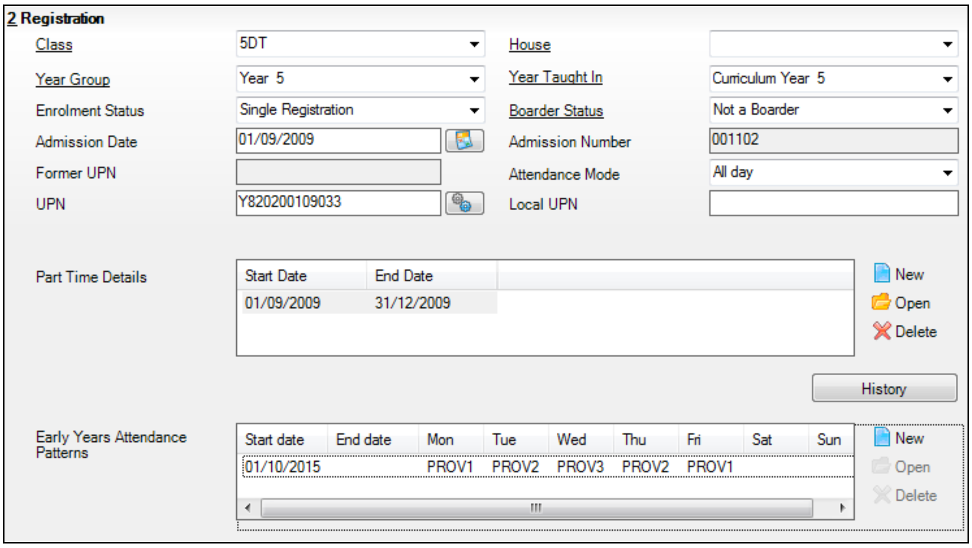
   For example:

   If the **Start Date** falls in the current academic year for which your school's week pattern is 5 days (Monday to Friday), Monday to Friday is displayed.

   However, if the **Start Date** falls in the next academic year for which the week patterns is 6 days (Monday to Saturday), Monday to Saturday is displayed.
3. Enter an **End Date** for the Early Years Attendance Pattern (if known) or click the **Calendar** button and select the required date. This date can be entered later.
4. Select each day's **Provision Type** from the associated drop-down list. Select from **Provision 1**, **Provision 2**, **Provision 3** or **No Provision**.



5. Click the **OK** button to return to the **Registration** panel.



6. Click the **Save** button to retain the Early Years Attendance Pattern for that pupil.
7. To edit an Early Years Attendance Pattern:
   a. Highlight the provision record then click the **Open** button to display the **Add/Edit Early Years Attendance Patterns** dialog. All items are editable.
   b. Edit the details, as required then click the **OK** button to return to the **Registration** panel.
   c. Click the **Save** button to retain your changes.
8. To delete an Early Years Attendance Pattern, highlight the provision record then click the **Delete** button. The record is deleted immediately.

Changing the Enrolment Status

> ***IMPORTANT NOTE:*** *The DfE advises that schools in Consortium arrangements may register their pupil/students Single and Guest, rather than Dual Registered – Main and Dual Registered – Subsidiary.*
> *For full details of the advice from the DfE, please refer to the official DfE guidance notes, which are available from the My Account website (https://myaccount.capita-cs.co.uk).*

There may be occasions when an enrolment status for an applicant or pupil/student needs to be amended. The following enrolment statuses are available:

- **Single Registration** - this status represents a normal, full-time pupil/student who is only registered as on-roll at your school.
- **Guest Pupil** - this status represents a pupil/student who is on-roll at another school, but attends your school for certain lessons. There is no need to register them as on-roll at your school.
- **Main-Dual Registration** - this status indicates that the pupil/student is registered at another school for some of their timetable, but the majority of their time is spent at your school. This status carries legal and financial implications and should only be used after agreement with the other school involved.
- **Subsidiary-Dual Registration** - this status indicates that the pupil/student is registered at another school for the majority of their timetable and only a minority of their time is spent at your school. This status carries legal and financial implications and should only be used after agreement with the other school involved.
- **FE College** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at an FE College and only a minority of their time is spent at your school.
- **Other Provider** (applicable to Pupil Referral Units in England only) - this status indicates that the pupil/student is registered at another provider and only a minority of their time is spent at your school.

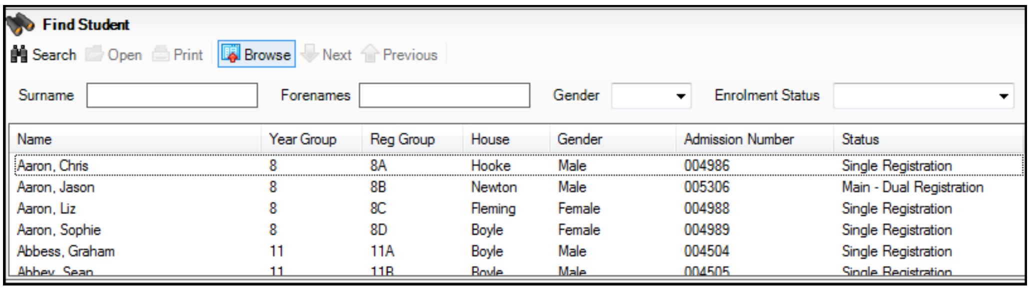
All pupil/students who are registered as on-roll, including Dual Registration pupil/students, must have their attendance details recorded.

Maintained schools in England that have Dual Registered pupil/students must use **D - Dual Registered (attending other establishment)** to signify the sessions that these pupil/students attend.

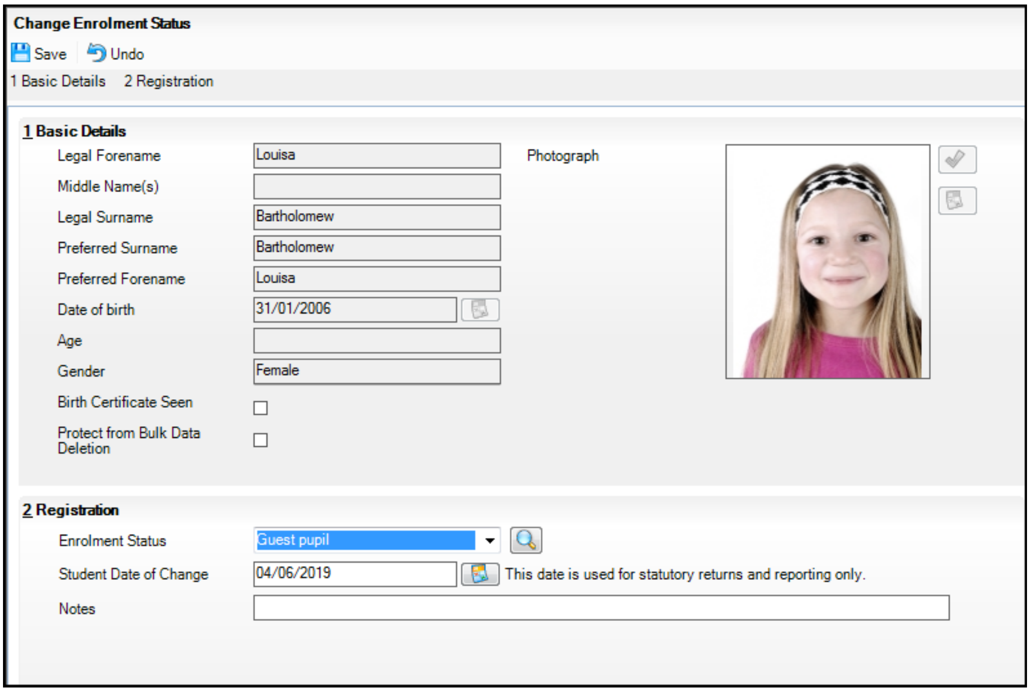
IMPORTANT NOTE: *If a pupil/student is on-roll until Year 11 then comes back into Year 12 as a guest, you need to make them a leaver at the end of Year 11, re-admit them into Year 12 and then change the registration status to* ***Guest****.*

NOTE: This routine can be run only for pupil/students in the current academic year.

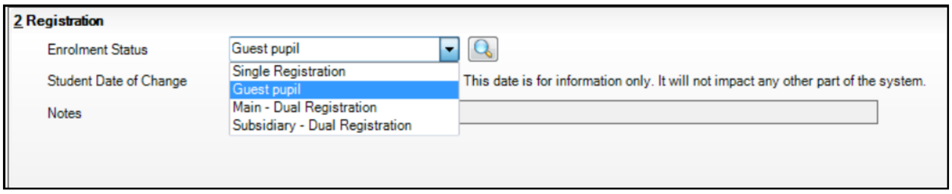
1. Select **Routines | Pupil** (or **Student**) **| Change Enrolment Status** to display the **Find Student** browser.



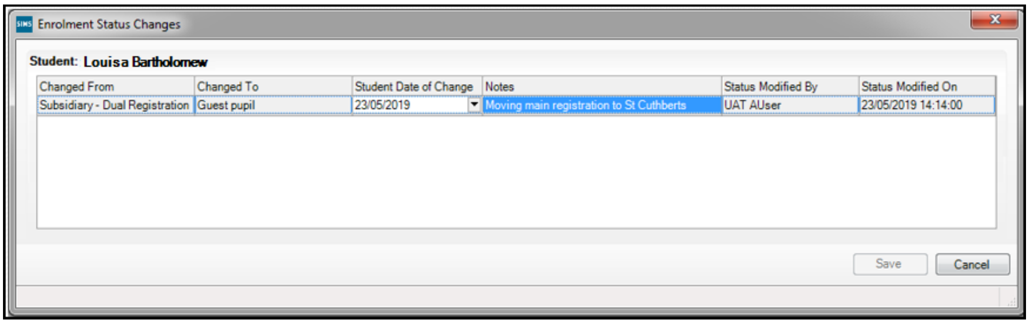
2. Search for the required pupil/student then click the **Open** button to display the **Change Enrolment Status** page.



3. Click the **Registration** hyperlink to display the **Registration** panel.
4. Select the required status from the **Enrolment Status** drop-down arrow, such as **Main – Dual Registration**.



5. Click the adjacent magnifying glass button to view the **Enrolment Status Changes** dialog, if applicable.

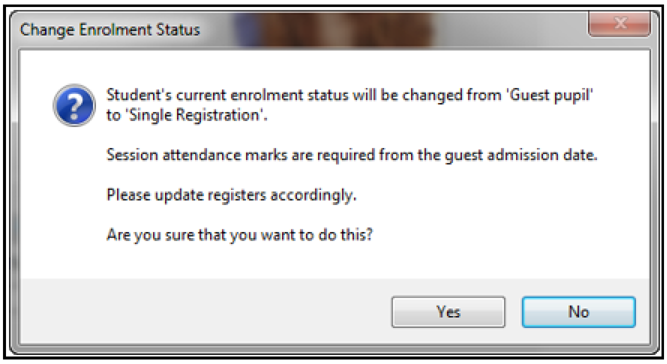


The **Status Modified By** column displays the name of the staff member who changed the pupil/student's enrolment status. The **Status Modified On** column reflects the date on which the change was made.

The **Student Date of Change** defaults to today's date but can be amended.

6. Enter any **Notes**.
7. Click the **Save** button.

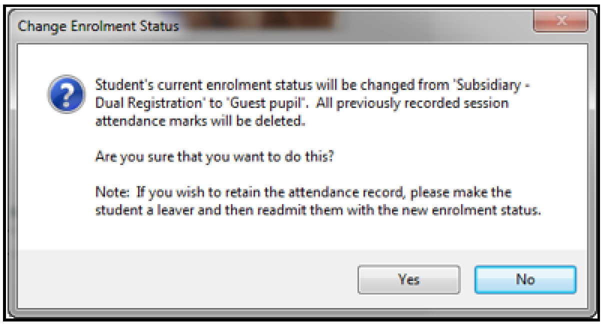
   If the pupil/student's enrolment status is changed from **Guest Pupil** (or **Student**) to **Single Registration**, **Main Dual Registration** or **Subsidiary Dual Registration**, a message similar to the following is displayed.



IMPORTANT NOTE: *Read the message text carefully before proceeding.*

SIMS allocates the pupil/student a new admission number. You may need to go into **Attendance** and check/correct the necessary attendance marks. For example, if the pupil/student was a guest from 1st July and then made Single Registration on 18th July, you will need to enter attendance marks from 1st-18th July.

If the pupil/student's enrolment status is changed from **Registered (Single**, **Main Dual or Subsidiary Dual)** to **Guest Pupil** (or **Student**) or vice versa, a message similar to the following is displayed.



SIMS removes the admission number that was previously allocated when the pupil/student was on-roll together with all the attendance marks relating to their current enrolment status.

IMPORTANT NOTE: *Read the message text carefully before proceeding.*

8. Click the **Save** button.

Changing the Date of Admission

> ***IMPORTANT NOTE:*** *Do not re-admit a pupil/student by changing the* ***Admission Date****. Ensure that you re-admit pupil/students using the correct method (please see* Re-admitting Pupil/Students *on page* 302*).*

1. Select **Focus | Pupil (or Student) | Student Details** to display the **Find Student** browser.
2. After searching for the required pupil/student, click the **Registration** hyperlink to display their **Registration** panel.
3. Click the **Calendar** button adjacent to the **Admission Date** field and select an alternative date of admission. This date can be in the past, present or the future.
4. Click the **Save** button to save the changes.
5. The following warning message is displayed: `You are changing the DOA for this student. If the student is being readmitted please follow the correct procedure for readmission. Would you like to continue?`

   Click the **Yes** button to continue.

   SIMS validates the changes based on the following criteria:

   - A date of admission has been entered.
   - The date of admission is not prior to the pupil/student's date of birth.
   - If the pupil/student has already left the school, that the date of admission is prior to their date of leaving.
   - The date of admission does not overlap with a previous period of time that the pupil/student was on-roll or a guest at the school.

   If the date of admission (DOA) has been changed to a date that occurs after the previously entered DOA, SIMS displays the following message: `The pupil/student's date of admission has changed from <old date> to <new date>. All registration information and attendance marks between these dates will be deleted. Do you wish to continue?`

   If the date of admission has been changed to a date that occurs before the previously entered DOA, SIMS displays the following message: `The pupil/student's date of admission has changed from <old date> to <new date>. You may need to adjust the student's registration history and enter attendance marks. Do you wish to continue?`

> *NOTE: If the new admission date has been changed to a date that occurs before the previously entered DOA, the missing attendance marks need to be entered manually. Only attendance marks for the current academic year can be entered. If the new date of admission is in a previous academic year, it is not possible to enter the required attendance marks.*

Saving the Record

Once all the required information has been entered, click the **Save** button on the toolbar. Any missing mandatory information is highlighted in red together with a warning message which is displayed on the Status Bar. This information must be completed before the record can be saved.

The **Admission Number** is automatically generated when the record is saved.

Adding/Editing an Address

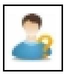
When adding addresses, the most efficient method is to search for any existing addresses which can either be opened or copied. In addition to searching your SIMS database, if you have activated the Address Validation Service, it is also possible to search an external database via the Internet by entering a post code and matching it to a corresponding address. This significantly reduces the amount of address data entry required. Please refer to the *Setting Up and Administering SIMS* handbook for more information on setting up the Address Validation Service*.*

There are two modes for entering an address – **Basic** or **Advanced**.

Basic - a post code must be provided together with a house number or name if available. A search is carried out on both the SIMS database and the Web Address Validation Service. This is the most efficient method.

Advanced - a post code, street or town/city must be supplied. The search is only carried out on existing addresses in the SIMS database. If the Address Validation Service has not been activated, this will be the method used.

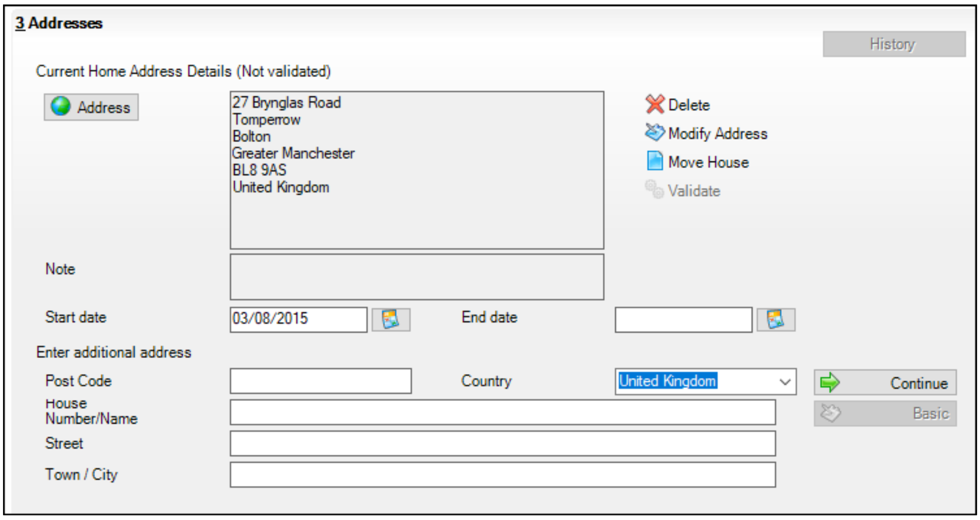
> ***IMPORTANT NOTE:*** *When adding an address to an application record (via the* ***Application*** *icon on the toolbar or* ***Focus | Admission | Application****), the address is transferred to the pupil/student's main record on the date they are actually admitted to the school, rather than the Date of Admission of their intake group.*



Application icon

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

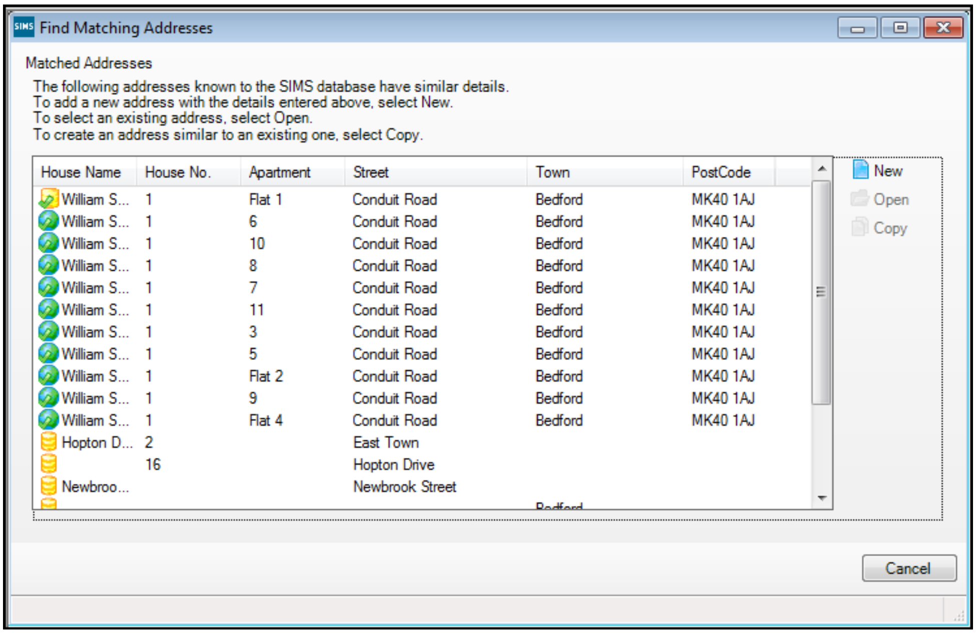
2. Click the **Addresses** hyperlink to display the **Addresses** panel.



Adding an Address Using Basic Mode

1. Enter the **Post Code** and if available, the **House Number/Name**.

2. Click the **Continue** button. A list of addresses matching the entered post code is returned in the **Find Matching Addresses** dialog.

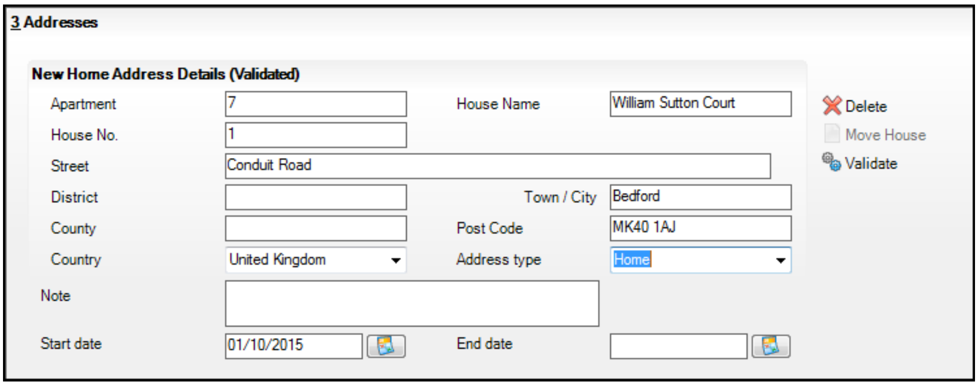


- If an exact match is found, highlight the required address then click the **Open** button to select it. The following icons help to identify the type of address:

 *Identifies an address currently on the web service.*

 *Identifies a local address that has not yet been validated.*

 *Identifies a local address that has been validated.*



The address is displayed in the **Addresses** panel and is highlighted as **Validated**.

> *NOTES: When recording some addresses (such as pupil/student), it is possible to select an **Address type** which defaults to the type applicable to addresses being added. For example, if the address is for a contact, the type defaults to **Home**. If this is an address for an agency, the type defaults to **Work**.*
>
> *It is also possible to add **Notes** and/or **Start** and **End** dates to some addresses.*

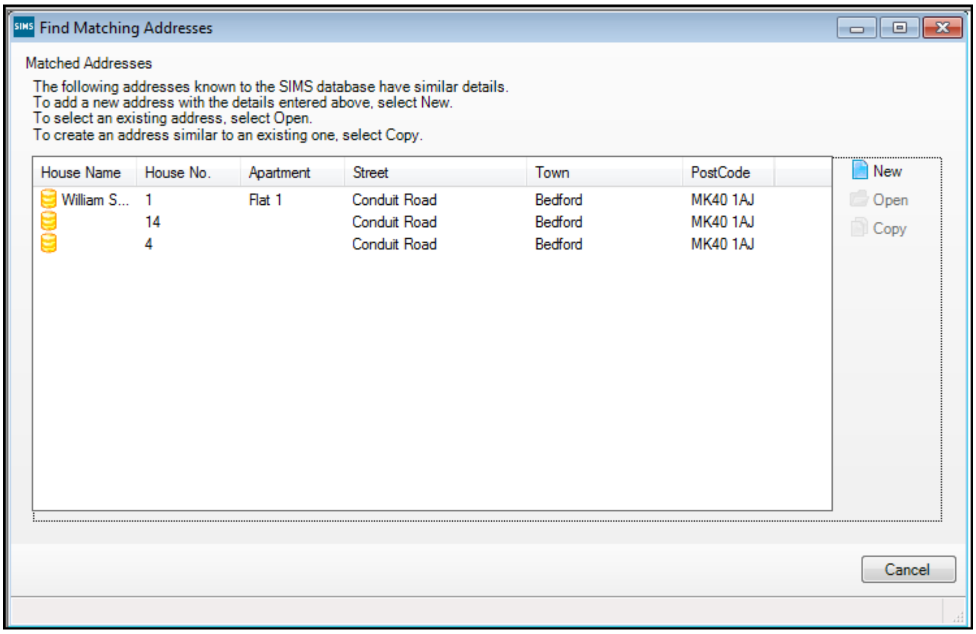
- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
- If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.

3. Complete any remaining fields as required, ensuring that the type of address, e.g. **Home** is selected from the **Address type** drop-down list.

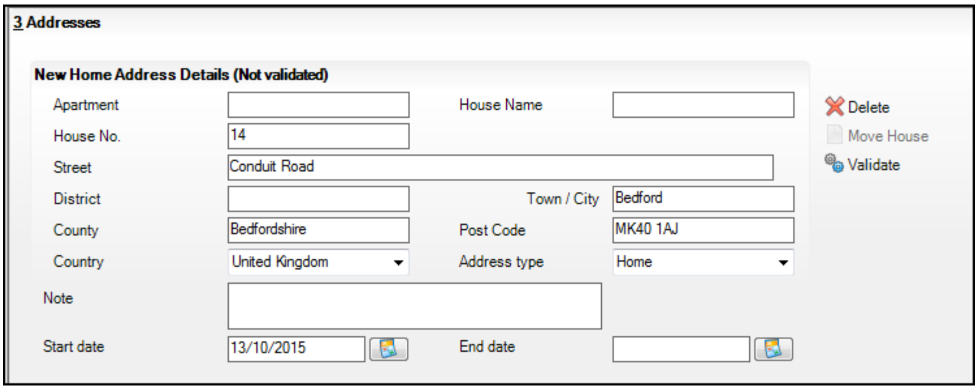
Adding an Address Using Advanced Mode

1. If the post code is not known, click the **Advanced** button to display additional address fields. A minimum of either **Street** or **Town/City** must be supplied.

2. Click the **Continue** button to search existing addresses in your SIMS database. A list of matching addresses is returned in the **Find Matching Addresses** dialog.



- If an exact match is found, select the required address then click the **Open** button to select it.



The address is displayed in the **Addresses** panel and is highlighted as **Not validated**.

> *NOTES: When recording some addresses (such as pupil/student), it is possible to select an **Address type** which defaults to the type applicable to addresses being added. For example, if the address is for a contact, the type defaults to **Home**. If this is an address for an agency, the type defaults to **Work**.*
>
> *It is also possible to add **Notes** and/or **Start** and **End** dates to some addresses.*

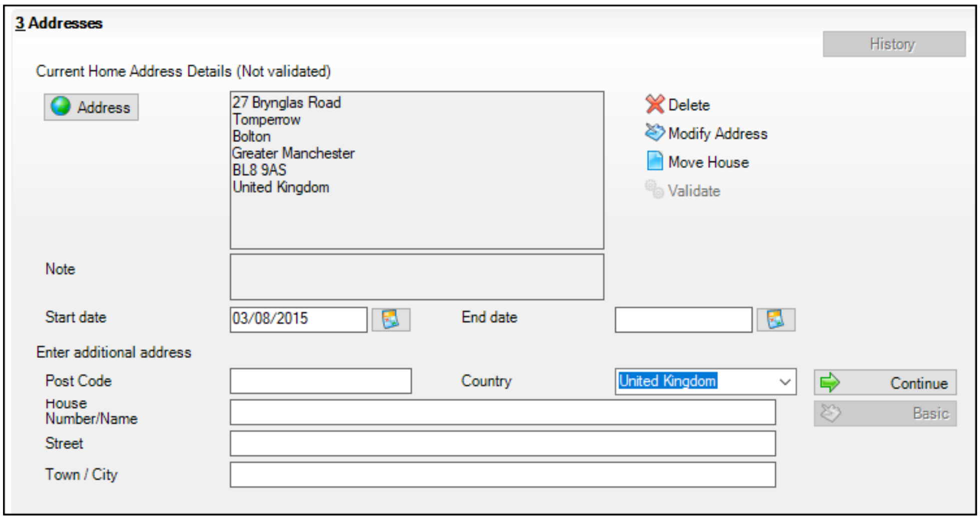
- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
- If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.

3. Complete any remaining fields as required, ensuring that the type of address, e.g. **Home** is selected from the **Address type** drop-down list.

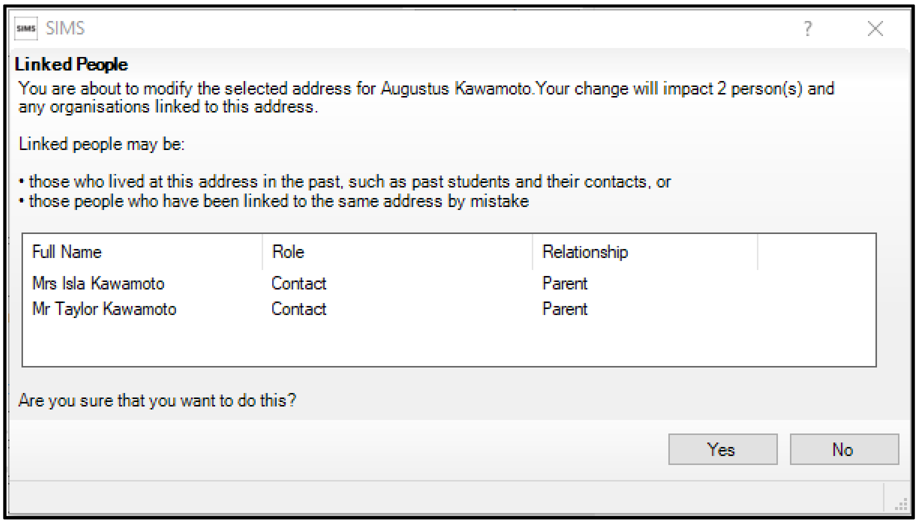
Modifying a Pupil/Student's Address

The Modify Address process should be used when making amendments to a current address only. It should not be used to record a different address for a pupil/student; for this activity, use the Move House process.

1. Click the **Addresses** hyperlink to display the **Addresses** panel.
2. Click the **Modify Address** button.



Any parent/guardians, applicants, staff or other contacts who share the same address as the pupil/student are displayed in the **Linked People** dialog.



A confirmation message is displayed when changing the pupil/student's current address, advising that all other people registered at this address will be affected by the change.

3. If you want to determine why some of the additional people are associated with the pupil/student's address when they do not appear to be related, click the **No** button and investigate their records in SIMS before continuing.

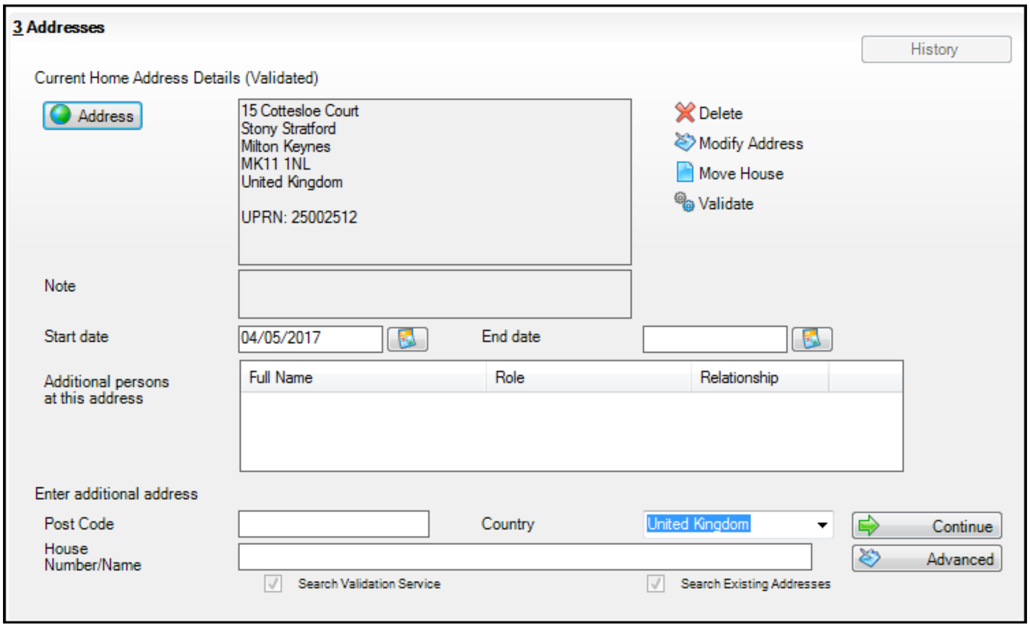
   Alternatively, click the **Yes** button to confirm the change of address for all the people associated with this address.

   For any changes to persons linked to the pupil/student's address to be visible in the pupil/student record, the pupil/student record must be re-opened.

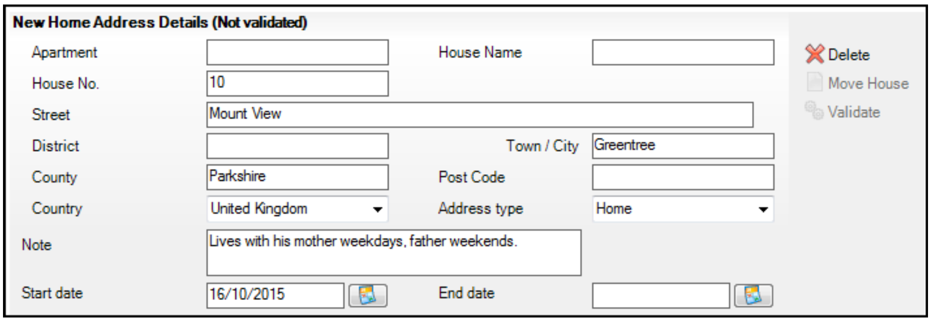
4. Edit the address fields and click the **Save** button.

Recording an Additional Address

Some pupil/students or applicants may have more than one address. This may be because they share their time living between parents who have separated and now live at different addresses, or live in one place during the school term and another place during the school holidays.



These additional addresses can be added using exactly the same methods as described in the previous section, but entering applicable information in the **Enter additional address** section.



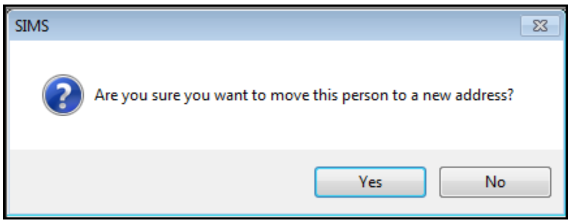
1. In addition to the normal address details, select the **Address type** from the drop-down list, e.g. **Second Home**.
2. Enter any applicable **Notes** that explain the additional address, e.g. `Lives with his mother weekdays, father at weekends.`

Moving a Pupil/Student's Home Address

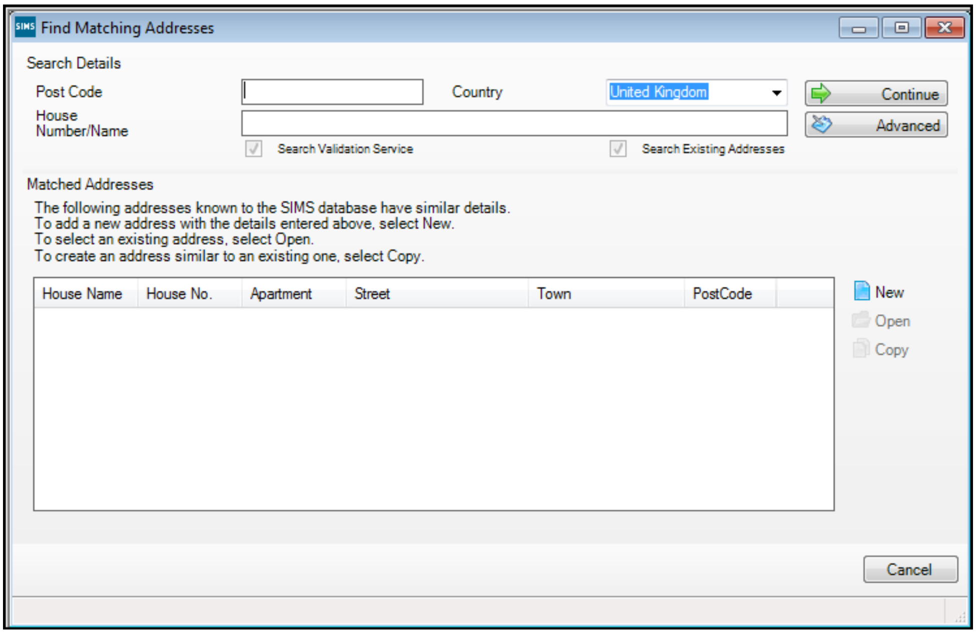
If a pupil/student has an existing home address recorded in the system and you receive notification that their family are moving house, you need to record that the address has changed.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

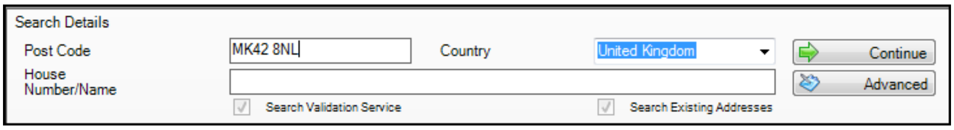
2. Click the **Addresses** hyperlink to display the **Addresses** panel.
3. Click the **Move House** button adjacent to the **Current Home Address Details** panel to display the following warning message.



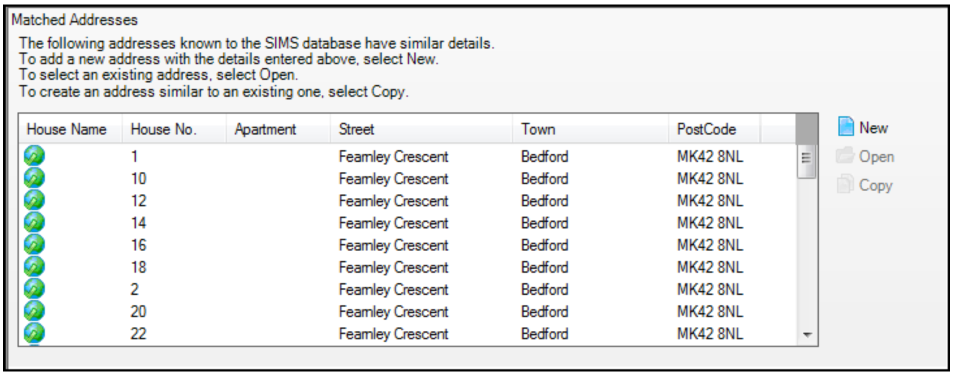
4. Click the **Yes** button to display the **Find Matching Addresses** dialog.



5. If known, enter the **Post Code** and the **House Number/Name**. If the post code is not known, complete as much of the address as possible (either **Street** or **Town/City** must be supplied). It is advisable to search by entering minimal data such as the **Post Code** and then click the **Continue** button.

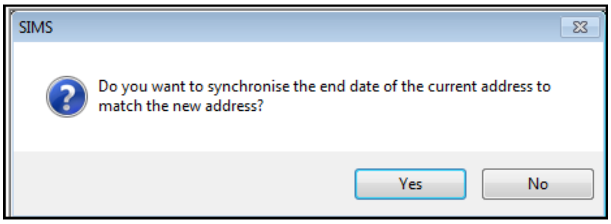


6. Any addresses matching the search criteria entered are displayed in the **Matched Addresses** panel.



- If an exact match is found, select the required address then click the **Open** button to select it. The address is displayed in the **Addresses** panel and is highlighted as **Validated**.
- If a similar address is identified in the **Find Matching Addresses** dialog, highlight it then click the **Copy** button to create a copy which can be amended as required.
- If the required address does not exist, click the **New** button in the **Find Matching Addresses** dialog. The **New Address Details (Not validated)** panel is displayed and is populated with the address details first entered in the search.

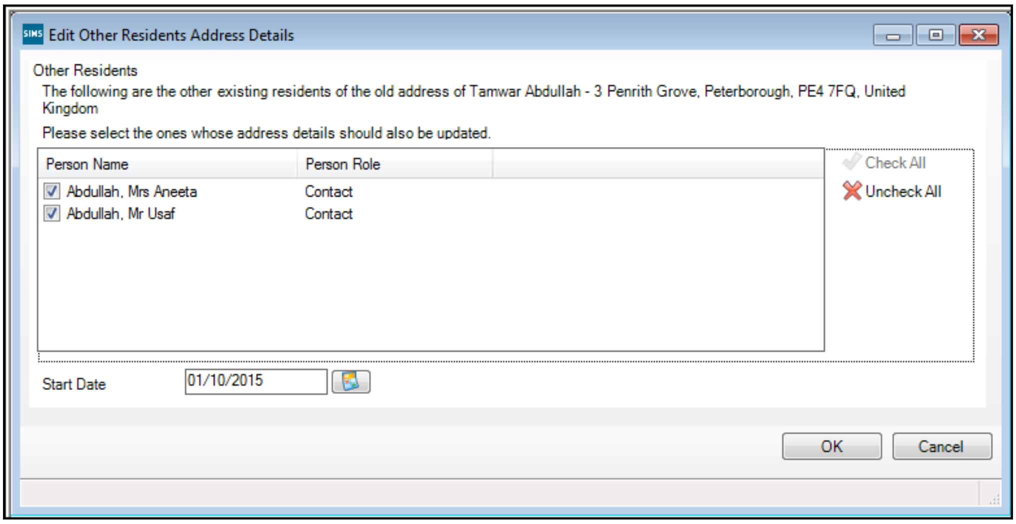
7. Whichever option is chosen (new, open or copy), the following warning message is displayed:



8. Click the **Yes** button. This adds an end date to the current address of the day before the start date of the new address (specified in the next step).

*NOTE: If you click the **No** button, no end date will applied to the current address and the pupil/student is listed as having multiple addresses. You will not be able to save until you manually enter an **End Date** for the current address.*

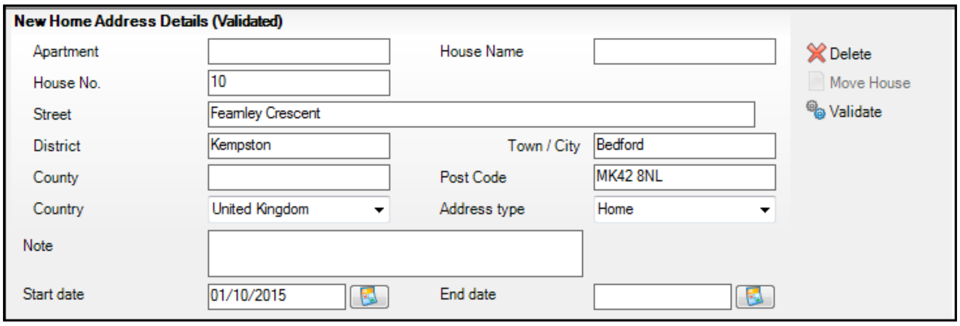
9. If there are other people entered in SIMS who live at the same current address as the pupil/student, the following **Edit Other Residents Address Details** dialog is displayed, enabling you to decide whether these people should also move to the new address:



All the people listed as residing at the same address are automatically selected as moving to the new address. If anyone is not moving, ensure that the check box adjacent to their name is <u>not</u> selected.

Enter the **Start Date** for the new address, then click the **OK** button.

10. The appropriate panel is then displayed (either **New Home Address Details** or **Current Home Address Details**). Complete the required address fields.



> *NOTE: If an existing address was opened from the Web Address Validation Service, then the panel will be labelled* ***New Home Address Details (Validated)****.*

11. The **Start date** for the new address is populated with the date entered previously. If you choose to edit this date, it will only be edited for the pupil/student and not for anyone else living at the same address. An end date of one day before the start date entered is automatically added to the current address.
12. If the new address is for a limited time, enter an **End Date**.
13. Click the **Save** button on the toolbar to confirm the change of address.

Recording Telephone Numbers and Email Addresses

Pupil/student telephone and email addresses can be recorded separately to the numbers/email addresses of their contacts.

Recording Telephone Numbers

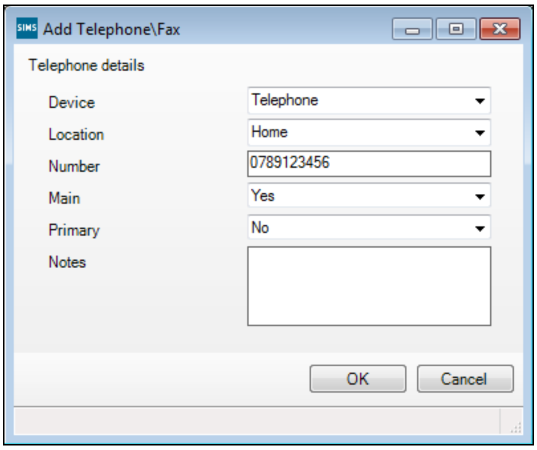
A range of telephone numbers can be recorded for a pupil/student and their contacts.

Setting a number as **Main** indicates the most likely number on which they can be contacted.

> ***IMPORTANT NOTE:*** *Only one **Number** per **Device** type (e.g. **Telephone** or **Fax**) can be set as **Main**.*

Only one **Primary** number can be recorded for a pupil/student and this is the number that should be used in the first instance in any communication with their parent/guardians, e.g. if their child is taken ill at school.

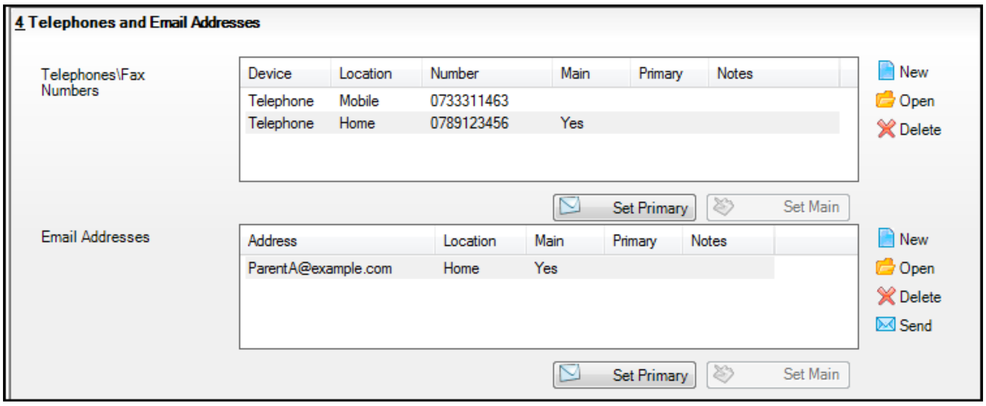
1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Telephone and Email Addresses** hyperlink to display the **Telephone and Email Addresses** panel.
3. Click the **New** button or highlight an existing number then click the **Open** button adjacent to the **Telephones\Fax Number** panel to display the **Add/Edit Telephone\Fax** dialog.



4. Select the type of **Device** (**Telephone** or **Fax**) from the drop-down list.
5. Select the **Location** (**Home**, **Work**, **Mobile**, etc.) from the drop-down list.
6. Enter the telephone or fax **Number**.

> *NOTE: The format of the telephone/fax number is optional. STD codes can be inserted in brackets if required and spaces can be added between the STD code and number if preferred.*

7. Indicate whether this is the **Main** number by selecting either **Yes** or **No** from the drop-down list. Only one **Number** per **Device** type (e.g. **Telephone** or **Fax**) can be set as **Main**. It is recommended that the main number is the number to be used in the event of an emergency.
8. Indicate if this is the **Primary** phone number by selecting **Yes** from the drop-down list. Only one phone number per contact can be set as **Primary**.
9. Enter any relevant **Notes** that may apply to the use of this telephone/fax number, e.g. `No answer machine`.
10. Click the **OK** button to add the number. Repeat as required. Any numbers added are displayed in the **Telephones\Fax Numbers** panel.



11. If required, change the **Main** number by highlighting it and clicking the **Set Main** button. Similarly, the **Primary** number can be changed by highlighting it then clicking the **Set Primary** button.
12. Click the **Save** button on the toolbar to save the new phone number.

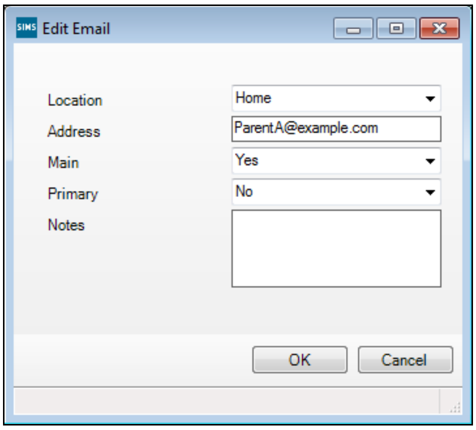
Recording Email Addresses

A range of email addresses can be recorded for a pupil/student and their contacts.

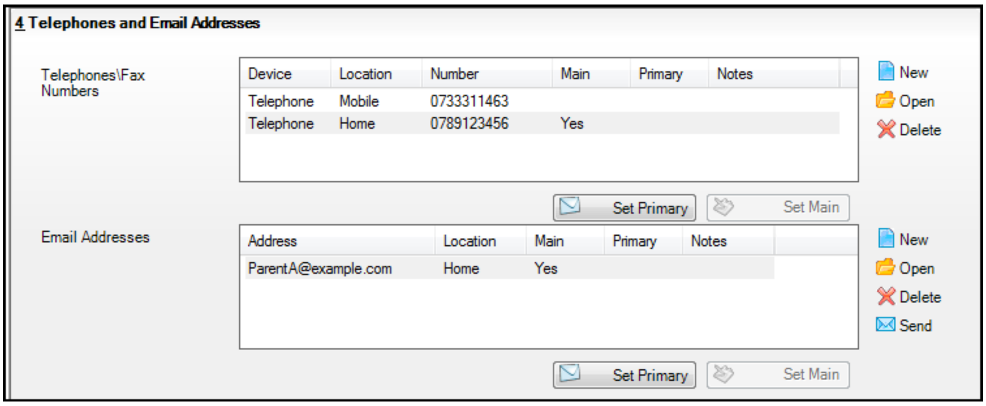
A **Main** email address can be set for each location (e.g. **Home** and **Work**). Setting an address as **Main** for a location indicates the most likely address (at that location) at which they can be contacted.

Only one **Primary** email address can be recorded for a pupil/student and this is the address that should be used in the first instance in any communication with their parent/guardians.

1. Click the **New** button or highlight an existing email address then click the **Open** button adjacent to the **Email addresses** panel to display the **Add/Edit Email** dialog.



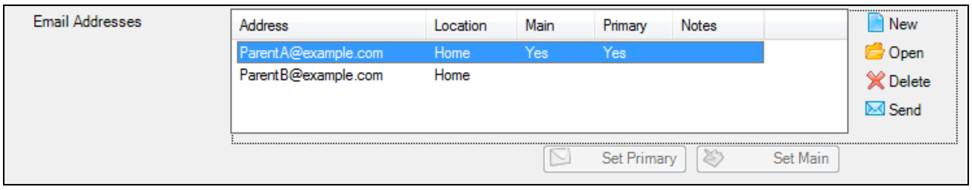
2. Specify the **Location** of the email address (**Home**, **Work** or **Other**) from the drop-down list.
3. Enter the email **Address**. The field remains red until both an **@** symbol and a full stop have been included in the email address.
4. Specify whether this is the **Main** email address by selecting either **Yes** or **No** from the drop-down list.
5. Indicate if this is the **Primary** email address by selecting **Yes** from the drop-down list. Only one email address per contact can be set as **Primary**.
6. Enter any relevant **Notes** that may apply to the use of this email address, e.g. `only checked every few days`.
7. Click the **OK** button to add the email address. Repeat as required. Any email addresses added are displayed in the **Email Addresses** panel.



8. Change the main email address if required, by clicking the **Set Main** button. Similarly, the primary email address can be changed by highlighting the required address then clicking the **Set Primary** button.
9. Click the **Save** button on the toolbar to save the new email address.

Sending Emails

Once an email address has been entered for a pupil/student, a **Send** button appears on the far right of the **Email Addresses** panel.



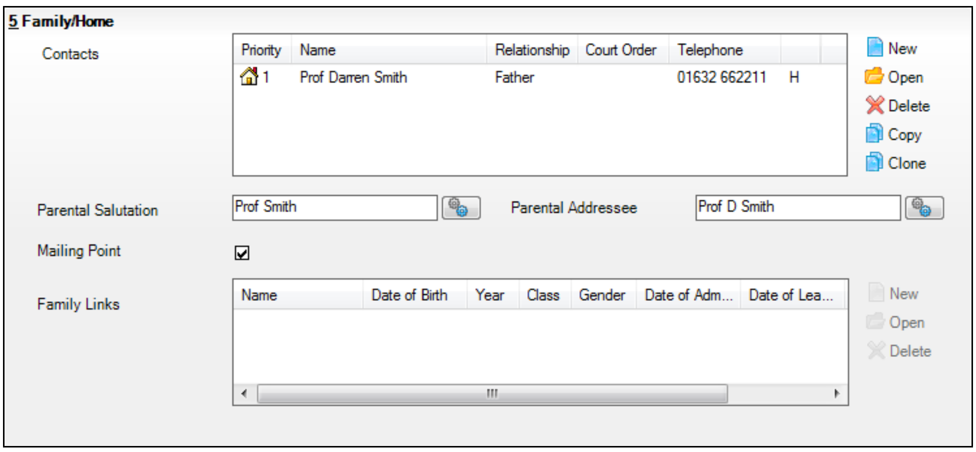
1. Clicking the **Send** button launches a MAPI compliant email dialog (such as Microsoft® Outlook or Outlook Express). The **To** field is automatically populated with the contact's email address.
2. Enter the required text and send the email in the usual way.

> *NOTE: You will not be able to use this functionality unless you have a MAPI compliant email application installed on your PC.*

Adding/Editing Family/Home Information

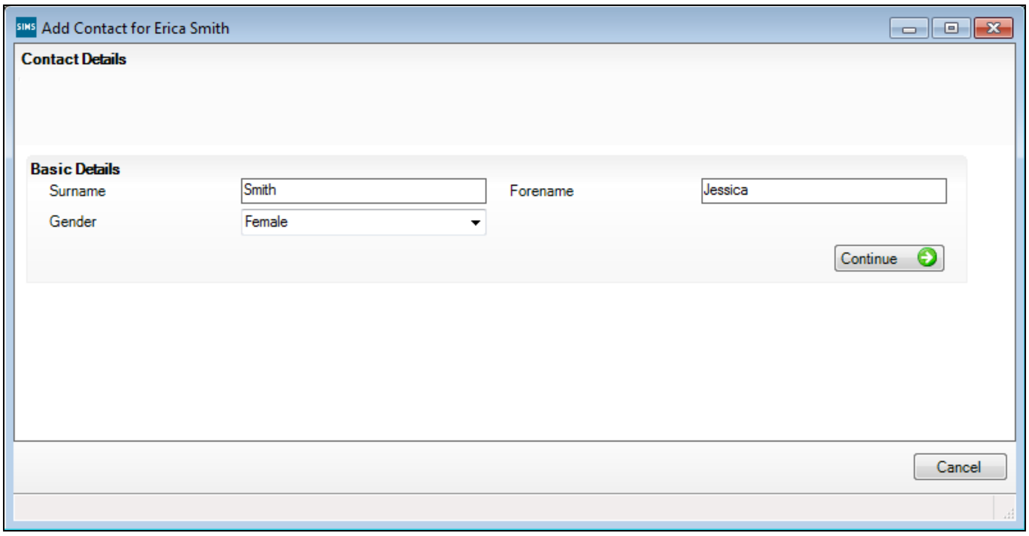
The **Family/Home** panel enables schools to record details of a pupil/student's family members, guardians or emergency contacts. Details of how to contact these people in the event of an emergency can also be recorded. To facilitate the recording of contact information, a pupil/student's home address and telephone number is copied across to any new contact associated with them (if this information is recorded).

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Family/Home** hyperlink to display the **Family/Home** panel.



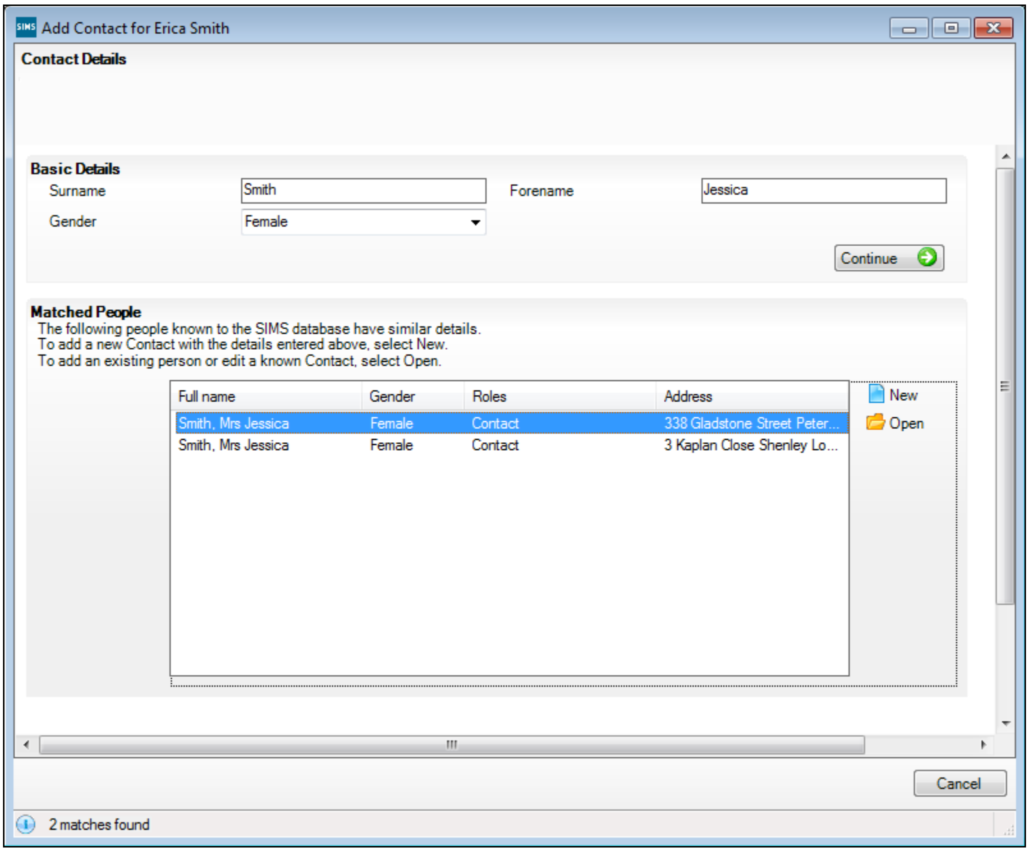
A contact who currently resides at the same address as the pupil/student can be identified by a **House** icon beside their name.

3. Click the **New** button adjacent to the **Contacts** panel to display the **Add Contact for** dialog.



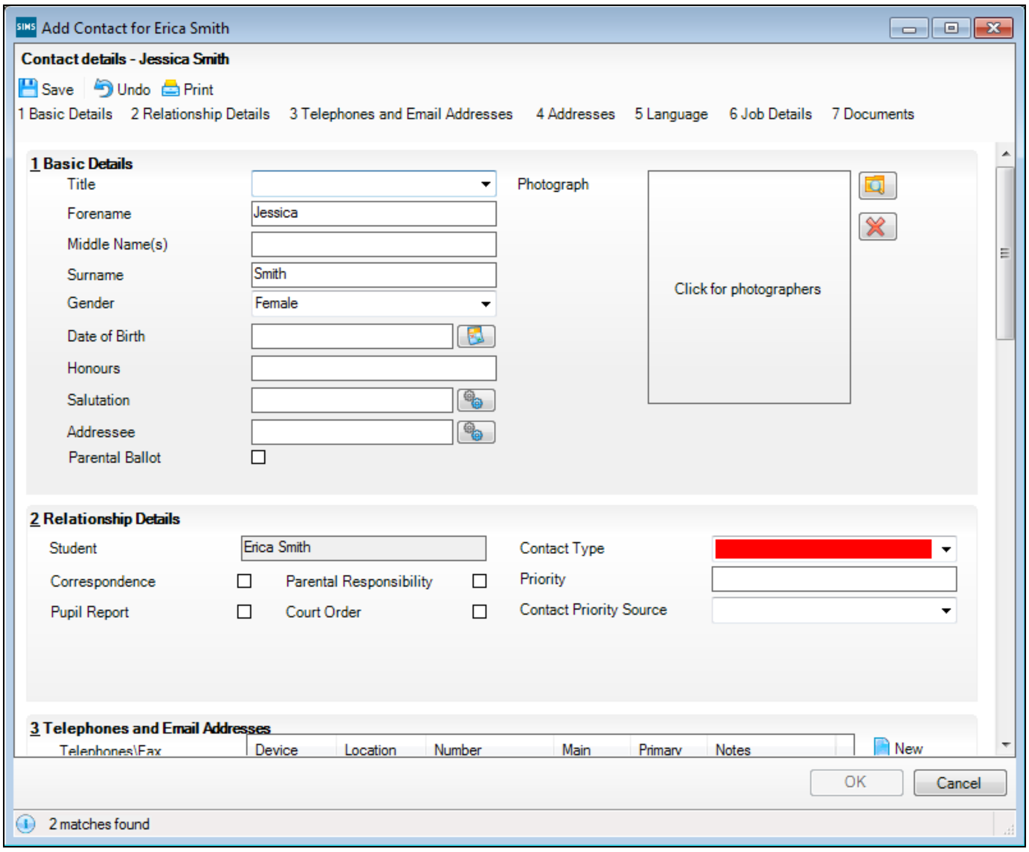
4. Enter the contact's **Surname**, **Forename** and select their **Gender** from the drop-down list. Click the **Continue** button to proceed. This process searches SIMS to see if the contact already exists (to ensure that duplicate contacts are not added).

   Any people already entered in SIMS who match the search criteria entered are displayed in the **Matched People** panel at the bottom of the dialog.



- If the required contact is displayed in the list, then they have previously been added to SIMS. Highlight their name and click the **Open** button to display their details in the **Contact Details** page for this pupil/student or applicant, where they can be edited as required. Click the **Save** button to save any changes then click the **OK** button to add the contact.
- If the required contact is not displayed in the list, you will need to add them. Click the **New** button to create a new contact. A blank record is created and displayed in the **Add Contact for [Name]** dialog.

*NOTE: Regardless of the method used to add a contact, if the pupil/student has a home address and a telephone number recorded, the contact will be given the same address and telephone number automatically. This is confirmed via a message when you click either the **Open** or **New** button. The address or telephone number can be edited on the following screen, if required.*



Recording Basic Details

1. Select the contact’s **Title** from the drop-down list.
2. Enter any known **Middle Name(s)** for the contact.
3. Enter the contact's **Date of Birth**, or click the **Calendar** button and select the required date.
4. Enter the contact’s **Honours** if applicable. They may have letters after their name, e.g. MSc, PhD, etc.

5. Select the **Parental Ballot** check box if the contact is entitled to vote in a parental ballot.

   When there is a vacant position for a parent governor in the school, it is necessary to contact all the people who are eligible to stand for election and who are eligible to vote for the final candidates. All contacts who have parental responsibility for children on-roll are eligible for the election.
6. To facilitate identification, it is possible to store photographs of pupil/student contacts. Click the **Select Files** button and navigate to the location of the contact's stored image. Highlight the required file then click the **Open** button to attach the image to the contact.
7. Click the **Generate** button adjacent to the **Salutation** and **Addressee** fields to display default text that will be used in correspondence, etc.

   > *NOTE: The **Generate** buttons are only effective if the contact's **Title**, **Forename** and **Surname** fields have all been populated.*

   It is possible to change the information displayed in the **Salutation** and **Addressee** fields by over-typing the existing information and clicking the **Save** button. The **Generate** buttons can be used to refresh the information. However, this results in previously amended information being restored to the default.

Completing Relationship Details

1. In the **Relationship Details** panel, the **Pupil (or Student)** name is already populated.
2. Select the contact’s **Contact Type** with the pupil/student. This indicates whether the contact is a family member, e.g. a child minder, etc.
3. Select the **Correspondence** and/or **Pupil Report** check boxes if required.

   > ***IMPORTANT NOTE:** By default, all contacts who have the same address as the pupil/student or applicant will automatically receive correspondence about the child (including the Pupil Report). It is necessary to select either the **Correspondence** and/or **Pupil Report** check box only if the contact does not live with the pupil/student or applicant, but wishes to receive correspondence and/or the Pupil Report. This may be required for separated parents, for example.*

4. The **Parental Responsibility** check box is used to identify whether the contact is considered a parent. A parent includes:
   - All natural parents, whether they are married or not.
   - Any person who, although not a natural parent, has parental responsibility for the pupil/student.
   - Any person who, although not a natural parent, has care of the pupil/student in the sense that they live with and look after them.
5. Enter a **Priority** for the contact within the range of 1 – 10, with 1 being the highest priority and 10 the lowest. The priority indicates the order in which contacts are alerted in the event of an accident or incident concerning the associated pupil/student or applicant.

> *NOTE: It is possible to have more than one person with the same priority. You may for example, want both a mother and father to be a priority 1.*

6. Select the **Court Order** check box if a court order is in place, restricting this contact's access to the associated pupil/student or applicant.
7. Select the **Contact Priority Source** from the drop-down list. This gives an indication of where the priority source information came from, e.g. parent, child, etc.
8. Click the **Save** button to save the details.

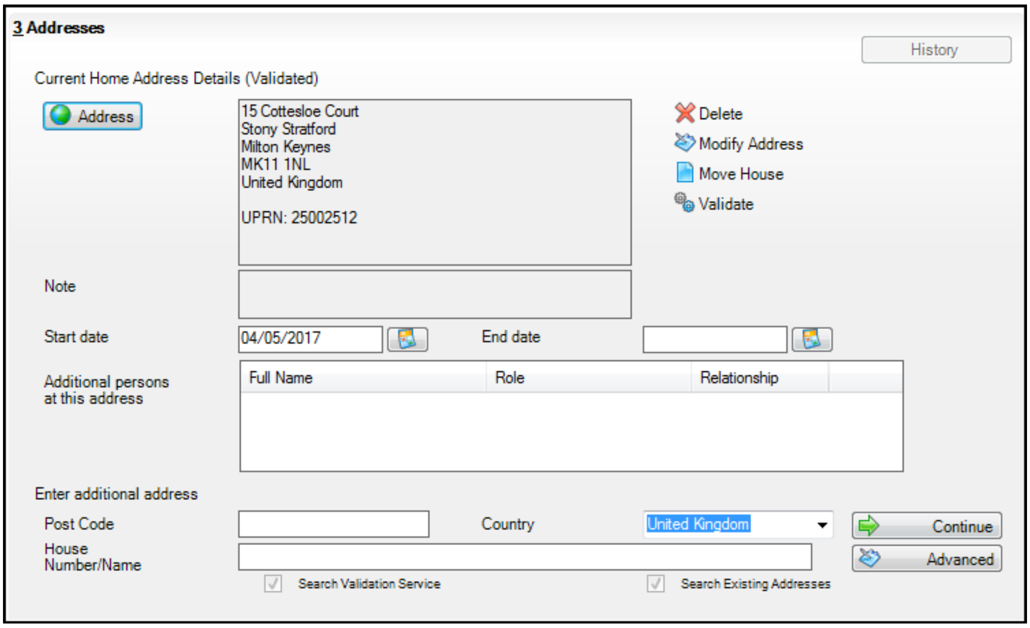
Adding/Editing a Contact's Telephone and Email Address Information

The process of recording and editing a contact's telephone and email address information is the same as that for the recording of a pupil/student's telephone and email address information, except that the information is entered via the **Telephones and Email Addresses** panel of the contact's **Add/Edit Contact for...** dialog.

This is accessed by clicking the **Family/Home** hyperlink in the required **Pupil (or Student) Details** page, and clicking the **New** button to add a new contact or the **Open** button to edit an existing one (please see *Recording Telephone Numbers and Email Addresses* on page *198*).

Adding/Editing a Contact's Address Information

1. After searching for an existing contact to ensure that their details have not already been added to SIMS, click the **New** button, or click the **Open** button to edit their existing details.
2. Click the **Addresses** hyperlink to display the **Addresses** panel.



3. By default, the **Home address can be disclosed** check box is selected. This indicates whether the contact's home address can be disclosed to ex-marital partners. Deselect this check box to prevent the address being disclosed.

> *NOTE: If the **Home address can be disclosed** check box is deselected, SIMS reports do not produce details of this address.*

4. By default, the **Home address can be transferred** check box is selected. Deselect this check box if there is concern about the validity of the address details and if so, they should not be transferred to other related individuals. When this check box is deselected, the contact's address information will not be transferred via CTF.
5. To amend any incorrect information in the current address, click the **Modify Address** button. Click the **Yes** button to continue. Make the applicable changes, then click the **Save** button in the top-left hand corner.
6. To enter a new or additional address, enter the **Post Code** and the **House Number/Name**, if applicable, in the **Enter** (**additional**) **address** section.

   The validation rules on the **Post Code** field enable the input of British Forces Post Office (BFPO) addresses. If a valid BFPO number is entered in BFPO 100 format, SIMS will not request that the **Country** field is completed.

   The **Post Code** field is checked against an external address database which is accessed across the Internet as a Web Service.

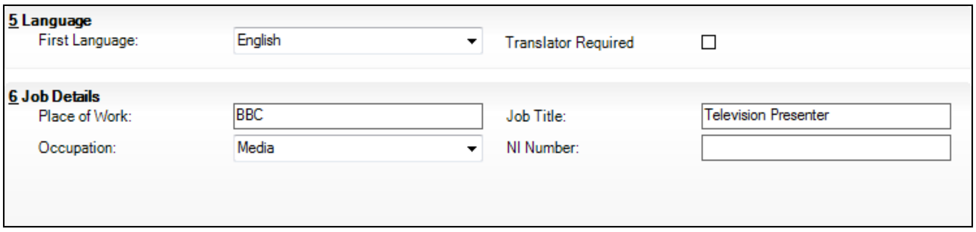
   Initially, the external database is managed and maintained by CCS. It contains Quick Address Systems (QAS) data. The **Advanced** button can be used if the post code is not known. This searches SIMS for existing address matches but does not access the external database.

   Existing addresses that already have a number of data fields completed but do not contain a post code, can be validated against the external database using the **Validate** button on completion of the **Post Code** field. Users opting to validate an address must bear in mind that this process replaces any incorrect address data that may already be held. The Address Validation Service functionality is available to schools that have obtained the licence key.

   Once an address has been validated, the **UPRN** (Unique Property Reference Number) is displayed in the **Current Home Address Details** field.
7. The **Country** field defaults to **United Kingdom** but can be altered via the drop-down list. This is a mandatory field. If the country is not specified, you will be unable to save the details, unless the **Post Code** field contains a BFPO number. Overseas addresses must be entered manually and are not subject to validation.
8. Click the **Continue** button to display the **Find Matching Addresses** dialog.
9. Double-click the relevant address. This returns you to the **Addresses** panel, where the address fields are populated with the details selected. Alternatively, click the **New** button in the **Find Matching Addresses** dialog to create a new address.
10. Clicking the **Address** button in the top left-hand corner of the **Addresses** panel launches the selected mapping website link, specified through the **User Options** screen.

Adding/Editing a Contact's Language and Job Details

1. Select **Focus** | **Person** | **Contacts** to display the **Contacts** page.
2. After searching for an existing contact, click the **Language** hyperlink to display the **Language** panel.



3. Select the contact's **First Language** from the drop-down list and if a language barrier exists, select the **Translator Required** check box.
4. In the **Job Details** panel, enter the contact's **Place of Work**.
5. Select their **Occupation** from the drop-down list and enter their **Job Title**.
6. Enter the contact's **NI Number**, if known.
7. Click the **Save** button to save the details.

Adding Notes/Documents to a Contact

Notes and documents can be added to provide additional information about a pupil/student's contacts. The process is the same as in several areas of SIMS, with the exception that for contacts they are added via the **Documents** hyperlink in the **Contacts** pane of the **Family/Home** panel.

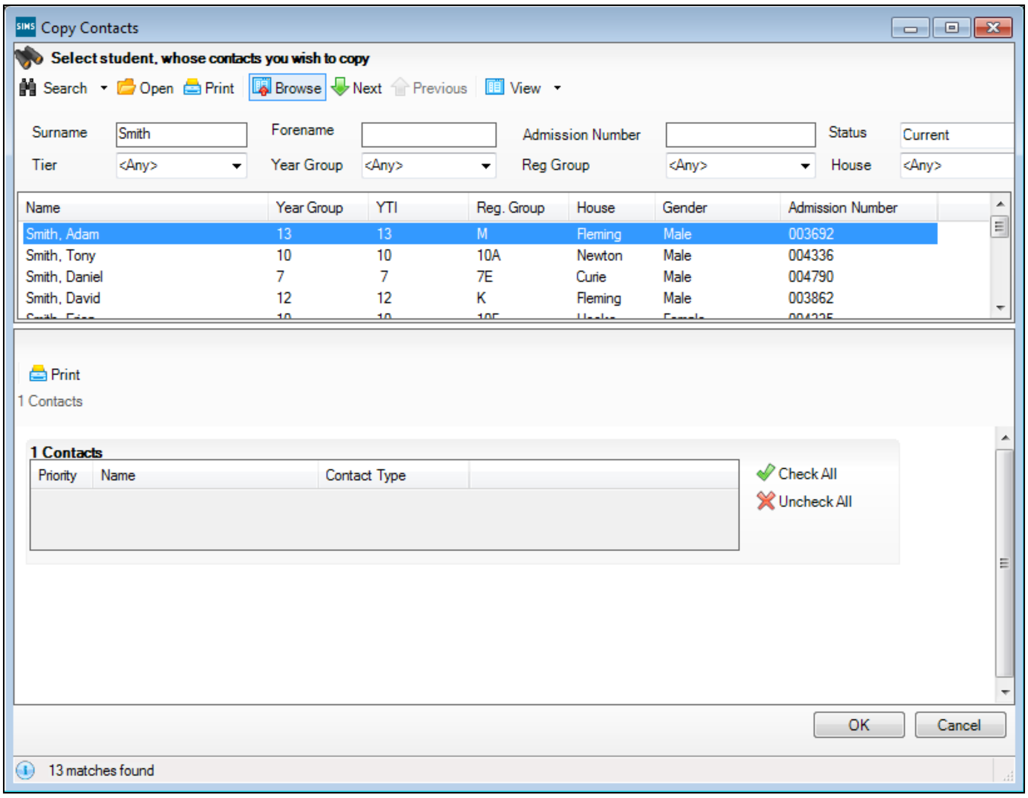
More Information:
Attaching a New Note/Document on page *147*

Copying Contacts

It is possible to copy contact information already recorded in SIMS from one pupil/student to another. This is particularly beneficial when another child with siblings already in your school, also joins the school. Instead of re-entering the same information for the new pupil/student, you can quickly copy the information that is already recorded against their sibling to the new family member.

1. Click the **Family/Home** hyperlink to display the **Family/Home** panel.
2. Click the **Copy** button adjacent to the **Contacts** panel to display the **Copy Contacts** dialog.

3. After searching for the pupil/student whose contacts you wish to copy, double-click their name to view their existing **Contacts** in the dialog.



The contacts required for copying to the new pupil/student can be selected individually by selecting the check boxes next to their names, or they can be selected or de-selected collectively using the **Check All** or **Uncheck All** buttons.

4. When you have made your selection from the contacts listed, click the **OK** button to populate the new pupil/student's **Contacts** panel with the copied contacts.

Cloning Contacts

It is also possible to clone contacts from an existing pupil/student to a new pupil/student, as well as copying them from one sibling to another.

1. Click the **Family/Home** hyperlink to display the **Contacts** panel.
2. Highlight an existing contact from the list displayed and click the **Clone** button adjacent to the **Contacts** panel to display the **Contact Details** dialog.
3. All individuals who have already been entered into SIMS and who are close matches to the existing contact selected are displayed in the **Matched People** panel. Follow the on-screen instructions to proceed with adding or editing a contact.
4. If the exact contact you want to clone is displayed in the **Matched People** panel and needs no amendments, highlight their name and click the **Open** button.

The **Contact Details** dialog is displayed with the name of the selected **Contact** already populated.

If you have inadvertently selected the wrong contact from the list displayed, you can return to the **Matched People** panel by clicking the **Cancel** button.

5. Select the **Contact Type** from the drop-down list, e.g. childminder, neighbour, etc.
6. If the contact will be receiving **Correspondence** relating to the pupil/student, select the check box.
7. If the contact has **Parental Responsibility** for the child and receives the school **Pupil Report**, select the respective check boxes.
8. If there is a **Court Order** in place restricting this contact's access to the child, select the check box.
9. Enter the **Priority** for this contact. Parents and legal guardians are normally allocated the highest priority of 1. The lower the number allocated, the quicker the contact will be informed in the case of an emergency involving the pupil/student, e.g. the contact allocated the number 1 is considered to be the first port of call in the event of an emergency. Contacts who have been allocated numbers greater than 3 may not be notified at all.
10. Click the **OK** button to save the details.

Adding/Editing Parental Salutation and Addressee Information

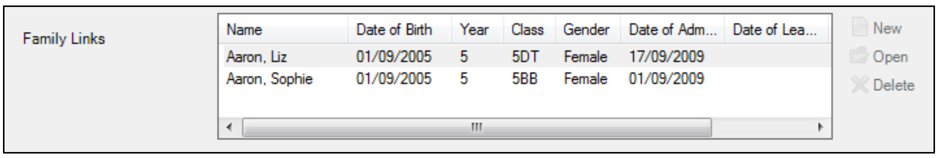
The information stored in the **Parental Salutation** and **Parental Addressee** fields are automatically incorporated into any Quick Letters that are sent to the pupil/student's parents/guardians via the **Links** drop-down list.

1. Click the **Family/Home** hyperlink to display the **Contacts** panel.
2. Enter the **Parental Salutation** and **Parental Addressee** for the student's main contact(s).

   To automatically create data in the **Parental Salutation** and **Parental Addressee** fields, click the relevant **Generate** button. Any information currently displayed in these fields is overwritten with data deemed to be accurate by the system.

Generate Button

3. Indicate whether the pupil/student should be used as the **Mailing Point** for all other related siblings in the school by selecting the check box.
4. The **Family Links** panel at the bottom of the **Family/Home** panel displays a list of any existing siblings who share contacts with the same parental responsibility as the pupil/student you are viewing. For example, there may be three pupil/students of varying ages from one family who already attend the school. This facility is read-only and the details are updated automatically by SIMS whenever changes are made to these related pupil/students.



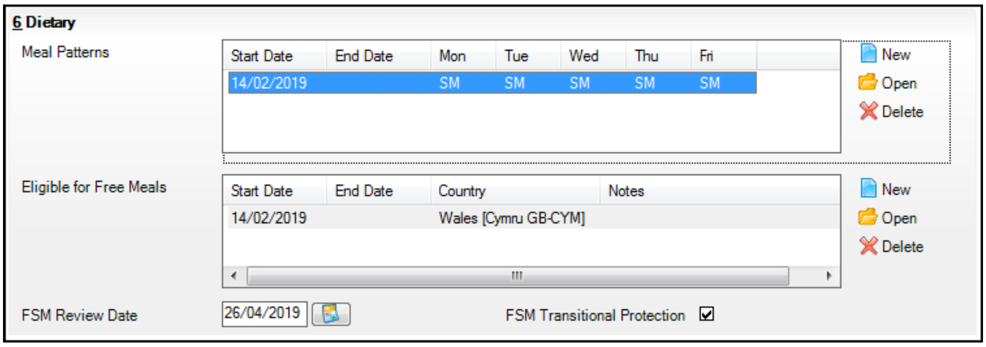
Name	Date of Birth	Year	Class	Gender	Date of Adm...	Date of Lea...
Aaron, Liz	01/09/2005	5	5DT	Female	17/09/2009	
Aaron, Sophie	01/09/2005	5	5BB	Female	01/09/2009	

5. Click the **Save** button to save the details.

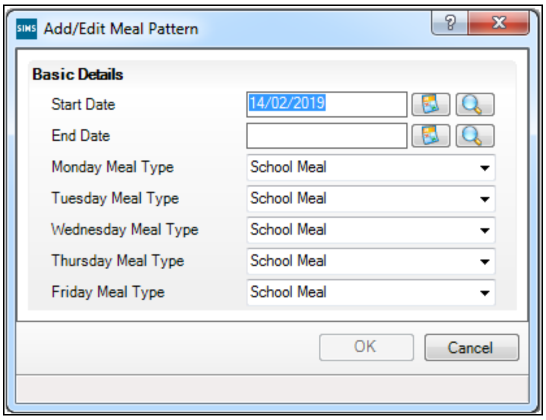
Adding/Editing Dietary Information

The **Dietary** panel enables you to add or edit a pupil/student's meal pattern, their dietary preferences and their eligibility for free school meals.

1. On the appropriate **Pupil** (or **Student**) **Details** page, click the **Dietary** hyperlink to display the **Dietary** panel.



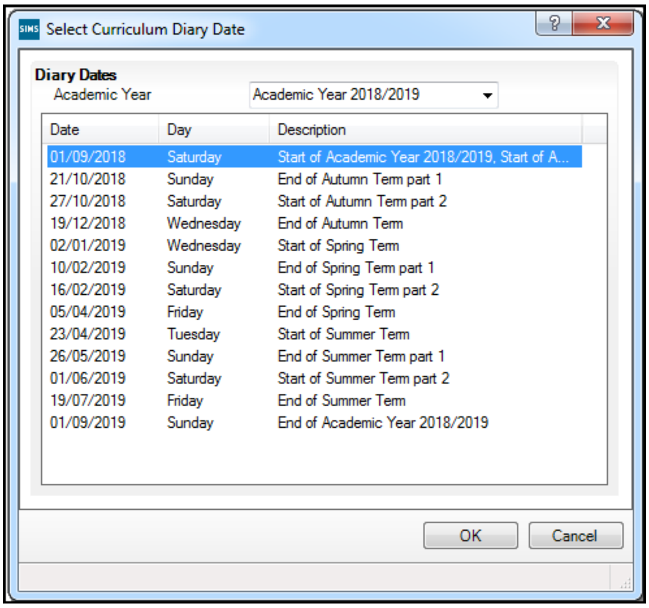
2. To add a new meal pattern, click the **New** button adjacent to the **Meal Patterns** table. Alternatively, highlight an existing pattern and click the **Open** button to display the **Add/Edit Meal Pattern** dialog.



3. There are three ways of entering the **Start Date** and **End Date**:

> *NOTE: The **Start Date** can only be today's date or a date in the future. The **End Date** can be left open.*

- Enter the date manually.
- Click the **Calendar** button and select the required date.
- Click the **Search** button and select the appropriate **Diary Date** from the **Select Curriculum Diary Date** dialog.



Different **Academic Years** can be selected from the drop-down list. Highlight the appropriate date and click the **OK** button to return to the **Add/Edit Meal Pattern** dialog.

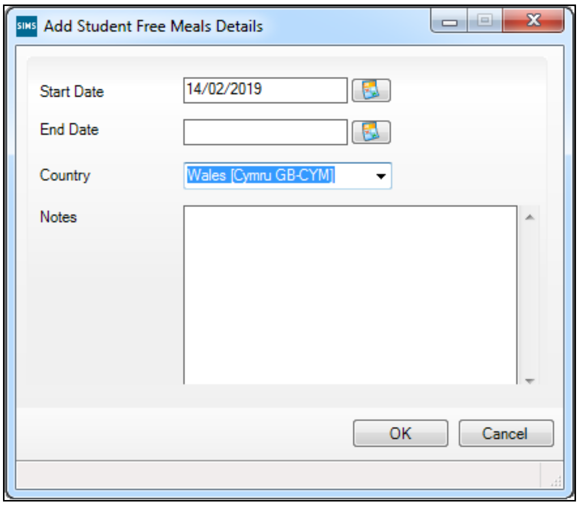
4. For each day of the week, select the **Meal Type** from the adjacent drop-down list.
5. Click the **OK** button to close the dialog and return to the **Pupil** (or **Student**) **Details** page.
6. Click the **Save** button to save the changes.

Adding/Editing Free Meal Eligibility

If a pupil/student has free school meals, this must be recorded in the **Eligible for Free Meals** section of the **Dietary** panel within a pupil/students record, for the purposes of the School Census. It is possible for a pupil/student to be eligible for free school meals, but they might choose to bring sandwiches or to go home for lunch. Periods of eligibility are displayed in start date order, with the most recent displayed at the top of the table.

When recording free school meal eligibility, you must enter a **Start Date** as a minimum. The **Meal Type** and **End Date** need only be entered if known. It is however, advisable to enter an **End Date** so that you know when the eligibility runs out. It is then possible to set up a reminder to give you advance notice of when the eligibility will expire and to record the **FSM Review Date**.

1. On the **Dietary** panel, click the **New** button adjacent to the **Eligible for Free Meals** panel to display the **Add Student Free Meal Details** dialog. Alternatively, highlight an existing entry and click the **Open** button to display the **Edit Student Free Meals Details** dialog.



2. Enter the **Start Date** (mandatory) and **End Date** (if available) for the free meal period as supplied by your Local Authority.
3. The **Country** defaults according to the location of the school but can be changed by selecting an alternative option from the drop-down list.

   A country must be specified for periods of eligibility that are open as of 01/09/2012, and for all periods that start thereafter.

> *NOTE: The* ***Country*** *field has been introduced for CTF 12, the 2013 School Census, PRU Census and AP Census collections, to ensure that schools receive the correct Pupil Premium entitlements. The Pupil Premium is applicable only to schools in England so periods of FSM eligibility in any other country do not count when determining a pupil's eligibility for the Pupil Premium.*

4. Enter any **Notes** relating to the free school meal eligibility.
5. Click the **OK** button to add the free school meal eligibility.
6. Enter the **FSM Review Date**, if required, or click the **Calendar** button then select the required date.
7. Schools in Wales must select the **FSM Transitional Protection** check box if the pupil/student's period of Free School Meal eligibility is protected during the implementation of Universal Credit. This check box must be selected by 1 April 2019 to ensure that payment for lunches is collected only for pupil/students who are not currently eligible for a Free School Meal and who do not have transitional protection.

Adding/Editing Free School Milk Eligibility (Welsh Primary Schools)

The ability for Welsh Primary schools to record individual student's **Eligibility for Free School Milk** has been provided as a requirement of the NAW. Any existing Free School Milk Eligibility details are displayed.

1. On the **Dietary** panel, highlight an existing entry and click the **Open** button to edit the details or click the **New** button to display the **Add/Edit Free School Milk Details** dialog.
2. Enter the **Start Date** and **End Date** (if available) for the free school milk period.
3. Click the **OK** button to add the free school milk eligibility.

Adding/Editing Medical Information

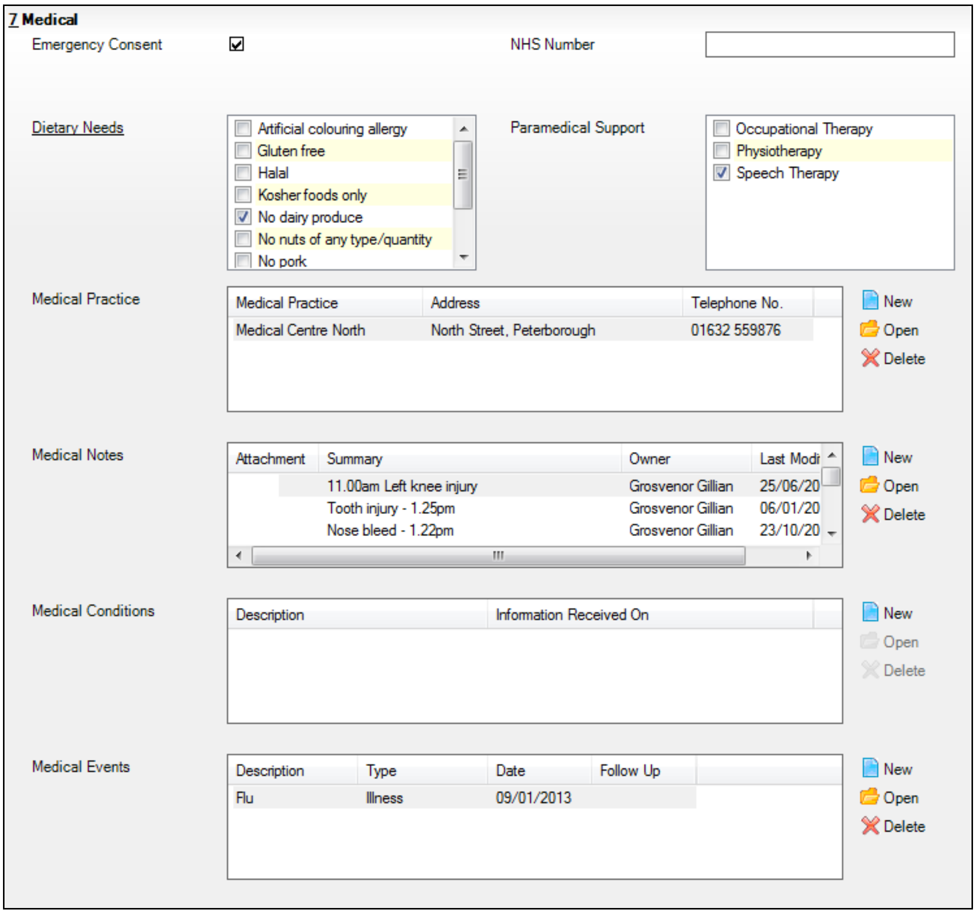
> *NOTE: You need to be a member of any of the following user groups in System Manager to record/edit medical information:*
>
> *Administration Assistant, Admissions Officer, Pastoral Manager (not Dietary Needs), Returns Manager, Returns Operator (cannot add Dietary Needs), School Administrator, SEN Coordinator.*
>
> *Please see your System Administrator/Manager if you are not sure whether you have the required Permissions.*

This section describes how to add medical information to a pupil/student record including medical notes, conditions and events. This enables a record to be kept of any known conditions/ailments, medical practice contact details and any prescribed medication or past immunisations.

Many of the values that can be selected from the various drop-down lists can be edited by changing either the Medical Conditions or Medical Event Type lookups (via **Tools | Lookups | Maintain**). This allows you to amend the values to those more commonly occurring in your school. For more information, please refer to the *Importing and Maintaining Lookups* section of the *Setting Up and Administering SIMS* handbook.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

2. Click the **Medical** hyperlink to display the **Medical** panel.

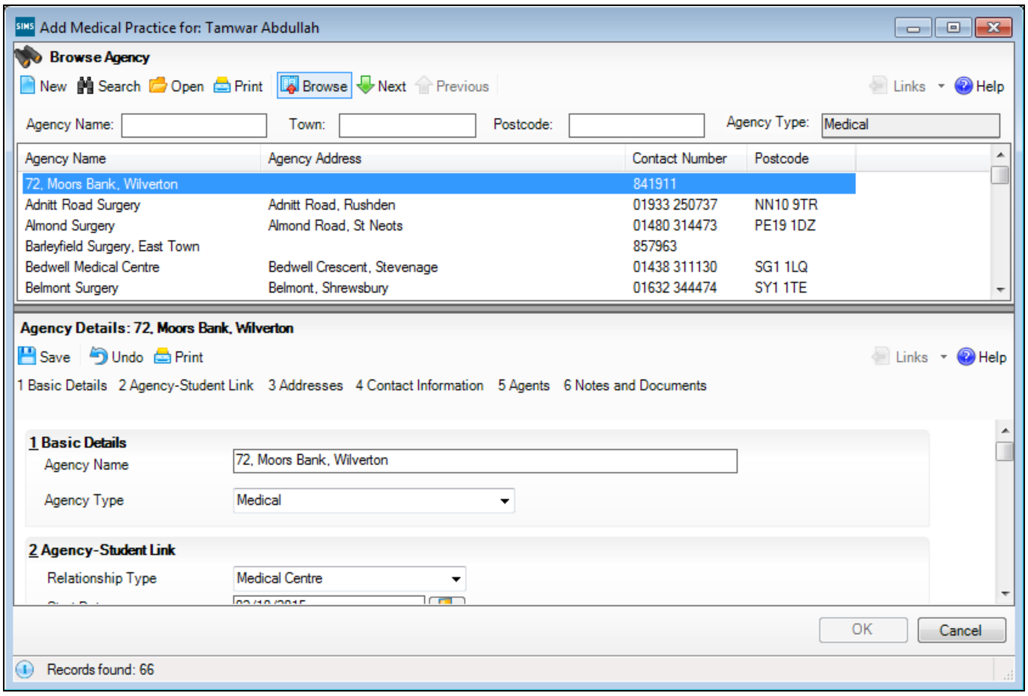


Recording Medical Information

1. Select the **Emergency Consent** check box if the school has obtained consent to act in the event of an emergency.
2. Enter the child's **NHS Number** if known.
3. Specify and **Dietary Needs** by selecting the appropriate check boxes in the scrollable list, e.g. `Gluten Free`.
4. If the pupil/student is female and in Year 8 or above, a **Pregnant Pupil** indicator is available for selection. Select this check box if the pupil/student is pregnant.
5. Specify whether the pupil/student receives **Paramedical Support** by selecting the appropriate check box from the options available, e.g. `Speech Therapy`.
6. Schools in Northern Ireland can select whether the **Student has been Assessed Disabled** by selecting the check box.

Associating a Medical Practice with a Pupil/Student

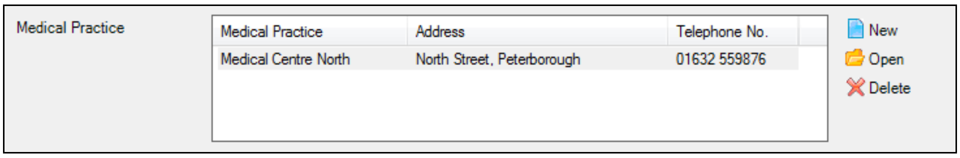
1. Click the **New** button adjacent to the **Medical Practice** panel to display the **Add Medical Practice for** dialog.



2. Search for the required Medical Practice then double-click to display them in the **Agency Details** page.

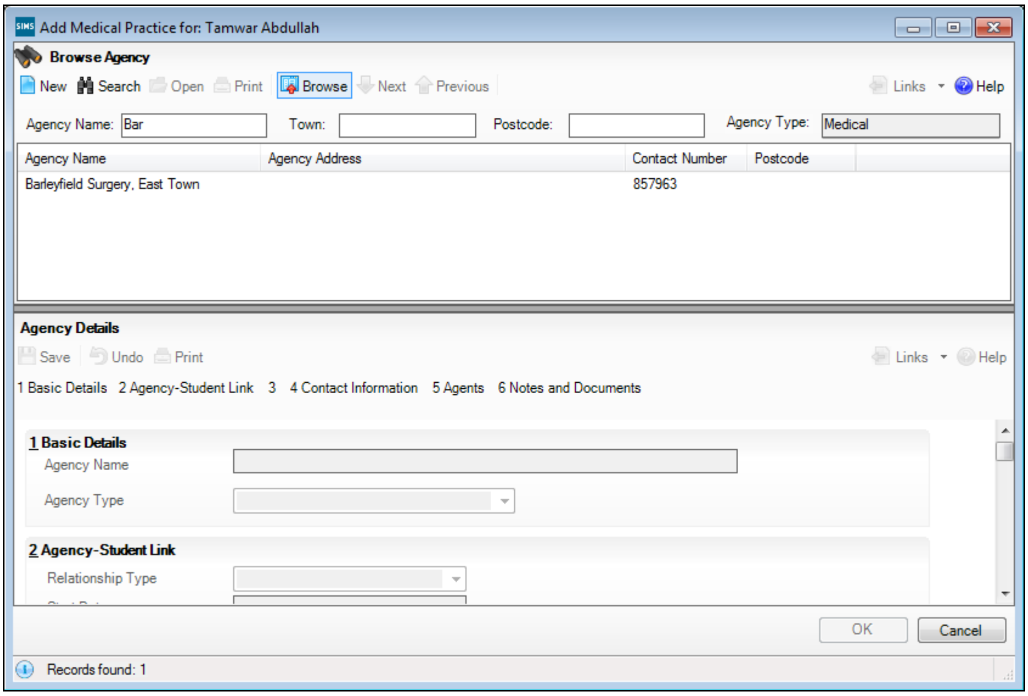
> *NOTE: If the required medical practice does not exist, they need to be added by clicking the **New** button (please see* Recording a Medical Practice *on page* 216*).*

3. Click the **Save** button to save the association then click the **OK** button. The selected Medical Practice is displayed in the **Medical Practice** panel.



Recording a Medical Practice

1. Click the **New** button adjacent to the **Medical Practice** panel to display the **Add Medical Practice for:** dialog.



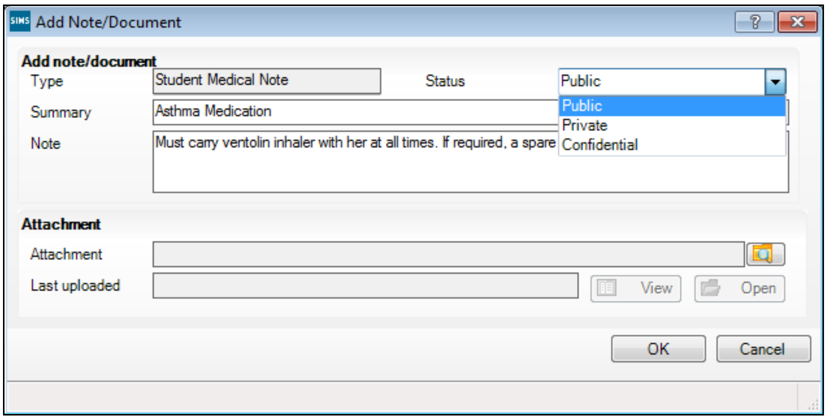
2. Check that the medical practice does not already exist by entering the required search parameters in the **Agency** browser and clicking the **Search** button. If the medical practice does not already exist, proceed to step *4* in *Adding an Agency* (please see Adding an Agency on page *233*).
3. Once the required medical practice has been selected or added, click the **Save** button then the **OK** button to add them to the selected pupil/student record.

Recording Medical Notes

Medical notes are used to add/display any additional medical information to the pupil/student record. They can be added directly in the **Medical Note** panel, or they can be notes attached to a **Medical Condition** or a **Medical Event**. You may for example, wish to add information about medication required for a specific medical condition or about an exercise that should not be undertaken, e.g. `Should not go swimming`.

> *NOTE: Medical notes attached to medical events or conditions appear in the **Medical Note** panel once the record has been saved.*

1. Click the **New** button adjacent to the **Medical Notes** panel to display the **Add Note/Document** dialog.



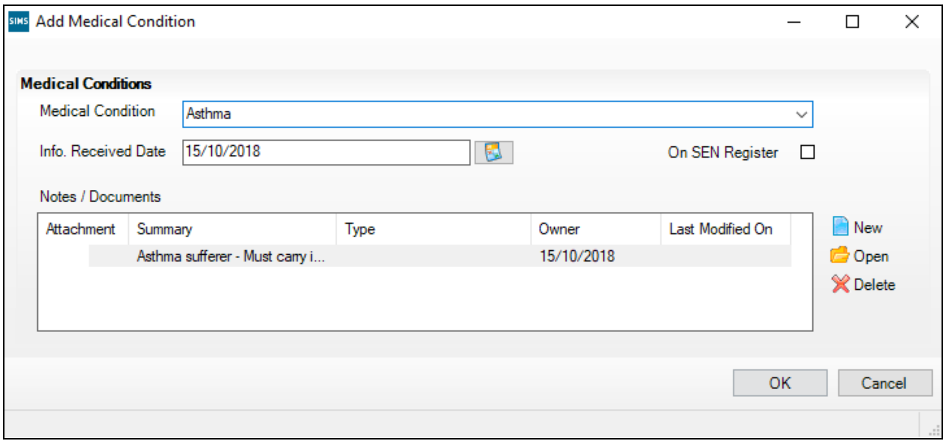
The Type field defaults to **Pupil** (or **Student**) **Medical Note**.

2. Attach the document (please see *Attaching a New Note/Document* on page *147*).

Adding/Editing Medical Conditions

This section should be used to record information on any known medical condition, such as asthma, epilepsy, etc.

1. Click the **New** button adjacent to the **Medical Conditions** panel to display the **Add Medical Condition** dialog.
2. Select the required **Medical Condition** from the drop-down list, e.g. `Asthma`.



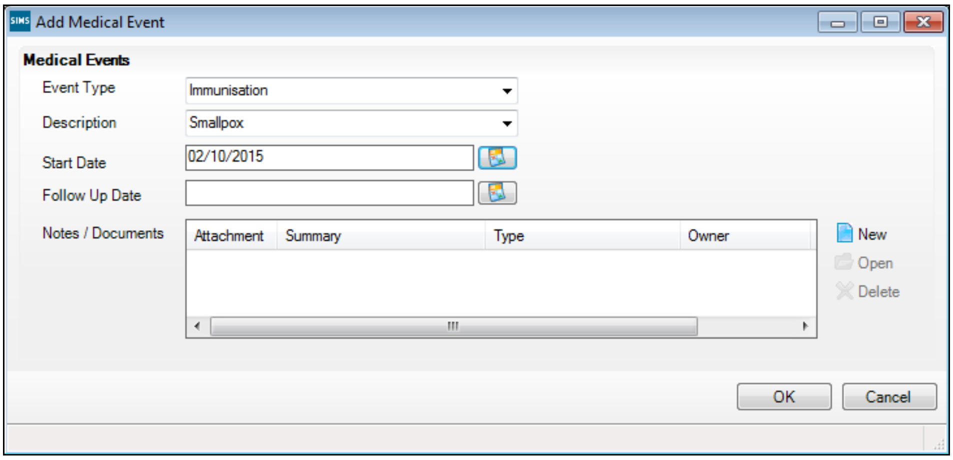
3. Select the **Info. Received Date** from the Calendar, if required.
4. If there is a linked SEN record, select the **On SEN Register** check box.
5. If required, you can add further detail by adding a medical note to the condition such as information on medication relating to the condition (as shown in the previous graphic). To add a medical note to a medical condition, click the **New** button adjacent to the **Notes/Documents** panel to display the **Add Note/Document** dialog. Follow the instructions for adding a medical note (please see *Attaching a New Note/Document* on page *147*).

6. Click the **OK** button to save the medical condition.

Adding/Editing Medical Events

The **Medical Events** panel is used to record medical events such as immunisations, accidents, illnesses suffered, etc. Recording medical events can be used as an alternative to manually recording such events in accident books, etc.

1. Click the **New** button adjacent to the **Medical Events** panel to display the **Add Medical Event** dialog.



2. Select the Event Type from the drop-down such as Immunisation, Accident, Illness or Medical Inspection.
3. Select an appropriate **Description** that relates to the **Event Type** as required.

> *NOTE: The options in the **Description** drop-down list change according to the **Event Type** selected.*

4. Enter the **Start Date** of the event or click the **Calendar** button and select the required date.
5. Enter any **Follow Up Date** if for example, a booster is required.
6. If required, you can add further detail by adding a medical note to the event. To add a medical note to a medical event, click the **New** button adjacent to the **Notes/Documents** panel to display the **Add Note/Document** dialog. Follow the instructions for adding a medical note *(please see Attaching a New Note/Document on page* 147*).*
7. Click the **OK** button to add the medical event.

Adding/Editing Ethnic/Cultural Information

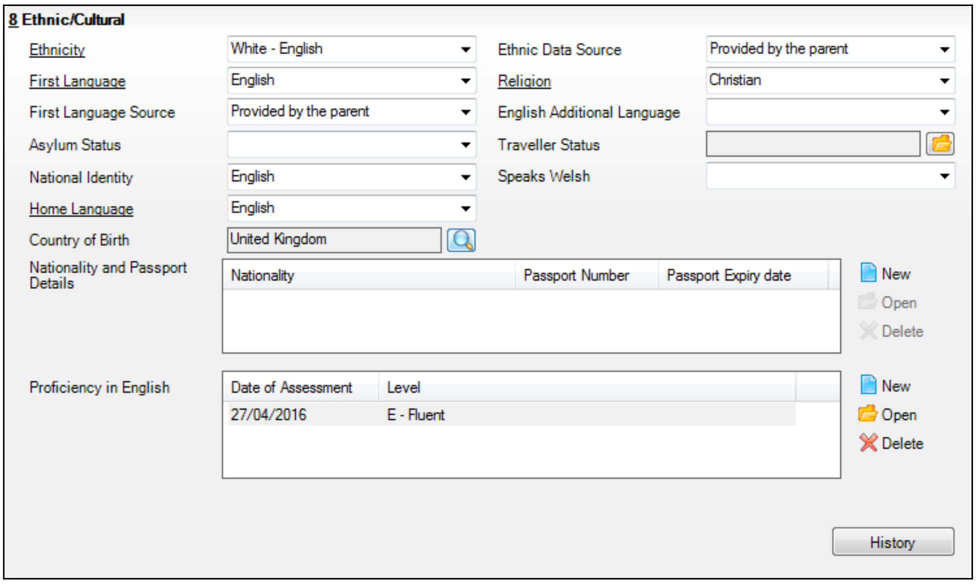
The **Ethnic/Cultural** panel is used to record ethnic/cultural information such as ethnicity, home language, traveller status. Some fields must be recorded to prevent validation errors when producing statutory returns such as the School Census.

NOTES: Welsh and Northern Ireland schools see some additional fields which are described in the applicable sections.

*The **Home Language** is no longer collected by the School Census and the field can be disabled throughout SIMS by selecting the **Hide Home Language** check box in **Tools | Setups | School Options**.*

Many of the values that can be selected from the various drop-down lists can be edited by changing the applicable lookups (via **Tools | Lookups | Maintain**). For example, some faith schools may wish to change the values in the **Home Religion** lookup to reflect their religions and map them to the appropriate DfE. Please consult with your Local Authority before making any changes.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil (or Student) | Pupil (or Student) Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.



3. Select the **Ethnicity** and the **Ethnic Data Source** (the person who determined the ethnicity) from the drop-down lists as required.

> *NOTES: All pupil/students aged 5 and over should have an ethnic category assigned to them. If the information has not yet been collected, select **Information Not Yet Obtained** from the drop-down list. If the parent has refused to give this information, select **Refused** from the drop-down list.*
>
> *Northern Ireland schools only - If the pupil/student has an ethnicity recorded of **Irish Traveller** then it is advisable to record the appropriate accommodation type.*

4. Select their **Home Language** (if enabled), **First Language**, **National Identity** and **Religion** from the respective drop-down lists.

> ***IMPORTANT NOTE:** When creating an application for a prospective student that is linked to an agency, or contact (e.g. parent) (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the recorded religion is transferred automatically from the agency's record to application's record.*

5. If the pupil/student’s first language is not English, select **Yes** from the **English Additional Language** drop-down list.
6. If the pupil/student is an asylum seeker or refugee, select the appropriate value from the **Asylum Status** drop-down list, e.g. `Refugee`.

> *NOTE: An **Asylum Status** of **Refugee** should only be selected when their application for asylum has been accepted by the Home Office. Asylum Seekers are pupil/students who have lodged a claim for asylum and are waiting for a decision to be made.*

7. English and Welsh schools can select a pupil/student's country of birth. Click the **Browser** button adjacent to the **Country of Birth** field, then select the required country. Click the **OK** button.

   Welsh schools see additional data fields in the **Ethnic/Cultural** panel:

   Specify whether the child speaks **Welsh at Home**, **Speaks Welsh with Parents**, is **Taught Welsh at School**, is of a **Welsh Data Source** or **Speaks Welsh with Siblings**, by selecting from the relevant drop-down lists. If the pupil/student is **Taught Lessons Other Than Welsh Through the Welsh Medium**, select the check box.

   Schools in Wales <u>must</u> record details of any new pupil/students who have entered the education system since February 2002, who were not previously educated in an English or Welsh based education system. The acronym for this data field is NEWBES (Non English/Welsh Based Education System).

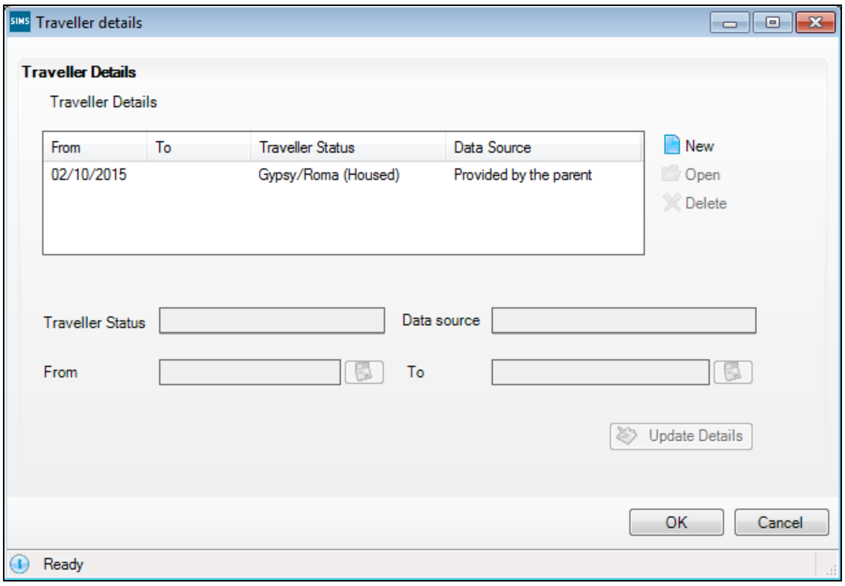
- If a new pupil/student conforms to this ruling, select the **Previously educated in a NEWBES** check box.
- Specify the **Date of Entry (NEWBES)** by clicking the **Calendar** button and selecting the date. This represents the date that the new pupil/student entered the country.

  Northern Ireland schools see additional data fields in the **Ethnic/Cultural** panel:
- If the pupil/student spends **Time Taught Through Irish Medium**, select the check box to indicate this.

Recording Traveller Status

The DfE and NAW require schools to report the numbers of traveller pupil/students that are on-roll and whether they are living in houses, travelling from place to place, etc. SIMS enables you to record a history of travelling children's locations. The Department of Education for Northern Ireland also request similar data to be collected.

1. Click the **Open** button adjacent to the **Traveller Status** to display the **Traveller details** dialog. Any existing traveller details are displayed.



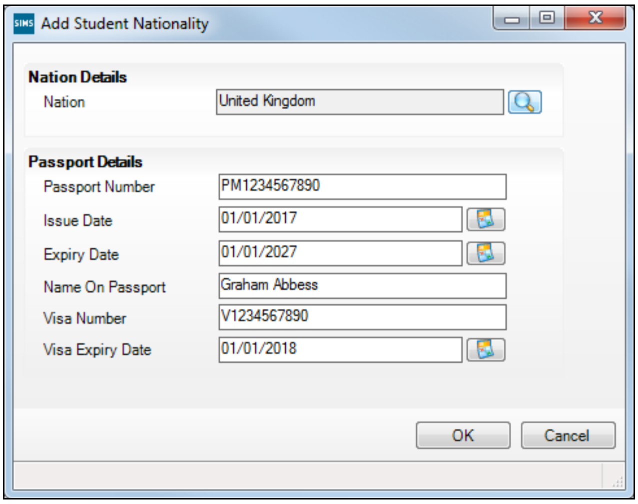
> *NOTE: Schools in Northern Ireland see **Accommodation Type** in place of **Traveller Status**.*

2. Double click any existing traveller details to edit them or click the **New** button to activate the applicable fields.
3. Select the relevant **Traveller Status** (mandatory) from the drop-down list. Schools in Northern Ireland should select an **Accommodation Type** from the drop-down list.
4. Select the **Data source** from the drop-down list. This indicates where the information was obtained from, e.g. **Parent**.
5. Specify the period **From** and **To** by clicking the respective **Calendar** buttons and selecting the date. The **From** date is mandatory although it may not be possible to complete the **To** date, at this stage.

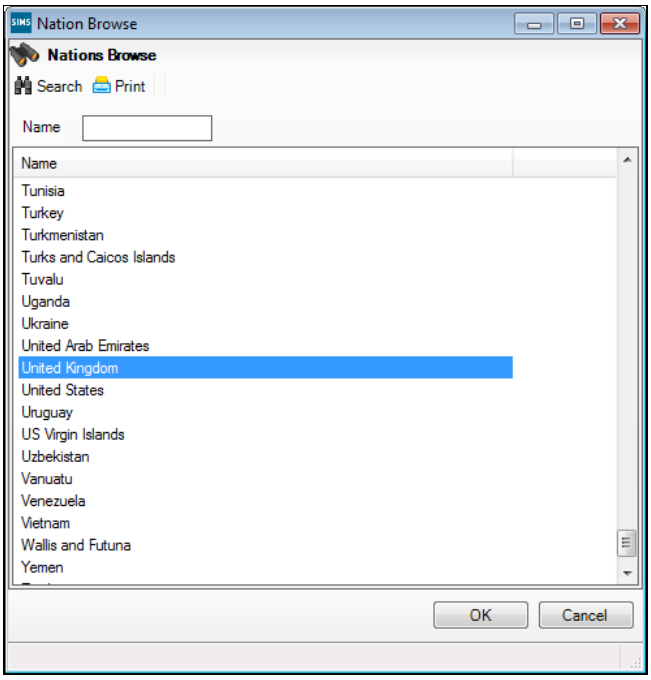
6. Click the **Update Details** button to save the information.
7. Click the **OK** button to close the dialog. The selected status is displayed in the **Traveller Status** field on the **Ethnic/Cultural** panel.

Recording Nationality and Passport Details

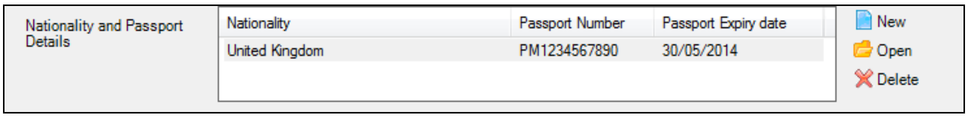
1. Add new nationality and passport details by clicking the **New** button adjacent to the **Nationality and Passport Details** panel. Alternatively, select an existing item from the list and click the **Open** button.



2. From the **Add Pupil/Student Nationality** dialog, click the **Browse** button adjacent to the **Nation** field to display the **Nation** browser.



3. To facilitate selection, **United Kingdom** is highlighted automatically. To select a different nationality, enter the first few initials of the nation, highlight the required nation then click the **OK** button to populate the **Nation** field.
4. Enter the **Passport Number**, **Name On Passport** and **Visa Number**, and enter dates in the **Issue Date**, **Expiry Date** and/or **Visa Expiry Date** fields as required.
5. Click the **OK** button. The **Nationality**, **Passport Number** and **Passport Expiry date** are displayed in the **Nationality and Passport Details** panel.

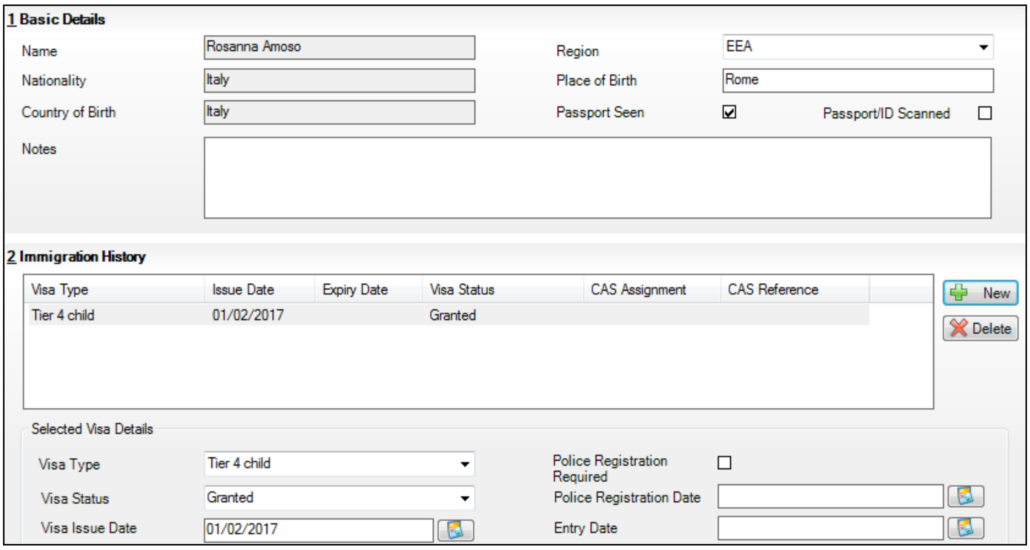


6. Click the **Save** button to save the ethnic/cultural information.

Recording Tier 4 Information

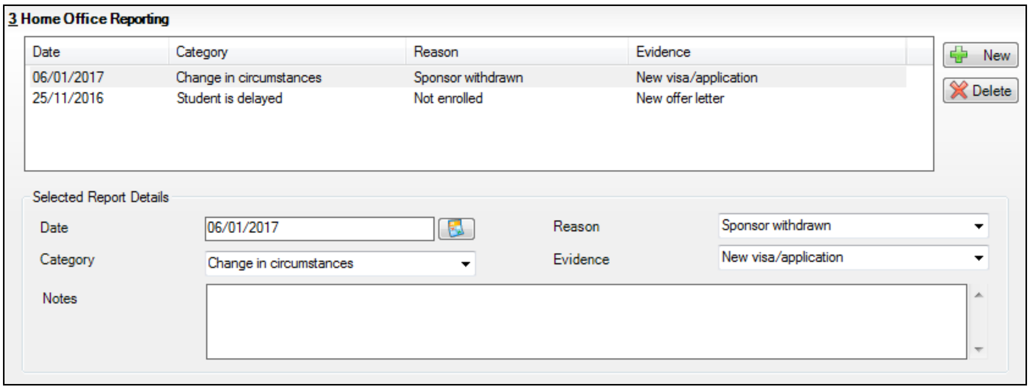
If a school records Tier 4, they are able to view and maintain Tier 4 information for their pupil/students and applicants.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. After searching for a pupil/student's details, highlight their name from the list displayed and double-click to view their entire **Pupil** (or **Student**) **Details** page.
3. Click the **Tier 4 Details** link in the **Links** panel on the right-hand side of the page to display the **Tier 4 Details** page.



4. The pupil/student's **Name**, **Nationality** and **Country of Birth** are populated automatically and cannot be amended.
5. Select the **Region** of the country of birth (e.g. **EEA** for Italy or **International** for China) from the drop-down list and enter the **Place of Birth**.

6. If applicable, select the **Passport Seen** and **Passport/ID Scanned** check boxes and enter any **Notes**.
7. In the **Immigration History** panel, click the **New** button to create a new Visa record. Alternatively, select an existing record to view its details in the **Selected Visa Details** and **Selected CAS Details** panels. Click the **Delete** button to delete a record.
8. Enter the **Visa Type** (mandatory) and any other Visa and CAS information in the relevant fields. Select the **Police Registration Required** and **BRP/Visa Seen** check boxes, if applicable.
9. Schools are required to report any changes in the situation of a Tier 4 pupil/student (e.g. a Visa change or a new course) to the Home Office. These changes can be recorded in the **Home Office Reporting** panel. Click the **New** button to create a new report. Alternatively, select a report to view or edit its details in the **Selected Report Details** panel. A report can be deleted by highlighting it and clicking the **Delete** button.

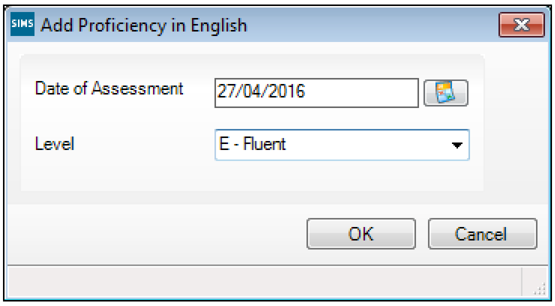


10. Select the **Date** of the change from the Calendar.
11. Select the type of change in situation from the **Category** drop-down list (e.g. **Change in circumstances**) and the **Reason** for the change (e.g. **Student withdrawn**).
12. Select any **Evidence** of the changes (e.g. **New offer letter**) and enter any relevant **Notes**.
13. Click the **Save** button.

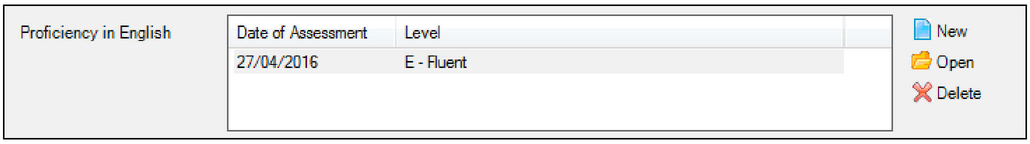
Recording Proficiency in English Information

For School Census purposes, Maintained schools in England can record pupil/students' proficiency in English.

1. Click the **New** button in the **Proficiency in English** panel. Alternatively, highlight an existing record and click the **Open** button.



2. The **Date of Assessment** field defaults to today's date but can be edited by selecting from the Calendar.
3. Select the pupil/student's **Level** from the drop-down list, based on the following gradings:
   - **A - New to English**
   - **B - Early acquisition**
   - **C - Developing Competence**
   - **D - Competent**
   - **E - Fluent**
   - **N - Not yet assessed**.
4. Click the **OK** button. The **Date of Assessment** and **Level** are now displayed in the **Proficiency in English** panel.



5. Click the **Save** button to save the ethnic/cultural information.

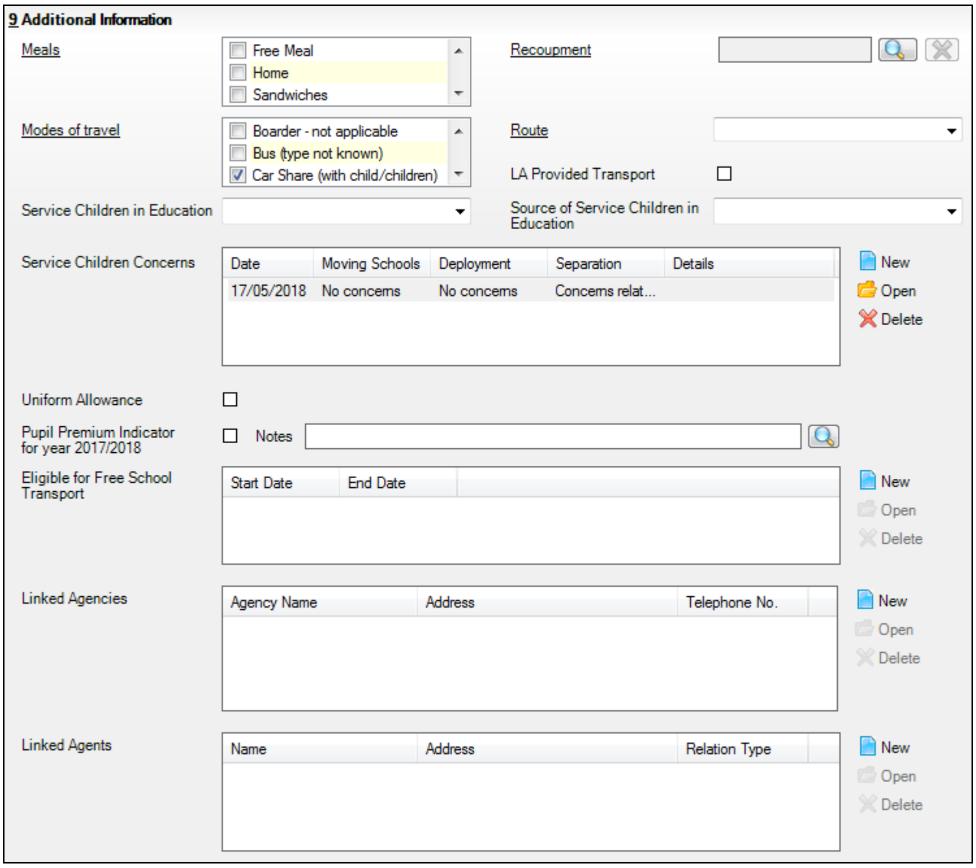
Adding/Editing Additional Information

The **Additional Information** panel is used to record information on Pupil Premium eligibility, modes of transport, Connexions Assent (Secondary schools only), etc.

Many of the values that can be selected from the various drop-down lists can be edited by changing, for example, the **Route** lookups (via **Tools | Lookups | Maintain**). This allows you to amend the values to those more commonly used in your school. It is advisable to contact your Local Authority before editing any of these values.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

2. Click the **Additional Information** hyperlink to display the **Additional Information** panel.



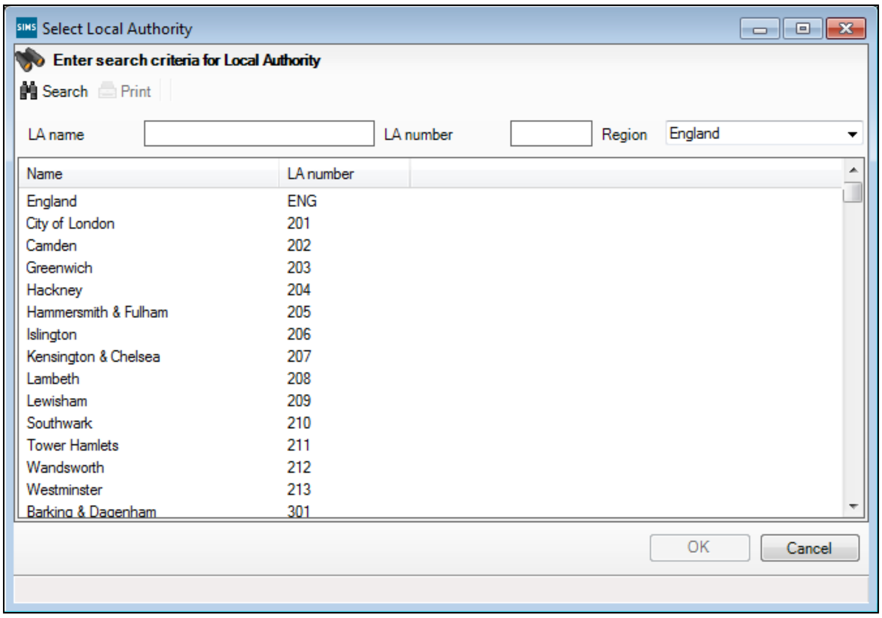
Recording Meal Information

Identify the most frequent meal type that the pupil/student has by selecting the relevant check box from the **Meals** options available.

The **Meals** section will be removed in a future release, because the meal information is now entered via the **Dietary** panel (please see *Adding/Editing Dietary Information* on page *210*).

Recording Recoupment Information

1. If the pupil/student lives in a different Local Authority, the school is entitled to claim the cost of education directly from that Local Authority. If this is the case, click the **Browser** button adjacent to the **Recoupment** field to display the **Select Local Authority** dialog.



2. Enter the **LA name** and/or **LA number** and click the **Search** button or leave the fields blank to list all available authorities.
3. Highlight the required LA then click the **OK** button to select them.

Recording Connexions Assent Information (Secondary schools only)

Select the applicable **Youth Support Services Agreement** status from the drop-down list.

Recording Travel Information

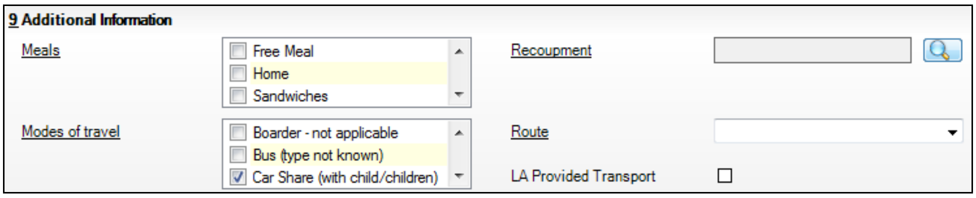
This section allows you to record information on the way in which pupil/students travel to school and may need to be regularly updated.

The DfE and Department for Transport have a joint 'Travelling to School' initiative, which sets out a programme of activity for schools, LAs and Central Government to increase walking, cycling and the use of public transport and to reduce car use for journeys to and from school.

If you have an approved Travel Plan as part of this DfE initiative, then you are required to provide pupil/students' usual mode of travel for the School Census. Schools not taking part in the DfE initiative do not need to return travel information at this time, although if it has been recorded, it will be included in the School Census return. All English schools will be required to have a Travel Plan and provide the relevant information by 2010.

Where a pupil/student uses more than one mode of travel for each journey to school, the longest element of the journey by *distance* should be recorded. For example, a pupil/student who travels five miles by car and then walks the last mile to school, should be recorded as Car/Van. Car Share covers both informal and formal car share arrangements.

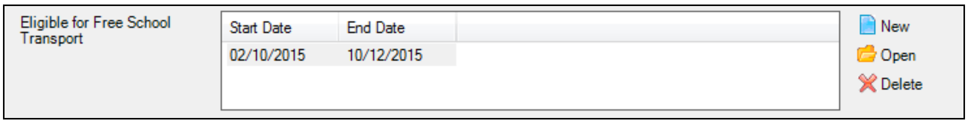
It is recommended that information is collected from pupil/students (or parents) in the Autumn as this will limit the burden for English schools at School Census time, perhaps by including the item on Data Checking sheets.



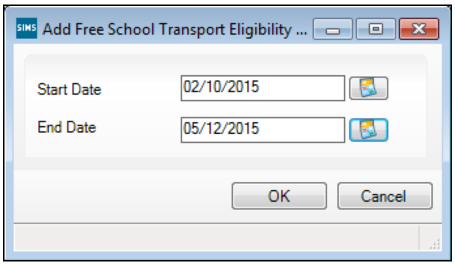
1. Identify the most frequent **Modes of travel** by selecting the relevant check box (only one check box can be selected).
2. Select the required **Route** from the drop-down list. Additional routes can be added via **Tools | Maintain Lookups**.
3. If the transport is provided by the Local Authority, select the **LA Provided Transport** check box.

Adding/Editing Eligibility for Free School Transport

1. In the **Eligible for Free School Transport** panel, any existing **Free School Transport Eligibility** details are displayed.



2. Highlight an existing entry and click the **Open** button to edit the details or click the **New** button to display the **Add/Edit Free School Transport Eligibility** dialog.



3. Specify the **Start Date** and **End Date** of the **Free School Transport Eligibility** period by clicking the applicable **Calendar** button and selecting the required date.
4. Click the **OK** button to save the details.

Adding/Editing Service Children Information

- Service Children in Education Indicator

  This indicates if a child has a parent or parents who are service personnel, serving in regular military units of all forces and exercising parental care and responsibility. The information helps to identify both the impact that being a service child has on their education and the impact that catering for large numbers of service children has on the school.

- Source of Service Children in Education Indicator

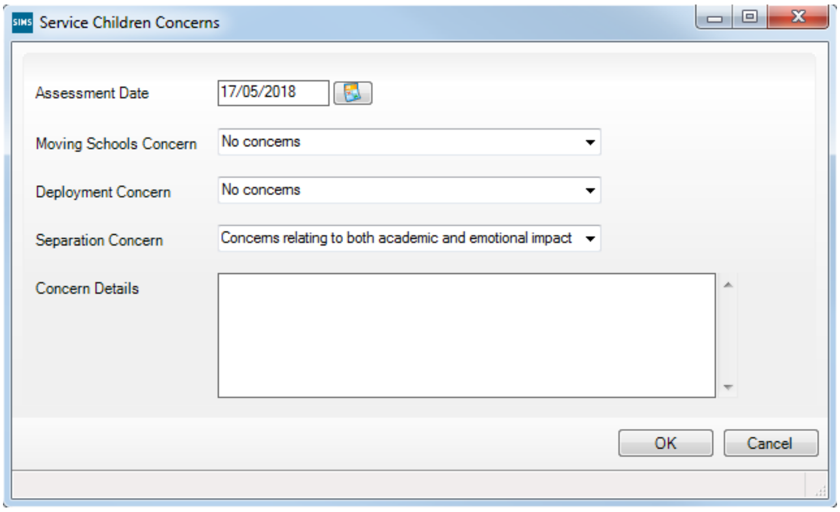
  This indicates the source of the Service Child in Education indicator, e.g. parents, school, pupil/student.

  These two fields should therefore be completed for any pupil/student with a parent or parents who are service personnel.

1. Select the appropriate option from the **Service Children in Education** drop-down list.
2. Select how the school was notified about this information by selecting from the **Source of Service Children in Education** drop-down list.
3. Click the **New** button adjacent to the **Service Child Concerns** panel to display the **Service Children Concerns** dialog. Alternatively, highlight an existing record and click the **Open** button.

   The **Service Child Concerns** panel is not exclusively for pupil/students who have parents who are service personnel. The pupil/student may have concerns despite the parent(s) no longer being in the forces.

   For amendments to a concern that was not recorded in error, it is recommended that a new record is created, rather than editing an existing one.



4. Select the **Assessment Date** from the Calendar.
5. Select whether there are any moving school-, deployment- or separation-related concerns for the pupil/student from the relevant drop-down lists.
6. Enter notes about the concerns in the **Concern Details** field.
7. Click the **OK** button to return to the **Pupil** (or **Student**) **Details** page. The new or edited record is displayed in the **Service Child Concerns** panel.

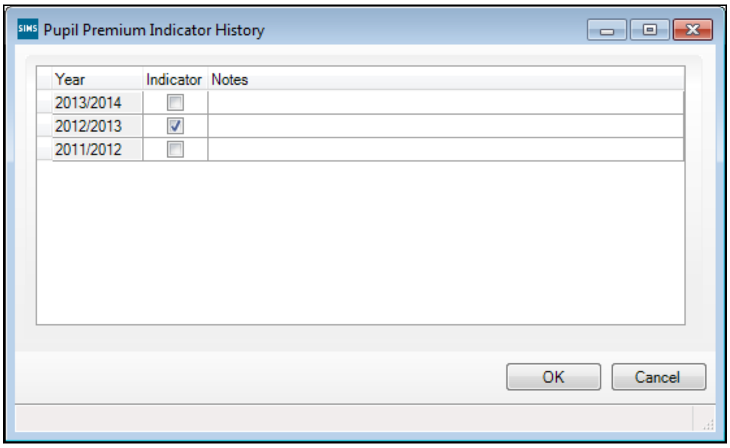
Recording Uniform Allowance

Select the **Uniform Allowance** check box to indicate whether the pupil/student receives a contribution from the LA or Social Services to help towards the cost of their school uniform.

Recording Pupil Premium Information

The Pupil Premium is an amount of money paid to schools for any pupil who has been eligible for Free School Meals at any time in the last six years. Schools have the freedom to spend the premium in a way they think best supports the raising of attainment for these pupils. It is now possible to record and monitor the progress of pupils eligible for the Pupil Premium. Pupil Premium fields have also been added to the Reporting Dictionary.

1. Select the **Pupil Premium Indicator for year <current academic year>** check box to indicate whether or not the pupil/student may be eligible for the Pupil Premium.
2. Enter any **Notes** that support the decision.
3. To view or edit the Pupil Premium indicator for previous or following years, click the adjacent **Browser** button to display the **Pupil Premium Indicator History** dialog.



NOTE: An academic year is added to this table automatically when the system date reaches 1 August of the current academic year.

The **Pupil Premium Indicator History** dialog displays a row for each of the academic years from 2011 to the next academic year.

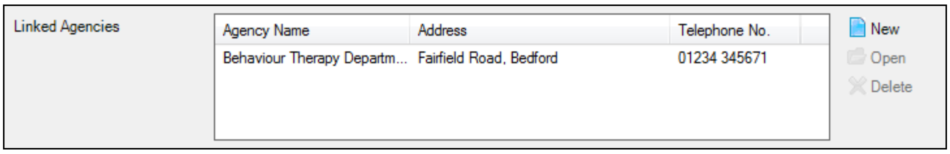
4. Select the **Indicator** check box of the academic year(s) for which you think the selected pupil/student may be eligible for the Pupil Premium.
5. Enter any applicable **Notes** supporting this selection.

Adding/Editing Linked Agencies

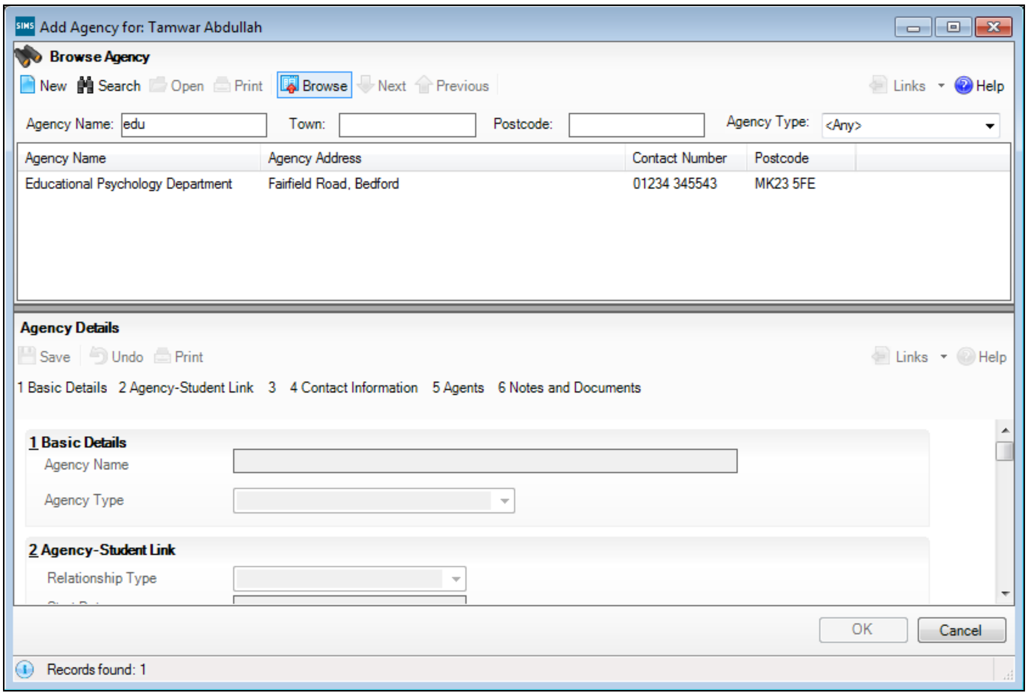
It is possible to link the pupil/student to any existing agency, such as the Education Welfare Service, health department, Probation Service, etc.

IMPORTANT NOTES: *When creating an application for a prospective student that is linked to an agency (via the* ***Application*** *icon on the toolbar or* ***Focus | Admission | Application****), the linked agency is transferred automatically from the agency's record to application's record.*

When adding an agency to an application record (via the ***Application*** *icon on the toolbar or* ***Focus | Admission | Application****), the linked agency is transferred to pupil/student's main record on the date they are actually admitted to the school.*



1. Click the **New** button adjacent to the **Linked Agencies** panel to display the **Add Agency for:** dialog.

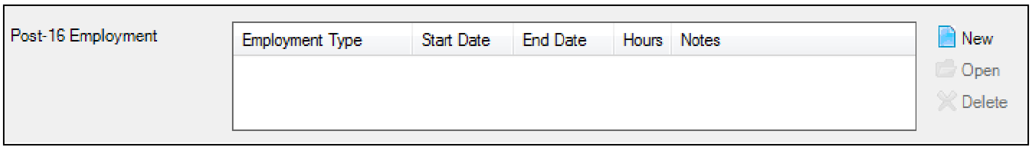


2. Search for the required agency then click the **Open** button to display their details in the lower section of the dialog. If the required agency does not already exist, click the **New** button to create a new one (please see *Adding an Agency* on page *233*).
3. Select the **Relationship Type** from the drop-down list in the **Agency-Student Link** panel, e.g. **LA Support**.

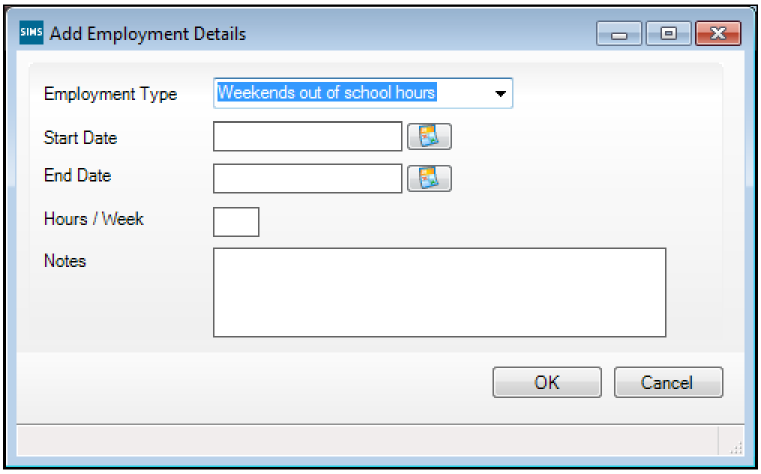
4. Enter a **Start Date** for the linked agency. Specify an **End Date** if the pupil/student is to be linked for a limited period only.
5. Select the **SEN Link** check box if the pupil/student is to be linked on the basis of an SEN need (this adds them as a Linked Adult in the SEN area of SIMS).
6. Click the **Save** button then click the **OK** button to add the link. Repeat for any other linked agencies.

Recording Post-16 Employment Information

It is possible for schools in England to record employment details for Post-16 students whose **Year Taught In** is 12 or above.



1. Highlight an existing entry then click the **Open** button to edit the details or click the **New** button to display the **Add/Edit Employment Details** dialog.



2. Select the **Employment Type** from the drop-down list, i.e. **Weekends out of school hours**, **Weekday(s) out of school hours** or **Schools Hours**.
3. Specify the **Start Date** of the employment period by clicking the **Calendar** button then selecting the required date.
4. Specify the **End Date** of the employment. Please note that the recording of overlapping periods of employment is not permitted.
5. Enter the number of **Hours/Week**, together with any **Notes**.
6. Click the **OK** button to save the details.

Adding an Agency

In SIMS, an ‘agency’ is an organisation that employs agents who have been, or will be recorded in SIMS, such as the Education Welfare Service, Local Authority Support Team, a Taxi Firm, etc. An ‘agent’ is an individual who has some involvement with a pupil/student and works for an agency recorded in SIMS such as Education Welfare Officers (EWOs), doctors, educational psychologists, speech therapists, etc.

Once added, one or more pupil/students can be attached to the agency. This can be particularly useful for example, for recording all the pupil/students who use a specific Behavioural Support Service.

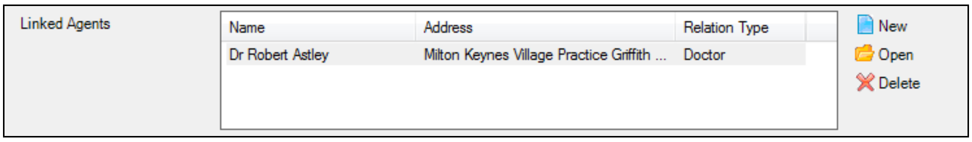
It is advisable to add agencies to SIMS before adding individual agents. This enables agents to be attached to the required agency at a later stage.

Additional Resources:

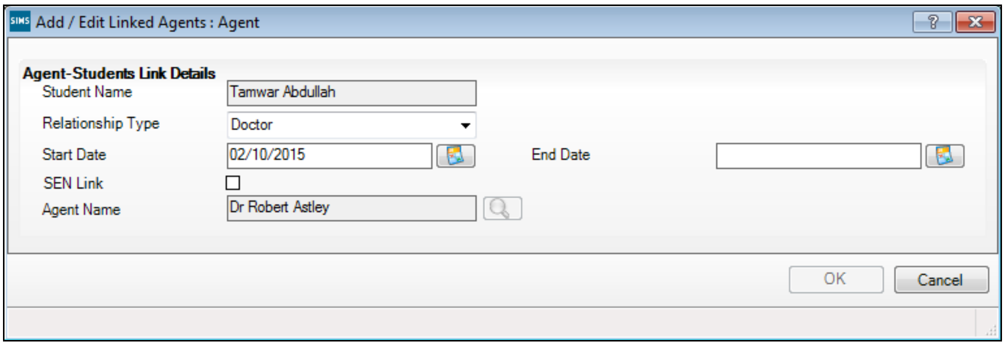
Adding an Agency section in the *General SIMS Setups* chapter of the *Setting up and Administering SIMS* handbook

Adding/Editing Linked Agents

It is possible to link the pupil/student to any existing agent, such as an Education Welfare Officer, Speech Therapist, etc.

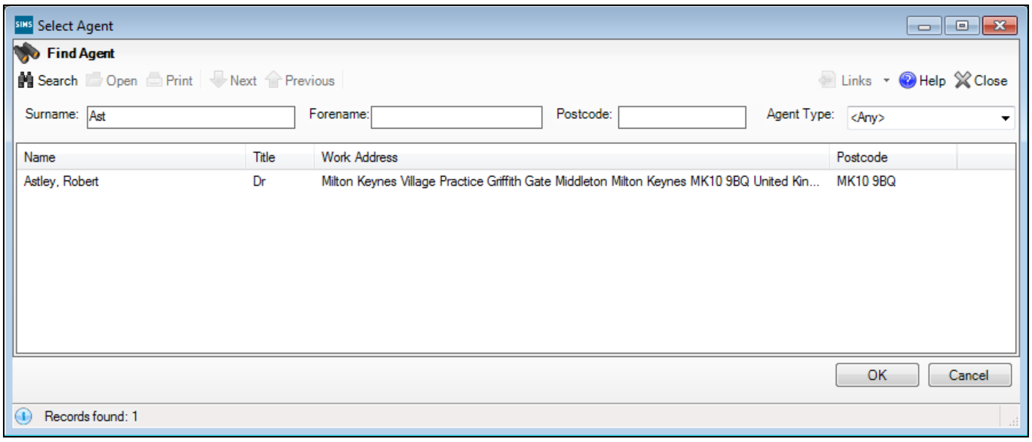


1. Click the **New** button adjacent to the **Linked Agents** panel to display the **Add/Edit Linked Agents** dialog.



2. Select the **Relationship Type** from the drop-down list, e.g. `Doctor`.
3. Enter a **Start Date** for the linked agent. Specify an **End Date** if the pupil/student is to be linked for a limited period only.
4. Select the **SEN Link** check box if the pupil/student is to be linked on the basis of a SEN need, (this adds them as a Linked Adult in the SEN area of SIMS).

5. Search for the required agent by clicking the **Browser** button to display the **Select Agent** browser.



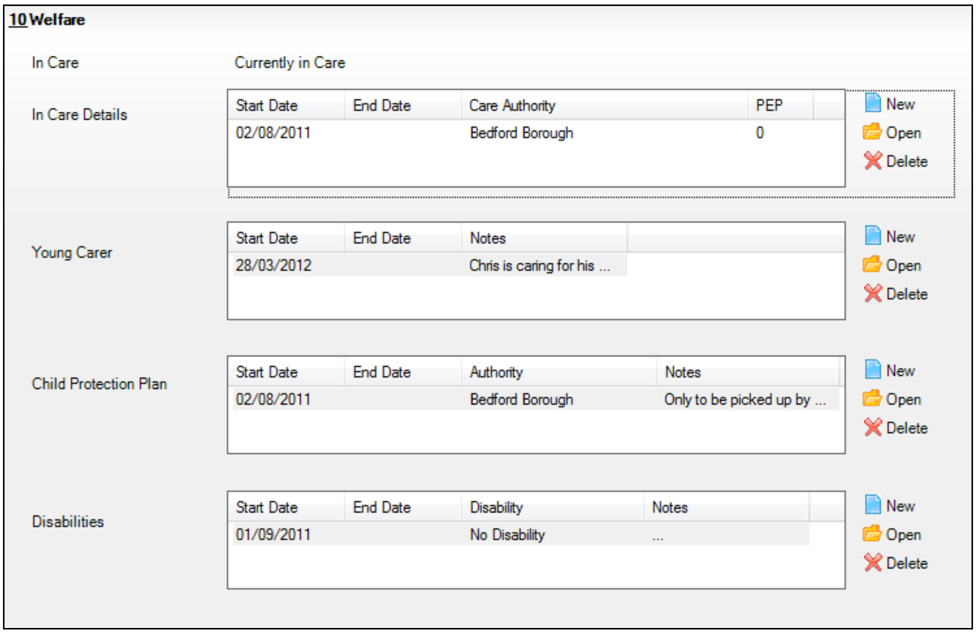
6. Highlight the required agent then click the **OK** button to select them and return to the **Add/Edit Linked Agents** dialog.
7. Click the **OK** button to add the linked agent who is displayed in the **Linked Agents** panel.

Adding/Editing Welfare Information

The **Welfare** panel is used to record welfare information including any in care, young carer, child protection and/or disabilities details. A pupil/student is considered In Care or Looked After if he or she is in the care of the Local Authority or is provided with accommodation for more than 24 hours by the authority.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

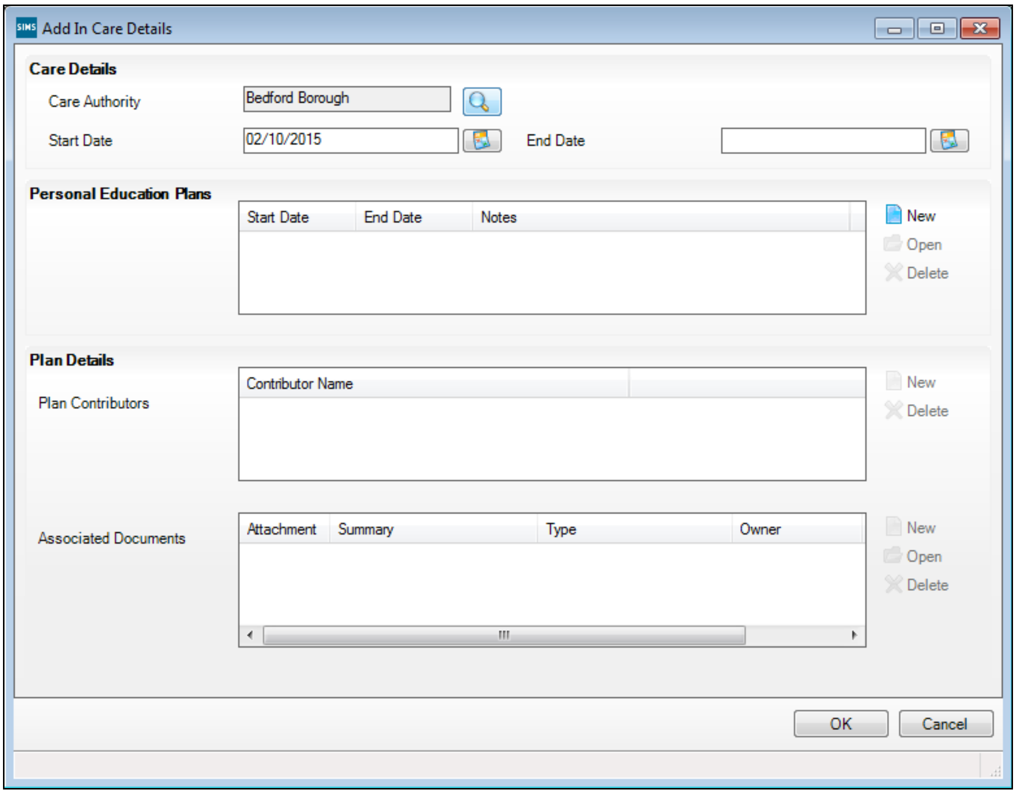
2. Click the **Welfare** hyperlink to display the **Welfare** panel.



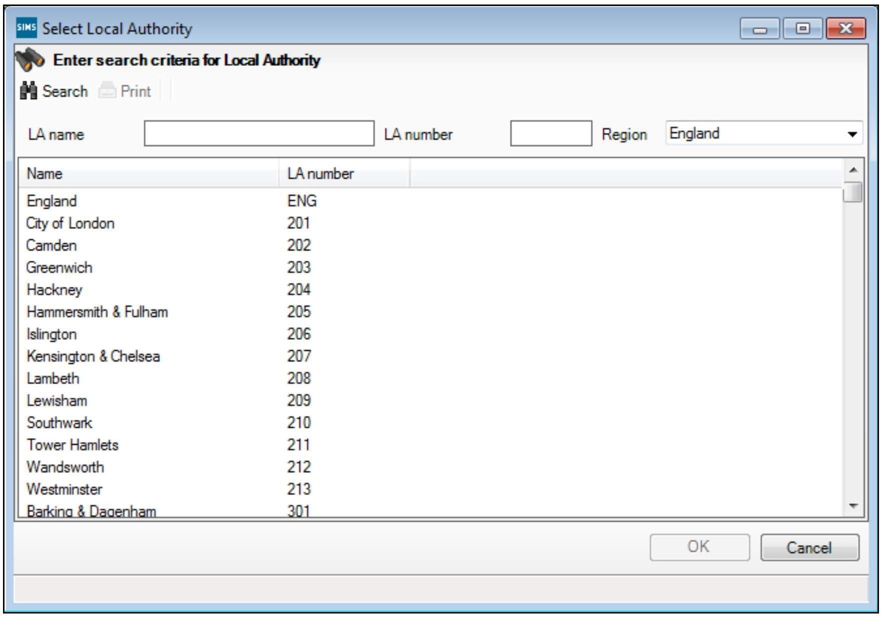
Recording In Care Information

1. Click the **New** button adjacent to the **In Care Details** panel to display the **Add/Edit In Care Details** dialog. If there are any existing **In Care Details** in the panel, the text reads **Currently In Care**. Highlight the relevant entry and click the **Open** button to edit the existing details.

> *NOTE: A minimum of* ***Care Authority*** *and* ***Start Date*** *must be supplied for the purposes of the School Census for any child who is in care.*



2. Select the **Care Authority** by clicking the **Browser** button to display the **Select Local Authority** dialog.



3. Search for, then double click the required care authority to select them.

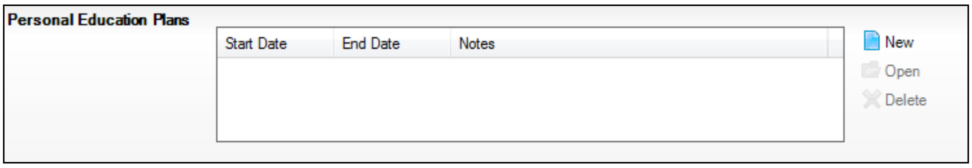
4. Enter the **Start Date** and **End Date** for the in care period.

> *NOTE: If the child was imported via CTF, the in care details* ***Start Date*** *defaults to the date the CTF was imported. If the actual in care* ***Start Date*** *falls after the date of admission, this should be manually amended to the correct date or date of admission.*

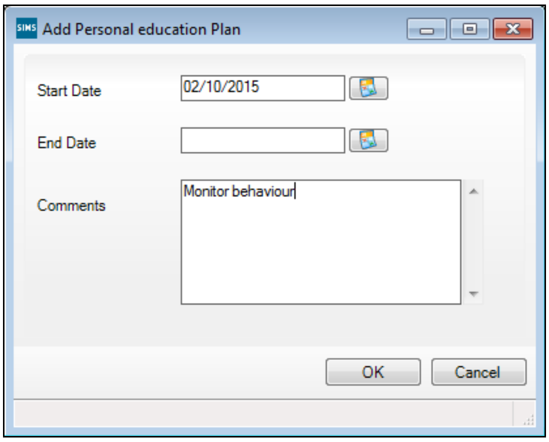
Recording Personal Education Plans

An individual Personal Education Plan (PEP) should be created for all pupil/students who are in care. This plan ensures that access to services and adequate support are available for the pupil/student whilst ensuring that stability is maintained and disruption to their schooling is kept to a minimum. Additionally, the plan acts as a record of progress and achievement for pupil/students with Special Educational Needs and establishes clear goals and development needs.

Every school should have a Designated Teacher who oversees pupil/students who are in care. The Designated Teacher is responsible for liaising with the various professionals who are involved with providing care, support and services for these children. They must also ensure that each child who is in care is issued with a PEP.

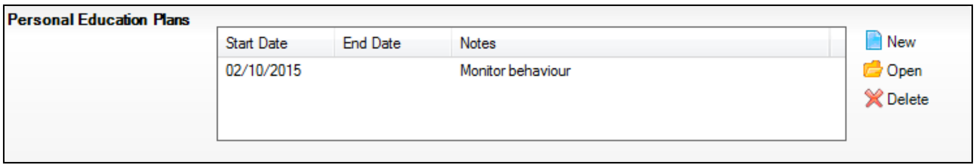


1. Click the **New** button in the **Personal Education Plans** panel to display the **Add Personal Education Plan** dialog.

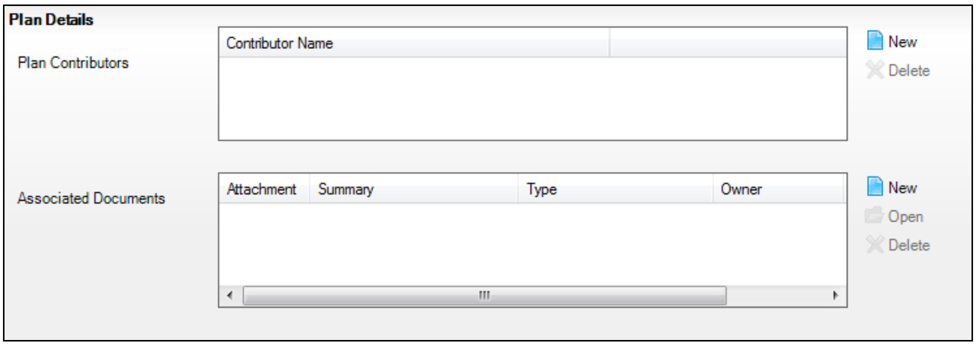


2. Specify the **Start Date** and **End Date** for the period during which the PEP applies.
3. Enter any relevant **Comments** that relate to the issue of the PEP.

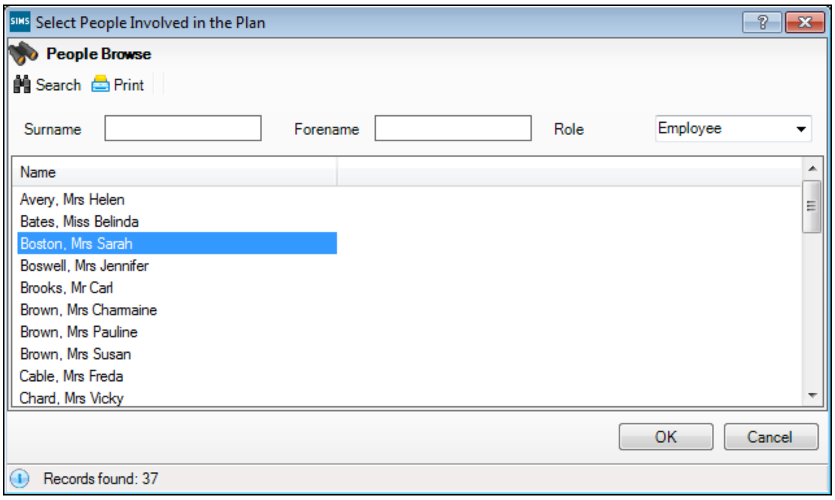
4. Click the **OK** button to add the PEP which is then displayed in the **Personal Education Plans** panel.



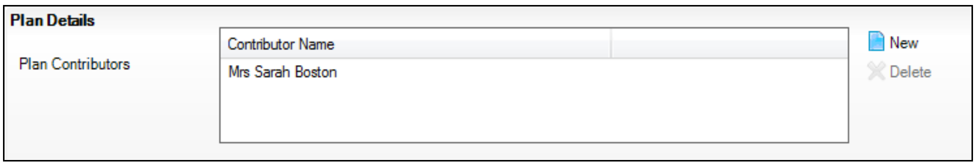
5. The **Plan Details** panel is now activated enabling details of the plan to be added. Click the **New** button adjacent to the **Plan Contributors** to add a designated teacher.



6. From the **People** browser, enter the required search parameters, then click the **Search** button to find the required teacher.



7. Highlight the required teacher then click the **OK** button to select them. Their name is displayed in the **Plan Contributors** panel. Repeat for any other required contributors.



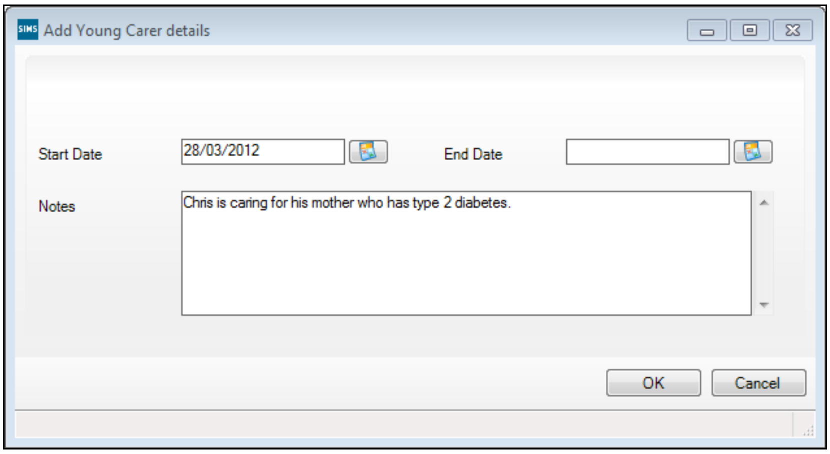
8. If required, attach any relevant documents by clicking the **New** button in the **Associated Documents** panel to display the **Add Note/Document** panel. Add a document (please see *Attaching a New Note/Document* on page *147*) then click the **OK** button in the **Add In Care Details** dialog to return to the **Student Details** page.
9. Once all the required information has been added, click the **Save** button on the toolbar to save the welfare information.

Recording Young Carer Information

Not applicable to schools in Northern Ireland.

The period during which a pupil/student is known to have been providing care for say, a family member, can be recorded in the **Young Carer** table, along with any details of their responsibilities as a carer.

1. Click the **New** button adjacent to the **Young Carer** panel to display the **Add Young Carer details** dialog. Alternatively to edit an existing record, highlight it then click the **Open** button to display the **Edit Young Carer details** dialog.



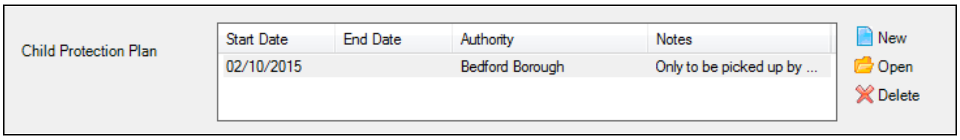
2. The **Start Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting an alternative date.
3. Select an **End Date**, if required.
4. Enter any **Notes** relating to the care that the pupil/student provides.
5. Click the **OK** button to return to the **Pupil** (or **Student**) **Details** page.
6. Click the **Save** button.

Recording Child Protection Plan Information

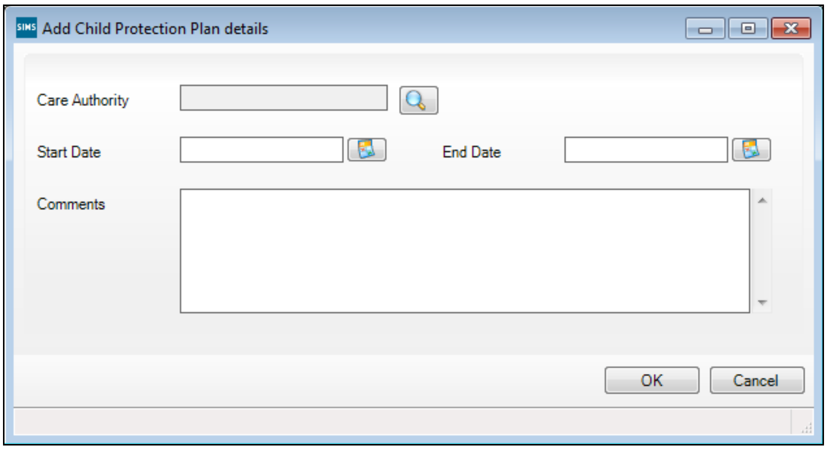
Your school may be notified that a current or potential pupil/student has a Child Protection Plan (formerly Child Protection Register). The purpose of a Child Protection Plan is to ensure that children, where concerns have been raised regarding their safety in the home, are monitored and that appropriate intervention and help is given to safeguard the child.

Children may be at risk because of neglect or physical, emotional or sexual abuse. Should a child move out of the area, the information is passed on to the new Local Authority.

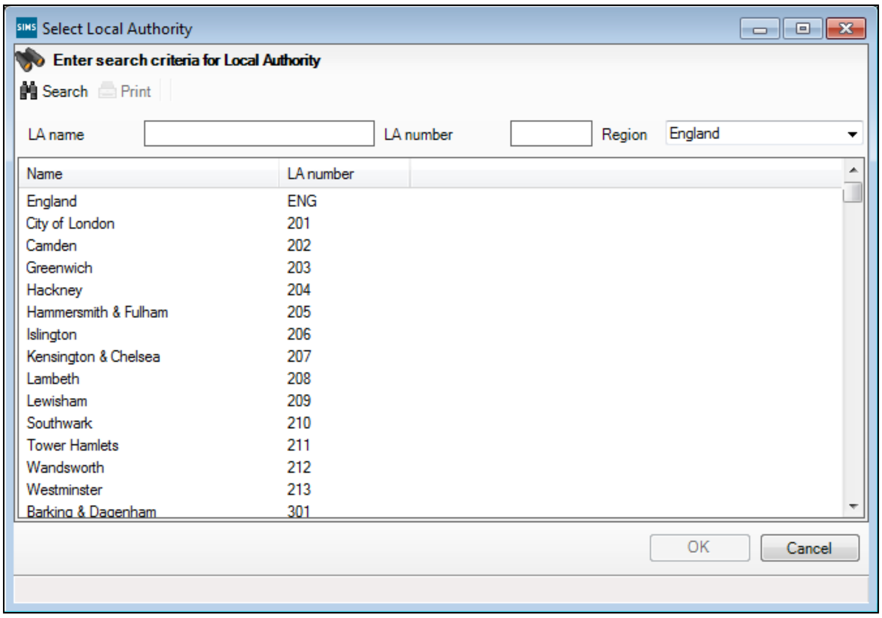
A child or young person will continue to have a Child Protection Plan until it is believed that the child is safe from any future harm. A Child Protection Plan does not affect a parent's/carer's legal responsibilities towards their child/young person. Parent/Carer rights are affected only if legal action is taken to safeguard the child/young person.



1. From the **Welfare** panel, click the **New** button adjacent to the **Child Protection Plan** table to display the **Add Child Protection Plan details** dialog.



2. Click the **Browser** button adjacent to the **Care Authority** field to display the **Select Local Authority** dialog.

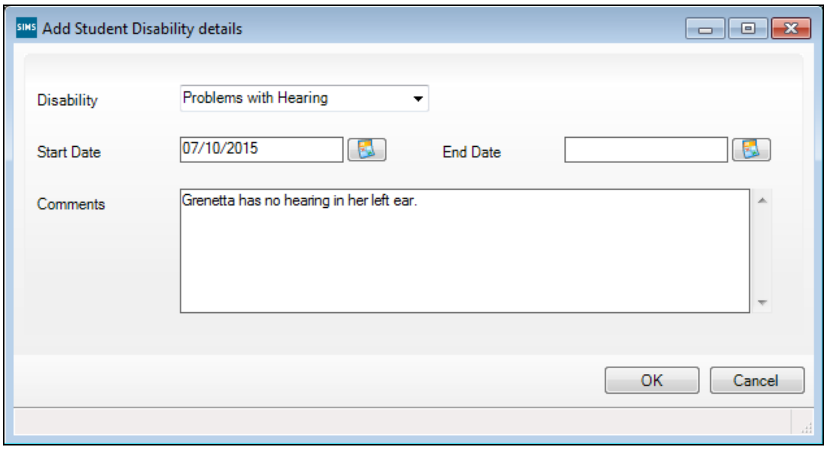


3. Enter the required search parameters then click the **Search** button to display all the matching authorities.

4. Highlight the required authority then click the **OK** button to return to the **Add Child Protection Plan details** dialog.
5. Enter the **Start Date** and **End Date** (if known) for the Child Protection Plan period.
6. Enter any applicable **Comments** then click the **OK** button to add the details to the **Child Protection Plan** table in the **Welfare** panel on the **Pupil** (or **Student**) **Details** page.

Recording Disabilities Information

1. Click the **New** button adjacent to the **Disabilities** table to display the **Add Student Disability details** dialog. Alternatively to edit an existing record, highlight it then click the **Open** button to display the **Edit Student Disability details** dialog.



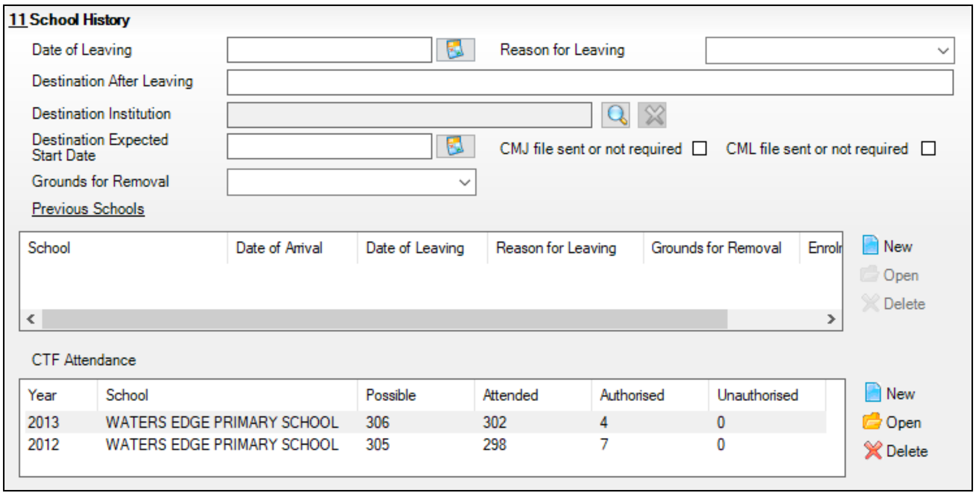
2. Select the required **Disability** from the drop-down list, e.g. **Problems with Hearing**.
3. The **Start Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting an alternative date.
4. Select an **End Date**, if required.
5. Enter any **Comments** relating to the disability record.
6. Click the **OK** button to return to the **Pupil** (or **Student**) **Details** page.
7. Click the **Save** button.

Adding/Editing a Pupil/Student's School History

The **School History** panel is used to record any historical school information such as the previous school and also to record when the pupil/student leaves your school.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.

2. Click the **School History** hyperlink to display the **School History** panel.

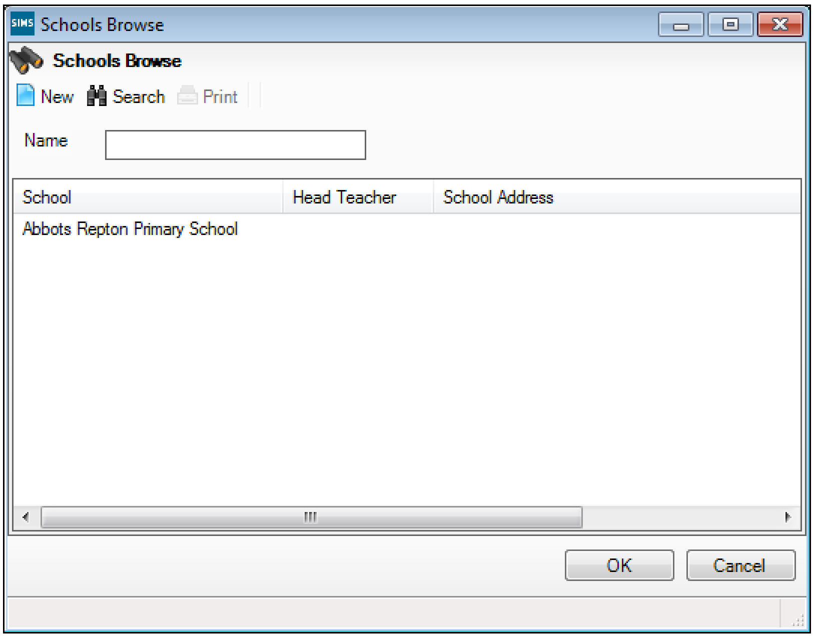


Recording the Pupil/Student as a Leaver

1. Enter the **Date of Leaving** or click the **Calendar** button and select the required date.
2. Select the **Reason for Leaving** from the drop-down list, e.g. **In-year transfer - Maintained school**.
3. Enter their **Destination after Leaving**, such as their next school or the place they are moving to.
4. For schools in England, if the pupil/student is a child deemed missing in education, select the **Grounds for Removal** from the drop-down list.

Recording the Destination Institution

This allows you to record a student's University or Higher Education Institution once they leave your school. Click the **Search** button adjacent to the **Destination Institution** field to display the **Schools** browser.

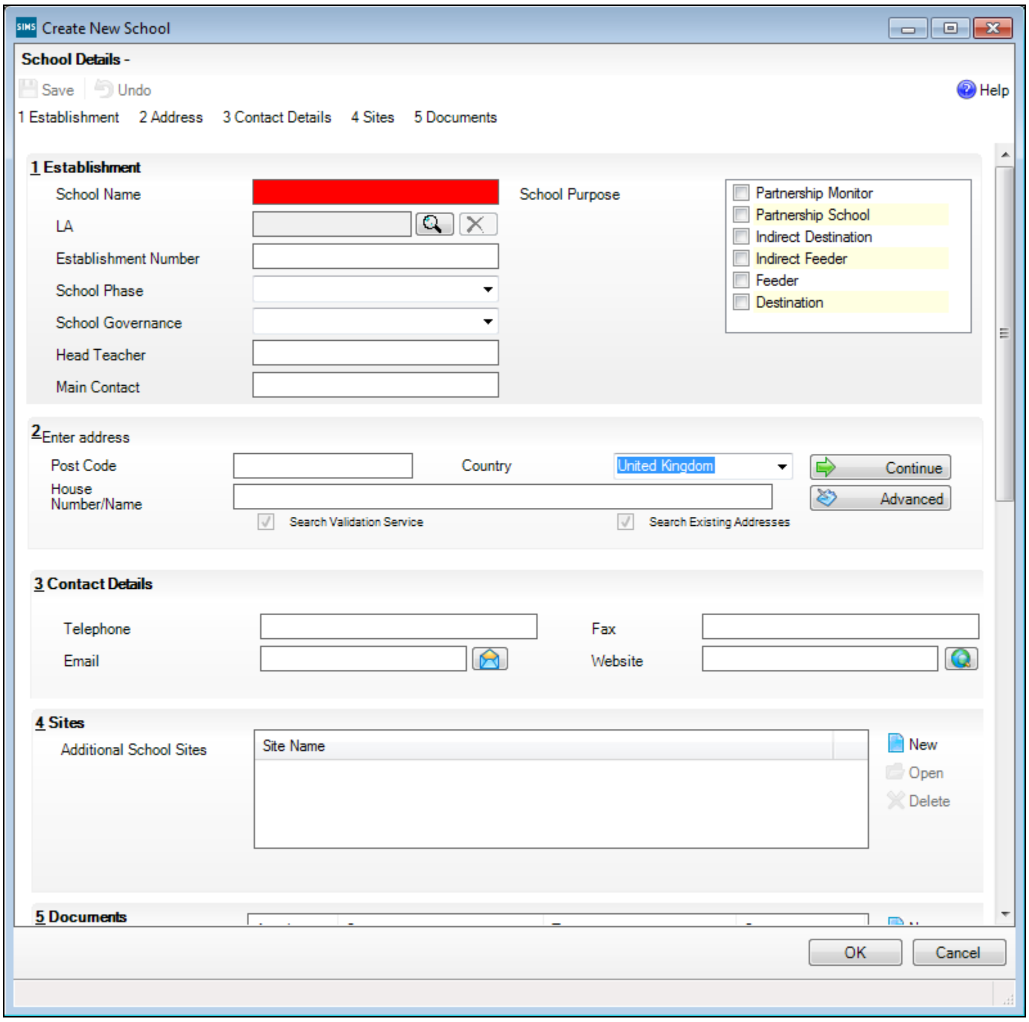


Selecting a Destination Institution

1. To narrow your search, enter all or part of the required institution name in the **Name** field and click the **Search** button. Leaving the **Name** field blank will list all institutions.
2. Highlight the relevant institution and click the **OK** button to return to the **School History** panel.
3. Select the **Destination Expected Start Date** by clicking the **Calendar** button and selecting the required date.

Adding a Destination Institution

1. Click the **New** button in the **Schools** browser to display the **Create New School** dialog.



2. Enter the institution's details and click the **Save** button.
3. Click the **OK** button to return to the **Pupil** (or **Student**) **Details** page.

> *NOTE: The **Destination Institution** will also be listed under other schools (**Tools | Other Schools**)*

Understanding the CMJ and CML Check Boxes

The **CMJ sent or not required** and **CML sent or not required** check boxes are displayed for schools in England and are designed to help track Children Missing in Education. They are designed to be used in conjunction with the **CME - Joiners** and **CME - Leavers** CTF file types (enabled 1 August 2017).

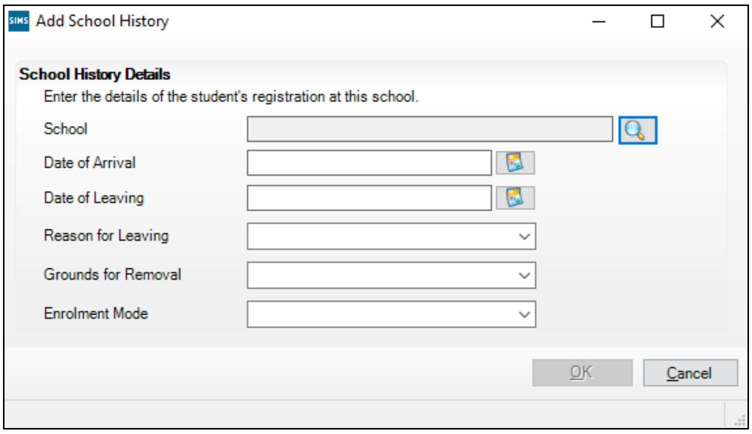
The **CMJ sent or not required** check box is selected automatically when a pupil/student's information is sent in a **CME - Joiners** CTF file. The **CML sent or not required** check box is selected automatically when a pupil/student's information is sent in a **CME - Leavers** CTF file.

For more information, refer to the *Children Missing in Education* document available on the My Account website (https://myaccount.capita-cs.co.uk).

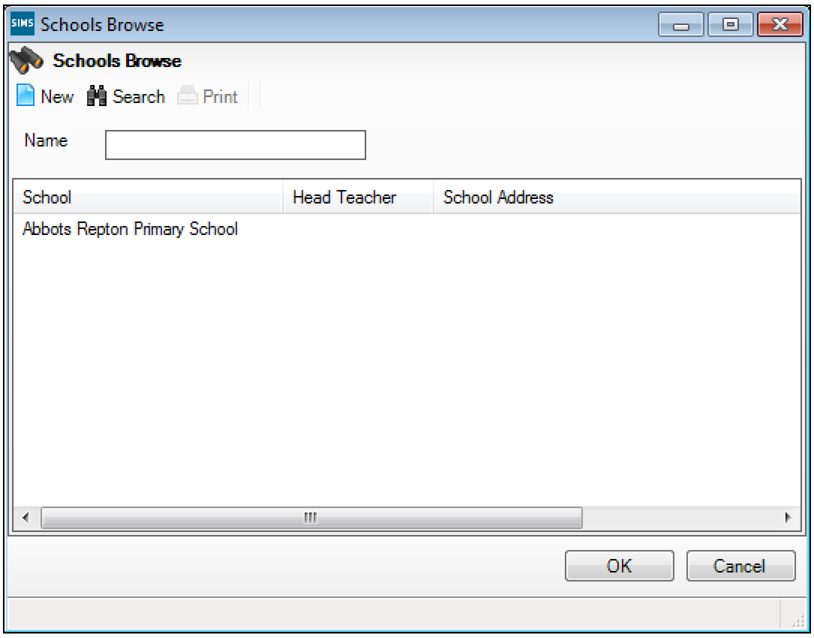
Recording Previous Schools

It is possible to enter a pupil/student's history information for their **Previous Schools** so that a full and detailed record is available of the schools they have attended in the past.

1. Click the **New** button adjacent to the **Previous Schools** panel to display the **Add School History** dialog.



2. Click the **Browser** button to display the **Schools** browser.



3. Enter the name/part name of the school and click the **Search** button.
4. Highlight the required school, then click the **OK** button. To add a school, click the **New** button, enter its details, then click the **Save** button.
5. Enter the **Date of Arrival** and **Date of Leaving** or click the appropriate **Calendar** buttons and select the required dates.
6. Select the **Reason for Leaving**, **Grounds for Removal** and the **Enrolment Mode** from the relevant drop-down lists.
7. Click the **OK** button to save the details.

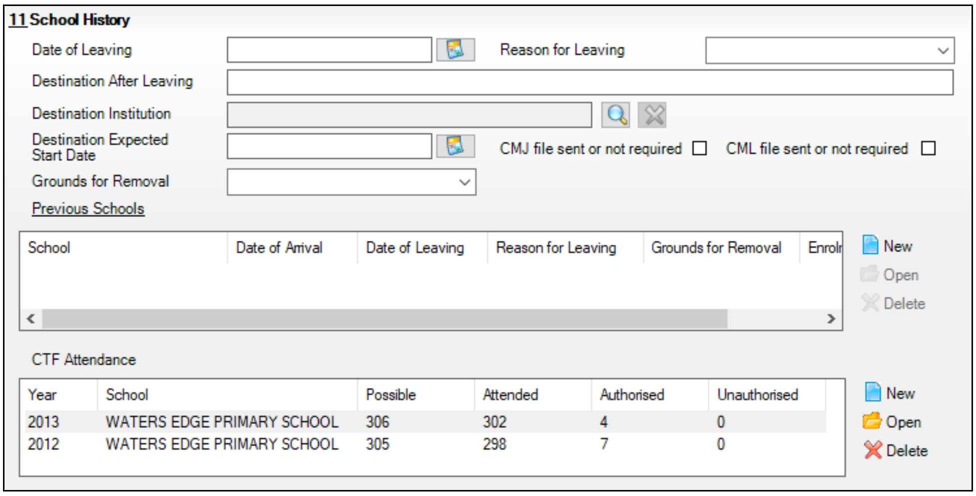
Additional Resources:

Adding/Editing Other Schools in the *General SIMS Setups* chapter of the *Setting up and Administering SIMS* handbook

Viewing/Recording CTF Attendance History

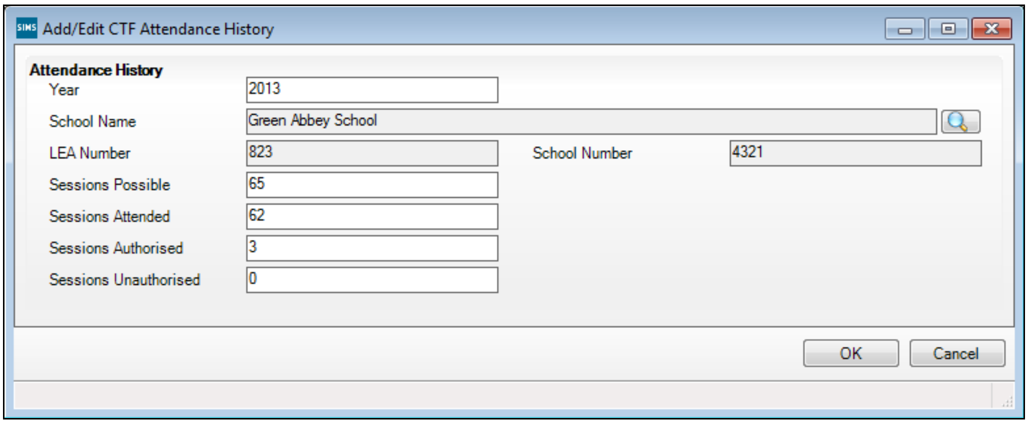
Schools who use Common Transfer Files (CTFs) to import and export pupil/student data in conjunction with the SIMS Attendance module, have the ability to view a pupil/student's CTF Attendance record from within their **Pupil/Student Details** page. Before this information becomes available, schools must select both **Attendance Summary** check boxes, which are located on the **Data to be Imported by Default** and **Data to be Exported by Default** panels, when configuring the **CTF Defaults** via **Tools | Setups | CTF**.

For schools that use CTF, but not SIMS Attendance, the option is available to manually enter CTF Attendance data into a pupil/student's record, if required. These schools must also ensure that they select the **Attendance Summary** check box located on the **Data to be Exported by Default** panel, when configuring the CTF defaults via **Tools** | **Setups** | **CTF**.



The **CTF Attendance** section is located at the bottom of the **School History** panel. Any existing Attendance entries are displayed.

1. Highlight an existing entry and click the **Open** button to edit the details or click the **New** button to display the **Add/Edit CTF Attendance History** dialog.



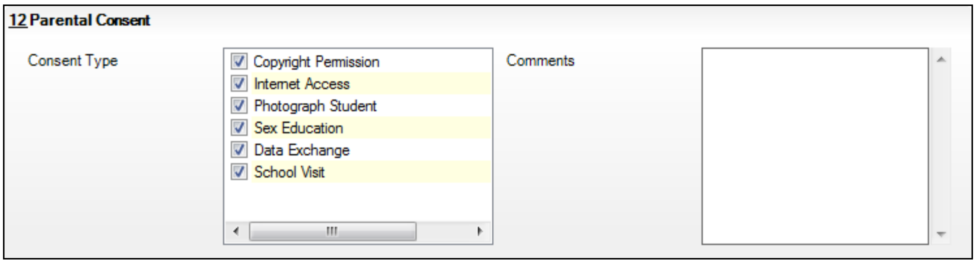
2. Enter the **Year** to which the **Attendance History** relates. The **School Name**, **LA Number** and **School Number** fields are already populated with data entered elsewhere in SIMS.
3. Enter the number of **Sessions Possible**, **Sessions Attended**, **Sessions Authorised** and **Sessions Unauthorised** and click the **OK** button to save the details.

Adding/Editing Parental Consent Information

Pupil/students can participate in various school activities, some of which may include accessing the Internet, leaving the school premises on a supervised visit, or receiving Sex Education.

To ensure that schools have sought and been given permission from parents for their children to participate in some or all of these activities, schools can indicate specifically which activities the pupil/student is sanctioned to be involved in.

1. Create a new pupil/student record (please see *Recording a New Pupil/Student* on page *169*) or select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser and select the required pupil/student.
2. Click the **Parental Consent** hyperlink to display the **Parental Consent** panel.



A list of pre-defined **Consent Types** is displayed. These relate to different school activities that Parental Consent can be given for. The values displayed in this section can be amended via **Tools | Maintain Lookups**.

3. Select the required check boxes adjacent to the relevant **Consent Types**.
4. Record any **Comments** that relate to the Consent Types selected as required.

Recording User Defined Fields

NOTE: This section is applicable only to school administrators.

Your System Administrator may have set up User Defined Fields which enable you to record information required specifically for your schools. Examples include Parish, Single Parent Family, Car Registration Numbers, Locker Numbers, etc. These can be recorded as fields, check boxes, radio buttons, etc.

Any such fields will be made available in the **User Defined Fields** panel which can be accessed by clicking the **User Defined Fields** hyperlink. Complete any fields as required.

Additional Resources:

Setting up and Administering SIMS handbook

Recording Leavers

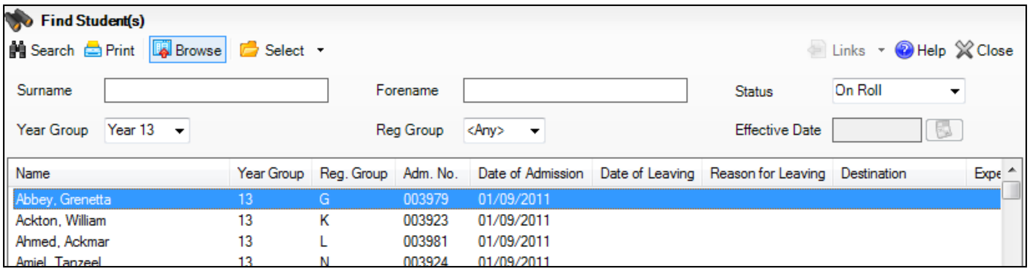
If a pupil/student leaves your school for any reason, you can mark them as a leaver which removes them from your school, but enables historical records to be kept. During the Summer term, for example, you need to mark most or all pupil/students in your top year as leavers so that they are no longer on-roll at the start of the new academic year. The date of leaving and leaving destination, together with the reason for leaving can be recorded.

***IMPORTANT NOTES:** To ensure that historical data is accurately maintained, it is essential that you do not record leavers by removing their date of admission.*

If a pupil/student who was a leaver subsequently returns, please ensure that you re-admit them – do not remove the date of leaving (please see Re-admitting Pupil/Students *on page* 302*).*

*To ensure that information required for statutory returns (e.g. the School Census) is accurate and up-to-date, check that the leavers have been given an SEN Status other than **Not Assigned** and that an **Ethnicity** has been recorded before making the pupil/student a leaver.*

1. Select **Routines** | **Pupil** (or **Student**) | **Leavers** to display the **Find Student(s)** browser.



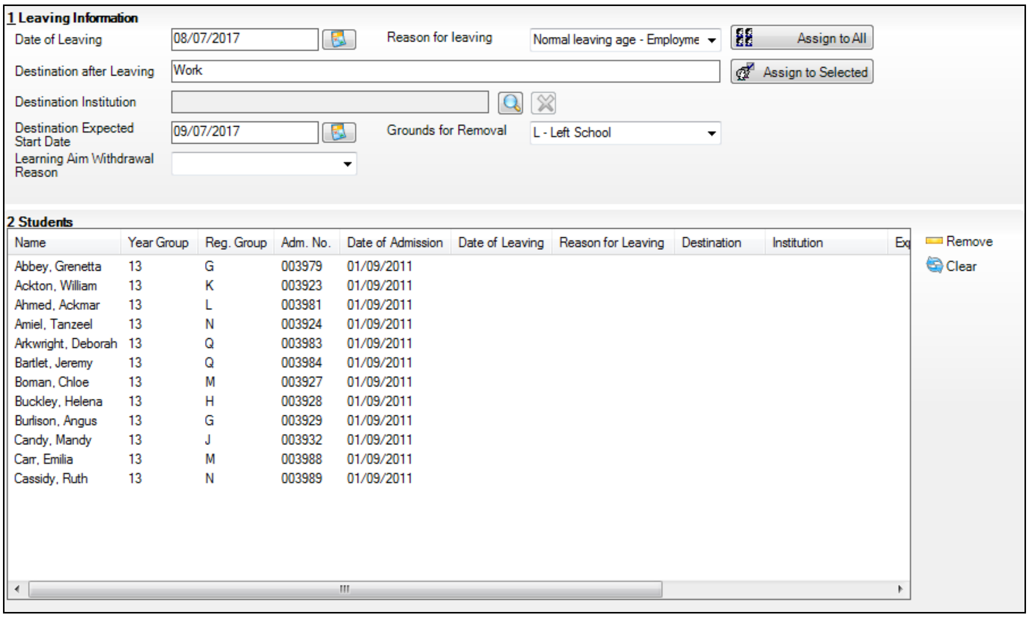
2. Search for the required **Year** or **Reg Group** (or **Class**) by selecting from the appropriate drop-down lists and then click the **Search** button.

   To select all the pupil/students displayed in the browser, click the **Select** button down arrow and select **All** from the drop-down menu.

   To select a group of pupil/students, highlight them using any of the following methods:

   - Hold down the **Ctrl** key and single-click each required pupil/student.
   - To highlight sequentially listed children, single-click the first pupil in the list, hold down the **Shift** key then click the last required pupil in the list.

3. Once the required pupil/students have been highlighted, click the **Select** button. The selected pupil/students are then transferred to the **Students** panel.



4. Enter the **Date of Leaving** or click the **Calendar** button and select the required date.

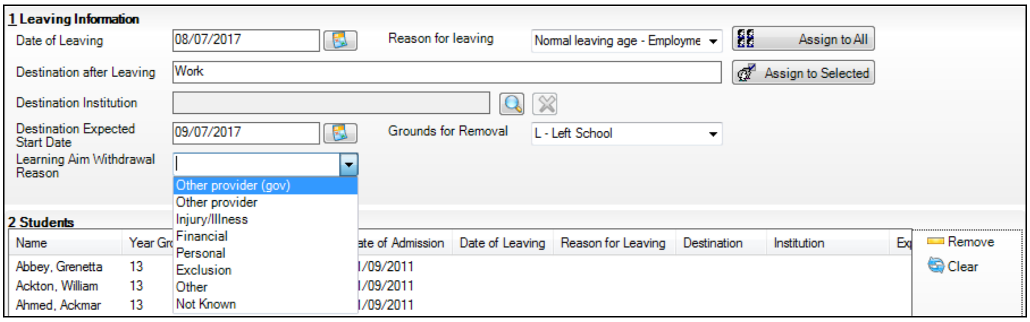
 *Calendar button*

This date of leaving should be the date that the pupil/student is actually leaving the school if they are not for transferring from Junior/Primary to Secondary phase. Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not have any gaps between dates and may suggest a date of leaving (the old school) of 4th September and the date of admission (into the new school) of 5th September. If you are in any doubt, please contact your Local Authority for advice.

> ***IMPORTANT NOTE:*** *It is recommended that pupil/students leaving at the end of Year 11 who may return to Year 12, are not given a date of leaving until it has been confirmed that they will be leaving the school at the end of the Summer term as this may cause issues with Attendance information.*

5. Select the **Reason for Leaving** from the drop-down list, such as **Normal leaving age - Employment**.
6. Enter the **Destination after Leaving** if required. Alternatively, you can apply the **Reason for Leaving** to one set of pupil/students (as described in the previous step), then select the **Destination after Leaving** for a different, or subset of pupil/students.
7. Enter the **Destination Expected Start Date** or select the required date from the Calendar.
8. For schools in England, if the pupil/student is a child deemed missing in education, select the **Grounds for Removal** from the drop-down list.

9. Secondary schools in England can select a **Learning Aim Withdrawal Reason** from the drop-down list. Secondary schools in Wales can select an **LA Withdrawal Reason** (Learning Activity). When recording a **Learning Aim Withdrawal Reason** for Post 16 students, this information is used by Course Manager.



10. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys (as described in step 2) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
11. If an error has been made, highlight the particular pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
12. To remove a pupil/student from the list, highlight their name and then click the **Remove** button.
13. To clear the contents of the fields in the **Leaving Information** panel, highlight the required pupil/student(s) then click the **Clear** button. Re-enter the information as required.
14. Click the **Save** button to save the changes. The chosen pupil/student(s) are recorded with a date of leaving on the date specified.

Adding a Pupil/Student to your Favourites

Any pupil/student can be added to your **Favourites** panel, viewed on the **Home Page**. This is useful for quickly accessing pupil/student records that you need to regularly check or update.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Pupil** (or **Student**) browser.
2. Enter the necessary criteria and click the **Search** button to populate the browser.
3. Click to highlight the required pupil/student and click the **Open** button to display their **Student Details** page.
4. Click the **Favourites** button to add this pupil/student to your favourites panel on the **Home Page**.

07| Updating and Deleting Pupil/Student Information in Bulk

Updating Pupil/Student Information in Bulk

Introduction to Bulk Update

The facility to Bulk Update pupil/student information enables you to simultaneously assign values to a group of pupil/students, and then edit any individual exceptions if required. You may for example, wish to set the **Emergency Consent** to **Yes** for all pupil/students within a group and then edit the exceptions. It is also a useful function for finding any missing values, such as missing Ethnicity or an invalid Religion code. This can be particularly helpful when preparing for statutory returns such as the School Census.

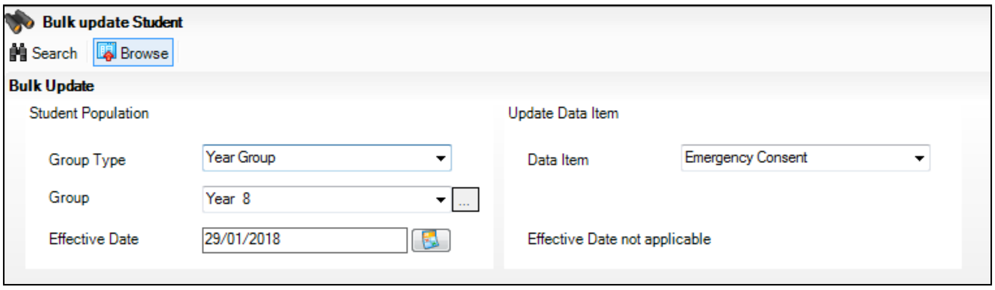
The following information can be edited using Bulk Update.

- Birth Certificate Seen
- Boarder Status
- Country of Birth
- Disabilities
- Emergency Consent
- English Additional Language
- Ethnic Data Source
- Ethnicity
- First Language
- First Language Source
- More Able/Talented subject
- Home Language
- Home Religion
- Medical Condition
- Mode of Travel
- National Identity (Welsh schools)
- Parental Consent
- Proficiency in English (English Maintained schools)
- Protect from Bulk Data Deletion
- Pupil Nationality
- Pupil Premium Indicator

- SEN Provision Type
- SEN Status
- Service Children in Education
- Source of Service Children
- Speaks Welsh (Welsh schools)
- User Defined Fields (**True/False** and **Lookup** types only, as defined in **Tools | Setups | User Defined Fields**)
- Youth Support Services Agreement (Secondary schools).

Choosing the Records to Bulk Update

1. Select **Routines | Pupil (or Student) | Bulk Update** to display the **Bulk Update Pupil** (or **Student**) browser.



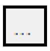
2. In the **Student Population** section, select the required **Group Type** and **Group** from the drop-down lists.

   The **Group Type** indicates the type of group you wish to work with whilst the **Group** allows you to select the specific group of pupil/students to edit. For example, selecting a **Group Type** of **Year** allows you to select a specific year from the **Group** drop-down list, such as **Year 1**.

   When searching for missing information, the **Group Type** is usually a field of data, such as **Ethnicity** and the **Group** will be a specific value, such as **Arab**. This shows any pupil/students who do not currently have an ethnicity recorded against them. This can be particularly useful when preparing data for statutory returns such as the School Census.

   It is also possible to use this functionality to review the data entered for all the pupil/students in the school. This is achieved by selecting **Year Group** from the **Group Type** drop-down list and **<ANY>** from the **Group** drop-down list and then selecting the required **Data Item**.

3. To select a group that is no longer in use (if required), click the **Inactive** button. Inactive groups can be identified by a yellow exclamation mark icon in the drop-down list.

 *Inactive button*

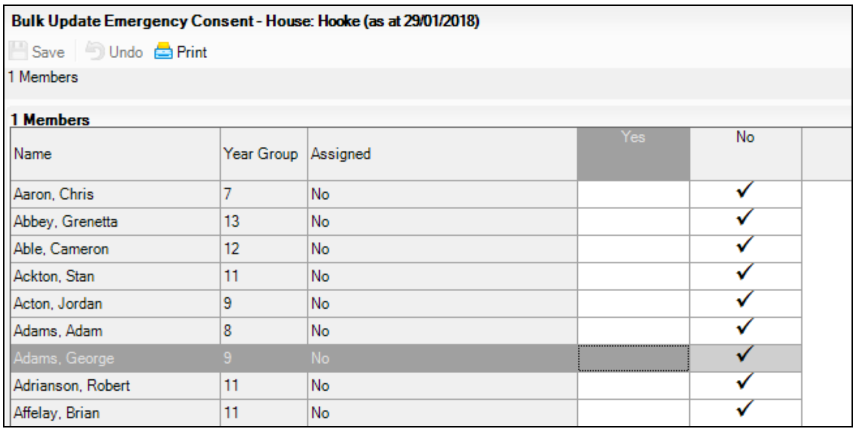
4. The **Effective Date** is the date on which the group is based and defaults to today's date, e.g. the members of Year 1 today. This can be changed if required, by entering a new date or clicking the **Calendar** button and selecting a different date. Some data items are not dated and the **Effective Date not applicable text** is displayed.

    *Calendar button*

5. In the **Update Data Item** section, select the required **Data Item** from the drop-down list. This is the item of data that you wish to edit for the selected group of pupil/students. In the previous example, **Emergency Consent** has been selected.
6. The **Effective Date** is the date from which the data item is changed and defaults to today's date. For example, setting the date to 01/01/18 will mean that the data item will be updated from that date, up to and including today (onwards). Enter a different date if required or click the **Calendar** button and select a different date.

   In some circumstances, it may be useful to edit the **Effective Date**. For example, there may be occasions when data needs to be historically edited for the purpose of statutory returns such as the School Census.
7. Click the **Search** button to display a list of pupil/students matching the selected criteria, e.g. all pupil/students in **Year 1**.

   The browser may automatically minimise (if you have applied this setting in **Tools | Setups | User Options**) to increase the available screen space (click the **Browser** button to display the browser if required). Members of the selected group are displayed together with the columns of data that can be edited.



Bulk Update Emergency Consent - House: Hooke (as at 29/01/2018)

Save Undo Print

1 Members

1 Members

Name	Year Group	Assigned	Yes	No
Aaron, Chris	7	No		✓
Abbey, Grenetta	13	No		✓
Able, Cameron	12	No		✓
Ackton, Stan	11	No		✓
Acton, Jordan	9	No		✓
Adams, Adam	8	No		✓
Adams, George	9	No		✓
Adrianson, Robert	11	No		✓
Affelay, Brian	11	No		✓

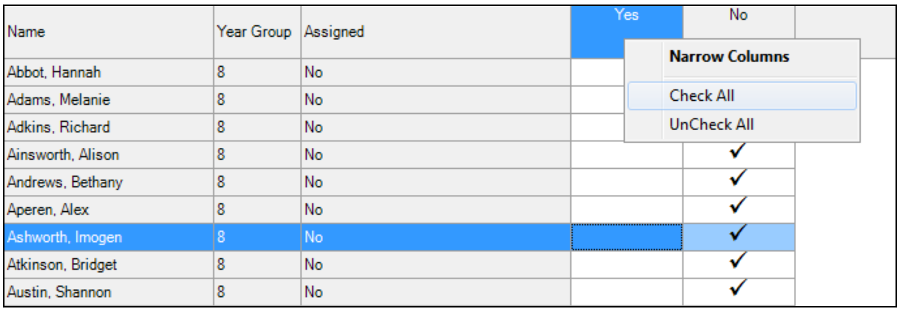
The total number of records returned is listed at the bottom of the page. The totals are adjusted as the bulk edits are made.

Total	158		158	0	158

> *TIP: This functionality can also be useful for finding records with missing information. For example, to find records where Ethnicity is missing, select **Ethnicity** as the **Group Type**, **<None>** as the **Group** and **Ethnicity** as the **Data Item**. The missing information can then be entered.*

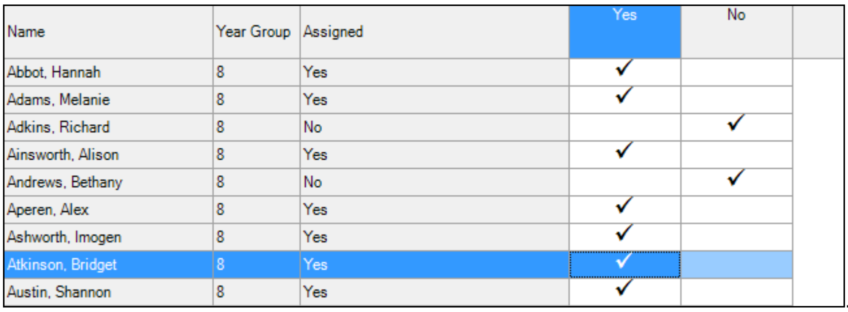
Bulk Editing the Data

1. Right-click the heading of a data entry column (white background) and select **Check All** to populate the column with ticks. Alternatively, select **Uncheck All** to remove all the ticks from the column. The **Assigned** column displays the selected choice.



Name	Year Group	Assigned	Yes	No
Abbot, Hannah	8	No		
Adams, Melanie	8	No		
Adkins, Richard	8	No		
Ainsworth, Alison	8	No		✓
Andrews, Bethany	8	No		✓
Aperen, Alex	8	No		✓
Ashworth, Imogen	8	No		✓
Atkinson, Bridget	8	No		✓
Austin, Shannon	8	No		✓

2. Click in the cell of a specific pupil/student to change an individual value as shown in the following graphic:



Name	Year Group	Assigned	Yes	No
Abbot, Hannah	8	Yes	✓	
Adams, Melanie	8	Yes	✓	
Adkins, Richard	8	No		✓
Ainsworth, Alison	8	Yes	✓	
Andrews, Bethany	8	No		✓
Aperen, Alex	8	Yes	✓	
Ashworth, Imogen	8	Yes	✓	
Atkinson, Bridget	8	Yes	✓	
Austin, Shannon	8	Yes	✓	

3. If required, undo any changes by clicking the **Undo** button – this returns the data to its original state.
4. Once you have made all the required changes, click the **Save** button to bulk update the records.

   Click the **Print** button to export the list to Microsoft® Excel.

> *TIPS: Right-click the heading of a data entry column (white background) and select **Narrow Columns** to reduce the width of the columns.*
>
> *Right-click the heading of any read-only column (grey background) and select any additional columns to be displayed from the pop-up menu, such as **Date of Birth**, **Ad No.**, **Gender**, etc.*
>
> *Single-click any column heading to order the data by that column.*
>
> *Assign values to multiple pupil/students within the group using any of the following methods. Hold down the **Ctrl** key and click the row of each required pupil/student to highlight them. Release the **Ctrl** key, and then click in the required column to add a tick to the selected pupil/student. To enter values for sequentially listed pupil/students, single-click the first pupil/student, hold down the **Shift** key, then single-click the last required pupil/student in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key). Release the **Shift** key then click in the required column to add a tick to the selected pupil/students.*

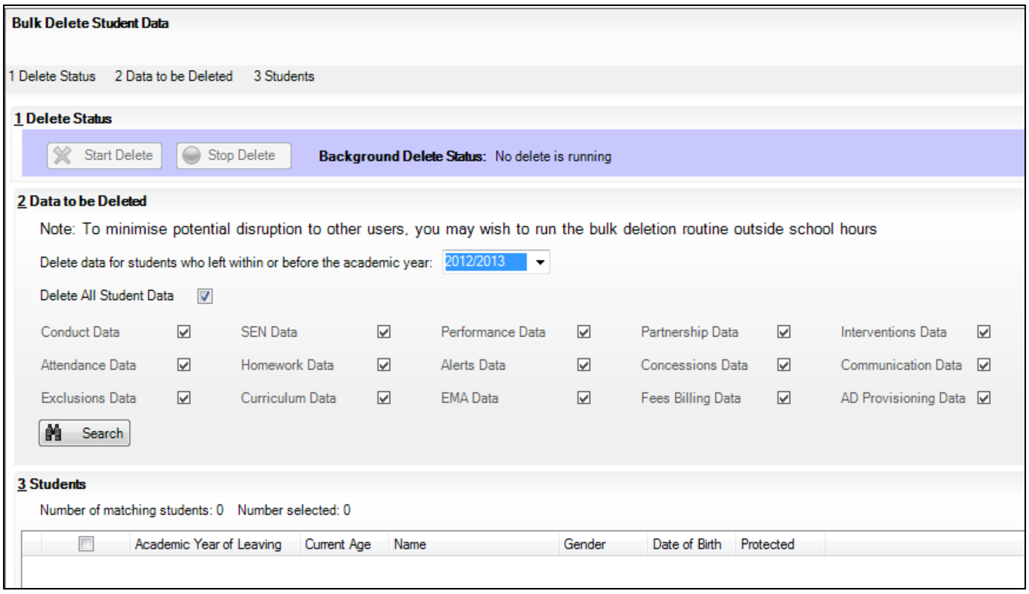
Deleting Pupil/Student Information in Bulk

To assist schools in being GDPR compliant, a school can bulk delete pupil/student data in line with its data retention policies.

Individual pupil/students can be protected from bulk deletion by selecting the **Protect from Bulk Data Deletion** check box in the **Basic Details** panel of the **Pupil** (or **Student**) **Details** page (please see *Adding/Editing Basic Details* on page *170*). Multiple pupil/students can be protected from bulk deletion using the Bulk Update routine (please see *Updating Pupil/Student Information in Bulk* on page *251*).

It is possible to run bulk delete in the background. However, you are strongly advised against running the routine at the same time as running any other process-intensive activities on the SIMS SQL Server (e.g. Database Diagnostics, Validate Memberships, etc.).

1. Select **Routines | Pupil** (or **Student**) **| Bulk Delete Pupil** (or **Student**) **Data** to display the **Bulk Delete Pupil** (or **Student**) **Data** page.



2. In the **Data to be Deleted** panel, select the required academic year from the drop-down list. Only academic years from over three years in the past can be selected.

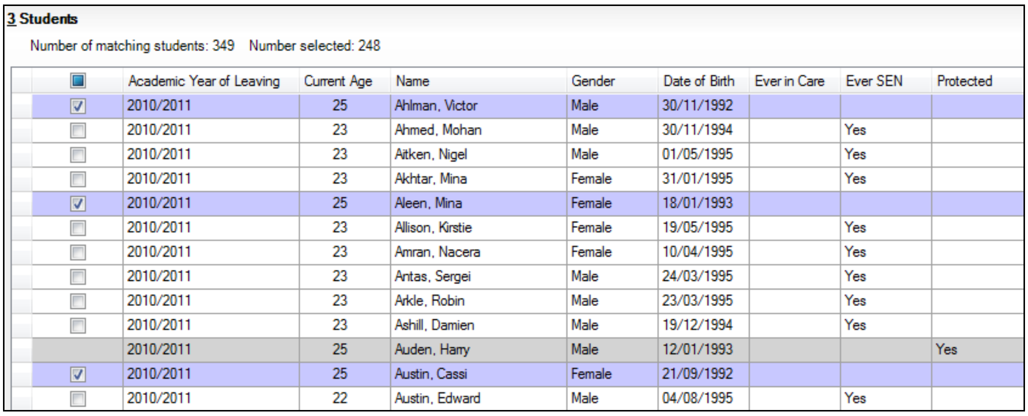
> *NOTE: If a school does not have over three years of pupil/student data, no academic years are displayed in the drop-down list.*

3. Select the **Delete All Student Data** check box, if this is your preferred option. All data relating to the pupil/student will be deleted, including any application data.

> *NOTE: Personal data for any student also recorded as an Employee, Contact, Enquirer, Agent and/or Bill Payer will be retained.*

4. Alternatively, select the check box of the data area(s) that you would like to delete, e.g. **Conduct Data**, to enable the **Search** button.

5. Click the **Search** button to display the relevant pupil/students in the **Pupil (or Student)s** panel.



3 Students

Number of matching students: 349   Number selected: 248

	Academic Year of Leaving	Current Age	Name	Gender	Date of Birth	Ever in Care	Ever SEN	Protected
☑	2010/2011	25	Ahlman, Victor	Male	30/11/1992			
☐	2010/2011	23	Ahmed, Mohan	Male	30/11/1994		Yes	
☐	2010/2011	23	Aitken, Nigel	Male	01/05/1995		Yes	
☐	2010/2011	23	Akhtar, Mina	Female	31/01/1995		Yes	
☑	2010/2011	25	Aleen, Mina	Female	18/01/1993			
☐	2010/2011	23	Allison, Kirstie	Female	19/05/1995		Yes	
☐	2010/2011	23	Amran, Nacera	Female	10/04/1995		Yes	
☐	2010/2011	23	Antas, Sergei	Male	24/03/1995		Yes	
☐	2010/2011	23	Arkle, Robin	Male	23/03/1995		Yes	
☐	2010/2011	23	Ashill, Damien	Male	19/12/1994		Yes	
	2010/2011	25	Auden, Harry	Male	12/01/1993			Yes
☑	2010/2011	25	Austin, Cassi	Female	21/09/1992			
☐	2010/2011	22	Austin, Edward	Male	04/08/1995		Yes	

6. Only pupil/students who are not marked as **Ever In Care**, **Ever SEN** or **Protected** are selected by default.

   The **Ever SEN** column indicates whether the pupil/student:

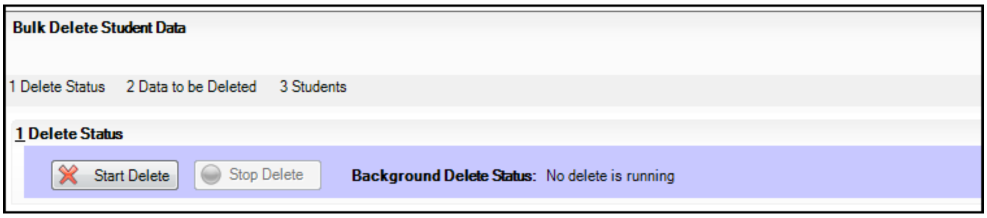
   - has ever been recorded as having a special educational need; and/or
   - has a More Able/Talented record.

   The link between this column and the More Able/Talented record will be removed in a future release.

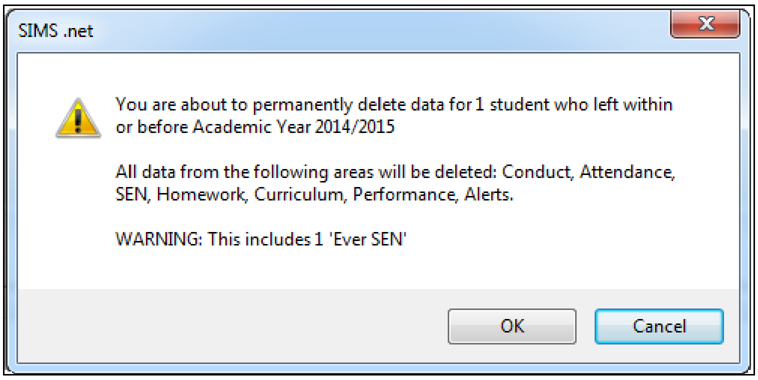
   Pupil/students with a **Yes** displayed in the **Protected** column cannot have data deleted.

   Pupil/students with a **Yes** displayed in the **Ever In Care** or **Ever SEN** columns must be intentionally selected to avoid accidental data deletion of In Care or SEN pupil/students.

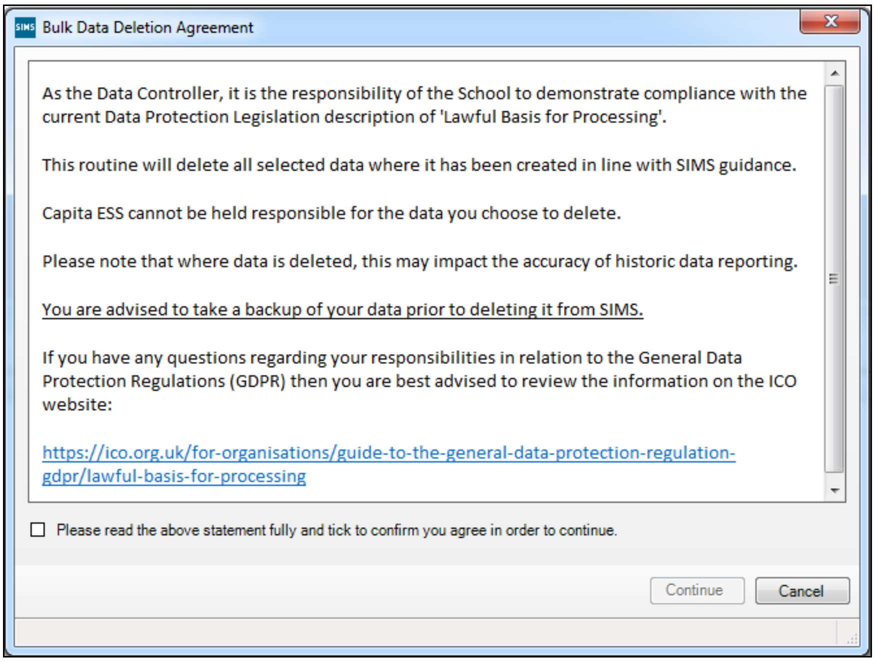
7. Select and deselect the check boxes adjacent to the relevant pupil/students. It is possible to select or deselect all pupil/students via the check box in the column header.
8. Click the **Start Delete** button in the **Delete Status** panel.



A confirmation message is displayed.



9. If you have selected any Ever In Care or Ever SEN pupil/students, an additional warning is displayed. Click the **OK** button to continue with the deletion and display the **Bulk Data Deletion Agreement**.



10. Ensure that you read and understand the agreement. Select the check box then click the **Continue** button to begin the deletion. Stop the deletion at any time by clicking the **Stop Delete** button.

    Deletion occurs on a student by student basis, deleting all data from the selected data areas for an initial pupil/student before moving on to the next. If you click the **Stop Delete** button, the deletion will stop when it has finished deleting all selected data areas for the pupil/student in progress.

11. When the deletion process has completed successfully, click the **OK** button on the confirmation dialog.

Deleting Unlinked Persons from SIMS

Unlinked persons must be deleted from SIMS. These may be applicants, agents, pupils, employees, contacts or other individuals whose historical personal data should no longer be retained in line with GDPR guidelines. Unlinked persons could still be present because at the time of deletion, a secondary role for the individual may have existed within SIMS.

1. Select **Tools | Housekeeping | Delete Unlinked Persons** to display the **Delete Unlinked Persons** page.

   All unlinked persons recorded in SIMS are displayed.

   > ***IMPORTANT NOTE:*** *To assist schools in being GDPR compliant, you are strongly advised to delete all unlinked persons identified by this routine.*

2. Select the check box at the top of the left-hand column to highlight all the unlinked persons records.
3. Click the **Delete** button.

   This process may take several minutes to complete.
4. Confirm the deletion by clicking the **Yes** button.

08| Editing Historical Pupil/Student Information

Introduction

There may be occasions when you need to edit historical information recorded against a specific pupil/student. For example, a pupil/student may have changed registration groups before it has been possible to record the change within SIMS.

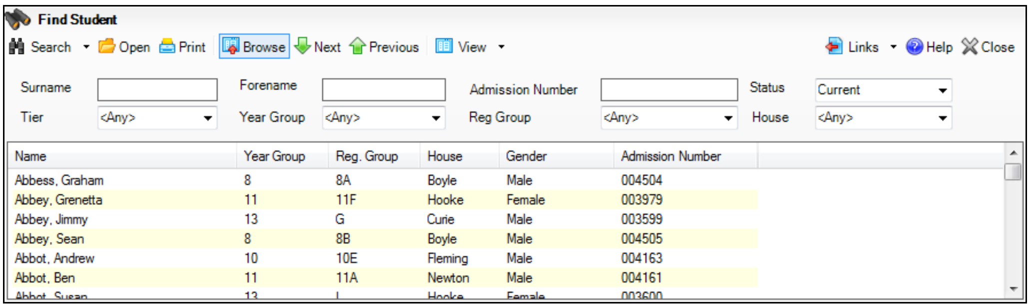
If the change is made in the **Registration** panel, then the registration group membership is changed as from today. It is therefore necessary to edit the historical data for that pupil/student so that it can be seen exactly when their membership of the new registration group began.

It is currently possible to:

- view any pupil/student name changes.
- view any changes of address.
- view/edit all aspects of pupil/student registration.
- view/edit ethnic/cultural data such as ethnicity, ethnic data source, etc.

Historical data is edited from the pupil/student record which is accessed as follows:

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Pupil** (or **Student**) browser.



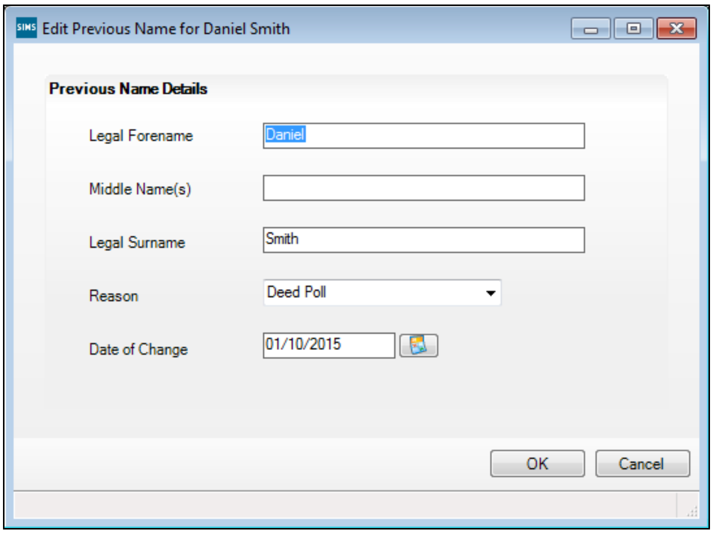
2. Search for and then select the required pupil/student. The **Pupil** (or **Student**) **Details** page is displayed.

Viewing/Editing Name Changes

Whenever a change is made to a pupil/student's surname or forename, it is automatically recorded as historical data. It is possible to view or edit this information, and to also manually enter any name changes that may, for example, have occurred before the pupil/student joined your school.

1. Click the **Basic Details** hyperlink to display the **Basic Details** panel.
2. Click the **History** button to display the **Previous Names for [Name]** dialog.

3. Any existing name changes are shown. To view or edit the details, highlight the name, then click the **Open** button to display the **Edit Previous Name for [Name]** dialog.



4. Make any required changes and select the **Reason** for the change from the drop-down list, e.g. **Deed Poll**.
5. The **Date of Change** defaults to today's date and should be changed by clicking the **Calendar** button and selecting the required date.
6. Click the **OK** button twice then click the **Save** button on the toolbar to save any name changes.

Viewing Changes of Address

Any changes made to a pupil/student's address are automatically recorded in their history and can be viewed as follows:

1. Click the **Addresses** hyperlink to display the **Addresses** panel.
2. Click the **History** button to display the **Preview Addresses for [Name]** dialog.

3. Click the **OK** button to close the dialog.

Viewing/Editing Historical Registration Data

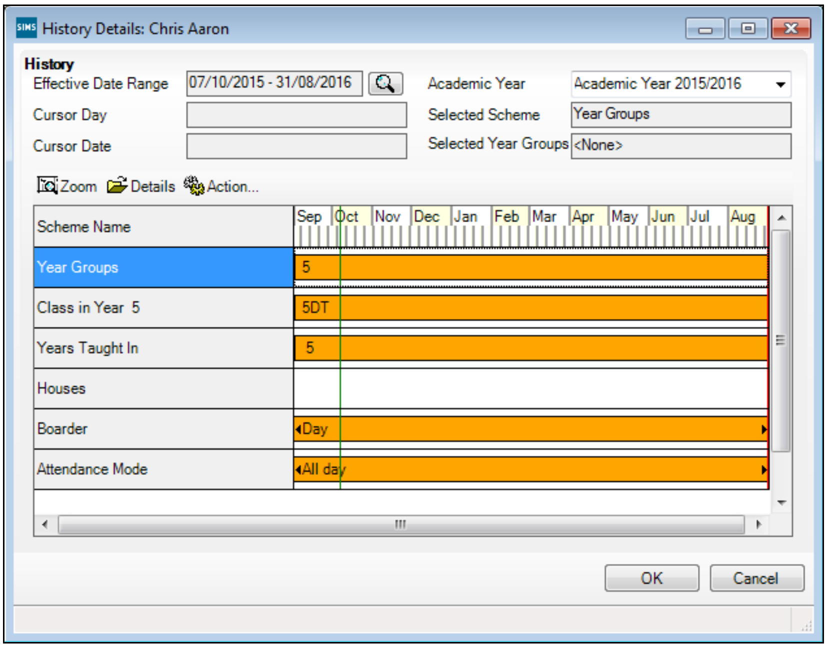
Once pupil/students have been admitted into the school, they generally remain in the same Year Group and Registration Groups/Classes for the entire academic year.

There may be occasions when this is not practical and some pupil/students may need to be allocated to different Year Groups and Registration Groups/Classes part way through the academic year. Sometimes, behaviour issues may cause friction in a registration group and the easiest way to manage this would be to move one of the misbehaving pupil/students away from other troublemakers.

To enable Pastoral Managers to deal with these occasions, the ability to allocate pupil/students retrospectively to other Year Groups and Registration Groups/Classes has been provided. Select the **Registration Group Scheme Name** from the **History Details** dialog.

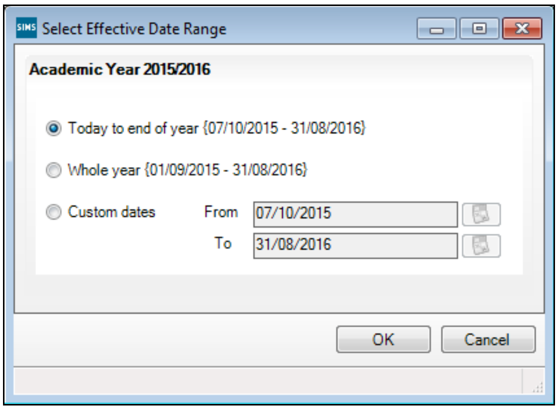
1. Click the **Registration** hyperlink to display the **Registration** panel.

2. Click the **History** button to display the **History Details** dialog.



Selecting the Academic Year and Effective Date Range

1. The **Effective Date Range** defaults to today's date to the end of the current academic year. Change the date range by clicking the adjacent **Browser** button to display the **Select Effective Date Range** dialog. The date range should be the date that you want to apply any change to.
2. If required, select a different **Academic Year** from the drop-down list. The **Effective Date Range** defaults to the dates for that academic year.



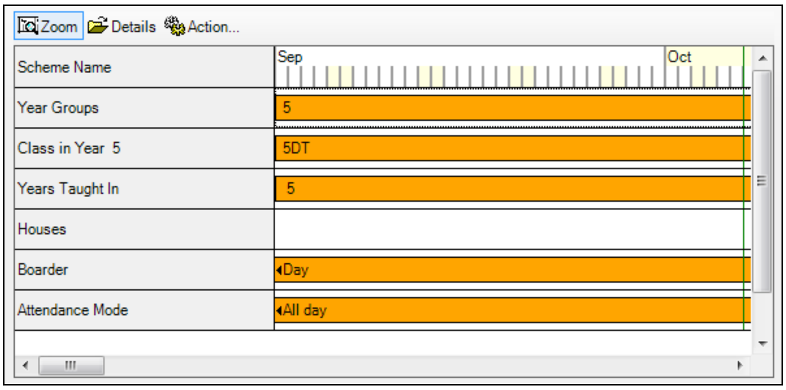
3. Select the required radio button. If the **Custom dates** radio button is selected, you need to enter **From** and **To** dates or click the **Calendar** button and select the required dates. Click the **OK** button to confirm your selection.

Viewing Registration Data

Beneath the **Effective Date Range** field there are two additional fields entitled **Cursor Day** and **Cursor Date.** The data displayed in these fields display the day and date highlighted as the cursor is moved backward and forward along the calendar. This can be useful when information in the screen changes, e.g. a change in registration group, and you want to see the exact date that this change was made.

NOTE: The effective date is shown with a green vertical line indicating the start and a red vertical line indicating the end.

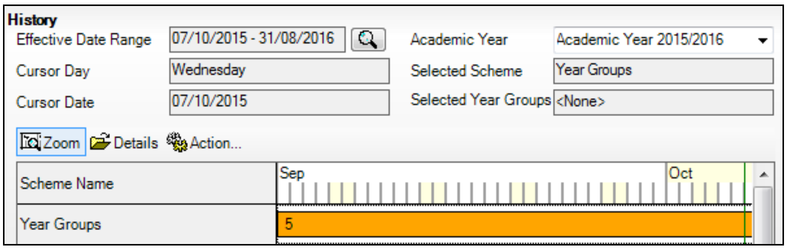
If required, click the **Zoom** button to increase the size of the months displayed in the grid.



The **Scheme Name** column lists the various groups of data that can be viewed or edited. These include:

- Year Groups
- Class/Reg Group in Year
- Years Taught In
- Houses
- Boarder
- Attendance Mode

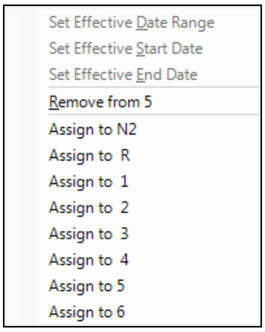
Clicking each row, e.g. **Year Group** displays relevant information in the **Selected Scheme** and **Selected Year Groups** fields as shown in the following graphic:

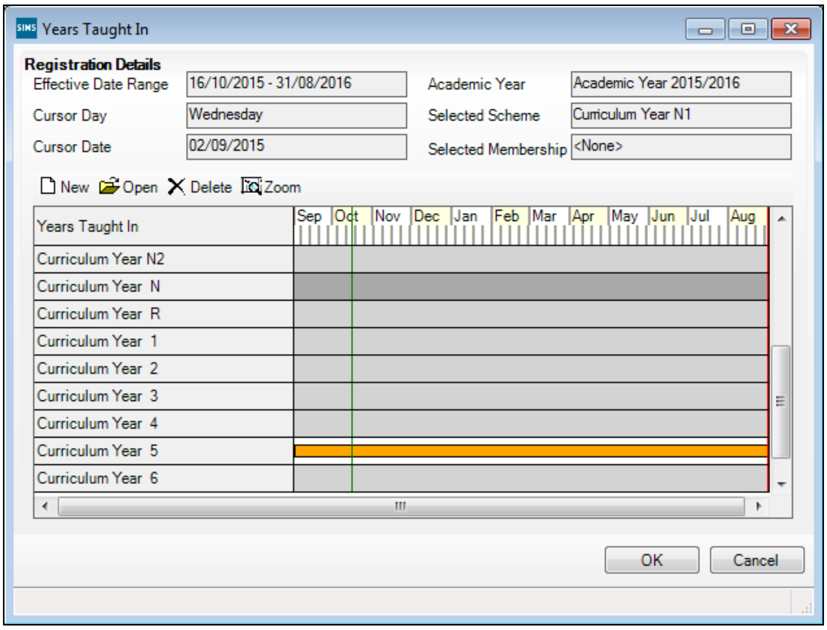


Editing Registration Data

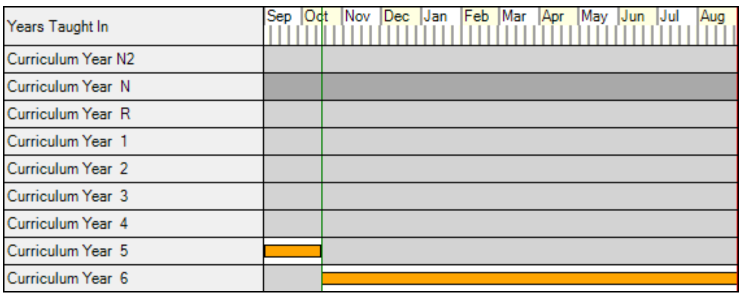
The method of editing each 'scheme' is the same. The following example describes how to edit a pupil/student's Year Taught In.

1. Ensure that the required academic year and effective date have been selected (please see *Selecting the Academic Year and Effective Date Range* on page *262*).
2. Select **Years Taught In** in the **Scheme Name** column.
3. Click the **Action** button to view a drop-down list of options.

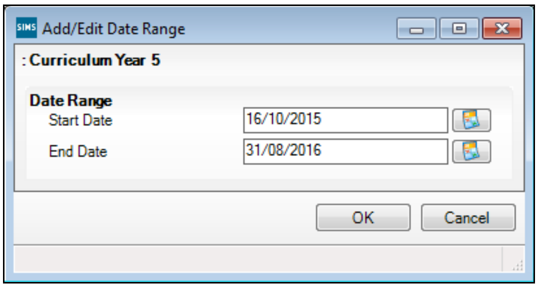




4. Click the required **Curriculum Year** heading in the **Years Taught In** column (using the scroll bars if necessary), then click the **New** button to make the change.



5. Alternatively, double click the new **Curriculum Year** bar to display the **Add/Edit Date Range** dialog. Edit the dates if required.



6. If you have made a mistake, highlight the required orange block and click the **Delete** button.
7. Click the **OK** button to confirm any changes then click the **Save** button on the toolbar to save the pupil/student record.

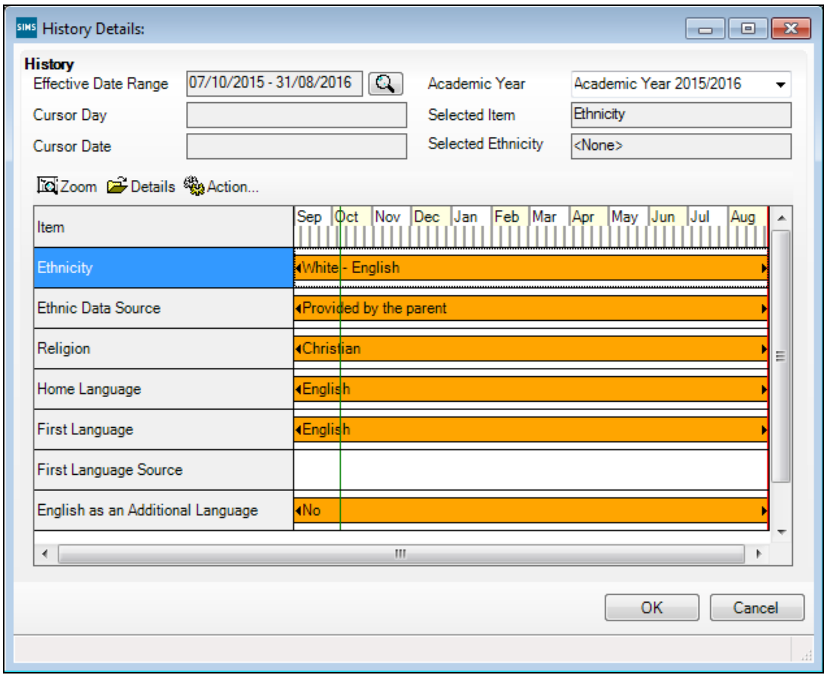
Editing Historical Ethnic/Cultural Information

Editing ethnic/cultural historical data can be useful if you have inaccurately recorded a pupil/student's ethnicity, for example, and wish to correct it back to when the information was first entered. The following information can be edited:

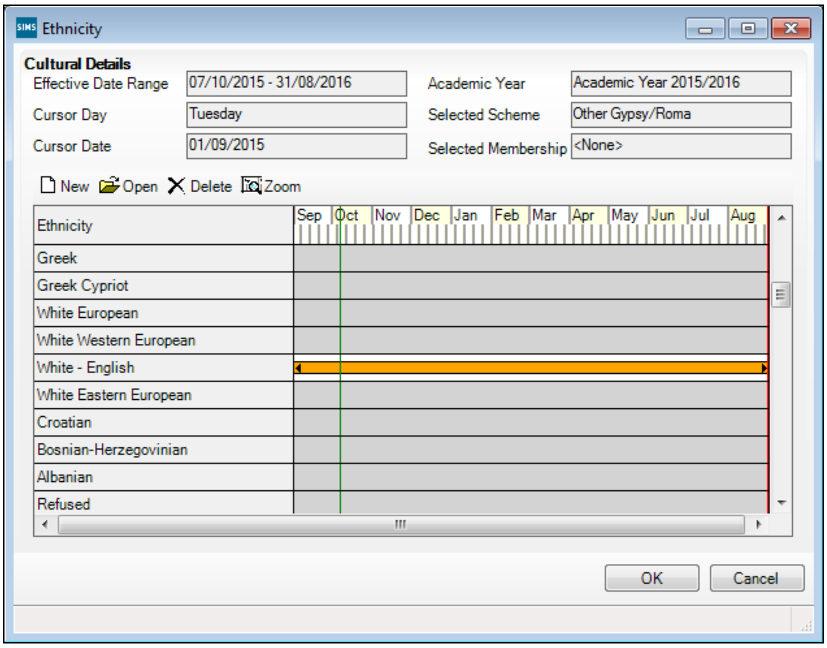
- Ethnicity
- Ethnic Data Source (except Northern Ireland)
- Religion
- Home Language
- Mother Tongue (except Northern Ireland)
- English as an Additional Language

1. Click the **Ethnic/Cultural** hyperlink to display the **Ethnic/Cultural** panel.

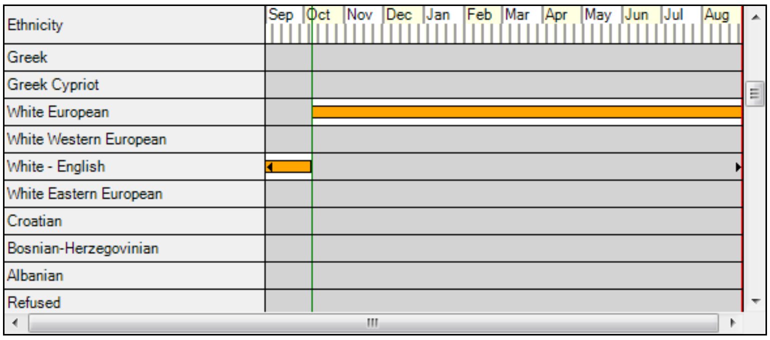
2. Click the **History** button to display the **History Details** dialog.



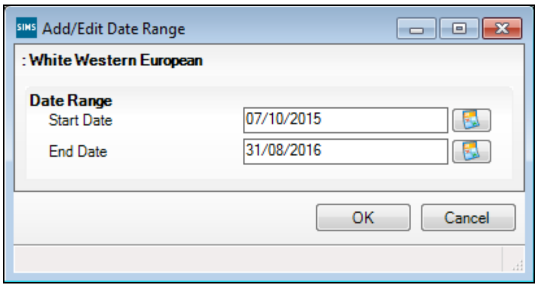
3. Ensure that the required academic year and effective date have been selected (please see *Selecting the Academic Year and Effective Date Range* on page *262*).
4. Select **Ethnicity** in the **Scheme Name** column.
5. Click the **Details** button to display the **Ethnicity** dialog. If necessary, scroll down to identify the current ethnicity. Alternatively, click the **Action** button to view a drop-down list of options including the ethnicities that can be selected.



6. Click the required Ethnicity heading in the **Ethnicity** column (using the scroll bars if necessary), then click the **New** button to make the change.



7. Alternatively, double click the orange bar to display the **Add/Edit Date Range** dialog. Edit the dates as required.



8. If you have made a mistake, highlight the required orange block and click the **Delete** button.

9. Click the **OK** button to confirm any changes the click the **Save** button on the toolbar to save the pupil/student record.

09| Managing Applications to your School

Introduction

This section describes how to record and manage any applications to your school. Once an applicant has been added to SIMS, the application can changed according to its status (including **Applied**, **Offered**, **Accepted**, **Admitted**, **Rejected** or **Withdrawn**) as applicable. The status can be changed for individual applicants or applied in bulk.

Before using the admissions process, it is important to set up admissions parameters and create admission groups into which applicants can be added. This enables the status of applications to be changed in bulk.

Additional Resources:

Setting Up and Administering SIMS handbook

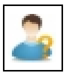
Recording a New Applicant

There are several ways in which an applicant can be added to SIMS:

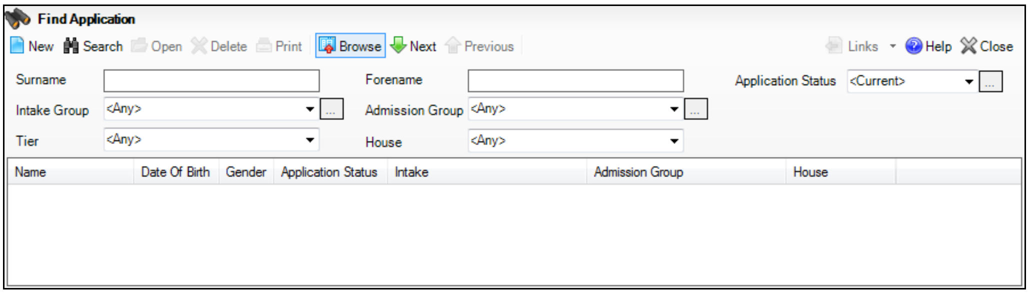
- Manual entry via the keyboard.
- Importing via CTF (although some details will usually have been entered into SIMS before the CTF is imported).
- Importing an application XML file, if applicable.

This section describes how to manually enter an applicant into SIMS together with the completion of their mandatory information.

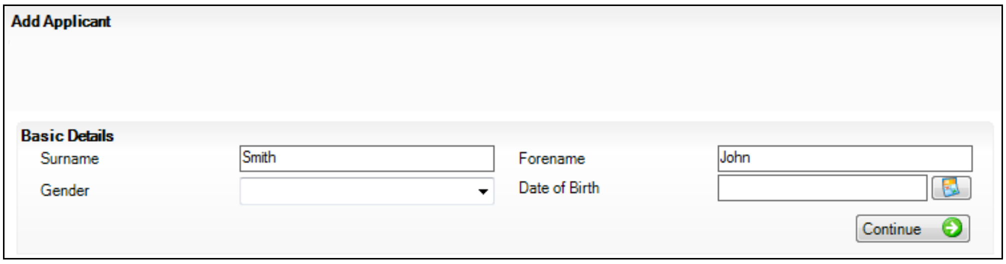
1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.



Application icon



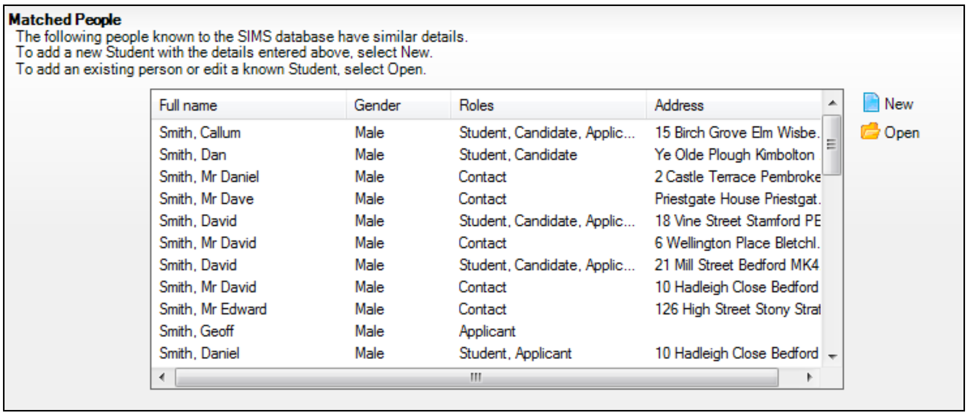
2. Click the **New** button to display the **Add Applicant** page with the **Basic Details** panel displayed. This panel is used to enter basic information to check that the applicant does not already exist in SIMS.



3. Enter any combination of the **Surname** (mandatory), **Forename** and **Date of Birth** and/or select the **Gender** from the drop-down list and then click the **Continue** button.

> *NOTE: It is important to ensure that surnames and forenames are spelt correctly at this point to ensure that any matching existing records are identified thus avoiding duplicates being created. If you are unsure, enter partial Surnames/Forenames as required.*

- If no existing applicants are found, the remainder of the **Application** page is populated with the details just entered. Mandatory fields are highlighted in red. Complete the basic details (please see *Completing Basic Details* on page *272*).
- If the applicant details are similar to an existing person in SIMS, a **Matched People** panel is displayed showing the possible matches.

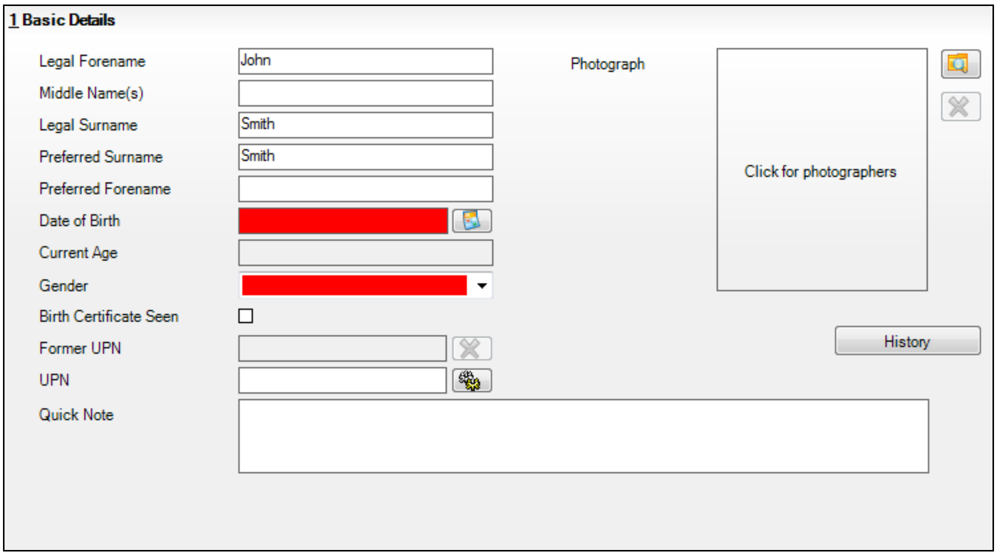


> *NOTE: The **Matched People** panel displays a list of all **people** in the system which includes staff, contacts, agents, etc. If you think the applicant already exists, check that the **Role** is **Student, Applicant**. The sort order of the display can be changed by clicking the required column heading.*

- If the applicant does not appear in the list, click the **New** button to create a new record populated with the search information previously entered. Complete the basic details *(please see Completing Basic Details on page* 272*).*
- If the required applicant appears in the list, highlight their name and click the **Open** button to edit their details.

Completing Basic Details

Once a new record has been created, the **Basic Details** panel is populated with the search information entered in the previous step. Any incomplete mandatory fields are displayed in red.



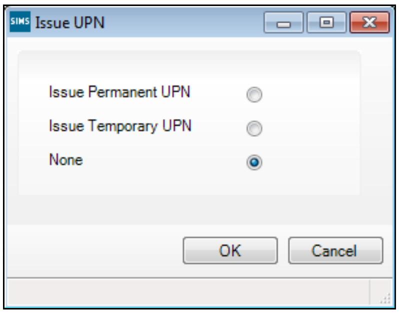
1. Complete any remaining name fields such as **Middle Name(s)**.
2. Enter the **Date of Birth** (mandatory) if not already completed or click the **Calendar** button and select the required date. The **Current Age** is calculated automatically as the date of birth is entered.

 *Calendar button*

3. Select the **Gender** from the drop-down list if not already completed.
4. Select the **Birth Certificate Seen** check box if applicable.
5. Enter the UPN in the **UPN** field if known. If required, a UPN can be issued by clicking the **Generate UPN** button.

 *Generate UPN button*

The **Issue UPN** dialog is displayed. Select the applicable radio button, then click the **OK** button (the UPN is generated when the record is saved).



Issue Permanent – Permanent UPNs are issued to an applicant only when it is believed that they have never previously been allocated a UPN or to replace a temporary UPN.

Issue Temporary – Temporary UPNs are issued to applicants only when a school does not know the permanent UPN (e.g. awaiting transfer file/applicant's information).

Recording a Quick Note

There may be occasions when you wish to add an important note that appears in the **Basic Details** panel. This ensures that any user (who has applicable permissions) accessing the pupil/student's record, sees the note.

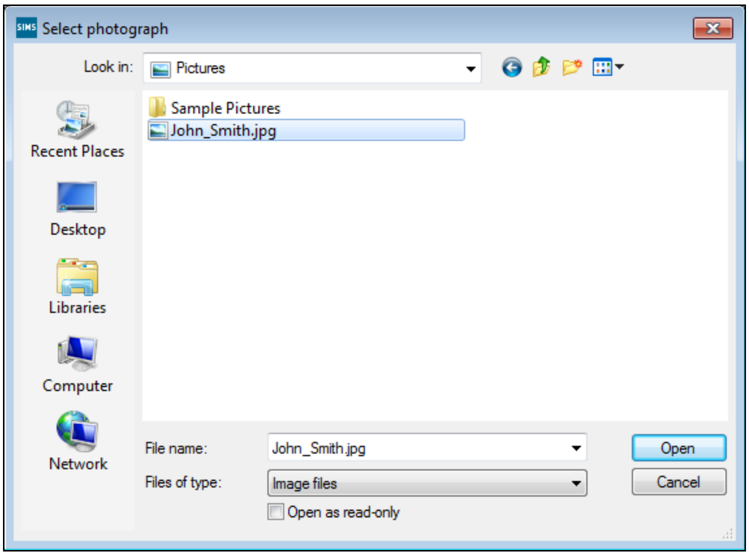
Enter the required text in the **Quick Note** field.

Attaching a Photograph

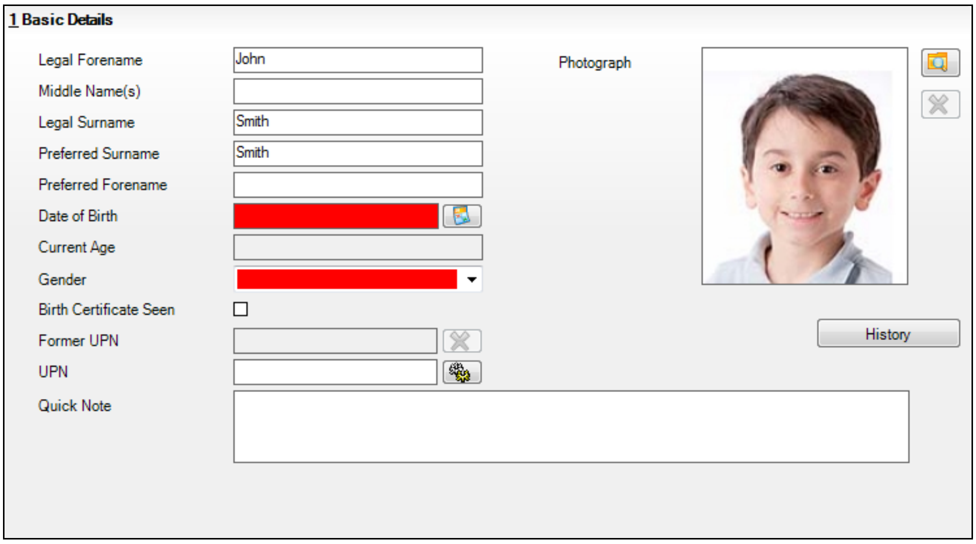
1. If you have an electronic copy of the applicant's photo, this can be attached to the record by clicking the **File Browser** button to the right of the **Photograph** field.

 *File Browser button*

The **Select Photograph** dialog is displayed.



2. Navigate to and select the required photograph, then click the **Open** button. The selected photograph is displayed in the **Basic Details** panel as shown in the following example.

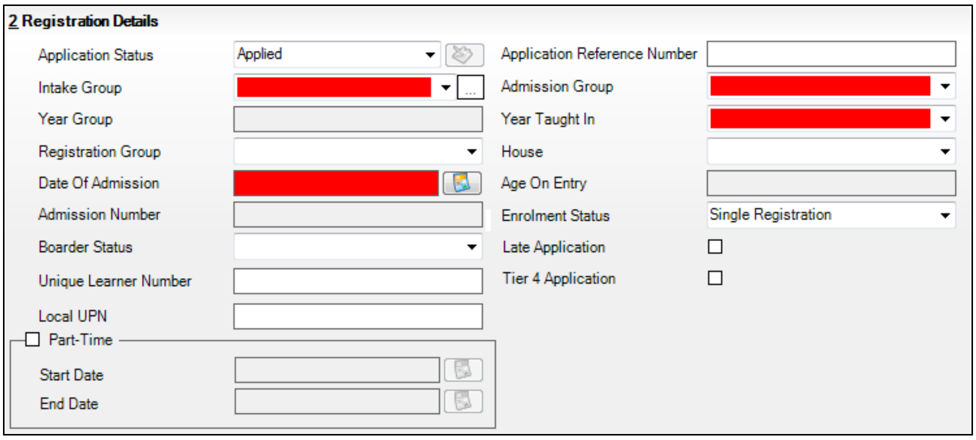


Adding/Editing Previous Names

It is possible to add or edit an applicant's previous names (please see *Correcting/Removing a Pupil/Student's Previous Name* on page *174*).

Completing Registration Information

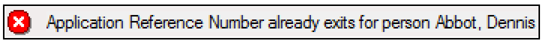
1. Click the **Registration** hyperlink to display the **Registration** panel. Red fields indicate mandatory information.



2. The **Application Status** defaults to **Applied**. Amend the status if required, e.g. to **Offered**.
3. The **Application Reference Number** is only applicable to English Own Admission Authority schools and Independent schools.

   In English Own Admission Authority schools, an ARN is given to applicants imported via ATF or ADT files; this field is read-only.

Independent schools can record and edit the **Application Reference Number** (ARN) of the prospective student. If the ARN already exists in the system, the following warning message will be displayed on the Status Bar.



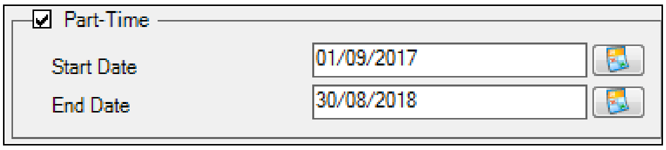
4. Select the **Intake Group** (mandatory) and the **Admission Group** into which the applicant will be placed, from the appropriate drop-down lists. The **Year Group**, **Date of Admission** and **Age On Entry** are automatically populated based on the information recorded for the selected intake/admission group.
5. Select the **Year Taught In** from the drop-down list.
6. If known at this stage, select the **Class** and **House** (if applicable) into which the applicant will be admitted.
7. The **Enrolment Status** defaults to **Single Registration**, but can be changed by selecting any of the following values from the drop-down list:
   - **Single Registration**- a normal, full-time pupil/student who is registered only at your school.
   - **Guest Pupil**- a pupil/student who attends your school for some of their lessons, but predominantly attends their main school. Guest pupil/students are not registered at your school and do not have an admission number.
   - **Main-Dual Registration**- a pupil/student who is also registered at another school for some of their timetable, but the majority of their time is spent at your school.
   - **Subsidiary-Dual Registration**- a pupil/student who is also registered at another school for the majority of their timetable and only a minority of their time is spent at your school.
8. Select the **Boarder Status** (if applicable) e.g. **Not a Boarder** or **Boarder, night not specified** from the drop-down list.
9. If this is a late application, select the **Late Application** check box. This allows Own Admissions Authority schools with a full licence to identify late applications and if they wish, omit late applications when recording data for an ASL file.
10. Select the **Tier 4 Application** check box if you wish to mark this record as such. For this check box to be visible, the functionality must be enabled via **Tools | Admission | Defaults**. Once selected, Tier 4 Application records are indicated in the **Find Application** browser.

IMPORTANT NOTE: *When creating an application for a prospective student that is linked to an agency, or contact (e.g. parent) (via the* ***Application*** *icon on the toolbar or* ***Focus | Admission | Application****), the recorded tier 4 application information is transferred automatically from agency's record to application's record.*

11. Complete the **Local UPN** of the prospective pupil/student.

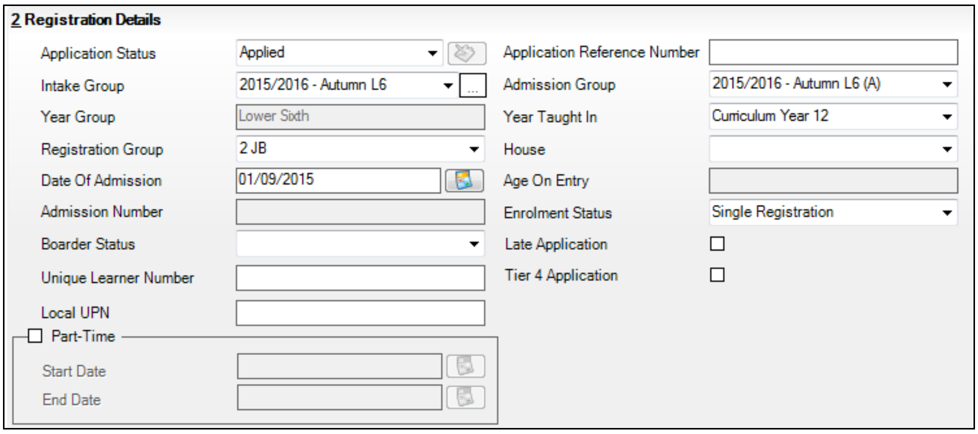
IMPORTANT NOTE: *When adding a **Local UPN** to an application record (via the **Application** icon on the toolbar or **Focus | Admission | Application**), the **Local UPN** is transferred to the pupil/student's main record on the date they are actually admitted to the school.*

12. If the applicant will be attending school on a part time basis, select the **Part-Time** check box.



13. The **Start Date** must be entered and **End Date** can be completed if known.

NOTE: Part-time attendance is usually only applicable to nursery school children, but is permitted for all ages and is considered to be anything less than 10 sessions per week. It refers to part-time in education, <u>not</u> part-time in one or more establishments.



Setting up the Early Years Attendance Patterns for an Applicant

Applicable to English Primary schools or Independent schools with a Nursery provision

Parents are now entitled to receive 15 hours of free nursery provision per week, which can be taken over a minimum of three days. They can choose to take as much or as little of the 15 hours as they like, and use their entitlement at more than one nursery provider.

An Early Years Attendance Pattern can be defined for applicants (regardless of their status, e.g. **Applied**, **Offered**, etc.). However, the attendance pattern only becomes effective when the applicant is admitted. The effective date (**Start Date**) for the attendance pattern is automatically assigned as the pupil's date of arrival.

This routine enables your school to set up an early years attendance pattern for any applicant but typically two, three and four year olds. Defining a weekly attendance pattern for a pupil does not have any impact on the recording of attendance. It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and PM, that the provisions defined in the attendance patterns).

Additional Resources:

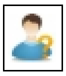
Managing Pupil/Student Attendance handbook

The periods of nursery care provision that are available to parents, e.g. Mornings Only Nursery Care, must have previously been defined via **Tools | Setups | Attendance Setup | Early Years Provisions Setup**.

Additional Resources:

Managing Pupil/Student Attendance handbook

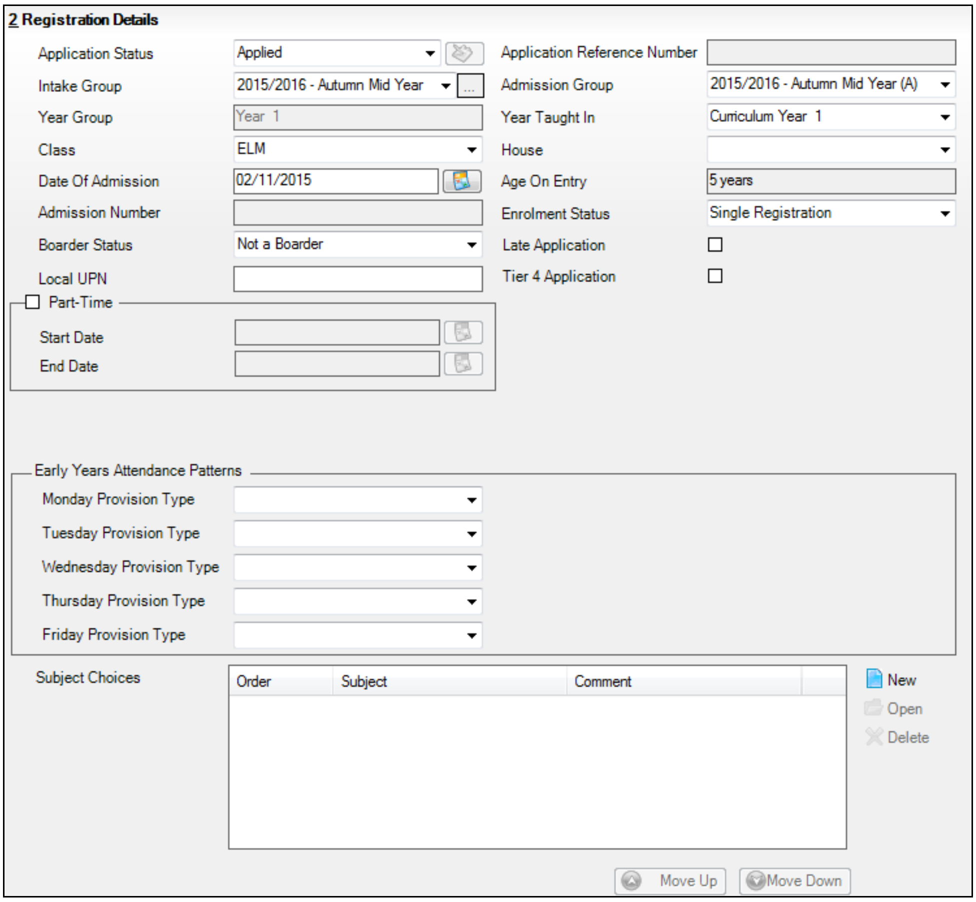
1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.



Application icon

2. Search for, then open the required applicant's record to display the **Application:** page.

3. Click the **Registration Details** hyperlink to display the **Registration Details** panel.



4. Specify the **Early Years Attendance Patterns** by selecting the required provision type for each day of your school's working week from the drop-down list. For example, **Provision 1** (a.m. nursery care) Monday to Friday with the exception of Wednesdays when **Provision 3** (p.m. nursery care) is provided.

5. Click the **Save** button to retain the Early Years Attendance Pattern for that pupil.

It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and PM, that the provisions defined in the attendance patterns).

Additional Resources:

Managing Pupil/Student Attendance handbook

Adding/Editing Subject Choices

You can view the **Subject Choices** table, if you select the respective check box on the **Setup Details** page (via **Tools | Admissions | Defaults**).

1. Click the **New** button adjacent to the **Subject Choices** table to display the **Add/Edit Applicant Subject Choices** dialog.
2. The **Ranking** determines the order in which the subjects will be displayed in the Subject Choices table.
3. Select the **Subject Choice** from the drop-down list.
4. Click the button adjacent to the **Subject Choice** drop-down list to display both active and inactive subject choices. Inactive subject choices are displayed in the **Unusual Value Text Colour**, as defined on **Customisation Options** page (via **Tools | Setups | User Options**).
5. Add any relevant **Comment**.
6. Click the **OK** button to return to the **Application** page.

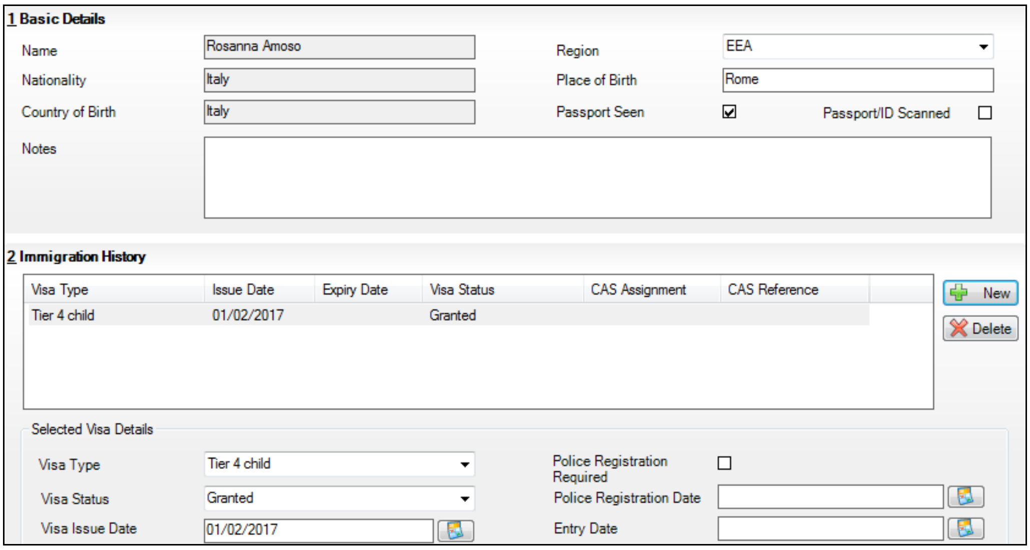
Recording Tier 4 Application Information

The Tier 4 functionality, which handles applications from international pupil/students, is enabled via the **Setup Details** page (**Tools | Admissions | Defaults**). Once enabled, a Tier 4 Application record can be created. A **CAS Reference** (Confirmation of Acceptance for Studies) can also be recorded. If this functionality is not enabled, it is not possible to record this information.

An application's **CAS Reference** can be recorded in SIMS, to comply with the UK Border Agency's traceability requirement to link a CAS Reference with a VISA number. Once entered, this information is also available from the **Links** panel on the **Pupil** (or **Student**) **Details** page (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**), from where it can be edited.

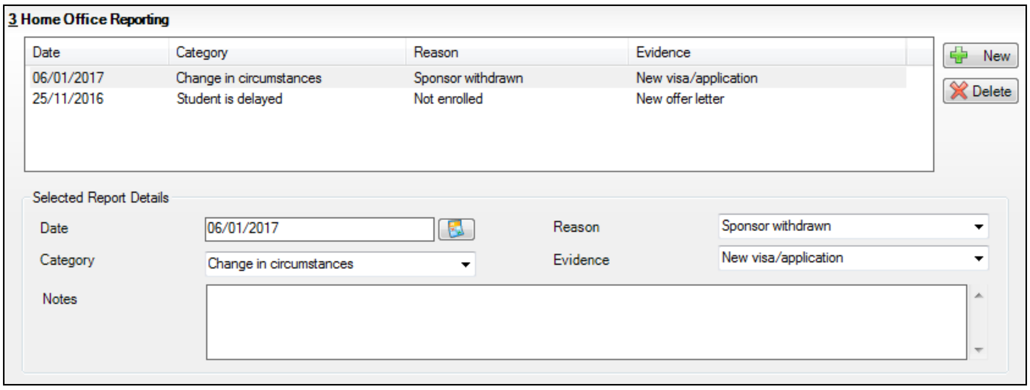
Only schools that accept international pupil/students (requiring a VISA) need to manage these applications.

1. Click the **Tier 4 Details** link in the **Links** panel on the right-hand side of the page to display the **Tier 4 Details** page.



2. The pupil/student's **Name**, **Nationality** and **Country of Birth** are populated automatically and cannot be amended.
3. Select the **Region** of the country of birth (e.g. **EEA** for Italy or **International** for China) from the drop-down list and enter the **Place of Birth**.
4. If applicable, select the **Passport Seen** and **Passport/ID Scanned** check boxes and enter any **Notes**.
5. In the **Immigration History** panel, click the **New** button to create a new Visa record. Alternatively, select an existing record to view its details in the **Selected Visa Details** and **Selected CAS Details** panels. Click the **Delete** button to delete a record.
6. Enter the **Visa Type** (mandatory) and any other Visa and CAS information in the relevant fields. Select the **Police Registration Required** and **BRP/Visa Seen** check boxes, if applicable.

7. Schools are required to report any changes in the situation of a Tier 4 pupil/student (e.g. a Visa change or a new course) to the Home Office. These changes can be recorded in the **Home Office Reporting** panel. Click the **New** button to create a new report. Alternatively, select a report to view or edit its details in the **Selected Report Details** panel. A report can be deleted by highlighting it and clicking the **Delete** button.



8. Select the **Date** of the change from the Calendar.
9. Select the type of change in situation from the **Category** drop-down list (e.g. **Change in circumstances**) and the **Reason** for the change (e.g. **Student withdrawn**).
10. Select any **Evidence** of the changes (e.g. **New offer letter**) and enter any relevant **Notes**.
11. Click the **Save** button.

Additional Resources:

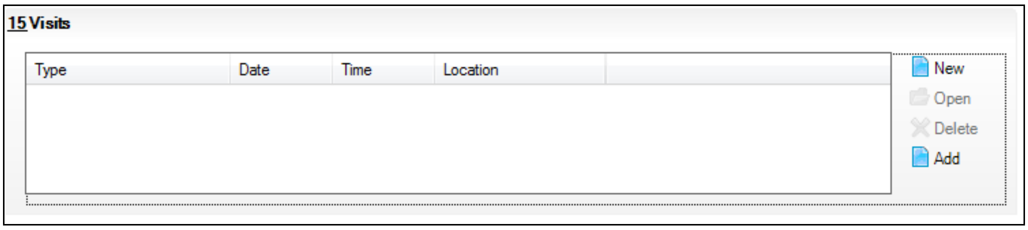
Setting up Admissions in the *Getting Started with Admissions 7* chapter of the *SIMS Admissions Code of Practice Own Admissions Authority Basic Licence* handbook, the *SIMS Admissions Code of Practice Own Admissions Authority Full Licence* handbook and the *SIMS Admissions for Independent Schools* handbook

More Information:
Completing Registration Information on page *274*

Recording Applicant Visit Details

Internal visits represent the entry into school of applicants and/or their parent/guardians. They can be added or edited from within the **Application** page, which is useful for setting up interviews for a single applicant pupil or for a group of applicants. Applicants can be associated with an existing visit or a new visit record can be created from the application record.

1. On the **Application** page, click the **Visits** hyperlink to display the **Visits** panel.

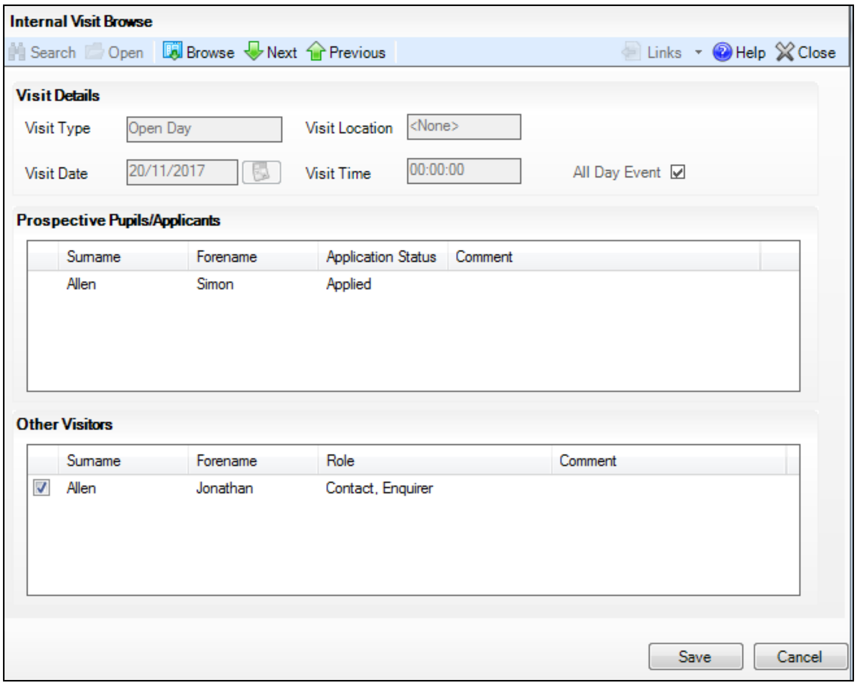


2. It is possible to record details of a visit that an applicant intends to make to your school. To add a record for a visit and associate the selected applicant with it, click the **New** button, then add the required details.

   It is also possible to associate the selected prospective pupil/student with an existing, scheduled interview or visit. To do this:

3. Click the **Add** button to display the **Visits-Applicants/Others** dialog.

> *TIP: To help distinguish between adding prospective pupils to a new visit and adding them to an existing visit record, hover over the **New** and **Add** buttons in the **Visits** panel.*



4. Using the **Internal Visit** browser, select the required search criteria, then click the **Search** button to display all visits recorded in SIMS that match the search criteria selected. Alternatively, leave the search criteria blank, then click the **Search** button to display details of all recorded visits.
5. Double-click the required visit to display its details. Details of the visit are displayed in read-only format in the **Visit Details** panel.

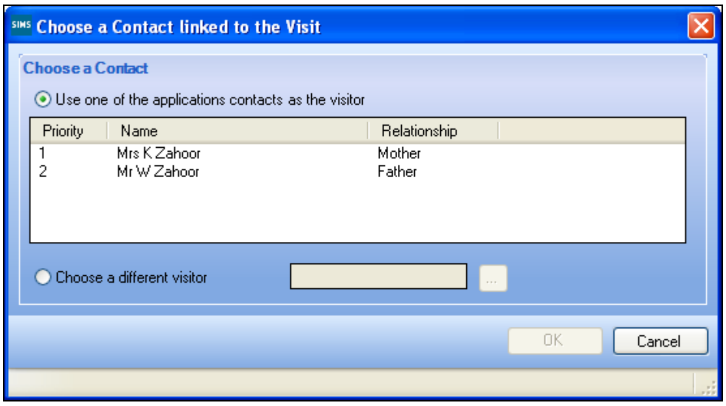
The selected **Prospective Pupils/Applicants** (the applicant) is added to the visit automatically and cannot be removed. Any **Other Visitors** (i.e. contacts of the applicant) are also displayed. Deselect any **Other Visitors** who will not be attending the visit by deselecting their check box.

6. Click the **Save** button to save the details and return to the **Application** page.
7. The applicant can be disassociated from the visit by highlighting the event in the **Visits** panel, then clicking the **Delete** button. Click the **Yes** button to confirm. If the applicant is the only person associated with this visit and you remove them from the event, you will be asked if you wish to delete the entire visit record.

Recording Details of a New Visit

Applicants can be associated with a new visit record, created from the **Application** page.

1. On the **Application** page, click the **Visits** hyperlink to display the **Visits** panel.
2. Click the **New** button to display the **Choose a Contact linked to the Visit** dialog.

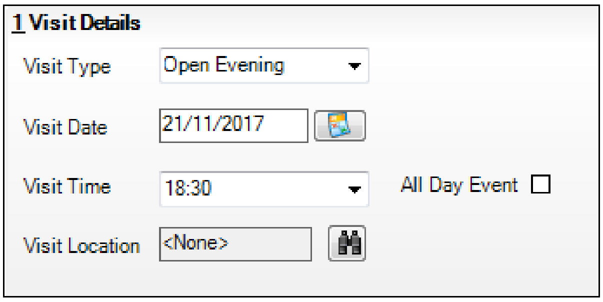


3. If the applicant contact you wish to add to the visit is displayed in the **Choose a Contact** panel, select the **Use one of the applications contacts as the visitor** radio button, highlight the required contact, then click the **OK** button to display the **Add/Edit Visits** dialog. Proceed to Step 4.

   If the applicant contact you wish to add to the visit is not displayed in the **Choose a Contact** panel, or you wish to select a different contact, select the **Choose a different visitor** radio button, then click the **Browser** button to display the **Select person** browser.

   a. From the **People** browser, enter the required search parameters, then click the **Search** button to find the required person.
   b. Highlight the required person, then click the **OK** button to return to the **Choose a Contact linked to the Visit** dialog, where the contact's name is displayed adjacent to the **Choose a different visitor** field.
   c. Click the **OK** button to display the **Add/Edit Visits** dialog.

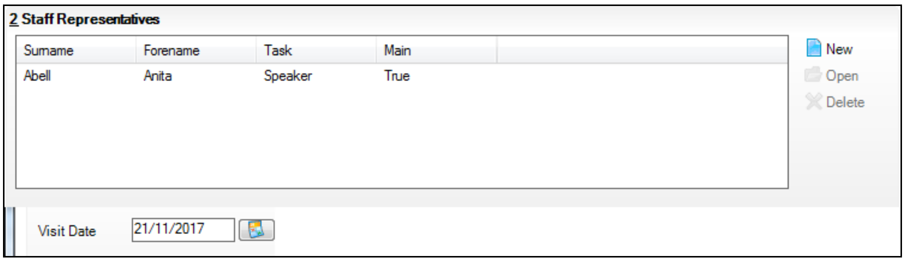
4. In the **Visit Details** panel, select the **Visit Type** from the drop-down list.



5. The **Visit Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting a different date.
6. Enter the **Visit Time** and select the **All Day Event** check box, if applicable.
7. To select the location for the visit, click the **Search** button adjacent to the **Visit Location** field to display the **Browse Internal Location** dialog.
   a. Click the **New** button and select a **Room** from the drop-down list. All existing rooms that have been defined through **Focus | School | Rooms** are displayed. The **Description** field is populated automatically.
   b. Click the **Save** button, then click the **OK** button to return to the **Add/Edit Visits** dialog.

Adding Staff Representatives

The **Staff Representatives** panel is used to add the members of staff you wish to attend the event.

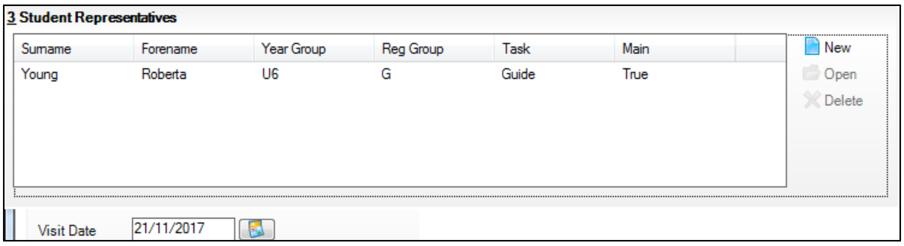


1. Click the **New** button to display the **Staff Representative** dialog.
2. Click the **Search** button to display the **Browse Staff Representatives** dialog.
3. Enter the staff member's **Surname**, **Forename**, **Previous Name** and/or their **Staff Code**. Alternatively, select their **Title**, **Gender**, **Status** or **Tier** from the drop-down lists.
4. Click the **Search** button to display staff members who match the search criteria entered.
5. Highlight the required member of staff, then click the **OK** button to return to the **Staff Representative** dialog, where the **Staff Member** field is populated.

6. Select the staff member's **Visit Task** from the drop-down list. This determines their role during the visit. The options available are **Interviewer**, **Guide** and **Speaker**. With the appropriate permissions, you can create specific values for this lookup through **Tools | Lookups | Maintain**. For more information, please refer to the *User Defined Groups/Fields, Lookups and Ethnic Codes* chapter in the *Setting up and Administering SIMS* handbook.
7. Click the **OK** button to return to the **Internal Visit Detail** dialog.
8. Repeat steps 1 to 7 to add staff representatives until they are all recorded.
9. Click the **Save** button to save the details.

Adding Student Representatives

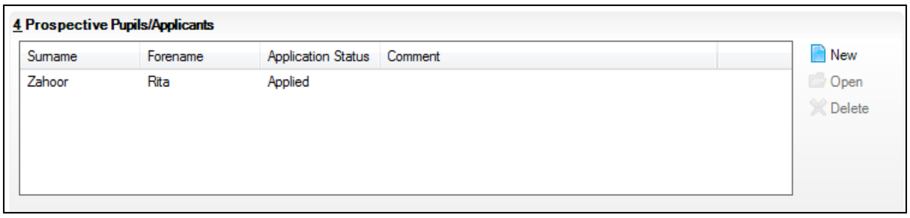
The **Student Representatives** panel is used to add the pupil/students you wish to attend the event.



1. Click the **New** button to display the **Student Representative** dialog.
2. Click the **Search** button to display the **Browse Student Representatives** dialog.
3. Enter the pupil/student's **Surname**, **Forename** or and/or **Admission Number**. Alternatively, select their **Tier**, **Year Group**, **Reg Group** or **House** from the drop-down lists.
4. Click the **Search** button to display student representatives who match the search criteria entered.
5. Highlight the required pupil/student's name, then click the **OK** button to return to the **Student Representative** dialog, where the **Student**, **Year Group** and **Reg Group** fields are populated.
6. Select the student representative's **Visit Task** from the drop-down list. This determines their role during the visit. The options available are **Interviewer**, **Guide** and **Speaker**.
7. Click the **OK** button to return to the **Internal Visit Detail** dialog.
8. Repeat steps 1 to 7 to add student representatives until they are all recorded.
9. Click the **Save** button to save the details.

Adding Prospective Pupils/Applicants

The **Prospective Pupils/Applicants** panel is used to add the prospective pupil/students or applicants you wish to attend the event.



In the **Prospective Pupils/Applicants** panel, click the **New** button, then select either **Prospective Pupil** or **Applicant** to display the **Browse Prospective Pupils** or **Browse Applicants** dialog respectively.

To add a Prospective Pupil:

1. Enter their **Surname** and **Forename**, then select their **Year of Entry** and **Year Group** from the drop-down lists.
2. Click the **Search** button to display all prospective pupils who match the search criteria entered and selected.
3. Highlight their name, then click the **OK** button to populate the **Prospective Pupils/Applicants** panel on the **Internal Visit Detail** dialog. To select multiple pupils, hold the **Ctrl** key, click each required pupil, then click the **OK** button. To select a block of pupils, click the first pupil, hold the **Shift** key, click the last pupil in the block, then click the **OK** button.

To add an Applicant:

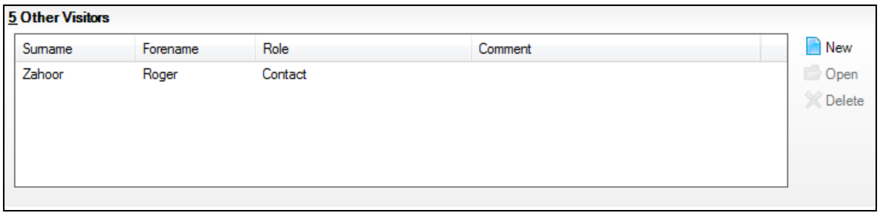
1. Enter their **Surname** and **Forename**. Alternatively, select their **Application Status**, **Intake Group**, **Admission Group**, **Tier** or **House** from the drop-down lists.
2. Click the **Search** button to locate the required applicant.
3. Highlight their name, then click the **OK** button to populate the **Prospective Pupils/Applicants** panel on the **Internal Visit Detail** dialog. To select multiple applicants, hold the **Ctrl** key, click each required applicant, then click the **OK** button. To select a block of applicants, click the first applicant, hold the **Shift** key, click the last applicant in the block, then click the **OK** button.

To Edit Prospective Pupils/Applicants:

1. On the **Prospective Pupils/Applicants** panel, highlight the pupil/applicant you wish to edit, then click the **Open** button to display the **Prospective Pupil/Applicant Visitor** dialog. The **Application Status** is populated automatically.
2. Enter any relevant **Comments** relating to the selected prospective pupil/applicant.
3. If the prospective pupil/applicant **Attended** this visit, select the check box. If this check box is selected, select the prospective pupil/applicant's **Reason for not attending** from the drop-down list. If this check box is not selected, the **Reason for not attending** field defaults to **<None>** and is read-only.
4. Click the **OK** button to return to the **Internal Visit Detail** dialog.

To Add Other Visitors:

The **Other Visitors** panel is used to add the parent/guardians or other contacts you wish to attend the visit.



1. Click the **New** button to display the **Other Visitor** dialog.
2. Click the **Search** button to display the **Browse Other Visitors** dialog.
3. Enter the visitor's **Surname** and/or **Forename** or select their **Role** from the drop-down list.
4. Click the **Search** button to display all visitors who match the search criteria entered and selected.
5. Highlight their name, then click the **OK** button to return to the Other Visitor dialog, where the **Other Visitor** field is populated with the selected visitor. The visitor's **Role** is populated automatically.
6. Enter any relevant **Comments** relating to the visitor.
7. Click the **OK** button to return to the **Internal Visit Detail** dialog.

Saving the Record

Once all the required basic and registration information has been entered, the record can be saved at any point. Click the **Save** button on the toolbar to save your progress. Any missing mandatory information is highlighted in red together with a warning message which is displayed on the Status Bar. This information must be completed before the record can be saved. You can now complete any of the other panels in the **Application** page and save at any subsequent point. The remaining panels of information are the same panels used to record information on existing pupil/students within your school.

Additional Resources:

Maintaining Pupil/Student Information chapter in the *Managing Pupil/Students* handbook

More Information:

Adding/Editing Basic Details on page *170*
Adding/Editing Registration Information on page *175*
Adding/Editing an Address on page *188*
Recording Telephone Numbers and Email Addresses on page *198*
Adding/Editing Family/Home Information on page *201*
Adding/Editing Medical Information on page *213*
Adding/Editing Ethnic/Cultural Information on page *219*
Adding/Editing Additional Information on page *225*
Adding/Editing Welfare Information on page *234*
Adding/Editing a Pupil/Student's School History on page *241*
Recording User Defined Fields on page *247*

Importing Admissions Data Transfer (ADT) Files

An Admissions Data Transfer (ADT) file contains a list of applicants to your school, together with their relevant known information. These applicants may be children who fall within your Local Authority's (LA) catchment areas or who have named your school as a preference on their Common Application Form. The applicants in an ADT file should be imported into an applicable pre-admission or intake group and then ranked into order of preferred acceptance by applying your school's published selection criteria.

> *NOTE: Admissions groups are set up via **Routines | Admission | Admission Groups | Setups**.*

There are currently four types of ADT file:

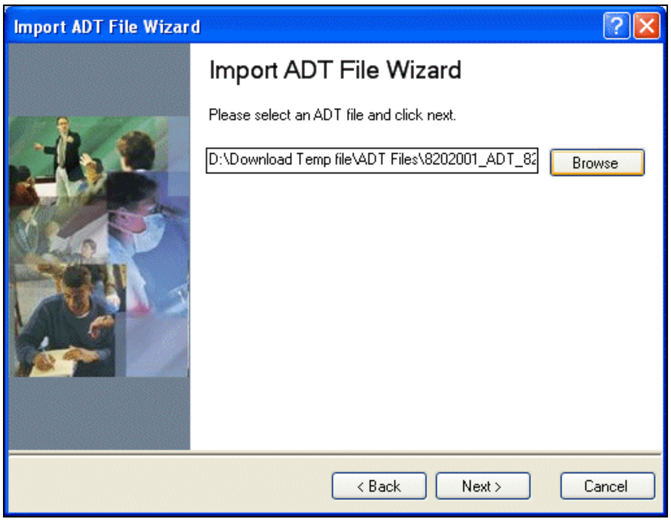
- **Prime** file – This is the initial file sent by the LA and includes all applicants that have stated a preference for a place at your school. There may be occasions where the initial ADT file does not contain all applications and the LA may need to send additional prime files.
- **Change** file – A parent or guardian may choose to change their school preferences or amend application data by writing to the LA. A change file therefore contains any such amended applications or a change in the data previously supplied in the application, such as an address.
- **Withdrawal** file – A parent or guardian may withdraw their application to your school by writing to the LA. A withdrawn file, therefore, contains applications with a status of **Withdrawn**. The application status in SIMS is updated accordingly.
- **Late** file – Parents must return the Common Application Form to the LA by a specified closing date. Forms received by an LA after this date will be considered as 'Late' applications. LA's will send the late applications to schools in an ADT file which has a status of 'Late'. You should then deal with the late applications in accordance with their admissions policy.

Importing ADT Files

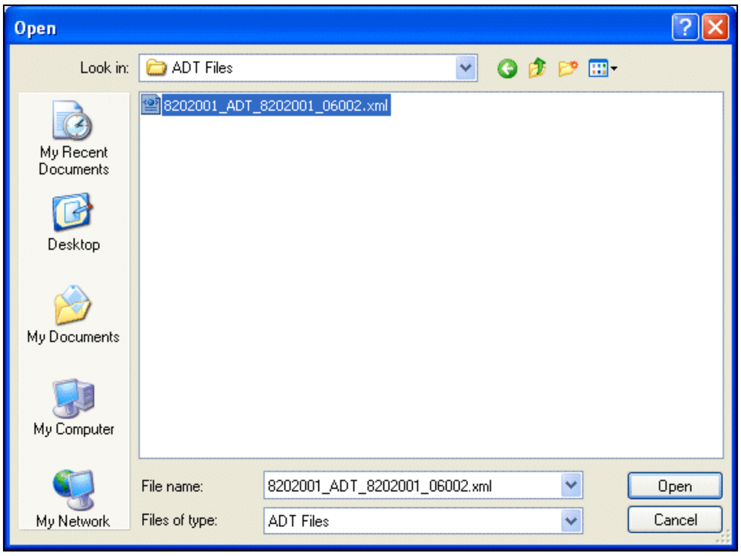
Before proceeding, ensure that you have copied the ADT file received from your LA to a suitable location.

1. Select **Routines | Admissions | Import ADT File** to display the **Import ADT File** wizard.

2. Click the **Next** button to continue.



3. Select the required ADT file by clicking the **Browse** button to display the **Open** dialog.



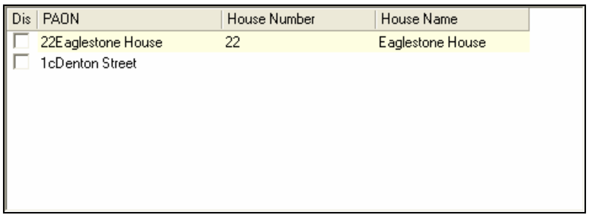
4. Navigate to the location of the stored ADT file then click the **Open** button to attach the file.
5. Click the **Next** button to continue. At this point, applicant's addresses contained in the ADT file are validated. If no address issues are identified, no action is required and the following page would not be displayed. If this is the case, you are prompted to select an intake group as described in step 6.

   The **House Number** and **House Name** of an address are held in a single field called **PAON** (Primary Addressable Object Name). Any addresses with incorrectly formatted PAON fields are displayed as shown in the following example:

Only addresses that SIMS cannot reconcile without user intervention are shown.

*NOTE: Deselecting the **Hide Best Guess** check box displays all the addresses that SIMS will reconcile automatically.*

These addresses can be corrected by clicking in either the **House Number** or **House Name** field (until a flashing cursor appears) and manually entering the correct information as shown in the following example:



Alternatively, you can double-click in the **PAON** field where you want the address to be split, e.g. double-clicking in between the **22** and the **E** in **22Eaglestone House** splits the address to **22 Eaglestone House** as shown in the previous example.

Repeat for the remaining addresses. Alternatively, the address details can be discarded (and will not be imported) by selecting the **Dis** check box adjacent to the relevant entry. The address details need to be entered following import.

If a large number of addresses require correction during import, schools should request a correctly structured ADT file from their Local Authority.

6. After correcting or discarding any incorrect addresses (if required), click the **Next** button to continue with the import.

NOTE: Please ensure that the Intake Group and pre-admission group selected, have been defined for the correct date of admission before proceeding with the import.

The **Filter by entry year and group** check box is selected by default. This ensures that only pre-admission groups that have been associated with the selected Intake Group are available for selection. De-selecting this check box enables users to select from a list of all the pre-admission groups that have been defined as well as changing the Intake Group.

7. SIMS verifies that the details contained in the header of the ADT (which identifies the admission year for example) correspond to the details of the selected **Intake Group** into which the file is being imported.
8. Highlight the required **Pre-Admission Group** from the list then click the **Next** button to continue. The ADT file is now imported.

> ***IMPORTANT NOTE:*** *When an ADT file that contains applicants who were originally recorded as an enquiry is imported, the application is linked to the enquiry. This enables you to produce conversion rates relating to enquiries that progressed into an application. The original enquiry record is also marked as inactive.*

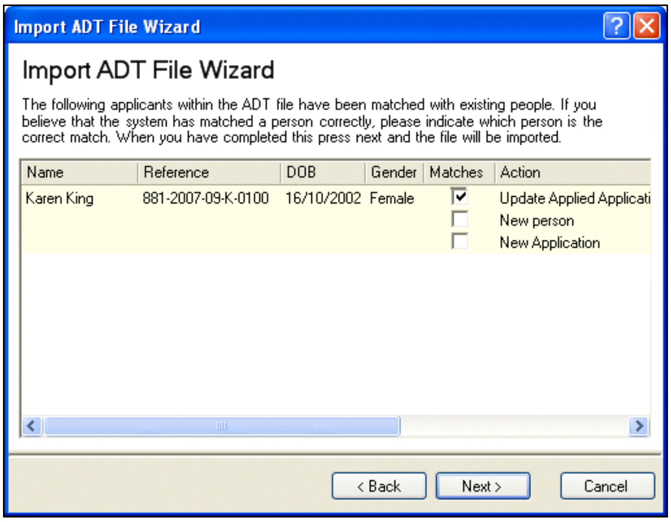
Dealing with Duplicate Applicants

Schools who have either manually entered, or imported applicants via CTF, may encounter some duplicates (and possibly duplicate contacts where an applicant has a sibling in the school for example).

Application Reference Numbers (ARNs) are allocated to each applicant included in the ADT file. ARNs cannot be manually entered into SIMS and therefore, existing applicants stored in SIMS can only have an ARN if they were imported via an ADT file or Admissions Transfer File (ATF) file.

SIMS first tries to match the applicants in the ADT file by ARN. If a matching ARN is found within SIMS, the applicant is deemed to be an exact match and is marked for import without the need for user intervention. Any data for the selected applicant that does not already exist within SIMS is imported from the ADT file.

SIMS next tries to match on UPN, then Surname (Legal Surname) and Forename (Legal Forename). Any matches found are listed in the wizard as shown in the following example:



You need to determine whether or not these applicants are duplicates. Use the scroll bar to view all the available details then choose from the following options:

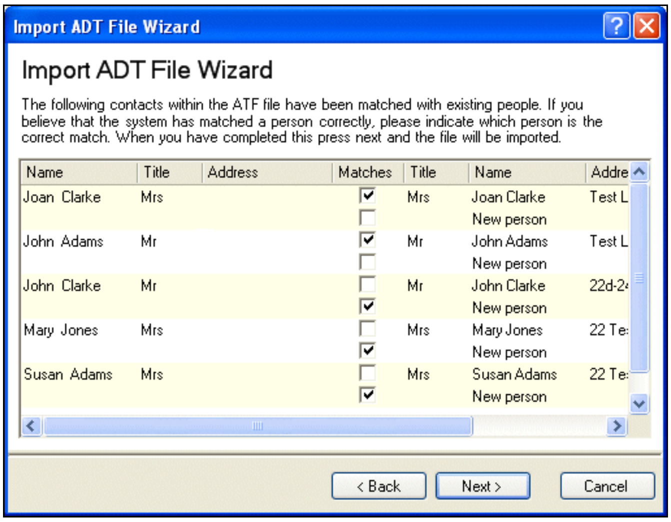
- If an applicant in the ADT file is a match for an applicant already stored in SIMS, select the **Matches** check box adjacent to the **Update Application**. Any data for the selected applicant that does not already exist in SIMS is imported and any applicable existing data is updated.
- If an applicant in the ADT file is a match for an applicant already stored in SIMS, but their application is a new application (i.e. the application stored in SIMS is for another admissions year), select the **Matches** check box adjacent to the **New Application**. Any data for the selected applicant that does not already exist in SIMS is imported and any applicable existing data is updated. In addition, the applicant's ARN is added and the application to the Intake Group and Pre-Admission Group selected for this ADT file is also updated.
- If an applicant in the ADT file is a completely new applicant, i.e. they do not already exist in SIMS, select the **Matches** check box adjacent to the **New person**. A new applicant record is created and all the applicant details available in the ADT file are imported.

*NOTES: Any applicants found in the ADT file who match existing applicants in SIMS and have been marked for import, are only imported if the existing application status stored in SIMS is **Applied**. If the existing SIMS applicant has an application status of **Offered**, **Accepted** or **Withdrawn**, the applicant is not imported and the information is recorded in the Import Log.*
Where a matching applicant is marked for import, any data for the selected applicant that does not already exist in SIMS is imported and any applicable existing data is updated.

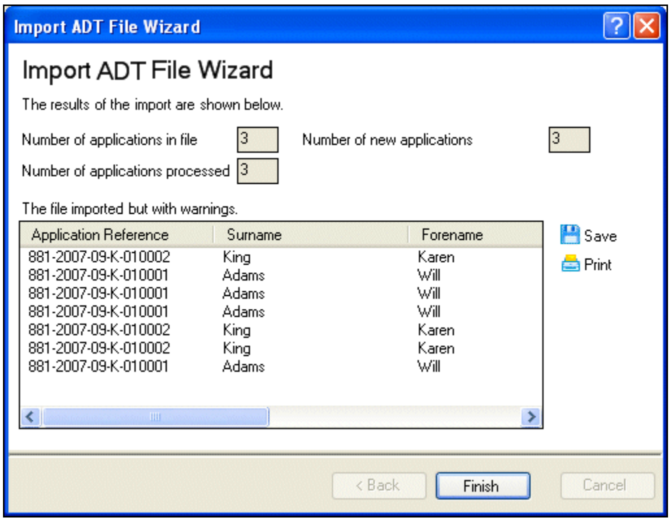
1. Click the **Next** button.

SIMS then checks to see if any applicant in the ADT file shares a contact who has already been added to SIMS, e.g. they are a sibling of an existing pupil/student. Any matches are listed in the wizard and must be processed as follows:

- If any of the contacts listed match an existing SIMS contact, select the **Matches** check box adjacent to the correct **Name**.
- If any of the contacts listed are a new contact, select the **Matches** check box adjacent to the **New** person field.



2. Click the **Next** button to continue with the import. Once complete, the following page of the **Import ADT File** wizard is displayed:



The **Number of applications in file**, the **Number of applications processed** and the **Number of new applications** are displayed, together with a list of any errors or warnings that may have occurred.

Applicants are imported with a status of **Applied** and their details can be viewed and updated through **Focus** | **Student** | **Pre-Admission Student**.

3. Click the **Save** button if you wish to save this error log.

4. Click the **Finish** button to complete the process and close the **Import ADT File** wizard.

Late ADT Files

Schools may receive additional ADT files after they have imported the initial ADT file.

A **Late** file enables you LA to send you details of applicants whose applications to join your school were received after the last closing date for applications. Some schools may not entertain late applications at all whilst other schools may occasionally have a spare place remaining.

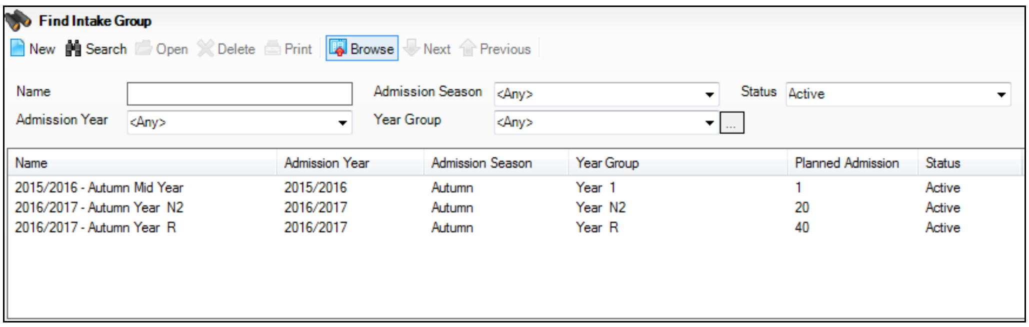
> *NOTE: Please refer to the relevant SIMS Admissions Code of Practice handbook for further information. These handbooks are available from My Account (https://myaccount.capita-cs.co.uk), and from the* ***Documentation Centre*** *which is launched by clicking the* ***Documentation*** *button on the* ***Home Page*** *in SIMS. Once open, click the* ***Handbooks*** *button, select the required category, then click the required handbook from the* ***Handbooks*** *page.*

Accepting Applications

When an applicant accepts a place at your school, their **Application Status** should be updated from **Offered** to **Accepted**, enabling you to keep track of their application and run relevant reports as necessary. Applicants are not given an admission number or added to the school roll until their status is changed to **Admitted**. The **Application Status** can be changed in bulk for a group of applicants (as described in the next section), or on an individual basis via the **Applicant Details** page.

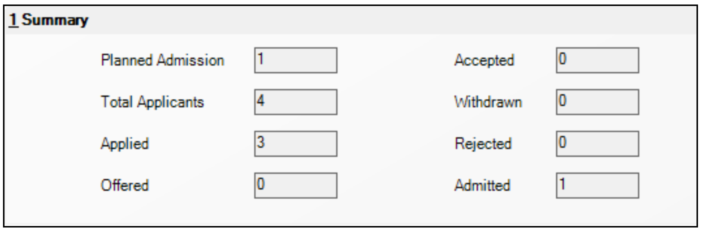
Accepting Applicants

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.



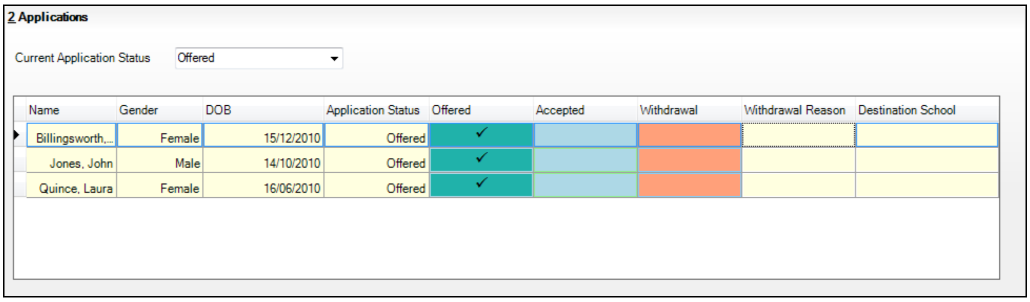
2. Search for and then double-click the required Intake Group to display the **Accept/Decline Applications** page.

The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.



Data Type	Description
Planned Admission	The original number of new applicants intended for this intake group.
Total Applicants	The number of applicants who have applied for a place in this intake group.
Applied	The number of applicants who have applied for a place in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Admitted	The number of applicants who have been admitted into this intake group.
Reserved	The number of places reserved for applicants (Independent schools only).

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, **Date of Birth** and **Application Status** of each applicant with a tick grid enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.



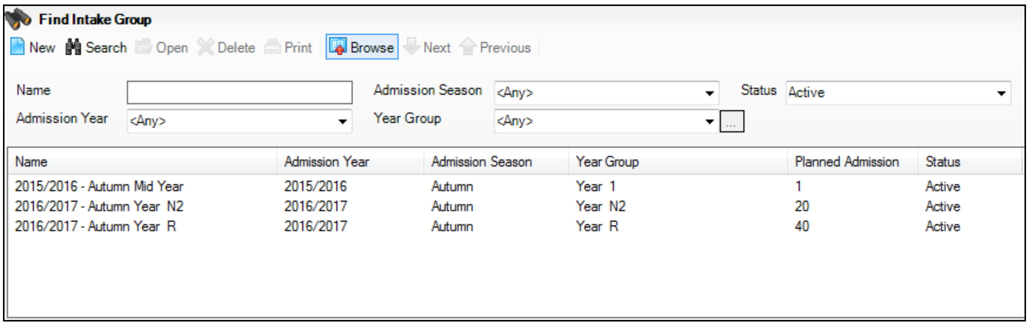
3. If you want to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** and follow this same process.
4. For each applicant in the list, click in the applicable cell/column to insert a tick indicating the required application status. In most circumstances, this is **Accepted** but you may also wish to withdraw applicants at this stage.

5. Once complete, click the **Save** button on the toolbar to save the changes. The **Application** panel refreshes its display and show only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list will be empty.

Admitting Applicants

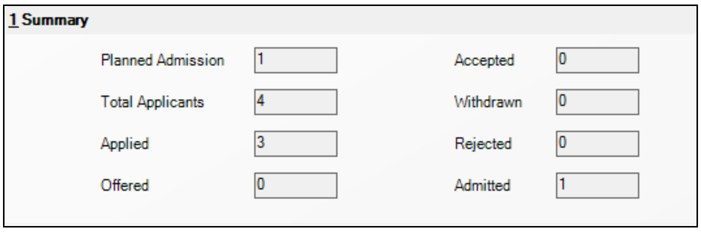
Applicants who are admitted to your school are given an admission number (excluding guest pupil/students) and are also included on your school roll from the date of admission. The DfE regulations on admissions indicate that applicants should be admitted on the first day that you expect them to attend, and not when they actually arrive at the school. If however, you are contacted by a parent who explains why the applicant will not be able to start on the specific date, you can agree a new start date.

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.



2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

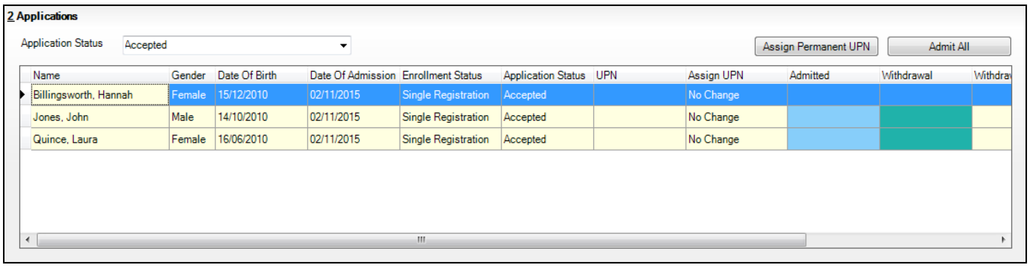
   The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.



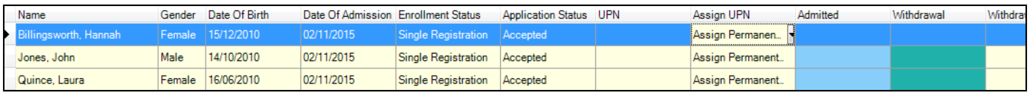
Data Type	Description
Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.

Data Type	Description
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).
Admitted	The number of applicants admitted so far.

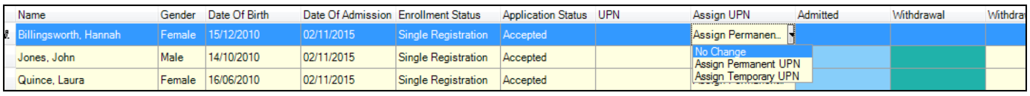
The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name**, **Gender**, **Date of Birth**, proposed **Date of Admission**, **Enrolment Status**, **Application Status**, **UPN** and whether a UPN will be assigned. A tick grid is provided enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.



3. If you want to admit applicants with a different application status, such as **Offered**, select it from the **Application Status** drop-down list, then follow the remainder of this process.
4. If you wish to assign permanent UPNs to the applicants, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN** as shown in the following screenshot:



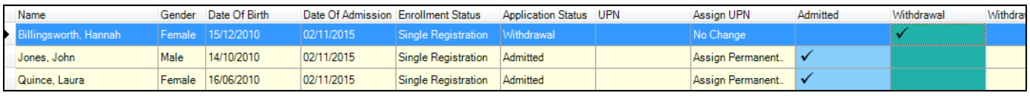
5. To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN** as shown in the following screenshot:



- **Permanent UPNs** are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
- **Temporary UPNs** are issued to an applicant only when a school does not know their permanent UPN (e.g. awaiting transfer file/applicant's information).

6. If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.

> *NOTE: Applicants can be withdrawn at this stage if required by clicking in the* ***Withdrawal*** *column adjacent to the applicable applicant.*



Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Withdra
Billingsworth, Hannah	Female	15/12/2010	02/11/2015	Single Registration	Withdrawal		No Change		✓	
Jones, John	Male	14/10/2010	02/11/2015	Single Registration	Admitted		Assign Permanent..	✓		
Quince, Laura	Female	16/06/2010	02/11/2015	Single Registration	Admitted		Assign Permanent..	✓		

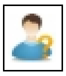
7. Once complete, click the **Save** button to admit the applicants. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list will be empty.

Deleting an Application

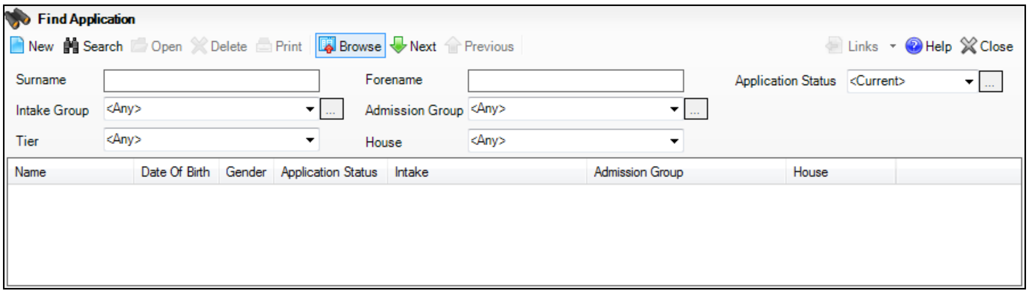
There may be occasions when an application needs to be deleted. This could be because:

- the application has been entered in error
- an applicant has decided not to attend your school and you do not want to record them as withdrawn
- you are an Own Admissions Authority school and are oversubscribed. You may therefore want to delete any applications imported from an ADT file supplied by your Local Authority, where a place has not been offered that. This should be carried out in April, after the possibility of an appeal has passed.

1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.



Application icon



2. Search for the required application, then click the applicant to highlight their record.
3. After ensuring that you have identified the correct application, click the **Delete** button on the browser toolbar.

A warning message is displayed: `Deleting Applications will affect your annual statistics and is irreversible. Are you sure you wish to continue?`

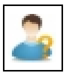
4. Click the **Yes** button to delete the application.

   An additional message is displayed: `The application has successfully been deleted from the system.`

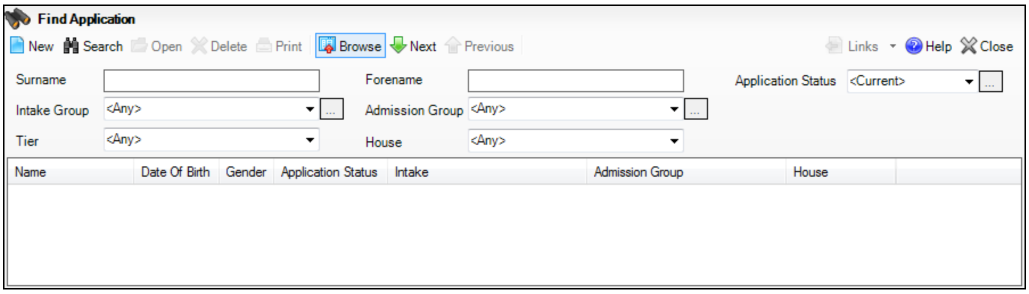
Changing the Status of an Individual Application

In addition to changing the application status in bulk, it is also possible to change the status for individual applicants as follows:

1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.

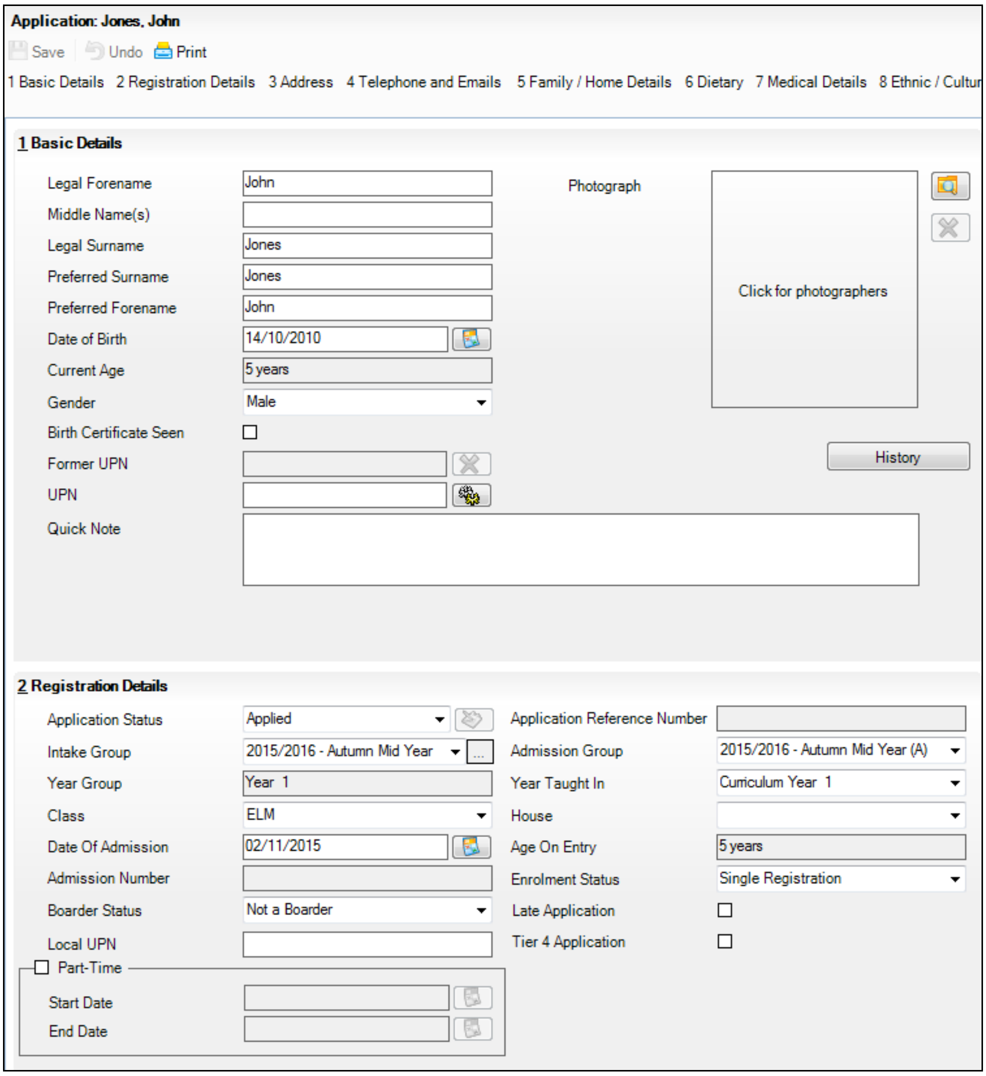


Application icon



> *NOTE: Only applicants with a current **Application Status** are displayed by default (i.e. applications with a status other than **Withdrawn**, **Rejected** or **Admitted**).*

2. Search for and select the required applicant to display the **Application** page.



3. The current status of the application is displayed in the **Application Status** drop-down list in the **Registration Details** panel. Select the required new status from the drop-down list.

NOTE: It is possible to select any application status (skipping a status if required), i.e. there is no need for the statuses to be selected in order.

The status can be changed to any of the following:

Status	Description
Applied	Select this status if the applicant has applied for a place in the selected intake group.
Offered	Select this status if the applicant has been offered a place in the selected intake group.
Accepted	Select the status if the applicant has accepted a place in the selected intake group.
Admitted	Select this status if you wish to admit the applicant into the selected intake group. Admitting applicants gives them an admission number (excluding guest pupil/students) from the admission date specified for the intake group. They will then be included on the school roll. You should therefore admit applicants only when they actually arrive at your school. Once admitted, if they do not arrive, they can only be removed from the system by deleting them.
Rejected	Select this status if the applicant has failed the selection criteria and has not attained a place in the selected intake group (Independent and Northern Ireland schools only).
Reserved	For Independent schools only – select this status if you wish to reserve a place for the applicant. They will not appear in any routines for finalising offers, accepting or admitting until their status is changed.
Withdrawn	Select this status if the applicant has withdrawn their application from the selected intake group.

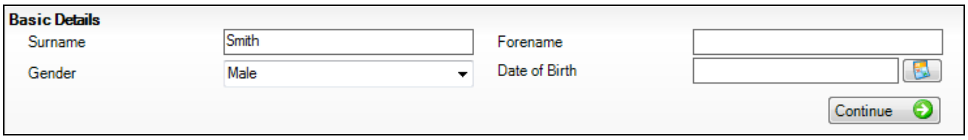
4. Click the **Save** button to save the new application status.

Re-admitting Pupil/Students

Any pupil/student who leaves the school and subsequently decides to return needs to be re-admitted. Do not remove the date of leaving because this will not show a period of absence from the school. However, if a pupil/student is intending to leave, but subsequently changes their mind (i.e. does not leave), the date of leaving can be removed.

If you need to analyse this information or need to record new registration or deposit fees, you must create a new application. If a student is going to return in the future, this must be processed via a new application. This applies also to students who leave for only a few days. However if a student is starting immediately and you do not need to record a deposit or analyse the details, you can process this directly through the student record.

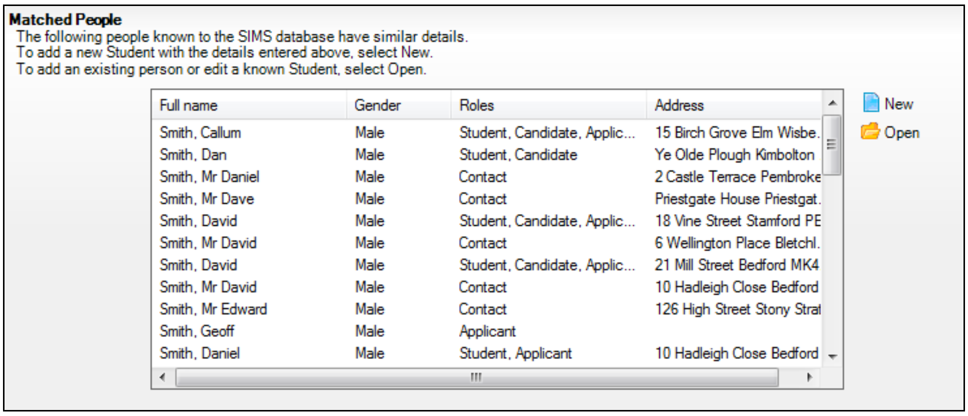
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Pupil (or Student) Details** page.
2. Click the **New** button to display the **Basic Details** panel.



It is only necessary to enter limited information in this panel as you know that the person already exists. It is advisable not to be too specific with the search criteria (e.g. just enter the first few letters of the **Surname** and the gender) to ensure that the existing pupil/student is found.

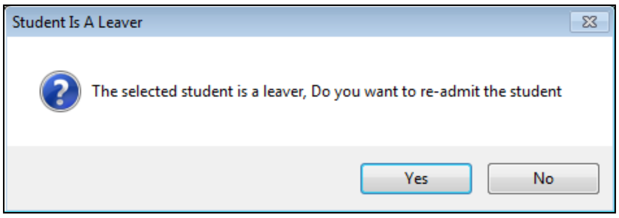
> *NOTE: If the pupil/student name has changed since leaving, ensure that you search on their previous name.*

3. Click the **Continue** button to display a list of **Matched People** based on the search criteria entered.



> *NOTE: Check the role is **Student** in case a parent or other contact has the same name.*

4. Highlight the required pupil/student and click the **Open** button. The following warning message is displayed:



5. Click the **Yes** button if you are certain that this is the pupil/student who is to be re-admitted. Their details are displayed in the **Pupil** (or **Student**) **Details** page.

6. Complete the mandatory fields (**Registration Group**, **Year Group**, **Year Taught In**, **Enrolment Status** and **Admission Date**) and check any other details which may have changed since they were last on-roll (such as their address). Ensure that the UPN is recovered or a new UPN generated if it did not previously exist.
7. Click the **Save** button on the toolbar to re-admit the pupil/student. Any mandatory fields are highlighted in red and must be completed before the record can be saved.

   If the pupil/student's registration status has changed from when they were previously on-roll, you need to change the enrolment status via **Routines | Pupil** (or **Student**) **| Change Enrolment Status**.

10| Recording Communications and Follow Ups

Introduction

It is possible to search for and record details of any communications that you receive from, or send to, the contact or parents of a prospective pupil or existing applicant. It is also possible to attach documents that you have received electronically or scanned into SIMS.

The type of communication could range from an initial enquiry regarding admission places, through to the application being accepted and subsequent correspondence during the applicant's time at the school.

This facility also enables the recording of communications relating to fees, deposits and bills, for those schools using Fees.

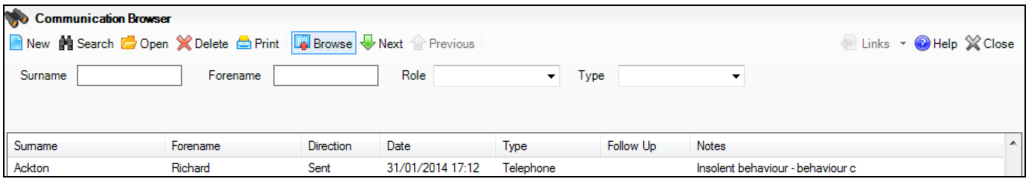
Communication details can be accessed and entered in a number of ways. Accessing the **Communication** browser via **Focus | Communication** enables you to search for all communications to see which may have already been entered into SIMS. You can click on the relevant columns in the **Communication Browser** to sort them and aid in your search. For example, clicking on the **Follow Up** column allows you to sort the communications in order of their need for a follow up contact. For schools using Fees 7, the search functionality enables the sorting of communications by **Priority** using this method. Communications can be added via **Focus | Communication**, which is beneficial in selecting multiple applicants (or prospective pupil/students) for communications made on behalf of several people.

You can also access the **Communication Details** browser from within an applicant's or enquirer's details by clicking the **New** button adjacent to the **Communications** panel on the **Application Details** or **Enquiry Details** page. This is useful when searching for, or adding, a specific communication regarding an applicant (or prospective pupil/student).

The following process describes the method of adding a communication via **Focus | Communication**.

Searching for a Communication

1. Select **Focus | Communication** to display the **Communication** browser.



2. Enter the **Forename** and **Surname** of the individual from whom the communication was sent or received. Alternatively, select their **Role** from the drop-down list e.g. **Enquirer** or select the **Type** of the communication.
3. Click the **Search** button to display all individuals who match the search criteria entered.

> *NOTE: You can click the column headings to sort the communications by various criteria. Clicking the same heading again reverses the sort order. For example, clicking the **Direction** heading enables you to sort the communications in order of those **Received** or **Sent** by the school.*

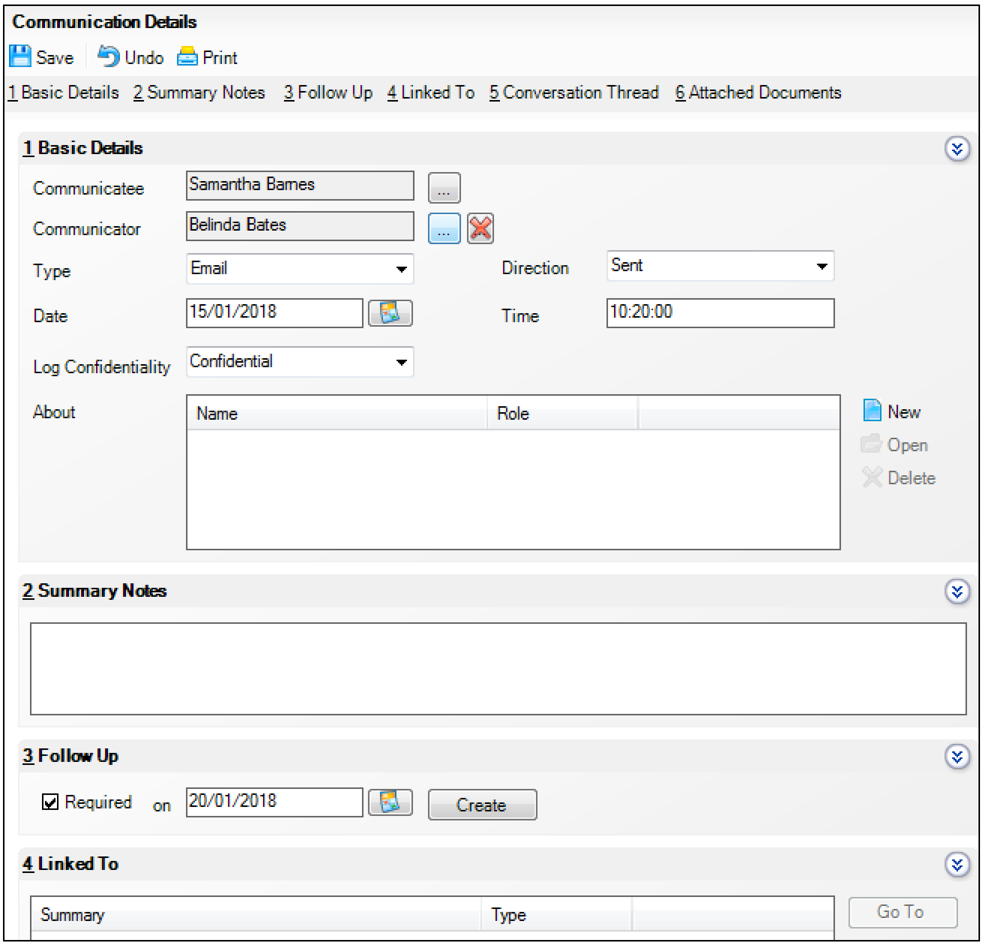
4. Highlight the required communication, then click the **Open** button to display the **Communication Details** page.

Adding a Communication

Using the Communications facility, you can add new communications, follow-up any communications that have already been received and keep a complete history of all correspondence between the school and the applicant’s contact/parents.

1. Select **Focus | Communication** to display the **Communication Details** browser.

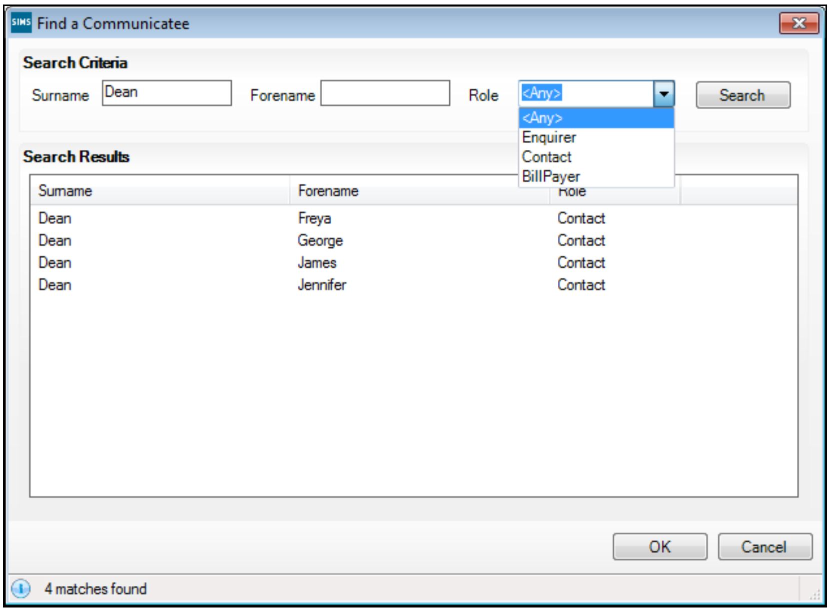
2. After searching for an existing communication to ensure that it does not already exist (please see *Searching for a Communication* on page *306*), click the **New** button to display the **Communication Details** page.



To ease navigation and to enable only the details you wish to view to be displayed, click the chevron button at the top right-hand side of any of the panels on this page to show or hide its content.

Adding Basic Communication Details

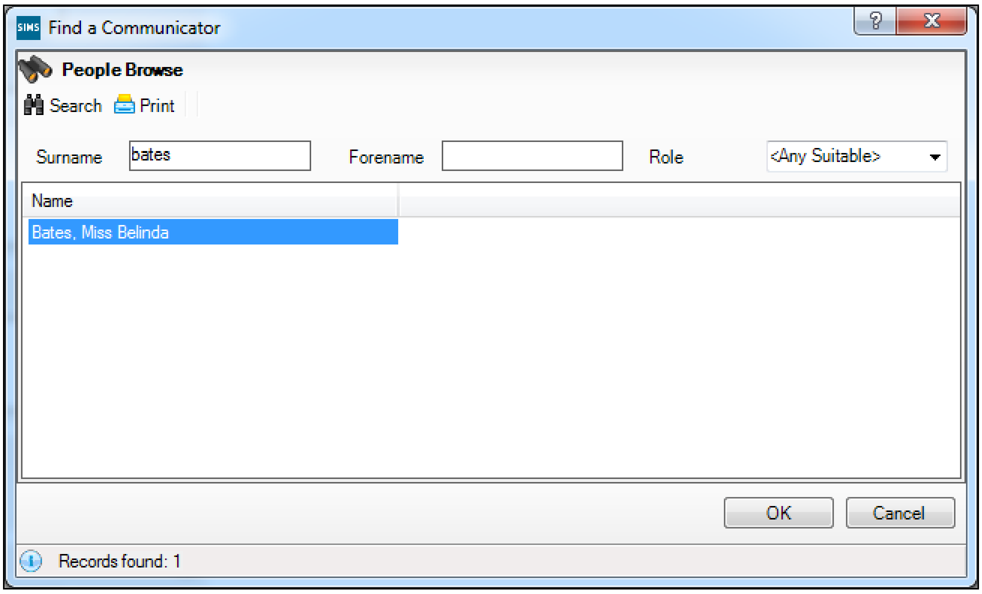
1. To select the person to whom the communication is concerned, click the **Browse** button adjacent to the **Communicatee** field in the **Basic Details** panel to display the **Find a Communicatee** dialog.



2. Enter the **Surname** and **Forename** of the communicatee or select their **Role** from the drop-down list. Alternatively, leave all the fields blank, then click the **Search** button to display all communicatees recorded in SIMS.
3. Highlight the required communicatee, then click the **OK** button to return to the **Communication Details** page, where the **Communicatee** field in the **Basic Details** panel is populated.

   The **Communicator** field in the **Basic Details** panel is populated automatically with the name of the person creating the record.

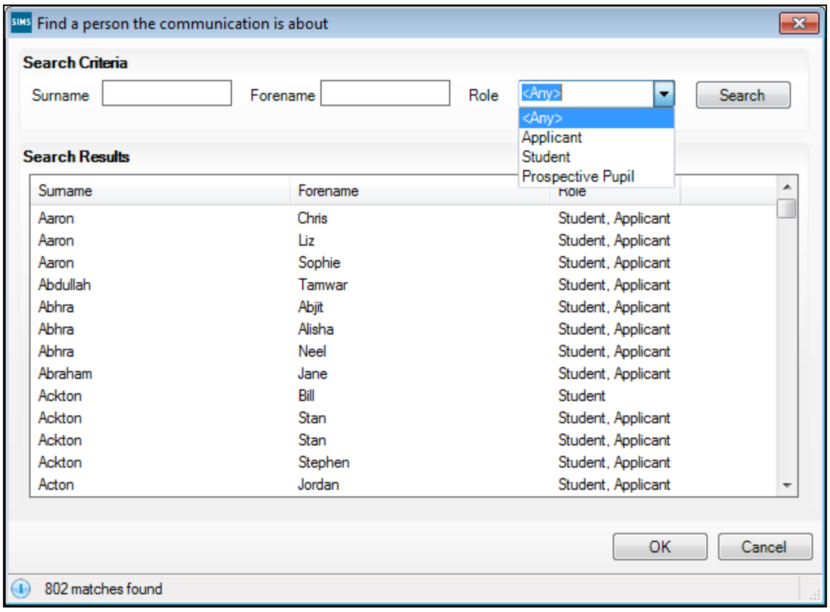
4. If the communication was made by another member of staff, click the **Browse** button adjacent to the **Communicator** field to display the **Find a Communicator** dialog.



5. Enter the **Surname** and **Forename** of the communicator or select their **Role** from the drop-down list. Alternatively, leave all the fields blank, then click the **Search** button to display all people recorded in SIMS.
6. Highlight the required communicator, then click the **OK** button to return to the **Communication Details** page, where the **Communicator** field in the **Basic Details** panel is populated.
7. If the communication was made by a person who is not a member of the school's staff, click the **Remove the communicator from this communication** button adjacent to the **Communicator** field. This clears the content from the **Communicator** field.
8. For users of Fees 7, the **Priority** field is provided. Select the **Priority** from the drop-down list. This provides a **Priority** field, which can be used to order the display of communications when searching.
9. Select the **Type** of communication from the drop-down list. Additional communication types can be added via **Tools | Lookups | Maintain**.
10. For users of Fees 7, an additional **Type** field is provided, which enables you to select a fees-related communication type e.g. **Fees Communication**.
11. Select the **Direction**, which indicates whether the communication was **Received** by the school or **Sent** from the school.

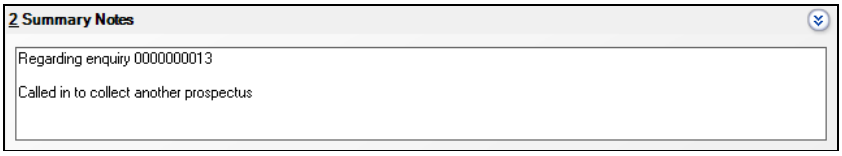
    The **Date** that the communication was received or sent defaults to today's date but it can be changed by clicking the **Calendar** button, then selecting the required date. The **Time** field is also populated automatically.

12. Select the status of the communication from the **Log Confidentiality** drop-down list.
    - **Public** - the communication is available to those with view and view/edit access rights. Individuals with view and view/edit access rights to private and confidential as well as public communications will also be able to change the status of the communication from public to private or confidential.
    - **Confidential** - the communication is available only to the school administrator, the senior leadership team and the SENCo for messages. These people have permission to view and view/edit a communication. Only the owner of a confidential communication and the school administrator will have the right to delete any confidential communication and to make any confidential communication public. This will be particularly important where originators of the communication have left the school.
    - **Private** - the communication is available to those saving it. If required only the owner of a Private communication will be able to make it Public. The system manager will be able to delete the Private communication, where, for example, the owner is no longer employed by the school.
13. Click the **New** button adjacent to the **About** field to display the **Find a person the communication is about** dialog.



14. Enter the **Surname** and **Forename** of the person or select their **Role** from the drop-down list. Alternatively, leave all the fields blank, then click the **Search** button to display all people recorded in SIMS.
15. Highlight the required person, then click the **OK** button to return to the **Communication Details** page, where the **About** table is populated.
16. Enter any comments (up to a maximum of 500 characters) in the **Summary Notes** panel.

The **Summary Notes** panel is useful for viewing/adding concise details of the communications sent from, and received by, your school.

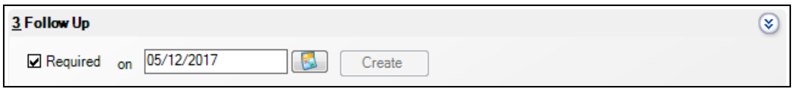


If the communication relates to an enquiry, the **Summary Notes** field displays the enquiry reference number allocated by SIMS.

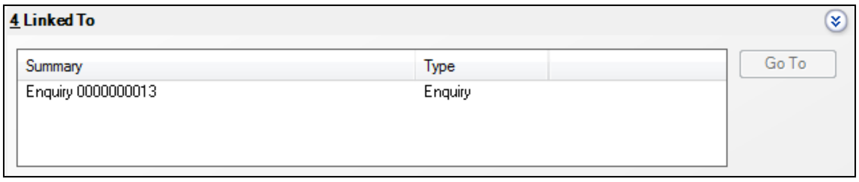
17. **Save** the information entered in the **Basic Details** and **Summary Notes** panels.

> *NOTE: If you do not save the details entered in the **Basic Details** and **Summary Notes** panels, the **Create** button will not be activated in the **Follow Up** panel.*

18. If a **Follow Up** is actioned by the school, select the **Required** check box, then enter the date on which the follow up should be carried out. If you click the **Create** button before clicking the **Save** button, a **Conversation Thread** is created with a date and time stamp.



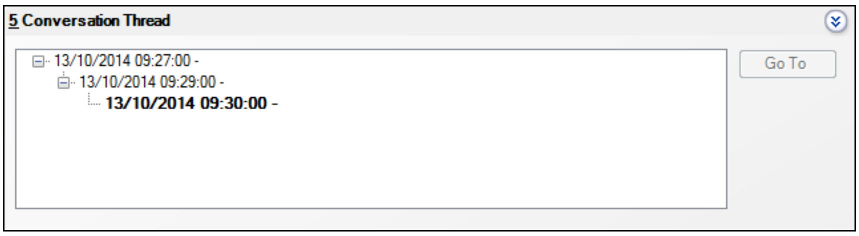
19. If the communication is connected to an enquiry, an application or a fees payment, the nature of the link is displayed in the **Linked To** panel. Click the **Go To** button to view the details of the link.



20. Click the **Save** button.

Viewing the Conversation Thread

The **Conversation Thread** panel enables you to view the full details of all communication traffic involved in the current communication.



The panel displays information on the date and time at which each communication entry has been saved, together with the details entered in the **Summary** panel.

Click to highlight an entry, and click the **Go To** button to display the full details of this communication entry in the **Communication** page.

Attaching Documents

Documents can be attached to the communication record (please see *Adding Notes/Documents* on page *383*).

Deleting a Communication

WARNING: *Careful consideration should be given before deleting a communication because once it has been deleted it cannot be recovered.*

1. Select **Focus | Communication** to display the **Communication Details** browser or click the **Communications** hyperlink on the **Enquiry Details** or **Application Details** page.
2. Search for the required communication (please see *Searching for a Communication* on page *306*), highlight it, then click the **Delete** button.

11 | Importing and Exporting CTFs

Importing CTFs

> ***IMPORTANT NOTES:*** *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). If you are in any doubt, you should consult with your IT Security Officer before proceeding.*
> *Please ensure that you use either CTF or ATF files to import pupil/students into SIMS. Using both methods can produce duplicate entries.*

Common Transfer Files (CTFs) are used to electronically import and export data for pupil/students transferring from one school to another. Each transfer file can contain details of the transferring pupil/student (such as contacts, attendance history, assessment data, etc.) in addition to details of the transferring and receiving schools. Using CTF saves time for both schools (exporting from one school and importing into the other) and provides a method of moving data accurately.

Once generated, the CTF can be transferred by School to School (https://www.gov.uk/guidance/school-to-school-service-how-to-transfer-information) or other local secure file transfer mechanisms.

Children with CTFs can be imported directly on-roll or into a pre-admission group as required.

If any of the pupil/students already exist in the system, any blank fields in their record are updated with data from the CTF file. Any existing data is considered to be the most up to date information and is therefore not overwritten.

Information Transferred via CTF

The information transferred when CTF files are sent is set up from the **Configure CTF Defaults** page, accessed via **Tools | Setups | CTF**.

Additional Resources:

Setting Up CTF Configuration Defaults section of the *General SIMS Setups* chapter in the *Setting Up and Administering SIMS* handbook

Before Importing a CTF

Before importing CTFs, you must ensure that:

- the CTF configuration defaults have been set up via **Tools | Setups | CTF**.
- the feeder school exporting the child is defined in your system via **Tools | Setups | Other Schools**.
- schools wishing to import SEN Details have previously set up an SEN Co-ordinator through **Tools** | **Setups** | **SEN Setup**.
- any required pre-admission groups must have been created.
- if you intend to import any assessment results, the required Assessment Manager Aspects must have been previously created or imported.
- the address data in the CTF is in <BS7666Address> format, <u>not</u> <Address Lines> format. If the address format is <Address Lines>, then you must run CTF_ATF_AddressLinesConverter located in the C:\Program Files\SIMS\SIMS .net folder to convert the address format.

Additional Resources:

Setting Up CTF Configuration Defaults section in the *Setting Up and Administering SIMS* handbook
XML AddressLines Conversion Utility handbook

Important Notes on Importing a CTF

Data Category	Description
Student Basic Details	Not all ethnicity codes can be transferred between England and Wales. As some schools use Main ethnicity codes, such as Black African, and others use Extended ethnicity codes, such as Black – Ghanaian, this can affect the accuracy of the transferred ethnicity data. If the school that sends the CTF and the destination school use different ethnicity codes, SIMS attempts to find the closest match. The **Exception Log** displays any instances of inexact or failed matches, and the **Error Description** column displays either: ▪ What ethnicity code the data has been imported as. ▪ That it has failed to find a match. In this case, the ethnicity data imports as **NOBT - Information not obtained**.

Data Category	Description
SEN Information	Only SEN Statuses of **N - No Special Educational Need** or **S - Statement** transfer from schools in England to schools in Wales, and vice versa. If the pupil/student already exists in SIMS and has a **SEN Status**, this may cause the data to not be imported from the CTF. If this is the case, a relevant entry is displayed in the **Exception Log**. If the pupil/student already exists in SIMS but the SEN statuses in SIMS and the CTF differ, SIMS assumes that the **SEN Status** with the most recent **Start Date** is correct. The status with the older **Start Date** then terminates the day before the **Start Date** of the more recent status. A message is displayed to confirm this. If the **SEN Status** in the CTF is not recognised in SIMS **Lookups**, then the data is not imported and an entry is recorded in the **Exception Log**. **SEN Needs** cannot be transferred between countries.
Exam results	When importing exam results via CTF from a school that has not been recorded in SIMS, an indirect feeder school record is created in **Tools | Other Schools**.

Data Included in the CTF Files

CTF Details

Applicable Regions	Data Details
England and Wales	Document Name CTF Version Date and Time Document Qualifier Data Qualifier Data Descriptor Supplier ID Source School Destination School

Student Basic Details

Applicable Regions	Data Details
England and Wales	UPN (Unique Pupil Number) ULN (Unique Learner Number) UCI (Unique Candidate Identifier) - Secondary schools only Surname Forename Date of Birth Gender Former UPN Preferred Surname Former Surname Legal Surname Preferred Forename Middle Names National Curriculum Year Ethnicity Ethnicity Source Language Information (Language Type and Language) Free School Meals Eligibility Free School Meals Review Date Medical Flag Disabilities Enrolment Status Phones Email Supplier Info
England only	Service Child in Education

SEN Information (All Regions)

Applicable Regions	Data Details
England and Wales	SEN History SEN Basic Needs - (Start Date and SEN Provision) SEN Needs (SEN Type Rank, SEN Type, SEN Need Start Date, SEN Need End Date) SEN Provision End Date
Wales only	SEN Provisions (Curriculum and Teaching Methods, Grouping and Support, Advice and Assessment, Specialised Resources)

Attendance Summary

Applicable Regions	Data Details
England and Wales	Year Date Year LEA Establishment Number URN School Name Sessions Possible Sessions Attended Sessions Unauthorised Sessions Authorised

Student Address

Applicable Regions	Data Details
England and Wales	BS7666 Address Information SAON PAON Street Locality Town County Postcode Country UPRN (Unique Property Reference Number)

Assessment Data (for England, KS1 tasks/tests is also included)

Applicable Regions	Data Details
England and Wales	Key Stage Information Stage Description Stage Assessment Locale Year KS Subject Method Component Result Status Result Qualifier Result Result Date

Programme of Study (PoS) Assessments

Applicable Regions	Data Details
England and Wales	Supplier Result Date Grade

School History

Applicable Regions	Data Details
England and Wales	School Information LEA Number Establishment Number URN School Name Entry Date Leaving Date Leaving Reason Last School

FSM History

Applicable Regions	Data Details
England and Wales	FSM Review Date FSM Start Date FSM End Date
Wales only	FSM Transitional Protection

Looked After

Applicable Regions	Data Details
England and Wales	InCare Care Authority

Student Contacts

Applicable Regions	Data Details
England and Wales	Order Title Surname Forename Middle Names Gender Relationship Address Phones Email

External Exam Results

Applicable Regions	Data Details
England and Wales	SuppID Board Level Subject ResultType Gradeset AspectName LEA Estab Month Year Result

NAW Details (Welsh Tags)

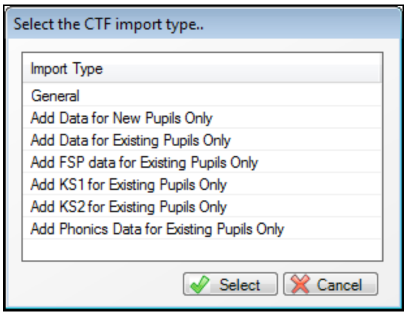
Applicable Regions	Data Details
Wales only	Speak Welsh National Identity

Importing a Common Transfer File (CTF)

The Core data (UPN, Surname, Forename, Gender and Date of Birth) is mandatory and is always imported.

> ***IMPORTANT NOTES:*** *You are strongly advised to run the Address Tidy and Merge routine before importing or exporting a CTF to reduce the number of potential issues with regard to address matching.*
>
> *Any pupil/students records where the reason for leaving is recorded as* ***Deceased*** *are not imported.*

1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog.



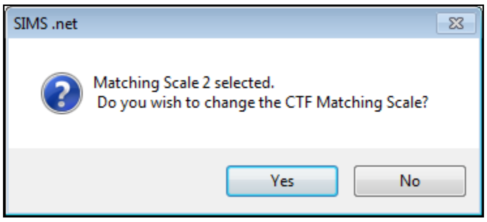
This dialog enables you to create the following types of CTF:

- **General** - imports a full CTF export file.
- **Add Data for New Pupils Only** - imports data for pupil/students who do not already exist in SIMS.
- **Add Data for Existing Pupils Only** - imports data in the CTF for pupil/students who already exist in SIMS.
- **Add FSP data for Existing Pupils Only -** imports Foundation Stage Profiles data in the CTF for pupil/students who already exist in SIMS.
- **Add KS1 for Existing Pupils Only** - imports Key Stage 1 data in the CTF for pupil/students who already exist in SIMS.
- **Add KS2 for Existing Pupils Only** - imports Key Stage 2 data in the CTF for pupil/students who already exist in SIMS.
- **Add Phonics Data for Existing Pupils Only** - imports Phonics Test result data for pupil/student who already exist in SIMS.

NOTES: Secondary schools in England are provided with additional options. The ***Add ULNs for Existing Pupils Only*** *option imports only the ULNs for students who already exist in SIMS.*

Secondary schools in Wales can ***Add Welsh National Test data for Existing Pupils Only****. This CTF Import Type imports National Test result data for students who already exist in SIMS.*

2. Highlight the required CTF import type then click the **Select** button to display a message asking you to confirm whether you wish to change the matching scale.



This message relates to the **Match and Import** panel on the **Import CTF** page, which enables you to examine the data stored in SIMS against the information in the CTF and decide which information should be imported.

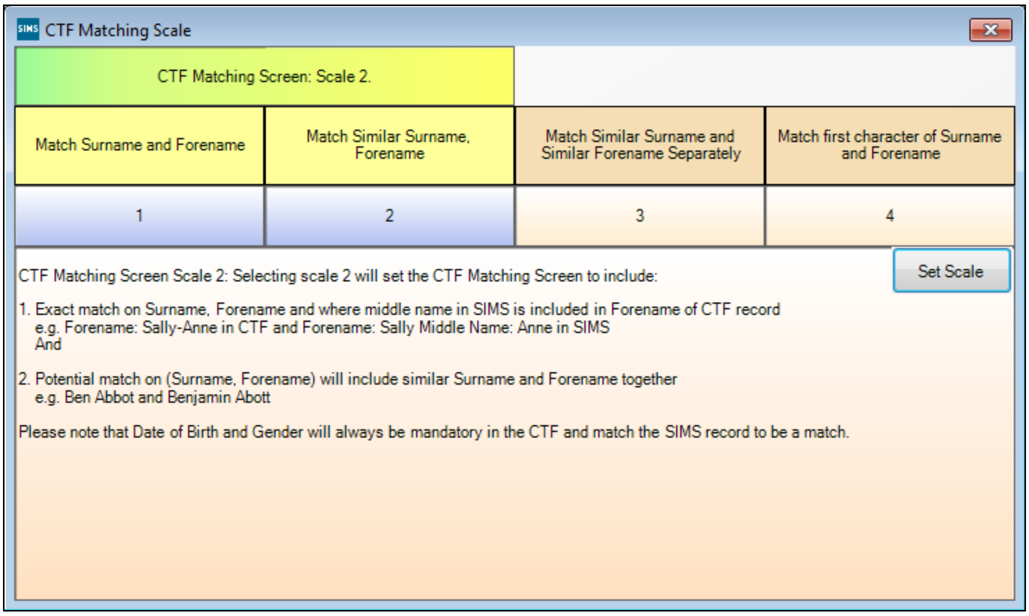
NOTES: The matching method used in previous versions of SIMS has not changed, neither have the data items contained in the CTF file.

The functionality provided by the ***Match and Import*** *panel on the* ***Import CTF*** *page is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF using the original method.*

When using the ***Match and Import*** *panel on the* ***Import CTF*** *page, you are strongly advised to use a screen resolution of 1280x1024.*

The scale defaults to level **2**, indicating that the system will match on similar surname and forename.

3. If you wish to remain on level **2** of the matching scale, click the **No** button to display the **Import CTF** page then import the CTF (please see *Importing the CTF* on page *331*). The page name is appended with the option selected in the previous dialog. To change the matching scale, click the **Yes** button to display the **CTF Matching Scale** dialog.



This screen enables you to select the required scale from the following:

- Scale **1** – Match Surname and Forename
- Scale **2** – Match Similar Surname and Similar Forename
- Scale **3** – Match Similar Surname and Similar Forename Separately
- Scale **4** – Match first character of Surname and first character of Forename

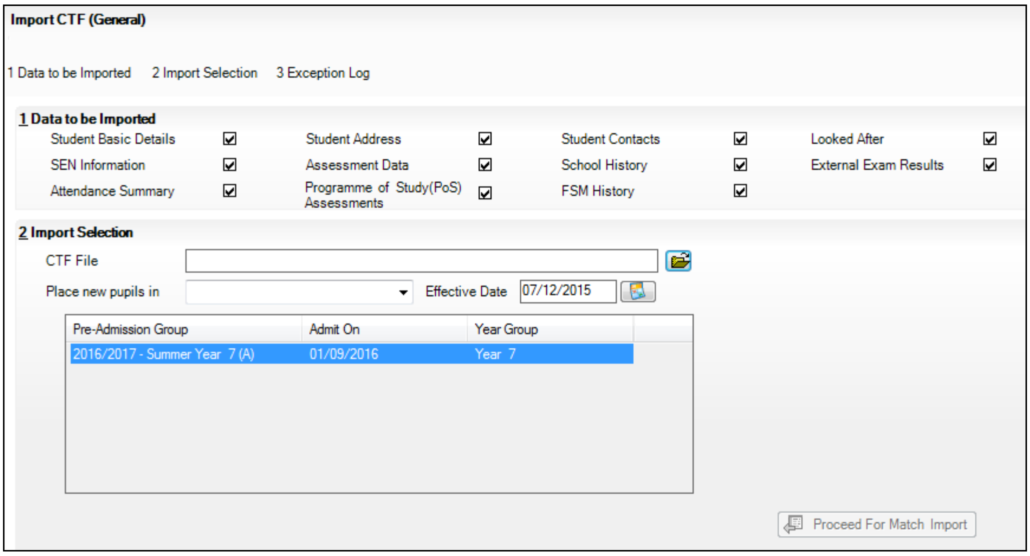
The corresponding number indicates the level of matching you wish to carry out, with level 1 being the most strict and 4 being the most flexible.

4. Select the required matching scale by clicking the required heading (e.g. **Match Surname and Forename**) or the required level number (e.g. **1**).

   Clicking the required matching scale displays in the bottom panel of the screen, more detailed information on the selected scale.

5. Confirm that you wish to implement the new matching scale by clicking the **Set Scale** button to display the **Import CTF** page.

*NOTE: The matching scale can be changed later in the process via the **Match and Import** panel on the **Import CTF** page.*



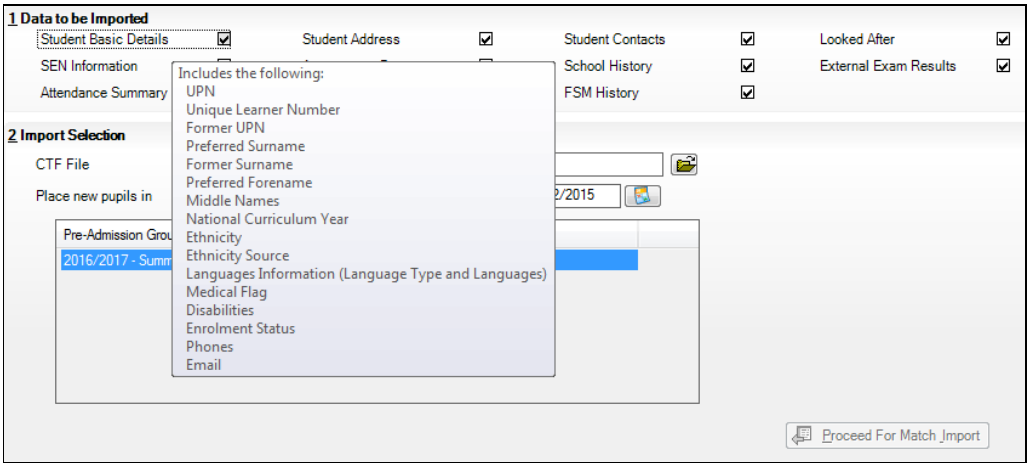
The categories of data that can be imported via CTF are displayed in the **Data to be Imported** panel. Any data item where the adjacent check box is selected indicates an item that will be imported by default.

*NOTES: The data items that will be imported by default are defined on the **Configure CTF Defaults** page (via **Tools | Setups | CTF**).*

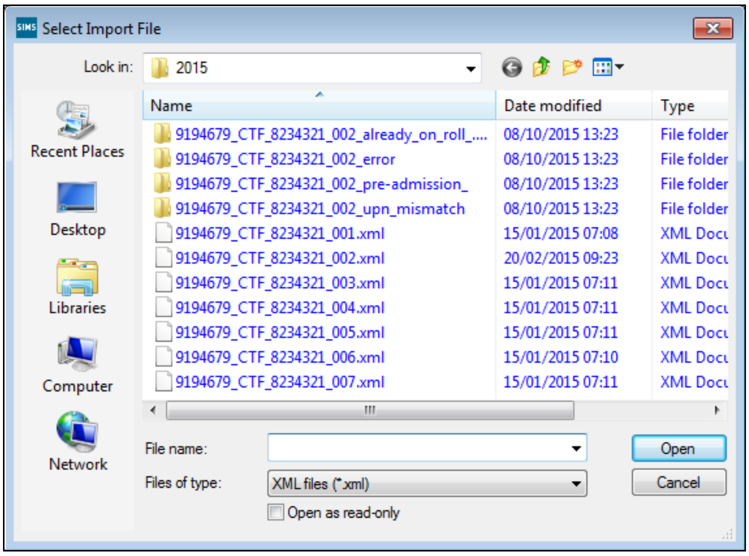
When importing a CTF, the enrolment status in a pupil/student's school history is now set to <null>.

Amend the default settings by selecting or deselecting the appropriate check box(es), if required.

TIP: Hover the mouse over each check box to view a list of the data in each section, as shown in the following graphic.



6. Select the CTF File you wish to import by clicking the **File Browser** button in the **Import Selection** panel to display the **Select Import File** dialog.



7. Navigate to and highlight the required CTF file then click the **Open** button to return to the **Import CTF** page.

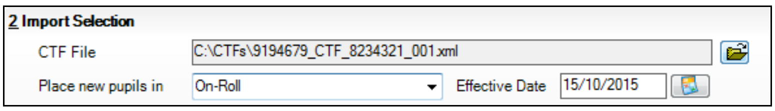
> *NOTE: Before the import takes place, SIMS checks that the CTF file you have selected is intended for your school by validating the header information contained in the file and the CTF file name. The header information contains the Local Authority number and Establishment Code for your school. If the file you are trying to import is not intended for your school, a warning message is displayed and the import should be abandoned. If the CTF file field appears red, the file is likely to be invalid. The file name should contain the Local Authority number/school number of the sending school and the Local Authority number/school number of the receiving school.*

8. Select whether you wish to place the pupil/students contained in the CTF file into a **Pre-Admission** group or **On-Roll** from the **Place new pupils in** drop-down list.

   If you wish to place them in a **Pre-Admission** group, highlight the required group in the table.

   If you wish to place them **On-Roll**, select an **Effective Date** (i.e. place them on-roll as of this date) by clicking the **Calendar** button then selecting the required date.

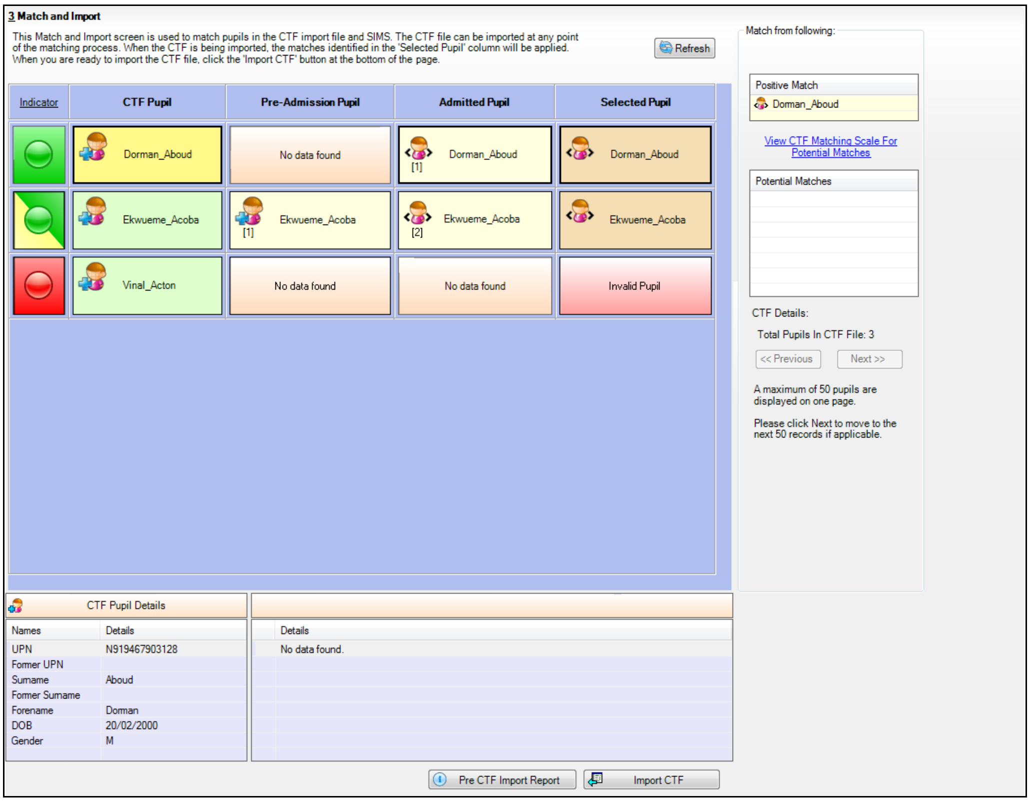
   If you select **Guest**, the **Effective Date** field is displayed, which defaults to today's date but can be amended by selecting from the Calendar. This enables data to be imported into SIMS (including group memberships) as of a specified date. Pupil/students imported as guests will not be allocated admission numbers or be registered for attendance.



You might wish to enter an earlier date if, for example, the CTF is received after the pupil/student has been admitted to the school. If the CTF is imported after the pupil/student has been admitted, their group memberships will commence as of the current date. Selecting an earlier date, i.e. when the pupil/student arrived at the school, enables the group memberships to be set accurately and without the need for manual intervention.

If you leave the date as the default, CTF import creates membership information (e.g. ethnic, religion, etc.) for an on-roll pupil/student as of the day of import, meaning you must change these membership dates manually to make them accurate, if required.

9. With the correct options selected, click the **Proceed For Match Import** button to display the **Match and Import** panel.



Matching Pupil/Students and Importing the CTF File

The CTF Matching routine enables you to define how a record in a CTF is imported into SIMS. It also enables you to select a record in the CTF that matches a record in your SIMS database then update the SIMS database with any missing details.

The method used to match a record in the CTF with a record in the SIMS database can be changed, enabling you to be as strict or as flexible as necessary.

> ***IMPORTANT NOTE:*** *The functionality provided by the* ***Match and Import*** *panel is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF using the original method by clicking the* ***Import CTF*** *button in the* ***Match and Import*** *panel without making any changes in this panel.*

The **CTF Pupil** column displays pupil/students who are either pre-admission or on roll.

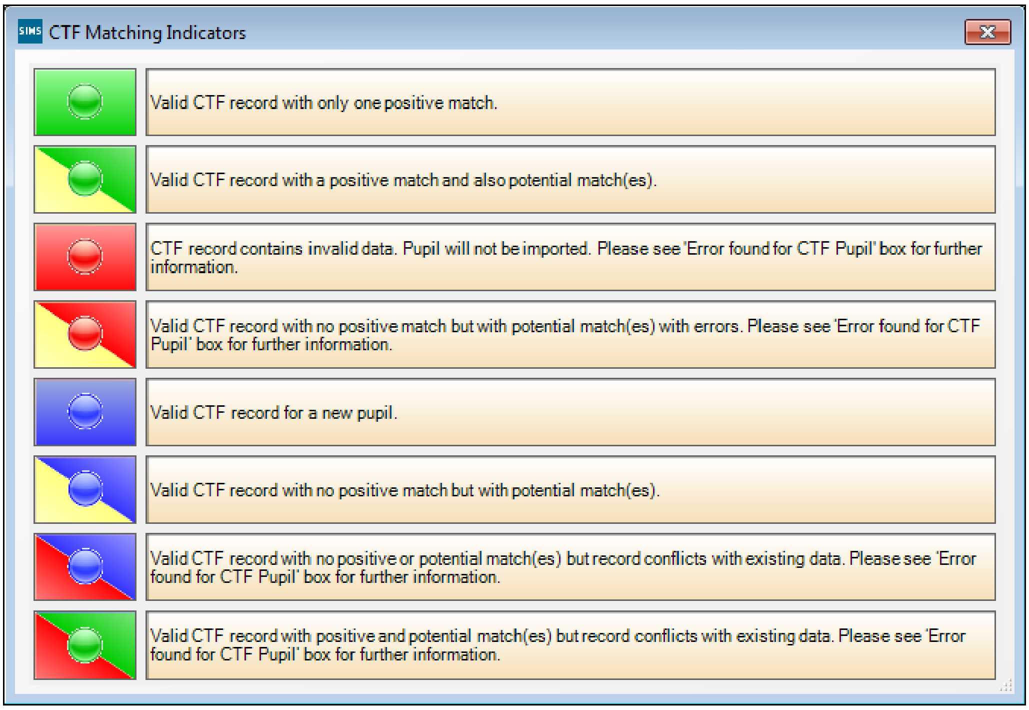
Pre-Admission Pupil/Student icon

On Roll Pupil/Student icon

CTF Matching Indicators

The **Match and Import** panel displays indicators that help you to identify whether the CTF record has any conflicts and shows how the pupil/student record will be imported into SIMS.

Click the **Indicator** link to display the **CTF Matching Indicators** dialog, which shows a detailed description of each indicator.



Exit the **CTF Matching Indicators** dialog to return to the **Match and Import** panel.

CTF Matching Scale

The **Match from following** panel includes a link that can be selected to show the **CTF Matching Scale** (**View CTF Matching Scale For Potential Matches**).

> *NOTE: The **CTF Matching Scale** is read-only. Any changes will need to be made by re-opening the **Import CTF** page by selecting **Routines | Data In | CTF | Import CTF**.*

Two grids are displayed in the **Match from following** panel.

- **Positive Match** – the record the CTF would match upon import if no action is taken.
- **Potential Matches** – could display more than one potential match from either the pre-admission or on-roll records.

The cell you select in the **Match and Import** panel will determine what is displayed in the **Match from following** section on the right-hand side of the panel.

- If you select a cell in the **CTF Pupil** column, all potential matches (whether on-roll or pre-admissions) will be displayed in the **Match from following** section on the right-hand side of the panel.
- If you select a cell in the **Pre-Admission Pupil** column then only pre-admission potential matches will be displayed.
- If you select a cell in the **Admitted Pupil** column then only the admitted potential matches will be displayed.
- If you select a cell in the **Selected Pupil** column then on-roll and pre-admission pupils will be displayed.

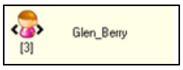
The users can agree with the system that the positive match is correct and leave as the **Selected Pupil** or they can double click on a potential match and then that match will become the **Selected Pupil** which is the CTF record that will be updated.

Additional Functionality

If you decide that the **Selected Pupil** and/or potential student/pupil(s) are incorrect matches, then right-click the **Selected Pupil** and select **Remove selection** to change the selection to a **New Pupil** or a **Conflicting Pupil**.

If you right-click the **CTF Pupil** column and select **Add as a new pupil**, the content of the **Selected Pupil** column changes from **Positive Match** or **Manual Match** to **New Pupil**.

If you right-click the **CTF Pupil** column and select **Do not import this pupil**, the selected pupil will not be imported.

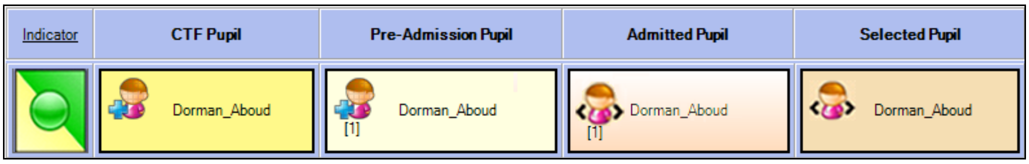


The number under the symbol reflects the number of matches found. The first name in the grid is displayed in the pupil cell but all matches are displayed in the **Match from following** grid.

Refreshing

Clicking the **Refresh** button when data in SIMS has been changed affects the pupil/students in the **Match and Import** panel.

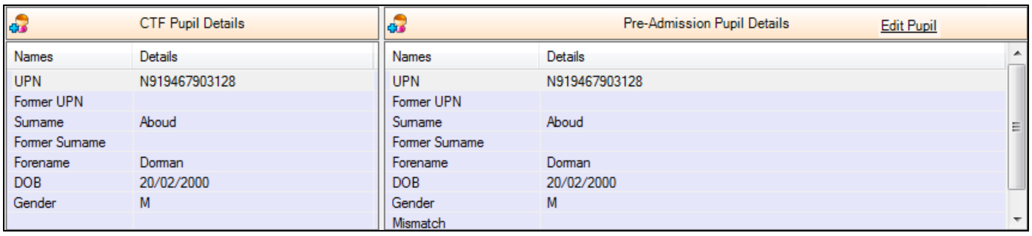
The following is an example of a change you may wish to make in the **Match and Import** panel.



Dorman Aboud has a UPN in CTF that matches the pre-admission pupil record in SIMS. However, you may wish to make the admitted pupil in SIMS match to the CTF record so that upon import all the information apart from the UPN will be imported to the admitted pupil.

You can delete the pre-admission record which will delete the UPN and allow it to be assigned to the admitted pupil.

1. Click the **Pre-Admission Pupil** cell to display the data for that pupil/student as shown in following graphic.



The graphic shows that UPNs match and the pre-admission UPN needs to be removed.

2. Right-click the **Edit Pupil** link on the right-hand side of the page then select **Go to Browser** to display the **Find Application** browser.
3. Search for and highlight the required pupil/student (Dorman Aboud in this example) then click the **Delete** button in the browser to delete the record.
4. Once the record has been deleted, click the **Back** button to return to the **Match and Import** panel and click the **Refresh** button to remove Dorman Aboud from the **Pre-Admission Pupil** column and allow the UPN to be imported against the admitted record upon import of the CTF.

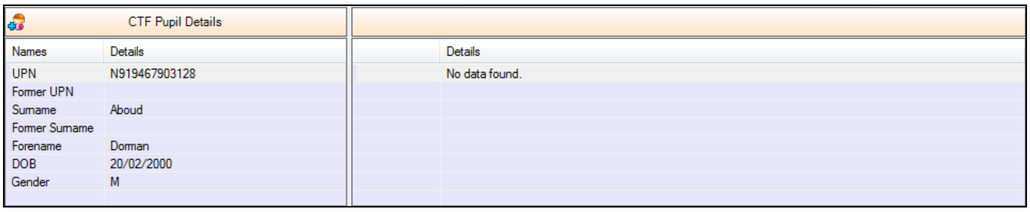
There are two panels at the bottom of the **Import and Match** panel. The first panel contains information about the CTF pupil/student that is taken from the CTF file. These include:

- UPN
- Former UPN
- Surname
- Former Surname
- Forename
- DOB
- Gender.

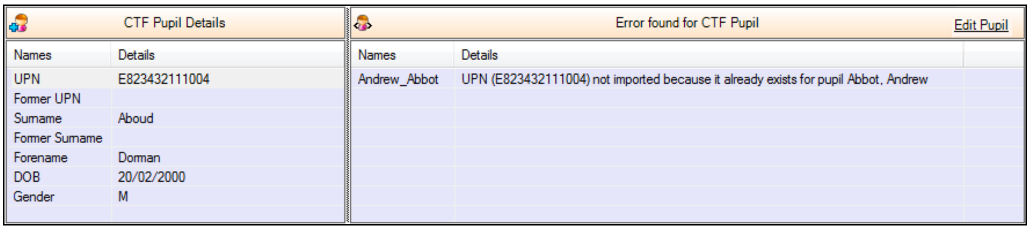
When you select a different pupil/student, the **CTF Pupil Details** panel changes.

The details in the second panel will differ depending on what cells you select.

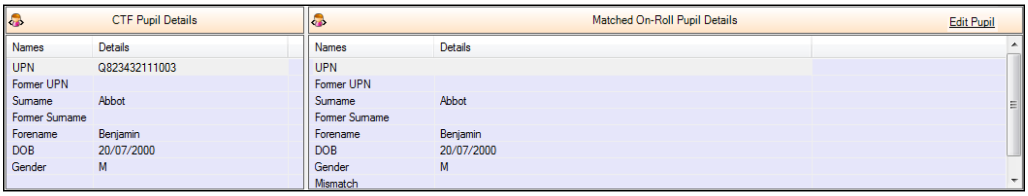
If the pupil/student selected does not have any conflicting errors with SIMS, the following graphic is displayed.



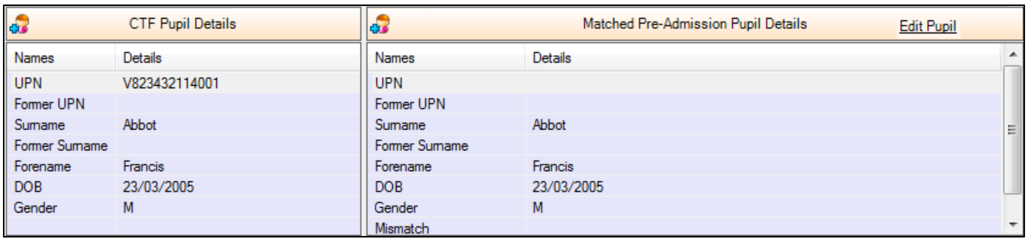
If the pupil/student selected has conflicting errors with SIMS then the **Error found for CTF Pupil** panel will be displayed.



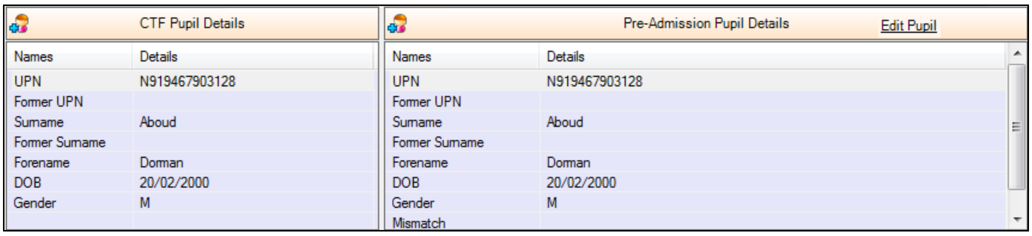
If the pupil/student selected in the **Selected Pupil** column is admitted or has ever been admitted, the **Matched On-Roll Pupil Details** will be displayed.



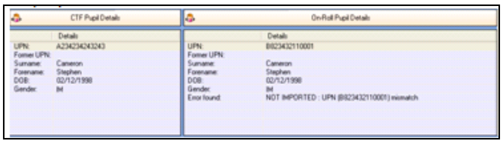
If you select a pupil/student in the **Selected Pupil** column and they are a pre-admission pupil then the **Matched Pre-admission Pupil Details** will be displayed.



If you select a pupil/student in the **Pre-Admission Pupil** column then the **Pre-Admission Pupil Details** box will be displayed.

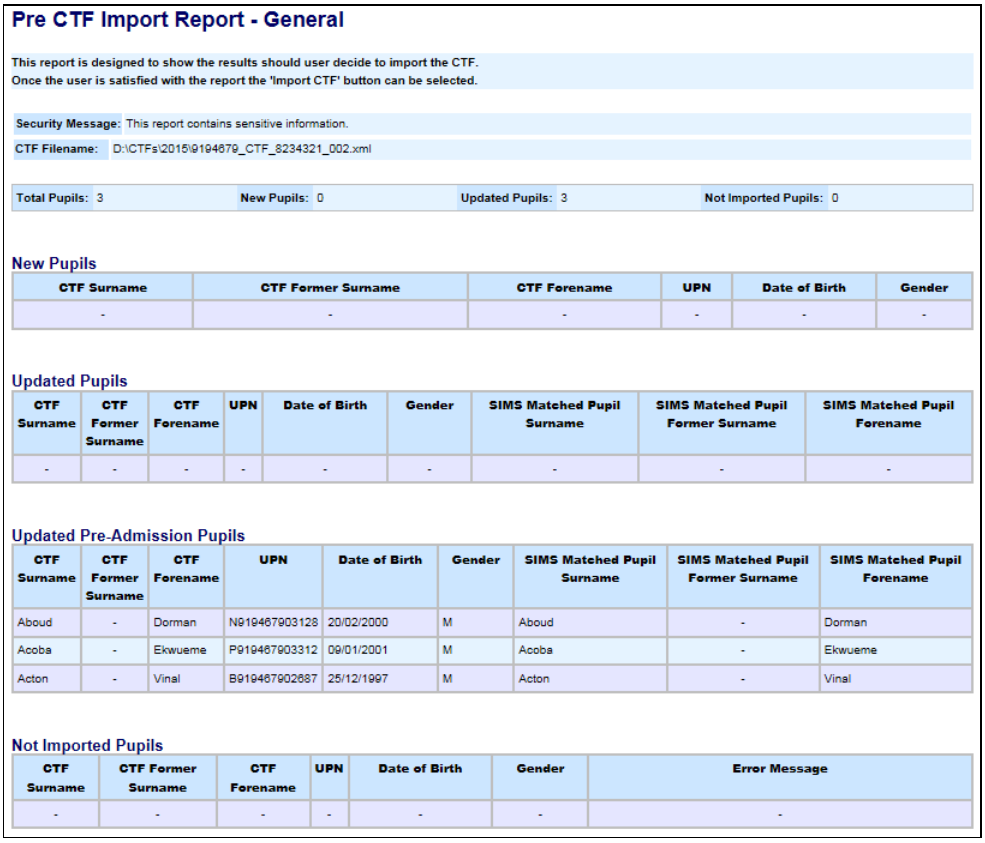


If you select a pupil/student in the **Admitted Pupil** column then the **On-Roll Pupil Details** box will be displayed.



Running the Pre CTF Import Report

The Pre CTF Import Report can be run to indicate what exactly will happen if you decide to import the CTF.



Pre CTF Import Report - General

This report is designed to show the results should user decide to import the CTF.
Once the user is satisfied with the report the 'Import CTF' button can be selected.

Security Message: This report contains sensitive information.
CTF Filename: D:\CTFs\2015\9194679_CTF_8234321_002.xml

Total Pupils: 3 **New Pupils:** 0 **Updated Pupils:** 3 **Not Imported Pupils:** 0

New Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender
-	-	-	-	-	-

Updated Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
-	-	-	-	-	-	-	-	-

Updated Pre-Admission Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
Aboud	-	Dorman	N919467903128	20/02/2000	M	Aboud	-	Dorman
Acoba	-	Ekwueme	P919467903312	09/01/2001	M	Acoba	-	Ekwueme
Acton	-	Vinal	B919467902687	25/12/1997	M	Acton	-	Vinal

Not Imported Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	Error Message
-	-	-	-	-	-	-

Importing the CTF

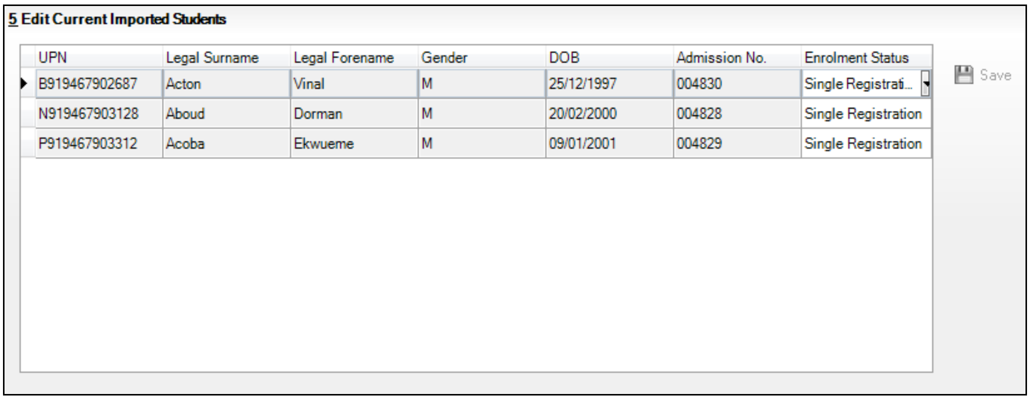
1. When you are satisfied with the selections that you have made, you can import the CTF by clicking the **Import CTF** button to begin the file import.

   Prior to importing a CTF, a message prompts you to check with the System Manager whether the Address Tidy and Merge routine has been run.

2. To continue with the import, click the **Yes** button. To cancel the process so that you can check with the System Manager, or to run the Tidy and Merge routine prior to CTF import, click the **No** button.

   New pupil/students are given an enrolment status of **Single Registration** by default, which can be subsequently changed through the **Pupil** (or **Student**) **Details** page at a later date if required. If pupil/students are imported into a preadmission group, they have a status of **Admitted** by default.

   An additional panel is displayed on the **Import CTF** page entitled **Edit Current Imported Students**. This panel allows basic information to be viewed and if required, the **Enrolment Status** can be edited by clicking in the required cell and then selecting the required status from the drop-down list. This panel is displayed <u>only</u> if new pupil/students are imported into SIMS.



5 Edit Current Imported Students

UPN	Legal Surname	Legal Forename	Gender	DOB	Admission No.	Enrolment Status
B919467902687	Acton	Vinal	M	25/12/1997	004830	Single Registrati...
N919467903128	Aboud	Dorman	M	20/02/2000	004828	Single Registration
P919467903312	Acoba	Ekwueme	M	09/01/2001	004829	Single Registration

The CTF is imported and the CTF Import Report is displayed, which explains what happens to the CTF pupil/student record once it is imported into SIMS. The report is saved in the Import CTF directory.

CTF Import Report - General

Security Message: This report contains sensitive information.

CTF Filename: D:\CTFs\2015\9194679_CTF_8234321_002.xml

Date Imported: 20/02/2015

Total Pupils: 3	New Pupils: 0	Updated Pupils: 3	Not Imported Pupils: 0

New Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender
-	-	-	-	-	-

Updated Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
-	-	-	-	-	-	-	-	-

Updated Pre-Admission Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
Aboud	-	Dorman	N919467903128	20/02/2000	M	Aboud	-	Dorman
Acoba	-	Ekwueme	P919467903312	09/01/2001	M	Acoba	-	Ekwueme
Acton	-	Vinal	B919467902687	25/12/1997	M	Acton	-	Vinal

Not Imported Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	Error Message
-	-	-	-	-	-	-

Once the CTF file has been imported, the Exception Log panel is displayed. This panel provides information on any errors that occurred during the import of the CTF file.

3. Click the **Save** button to keep your changes.
4. Once imported, it is advisable to check the details of each imported pupil/student.

Additional Resources:

Tidying Address Data in the *Housekeeping Routines* chapter of the *Setting up and Administering SIMS* handbook

More Information:

Viewing the CTF Import Exception Log on page *334*
Printing/Saving the CTF Import Exception Log on page *332*

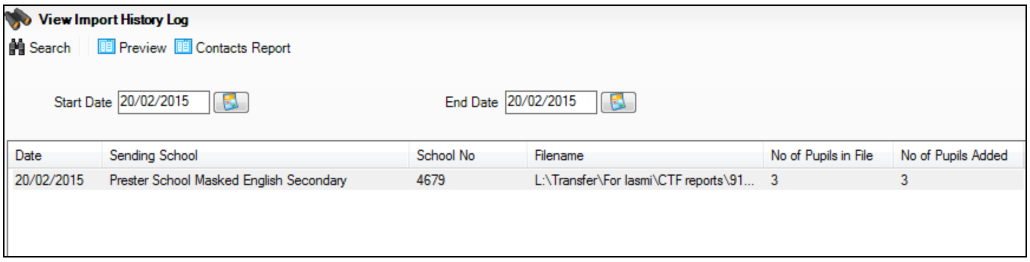
Printing/Saving the CTF Import Exception Log

The Exception Log can be printed by clicking the **Print** button. Alternatively, it can be saved as a `.txt` file by clicking the **Save** button.

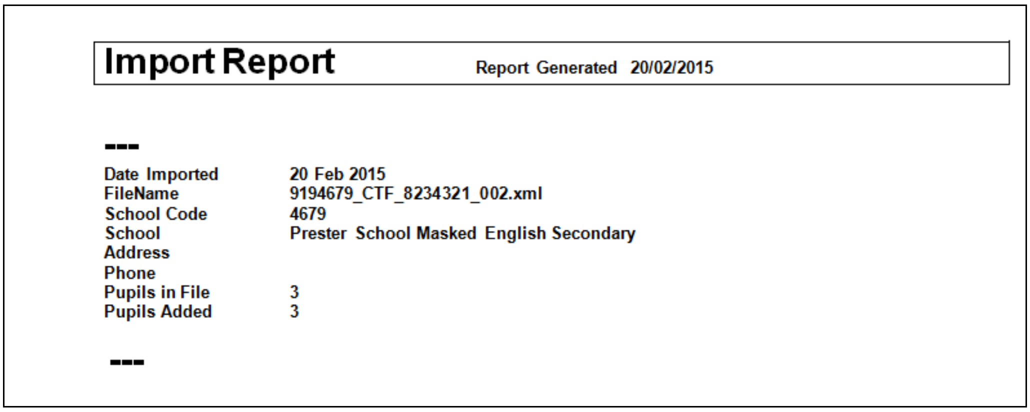
Viewing the CTF Import History Log

The CTF Import History Log provides a log of the CTF files that have previously been imported within a given timeframe. The log includes the **Date**, **Sending School**, **School No.**, **File Name**, **No of Pupils in File** and the **No. of Pupils Added**. This can be particularly useful if you are not sure whether a particular CTF file has already been imported.

1. Select **Routines | Data In | CTF | View Import History Log** to display the **View Import History Log** page.



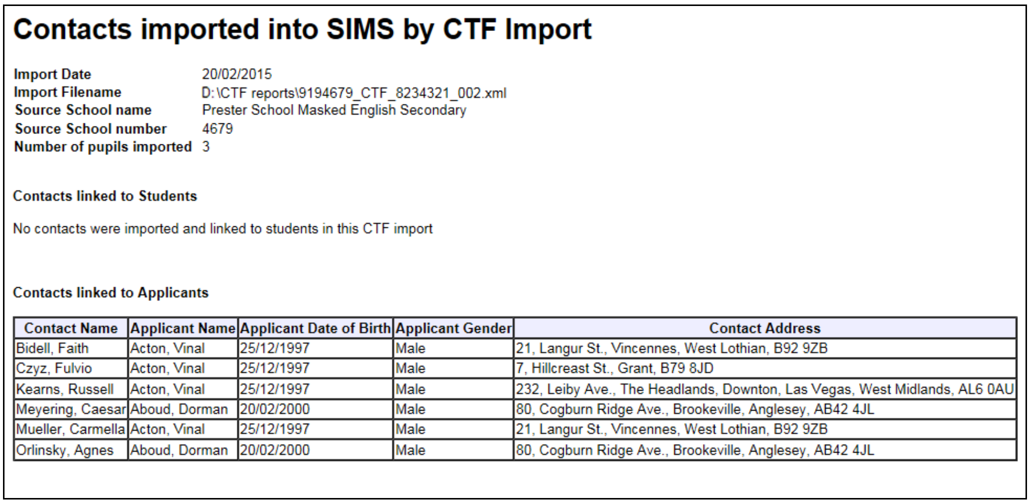
2. Specify the timeframe within which the CTFs were imported by entering the **Start** and **End dates** or clicking the **Calendar** buttons and selecting the required dates. The dates default to today.
3. Click the **Search** button to display a list of import logs that fall within the date range specified.
4. Click the **Preview** button to view a copy of the CTF report in Microsoft® Word which can be printed or saved as required.


Import Report   Report Generated 20/02/2015

Date Imported	20 Feb 2015
FileName	9194679_CTF_8234321_002.xml
School Code	4679
School	Prester School Masked English Secondary
Address	
Phone	
Pupils in File	3
Pupils Added	3

The report lists all the CTFs imported within the selected timeframe together with the date imported, file name, school code, school, address, phone number, the number of pupil/students in the file and the number of pupil/students added to the system.

5. Click the **Contacts Report** button to run a report in your web browser. This report shows the contacts of new or existing pupil/students or applicants that have been imported through a CTF.



Contacts imported into SIMS by CTF Import

Import Date	20/02/2015
Import Filename	D:\CTF reports\9194679_CTF_8234321_002.xml
Source School name	Prester School Masked English Secondary
Source School number	4679
Number of pupils imported	3

Contacts linked to Students

No contacts were imported and linked to students in this CTF import

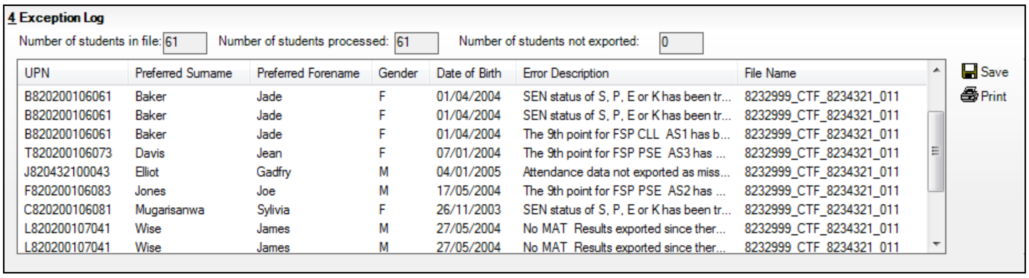
Contacts linked to Applicants

Contact Name	Applicant Name	Applicant Date of Birth	Applicant Gender	Contact Address
Bidell, Faith	Acton, Vinal	25/12/1997	Male	21, Langur St., Vincennes, West Lothian, B92 9ZB
Czyz, Fulvio	Acton, Vinal	25/12/1997	Male	7, Hillcreast St., Grant, B79 8JD
Kearns, Russell	Acton, Vinal	25/12/1997	Male	232, Leiby Ave., The Headlands, Downton, Las Vegas, West Midlands, AL6 0AU
Meyering, Caesar	Aboud, Dorman	20/02/2000	Male	80, Cogburn Ridge Ave., Brookeville, Anglesey, AB42 4JL
Mueller, Carmella	Acton, Vinal	25/12/1997	Male	21, Langur St., Vincennes, West Lothian, B92 9ZB
Orlinsky, Agnes	Aboud, Dorman	20/02/2000	Male	80, Cogburn Ridge Ave., Brookeville, Anglesey, AB42 4JL

IMPORTANT NOTE: *If the CTF import you have chosen was generated before the SIMS 2015 Spring Release, the Contacts Report will be blank but that does not necessarily mean that no contacts were imported by that import.*

Viewing the CTF Import Exception Log

Existing information stored in SIMS is deemed to be the most up to date and is therefore not overwritten by the content of the CTF. Any data anomalies identified during the import are recorded in the **Exception Log**.



4 Exception Log

Number of students in file: 61 Number of students processed: 61 Number of students not exported: 0

UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	The 9th point for FSP CLL AS1 has b...	8232999_CTF_8234321_011
T820200106073	Davis	Jean	F	07/01/2004	The 9th point for FSP PSE AS3 has ...	8232999_CTF_8234321_011
J820432100043	Elliot	Gadfry	M	04/01/2005	Attendance data not exported as miss...	8232999_CTF_8234321_011
F820200106083	Jones	Joe	M	17/05/2004	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_011
C820200106081	Mugarisanwa	Sylivia	F	26/11/2003	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011

Save
Print

The following information is displayed:

- **Number of children in file**: indicates the total number of pupil/students in the CTF file.
- **Number of children processed**: indicates the number of pupil/students contained in the newly imported CTF file who have been successfully processed by the system.
- **Number of new children**: This indicates the number of new pupil/students that the system has identified within the CTF file you have just imported.

Any children that the system has identified as having data anomalies are displayed together with their **UPN**, **Legal Surname**, **Legal Forename**, **Gender**, **Date of Birth** and an **Error Description** detailing the nature of the problem.

The following are common causes of import errors:

- missing core data
- missing or invalid UPNs
- data already exists

Any errors must be corrected before the pupil/student can be successfully imported.

Exporting CTFs

When pupil/students leave your school to attend another school, it is your responsibility to ensure that all available details are passed on to the new school. If you are a feeder school, you probably have a large number of pupil/students leaving at the same time, to the same destination school. It is standard practice to create a CTF for export to each of the destination schools.

One CTF file is created per destination school or Local Authority. However, it is possible to create up to six CTF files in one Export CTF process in SIMS, i.e. you can select up to six destination schools and/or Local Authorities.

Once generated, the CTF can be transferred by School to School (https://www.gov.uk/guidance/school-to-school-service-how-to-transfer-information) or other local secure file transfer mechanisms. Please check with your Local Authority if you are unsure which method to use.

Before Exporting a CTF

Before exporting CTFs you must ensure that:

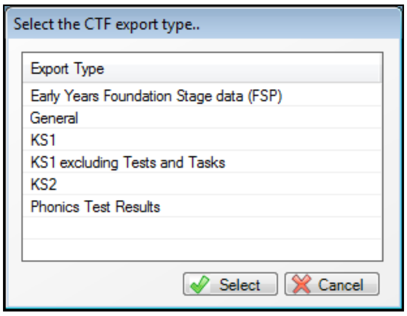
- the CTF configuration defaults have been set up via **Tools | Setups | CTF**. Please refer to the *Setting Up CTF Configuration Defaults* section in the *Setting Up and Administering SIMS* handbook.
- the destination schools are defined in your system via **Tools | Setups | Other Schools**.
- alternative destinations have been set up in **Tools | Setups | CTF**. These include unknown destinations (XXXXXXX), destinations for those moving outside the maintained sector (e.g. MMMMMMM) and/or for the NAA (e.g. NAALLLL).

IMPORTANT NOTE: *You are strongly advised to run the Address Tidy and Merge routine before importing or exporting a CTF to reduce the number of potential issues with regard to address matching.*

Selecting the Data to be Exported

The Core data (UPN, Surname, Forename, Gender and Date of Birth) is mandatory and is always exported.

1. Select **Routines | Data Out | CTF | Export CTF** to display the **Select the CTF export type** dialog.



This dialog enables you to create the following types of CTF:

- **Early Years Foundation Stage data (FSP)** - exports data relating to Early Years Foundation Stage pupils, enabling the results of the statutory Profile Aspects or Learning Goals that have been achieved by pupils to be transmitted to destination schools and LAs.
- **General** - produces a full CTF export file.
- **KS1** - creates a CTF file that contains information relating to Key Stage 1 results for pupil/students.
- **KS1 excluding Tests and Tasks -** exports Key Stage 1 data that do not include information for pupil/students' Tests and Tasks.
- **KS2** - exports a CTF file that contains information relating to Key Stage 2 results for pupil/students.
- **Phonics Test Results** - generates a CTF file for pupil/students who have Phonics Test Results data recorded. This type of CTF contains minimal tags.

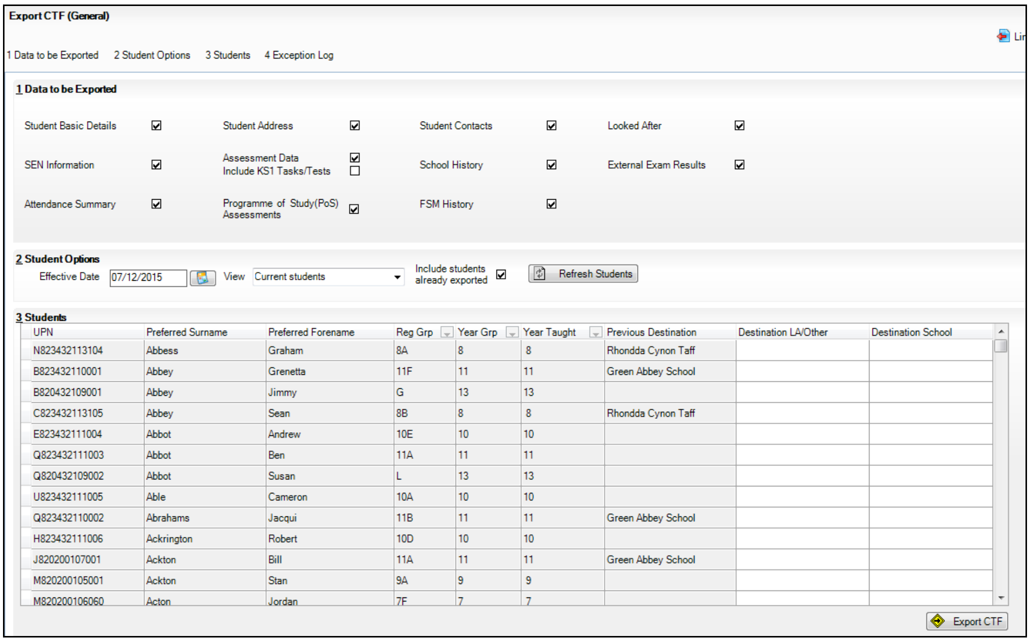
*NOTES: Additional options are enabled for schools in England to comply with the Children Missing in Education legislation. The **CME - Leavers** option enables a school to create a CML file that should be sent to a school's Local Authority when a pupil/student leaves school outside of what the Local Authority considers to be a normal phase transfer. The **CME - Joiners** option enables a school to create a CMJ file that should be sent from a school to their Local Authority when a pupil/student physically arrives in a school outside of what the Local Authority considers to be a normal phase transfer. Local Authorities can also request that these files be sent to them for pupil/students moving as part of a normal phase transfer.*

*Secondary schools in England are provided with additional options. The **ULN Request** option generates a CTF file for students who do not have a Unique Learner Number (ULN). This type of CTF contains minimal tags.*

*Secondary schools in Wales are provided with additional options. The **Welsh National Tests (WNT)** option exports students' National Test result data.*

2. Highlight the required CTF export type then click the **Select** button to display the relevant **Export CTF** page. The page name is appended with the option selected in the previous dialog.

> *NOTE: If **CME - Leavers**, **CME Joiners**, **ULN Request** or **Phonics Test Results** is selected, the **Data to be Exported** panel is not displayed in the following dialog.*



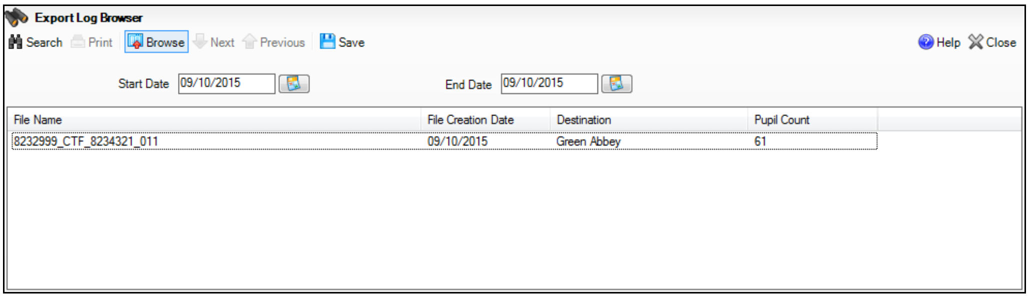
3. The data that is exported by default (as defined in **Tools | Setups | CTF**) is shown by the selected check boxes in the **Data to be Exported** panel. Amend this default data if required by selecting/deselecting any of the check boxes.

> *TIP: Hover the mouse over each check box to view a list of the data in each section, as shown in the following graphic.*

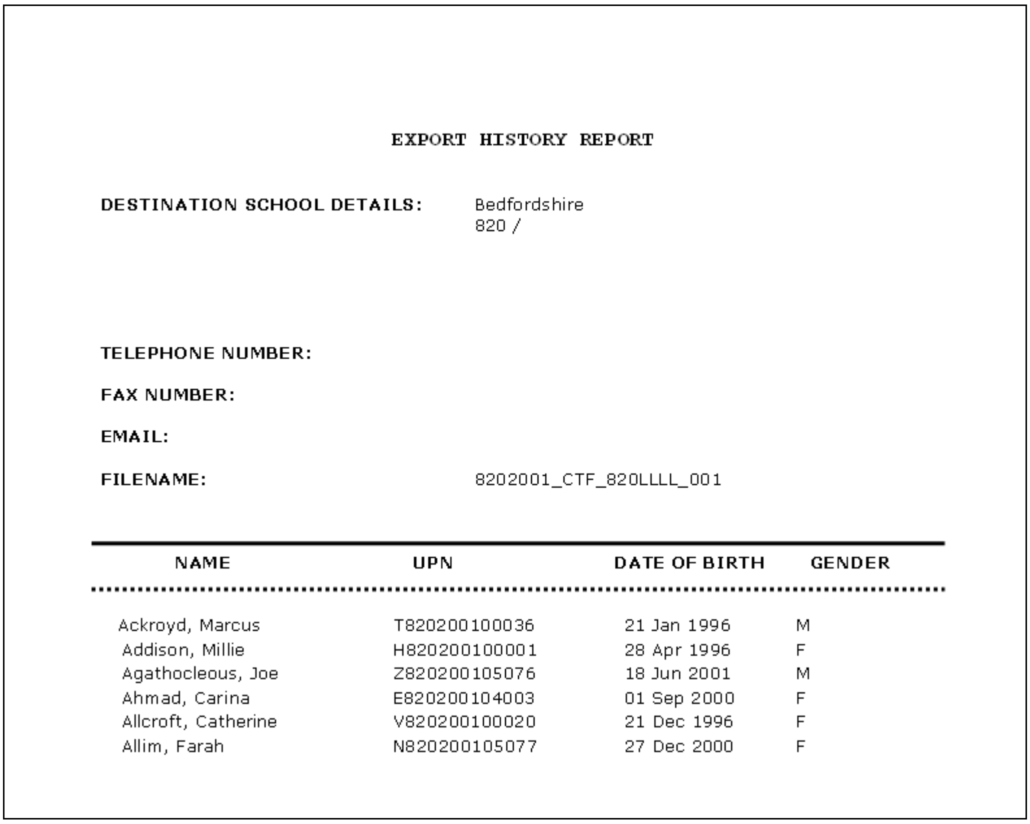
Viewing the CTF Export History Log

The CTF Export History Log provides a log of the CTF files that have previously been exported within a given timeframe. The log includes the **File Name**, **Creation Date**, **Destination** and **Pupil Count**.

1. Select **Routines | Data Out | CTF | View Export History Log** to display the **Export Log** browser.



2. Specify the timeframe in which the CTFs were exported by entering the **Start Date** and **End Date** or by clicking the **Calendar** buttons and selecting the required dates. These dates default to today's date.
3. Click the **Search** button to display a list of export logs that fall within the date range specified.
4. Highlight the required file and then click the **Preview** button to view a copy of the CTF report in Microsoft® Word, which can be printed or saved as required.



EXPORT HISTORY REPORT

DESTINATION SCHOOL DETAILS: Bedfordshire
820 /

TELEPHONE NUMBER:

FAX NUMBER:

EMAIL:

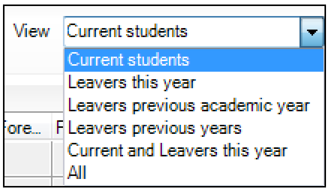
FILENAME: 8202001_CTF_820LLLL_001

NAME	UPN	DATE OF BIRTH	GENDER
Ackroyd, Marcus	T820200100036	21 Jan 1996	M
Addison, Millie	H820200100001	28 Apr 1996	F
Agathocleous, Joe	Z820200105076	18 Jun 2001	M
Ahmad, Carina	E820200104003	01 Sep 2000	F
Allcroft, Catherine	V820200100020	21 Dec 1996	F
Allim, Farah	N820200105077	27 Dec 2000	F

The report lists details of the destination school (or Local Authority) together with the name, UPN, date of birth and gender of the pupil/students included in the CTF. Details of the sending school are provided in the footer of the document and include the user name, number of pages, source school name and address.

Choosing the Pupil/Student Group

1. Select the **Effective Date** using the **Calendar** button in the **Pupil (or Student) Options** panel. This date must fall within the current academic year, and governs the cut-off point for the exclusion of the selected pupil/students, based on the **View** settings (see step *2* for more information).
2. Select the type of pupil/students to be included in the CTF file from the **View** drop-down list, e.g. **Leavers this year**. The selection made here governs the impact of the selected **Effective Date**.

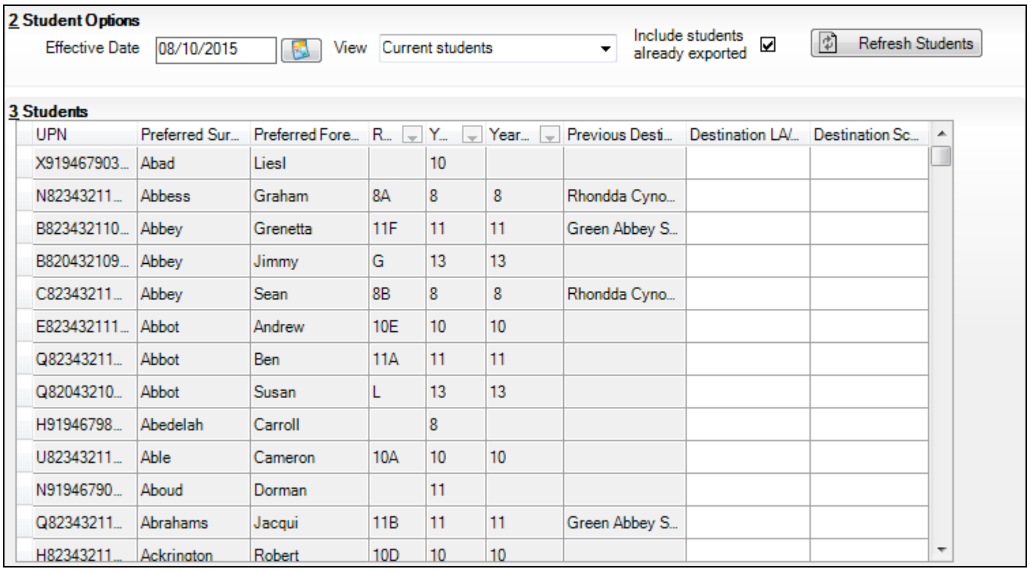
   It is possible to place on-roll pupil/students and leavers in the same CTF file. This is useful when sending end of Key Stage results to the National Assessment Agency. To do this, select **Current and Leavers this year** from the **View** drop-down list.

   > *NOTES: Selecting **All** from the **View** drop-down list displays all students, and therefore the **Effective Date** filter is not applicable.*
   >
   > *Selecting **Leavers previous years** displays all students who have left your school in all previous years, and therefore the **Effective Date** filter is not applicable.*

3. Pupil/students who have already been included in previously created CTFs do not appear in the list by default. If you wish to include these pupil/students, select the **Include Students Already Exported** check box.
4. Click the **Refresh Students** button to update the list of pupil/students displayed, based on your selections.

   For example, if you select an **Effective Date** of **8/10/2015** and a **View** of all **Current Students**, then clicking the **Refresh Students** button updates the list to display all pupil/students who were on-roll at your school from the beginning of the academic year to 8 October 2015.

NOTE: Schools in England that selected to produce a ULN Request/Update CTF will be presented with the ***ULN*** *column in the following display.*



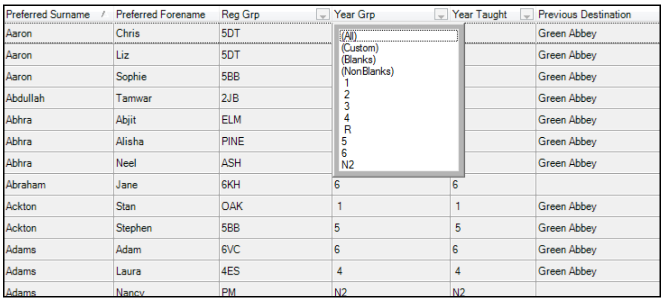
UPN	Preferred Sur...	Preferred Fore...	R...	Y...	Year...	Previous Desti...	Destination LA/...	Destination Sc...
X919467903...	Abad	Liesl		10				
N82343211...	Abbess	Graham	8A	8	8	Rhondda Cyno...		
B823432110...	Abbey	Grenetta	11F	11	11	Green Abbey S...		
B820432109...	Abbey	Jimmy	G	13	13			
C82343211...	Abbey	Sean	8B	8	8	Rhondda Cyno...		
E823432111...	Abbot	Andrew	10E	10	10			
Q82343211...	Abbot	Ben	11A	11	11			
Q82043210...	Abbot	Susan	L	13	13			
H91946798...	Abedelah	Carroll		8				
U82343211...	Able	Cameron	10A	10	10			
N91946790...	Aboud	Dorman		11				
Q82343211...	Abrahams	Jacqui	11B	11	11	Green Abbey S...		
H82343211...	Ackrington	Robert	10D	10	10			

Changing the **View** to **Current and Leavers this year** and clicking the **Refresh Students** button displays a list of all pupil/students who were on-roll, and all pupil/students who left your school, from the beginning of the academic year to 8 October 2015.

Changing the **View** to **Leavers previous years** and clicking the **Refresh Students** button displays a list of all pupil/students who left in all previous academic years, regardless of the **Effective Date**.

Filtering and Sorting the Pupil/Student View

Once the required group of pupil/students are listed, it is then possible to filter and sort the list based on your requirements. There are a number of filtering and sorting options that can be selected by right-clicking in the heading of each column as follows:

<table>
<tr><td>Sort Ascending</td><td>Sorts the grid in ascending order based on the selected column (e.g. right-clicking the Surname column heading sorts in Surname ascending order, i.e. A-Z). This can also be achieved by clicking column headings – click once for ascending and again for descending order.</td></tr>
<tr><td>Sort Descending</td><td>As previous, but in descending order, i.e. Z-A.</td></tr>
<tr><td>Best Fit</td><td>Sizes the selected column to fit the contents.</td></tr>
<tr><td>Can Filter</td><td>Allows you to filter the rows that are displayed based on a value selected from the column. For example, right-clicking the Year Grp column and selecting Can Filter from the pop-up menu adds a down arrow to the column heading (if this is not already visible). Clicking this down arrow displays a drop-down list of all the values (such as each of the available years) in the column. Select the required value to filter the list based on the value, such as displaying Year 6 only, as shown in the following graphic:


NOTE: The presence of a down arrow in a column heading indicates that filtering is possible. You can switch on filtering (if an arrow is not visible) by right-clicking the column heading and selecting Can Filter, as previously described.</td></tr>
<tr><td>Clear Filter</td><td>Removes any filter applied.</td></tr>
<tr><td>Best Fit (all columns)</td><td>Sizes all columns to fit the contents.</td></tr>
</table>

Specifying the Destination Local Authority or the Destination School

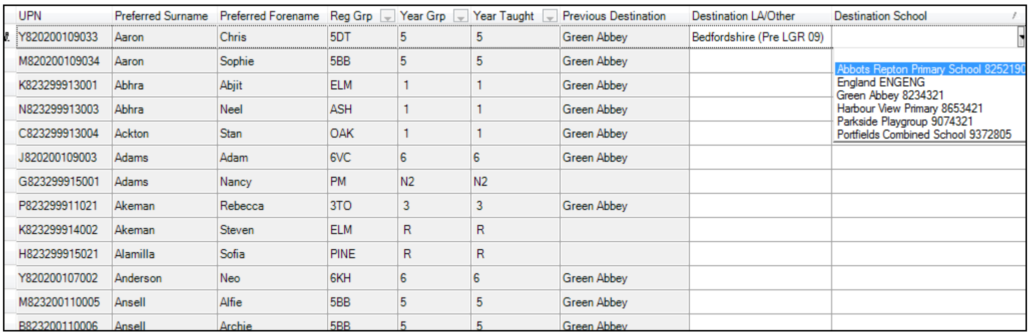
It is possible to select the destination Local Authority or the destination school for individual pupil/students, or manually select a group of pupil/student and select the same destination Local Authority or destination school for that group. A CTF file is created for each destination school or Local Authority.

NOTES: It is possible to select up to six schools or Local Authorities in only one export CTF process. You therefore need to repeat this process if more than six are required.

For Individual Pupil/Students

To select a value for an individual pupil/student, click the far right-hand side of the cell in the **Destination LA/Other** or **Destination School** column and select the required value from the drop-down list.

> *NOTES: To enable the transfer of CTF files between parallel systems when trialling new applications, you can now select your own school's name from the **Destination School** drop-down list.*
>
> *To facilitate the selection of the correct school where there are multiple similarly named schools, the **Destination School** drop-down list now displays the school name, the LA Number and the Establishment Number (or the DENI Number for schools in Northern Ireland).*

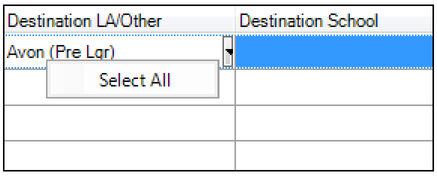


UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/Other	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Bedfordshire (Pre LGR 09)	
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey		
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey		
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey		
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey		
J820200109003	Adams	Adam	6VC	6	6	Green Abbey		
G823299915001	Adams	Nancy	PM	N2	N2			
P823299911021	Akeman	Rebecca	3TO	3	3	Green Abbey		
K823299914002	Akeman	Steven	ELM	R	R			
H823299915021	Alamilla	Sofia	PINE	R	R			
Y820200107002	Anderson	Neo	6KH	6	6	Green Abbey		
M823200110005	Ansell	Alfie	5BB	5	5	Green Abbey		
B823200110006	Ansell	Archie	5BB	5	5	Green Abbey		

For Groups of Pupil/Students

To select the same value for all the pupil/students in a column:

- Click to highlight any individual cell in either the **Destination LA/Other** or **Destination School** column, as required. Right-click anywhere on the grid and choose **Select All** from the pop-up menu.



This highlights the remaining rows in blue (i.e. the chosen column remains white).

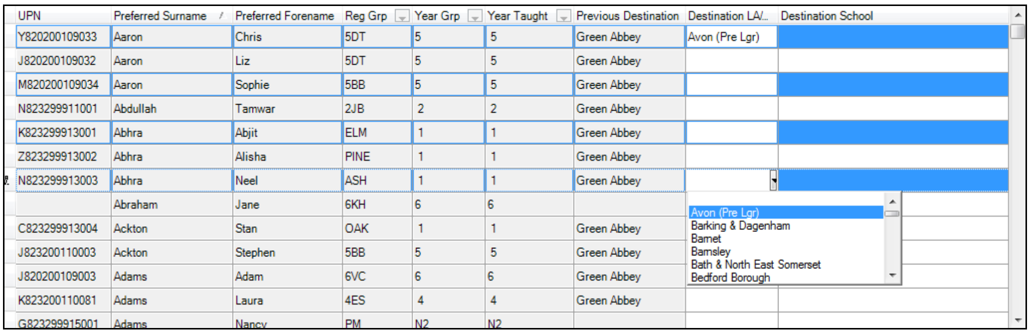
UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Previous Destination	Destination LA/...	Destination School
Y820200109033	Aaron	Chris	5DT	5	5	Green Abbey	Avon (Pre Lgr)	
M820200109034	Aaron	Sophie	5BB	5	5	Green Abbey		
N823299911001	Abdullah	Tamwar	2JB	2	2	Green Abbey		
K823299913001	Abhra	Abjit	ELM	1	1	Green Abbey		
N823299913003	Abhra	Neel	ASH	1	1	Green Abbey		
	Abraham	Jane	6KH	6	6			
C823299913004	Ackton	Stan	OAK	1	1	Green Abbey		
J820200109003	Adams	Adam	6VC	6	6	Green Abbey		
K823200110081	Adams	Laura	4ES	4	4	Green Abbey		
G823299915001	Adams	Nancy	PM	N2	N2			
P823299911021	Akeman	Rebecca	3TO	3	3	Green Abbey		
W823299914001	Akeman	Richard	ELM	R	R			
K823299914002	Akeman	Steven	ELM	R	R			

- Click the down arrow in the data entry column (which has a white background) and select the required value, e.g. **Avon (Pre Lgr)**.

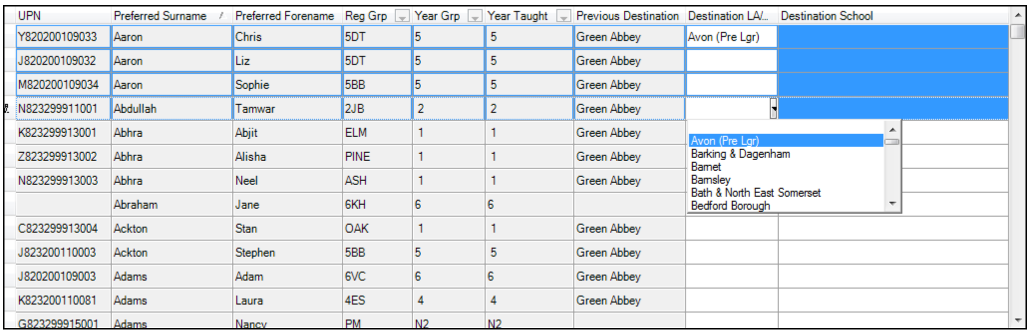
Once selected, the entire column is populated with the selected value.

To select values for specific pupil/students:

- To select randomly ordered pupil/students, hold down the **Ctrl** key and click the row of each required pupil/student to highlight them. Release the **Ctrl** key and then click the down arrow of the last highlighted cell (which has a white background) and select the required value.



- To enter values for sequentially listed pupil/students, click the first pupil/student, hold down the **Shift** key, then click the last required pupil/student in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key). The selected cells are highlighted in blue. Release the **Shift** key, then click the down arrow of the last highlighted cell (which has a white background) and select the required value.



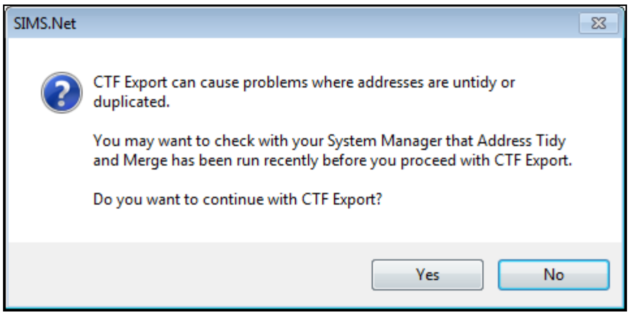
> *NOTES: To enable the transfer of CTF files between parallel systems when trialling new applications, you can now select your own school's name from the **Destination School** drop-down list.*
>
> *To facilitate the selection of the correct school where there are multiple similarly named schools, the **Destination School** drop-down list now displays the school name, the LA Number and the Establishment Number (or the DENI Number for schools in Northern Ireland).*

Creating the CTF Export File(s)

1. Once you have completed selecting the **Destination LA/Other** or **Destination School** for the required pupil/students, click the **Export CTF** button.

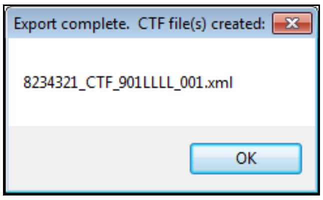
   Prior to exporting a CTF, a message prompts you to check with the System Manager whether the Address Tidy and Merge routine has been run.

2. To continue with the export, click the **Yes** button. To cancel the process in order to check with the System Manager, or to run the Tidy and Merge routine prior to CTF export, click the **No** button.



   The CTF file(s) are now created, one for each destination school and Local Authority specified previously (up to a maximum of six).

3. Once the CTF has been created, a message is displayed. The name of the CTF created is also displayed.



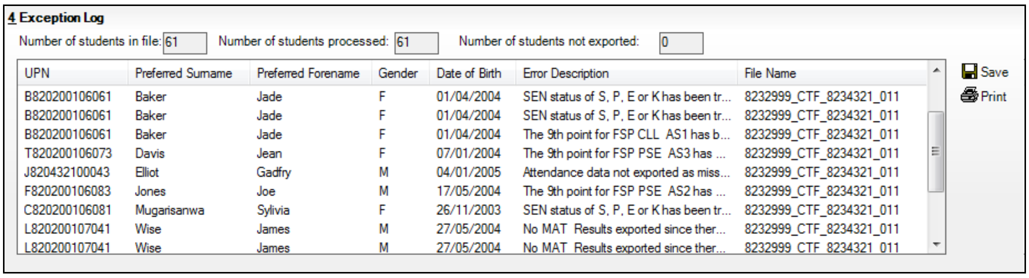
4. Click the **OK** button to complete the process.

Additional Resources:

Tidying Address Data in the Housekeeping Routines chapter of the *Setting Up and Administering SIMS* handbook

Viewing the CTF Export Exception Log

Any errors are displayed in the **Exception Log** panel:



UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	The 9th point for FSP CLL AS1 has b...	8232999_CTF_8234321_011
T820200106073	Davis	Jean	F	07/01/2004	The 9th point for FSP PSE AS3 has ...	8232999_CTF_8234321_011
J820432100043	Elliot	Gadfry	M	04/01/2005	Attendance data not exported as miss...	8232999_CTF_8234321_011
F820200106083	Jones	Joe	M	17/05/2004	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_011
C820200106081	Mugarisanwa	Sylivia	F	26/11/2003	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011

The following information is displayed:

- **Number of Pupil (or Students) in file**: indicates the total number of pupil/students in the CTF file.
- **Number of Pupil** (or **Student**) **processed**: indicates the number of pupil/students contained in the newly exported CTF file who have been successfully processed by the system.
- **Number of Pupil** (or **Student**) **not exported**: This indicates the number of new pupil/students that were not included in the CTF file you have just exported.

Any pupil/students that the system has identified as having data anomalies are displayed together with their **UPN**, **Surname**, **Forename**, **Gender**, **Date of Birth**, an **Error Description** detailing the nature of the problem and **File Name**.

The following are common causes of import errors:

- missing core data
- missing or invalid UPNs
- data already exists

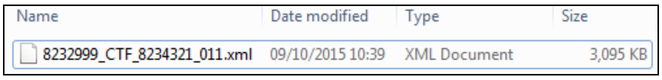
Some errors are for information only. If there is a figure in the **Number of students not exported** field then the appropriate error must be corrected before the pupil/student(s) can be successfully included in the CTF export file.

Printing/Saving the CTF Export Exception Log

The Export Exception Log can be printed by clicking the **Print** button. Alternatively, it can be saved as a `.txt` file by clicking the **Save** button.

Sending/Transferring the CTF file

Navigate to the location of the **CTF Export Directory** as defined in **Tools | Setups | CTF** and identify the newly created XML file for export.



Name	Date modified	Type	Size
8232999_CTF_8234321_011.xml	09/10/2015 10:39	XML Document	3,095 KB

The first seven digits of the file name represent your Local Authority number and your establishment number (as the sending school). The other seven digits represent the destination school's Local Authority number and establishment number.

*NOTE: Over time, a number of files may be created that are destined for the same school and Local Authority. As a consequence, the file names may have the same name. If this is the case, the most recent file created can be identified by the **Date Modified**.*

Once generated, the CTF can be transferred by School to School (https://www.gov.uk/guidance/school-to-school-service-how-to-transfer-information) or other local secure file transfer mechanisms. Please contact your Local Authority if you are unsure which method to use.

12| Recording Leavers and Deleting Pupil/Student Records

Deleting Pupil/Students

You must be a member of the *School Administrator* user group in System Manager to delete a pupil/student record.

> ***IMPORTANT NOTE:*** *This process is irreversible and is only for deleting erroneous records. You may wish to carry out a backup before proceeding. This process should not be used for pupil/students who are leaving the school or have been permanently excluded.*

A pupil/student should be deleted only if:

- they have been entered in error.
- their record is a duplicate.
- they have been recorded as on-roll prior to their arrival, but they subsequently choose to attend another school.

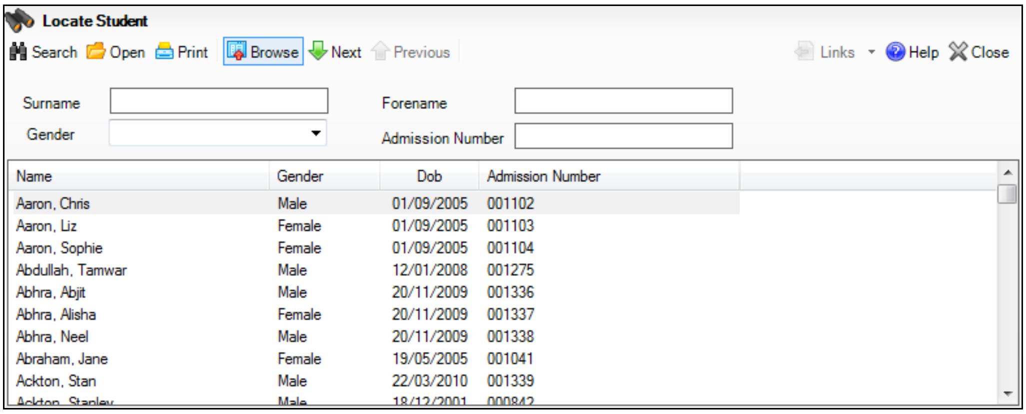
When a pupil/student is deleted, all their associated records are completely removed from the system, including any documents attached to their record (such as letters, medical notes, etc.).

> *NOTE: If you are deleting a duplicate record, ensure that (if necessary) any required data is added to the record you intend to keep.*

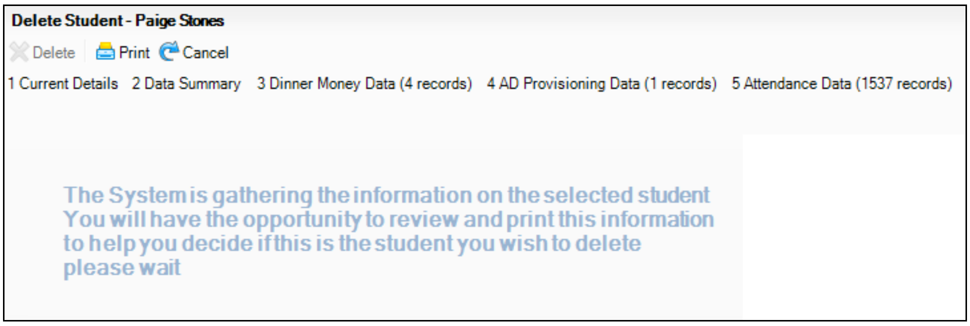
It is not possible to delete a pupil/student if they have any of the following details recorded against them:

- Examination Entries
- Education Maintenance Allowance
- CONNEXIONS record

1. Select **Routines | Pupil** (or **Student**) **| Delete Pupil** (or **Student**) to display the **Locate Student** browser.



2. Search for the pupil/student to be deleted by entering any combination of their **Surname**, **Forename** or **Admission Number**, or select their **Gender** from the drop-down list, then click the **Search** button.
3. Highlight the required pupil/student then click the **Open** button to view their details. There may be a slight delay while the system gathers their associated records. The following message is displayed during this process.

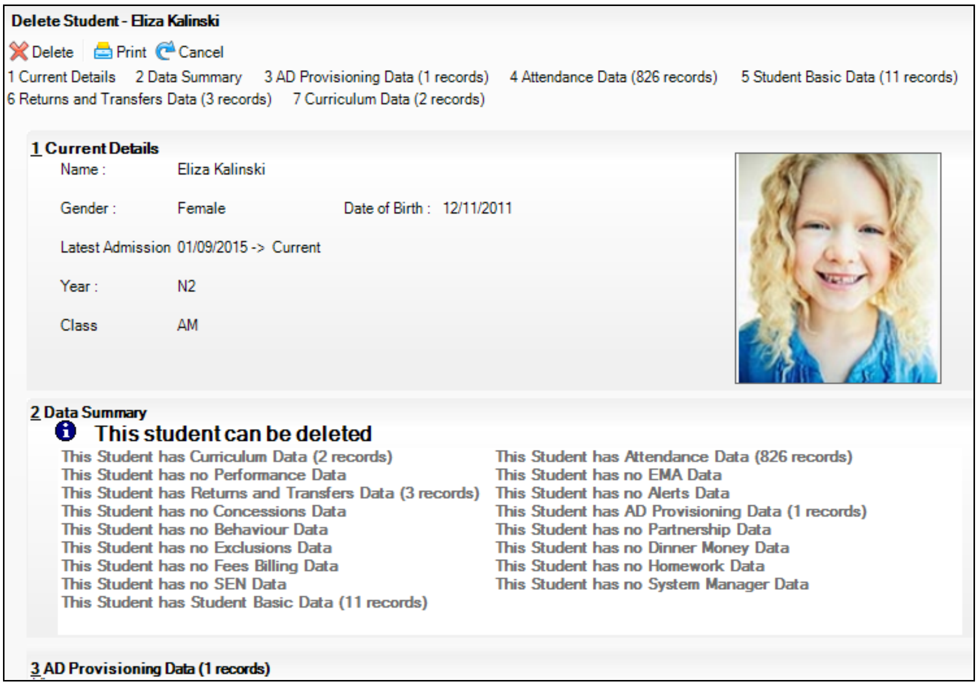


The **Current Details** are displayed together with a **Data Summary** which lists whether the pupil/student can be deleted and shows the number of associated records that will be removed.

The following categories of data are reported on:

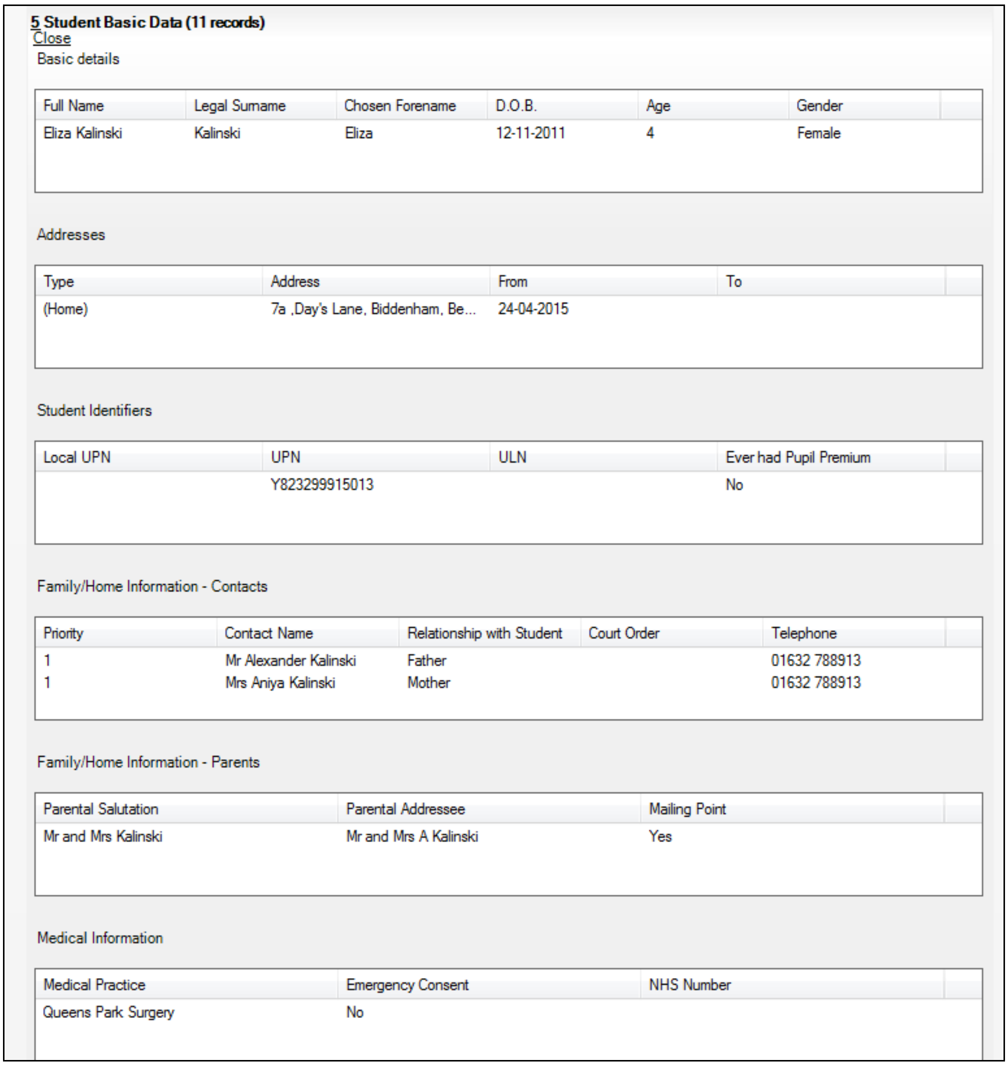
- Curriculum Data (including timetable and classes)
- Performance Data (including assessments, exam entries and results)
- Returns and Transfers Data
- Concessions Data
- Behaviour Data
- Exclusions Data
- SEN Data
- Student Basic Data

- Attendance Data (including attendance and lesson marks).



If specific data is available within a category, an individual section is displayed on the page as shown in the following graphic.

Click the **View** hyperlink to review the detailed information within the category if required.



NOTE: If there is no information for a particular category, that category is not displayed.

4. It is advisable to print the contents of the **Delete Pupil** (or **Student**) page for future reference by clicking the **Print** button on the toolbar.

NOTE: Each category is automatically expanded before printing to ensure the printout contains all the information stored for that pupil/student. It is therefore not necessary to expand each category before printing.

5. Once you have reviewed the details and are confident you wish to proceed, click the **Delete** button on the toolbar.

IMPORTANT NOTE: *Please note that this process is irreversible.*

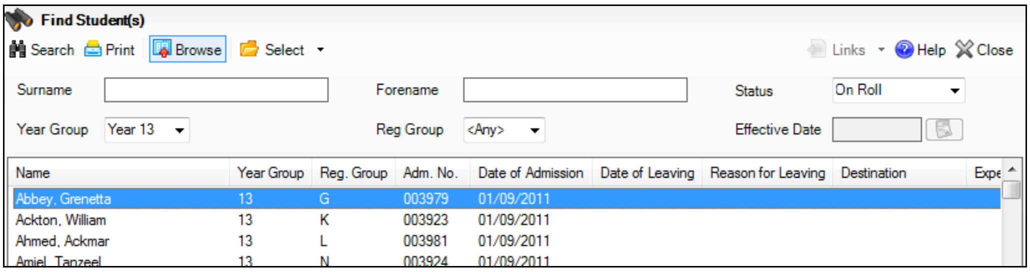
6. A message dialog prompts for confirmation that you wish to proceed. Click **Yes** to proceed (or **No** to cancel the process).
7. A dialog is displayed confirming that the deletion has been completed. Click **OK**.

Recording Leavers

If a pupil/student leaves your school for any reason, you can mark them as a leaver which removes them from your school, but enables historical records to be kept. During the Summer term, for example, you need to mark most or all pupil/students in your top year as leavers so that they are no longer on-roll at the start of the new academic year. The date of leaving and leaving destination, together with the reason for leaving can be recorded.

> ***IMPORTANT NOTES:*** *To ensure that historical data is accurately maintained, it is essential that you do not record leavers by removing their date of admission.*
>
> *If a pupil/student who was a leaver subsequently returns, please ensure that you re-admit them – do not remove the date of leaving (please see* Re-admitting Pupil/Students *on page* 302*).*
>
> *To ensure that information required for statutory returns (e.g. the School Census) is accurate and up-to-date, check that the leavers have been given an SEN Status* <u>*other*</u> *than* ***Not Assigned*** *and that an* ***Ethnicity*** *has been recorded before making the pupil/student a leaver.*

1. Select **Routines** | **Pupil** (or **Student**) | **Leavers** to display the **Find Student(s)** browser.



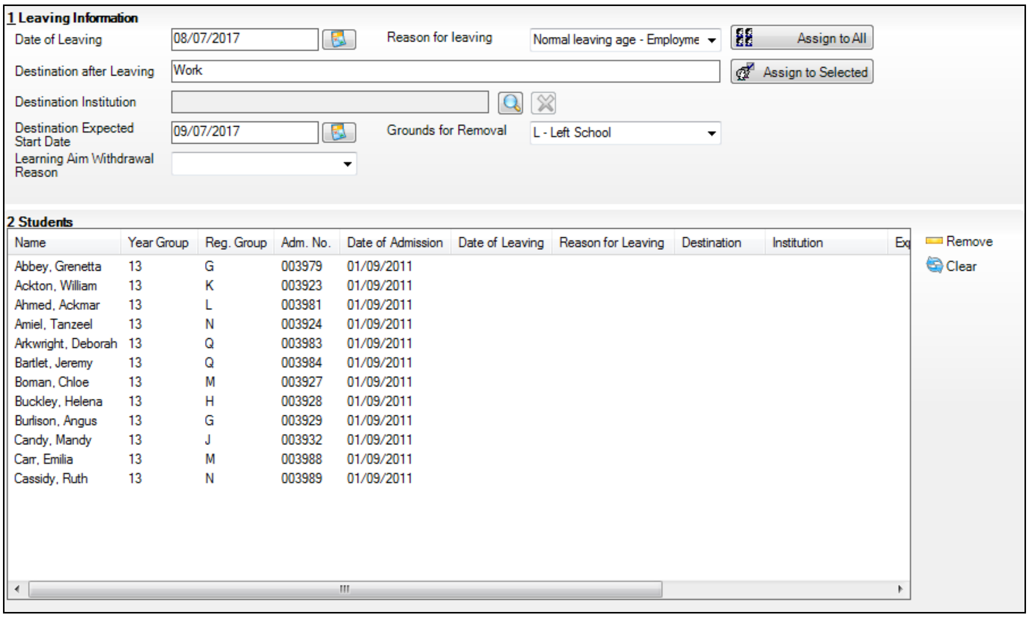
2. Search for the required **Year** or **Reg Group** (or **Class**) by selecting from the appropriate drop-down lists and then click the **Search** button.

   To select all the pupil/students displayed in the browser, click the **Select** button down arrow and select **All** from the drop-down menu.

   To select a group of pupil/students, highlight them using any of the following methods:

   - Hold down the **Ctrl** key and single-click each required pupil/student.
   - To highlight sequentially listed children, single-click the first pupil in the list, hold down the **Shift** key then click the last required pupil in the list.

3. Once the required pupil/students have been highlighted, click the **Select** button. The selected pupil/students are then transferred to the **Students** panel.



4. Enter the **Date of Leaving** or click the **Calendar** button and select the required date.

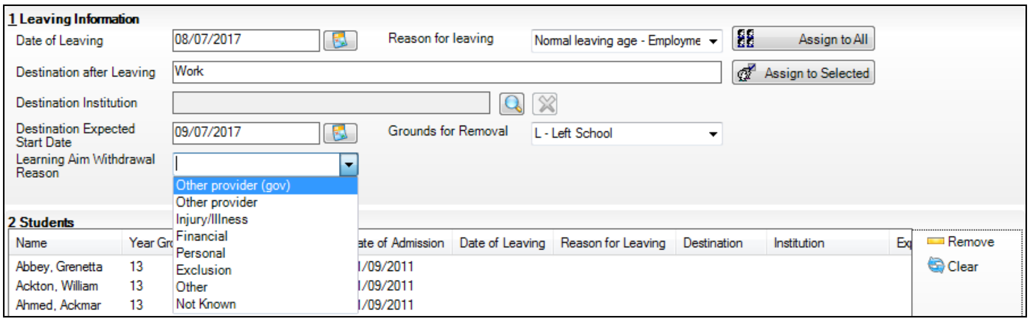
 *Calendar button*

This date of leaving should be the date that the pupil/student is actually leaving the school if they are not for transferring from Junior/Primary to Secondary phase. Local Authorities normally specify the dates to be used for school transfers so that they match. For example, some authorities prefer not have any gaps between dates and may suggest a date of leaving (the old school) of 4th September and the date of admission (into the new school) of 5th September. If you are in any doubt, please contact your Local Authority for advice.

> ***IMPORTANT NOTE:*** *It is recommended that pupil/students leaving at the end of Year 11 who may return to Year 12, are not given a date of leaving until it has been confirmed that they will be leaving the school at the end of the Summer term as this may cause issues with Attendance information.*

5. Select the **Reason for Leaving** from the drop-down list, such as **Normal leaving age - Employment**.
6. Enter the **Destination after Leaving** if required. Alternatively, you can apply the **Reason for Leaving** to one set of pupil/students (as described in the previous step), then select the **Destination after Leaving** for a different, or subset of pupil/students.
7. Enter the **Destination Expected Start Date** or select the required date from the Calendar.
8. For schools in England, if the pupil/student is a child deemed missing in education, select the **Grounds for Removal** from the drop-down list.

9. Secondary schools in England can select a **Learning Aim Withdrawal Reason** from the drop-down list. Secondary schools in Wales can select an **LA Withdrawal Reason** (Learning Activity). When recording a **Learning Aim Withdrawal Reason** for Post 16 students, this information is used by Course Manager.



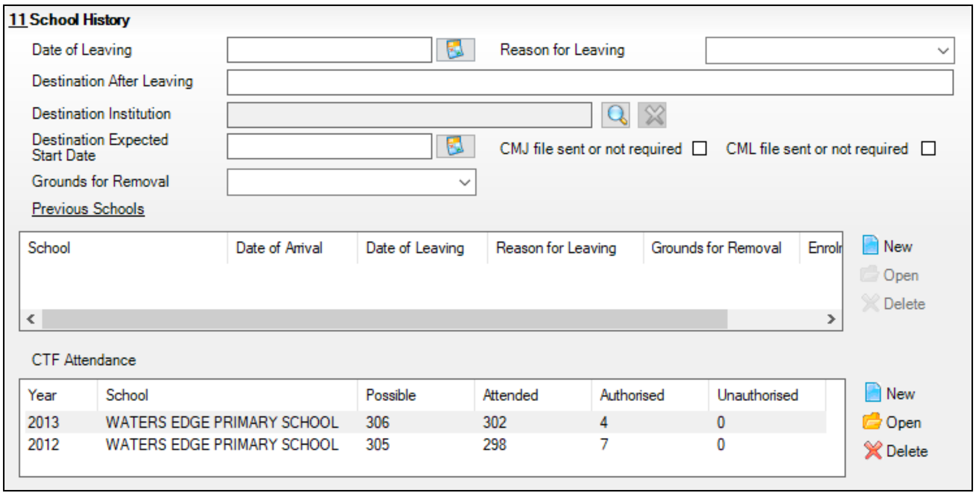
10. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys (as described in step 2) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
11. If an error has been made, highlight the particular pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
12. To remove a pupil/student from the list, highlight their name and then click the **Remove** button.
13. To clear the contents of the fields in the **Leaving Information** panel, highlight the required pupil/student(s) then click the **Clear** button. Re-enter the information as required.
14. Click the **Save** button to save the changes. The chosen pupil/student(s) are recorded with a date of leaving on the date specified.

Recording Individual Leavers Via the School History Panel

It is also possible to record individual leavers during the school year using the **School History** panel on the **Pupil (or Student) Details** page.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Pupil** (or **Student**) browser.
2. Enter details in the fields and select from the drop-down lists to narrow your search, then click the **Search** button. Leaving all fields blank and clicking the **Search** button displays all current pupil/students.
3. Select the required pupil/student.

4. Click the **School History** hyperlink to display the **School History** panel.



5. Enter the required **Date of Leaving** or click the **Calendar** button and select the required date.
6. Select the **Reason for Leaving** from the drop-down list, such as **End of phase transfer - Maintained school**.
7. Enter the **Destination after Leaving** and/or the **Destination Institution**, if required.
8. Enter the **Destination Expected Start Date** or click the **Calendar** button and select the required date.
9. For schools in England, if the pupil/student is a child deemed missing in education, select the **Grounds for Removal** from the drop-down list.
10. Click the **Save** button to save the changes.

13 | Recording Behaviour Incidents

Introduction

Behaviour Management is used to record, monitor and manage pupil/student behaviour in your school and consists of the following four areas:

- Behaviour
- Achievements
- Detentions
- Report cards.

The Behaviour area is used by schools to record incidences of misbehaviour, such as disruption, bullying, etc. and the outcome of such incidences. Information recorded in Behaviour Management can often be accessed via the **Links** panel on various pages in SIMS.

Each behaviour incident can be allocated a number of points. Points are recorded against the pupil/student across the current academic year and a cumulative points total is available. This enables schools to monitor and compare points for behaviour and achievements. A net points total, which is the result of subtracting the number of behaviour points from the number of achievement points, provides a useful overview of a pupil/student's conduct in school.

When recording behaviour incidents, some of the values available from drop-down lists can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values.

Recording Behaviour Incidents

There are four methods of recording behaviour incidents:

- Record a behaviour incident via the register (**Focus | Attendance** (or **Lesson Monitor**) **| Take Register**).
- Record a behaviour incident for an individual pupil/student via the **Links** panel – record the behaviour incident, and if required add a detention at the same time (please see *Adding/Editing an Individual Pupil/Student Behaviour Incident* on page *379*).
- Record a behaviour incident for multiple pupil/students - add all the pupil/students involved and, if required, add a detention for all those involved (please see *Recording Behaviour Incidents* on page *356*).
- Create a detention and add one or more pupil/students to it at the time of creation, then add a new behaviour incident (or link an existing one) from the detention (please see *Adding/Editing Detentions* on page *409*).

It is possible to record multiple behaviour types against a behaviour incident record. For example, a fight in the playground may have led to further incidents, such as damage to property and theft. These additional incidents can also be added to the record as additional behaviour types.

This section describes how to record an incident and how to add the pupil/students involved, then record any additional behaviour types. It is possible to record a behaviour incident for a specific pupil/student, such as disruptive behaviour in class (please see *Adding/Editing an Individual Pupil/Student Behaviour Incident* on page *379*).

When recording behaviour incidents, specifying the location is particularly useful because it enables you to produce reports based on the incident location. This enables *hot spot* areas for poor behaviour to be identified. Appropriate preventative measures can then be taken, such as the provision of additional staffing. It is also possible to link one or more documents to the behaviour record to provide any required supplementary information.

Recording behaviour incidents provides historical evidence of poor behaviour for the Board of Governors or Local Authority when considering an exclusion, for example.

It is possible to report on behaviour incidents using a wide range of pre-defined behaviour reports (please see *Reporting on Behaviour Incidents* on page *387*).

When a new behaviour incident occurs the details should be recorded immediately, while the details of the incident are clear in your mind.

Additional Resources:

Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Setting up Behaviour Types and Behaviour Role Types

When recording behaviour incidents, some of the values available from drop-down lists can be edited to meet the specific needs of your school.

You can amend the types of behaviour that can be recorded and assign a points value to each type. You can also re-arrange the order in which behaviour types are displayed in lists so that the behaviour types recorded most frequently can be accessed more easily. Additionally, behaviour types can be made available via the register, enabling you to record a behaviour incident while taking the register.

If a behaviour type associated with bullying is selected, you can also record the type of bullying that took place. To record this additional information, behaviour types must be associated with bullying. Behaviour types and bullying types are managed using the **Maintain Behaviour Types** page (via **Tools | Setups | Behaviour Management | Behaviour Type**) and the **Lookup Type Details** page (via **Tools | Lookups | Maintain**).

When recording details of a behaviour incident, it is also possible to record a person's role in the incident, e.g. witness, aggressor, etc. To record this information, behaviour role types must be set up. Behaviour role types are managed using the **Maintain Behaviour Role Types** page (via **Tools | Setups | Behaviour Management | Behaviour Role Type**).

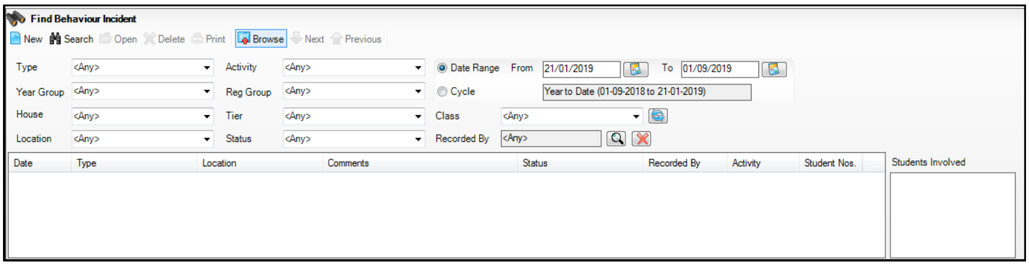
Additional Resources:

Setting Up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook
Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Searching for Existing Behaviour Incidents

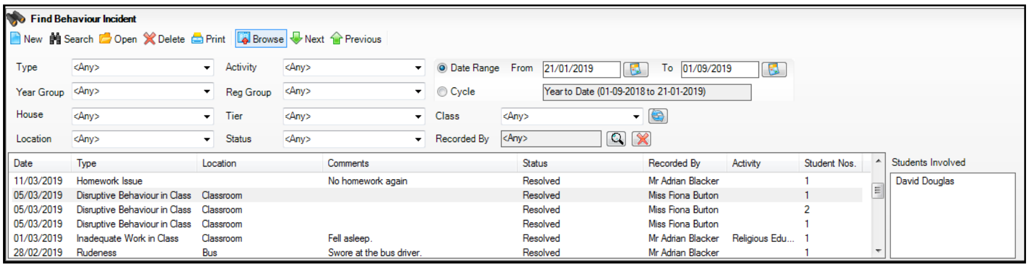
Before recording the details of a behaviour incident, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific incidents, e.g. you can view a list of all the incidences of bullying in the current academic year. Alternatively, you can view a behaviour incident from the pupil/student record of one of the pupil/students involved (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).

1. Select **Focus | Behaviour Management | Maintain Behaviour Incidents** to display the **Find Behaviour Incident** browser.



2. Select an item from one or more of the following drop-down lists to filter the list of behaviour incidents: **Type** (e.g. **Bullying**), **Activity** (e.g. **Science**), **Year Group**, **Class**, **House**, **Tier**, **Location** and **Status**. Users in Secondary schools can also search by **Reg Group**.
3. Define the date range of the search by:
   - selecting the **Date Range** radio button then entering the required date range in the **From** and **To** fields, or selecting from the Calendar. The default date range is from today to the last day of the current academic year.

     or
   - selecting the **Cycle** radio button then selecting the required date range from the drop-down list, e.g. **Year to Date**. The default date range is from the first day of the current academy year to today.
4. To search for behaviour incidents **Recorded By** a specific person, click the **Browser** button then search for and select the required person using the **Select person** dialog. This filter can be removed by clicking the **Delete Filter** button.
5. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all behaviour incidents on the date (or date range) specified.

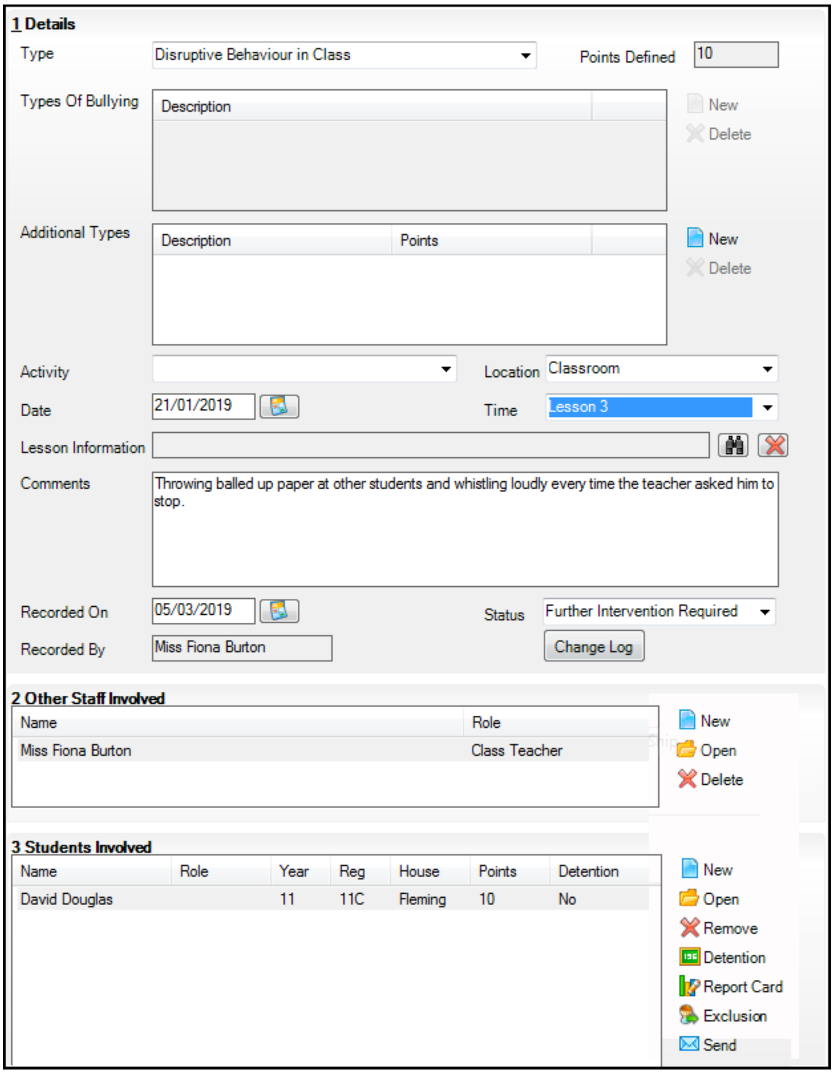
   

   A summary of each behaviour incident is displayed in the results area, including the **Date** and **Time** of the incident, the **Location**, its **Status** and the number of pupil/students involved (**Student Nos**).
6. Highlight the incident you wish to view or edit. The names of the **Students Involved** are displayed on the right-hand side of the highlighted incident.
7. Click the **Open** button to display the **Behaviour Incident** page. If you cannot find the required record, click the **New** button to display the **Behaviour Incident Details** page.

*NOTE: It is also possible to view a behaviour incident from a pupil/student's record (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all behaviour incidents linked to this pupil/student by navigating to the **Behaviour** panel.*

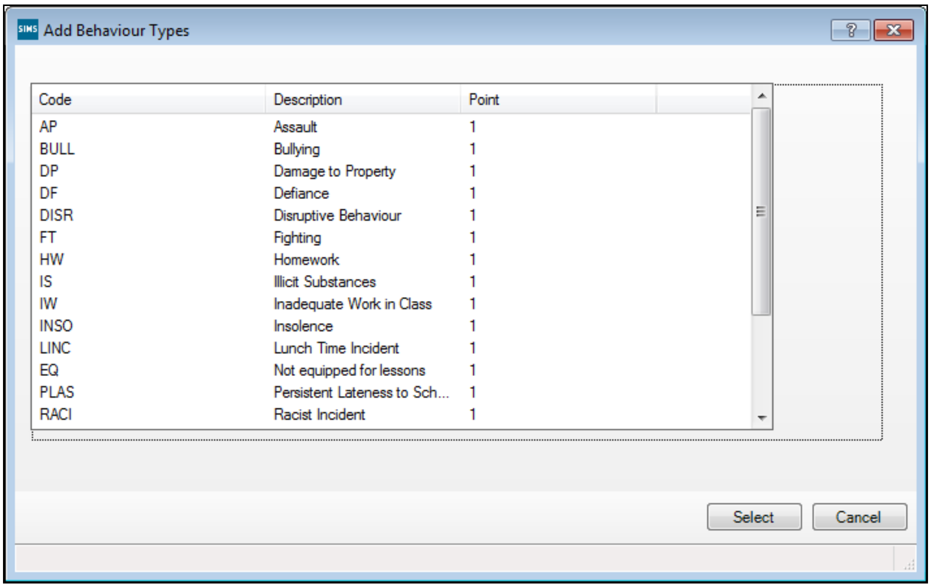
Adding/Editing a Behaviour Incident

1. Select **Focus | Behaviour Management | Maintain Behaviour Incidents** to display the **Find Behaviour Incident** browser.
2. Search for an existing behaviour incident (please see *Searching for Existing Behaviour Incidents* on page *357*) then click the **Open** button to edit its details on the **Behaviour Incident** page or click the **New** button to display the **Behaviour Incident Details** page.



3. Select the required incident **Type** from the drop-down list, e.g. **Disruptive Behaviour in Class**. The **Points Defined** field displays the default value assigned to the behaviour type and cannot be edited.

4. If a behaviour type is selected from the **Type** drop-down list that is associated with bullying, the **Type Of Bullying** field can be completed by selecting from the drop-down list. This enables you to record additional information regarding a bullying incident (e.g. a behaviour **Type** of **Racist Incident** may have a bullying type of **Teasing** or **Name Calling**). Multiple bullying types can be selected by holding down the **Ctrl** key and clicking each type. Additional types of bullying can be added using Maintain Lookups (via **Tools | Lookups | Maintain**). This functionality enables you to amend the values to those that commonly occur in your school. For more information, please refer to the *Importing and Maintaining Lookups* section of the *Setting Up and Administering SIMS* handbook.



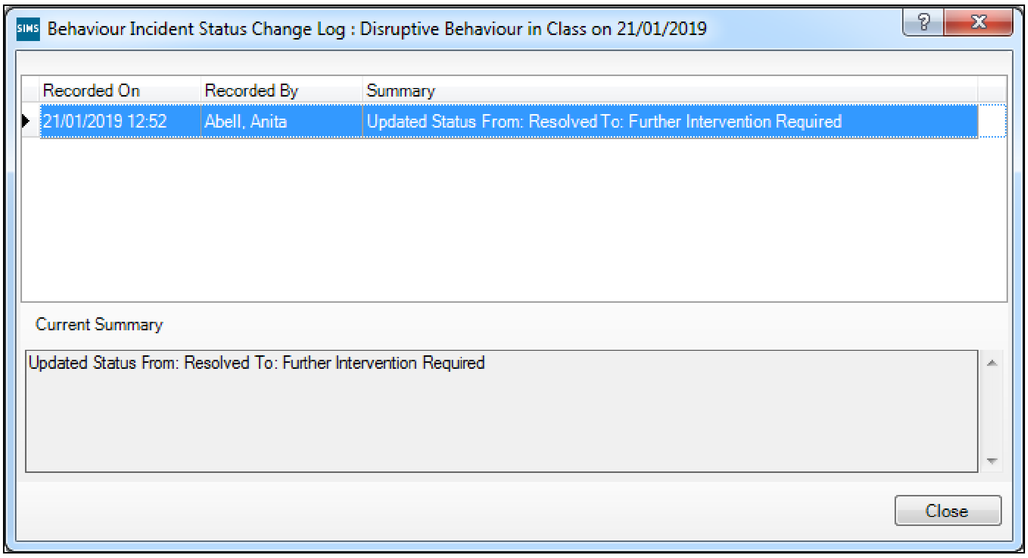
5. Highlight the required behaviour type. Multiple behaviour types can be selected by holding the **Ctrl** key and clicking each type. Click the **Select** button to return to the **Behaviour Incident Details** page, where the details of any added behaviour types are displayed in the **Additional Types** table. Any unwanted additional types can be removed by highlighting them then clicking the **Delete** button adjacent to the table.
6. If applicable, select the **Activity**, e.g. **Physical Education**.
7. Select the **Location** from the drop-down list, e.g. **Playing Field**, where the incident occurred.
8. For a new behaviour incident record, the **Date** of the incident defaults to today. Amend the date if required, or click the **Calendar** button then select the required date.
9. Select the **Time** of the incident from the drop-down list, e.g. **End of School**.
10. Specify the **Lesson Information** associated with the behaviour incident by clicking the **Search** button and selecting the required lesson.
11. Enter any **Comments** about the incident. These comments can also include an explanation of the outcome, if required.

12. For a new behaviour incident record, the **Recorded On** field defaults to today's date. For an existing record, this field displays the date on which the incident was initially recorded. This can be amended by editing the date or by clicking the **Calendar** button then selecting the required date.

    The name of the person recording the behaviour incident is displayed in the **Recorded By** field.

13. Select the required **Status** of the incident from the drop-down list, e.g. **Unresolved**, **Resolved**, etc. depending on whether the incident is considered closed or whether there are outstanding actions to be taken.

    To view changes that have been made to the status of a behaviour incident, click the **Change Log** button.



    The **Behaviour Incident Status Change Log** dialog displays the date and time that a change was made (**Recorded On**), the name of the user who made the change (**Recorded By**) and a **Summary** of the change.

    The **Current Summary** displays the actual status of the incident after the change was made.

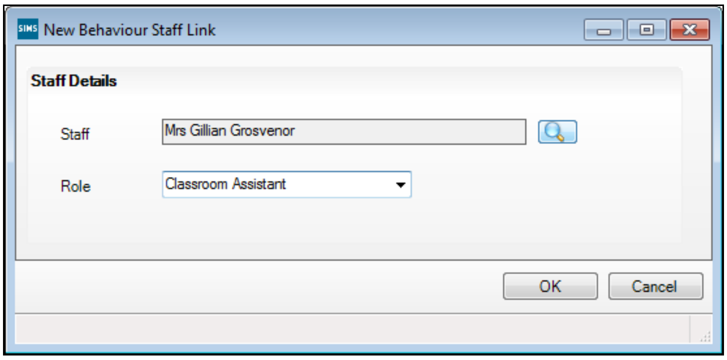
14. Click the **Close** button.

More Information:
Setting up Behaviour Types and Behaviour Role Types on page *357*

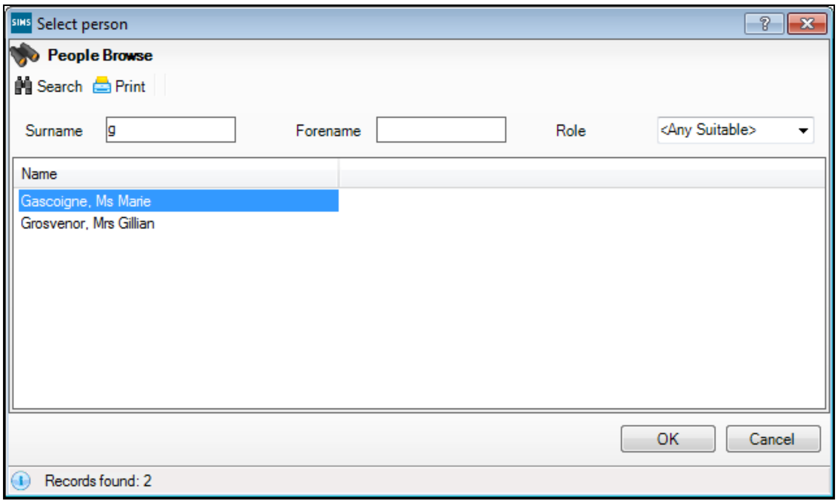
Adding/Editing the Staff Involved

Once the record is saved for the first time, the **Other Staff Involved** panel displays the name of the user who is recording the incident.

1. To specify additional or alternative members of staff involved in the incident, either highlight the required member of staff in the **Other Staff Involved** panel then click the **Open** button to display the **Edit Behaviour Staff** dialog or click the **New** button to display the **New Behaviour Staff Link** dialog.



2. Click the **Browser** button adjacent to the **Staff** field to display the **Select person** dialog.

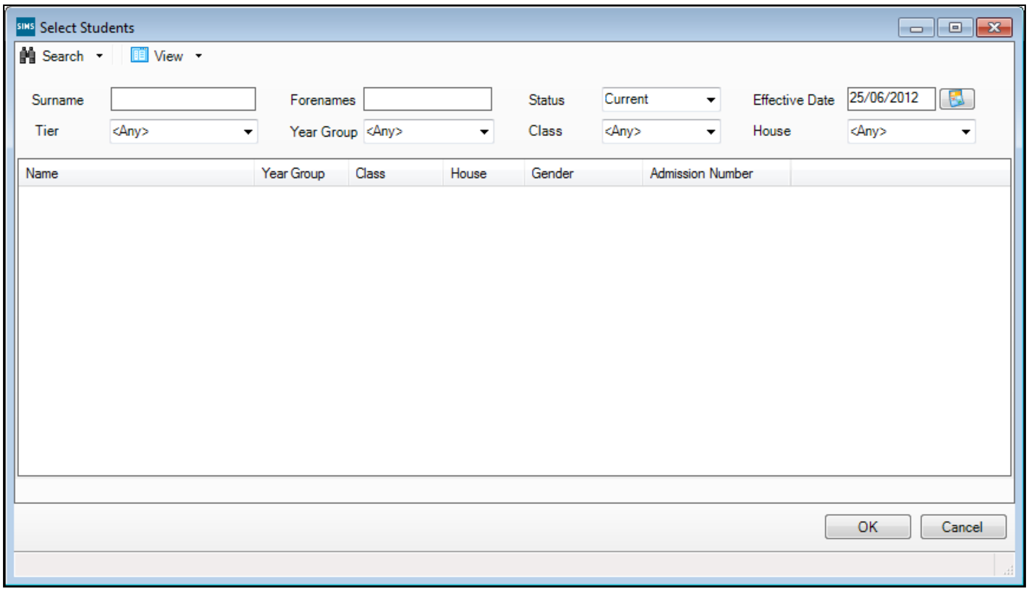


3. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
4. Highlight the required member of staff then click the **OK** button to return to the **New Behaviour Staff Link** dialog.
5. Select the required **Role** from the drop-down list, e.g. **Class Teacher** then click the **OK** button to return to the **Behaviour Incident** page. The selected member of staff is displayed in the **Other Staff Involved** panel.

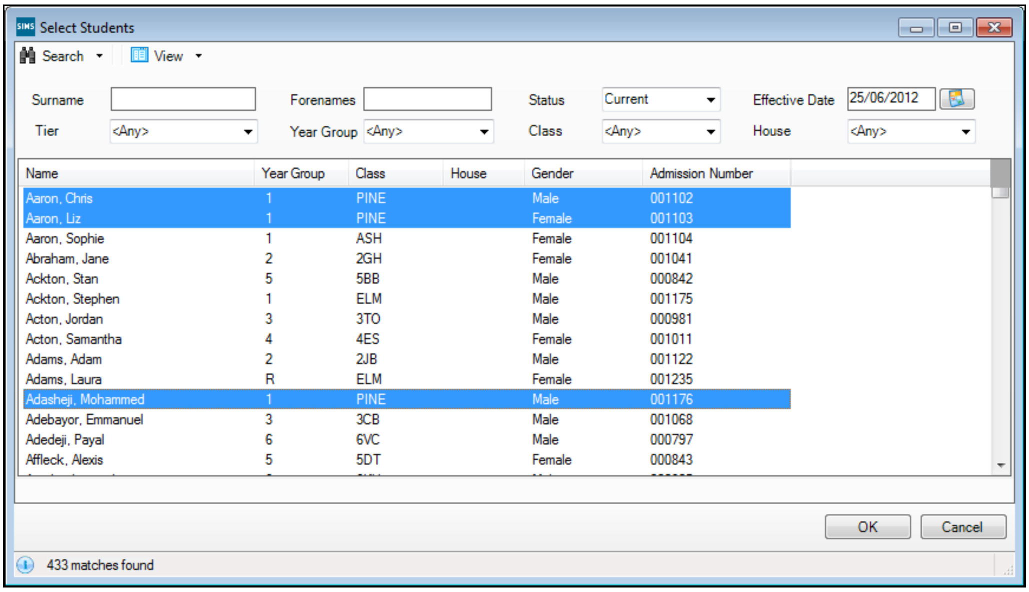
6. Repeat this process for any other members of staff involved in the behaviour incident.
7. To remove a member of staff, highlight them then click the **Delete** button.

Recording the Pupil/Students Involved

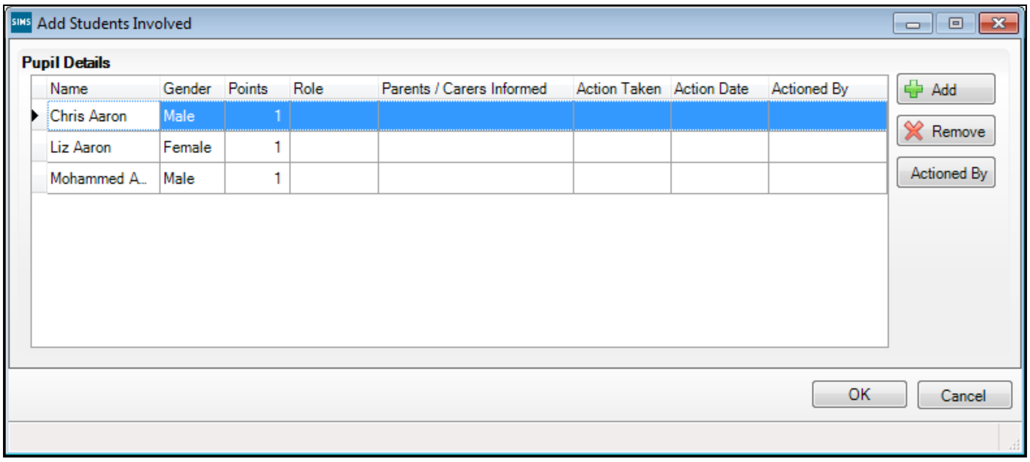
1. To specify the pupil/students involved in the incident, click the **New** button in the **Students Involved** panel to display the **Select Students** dialog.



2. Enter any required search criteria or leave the fields blank to display all pupil/students then click the **Search** button.
3. Highlight the required pupil/student. Multiple pupil/students can be selected by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key then clicking to select a block of pupil/students.



4. Click the **OK** button to display the **Add Students Involved** dialog, where the selected pupil/students are displayed.



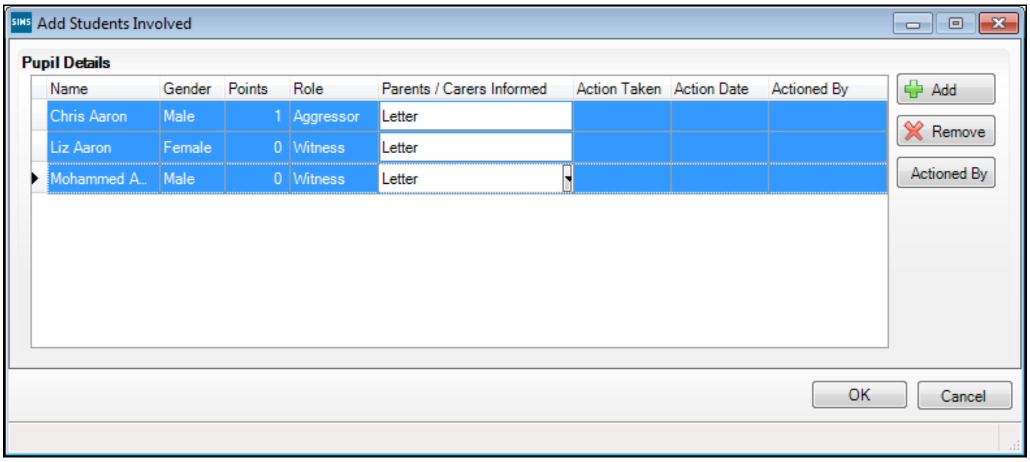
5. Additional pupil/students can be added by clicking the **Add** button to display the **Select Students** dialog then repeating steps 2 to 4. Pupil/students added in error can be removed by highlighting them then clicking the **Remove** button.
6. For each pupil/student involved:
   - The **Points** field displays the default number of points awarded for the selected behaviour type(s). The default points value is allocated to every pupil/student selected. Additional or fewer points can be applied to individual pupil/students by clicking in the cell then overtyping the value.
   - Select the pupil/student's **Role** in the incident from the drop-down list, e.g. **Aggressor**, **Target**, **Witness**, etc.

     IMPORTANT NOTES: *If you select a* ***Role*** *of* ***Target*** *or* ***Witness****, the* ***Points*** *field is set automatically to* ***0*** *to ensure that this incident does not have an adverse effect on their behaviour record.*

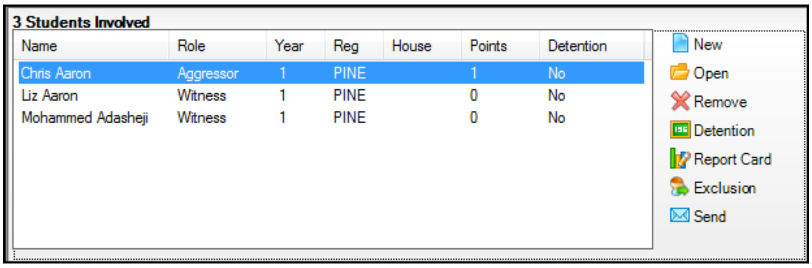
     If you select a ***Role*** *of* ***Bystander****, you may wish to edit the behaviour* ***Points*** *to* ***0*** *manually for the same reason.*

   - Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents/Carers Informed** drop-down list.
   - If applicable, select the **Action Taken** from the drop-down list, e.g. **Detention**, **Discussed with Parents**, etc.
   - Enter the **Action Date** in the cell or click in the cell then select the required date from the drop-down list.
   - To select the member of staff who has actioned the sanction and to populate the **Actioned By** field, click the **Actioned By** button to display the **Select person** dialog, search for and highlight the required person then click the **OK** button to return to the **Add Students Involved** dialog.

*TIP: It is possible to select multiple pupil/students in the **Add Students Involved** dialog by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Action Taken** from the drop-down list and all highlighted pupil/students are assigned the selected **Action Taken**. This also applies to the **Points**, **Role** and **Parent/Carers Informed** drop-down lists.*

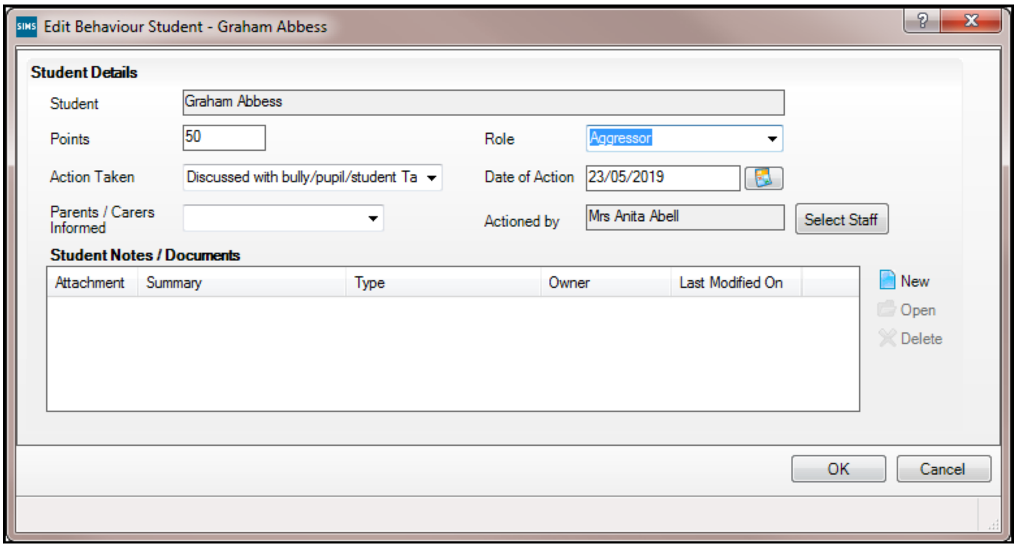


7. When all the necessary details have been entered, click the **OK** button to return to the **Behaviour Incident** page. The details of all pupil/students involved are displayed in the **Students Involved** panel.



8. If you have added a pupil/student to the **Students Involved** panel in error, highlight them and click the **Delete** button to remove them.

9. Highlight one or more names then click the **Open** button to display the **Edit Students Involved** dialog. To edit the individual behaviour details of a pupil/student added in step 5, highlight their name then click the **Open** button to display the **Edit Behaviour Student** dialog (for a single pupil/student) or the **Edit Students Involved** dialog (for multiple pupil/students).



The **Student** name field is already populated.

The **Points** field defaults to the value assigned to the **Type** of behaviour incident selected but this can be amended, if required.

10. Select the student's **Role** in the behaviour incident from the drop-down list.
11. Select the **Action Taken** from the drop-down list.

    The **Date of Action** defaults to today's date but this can be changed by selecting an alternative date from the **Calendar**, if required.
12. Select the means of communication used to notify the student's guardians by selecting the appropriate option from the **Parents/Carers Informed** drop-down list.

    The **Actioned By** field is populated from the original details recorded for the behaviour incident.
13. To add any additional **Student Notes/Documents** to the pupil/student involved in the behaviour incident, click the **New** button to display the **Add Note/Document** dialog.
14. Click the **OK** button.
15. Click the **Save** button to save your changes.

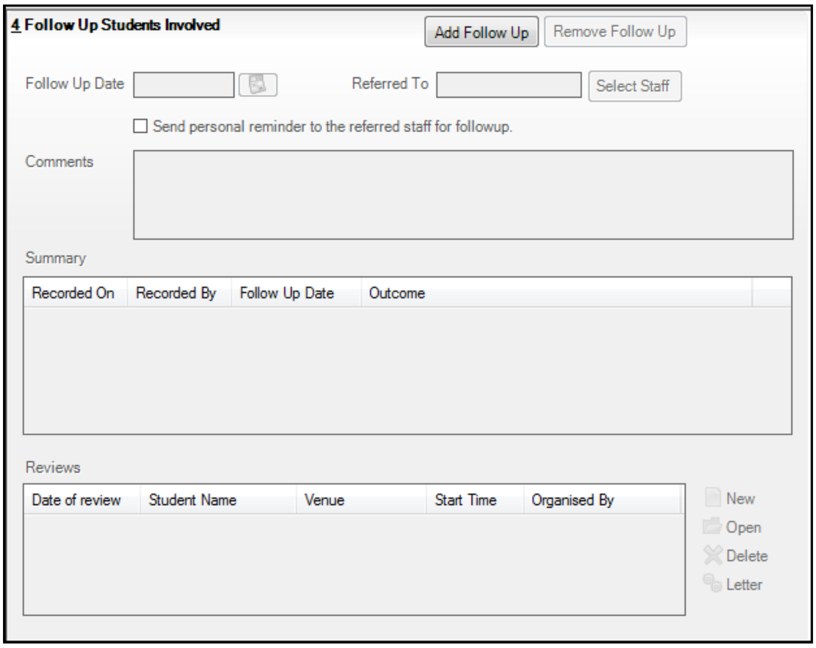
The **Links** panel on the right-hand side of the **Behaviour Incident** page is used to access various areas of SIMS relating to the pupil/student highlighted in the **Students Involved** panel. For example, highlighting Chris Aaron then clicking the **Pupil Details** link displays Chris' full details on the **Pupil** (or **Student**) **Details** page, whereas any exclusions recorded against him can be displayed by clicking the **Exclusions** link, etc (please see *Using the Pupil/Student Links Panel* on page *145*).

More Information:
Attaching a New Note/Document on page *147*
Using the Pupil/Student Links Panel on page *145*

Recording Follow Up Details for Students Involved

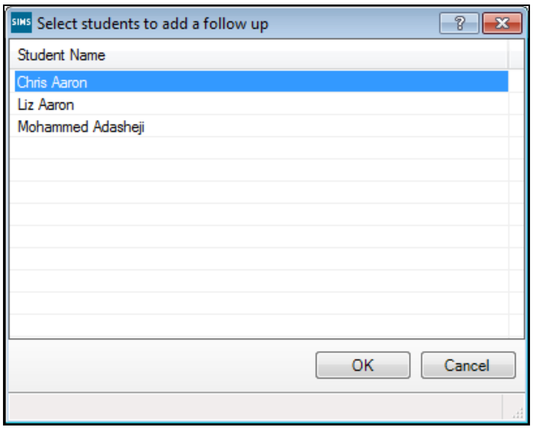
When a pupil/student has been recorded as being involved in a behaviour incident, it is also possible to record details of any follow-up activities taken, or meetings held, in response to their involvement.

1. Click the **Follow Up Students Involved** hyperlink to display the **Follow Up Students Involved** panel.



2. Click the **Add Follow Up** button to display the **Select students to add a follow up** dialog.

*NOTE: A follow up record can be deleted by clicking the **Remove Follow Up** button to display the **Select students to remove a follow up** dialog, highlighting the required pupil/student(s) then clicking the **OK** button.*

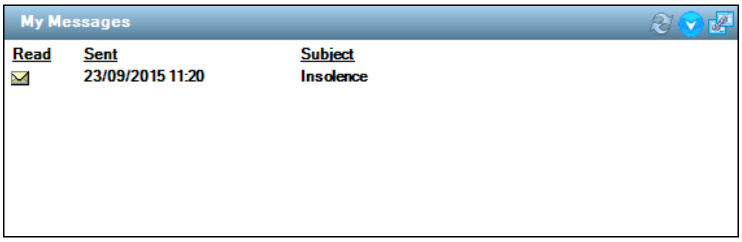


3. Highlight the required pupil/student then click the **OK** button to return to the **Behaviour Incident** page.

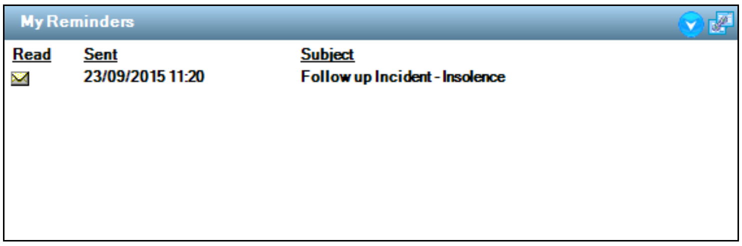
   Multiple pupil/students can be highlighted by clicking the first name, holding down the **Ctrl** key then clicking any other required names.

   The name(s) of the selected pupil/student(s) are highlighted in blue in the **Students Involved** panel to indicate that a follow up record has been created for them.
4. The **Follow Up Date** is the date by which the behaviour incident should be reviewed. This defaults to today's date (if the record is saved before adding a follow up record) but it can be amended by entering the required date or by clicking the **Calendar** button then selecting the required date.
5. If you wish to refer the behaviour incident to a member of staff, this can be recorded using the **Referred To** field. Click the **Select Staff** button to display the **Select person** dialog, search for and highlight the required member of staff then click the **OK** button to return to the **Behaviour Incident** page.

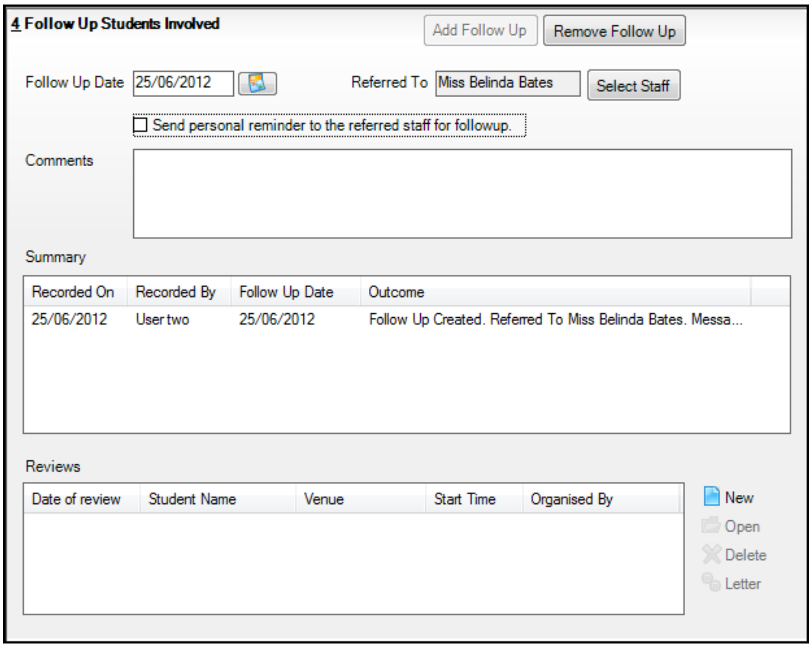
   A message is sent automatically to the selected member of staff when the behaviour incident record is saved, informing them that the incident has been referred to them. The message is accessible to the selected member of staff via the **My Messages** panel on the SIMS **Home Page**.



6. Select the **Send personal reminder to the referred staff for followup** check box to indicate that you wish to send a reminder to the selected member of staff, informing them that a follow up action is required. This reminder is sent to the member of staff named in the **Referred To** field when the record is saved. This message is accessible via the **My Reminders** panel on the SIMS **Home Page**.



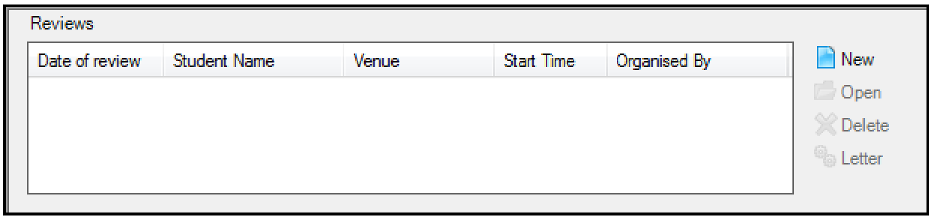
7. Enter any **Comments** regarding the involvement of the selected pupil/student(s) in the behaviour incident.
8. Click the **Save** button to save the record.



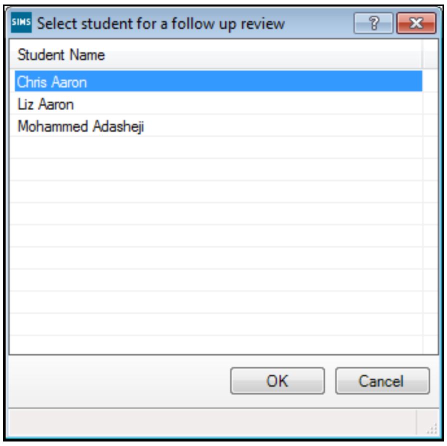
Once the behaviour incident has been saved, the **Summary** panel is populated with the details entered, a message is sent automatically to the member of staff indicated in the **Referred To** field and a reminder of any follow up action is also sent to the appropriate member of staff.

Creating a Review Meeting

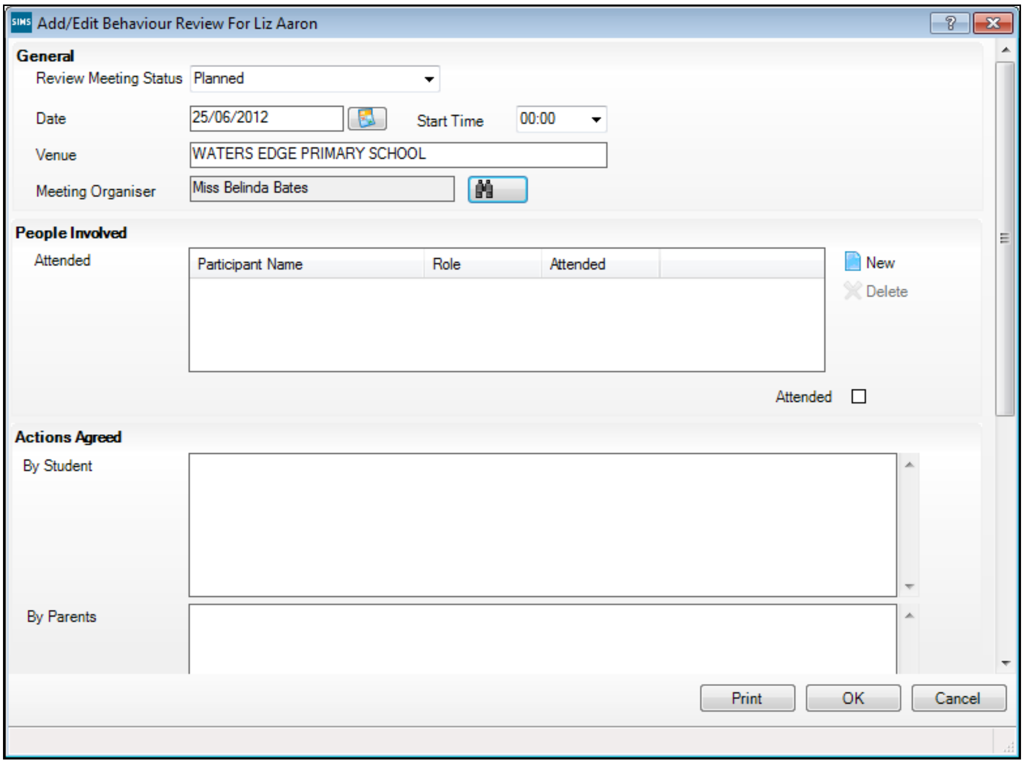
A review meeting can be set up to discuss an incident further, if required.



1. Click the **New** button adjacent to the **Reviews** table in the **Follow Up Students Involved** panel to display the **Select student for a follow up review** dialog.



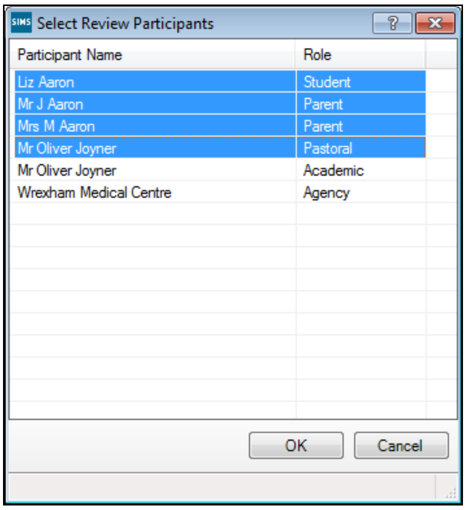
2. Highlight the required pupil/student then click the **OK** button to display the **Add/Edit Behaviour Review** dialog.



The **Review Meeting Status** defaults to **Planned**. Once the meeting has taken place, this can be changed to **Meeting Completed**.

3. Enter the **Date** on which the meeting is scheduled to take place or click the **Calendar** button then select the required date.
4. Select the **Start Time** of the meeting from the drop-down list.
5. Enter the **Venue** of the meeting.
6. The **Meeting Organiser** defaults to the currently logged in user but can be amended by clicking the **Search** button to display the **Select person** dialog, searching for and highlighting the required member of staff then clicking the **OK** button to return to the **Add/Edit Behaviour Review** dialog.

7. To select the required attendees of the meeting, click the **New** button in the **People Involved** panel to display the **Select Review Participants** dialog, which displays the selected pupil/student's name, parent/guardians, other staff involved with the pupil/student, etc.



8. Highlight the required meeting participants then click the **OK** button to return to the **Add/Edit Behaviour Review** dialog, where the required attendees are displayed in the **Attended** panel.

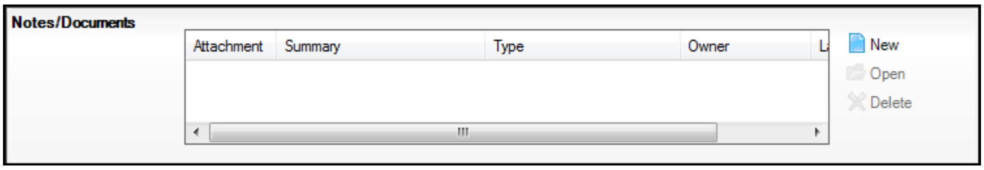
   Multiple people can be highlighted by clicking the first name, holding the **Ctrl** key then clicking any other required names. A block of people can be selected by clicking the first person in the block, holding the **Shift** key then clicking the last name in the block.

   The **Attended** column displays **False** until the meeting has taken place and the meeting record is updated manually.

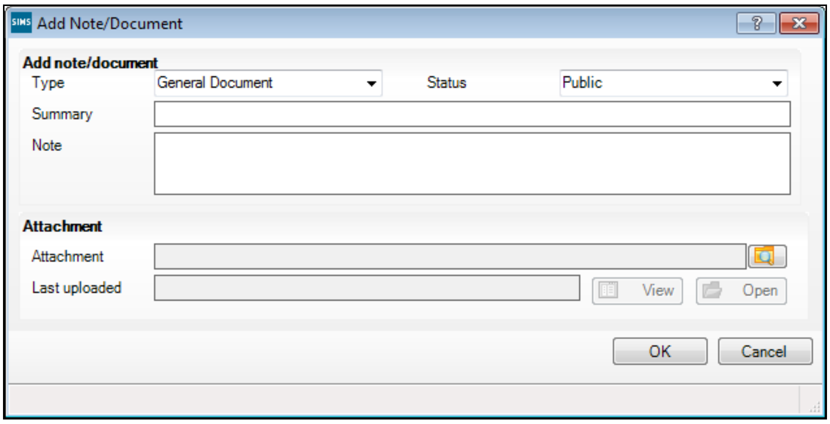
9. To mark an attendee as having attended the meeting, highlight their name then select the **Attended** check box at the bottom of the **People Involved** panel. Multiple people can be marked as having attended the meeting by clicking the first name, holding the **Ctrl** key then clicking any other required names. Everybody can be marked as having attended the meeting by clicking the first name in the list, holding the **Shift** key then clicking the last name in the list.

10. In the **Actions Agreed** panel, enter details of any actions that must be carried out **By Student**, **By Parents** and **By SLT** (a member of the Senior Leadership Team).

    The **Notes/Documents** panel enables you to record additional information relating to the meeting, if required.



11. Click the **New** button in the **Notes/Documents** panel to display the **Add Note/Document** dialog.



12. The note/document **Type** defaults to **General Document** but can be changed by selecting from the drop-down list, if required.
13. Select the **Status** of the note/document from the drop-down list.
    - **Public** – the note/document is available to all users with sufficient permissions.
    - **Private** – the document is available only to you.
    - **Confidential** – the document is available only to SIMS users with School Administrator or Senior Management Team permissions.
14. Enter a concise **Summary** of the note/document, together with any further detail in the **Note** field. This additional information can be useful as an overview and is also beneficial if a document ever becomes detached from the pupil/student record. If you do not want to add an attachment, click the **OK** button. If you do want to add an attachment, click the **Open** button adjacent to the **Attachment** to display the **Add attachment** dialog.
15. Navigate to the required location, highlight the required document then click the **Open** button to return to the **Add Note/Document** dialog.
16. The **Last uploaded** field remains empty until you have saved the record so click the **OK** button to return to the **Add/Edit Behaviour Review** dialog then click the Open button to re-open the note or document record.

    Once saved, you can view the date and time of the last file upload, together with the name of the user who uploaded it.
17. It is possible to **View** or **Open** the attached document by clicking the respective buttons adjacent to the **Last uploaded** field.

    The **View** button enables users with insufficient permissions to read the contents of the attachment. These users cannot amend or edit attachments because they are opened in read-only mode.

    The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When an attachment has been opened and amended and the **Save** button is clicked on the main page, the **Upload modified documents** dialog is displayed. Select the **Status** check box and click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.

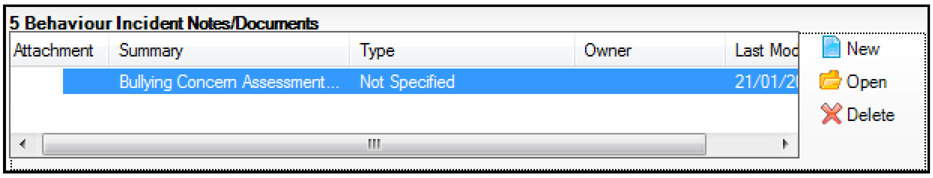
When you re-open the **Edit Note/Document** dialog after adding a note or attachment, the **Document Log** at the bottom of the **Edit note/document** panel records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. This log can be printed for future reference by clicking the **Print** button.

18. Click the **OK** button to save your changes and return to the **Behaviour Incident** page. Alternatively, click the **Print** button to produce a summary of the review details, which can be printed or saved.

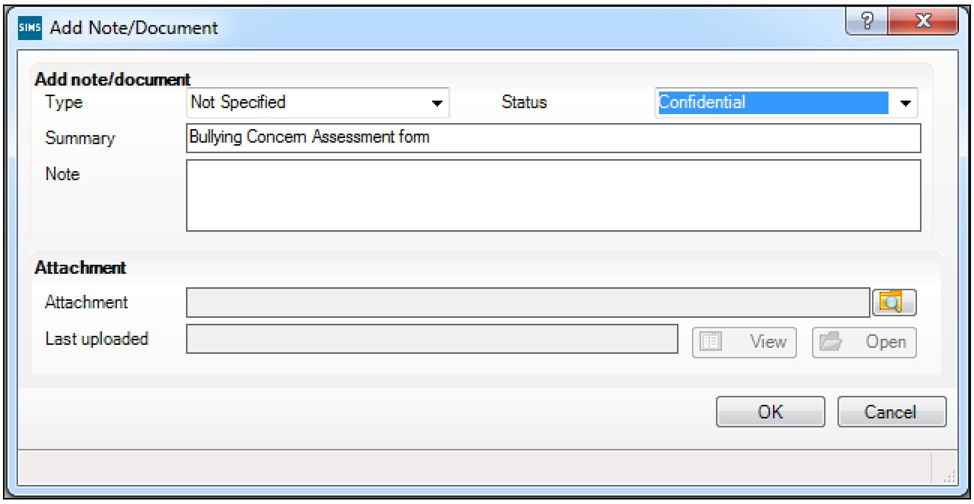
Recording Behaviour Incident Notes/Documents

It is possible to link notes and documents (including Bullying Concern Assessment forms) to a behaviour incident via the **Behaviour Incident Notes/Documents** panel.

1. Click the **Behaviour Incident Notes/Documents** hyperlink to display the **Behaviour Incident Notes/Documents** panel.



2. Click the **New** button and select the appropriate type of document to display the **Add Note/Document** dialog.



3. Select the **Status** of the document from the drop-down list.
   - **Public** – the document will be available to all users with sufficient add/view/edit document permissions.
   - **Private** – the document will be available only to you.
   - **Confidential** – the document will be available only to SIMS users with School Administrator or Senior Management Team permissions.

4. If it is not already populated, enter a clear and concise **Summary** together with any further detail in the **Notes** field. This information can be useful for any reader of the attached and also if the document ever becomes detached from the pupil/student record. If you do not want to add an attachment, click the **OK** button at this point.
5. To add an **Attachment**, click the **Browse** button adjacent to the **Attachment** field and navigate to the location of a previously stored file.
6. Highlight the required document and click the **Open** button to attach it to the record.
7. Click the **OK** button to save the attachment.

   The **Last Uploaded** field remains empty until you have saved the record, then you are able to view the date and time of the last file upload, together with the name of the user who uploaded it.

   It is possible to **View** or **Open** the attached document by clicking the respective buttons adjacent to the **Last Uploaded** field. The **View** button enables users with insufficient permissions to read the contents of the attachment. These users are not able to amend or edit attachments and the attachments are opened as read-only.

   The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When an attachment has been opened and amended and the **Save** button is clicked on the main page, an **Upload modified documents** dialog is displayed. Select the **Status** check box and click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.

   A **Document Log** at the bottom of the **Edit Note/Document** panel records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. This log can be printed for future reference by clicking the **Print** button.
8. Click the **Save** button on the **Behaviour Incident** page.

Assigning Pupil/Students to a Detention

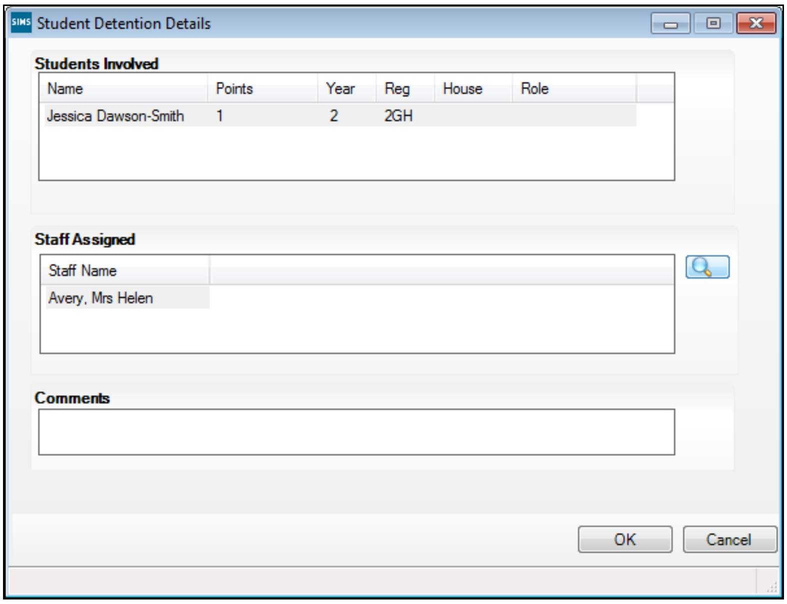
Pupil/students involved in a behaviour incident can be assigned to a detention using the **Behaviour Incident** page. Recording a detention from this page enables you to record detention details for a single pupil/student. It is also possible to record detention details for all pupil/students involved in a behaviour incident en masse (please see *Adding/Editing Detentions* on page *409*).

1. From the **Students Involved** panel, highlight a pupil/student in the list. If a pupil/student has already been assigned to a detention in relation to the selected behaviour incident, the **Detention** column displays **Yes**.

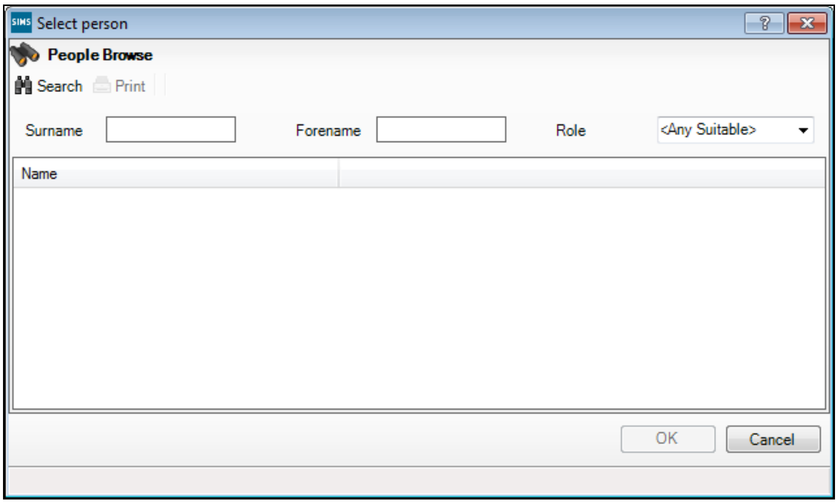
> *NOTE: If a pupil/student is already assigned to a detention session, it is not possible to assign them to another detention session relating to the same behaviour incident.*

2. Click the **Detention** button.
   - If the selected pupil/student is already assigned to a detention, you are asked whether you wish to open the record (please see *Viewing a Pupil/Student's Detention Record* on page *377*) or remove the link to the detention (please see *Removing an Assigned Pupil/Student from a Detention* on page *378*).
   - If the pupil/student is not already assigned to a detention, the **Student Detention Details** dialog is displayed for the selected pupil/student.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*



3. For a new detention, the **Staff Assigned** panel is blank. To change the member of **Staff Assigned** to the detention, click the **Browse** button to display the **Select person** dialog.



4. Enter any required search criteria, or leave the search fields blank to display all staff then click the **Search** button.
5. Highlight the required member of staff then click the **OK** button to return to the **Student Detention Details** dialog.
6. Enter any **Comments**. These comments are for any member of staff viewing the record in future.
7. Click the **OK** button to display the **Add Detention Details** dialog. Record the details of the detention (please see *Adding/Editing Detentions* on page *409*).

Additional Resources:

When viewing the topic referenced in step 7, please proceed directly to step 2 of the topic and ignore the process described in Assigning Pupil/Students to the Detention (because it is not possible to assign pupil/students to the detention directly).

> *NOTE: It is not possible to remove a group of assigned pupil/students from a detention when accessing the **Add Detention Details** dialog from the **Behaviour Incident** page, although this is possible from a different screen (please see* Adding/Editing Detentions *on page* 409*). It is possible to remove an individual pupil/student from a detention using the **Behaviour Incident** page (please see* Removing an Assigned Pupil/Student from a Detention *on page* 378*).*

Viewing a Pupil/Student's Detention Record

Pupil/students involved in a behaviour incident can be assigned to a detention using the **Behaviour Incident** page. Once a detention has been recorded, its details can also be viewed from this page.

1. From the **Students Involved** panel, highlight the pupil/student whose detention record you wish to view. If a pupil/student has already been assigned to a detention in relation to the selected behaviour incident, the **Detention** column displays **Yes**.
2. Click the **Detention** button then select **Open** from the drop-down list to display the **Detention Details** dialog.

> *NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

3. Record the details of the detention (please see *Adding/Editing Detentions* on page *409*).

Additional Resources:

When viewing the topic referenced in step 7, please proceed directly to step 2 of the topic and ignore the process described in Assigning Pupil/Students to the Detention (because it is not possible to assign pupil/students to the detention directly).

Removing an Assigned Pupil/Student from a Detention

If pupil/students have been assigned to a detention in error, it is possible to remove them from the detention (one at a time) using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight the required pupil/student. If a pupil/student is assigned to a detention in relation to the selected behaviour incident, the **Detention** column displays **Yes**.
2. Click the **Detention** button then select **Remove** from the drop-down list.
3. Click the **Yes** button to confirm that you wish to remove the highlighted pupil/student from the detention.
4. Click the **Save** button to save the record and update the **Detention** column for the selected pupil/student in the **Students Involved** panel to read **No**.
5. Repeat this process to remove any other pupil/students from the detention, if required.

Generating a Report Card

A member of the senior leadership team can generate a report card for a pupil/student involved in an incident using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight a pupil/student then click the **Report Card** button to display the **Report Card Details** dialog.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

2. Complete the details on the **Report Card Details** dialog.

Setting up an Exclusion

A member of the senior leadership team can set up an exclusion for a pupil/student involved in a behaviour incident using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight a pupil/student then click the **Exclusion** button to display the **Add Exclusion** dialog.

*NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

2. Complete the details on the **Add Exclusion** dialog (please see *Recording an Exclusion* on page *441*).

Sending Messages

It is possible to send a message to selected members of staff regarding one or more of the pupil/students involved in the behaviour incident using the **Behaviour Incident** page.

1. From the **Students Involved** panel, highlight a pupil/student. To select multiple pupil/students, hold the **Ctrl** key then click each required pupil/student. To select sequentially listed pupil/students, hold the **Shift** key, click the first pupil/student then click the last pupil/student in the block.

2. Click the **Send** button in the **Students Involved** panel to display the **Send Message** dialog, with the selected pupil/student(s) displayed in the **Message** field (please see *Sending General Messages* on page *45*).

> *NOTE: If you have not yet saved the behaviour record, you will be asked if you wish to save and continue. Click the **Yes** button to proceed.*

3. Complete the details on the **Send Message** dialog (please see *Recording an Exclusion* on page *441*).

Saving the Behaviour Incident

Once all the required information has been entered, click the **Save** button to save the record.

Adding/Editing an Individual Pupil/Student Behaviour Incident

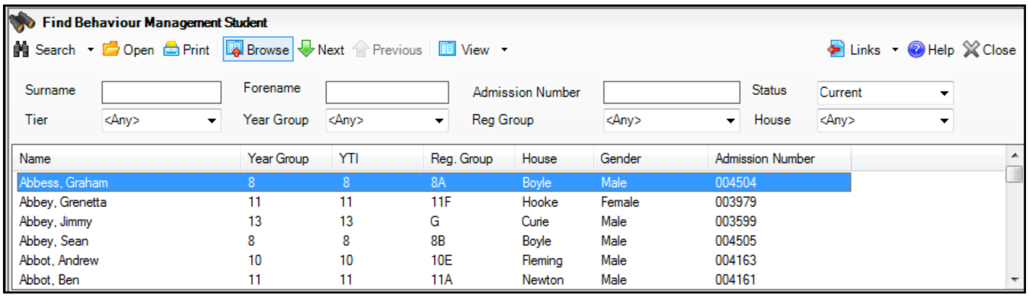
This section describes how to record or edit a behaviour incident for an individual pupil/student. One or more documents can be linked to the behaviour record so that the required supplementary information can also be recorded.

It is also possible to record a behaviour incident then identify the pupil/students involved (please see *Recording Behaviour Incidents* on page *356*).

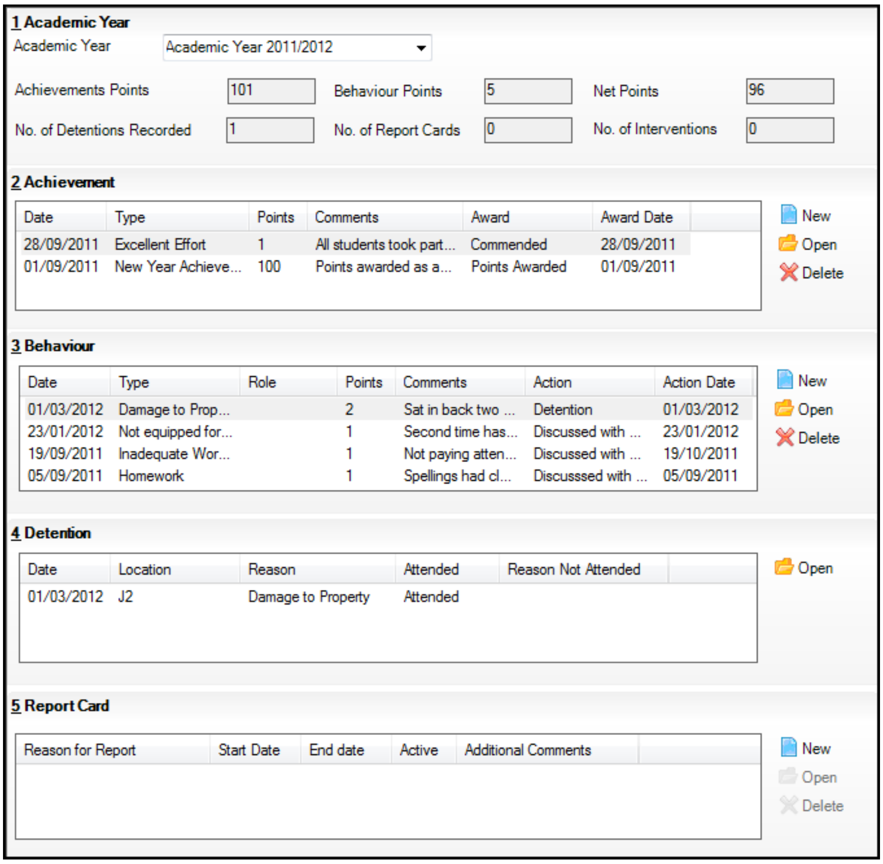
Once a behaviour incident has occurred, it can be recorded in SIMS. Some schools may ask the member of staff involved to complete a proforma, which is then handed to the central office for data entry into SIMS.

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.

> *NOTE: It is also possible to add behaviour incidents via the **Links** panel on the **Pupil** (or **Student**) **Details** page (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**). Click the **Behaviour Management** hyperlink in the **Links** panel to display the **Behaviour Management** page.*

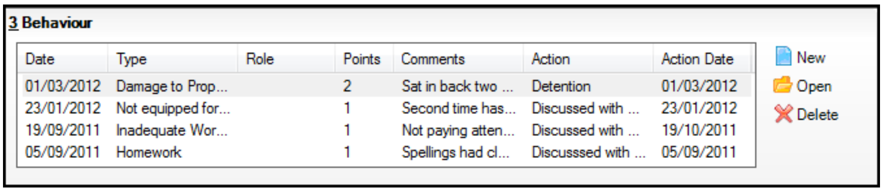


2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.



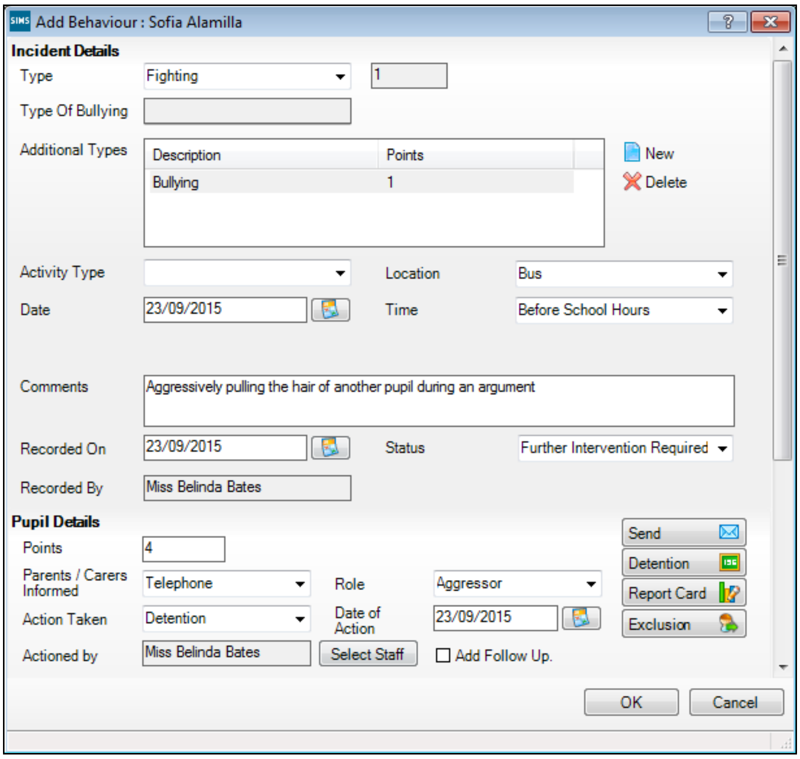
The **Academic Year** panel displays a summary of the selected pupil/student's behaviour and achievement records for the selected **Academic Year**.

3. Click the **Behaviour** hyperlink to display the **Behaviour** panel.



4. Click the **New** button to display the **Add Behaviour** dialog. Alternatively, highlight an existing behaviour incident then click the **Open** button to display the **Edit Behaviour** dialog, which you can use to edit the details.

Adding/Editing Incident Details

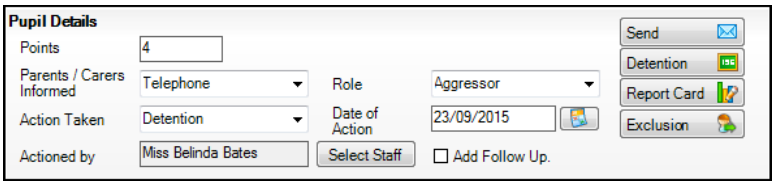


1. Complete the information in the **Incident Details** panel (please see *Adding/Editing a Behaviour Incident* on page *359*).
2. Click the **OK** button to return to the **Behaviour Management** page.

IMPORTANT NOTE: *If you edit the **Incident Details** of any pupil/student who is part of a behaviour incident involving multiple pupil/students (please see* Adding/Editing a Behaviour Incident *on page* 359*) and click the **OK** button, a message warns you that **Any changes made will apply to the other students linked to the incident**. Click the **Yes** button to update the change across all linked pupil/student's incident details. Alternatively, click the **No** button to return to the **Add** (or **Edit**) **Behaviour** dialog without saving the change.*

More Information:
Setting up Behaviour Types and Behaviour Role Types on page *357*

Adding/Editing Pupil/Student Details



1. In the **Pupil** (or **Student**) **Details** panel, the **Points** field displays the default number of points awarded for the selected behaviour type(s). The default points value is allocated to every pupil/student selected. This value can be amended according to the severity of the incident, if required.
2. Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents/Carers Informed** drop-down list.
3. Select the pupil/student's **Role** in the incident from the drop-down list, e.g. **Aggressor**, **Target**, **Witness**, etc.

*IMPORTANT NOTES: If you select a **Role** of **Target** or **Witness**, the **Points** field is set automatically to **0** to ensure that this incident does not have an adverse effect on their behaviour record.*

*If you select a **Role** of **Bystander**, you may wish to edit the behaviour **Points** to **0** manually for the same reason.*

4. If applicable, select the **Action Taken** from the drop-down list, e.g. **Detention**, **Discussed with Parents**, etc.
5. Enter the **Date of Action** or click the **Calendar** button then select the required date.
6. Select the member of staff who has actioned the sanction and to populate the **Actioned By** field by clicking the **Select Staff** button to display the **Select person** dialog. Search for and highlight the required person then click the **OK** button to return to the **Add** (or **Edit**) **Behaviour** dialog.

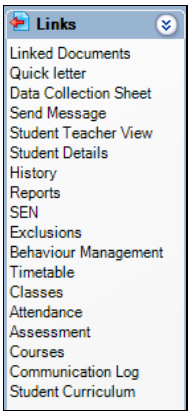
   When a pupil/student has been recorded as being involved in a behaviour incident, it is also possible to record details of any follow-up activities taken, or meetings held, in response to their involvement.
7. To record follow up details, select the **Add Follow Up** check box in the **Pupil Details** panel (please see *Recording Follow Up Details for Students Involved* on page *367*).
8. To send a message regarding the pupil/student to other members of staff, click the **Send** button to display the **Send Message** dialog, with the selected pupil/student displayed in the **Message** field (please see *Sending General Messages* on page *45*).
9. The following disciplinary actions can be recorded via the **Pupil/Student Details** panel:

   To set up a detention, click the **Detention** button to display the **Add Detention Details for** dialog for the selected pupil/student (please see *Adding/Editing Detentions* on page *409*).

   Users with sufficient permissions can create a report card. Click the **Report Card** button to display the **Report Card Details** dialog for the selected pupil/student.

Users with sufficient permissions can create an exclusion. Click the **Exclusion** button to display the **Add Exclusion** dialog (please see *Recording an Exclusion* on page *441*).

The **Links** panel is displayed on the right-hand side of the Behaviour Management page. This panel is used to access various areas of SIMS relating to the selected pupil/student. For example, highlighting **Joseph Jensen** then clicking the **Pupil Details** link displays Joseph's full details on the **Pupil (or Student) Details** page, whereas any exclusions recorded against him can be displayed by clicking the **Exclusions** link, etc (please see *Using the Pupil/Student Links Panel* on page *145*).



Adding/Editing the Other Staff Involved

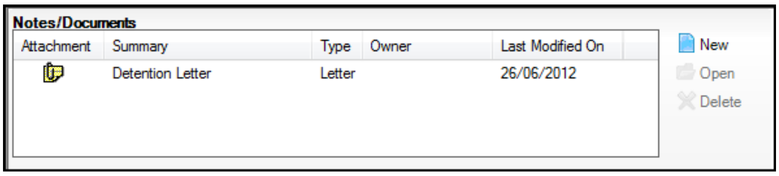
Once the record is saved for the first time, the **Other Staff Involved** panel displays the name of the user who is recording the incident.

1. Complete the information in the **New Behaviour Staff Link** panel (please see *Adding/Editing the Staff Involved* on page *362*).
2. Click the **OK** button to return to the **Behaviour Management** page.

Adding Notes/Documents

It is possible to attach any files or documents, such as a statement from the child or staff member, a letter sent home to the pupil/student's parent/guardians, etc.

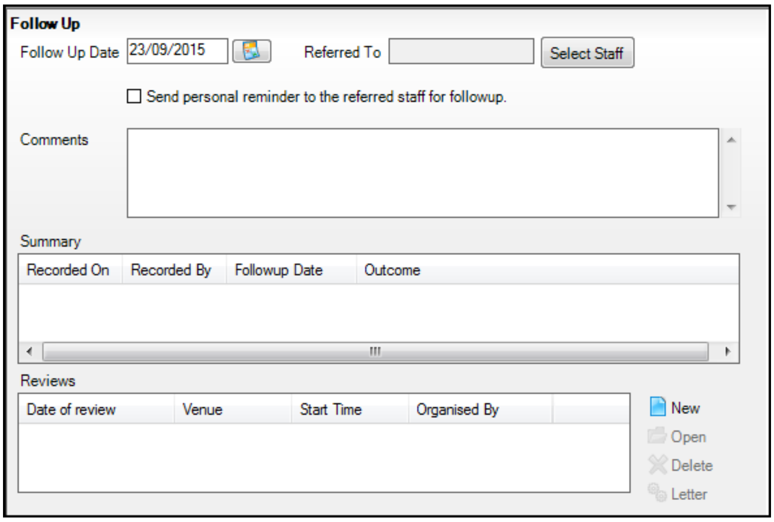
Add a note/document (please see *Attaching a New Note/Document* on page *147*) then click the **OK** button to return to the **Add** (or **Edit**) **Behaviour** dialog. The note, together with any associated attachment, is displayed in the **Notes/Documents** panel.



Recording Follow Up Details

When a pupil/student has been recorded as being involved in a behaviour incident, it is also possible to record details of any follow-up activities taken, or meetings held, in response to their involvement.

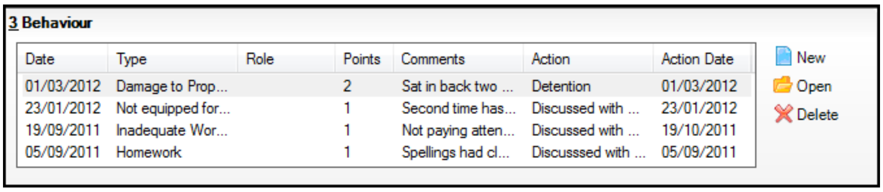
Follow up details are recorded by selecting the **Add Follow Up** check box in the **Pupil Details** panel of the **Add Behaviour** dialog, accessed from the **Behaviour Management** page (via **Focus | Behaviour Management | Student Behaviour**). Details can then be recorded in the **Follow Up** panel, which is displayed at the bottom of the dialog.



1. Complete the information in the **Follow Up** panel (please see *Recording Follow Up Details for Students Involved* on page *367*).
2. Click the **OK** button to return to the **Behaviour Management** page.

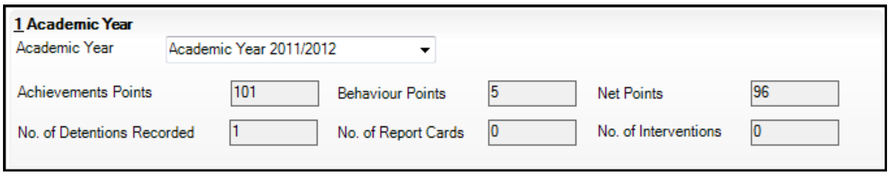
Saving the Behaviour Incident

1. Click the **OK** button to return to the **Behaviour Management** page. The incident is displayed in the **Behaviour** panel.



2. Click the **Save** button to save the behaviour incident.

The **Academic Year** panel displays the accumulated points total for all events recorded against this pupil/student for the selected academic year and serves as a useful overview of a pupil/student's conduct at your school. The **Net Points** field displays the total points attributed to the pupil/student as a result of subtracting the total behaviour points from the total achievement points. For example, if a pupil/student has accumulated 8 achievement points and 5 behaviour points, the **Net Points** total is 3.



A **Net Points** score above zero indicates generally positive behaviour, whereas a score below zero indicates generally negative behaviour.

Adding/Editing Initiatives Details

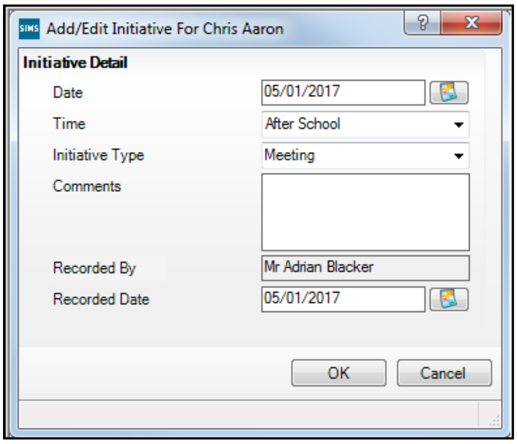
As part of the investigation and recording processes for when a behaviour incident occurs at your school, it is possible to record any communication regarding the incident with any interested parties. In SIMS, these communications are known as initiatives.

Initiatives might be used to discuss a pupil/student's behaviour with their parent/guardians or to record the occurrence of a meeting with interested parties. They are likely to be recorded prior to deciding what action to take with regard to a behaviour incident.

When recording initiative details, the values available from the **Initiative Type** drop-down list can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values (via **Tools | Lookups | Maintain**).

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.
2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.
3. Click the **Initiatives** hyperlink to display the **Initiatives** panel.

4. Highlight an existing intervention record then click the **Open** button or click the **New** button to display the **Add/Edit Initiative** dialog.



5. Enter the initiative **Date** or click the **Calendar** button then select a date. The date entered can be any time in the past (including past academic years) and for any future date in the current academic year.
6. Select the **Time** of the initiative from the drop-down list, e.g. **After School**.
7. Select the **Initiative Type** from the drop-down list, e.g. **Communication with Home** or **Meeting**.
8. Enter any **Comments** about the initiative, if required.

   The **Recorded By** date is populated with the name of the current user.
9. The **Recorded Date** is populated with today's date but can be edited by clicking the **Calendar** button then selecting the required date.
10. Click the **OK** button to return to the **Behaviour Management** page, where the information recorded is displayed in the **Initiatives** panel.
11. Remove an unwanted initiative record by highlighting it then clicking the **Delete** button adjacent to the table.
12. Click the **Save** button to save the record.

> *NOTE: The total number of initiatives for the selected pupil/student (**No. of Initiatives**) for the selected academic year is displayed in the **Academic Year** panel.*

Deleting a Behaviour Incident

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.
2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.
3. Click the **Behaviour** hyperlink to display the **Behaviour** panel.
4. Highlight the required incident then click the **Delete** button.
5. Click the **Save** button.

Reporting on Behaviour Incidents

Behaviour incidents and any associated **Change Log** status amendments can be reported on using SIMS reporting. A wide range of pre-defined behaviour reports is available via **Reports | Run Report**. For information on the latest pre-defined reports, please refer to the *SIMS Pre-Defined Reports Catalogue*.

14 | Recording Achievements

Introduction

Behaviour Management is used to record, monitor and manage pupil/student behaviour in your school and consists of the following four areas:

- Behaviour
- Achievements
- Detentions
- Report cards.

The Achievements area is used by schools to record incidences of positive or commendable behaviour, excellent test results, representing a sports team, etc. Information recorded in Behaviour Management can often be accessed via the **Links** panel on various pages in SIMS.

Each achievement can be allocated a number of points. Points are recorded against the pupil/student across their time at your school and a cumulative points total is available. This enables schools to monitor and compare points for behaviour and achievements. A net points total, which is the result of subtracting the number of behaviour points from the number of achievement points, provides a useful overview of a pupil/student's conduct in your school.

When recording achievements, some of the values available from drop-down lists can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values.

Recording Achievements

There are three methods of recording achievements:

- Record an achievement via the register (**Focus | Attendance** (or **Lesson Monitor**) **| Take Register**).
- Add an achievement to an individual pupil/student record, e.g. an excellent piece of art work.
- Record an achievement for multiple pupil/students, e.g. participation in the school play.

It is also possible to record additional achievement types in an achievement record. For example, a pupil/student may have displayed excellent effort in their greeting of other pupil/students on a school visit. In this case, a school visit achievement can be set up, with a second achievement type of excellent effort added to the record.

This section describes how to record an achievement and how to add the pupil/students involved. It is possible to record an achievement for a specific pupil/student.

The type of achievement, any related subjects and any staff involved can be recorded on the achievement record, together with any additional achievements attained at the time. It is also possible to link one or more documents to the achievement record to provide any required supplementary information, e.g. a certificate or merit.

It is possible to report on achievements using a wide range of pre-defined achievement reports (please see *Reporting on Achievements* on page *404*).

Additional Resources:

Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

More Information:

Recording an Individual Pupil/Student Achievement on page *400*
Reporting on Achievements on page *404*

Setting up Achievement Types

When recording achievements, some of the values available from drop-down lists can be edited to meet the specific needs of your school.

You can amend the types of achievement that can be recorded and assign a points value to each type using the **Maintain Achievement Types** page (via **Tools | Setups | Behaviour Management | Achievement Type**). You can also re-arrange the order in which achievement types are displayed in lists so that the achievements most frequently awarded can be accessed more easily. Additionally, achievement types can be made available via the register, enabling you to record an achievement while taking the register.

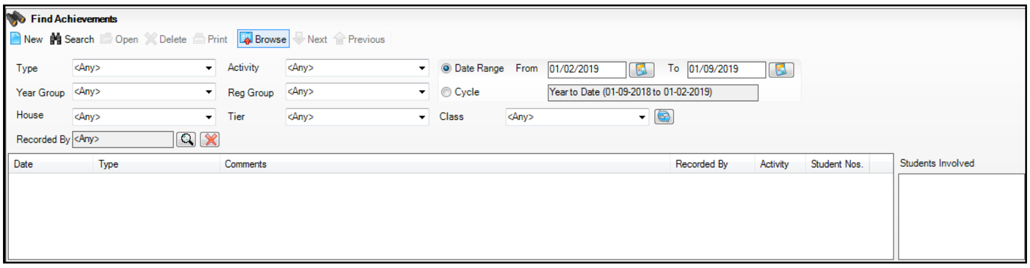
Additional Resources:

Setting Up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook
Taking the Register chapter of either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Searching for Existing Achievements

Before recording the details of an achievement, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific achievements. Alternatively, you can view an achievement from the pupil/student record of one of the pupil/students involved (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).

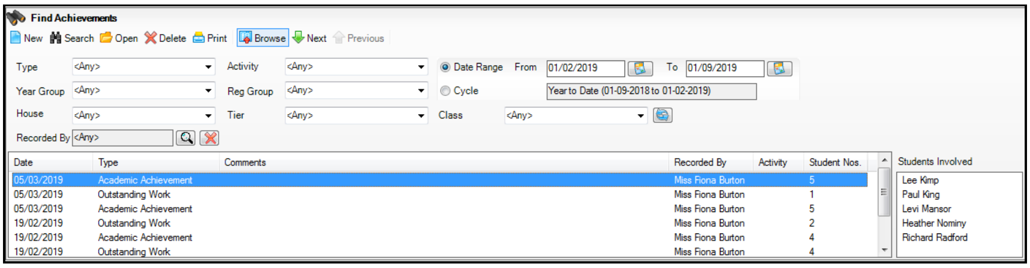
1. Select **Focus | Behaviour Management | Maintain Achievements** to display the **Find Achievements** browser.



2. Select an item from one or more of the following drop-down lists to filter the list of achievements: **Type** (e.g. **Excellent Effort**), **Activity** (e.g. **Science**), **Year Group**, **Class**, **House** and **Tier**. Users in Secondary schools can also search by **Reg Group**.
3. Define the date range of the search by:
   - selecting the **Date Range** radio button then entering the required date range in the **From** and **To** fields, or selecting from the Calendar. The default date range is from today to the last day of the current academic year.

     or
   - selecting the **Cycle** radio button then selecting the required date range from the drop-down list, e.g. **Year to Date**. The default date range is from the first day of the current academic year to today.
4. To search for achievements **Recorded By** a specific person, click the **Browser** button then search for and select the required person using the **Select person** dialog. This filter can be removed by clicking the **Delete Filter** button.

5. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all achievements on the date (or date range) specified.



A summary of each achievement is displayed in the results area, including the **Date** of the achievement, the achievement **Type**, the associated **Activity** and the number of pupil/students involved (**Student Nos**). The search results are displayed in reverse chronological order, so the most recent achievement is displayed at the top of the list.

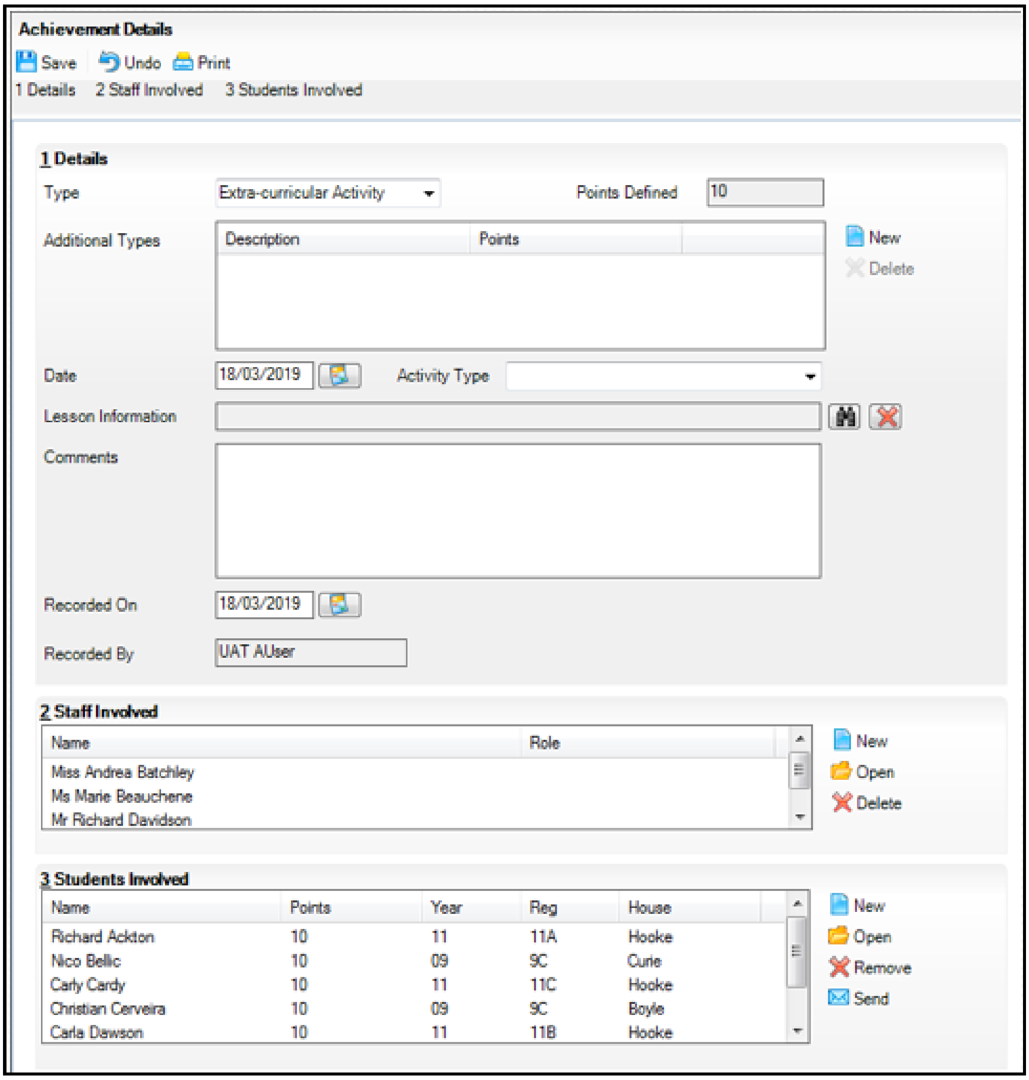
6. Highlight the achievement you wish to view or edit. The names of the **Students Involved** are displayed on the right-hand side of the highlighted achievement.
7. Click the **Open** button to display the **Achievement** page. If you cannot find the required record, click the **New** button to display the **Achievement Details** page.

> *NOTE: It is also possible to view an achievement from a pupil/student's record (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all achievements linked to this pupil/student by navigating to the **Achievement** panel.*

Adding/Editing an Achievement

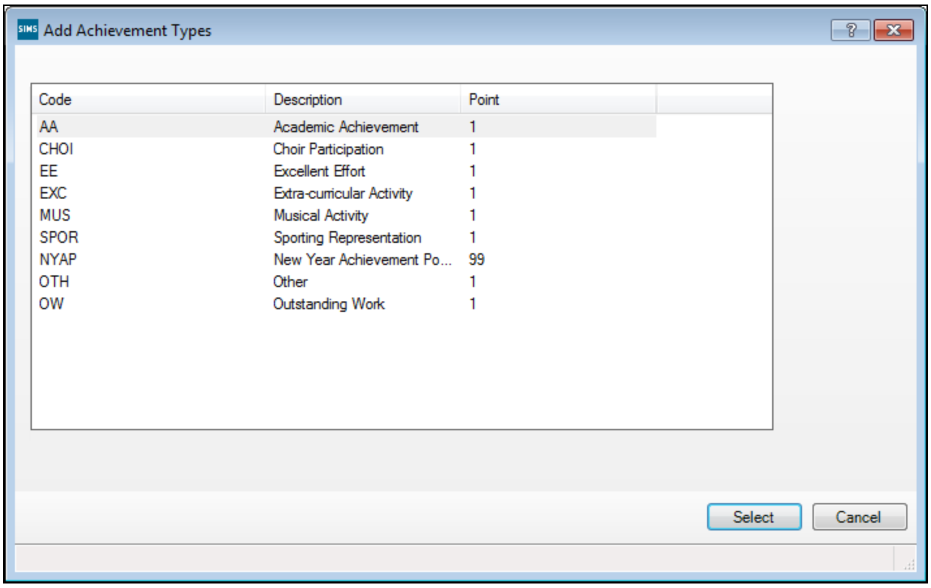
1. Select **Focus | Behaviour Management | Maintain Achievements** to display the **Find Achievements** browser.

2. Search for an existing achievement (please see *Searching for Existing Achievements* on page *391*) then click the **Open** button to edit its details on the **Achievement** page or click the **New** button to display the **Achievement Details** page.



3. Select the required achievement **Type** from the drop-down list, e.g. **Extra-curricular activity**. The **Points Defined** field displays the default value assigned to the achievement type and cannot be edited.

4. Additional achievement types can be added to the achievement record. For example, a pupil/student may have displayed excellent effort in their greeting of other pupil/students on a school visit. In this case, a school visit achievement can be set up, with a second achievement type of excellent effort added to the record. To add additional achievement types, click the **New** button adjacent to the **Additional Types** table to display the **Add Achievement Types** dialog.



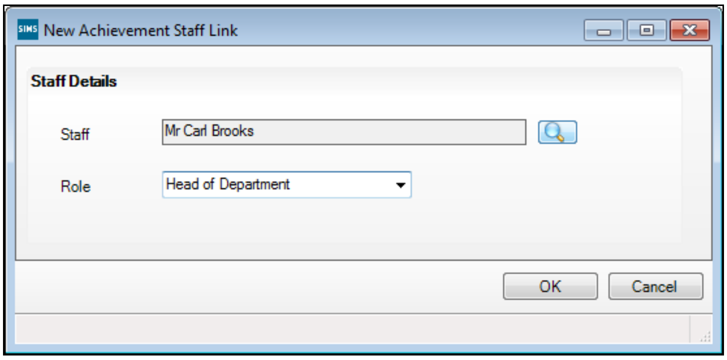
5. Highlight the required achievement type. Multiple achievement types can be selected by holding the **Ctrl** key and clicking each type. Click the **Select** button to return to the **Achievement Details** page, where the details of any added achievement types are displayed in the **Additional Types** table. Any unwanted additional types can be removed by highlighting them then clicking the **Delete** button adjacent to the table.
6. For a new achievement record, the **Date** of the achievement defaults to today. Amend the date if required, or click the **Calendar** button then select the required date.
7. Specify the **Lesson Information** associated with the achievement by clicking the **Search** button and selecting the lesson from the list displayed.
8. If applicable, select the **Activity Type**, e.g. **Music**.
9. Enter any **Comments** about the achievement.
10. For a new achievement record, the **Recorded On** field defaults to today's date. For an existing record, this field displays the date on which the achievement was initially recorded. This can be amended by editing the date or by clicking the **Calendar** button then selecting the required date.

    The name of the person recording the achievement is displayed in the **Recorded By** field.

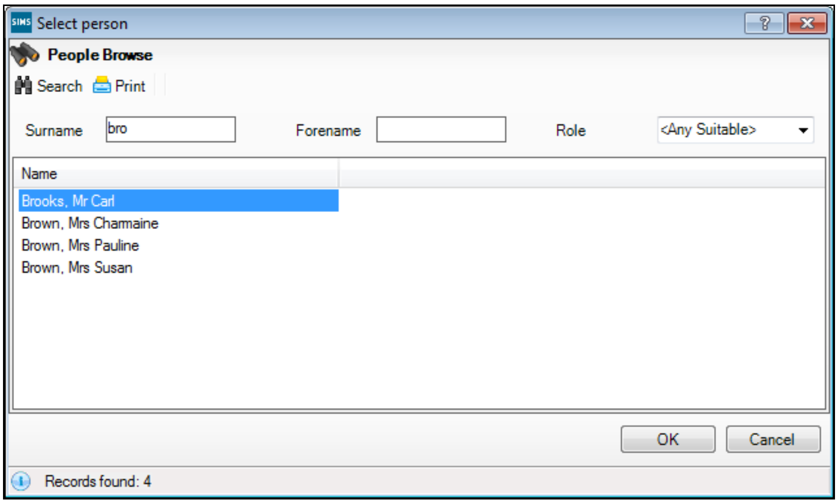
Recording the Staff Involved in the Achievement

Once the record is saved for the first time, the **Staff Involved** panel displays the name of the user who is recording the achievement.

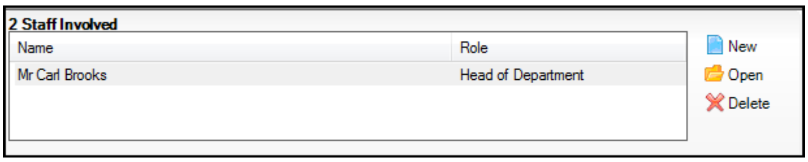
1. To specify additional or alternative members of staff involved in the achievement, either highlight the required member of staff in the **Staff Involved** panel then click the **Open** button to display the **Edit Achievement Staff** dialog or click the **New** button to display the **New Achievement Staff Link** dialog.



2. Click the **Browser** button adjacent to the **Staff** field to display the **Select person** dialog.



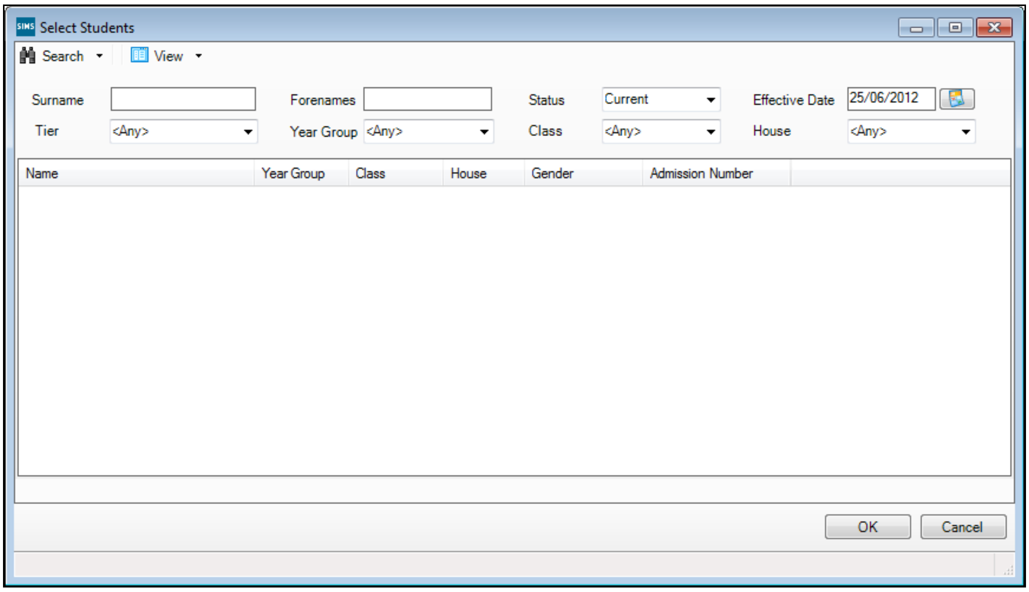
3. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
4. Highlight the required member of staff then click the **OK** button to return to the **New Achievement Staff Link** dialog.
5. Select the required **Role** from the drop-down list, e.g. **Head of Department** then click the **OK** button to return to the **Achievement** page. The selected member of staff is displayed in the **Staff Involved** panel.



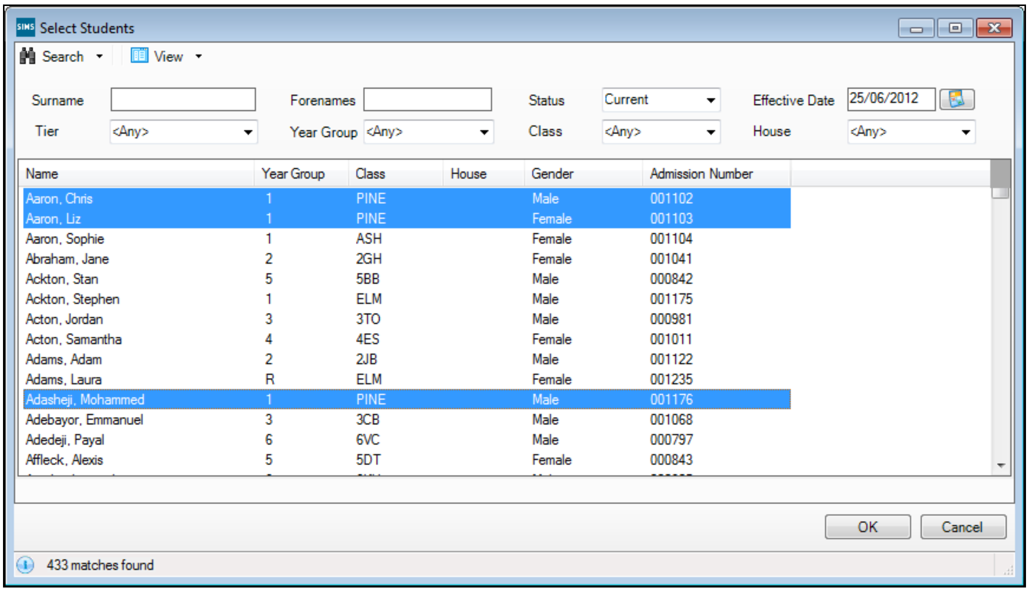
6. Repeat this process for any other members of staff involved in the achievement.
7. To remove a member of staff, highlight them then click the **Delete** button.

Recording the Pupil/Students Involved in the Achievement

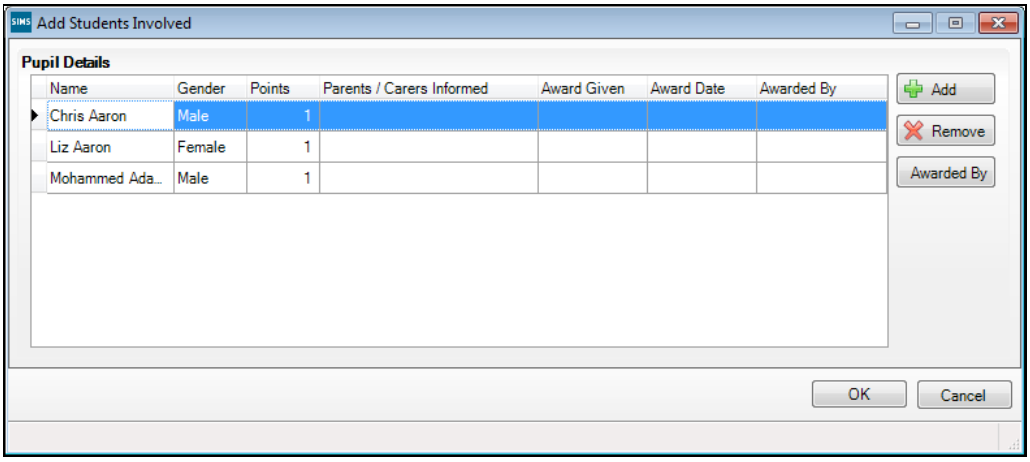
1. To specify the pupil/students involved in the achievement, click the **New** button in the **Students Involved** panel to display the **Select Students** dialog.



2. Enter any required search criteria or leave the fields blank to display all pupil/students then click the **Search** button.
3. Highlight the required pupil/student. Multiple pupil/students can be selected by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key then clicking to select a block of pupil/students.



4. Click the **OK** button to display the selected pupil/students in the **Add Students Involved** dialog.

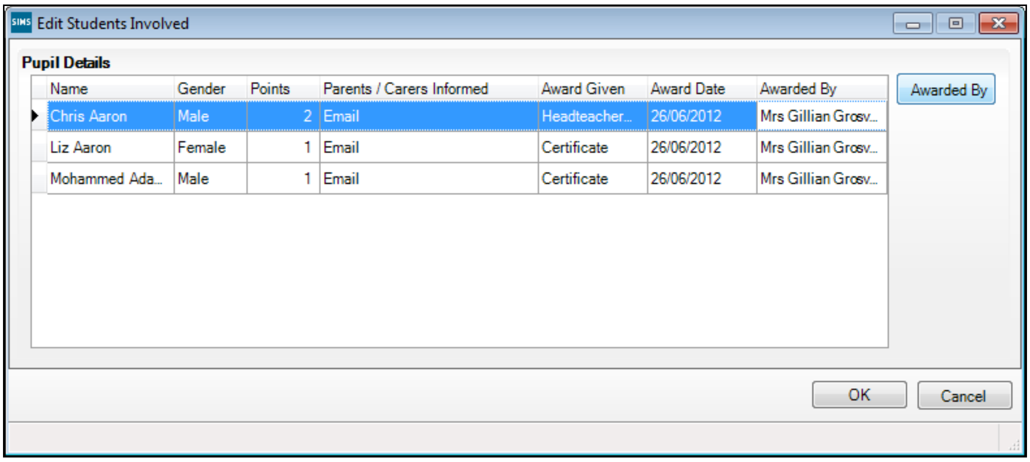


5. Additional pupil/students can be added by clicking the **Add** button to display the **Select Students** dialog then repeating steps 2 to 4. Pupil/students added in error can be removed by highlighting them then clicking the **Remove** button.

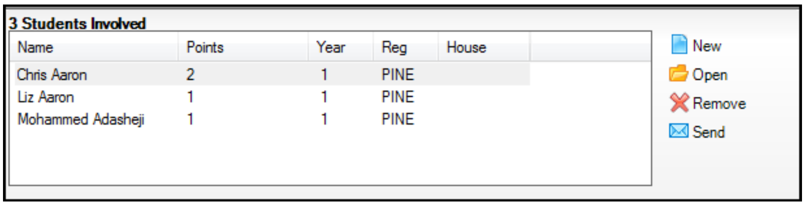
   For each pupil/student involved:

   - The **Points** field displays the default number of points awarded for the selected achievement(s). The default points value is allocated to every pupil/student selected. Additional or fewer points can be applied to individual pupil/students by clicking in the cell then overtyping the value.
   - Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents/Carers Informed** drop-down list.
   - If applicable, select the **Award Given** from the drop-down list, e.g. **Commended**, **Points Awarded**, etc.
   - Enter the **Award Date** in the cell or click in the cell then select the required date from the drop-down list.
   - To select the member of staff who presented the award and to populate the **Awarded By** field, click the **Awarded By** button to display the **Select person** dialog, search for and highlight the required person then click the **OK** button to return to the **Add Students Involved** dialog.

> *TIP: It is possible to select multiple pupil/students in the **Add Students Involved** dialog by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Award Given** from the drop-down list and all highlighted pupil/students are assigned the selected **Award Given**. This also applies to the **Points** and **Parents/Carers Informed** drop-down lists.*

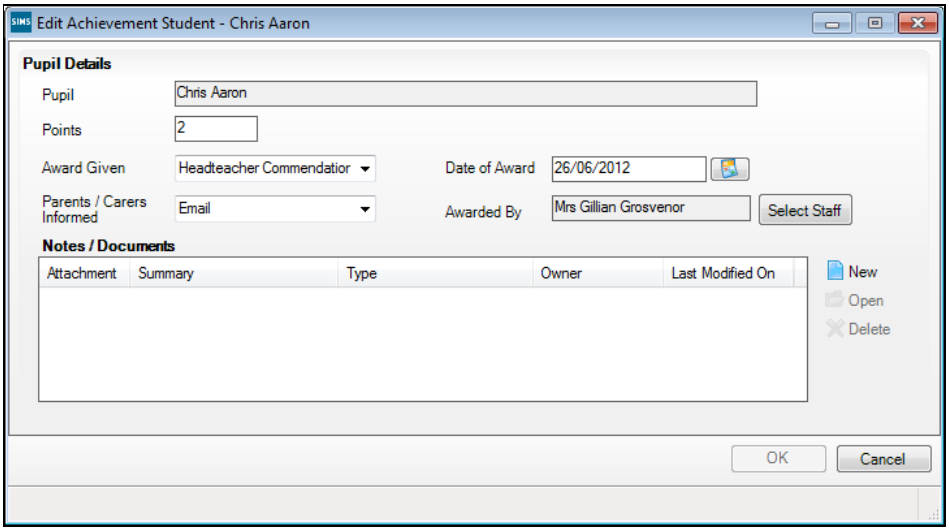


6. When all the necessary details have been entered, click the **OK** button to return to the **Achievement** page. The details of all pupil/students involved are displayed in the **Students Involved** panel.



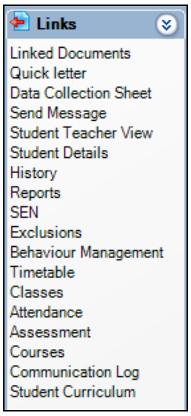
7. If you have added a pupil/student to the **Students Involved** panel in error, highlight them and click the **Delete** button to remove them.

8. To edit the individual achievement details of a pupil/student added in step 5, highlight their name then click the **Open** button to display the **Edit Achievement Student** dialog. To edit the behaviour details of multiple pupil/students, highlight their names then click the **Open** button to display the **Edit Students Involved** dialog.



9. Attach any **Notes/Documents** such as a copy of the letter sent to the parent/guardians, if required.
10. Click the **OK** button to confirm the details and return to the **Achievement** page.
11. Click the **Save** button to save your changes.

    The **Links** panel is displayed on the right-hand side of the **Achievement** page. This panel is used to access various areas of SIMS relating to the pupil/student highlighted in the **Students Involved** panel. For example, highlighting Chris Aaron then clicking the **Pupil Details** link displays Chris' full details on the **Pupil** (or **Student**) **Details** page, whereas any exclusions recorded against him can be displayed by clicking the **Exclusions** link, etc (please see *Using the Pupil/Student Links Panel* on page *145*).



More Information:
Attaching a New Note/Document on page *147*

Saving the Achievement

Once all the required information has been entered, click the **Save** button to save the record.

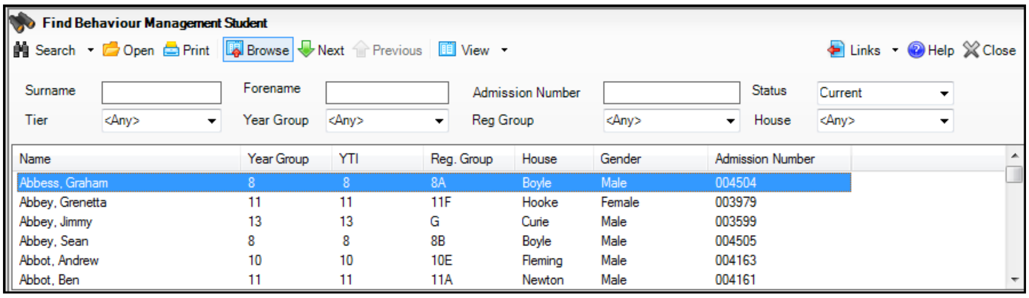
Recording an Individual Pupil/Student Achievement

This section describes how to record or edit an achievement for an individual pupil/student. One or more documents can be linked to the achievement record so that the required supplementary information can also be recorded.

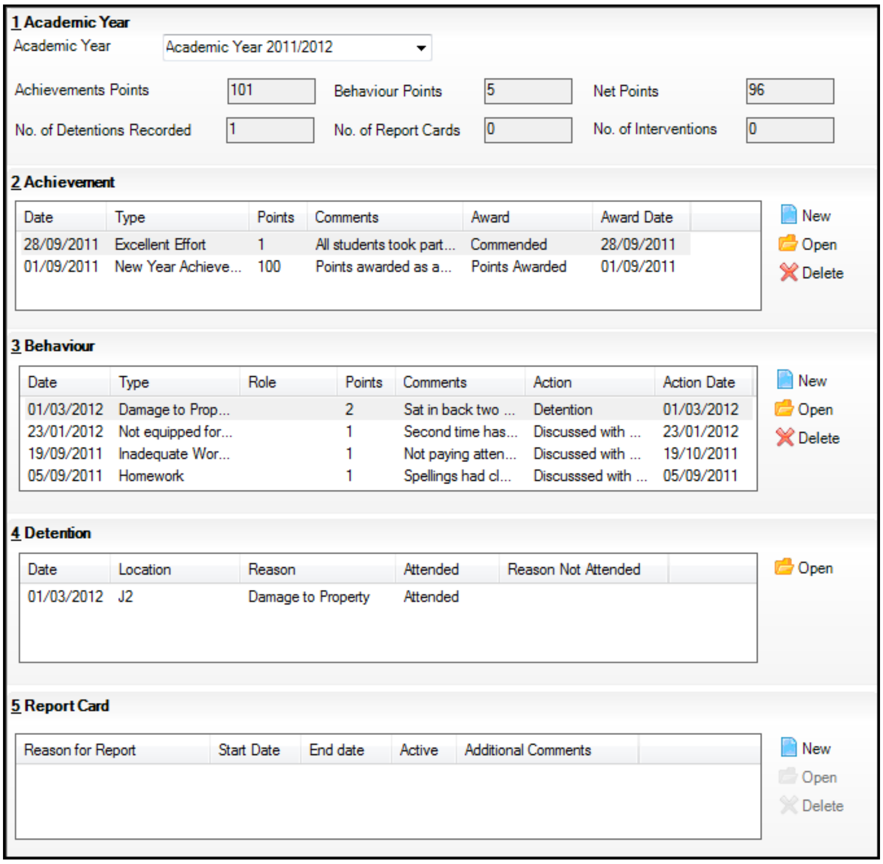
It is also possible to record an achievement then identify the pupil/students involved (please see *Adding/Editing an Achievement* on page *392*).

1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.

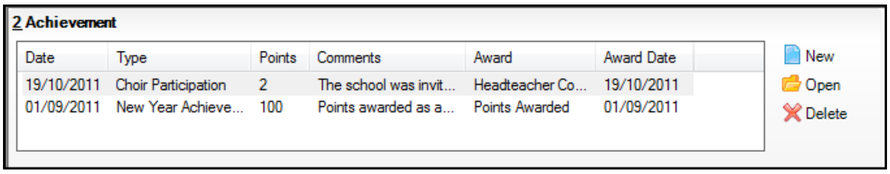
> *NOTE: It is also possible to add achievements via the* ***Links*** *panel on the* ***Pupil*** *(or* ***Student****)* ***Details*** *page (via* ***Focus | Pupil*** *(or* ***Student****)* ***| Pupil*** *(or* ***Student****)* ***Details****). Click the* ***Behaviour Management*** *hyperlink in the* ***Links*** *panel to display the* ***Behaviour Management*** *page.*



2. Search for and highlight the required pupil/student then click the **Open** button to display their details on the **Behaviour Management** page.

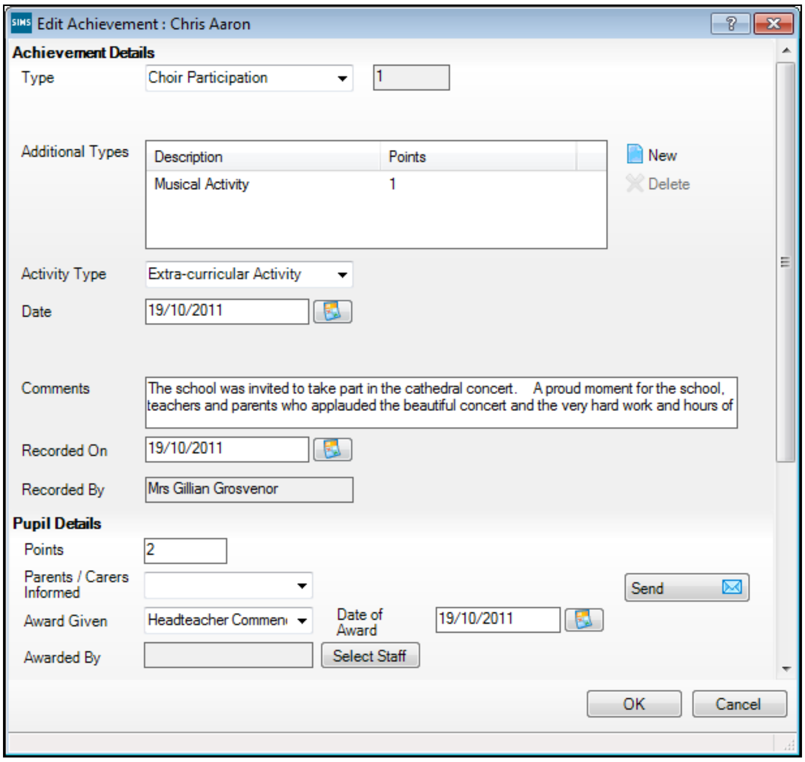


3. Click the **Achievement** hyperlink to display the **Achievement** panel.



4. Click the **New** button to display the **Add Achievement** dialog. Alternatively, highlight an existing achievement then click the **Open** button to display the **Edit Achievement** dialog, which you can use to edit the details.

Recording Achievement Details



1. Complete the information in the **Achievement Details** panel (please see *Adding/Editing an Achievement* on page *392*).
2. Click the **OK** button to return to the **Behaviour Management** page.

IMPORTANT NOTE: *If you edit the* ***Achievement Details*** *of any pupil/student who is part of an achievement involving multiple pupil/students (please see* Adding/Editing a Behaviour Incident *on page* 359*) and click the* ***OK*** *button, a message warns you that* ***Any changes made will apply to the other students linked to the Achievement****. Click the* ***Yes*** *button to update the change across all linked pupil/student's achievement details. Alternatively, click the* ***No*** *button to return to the* ***Add*** *(or* ***Edit****)* ***Achievement*** *dialog without saving the change.*

Recording the Pupil/Student Details

1. In the **Pupil** (or **Student**) **Details** panel, the **Points** field displays the default number of points awarded for the selected achievement type(s). The default points value is allocated to every pupil/student selected. This value can be amended according to the level of achievement, if required.

2. Select the method by which the pupil/student's parent/guardians have been informed, if applicable, from the **Parents/Carers Informed** drop-down list.
3. Select the **Award Given** from the drop-down list, e.g. **Headteacher Commendation**.
4. The **Date of Award** defaults to today's date but can be amended, if required. Enter the date or click the **Calendar** button then select the required date.
5. Select the member of staff who presented the award and to populate the **Awarded By** field by clicking the **Select Staff** button to display the **Select person** dialog. Search for and highlight the required person then click the **OK** button to return to the **Add** (or **Edit**) **Achievement** dialog.
6. To send a message regarding the pupil/student to other members of staff, click the **Send** button to display the **Send Message** dialog, with the selected pupil/student displayed in the **Message** field (please see *Sending General Messages* on page *45*).

Recording the Other Staff Involved

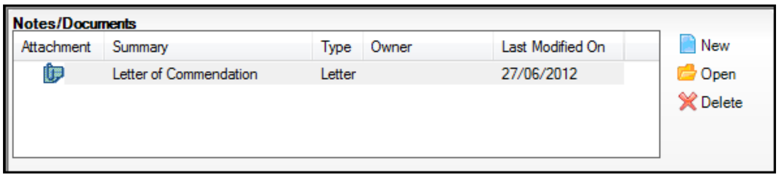
Once the record is saved for the first time, the **Other Staff Involved** panel displays the name of the user who is recording the achievement.

1. Complete the information in the **New Achievement Staff Link** panel.
2. Click the **OK** button to return to the **Behaviour Management** page (please see *Recording the Staff Involved in the Achievement* on page *395*).

Recording Notes/Documents

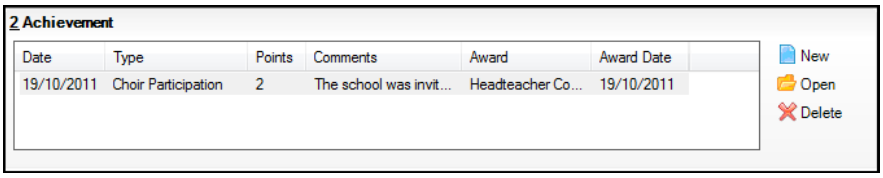
It is possible to attach any files or documents, such as a pupil/student's letter of commendation sent by the headteacher to the pupil/student's parent/guardians, etc.

Add a note/document (please see *Attaching a New Note/Document* on page *147*) then click the **OK** button to return to the **Add** (or **Edit**) **Achievement** dialog. The note, together with any associated attachment, is displayed in the **Notes/Documents** panel.



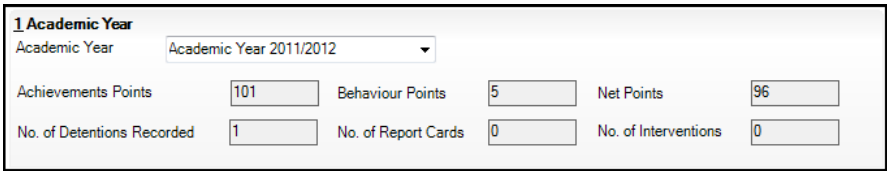
Saving the Achievement

1. Click the **OK** button to return to the **Behaviour Management** page. The achievement is displayed in the **Achievement** panel.



2. Click the **Save** button to save the achievement.

The **Academic Year** panel displays the accumulated points total for all events recorded against this pupil/student for the selected academic year and serves as a useful overview of a pupil/student's conduct at your school. The **Net Points** field displays the total points attributed to the pupil/student as a result of subtracting the total behaviour points from the total achievement points. For example, if a pupil/student has accumulated 8 achievement points and 5 behaviour points, the **Net Points** total is 3.



A **Net Points** score above zero indicates generally positive behaviour, whereas a score below zero indicates generally negative behaviour.

Deleting Achievements

1. Select **Focus | Behaviour Management | Maintain Achievements** to display the **Find Achievements** browser.
2. Search for and highlight the required achievement then click the **Delete** button.
3. Confirm that you wish to delete the achievement record by clicking the **Yes** button.

Reporting on Achievements

Achievements can be reported on using SIMS reporting. A wide range of pre-defined achievement reports is available via Reports | Run Report. For more information on the latest pre-defined reports, please refer to the *SIMS Pre-Defined Reports Catalogue*.

15| Recording Detentions

Introduction

Schools can use detentions as part of their Behaviour Policy. Detentions can vary in severity from missing a break during the day to being detained after school. For serious offences, pupil/students can be referred to the Head Teacher, who may decide to monitor them after school on a weekly basis. Recurring detentions can be set up in such cases.

Detentions can be imposed by a Head Teacher or another teacher with sufficient authorisation. Prior to arranging a detention, teachers should take account of:

- the pupil/student's age
- the Special Educational Needs of the pupil/student
- their religious requirements
- whether the parent/guardians can, within reason, arrange for the pupil/student to return home from school after the detention.

Although detentions form part of a school's Behaviour Policy, the school must give the parent/guardians sufficient written notice (usually at least 24 hours) of a detention scheduled to take place during lunchtime or after school, so that they are given time to notify the school of any issues that the detention might cause.

Written notification must be sent to parent/guardians to inform them:

- that the pupil/student has been given a detention
- why the detention was given
- when the detention is taking place
- where the detention is taking place
- the duration of the detention.

Schools are required to keep a written record of any detentions given for legal reasons, together with the reason(s) for imposing the detention, in case there is a legal challenge brought by parent/guardians.

Methods of Recording Detentions

To record a detention and to indicate where it is taking place, rooms must be set up in SIMS. This ensures that you can inform parents when the detention is taking place, where it is scheduled to take place and its duration. The types of detention employed by your school must be defined prior to detentions being recorded.

There are four methods of recording a detention:

- Record a behaviour incident for an individual pupil/student then add the detention in the incident record (please see *Adding/Editing an Individual Pupil/Student Behaviour Incident* on page *379*). For this method, use **Focus | Behaviour Management | Student Behaviour** and **Focus | Behaviour Management | Maintain Behaviour Incidents**.
- Record a behaviour incident for several pupil/students then add the detention at the same time (please see *Recording Behaviour Incidents* on page *356*). For this method, use **Focus | Behaviour Management | Maintain Behaviour Incidents**).
- Record a detention for one or more pupil/students then add one or more new behaviour incidents (please see *Adding/Editing Detentions* on page *409*). For this method, use **Focus | Behaviour Management | Maintain Detentions**.
- Record a behaviour incident for one or more pupil/students, set up a new detention (please see *Adding/Editing Detentions* on page *409*) then link the existing behaviour incidents to the detention. For this method, use **Focus | Behaviour Management | Student Behaviour** <u>or</u> **Focus | Behaviour Management | Maintain Behaviour Incidents**, then **Focus | Behaviour Management | Maintain Detentions**.

WARNING: *If a detention is added via* ***Focus | Behaviour Management | Maintain Detentions*** *and it is not linked to any appropriate existing behaviour incidents, when the record is saved a new behaviour incident is created for each of the associated pupil/students. Therefore when creating a detention via this route, you* ***<u>must</u>*** *link any existing behaviour incidents to the detention before saving the record (please see* Linking Existing Behaviour Incidents to a Detention *on page* 416*).*

Additional Resources:

Adding/Editing Rooms in the *Setting up and Administering SIMS* handbook

Setting up Behaviour Management chapter of the *Setting Up and Administering SIMS* handbook

Setting up Detention Types

When recording detentions, some of the values available from drop-down lists can be edited to meet the specific needs of your school.

You can re-arrange the order in which detention types are displayed in lists so that the most frequently recorded detention types can be accessed more easily. Additionally, the types of detention that can be recorded can be amended and recurring detentions can be set up using detention types.

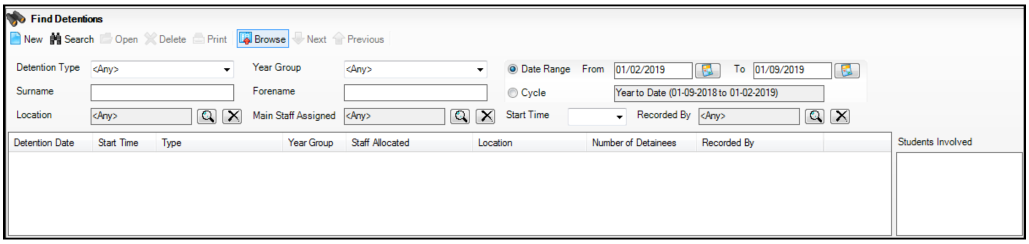
Additional Resources:

Setting Up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook

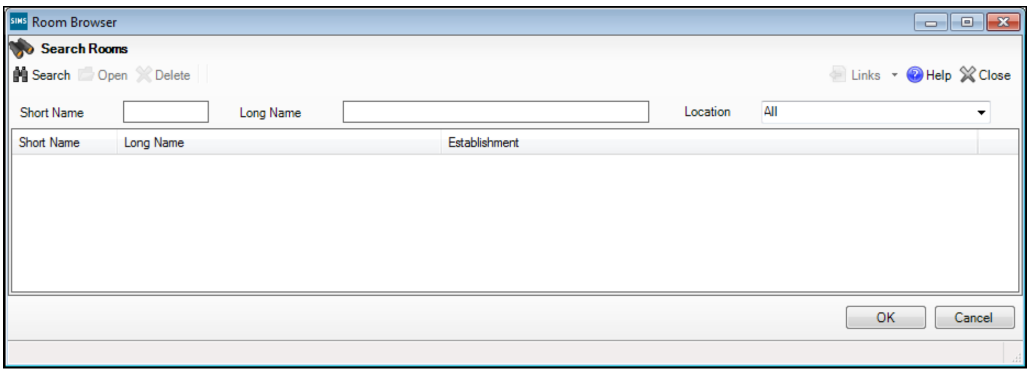
Searching for an Existing Detention

Before recording the details of a detention, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific detentions, e.g. you can view a list of all the detentions that have arisen by location in the current academic year. Alternatively, you can view a detention from the pupil/student record of one of the pupil/students involved (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** browser.



2. Select the required **Detention Type** from the drop-down list, e.g. **Headteacher's Detention**, and the **Year Group** to which the detention relates.
3. Enter the **Surname** and **Forename** of one of the detainees, if required.
4. Search for the detention by **Location** by clicking the adjacent **Browser** button to display the **Room** dialog. This filter can be removed by clicking the **Clear Location** button.

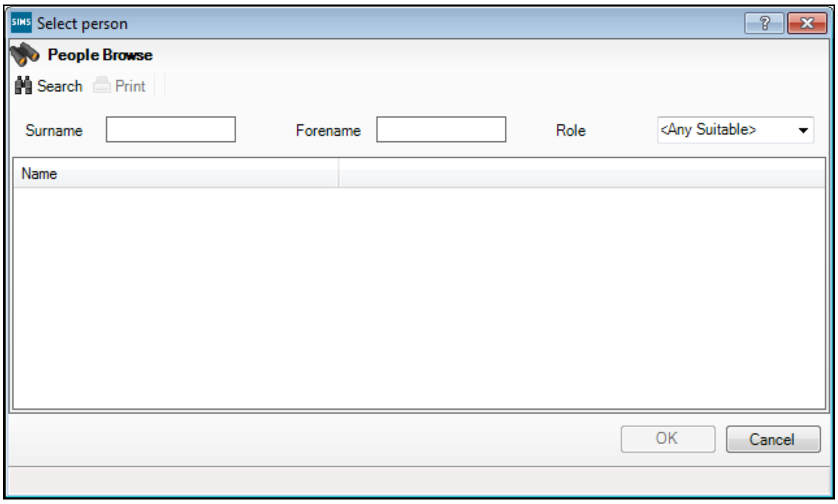


a. Enter the **Short Name** or **Long Name** of the required room, or select its **Location** from the drop-down list.

b. Click the **Search** button to search for the required room.

c. Highlight the required room then click the **OK** button to return to the **Find Detentions** browser, where the **Location** is displayed.

5. Search for the detention by **Main Staff Assigned** by clicking the adjacent **Browser** button then searching for the required person using the **Select person** dialog. This filter can be removed by clicking the **Clear Staff Assigned** button.



a. Enter the **Surname** or **Forename** of the required person, or select their **Role** from the drop-down list.

b. Click the **Search** button to search for the required person.

c. Highlight the required person then click the **OK** button to return to the **Find Detentions** browser, where the **Main Staff Assigned** is displayed.

6. Select the **Start Time** of the detention from the drop-down list, if required.

7. Define the date range for the search by:

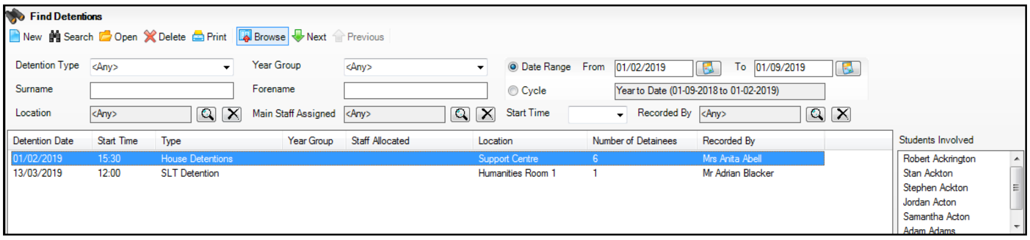
   - selecting the **Date Range** radio button then entering the required date range in the **From** and **To** fields, or selecting from the Calendar. The default date range is from today to the last day of the current academic year.

     or

   - selecting the **Cycle** radio button then selecting the required date range from the drop-down list, e.g. **Year to Date**. The default date range is from the first day of the current academy year to today.

     The search results are displayed in descending **Date** order when searching by **Cycle**, so the most recent behaviour incident is displayed at the top of the list.

8. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all detentions on the date (or date range) specified.



A summary of each detention is displayed in the results area, including the **Detention Date** and **Start Time**, the **Location**, its **Status** and the number of pupil/students involved (**Number of Detainees**). The search results are displayed in ascending **Detention Date** order, so the most recent detention is displayed at the bottom of the list.

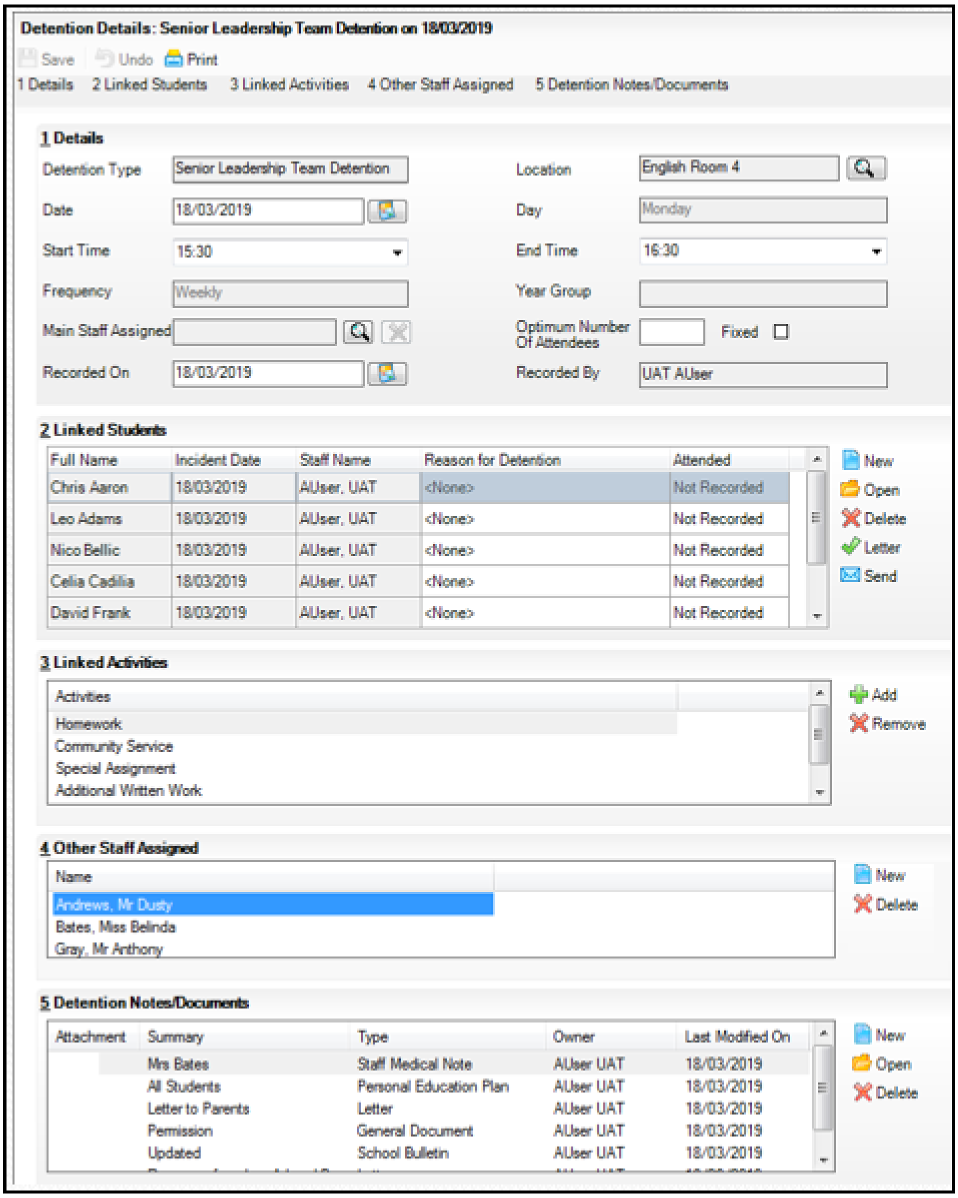
9. Highlight the detention you wish to view or edit. The names of the **Students Involved** are displayed on the right-hand side of the highlighted detention.
10. Click the **Open** button to display the **Detention Details** page. If you cannot find the required record, click the **New** button to display the **Detention Details** page.

> *NOTE: It is also possible to view a detention from a pupil/student's record (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all detentions linked to this pupil/student by navigating to the **Detention** panel.*

Adding/Editing Detentions

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** browser.

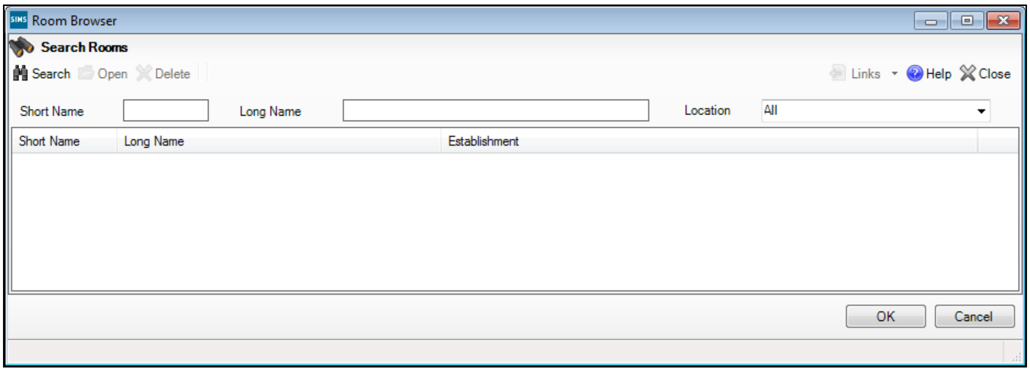
2. Search for an existing detention (please see *Searching for an Existing Detention* on page *407*) then click the **Open** button to edit its details or click the **New** button to display the **Detention Details** page.



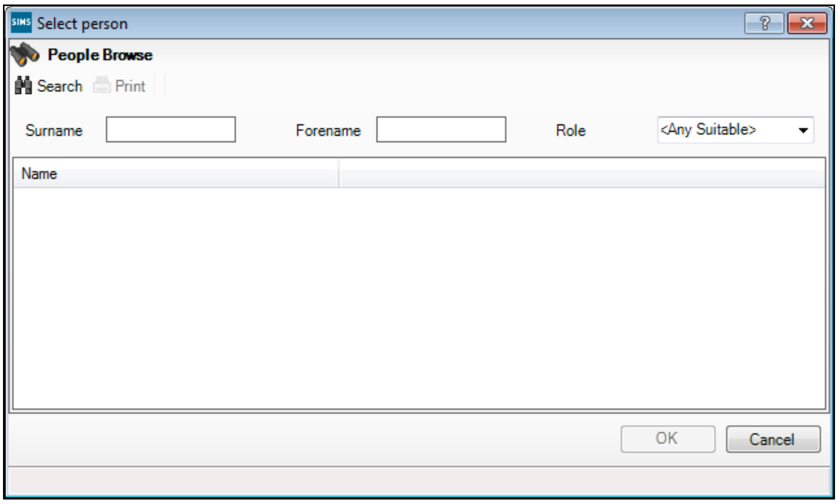
3. Select the required **Detention Type** from the drop-down list, e.g. **Senior Leadership Team Detention**. If you are editing an existing detention record, this field cannot be edited.

   Once the **Detention Type** is selected, the following fields are populated automatically: **Location**, **Day**, **Start Time**, **End Time**, **Frequency** and **Year Group**. These default values are defined in the detention type (via **Tools | Setups | Behaviour Management | Detention Type**). The **Day** and the **Frequency** cannot be edited but the remaining fields can. For example, a detention of a certain type is usually held in the same room but for one instance, it must be held elsewhere due to refurbishment so the default room can be overwritten with an alternative.

4. Select the **Location** of the detention by clicking the adjacent **Browser** button to display the **Room** dialog.



   a. Enter the **Short Name** or **Long Name** of the required room, or select its **Location** from the drop-down list.
   b. Click the **Search** button to search for the required room.
   c. Highlight the required room then click the **OK** button to return to the **Detention Details** page, where the **Location** is displayed.
5. Enter the **Date** of the detention or click the **Calendar** button then select the required date.
6. Edit the detention **Start Time** and **End Time** by selecting from the drop-down lists, if required.
7. Select the **Main Staff Assigned** to the detention by clicking the adjacent **Browser** button then searching for the required person using the **Select person** dialog. This member of staff can be removed by clicking the **Clear Staff Assigned** button or by repeating this step and selecting another person.



   a. Enter the **Surname** or **Forename** of the required person, or select their **Role** from the drop-down list.
   b. Click the **Search** button to search for the required person.
   c. Highlight the required person then click the **OK** button to return to the **Detention Details** page, where the **Main Staff Assigned** is displayed.

8. The **Optimum Number Of Attendees** field defaults to the value set in the **Maximum Group Size** field of the selected room (via **Focus | School | Rooms**). If the **Maximum Group Size** field is blank, the **Optimum Number of Attendees** field will default to blank. This value can be edited for the selected detention session only (i.e. it does not affect the default value assigned to the room).
9. If you wish to enforce a rule that ensures no more than the **Optimum Number Of Attendees** attend the detention session, select the **Fixed** radio button.

> ***IMPORTANT NOTES:*** *The aggregate of the content of the* ***Optimum Number Of Attendees*** *field and the selection or deselection of the* ***Fixed*** *radio button determines what happens when the record is saved. If the number of* ***Linked Students*** *is less than or equal to the* ***Optimum Number Of Attendees****, the record is saved. In all other circumstances, an information or warning message is displayed. Follow the on-screen instructions to complete the process.*

10. The **Recorded On** field defaults to today but can be edited by clicking the **Calendar** button then selecting the required date.
11. The **Recorded By** field displays the name of the current SIMS user and cannot be changed.
12. Click the **Save** button before completing the remaining panels on the **Detention Details** page.

> *NOTES: The information or warning message displayed differs depending on the circumstances. Follow the on-screen instructions to complete the process.*

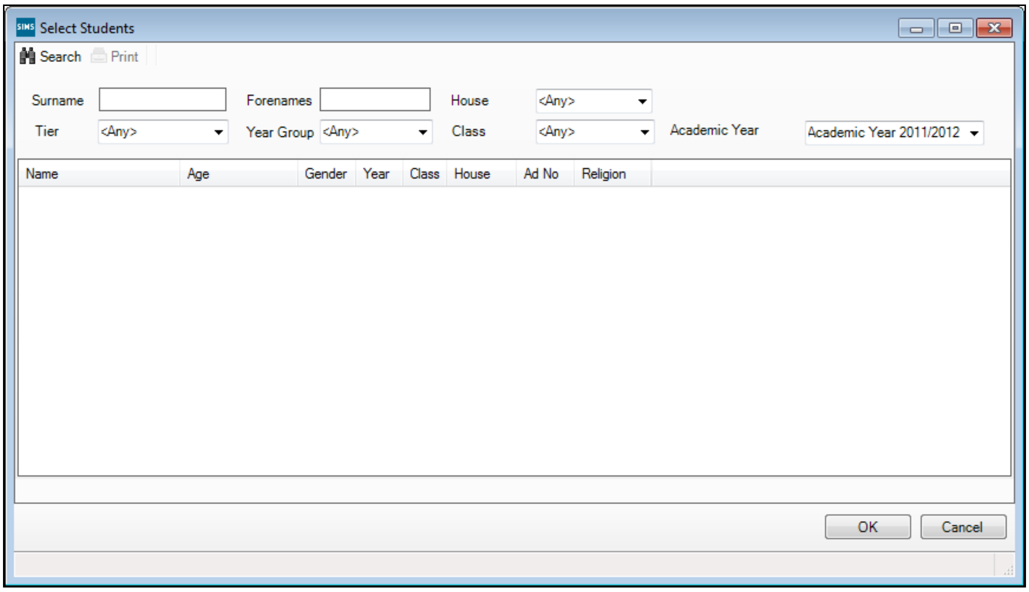
Additional Resources:

Setting Up Behaviour Management chapter of the *Setting Up and Administering SIMS* handbook

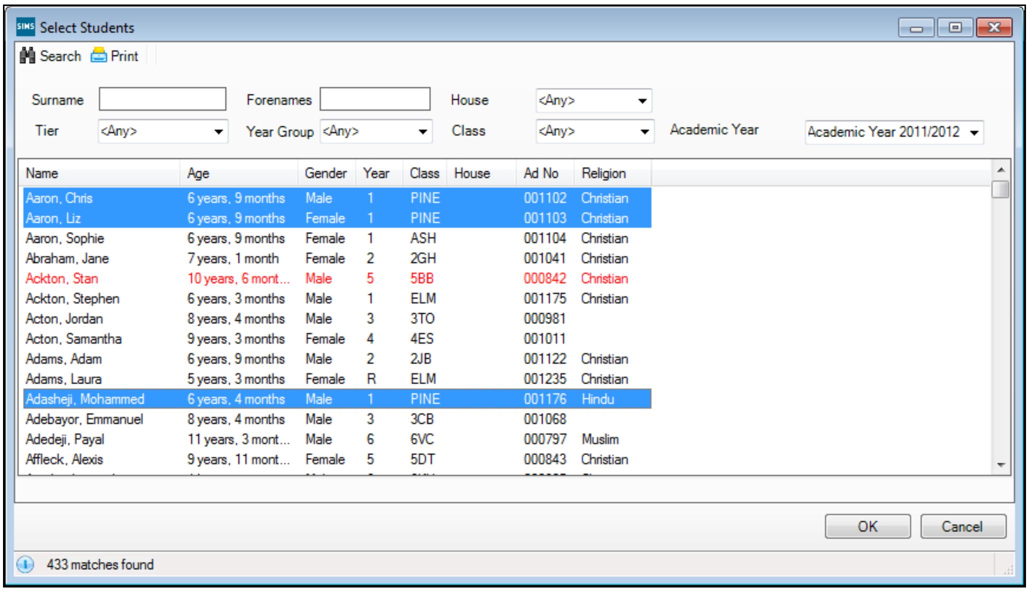
Assigning Pupil/Students to the Detention

1. To specify the pupil/students who will be attending the detention, click the **New** button in the **Linked Students** panel to display the **Select Students** dialog.

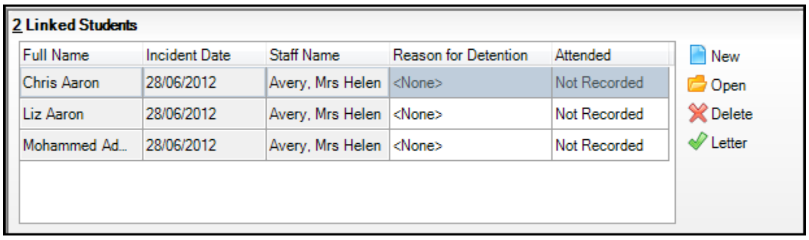
*NOTE: When accessing the **Detention Details** page from a pupil/student's behaviour incident record (by clicking the **Behaviour Management** hyperlink in the **Links** panel), it is not possible to assign additional pupil/students to a detention. Instead, you should assign additional pupil/students via **Focus | Behaviour Management | Maintain Detentions**.*



2. Enter any required search criteria or leave the fields blank to display all pupil/students then click the **Search** button.
3. Highlight the required pupil/student. Multiple pupil/students can be selected by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key then clicking to select a block of pupil/students.



4. Click the **OK** button to return to the **Detention Details** page, where the selected pupil/students are displayed.



5. For each pupil/student involved, the following information is displayed:
   - Their **Full Name**, the **Incident Date** and the name of the person who added them to the detention record (**Staff Name**).

     IMPORTANT NOTE: *Before selecting a* ***Reason for Detention****, please read the following topic (please see* Recording the Reason for Detention *on page* 415*).*

   - Select the pupil/student's **Reason for Detention** from the drop-down list, e.g. **Damage to Property**, **Defiance**, **Disruptive Behaviour**, etc.
   - If applicable, indicate whether they have **Attended** the detention session by selecting from the drop-down list. This defaults to **Not Recorded** and should be changed only when the detention session has taken place.

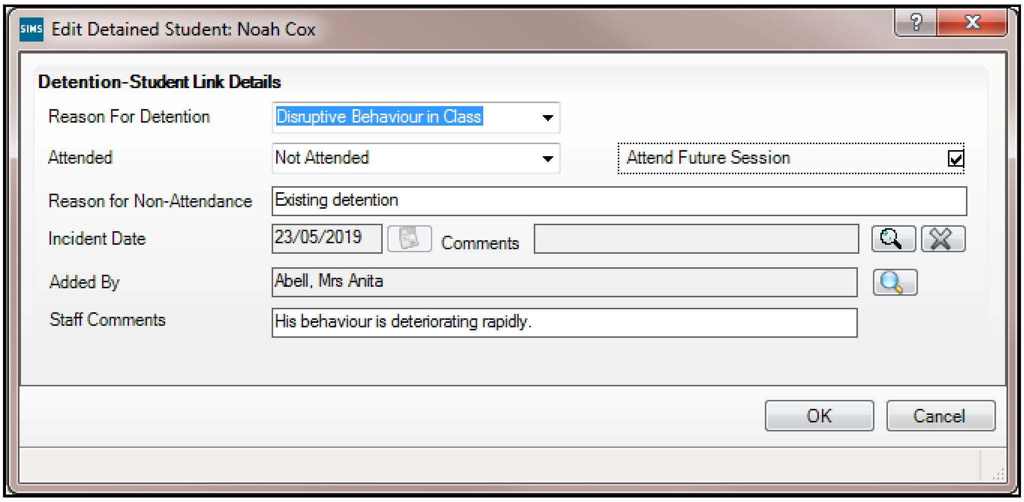
TIP: It is possible to select multiple pupil/students in the ***Linked Students*** *panel by holding the* ***Ctrl*** *key then clicking each pupil/student, or by holding the* ***Shift*** *key to select a block of pupil/students. For example, you can hold the* ***Shift*** *key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's* ***Reason for Detention*** *from the drop-down list and all highlighted pupil/students are given the selected* ***Reason for Detention****. This also applies to the* ***Attended*** *drop-down list.*

6. Pupil/Students added in error can be removed by highlighting them then clicking the **Delete** button.

More Information:
Adding/Editing Detentions on page *409*

Editing a Pupil/Student's Detention Record

1. In the **Linked Students** panel, highlight the pupil/student's name and click the **Open** button to display the **Edit Detained Student** dialog.



2. Select the **Reason for Detention** from the drop-down list.
3. Select the **Attended** status from the drop-down list. If **Not Attended** is selected, the **Reason for Non-Attendance** should be recorded and the **Attend Future Session** check box selected.

   The **Incident Date** defaults to today's date but can be edited.

   Any recorded **Comments** about the incident are displayed.
4. To re-use the comments recorded for a different behaviour incident, click the **Search** button adjacent to the field to display the Find Behaviour Incident dialog (please see *Searching for Existing Behaviour Incidents* on page *357*).
5. Click the **OK** button.

   The **Added By** field is populated with the name of the user who recorded the original detention.

   Enter any **Staff Comments** and click the **OK** button to return to the **Detention Details** page.

Recording the Reason for Detention

- If you are recording a detention from a behaviour incident record by clicking the **Detention** button on either the **Behaviour Incident** page or the **Behaviour Incident Details** page (via **Focus | Behaviour Management | Maintain Behaviour Incidents**), the **Reason for Detention** displays the **Behaviour Type** saved for each pupil/student involved in the incident (please see *Adding/Editing a Behaviour Incident* on page *359*). Here, changes can be made to the **Reason for Detention** without affecting the **Behaviour Type** saved in the behaviour incident record.
- If you are recording a detention on the **Detention Details** page (via **Focus | Behaviour Management | Maintain Detentions**), the **Reason for Detention** displayed in the **Linked Students** panel defaults to **<None>** because the detention is not yet linked to a behaviour incident.

Do not make any changes to the **Reason for Detention** before reading the following important note.

> ***IMPORTANT NOTES*** *for adding a detention via* ***Focus | Behaviour Management | Maintain Detentions****:*
>
> *The method of recording a* ***Reason for Detention*** *is determined by whether an associated behaviour incident has already been recorded.*
>
> *If a behaviour incident has been created for the pupil/students involved in the detention, for each pupil/student click the appropriate* ***Reason for Detention*** *cell then select the reason from the drop-down list. When the record is saved, a behaviour incident is created automatically for each pupil/student and the* ***Reason for Detention*** *populates the* ***Behaviour Type*** *field of the behaviour incident record.*
>
> *If behaviour incidents have already been created for the pupil/students you have added to the detention, involved in the detention, do not select the* ***Reason for Detention*** *from the drop-down list. Instead, you should link the existing behaviour incident to a detention (please see* Linking Existing Behaviour Incidents to a Detention *on page* 416*).*

> *TIP: It is possible to select multiple pupil/students in the* ***Linked Students*** *panel by holding the* ***Ctrl*** *key then clicking each pupil/student, or holding the* ***Shift*** *key to select a block of pupil/student. For example, you can hold the* ***Shift*** *key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's* ***Reason for Detention*** *from the drop-down list and all highlighted pupil/students are assigned the selected* ***Reason for Detention****. This also applies to the* ***Points*** *and* ***Parents/Carers Informed*** *drop-down lists.*

More Information:
Creating Detention Letters on page *419*

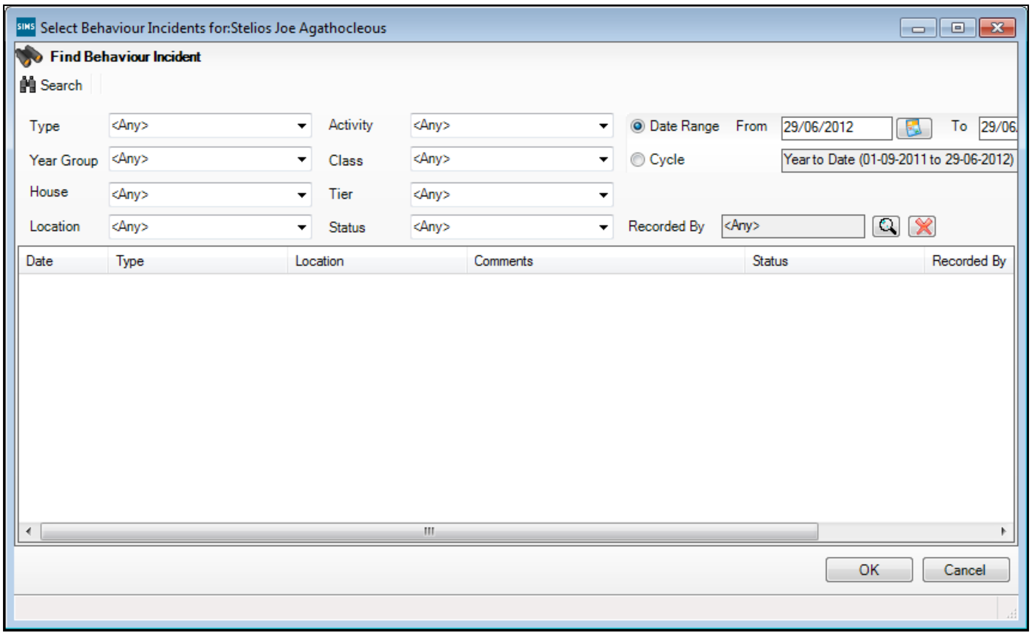
Linking Existing Behaviour Incidents to a Detention

If you add a detention using the **Detention Details** page (via **Focus | Behaviour Management | Maintain Detentions**), and the appropriate behaviour incident(s) have already been recorded separately and the pupil/students have been placed on the detention, the behaviour incidents must be linked to the detention.

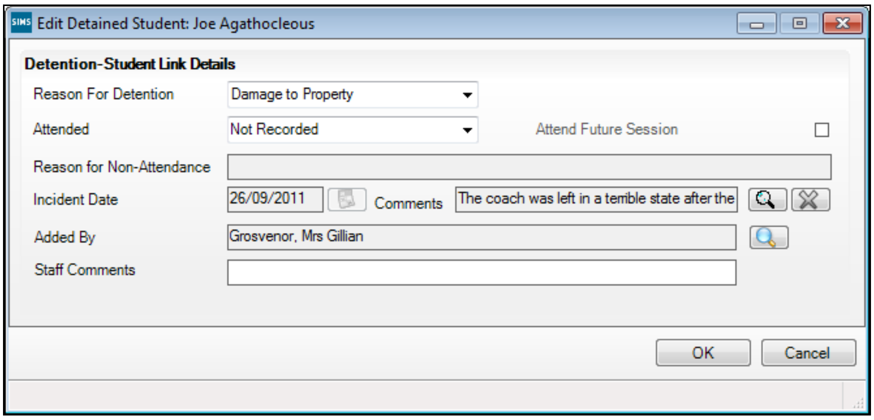
> ***WARNING:*** *If you do not link the behaviour incident to the detention, duplicate behaviour incidents are created when the detention record is saved.*

This section provides information on how to link existing behaviour incidents to a detention, when the behaviour incident and detention have been recorded separately.

1. Search for and select the required detention session (please see *Searching for an Existing Detention* on page *407*).
2. In the **Linked Students** panel, highlight the pupil/student whose detention record you wish to view then click the **Open** button to display the **Edit Detained Student** dialog.
3. Click the **Browse** button adjacent to the **Comments** field to display the **Select Behaviour Incidents** dialog.

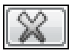


4. Search for and select the required behaviour incident (please see *Searching for Existing Behaviour Incidents* on page *357*).



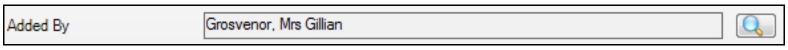
The **Comments** are inherited from the behaviour incident record, as is the **Incident Date**.

5. If a behaviour incident has been linked to a detention in error, click the **Delete** button adjacent to the **Comments** field.

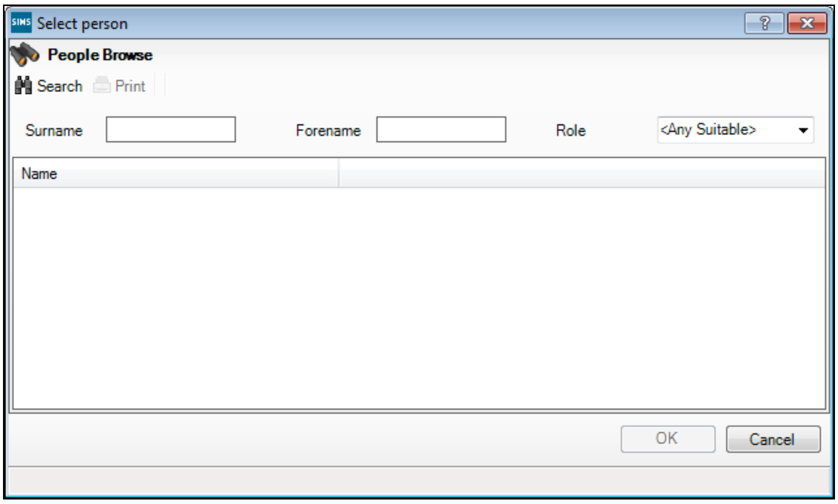


Delete button

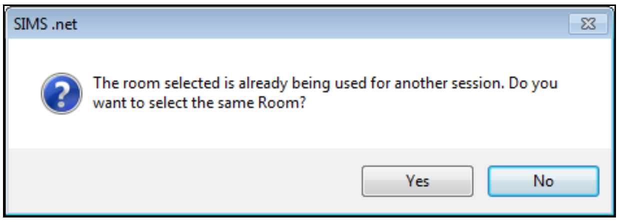
By default, the **Added By** field displays the name of the staff member who is adding the record.



6. To change the member of staff, click the **Browser** button adjacent to the **Added By** field to display the **Select person** browser.



7. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
8. Highlight the required member of staff then click the **OK** button to return to the **Edit Detained Student** dialog.
9. Enter any other additional **Staff Comments**.
10. Click the **OK** button to return to the **Detention Details** page.
11. Repeat steps 2 to 10 for each pupil/student whose detention record you wish to link to a behaviour incident.
12. To send a letter to a pupil/student's parent/guardians, click the **Letter** button in the **Linked Students** panel (please see *Creating Detention Letters* on page *419*). The **Letter** button is enabled only when the detention record has been saved.
13. Click the **Save** button to save the detention details. If you have selected a room that already has a detention session arranged at the same time as the session you are adding, the following message is displayed.



- Click the **Yes** button to confirm that you wish to use the same room and assign the pupil/students to this room.
- Click the **No** button to return to the **Detention Details** page, where you can edit the **Location** and **Save** the record.

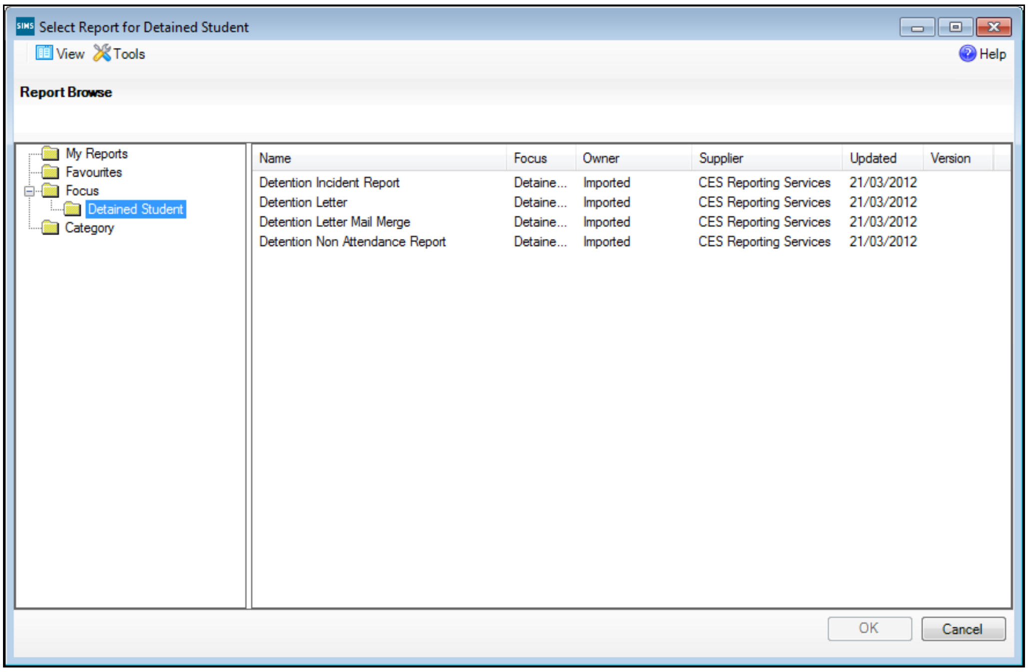
A range of message might be displayed when saving a detention record (please see *Adding/Editing Detentions* on page *409*).

Creating Detention Letters

Once the detention details have been saved, detention letters can be created and sent to the parent/guardians of pupil/students associated with the detention.

*TIP: By generating detention letters from the **Detention Details** page, only one detention letter can be created at a time and this is for the highlighted pupil/student. If you wish to produce a large number of detention letters, you are strongly advised to produce them by running the Detention Letter Mail Merge report outside of the **Detention Details** page (via **Reports | Run Report** then navigate to **Focus | Detained Student** in the **Report** browser). Running the report outside of the **Detention Details** page enables you to produce letters for all pupil/students scheduled to attend a detention session over a specified time period.*

1. Highlight the pupil/student for whom you wish to create a detention letter.
2. Click the **Letter** button in the **Linked Students** panel to display the **Select Report for Detained Student** dialog.



3. Navigate to the **Focus | Detained Student** folder. This folder displays all of the pre-defined detention reports.

4. Highlight the detention letter you wish to produce then click the **OK** button.

23 September 2015

Mr and Mrs A Abraham
122 The Rowans
Milton
Cambridge
Cambridgeshire
CB24 6ZA

Dear Mr and Mrs Abraham,

Jane Abraham Reg Group: 6KH

It is with regret that I am writing to inform you that due to Inadequate Work in Class which took place on 18 November 2015, I intend to keep your child for a period of 30 minutes. This will take place on Wednesday, 18 November 2015 from 12:30 to 13:00 in Headteacher's Office.

Please can you stress the importance to your child of attending this detention and make alternative arrangements for him/her to return home after the session. I would ask for you full co-operation in this matter.

If there is any reason why your child is unable to attend the detention at this time, please could you inform the school at your earliest convenience.

Yours sincerely,

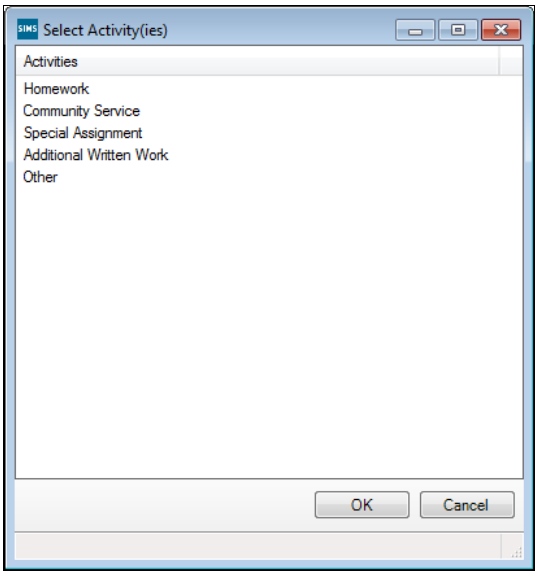
Head Teacher

The content of the detention letter can be edited to incorporate the school's logo, etc. It is also possible to make changes to the text of the letter prior to distribution to parent/guardians.

Linking Activities

Specific activities or tasks, to be completed by the detained pupil/students, can be set up for the detention session. For example, detained pupil/students may be asked to complete a piece of written work.

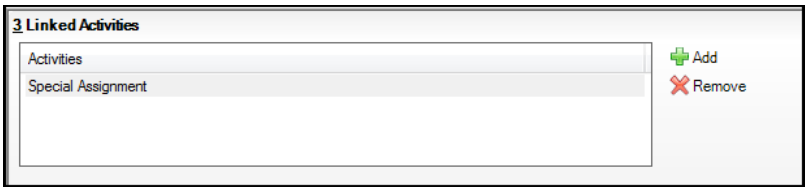
1. Click the **Add** button in the **Linked Activities** panel to display the **Select Activity(ies)** dialog.



The **Detention Activity** lookup determines the list of activities displayed. Additional types of detention activity can be added using Maintain Lookups (via **Tools | Lookups | Maintain**). This functionality enables you to amend the values to those that commonly occur in your school.

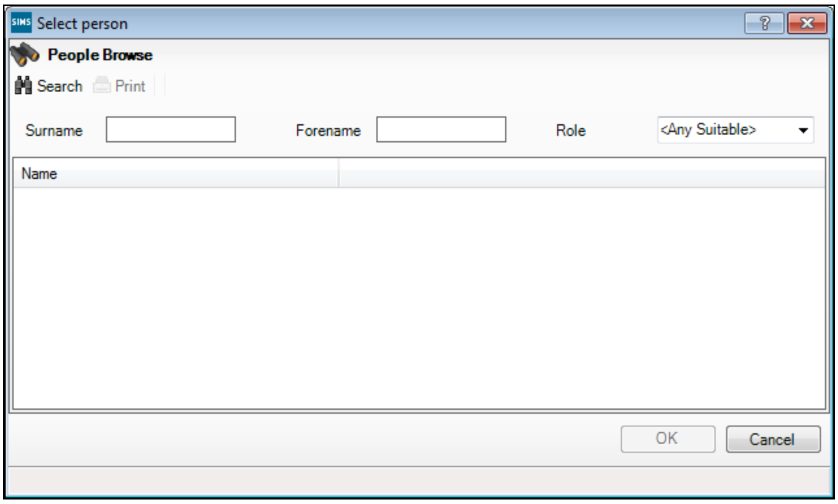
2. Highlight one or more activities then click the **OK** button to associate them with the detention and return to the **Detention Details** page.

   The **Linked Activities** panel is populated with the selected activities.

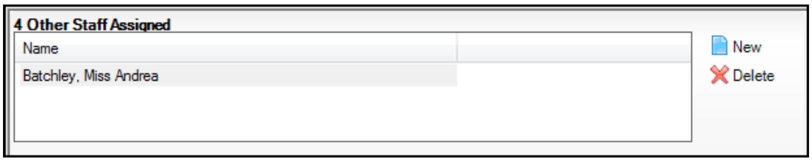


Assigning Additional Staff to a Detention

1. Click the **New** button in the **Other Staff Assigned** panel to display the **Select person** dialog.



2. Enter any required search criteria or leave the fields blank to display all staff then click the **Search** button.
3. Highlight the required member of staff. Multiple members of staff can be selected by holding the **Ctrl** key then clicking each person, or by holding the **Shift** key then clicking to select a block of people.
4. Click the **OK** button to return to the **Detention Details** page, where the selected member(s) of staff are displayed.



5. Click the **Save** button.

   A range of messages might be displayed when saving a detention record (please see *Adding/Editing Detentions* on page *409*).

Recording Notes/Documents

If the pupil/students completed a special assignment or additional written work during the detention, a copy of their work can be attached to the detention details.

1. Click the **New** button in the **Notes/Documents** panel to display the **Add/Note Document** dialog.
2. Add the note or document, as required (please see *Attaching a New Note/Document* on page *147*).
3. Click the **Save** button.

   A range of messages might be displayed when saving a detention record (please see *Adding/Editing Detentions* on page *409*).

Recording Detention Attendance

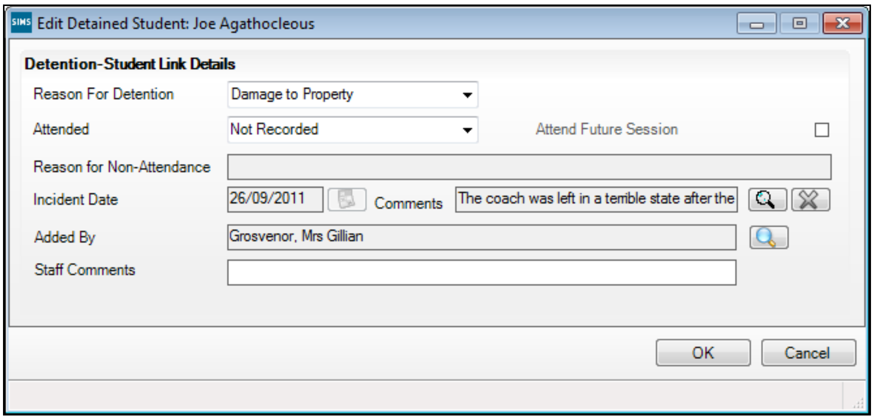
Once a pupil/student has been linked to a detention, their individual detention record can be viewed and edited from the **Detention Details** page. Once the detention has taken place, a pupil/student's detention attendance can be recorded. It is also possible to assign to an alternative detention session for any pupil/student(s) who did not attend the scheduled session.

> *NOTE: It is possible to record a pupil/student's attendance at a detention session only when the detention **End Time** has elapsed.*

1. Search for and select the required detention session (please see *Searching for an Existing Detention* on page *407*).
2. From the **Linked Students** panel, click into the **Attended** column adjacent to each pupil/student name and select the appropriate option from the drop-down list.

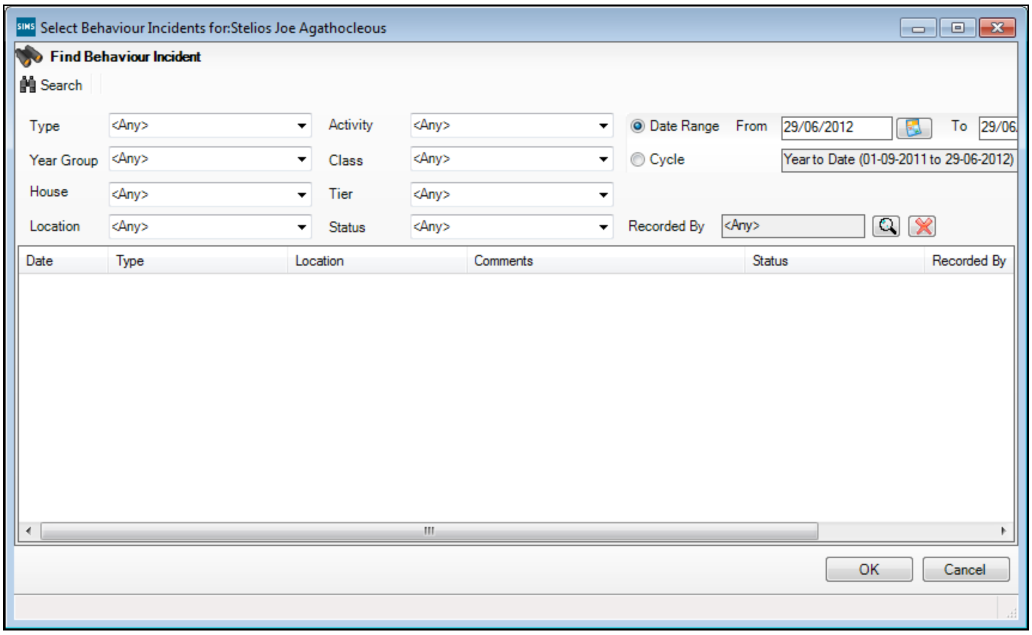
> *TIP: It is possible to select multiple pupil/students in the **Linked Students** panel by holding the **Ctrl** key then clicking each pupil/student, or by holding the **Shift** key to select a block of pupil/students. For example, you can hold the **Shift** key, click the first pupil/student in the list then click the last pupil/student. You can then select the last pupil/student's **Attended** status from the drop-down list and all highlighted pupil/students are given the selected **Attended** status. This also applies to the **Staff Name** and **Reason for Detention** drop-down lists.*

3. If a pupil/student has not attended the detention, highlight their name in the **Linked Students** panel then click the **Open** button to display the **Edit Detained Student** dialog.

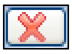


4. Complete all of the required information if it has not already been recorded.
5. A pupil/student's attendance at the detention can be recorded by selecting from the **Attended** drop-down list. Selecting **Not Attended** from the drop-down list enables you to enter a **Reason for Non-Attendance**.
6. If a pupil/student fails to attend the detention, enter the **Reason for Non-Attendance**, e.g. `Illness`.
7. To set up a future detention session for this pupil/student, select the **Attend Future Session** check box. This check box is available only if the **Attended** status is set to **Not Attended**.
8. The **Incident Date** defaults to today's date but can be changed by entering the date or by clicking the **Calendar** button then selecting a date.

9. If you wish to link an existing behaviour incident to the selected pupil/student's detention record (or amend the existing behaviour incident link), click the **Browser** button adjacent to the **Comments** field to display the **Select Behaviour Incidents** dialog.



10. Enter or select any required search criteria or leave the fields blank to display all behaviour incidents for the selected pupil/student then click the **Search** button.
11. Highlight the required behaviour incident then click the **OK** button to return to the **Edit Detained Student** dialog, where the details of the behaviour incident are displayed in the **Comments** field.
12. If you link a behaviour incident in error, click the **Delete** button to remove the incident and the **Incident Date**.

 *Delete button*

13. By default, the **Added By** field displays the name of the staff member who is adding the record. To change the name of the staff member adding the record, click the **Browser** button adjacent to the **Added By** field then search for and select the required person using the **Select person** browser.
14. Enter any **Comments** about the detention.
15. Click the **OK** button.
    - If the **Attend Future Session** check box has been selected, the **Add Detention Details for** dialog is displayed, enabling you to search for an existing detention, or add a new detention for the pupil/student to attend (please see *Adding/Editing Detentions* on page *409*).
    - If the **Attend Future Session** check box has not been selected, the **Detention Details** page is displayed, where the new details are displayed in the **Linked Students** panel.
16. Click the **Save** button to save the details of the detention.

17. Create and distribute detention letters, if required (please see *Creating Detention Letters* on page *419*).

Deleting a Detention Session

Class teachers can delete only detention sessions that they have set up themselves.

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** browser.
2. Search for the detention (please see *Searching for an Existing Detention* on page *407*) you wish to delete then click the **Delete** button.
3. Confirm the deletion by clicking the **Yes** button.

16| Creating Report Cards

Introduction

As a means of promoting positive behaviour amongst pupil/students, children who misbehave persistently can be assigned performance targets that they must meet. Their behaviour in relation to these targets can be monitored over a specified period of time using a *report card*.

You may ask pupil/students to bring their report card to each lesson so that at the end of the lesson, class teachers can provide a brief comment or allocate points to indicate how the pupil/student has progressed towards the target(s) set. While on report, a pupil/student must adhere to all targets.

The majority of report cards are issued by Heads of Year or Pastoral Managers but generally speaking, class teachers are responsible for the administration and completion of report cards.

Report cards can be set up and maintained via the following menu routes:

- **Focus | Behaviour Management | Report Card**
- **Focus | Behaviour Management | Maintain Behaviour Incidents** (via the **Students Involved** panel)
- **Focus | Attendance** (or **Lesson Monitor**) **| Take Register**
- Many of the pupil/student routes, including the **Student Behaviour** routes (accessed by clicking the **Behaviour Management** link in the **Links** panel).

The information on the page displayed, together with the method of adding a report card, are the same regardless of the menu route used. This chapter discusses the process of creating a report card record via **Focus | Behaviour Management | Report Card**.

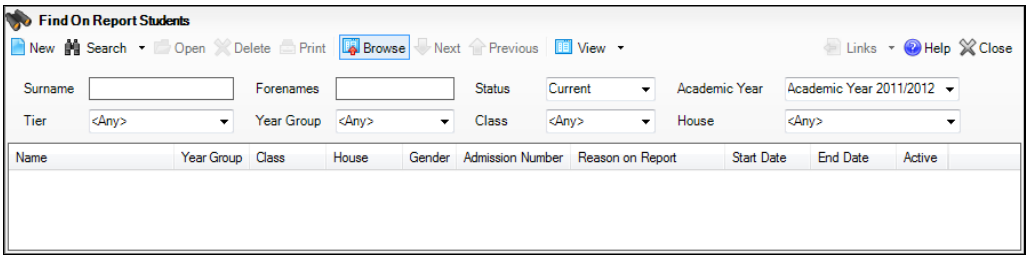
When a student is issued with a report card, this is indicated on the **Take Register** page (via **Focus | Attendance** (or **Lesson Monitor**) **| Take Register**) by the appearance of a ® symbol in the pupil/student's **Name** field and their row is displayed in red text.

A report card report can be produced to display report card details for one or more pupil/students over a specified date range.

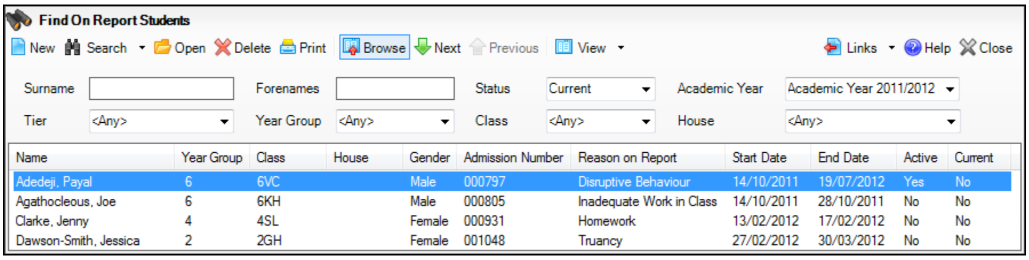
Searching for an Existing Report Card

Before recording the details of a report card, you are strongly advised to check that it has not already been recorded. It is possible to apply a range of filters, enabling you to search for specific report cards. Alternatively, you can view a report card from the pupil/student record (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).

1. Select **Focus | Behaviour Management | Report Card** to display the **Find On Report Students** browser.



2. Enter the required pupil/student's **Surname** and **Forenames**, if required.
3. Select an item from one or more of the following drop-down lists to filter the list of report cards: **Status** (e.g. **Current**, return all pupil/students currently on report), **Academic Year**, **Tier**, **Year Group**, **Class** and **House**. Users in Secondary schools can search by **Reg Group** instead of **Class**.
4. Click the **Search** button to display the search results. Alternatively, leave the filters blank to display all report cards.



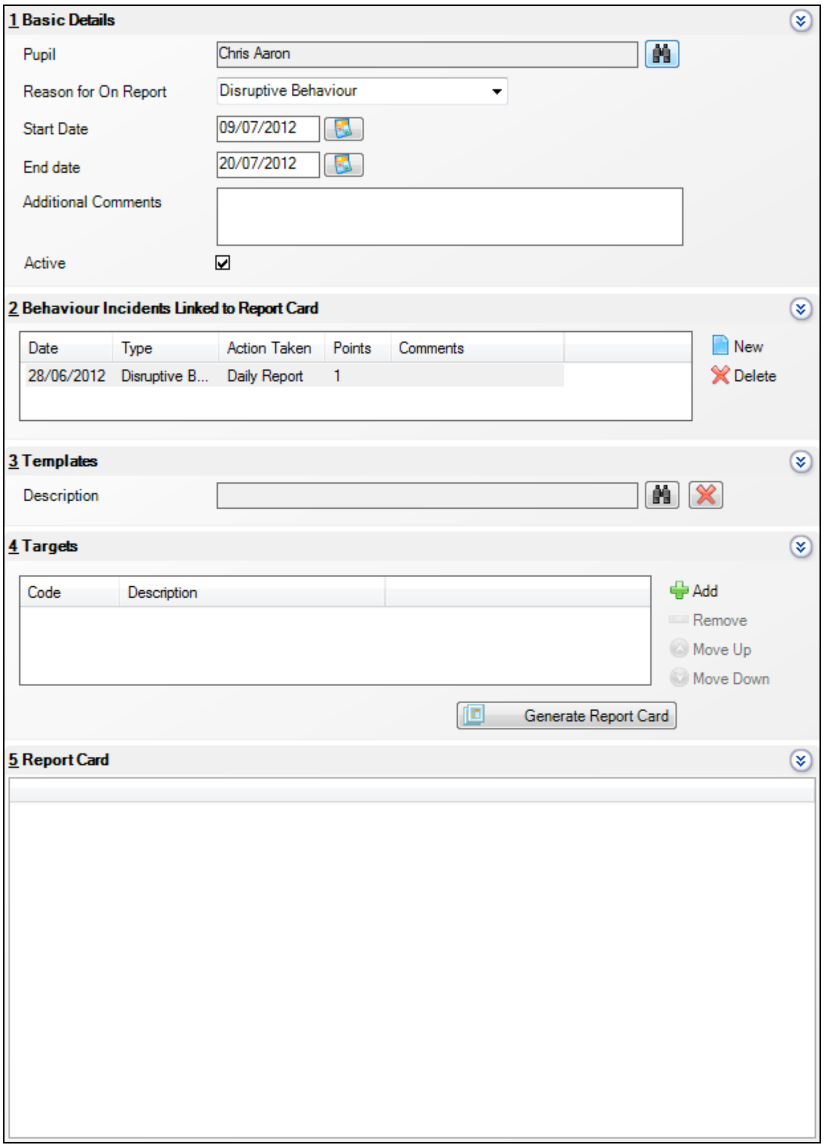
A summary of each report card is displayed in the results area, including the **Name** of the pupil/student on report, the reason for them being on report (**Reason on Report**) and the **End date** of the on report period. The search results are displayed in **Name** order.

5. Highlight the report card you wish to view or edit then click the **Open** button to display its details on the **Report Card Details** page. If you cannot find the required record, click the **New** button to display the **New Report Card Details** page.

> *NOTE: It is also possible to view a report card from a pupil/student's record (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**). Click the **Behaviour Management** link in the **Links** panel to display the **Behaviour Management** page. From here, you can view all report cards linked to this pupil/student by navigating to the **Report Card** panel.*

Creating a Report Card Record

1. Select **Focus | Behaviour Management | Report Card** to display the **Find On Report Students** browser.
2. Search for an existing report card (please see *Searching for an Existing Report Card* on page *428*) then click the **Open** button to edit its details on the **Report Card Details** page or click the **New** button to display the **New Report Card Details** page.



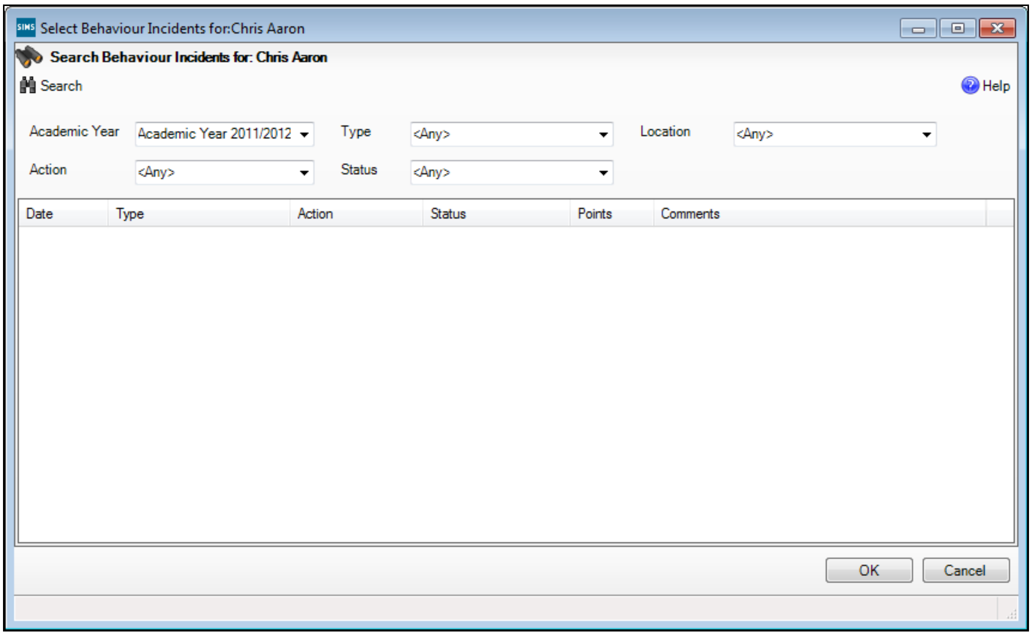
3. When recording the details of a new report card, search for the required pupil/student by clicking the **Browser** button adjacent to the **Pupil** (or **Student**) field in the **Basic Details** panel to display the **Select Pupil (or Student)** dialog (please see *Searching for an Existing Pupil/Student* on page *168*). If you change the associated pupil/student before saving the record, you are warned that the existing report card details will be cleared. Click the **Yes** button to continue.

   The **Pupil (or Student)** field cannot be edited in a saved record.

4. Select the **Reason for On Report** from the drop-down list, e.g. **Disruptive Behaviour**.
5. Select the **Start Date** and **End date** for the report card by clicking the **Calendar** buttons then selecting the required dates.
6. Enter any **Additional Comments** relating to the report card.
7. The report card is marked as **Active** by default. To mark the report card for future use, deselect the check box.

Linking a Behaviour Incident to the Report Card

1. Click the **New** button in the **Behaviour Incidents Linked to Report Card** panel to display the **Select Behaviour Incidents for** dialog.

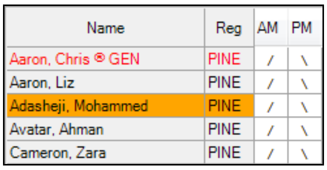


2. Select the **Academic Year**, **Type**, **Location**, **Action** and **Status** of the required behaviour incident from the drop-down lists then click the **Search** button to display all the behaviour incidents that match the search criteria entered.
3. Highlight the required behaviour incident then click the **OK** button to return to the **Report Card Details** page, where the selected behaviour incident is displayed in the **Behaviour Incidents Linked to Report Card** panel.

Applying a Report Card Template

A report card template enables the selection of a set of targets that a pupil/student is required to achieve over the course of the report card period, and enables you to select the columns to include on the report. Once defined, the re-usable report card template can be applied to a report card record so that the record inherits the pre-defined attributes of the template. Using a template reduces the need to repeatedly create report cards with similar structures. Once a template is applied to a report card record, the individual targets applied can be added to or removed.

When a pupil/student is issued with a report card, this is indicated on the **Take Register** page (via **Focus | Attendance** (or **Lesson Monitor**) **| Take Register**) by the appearance of a ® symbol in the pupil/student's **Name** field and their row is displayed in red text. If a report card template has been applied to the report card, the template **Code** is also appended to the **Name** field.



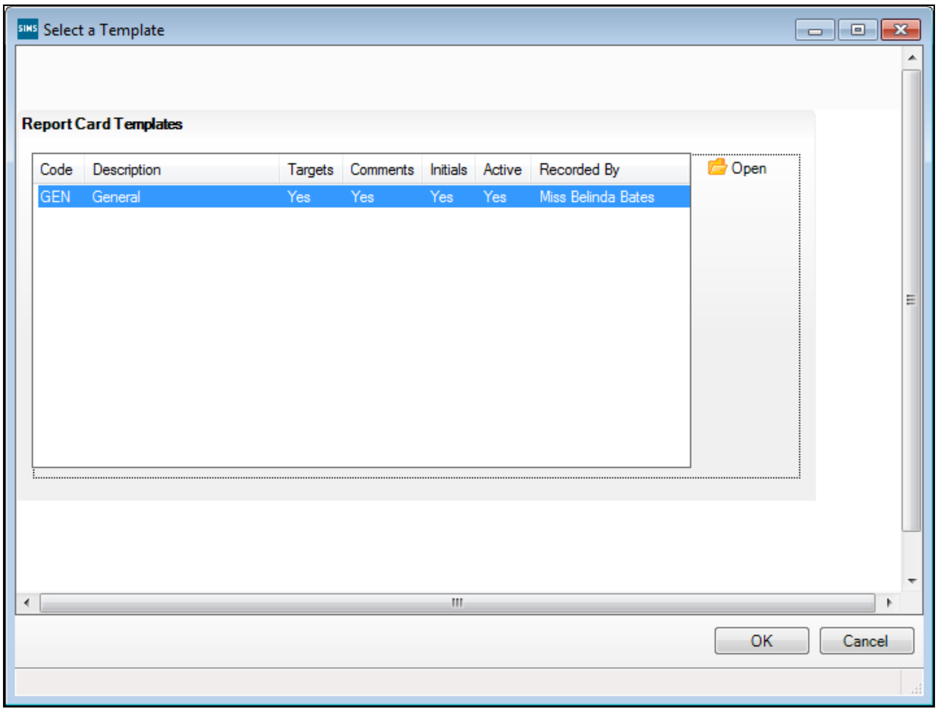
Additional Resources:

Setting Up Report Card Templates in the *Setting Up Behaviour Management* chapter of the *Setting Up and Administering SIMS* handbook

If you wish to use the standard format for report cards without using a report card template, please proceed to the next section (please see *Adding Targets to the Report Card* on page *433*).

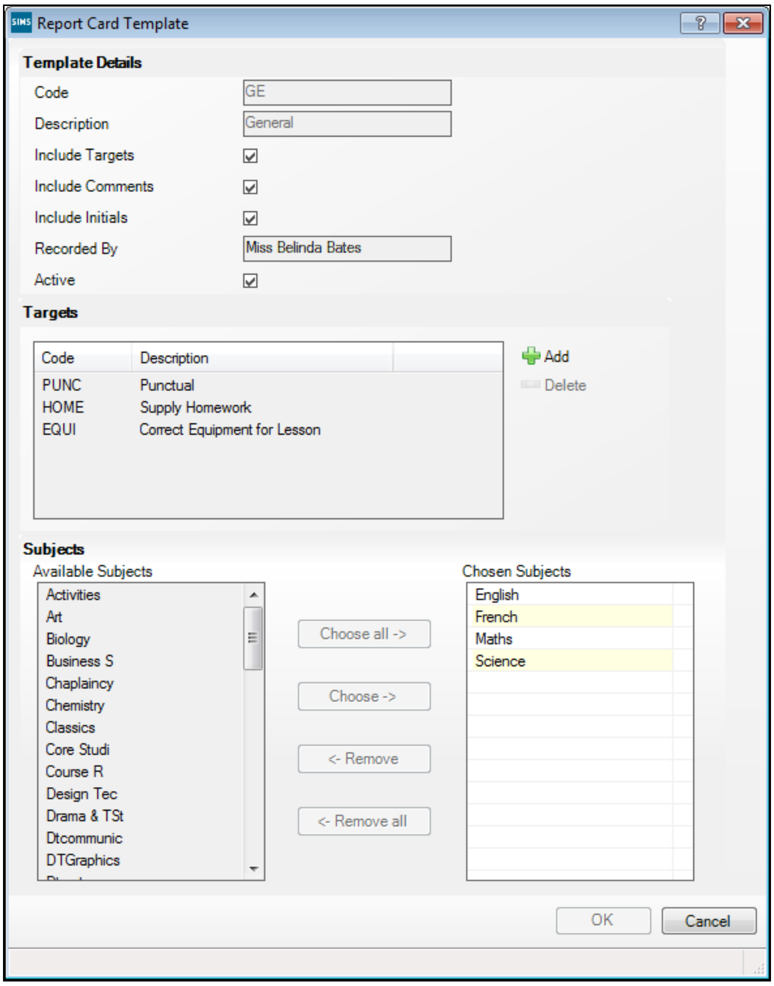
If you wish to apply a report card template:

1. Click the **Browser** button to display the **Select a Template** dialog.



2. To ensure that the correct template is selected, its details can be viewed in read-only mode by highlighting it then clicking the **Open** button to display the **Report Card Template** dialog.

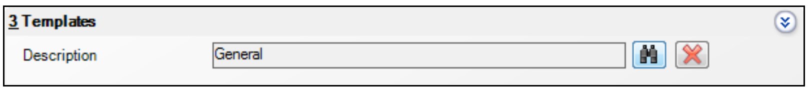
NOTE: Only active report card templates are available for selection.



NOTES: Subjects are displayed on a report card only if you are licensed to use Lesson Monitor.

When a report card template is applied to a report card, the generated report card displays a line for each day on which a class associated with a selected subject is scheduled to take place.

3. Click the **Cancel** button to return to the **Select a Template** dialog.
4. Highlight the template you wish to apply to the report card then click the **OK** button to return to the **New Report Card Details** page, where the **Description** of the selected template is displayed in the **Templates** panel.



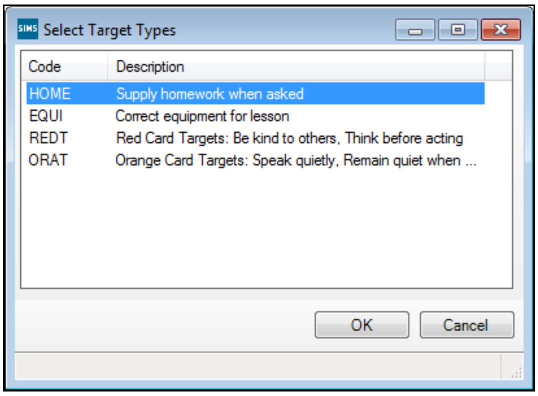
> *NOTE: If the **Description** is appended with **- (Inactive)**, this indicates that the selected report card template is no longer active. This is most likely to occur when viewing historical report card records.*

5. If you wish to remove a template from the report card record, click the **Delete** button in the **Templates** panel.

Adding Targets to the Report Card

Targets can be applied to a report card manually or as part of a report card template. If you have applied a report card template, the individual targets applied as part of the process can be added to or removed.

1. Click the **Add** button in the **Targets** panel to display the **Select Target Types** dialog.



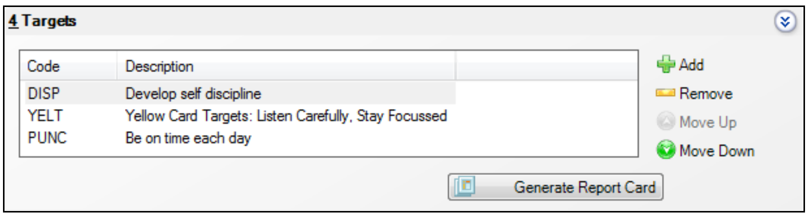
The targets available for selection are maintained using the **Maintain Lookups** page (accessed via **Tools | Maintain Lookups**).

2. Highlight the required target type(s) then click the **OK** button to return to the **Report Card Details** page.
3. If more than one target has been assigned to the pupil/student, the order in which they are displayed on the report card can be changed by highlighting the required target then clicking the **Move Up** and **Move Down** buttons.
4. An unwanted target can be removed by highlighting it then clicking the **Remove** button.

More Information:
Applying a Report Card Template on page *430*

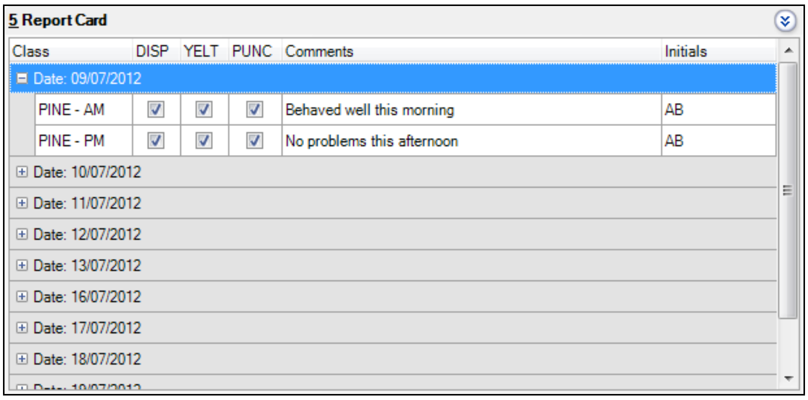
Generating and Printing the Report Card

1. Click the **Generate Report Card** button in the **Targets** panel to populate the **Report Card** panel.



The **Report Card** panel displays the following details for each day of the report card duration:

- their **Class** or **Reg Group**.
- one or more columns indicating the reason(s) for the issuing of the report card, e.g. **DISP** for Discipline, **PUNC** for Punctuality, etc.
- space for any teacher **Comments** in relation to their behaviour in the class or registration group.
- a column for the teacher's **Initials**.



2. Click the **Print** button at the top of the **Report Card Details** page to print a paper copy of the report card (please see *Selecting the Layout and Output Options for a Report* on page *436*). This can be given to the pupil/student, who must produce the report card for completion by each teacher as they move from class to class throughout the school day.

Report Card for Chris Aaron

Name	Chris Aaron	**Reg**	PINE
Start Date	09/07/2012	**End Date**	20/07/2012
Reason	Disruptive Behaviour		

Targets

Code	Description
DISP	Develop self discipline
YELT	Yellow Card Targets: Listen Carefully, Stay Focussed
PUNC	Be on time each day

Report Card Progress

Date: 20/07/2012

Class	DISP	YELT	PUNC	Comments	Initials
PINE - AM	√	√	√	Behaved well this morning.	AB
PINE - PM	√	√	√	No problems this afternoon.	AB

Date: 19/07/2012

Class	DISP	YELT	PUNC	Comments	Initials
PINE - AM	√	√	√	Well behaved.	AB
PINE - PM	√	√	√	Paid attention well, got involved in activities.	AB

Date: 18/07/2012

Class	DISP	YELT	PUNC	Comments	Initials
PINE - AM	√	√	√	Arrived early, well behaved.	AB
PINE - PM	√	√	√	Paid attention all afternoon.	AB

NOTE: As long as the report card is current and active, all the details can be edited or amended with the exception of the ***Start Date*** *for a report card that has already started.*

Re-activating a Report Card

If a report card has reached its **End Date**, it becomes inactive and can no longer be edited. This applies also when its **Active** check box in the **Basic Details** panel is deselected.

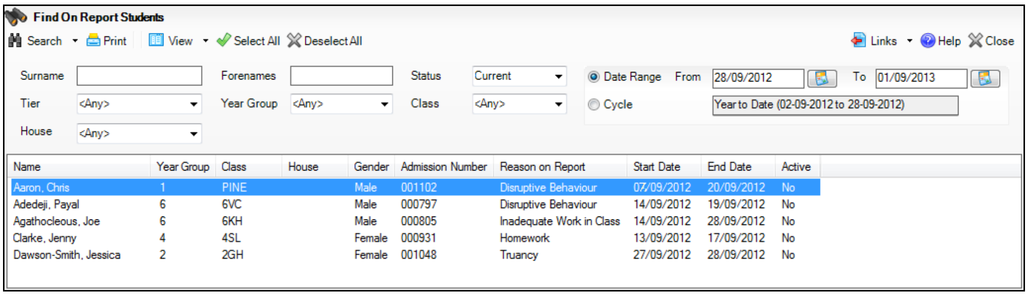
It is possible to re-activate an inactive report card if, for example, you wish to extend the duration of a report card.

1. Select **Focus | Behaviour Management | Report Card** then search for and select the required report card to display the **Report Card Details** page.
2. In the **Basic Details** panel, select the **Active** check box.
3. Click the **Save** button.
4. Enter a new **End date**, add any other details then click the **Save** button.

Producing the Report Card Report

The Report Card report displays the report card details of one or more pupil/students over a specified date range, e.g. the previous term, week to date, etc.

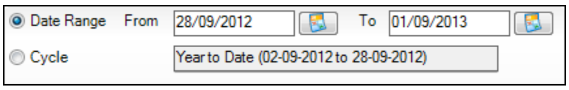
1. Select **Reports | Behaviour Management | Report Card** to display the **Find On Report Students** browser.



2. Enter all or part of the pupil/student's **Surname** and/or **Forename**, if required.
3. Select values from the drop-down lists to further restrict the search criteria.

   By default, only pupil/students who are on report on the current date are listed. This can be changed using either of the following methods:

   - To specify a custom date range, select the **Date Range** radio button then select **From** and **To** dates by clicking the respective **Calendar** buttons then selecting the required dates. The dates default **From** today **To** the last day of the current academic year.



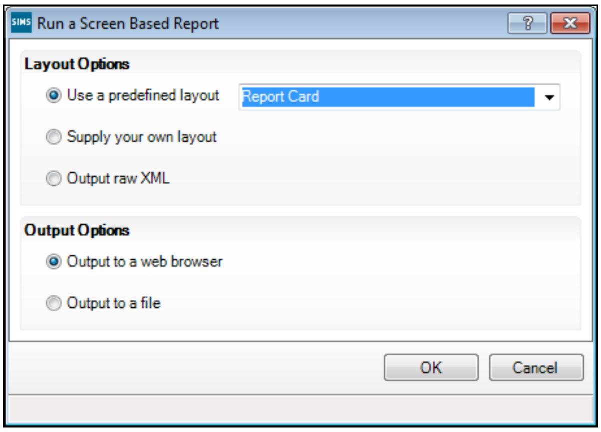
- To choose a pre-defined date range based on the current academic year calendar, select the **Cycle** radio button then select an option from the adjacent drop-down list, e.g. **Year to Date (02-09-2012 to 28-09-2012)**. The dates default from the first day of the current academic year to today's date.

4. Click the **Search** button to display all the pupil/students who match the specified search criteria.
5. Click the **Print** button to display the **Run a Screen Based Report** dialog.

Selecting the Layout and Output Options for a Report

When running a report, you can define its look and feel and how it is output.

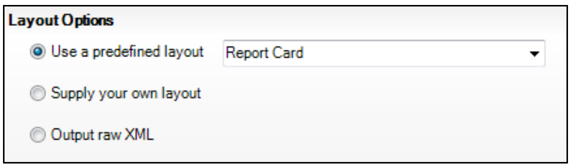
Once the appropriate options have been selected, click the **OK** button to produce the report in the selected format (HTM, HTML, XML or your web browser).



Selecting Layout Options

To select the layout of the report, select the appropriate radio button then complete any additional fields.

- To produce the report in its standard format, select the **Use a predefined layout** radio button. The default layout name matches that of the report.



- If you wish to produce the report using your own report design, select the **Supply your own layout** radio button.

You will be invited to select an existing style sheet template by clicking the **Browse** button to display the **Select a layout file** dialog. Navigate to the location of the appropriate `.XSL` or `.XSLT` file, highlight it then click the **Open** button to return to the **Run a Screen Based Report** dialog.

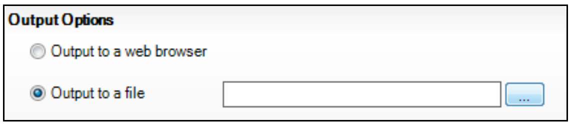
Browse button

- If you want to output the content of the report as raw XML, select the **Output raw XML** radio button.

Selecting Output Options

- To display the report in your default web browser, select the **Output to a web browser** radio button and click the **OK** button.

- To save the report output to disk, select the **Output to a file** radio button then click the **Browse** button to display the **Save As** dialog.



Navigate to the folder where you want to save the report, enter a filename, select the type of output file (`.HTM`, `.HTML` or `.XML`) then click the **Save** button to return to the **Run a Screen Based Report** dialog.

Click the **OK** button to save the file.

17| Recording Exclusions

Overview of Exclusions

Excluding a pupil/student from school is usually considered only when all other reasonable alternative actions have been explored, without success. The decision to exclude a particular pupil/student can be made if they have committed a serious breach of the school's behaviour policy and if, by remaining in school, they would seriously impair the education or welfare of others.

A DfE document called *Exclusion from Maintained schools, Academies and Pupil Referral Units in England (*http://www.gov.uk/government/publications/school-exclusion*)* is available for further information.

There are some exceptional circumstances where pupil/students can be excluded for a first or one-off offence, including:

- serious actual or threatened violence against another pupil/student or member of staff
- sexual abuse or assault
- supplying illegal drugs
- carrying an offensive weapon.

A school is within its right to report the situation to the police if a criminal offence has taken place. It may also be considered appropriate to notify Social Workers or Educational Psychologists. The decision to exclude a pupil/student can be made only by the Head Teacher or the acting Head. Exclusions cannot be open-ended; they must be for a fixed period or as a permanent measure.

Permanent exclusions and any fixed period exclusions of longer than five school days (singly or cumulatively) must be reported to the school governors and to the LA. If an exclusion will result in the pupil/student missing a public examination, this must also be reported to the school governors and to the LA. All other exclusions should be reported termly to the school governors and to the LA. Recording exclusions is particularly important for the School Census returns and therefore it is important to keep this data up-to-date.

Exclusions that have been overturned by the governing body are not counted in national statistics. However, from the 2019/20 academic year, information regarding exclusion reviews (Governor Reviews and Independent Reviews (IRP)) are reported via the School Census, in the case of permanent exclusions only. The first collection of this data will take place in the Spring 2020 School Census.

Schools must ensure that the final exclusion result and the outcome of the exclusion reviews are maintained so that the final outcome of review results can be recorded and reported.

NOTE: If a pupil/student will be excluded from school for a period of 15 or more consecutive days, the Head Teacher must organise the creation of an Individual Education Plan for the pupil/student on their return to school.

It is possible to record exclusions via the following routes:

- **Focus | Pupil** (or **Student**) **| Exclusions**
- **Focus | Behaviour Management | Maintain Behaviour Incidents** (via the **Students Involved** panel)
- Any of the **Student Behaviour** routes, accessed by clicking the **Behaviour Management** link on the **Links** panel when editing a pupil/student's details.

The page displayed and the methods of recording an exclusion are the same regardless of the menu route used. This chapter describes the process of creating an exclusion record via **Focus | Pupil** (or **Student**) **| Exclusions**.

NOTE: Lunchtime exclusions are no longer recorded in the School Census.

Excluding Pupil/Students with Special Educational Needs

The Special Educational Needs Code of Practice outlines statutory guidance for identifying, assessing and making provision for pupil/students with Special Educational Needs.

Schools should avoid excluding pupil/students with Education, Health and Care plans or Statements of SEN.

Note on Permanent Exclusions

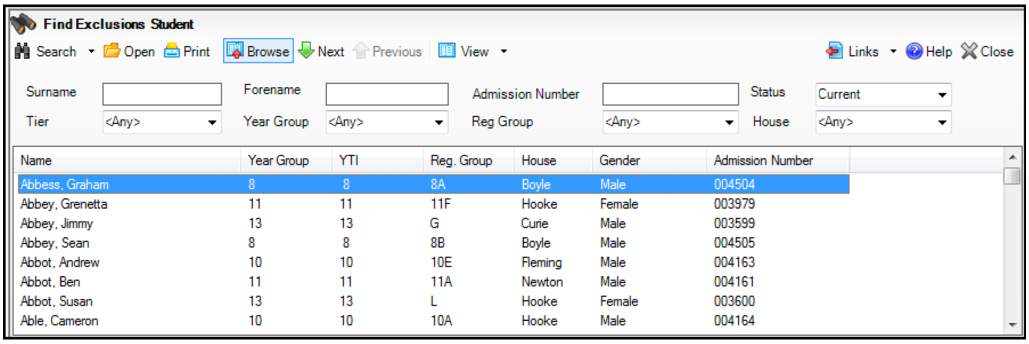
If a pupil/student has been excluded permanently, once any appeal process (Independent Review Panel) has been completed and you know that they will not be returning to your school, you should record them as a leaver.

To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, ensure that the following information has been recorded before recording them as a leaver:

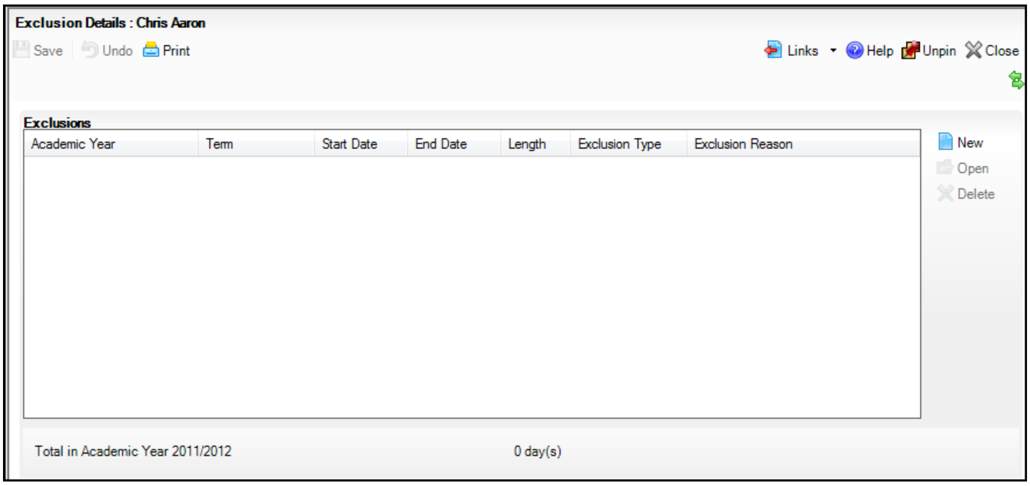
- In Care Indicator
- SEN Provision
- Ethnicity
- Ethnic Source
- Part-time Indicator
- Date of Arrival
- Date of Leaving.

Recording an Exclusion

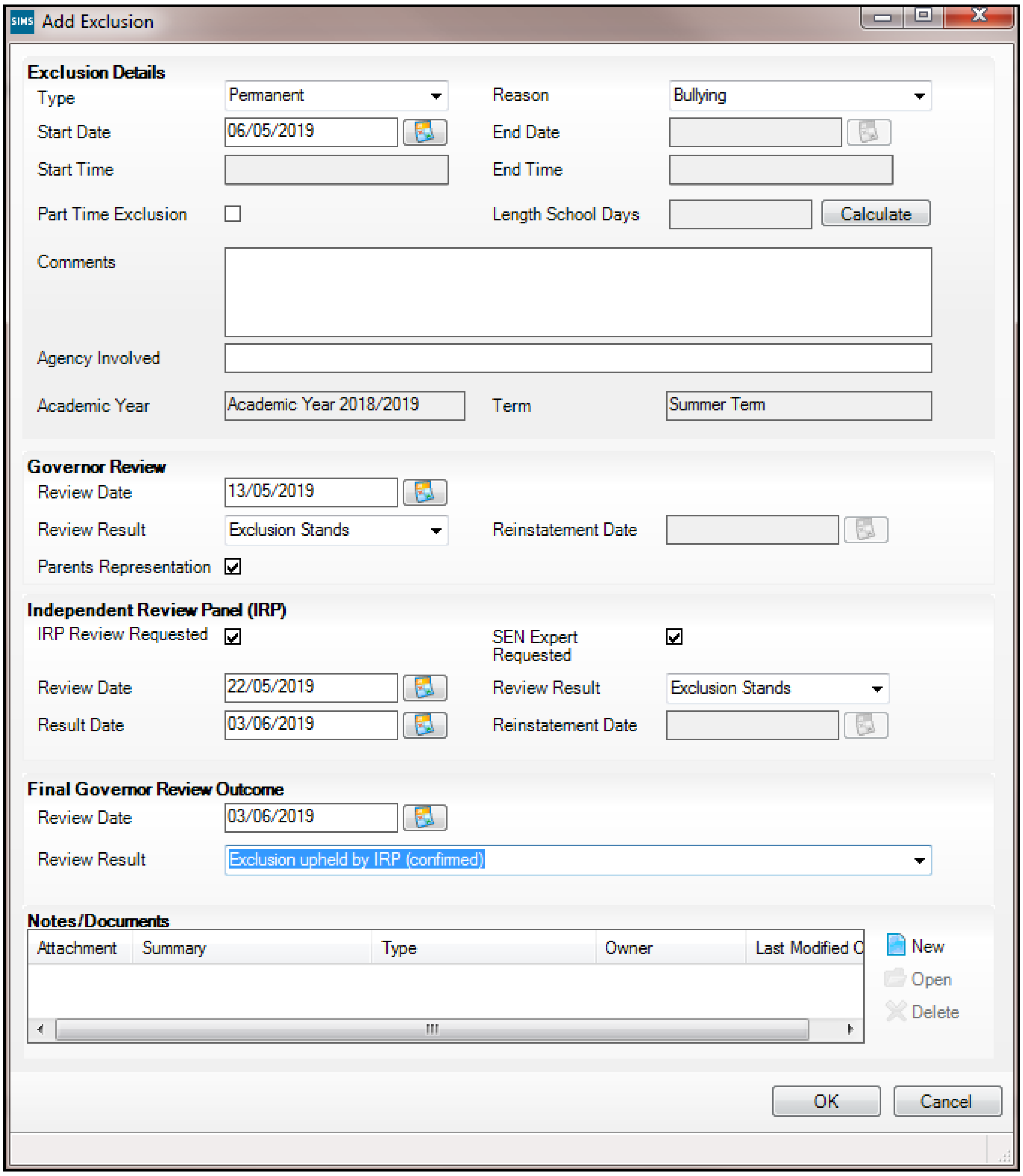
1. Select **Focus | Pupil** (or **Student**) **| Exclusions** to display the **Find Exclusions Student** browser.



2. Search for and highlight the required pupil/student (please see *Searching for an Existing Pupil/Student* on page *168*).
3. Click the **Open** button to display the **Exclusion Details** page. Any previously recorded exclusions for the selected pupil/student are displayed.



4. Click the **New** button in the **Exclusions** panel to display the **Add Exclusion** dialog or highlight an existing exclusion record then click the **Open** button to display the **Edit Exclusions** dialog.



5. Select the exclusion **Type** (e.g. **Fixed Term**) and the **Reason** for the exclusion (e.g. **Physical assault against a pupil**) from the drop-down lists.

> *NOTE: Pupil/students who are considered to be disruptive at lunchtime can be excluded from school premises for the duration of the lunchtime period. This constitutes a fixed term exclusion, equivalent to one half of a school day. Select **Lunchtime** as the **Type**, **AM** as the **Start Time** and the same date in the **Start Date** and **End Date** fields.*

6. Enter the exclusion **Start Date** (the date on which the pupil/student was asked to leave the school by the Head Teacher) and the **End Date** (if the exclusion is for a fixed term). Alternatively, click the appropriate **Calendar** buttons then select the required dates.

 *Calendar button*

> *NOTE: If a pupil/student will be excluded from school for a period of 15 or more consecutive days, the Head teacher must organise the creation of an Individual Education Plan for the pupil/student on their return to school.*

Schools in Wales can enter exclusions in multiples of 0.25 days by selecting the **Part Time Exclusion** check box. The **Start Date** and **End Dates** must reflect the exclusion length accurately. For example, a pupil/student may be excluded for 0.75 days and this may represent lunchtime exclusions over a period of three days, so the **End Date** must be recorded as three days after the **Start Date**. To enter a 0.25 lunchtime exclusion, manually edit the 0.50 figure that first appears in the **Length School Days** field when the **Calculate** button is clicked (ensure that the **Part Time Exclusion** check box is selected).

7. Select the **Start Time** of the exclusion (either **AM** or **PM**) from the drop-down list. Click the **Calculate** button to populate the **Length School Days**.

> *NOTE: If the pupil/student is excluded after morning registration, the exclusion does not take effect until the afternoon. For half-day exclusions therefore, select **AM** with the same **Start Date** and **End Date**. If the pupil/student is excluded in the afternoon, select **PM** with a **Start Date** and **End Date** of the following day. The exclusion does not take effect until the following school day.*

8. Enter any relevant **Comments** relating to the incident and record details of any external **Agency Involved** if appropriate, e.g. Social Services, Police, etc.

The **Academic Year** and **Term** fields are populated automatically when the **Calculate** button is clicked.

Entering Details of the Governor Review

The DfE requires every school's governing body to set up a Governor Review committee that consists of three to five school governors.

This committee is responsible for considering any pupil/student exclusions, and for making a ruling on the validity and period of the exclusions that have been dispensed. The committee has the power to overturn a permanent exclusion and to reinstate a previously excluded pupil/student, particularly if their exclusion is for a period of more than five days or it results in them missing an external examination.

The parent/guardians of the excluded pupil/student can make representation to the Governor Review committee about:

- a fixed period of exclusion of more than five school days.
- a pupil/student's permanent exclusion from the school.

The Governor Review committee must hold a formal hearing about any permanent exclusion within 15 school days, even if representation has not been made by the pupil/student's parent/guardians. Once the formal hearing has been held, a member of the committee must inform both the school and the excluded pupil/student's parent/guardians of the outcome, giving reasons for the committee's decision. If a permanent exclusion has been upheld by the committee, the excluded pupil/student's parent/guardians must be informed and advised that they can make an appeal to an Independent Review Panel (IRP).

1. In the **Governor Review** panel, enter the date in the **Review Date** or click the **Calendar** button then select the required date.

   - Select the outcome from the **Review Result** drop-down list.
   - If it is a fixed term exclusion, change the **Type** in the **Exclusion Details** panel to **Reinstated from Fixed period**.
   - If it is a permanent exclusion, change the **Type** in the **Exclusion Details** panel to **Reinstated from Permanent** and complete the **Final Governor Review Outcome** panel. The **Review Result** should be set to **Exclusion upheld by initial governor review (confirmed)**.
2. If the excluded pupil/student's parent/guardians have made representation to the governors to decide on the ruling of the exclusion, select the **Parents Representation** check box.
3. Record a **Reinstatement Date** only if **Reinstatement** is selected from the **Review Result** drop-down list.

Completing the Independent Review Panel (IRP)

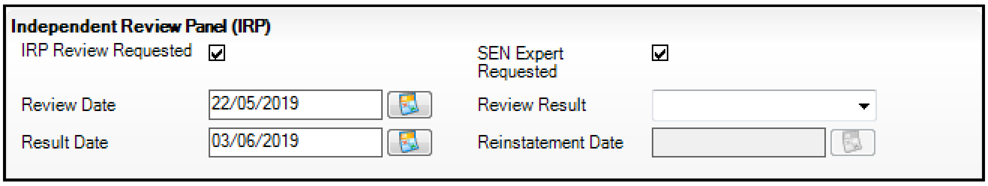
If a permanent exclusion has been upheld by the Governor Review committee, the excluded pupil/student's parent/guardians must be informed and advised that they can make an appeal to an Independent Review Panel. An Independent Review Panel should be scheduled only for permanent exclusions.

The Local Authority or the Academy Trust must arrange, at their own expense, for an Independent Review Panel to review the decision of the governing board not to reinstate a permanently excluded pupil.

It is possible to schedule an Independent Review Panel only if the initial Governor Review has upheld the original exclusion and the **Review Result** is set to **Exclusion Stands**.

1. In the **Independent Review Panel (IRP)** panel, select the **IRP Review Requested** check box.
2. Select the **SEN Expert Requested** check box, if applicable. If requested by the parent/guardians with their application for an Independent Review Panel, the Local Authority/Academy Trust <u>must</u> appoint a SEN Expert to attend the panel. The associated costs of this appointment are the responsibility of the LA/Academy Trust.

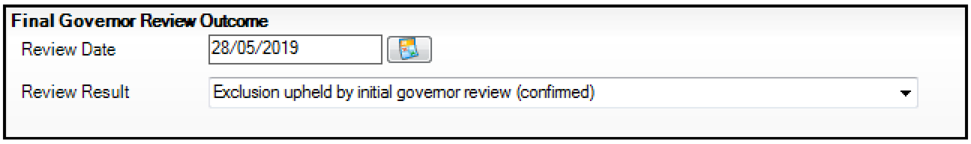
Parent/guardians have the right to request the attendance of a SEN expert at an IRP review, regardless of whether the school recognises that their child has special educational needs.



3. Enter the **Review Date** or click the **Calendar** button and select the required date.
4. Enter the **Result Date** or click the **Calendar** button and select the required date. This indicates the date on which the IRP ruling is due to be delivered.
5. Once the ruling has been received, select the **Review Result** from the drop-down list. The options are **Reinstatement**, **Exclusion Stands** or **Reinstatement appropriate but not in best interest of child**.
6. Record the **Reinstatement Date** only if **Reinstatement** is selected from the **Review Result** drop-down list.

Recording the Final Governor Review Outcome

The final governor review outcome for permanent exclusions must be recorded at the end of the exclusions process. The review result indicates the stage at which the final decision was reached, e.g. at the governor review stage or after the IRP stage. The IRP can recommend or direct but the final outcome is made by the governors. *

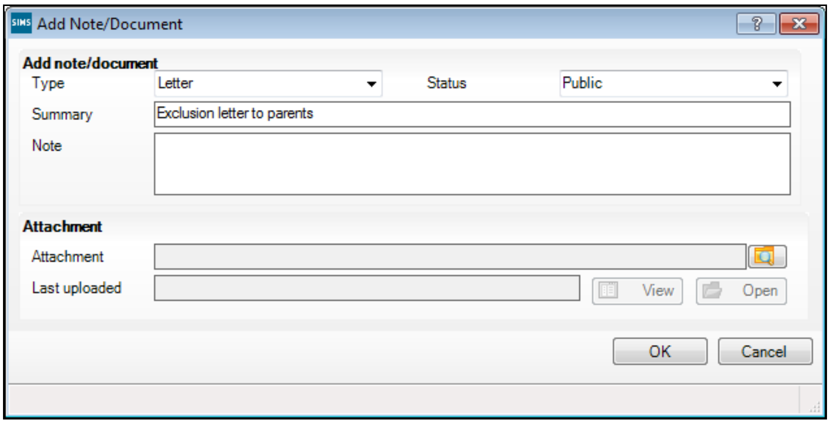


1. In the **Final Governor Review Outcome** panel, enter the **Review Date** field or click the **Calendar** button and select the date.
2. Select the outcome of the final governor review from the **Review Result** drop-down list.

*NOTE: Permanent exclusions cannot be reported to the DfE in the School Census until a Final Governor Review Outcome has been recorded. If the final outcome is **Reinstatement**, the **Review Result** is reported in the School Census from Spring 2020.*

Adding Notes/Documents to the Exclusion

1. Click the **New** button and select the appropriate type of document (if required) to display the **Add Note/Document** dialog.



2. Select the **Status** of the document from the drop-down list.
   - **Public** – the document will be available to all users with sufficient add/view/edit document permissions.
   - **Private** – the document will be available only to you.
   - **Confidential** – the document will be available only to SIMS users with School Administrator or Senior Management Team permissions.
3. If it is not already populated, enter a clear and concise **Summary** together with any further detail in the **Notes** field. This information can be useful for any reader of the attached and also if the document ever becomes detached from the pupil/student record. If you do not want to add an attachment, click the **OK** button at this point.
4. To add an **Attachment**, click the **Browse** button adjacent to the **Attachment** field and navigate to the location of a previously stored file.
5. Highlight the required document and click the **Open** button to attach it to the record.
6. Click the **OK** button to save the attachment.

   The **Last Uploaded** field remains empty until you have saved the record, then you are able to view the date and time of the last file upload, together with the name of the user who uploaded it.

   It is possible to **View** or **Open** the attached document by clicking the respective buttons adjacent to the **Last Uploaded** field. The **View** button enables users with insufficient permissions to read the contents of the attachment. These users are not able to amend or edit attachments and the attachments are opened as read-only.

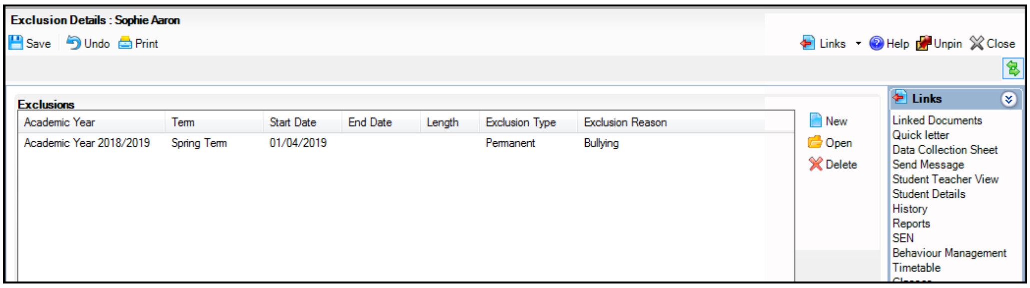
   The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When an attachment has been opened and amended and the **Save** button is clicked on the main page, an **Upload modified documents** dialog is displayed. Select the **Status** check box and click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.

A **Document Log** at the bottom of the **Edit Note/Document** panel records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. This log can be printed for future reference by clicking the **Print** button.

More Information:
Attaching a New Note/Document on page *147*

Saving the Exclusion

1. Click the **OK** button to return to the **Exclusion Details** page. A summary of the exclusions recorded for the selected pupil/student across the current academic year is displayed in the **Exclusions** panel.



When the **Exclusion Details** page is saved, the number of school days in the current academic year for which the selected pupil/student has been excluded is displayed at the bottom of the page. This figure must not exceed 45 days.

2. Click the **Save** button to save the exclusion details.

Deleting an Exclusion

1. Select **Focus | Pupil** (or **Student**) **| Exclusions** to display the **Find Student** browser.
2. Search for and highlight the required pupil/student then click the **Open** button to display the **Exclusion Details** page.
3. In the **Exclusions** panel, highlight the exclusion you wish to delete then click the **Delete** button.

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