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The content of this Handbook is only correct as of 16/04/2024

Please refer to the [online Handbook](#) for the latest updates

# **Producing the School Census Summer 2024 Return**

**English Secondary and  
Middle deemed**

**applicable to 7.216 onwards**

**Handbook**

**IMPORTANT NOTE:** The contents of these graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS.

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## Overview

This handbook provides the information needed by Secondary schools, Middle deemed Secondary schools and Academies with Secondary phase in England to complete the School Census Summer 2024 Return.

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

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

A list of items collected from Secondary/Middle deemed Secondary schools in England for the School Census Summer 2024 Return is available in a later section of this handbook (please see *Preparing Data for the School Census Return* on page 6).

*NOTE: The contents of the graphics (dates, names, panel numbers, etc.) are examples only of what you might expect to see when using SIMS to produce the School Census Return.*



### More Information:

*Preparing Data for the School Census Return* on page 6

## How has the School Census Return Changed?

**For the latest School Census Returns dates, up-to-date guidance, including the latest information and enhancements, please refer to the [Producing the School Census Summer 2024 Return \(English Secondary/Middle deemed Secondary schools\) article](#).**

## Where to Find More Information

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

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

### Additional Information

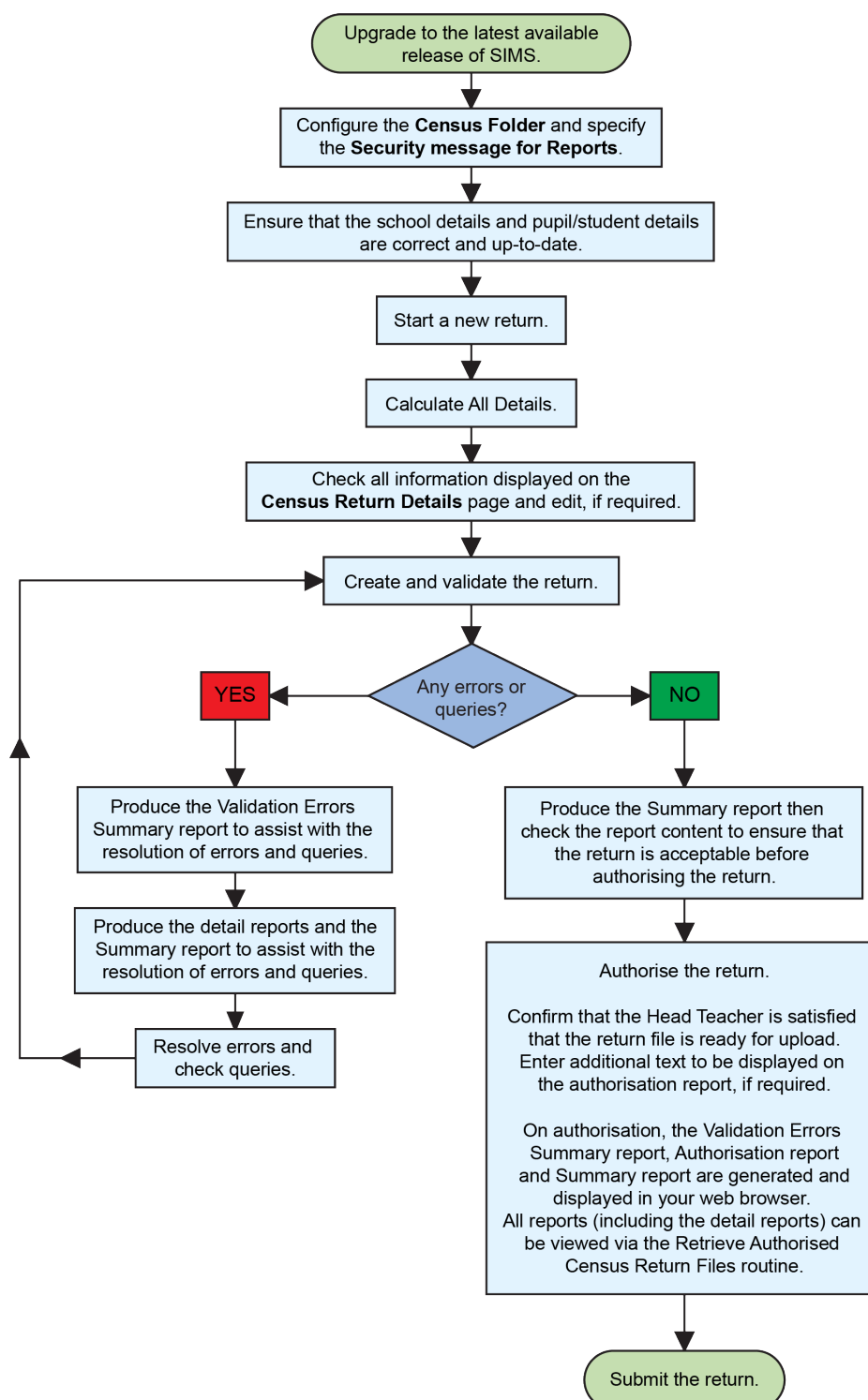
In addition to this handbook, a preparation guide that outlines how to prepare your data for the School Census, is also available from the [SIMS Statutory Returns Homepage](#).

You are strongly advised to check the following SIMS Newsfeeds because they provide a range of explanatory text, presentations, videos and spreadsheets that you may find useful. These newsfeeds are updated regularly to provide the latest news and answers to enquiries. In particular, the newsfeeds for School Census provide the latest iteration of our spreadsheet for DfE validation rules and SIMS solutions.

The [SIMS Newsfeed - Main Hub](#) provides links to all the statutory returns related newsfeeds.

## Steps to Producing the School Census Return

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







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## Setting SIMS Permissions

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

### Running the Return

To run the return, you must be a member of one of the following user groups in System Manager:

- Returns Manager
- Returns Operator.

### Editing and Preparing Data

Users who edit and prepare data must have permissions to access additional areas of SIMS, e.g. student details, school details, etc. These users must be a member of the user groups applicable to the areas they are editing (please see *Where to find More Information about Permissions* on page 5).

### Permissions Required to Import a Revised Fileset

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS) to be imported into SIMS between SIMS releases.

To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of one of the following user groups in System Manager:

- Returns Manager
- System Manager.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide. To access the SIMS **Documentation Centre**. Click the **Documentation** button located on the top right-hand side of the SIMS **Home Page**.

### Where to find More Information about Permissions

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

The [SIMS Permissions spreadsheet](#) describing the numerous permissions available in SIMS is available on the support portal.

## What Version of SIMS is Required?

To run the return, you must have the SIMS 2024 Spring Release (7.216) or later installed.

To check which version of SIMS is installed, open SIMS and then select **Help | About SIMS**. A dialog similar to the one shown in the following graphic is displayed.

The version should read 7.216 or later.

## Preparing Data for the School Census Return

**For more up-to-date checklist, including the latest information and enhancements, please refer to the online [Preparing Data for the School Census Return support article](#).**

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

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

### School Level Data

- School Characteristics:
  - LA number
  - DfE establishment number
  - school name
  - school phase
  - school type
  - highest and lowest national curriculum year
  - intake type
  - governance
  - school time
  - school email address
  - school telephone number.
- Secondary Admissions Appeals:
  - lodged
  - withdrawn
  - heard by independent admissions committee
  - upheld (decided in parents' favour) and rejected.

- Student Reconciliation:
  - part-time students not at school
  - private study students
  - students at another school
  - students on work experience
  - students at Further Education colleges.
- Class Information:
  - class name
  - number of teachers in class
  - number of adult non-teachers in class
  - class year group
  - number of students from the host school in the class
  - number of students from other schools in the class.
- Miscellaneous:
  - free school meals taken
  - childcare provision on site
  - signposted off site childcare provision
  - type of childcare (e.g. before school, after school, etc.)
  - opening time and closing time
  - number of childcare places
  - childcare provider
  - other schools
  - number of weeks that the childcare provision is open.

### **Student Level Data**

- Student Identifiers:
  - unique pupil number (UPN) and former UPN
  - unique learner number (ULN)
  - surname, forename, middle names, former surname, preferred surname
  - gender
  - date of birth.
- Student Characteristics:
  - ethnicity
  - first language
  - free school meal eligibility start date and end date, UK country in which the eligibility applies
  - school dinner taken (**applicable to schools with students in Reception, Year 1 and Year 2**)
  - Youth Support Services Agreement (YSSA) indicator
  - service children in education indicator
  - learner support code
  - top-up funding indicator

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- post looked after arrangements
- funding and monitoring
- funded hours, hours at setting (**applicable to schools with students of the applicable age**)
- young carer identified by parent/guardian or school.
- Student Status:
  - enrolment status
  - date of entry
  - date of leaving
  - part-time indicator
  - boarder indicator
  - actual national curriculum year group.
- Special Educational Needs:
  - SEN provision
  - SEN type ranking
  - SEN type for each SEN need
  - member of SEN unit indicator
  - member of resourced provision indicator.
- Alternative Provision Placement:
  - unique reference number (URN)
  - UK provider register number (UKPRN)
  - setting type
  - companies house number
  - alternative provision postcode
  - placement reason
  - placement entry date
  - SEN provision at end of entry
  - placement leaving date
  - SEN provision at placement date of leaving
  - attendance pattern and sessions per week.
- Termly Exclusion Information:
  - exclusion category
  - reason for exclusion
  - exclusion start date
  - actual number of sessions from which the student was excluded
  - SEN provision (formerly stage).
- Student Home Address: student's home address details, including post code and unique property reference number (UPRN).

- Termly Attendance Information:
  - If SIMS Attendance is in use: all attendance categories are collected in the census.
  - If SIMS Attendance is not in use: possible sessions, sessions missed due to authorised absence, sessions missed due to unauthorised absence, attendance codes and number of sessions missed, sessions attending approved educational activity, sessions unable to attend due to exceptional circumstances.

For more information and instructions on all of the preparations that need to be carried out before the census return is produced, please refer to the applicable [Preparing for the School Census](#) guide.

The preparation guide, together with other useful School Census documentation, is available from the SIMS **Documentation Centre** (accessed via the **Documentation** button, which is located on the top right-hand side of the SIMS **Home Page**).



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## Creating a New School Census Return

For more up-to-date guidance, including the latest information and enhancements, please refer to the online [Configuring the Census Folder and Specifying the Security Message for Reports support article](#).

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

The School Census Summer 2024 Return collects data for:

- all students on the register on census day.
- any additional students not on-roll on census day who:
  - had at least one Attendance session during the collection period (please see *Attendance Report* on page 43).
  - had exclusions (please see *Exclusions Report* on page 43).
  - had funding and monitoring information (please see *Funding and Monitoring Report* on page 45).
  - had an alternative provision placement (please see *Alternative Provision Report* on page 46).
  - had Learner Support funding (please see *Learner Support Report* on page 45).

The **Census Folder** and **Security message for Reports** must be specified before clicking the **New** button to create a new return. A message is displayed if a census folder has not been defined.

## 03| Producing the School Census Return

It is possible to create more than one return. This enables you to carry out dry runs to determine what data needs to be added or updated. Any unwanted returns can be deleted, providing they have not been authorised (please see *Deleting an Unauthorised Return* on page 55).

*NOTE: For schools with a November exams season, it is possible for the School Census to be run during an exams embargo period.*

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

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

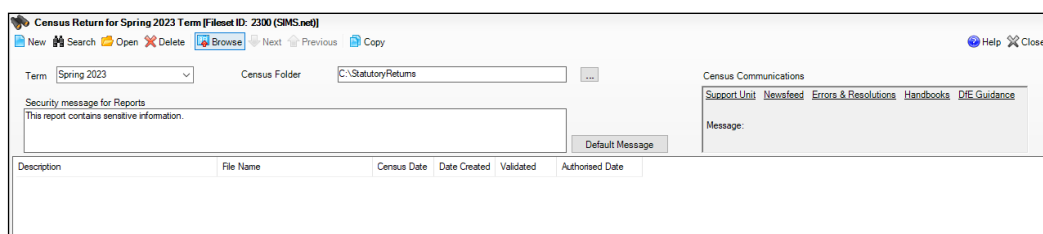
When the files are loaded, the **Census Return** browser is displayed.

The **Census Communications** message box includes links to the newsfeed, errors and resolutions document, handbooks, DfE guidance and Support Unit website (if available). Any additional information to help with the completion of the return is also displayed, if applicable.

### NOTES:

The **Fileset ID** is displayed in the browser header (for information only). The following graphic shows the position for the first release in the 2300 fileset series, where the fileset is obtained from the SIMS .net folder. As soon as any further release in the series is imported, the reference to the SIMS .net folder is no longer displayed. This is because the fileset data is then obtained from the document server. Instead the import date is displayed adjacent to the **Fileset ID**.

If a post-release consolidated database patch is applied, the patch ID and run date are also displayed in the browser.



By default, the **Term** field displays the appropriate term for the selected return, in this instance **Summer 2024**.

2. Ensure that the **Census Folder** is configured correctly and that the required **Security message for Reports** is specified before creating a **New** return, as described in the following sections.

## Configuring the Census Folder

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



**IMPORTANT NOTES:** Due to the sensitive nature of some of the data stored in SIMS, careful consideration must 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. Please refer to the government website for more information about securing your information (<https://www.gov.uk/service-manual/technology/securing-your-information>). If you are in any doubt, you should consult with your IT Security Officer before proceeding.

The General Data Protection Regulation (GDPR), which replaces the Data Protection Act 1998, is a directive for certain safeguards regarding the use of personal data. It is important that schools process all data (not just the data collected for the school census) in accordance with the full requirements of the GDPR.

Further information on the GDPR can be found on the Guide to the General Data protection Regulations (GDPR) page of the Information Commissioners Office (ICO) website (<https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr>).

1. In the School Workforce Census Folder field, enter the location of the folder where the return files are to be stored.

Alternatively, click the **Browse** button to display the **Browse For Folder** dialog.

 Browse button

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

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

3. Click the **OK** button.  
A message dialog requests confirmation that you want to continue.
4. Click the **OK** button to select or create the folder and return to the browser, where the new folder name is displayed.
5. Ensure that the **Security Message for Reports** is appropriate for your school.

## Specifying the Security Message for Reports

For more up-to-date guidance, including the latest information and enhancements, please refer to the online [Configuring the Census Folder and Specifying the Security Message for Reports support article](#).

### 03| Producing the School Census Return

The **Security message for Reports** field displays the text that will be included in the header of each report.

The default text (**This report contains sensitive information**) can be edited, if required. Clicking the **Default Message** button reverts the amended text to the original default text.

When the security message and census folder are specified, a new return can be created. Click the **New** button to display the **Census Return Details** page.

## Editing Census Details

**For more up-to-date guidance, including the latest information and enhancements, please refer to the online [Editing Census Details & Calculating All Details support article](#).**

The **Census Details** panel displays the following dates (most of which are read-only):

1 Census Details		Calculate All Details	
Census Date	19/01/2023		
Description	School Census Spring 2023		
Attendance collected from	01/09/2022	Attendance collected to	31/12/2022
Exclusions collected from	18/04/2022	Exclusions collected to	31/12/2022
AP Placements collected from	06/10/2022	AP Placements collected to	19/01/2023
FAM collected from	01/08/2022	FAM collected to	19/01/2023
Learner Support collected from	01/08/2022	Learner Support collected to	19/01/2023
*FSM collected from	07/10/2022	FSM collected to	19/01/2023
*Only collected for on roll pupils not leavers			

By default, the return **Description** is displayed as **School Census Summer 2024** but can be edited, if required, e.g. to identify a dry run.

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

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

## Specifying the Selected Period on Census Day

The selected period on the census day is used in conjunction with the class information collected in the return. It is based on the last digit of the DfE establishment number and is the period on census day (as defined by the DfE) when your school should run the return.

**NOTE:** These times move down by one each year, i.e. a school using 'one hour before the end of morning school' last year will use 'one hour after the start of morning school' this year.

For more information about the selected period on census day, please refer to the DfE guidance about how to complete the school census (<https://www.gov.uk/guidance/complete-the-school-census/data-items-2022-to-2023>). Navigate to the **Class information** section, where selected period details are documented.

By default, the lowest year on your school's timetable is displayed as the year taught in (YTI) when the timetable classes begin.

1. If the required **Reference Date** is different to that displayed (e.g. because the school is closed on census day due to severe weather conditions), enter an alternative date or select a date from the Calendar.
2. Ensure that the lowest year that you want to report as being on the timetable is displayed in the **YTI when timetabled classes begin** field. Select a different YTI from the drop-down list, if required.

Students in curriculum year groups below that displayed are assumed to be taught in non-timetabled classes, i.e. registration groups.

The screenshot shows a form titled "2 Selected Period on Census Day". It contains the following elements:
 

- Reference Date:** A date field set to "19/01/2023" with a calendar icon.
- Selected Period:** A label above a dropdown menu showing "Thu:3".
- Period Name:** A dropdown menu also showing "Thu:3".
- Include Alternative Curriculum:** A checkbox that is currently unchecked.
- YTI when timetabled classes begin:** A dropdown menu showing "Curriculum Year 7".
- Calculate All Details:** A button with a circular arrow icon.
- Text:** "The census will assume that students below this YTI are taught in registration group".

3. Select the **Selected Period** from the **Period Name** drop-down list. This is the period on census day that your school should run the return, as defined by the DfE.

**NOTE:** The **Selected Period** must be specified before you can **Calculate All Details**.

4. If you want to **Include Alternative Curriculum** periods in the **Classes** panel, select the associated check box.
5. Click the **Calculate All Details** button.

## Calculating All Details

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

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

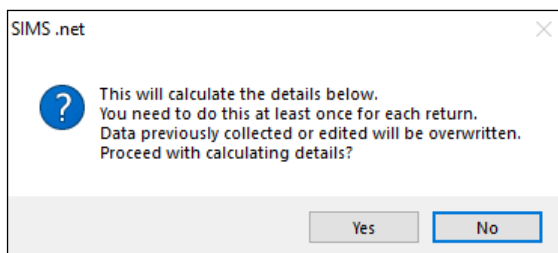
Do not use the **Calculate All Details** button more than once if you wish to keep any changes you have made. Clicking the **Calculate All Details** button overwrites any previously collected or edited data (in every panel where details are calculated automatically) with the data currently stored in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

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

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

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A message advises that any existing data currently shown on the **Census Return Details** page will be overwritten.



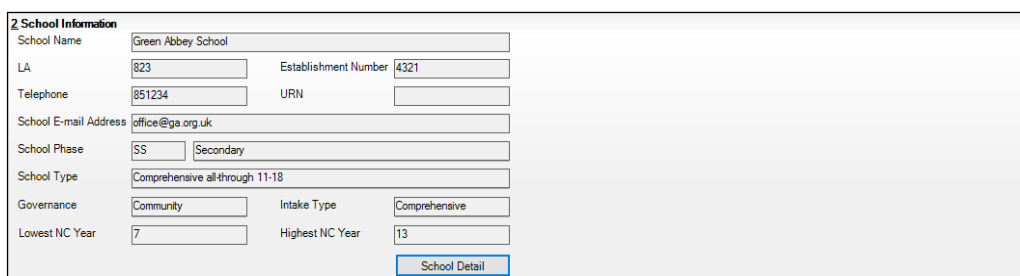
2. Click the **Yes** button to calculate all details.  
At this point, depending on the number of students in the school, there might be a short delay while details are calculated.  
The applicable panels on the **Census Return Details** page are then populated with data.
3. The return can be saved at any point by clicking the **Save** button.

## Editing School Information

**For more up-to-date guidance, including the latest information and enhancements, please refer to the online [Editing School Information support article](#).**

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

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

A screenshot of the "2 School Information" panel in SIMS. It displays various fields for school details, including School Name, LA, Establishment Number, Telephone, URN, School E-mail Address, School Phase, School Type, Governance, Intake Type, Lowest NC Year, and Highest NC Year. A "School Detail" button is located at the bottom right of the panel.

2 School Information			
School Name	Green Abbey School		
LA	823	Establishment Number	4321
Telephone	851234	URN	
School E-mail Address	office@ga.org.uk		
School Phase	SS	Secondary	
School Type	Comprehensive all-through 11-18		
Governance	Community	Intake Type	Comprehensive
Lowest NC Year	7	Highest NC Year	13
<a href="#">School Detail</a>			

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

**School Details - Green Abbey School**

Save Undo Help

1 Establishment 2 Address 3 Contact Details 4 Sites 5 Documents 6 Childcare 7 Support Unit Details

**1 Establishment**

School Name: Green Abbey School

LA: 823 Central Bedfordshire

Establishment Number: 4321

Unique Reference Number: 137247

UK Provider Reference Number:

School Phase: Secondary

School Type: Comprehensive all-through 11-18

School Governance: Community

Intake Type: Comprehensive

Previous School Name:

Previous Estab Number:

Previous URN Number:

Boarding Pupils:  Nursery Class

Head Teacher: Mr Adrian Blacker

Curriculum Years: 7 13

Pupil Genders: Coeducational

Gender on entry to school: Coeducational

Date Name Changed:

Earliest DOA:

Date Number Changed:

Special Class or Unit:

Main Contact: Mr Adrian Blacker

School Time: 32.50

OK Cancel

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

**NOTE:** The **School Name**, **LA** number, **Establishment Number**, **School Phase** and **Curriculum Years** were set up when SIMS was installed. If any of these details are incorrect, please contact your Local Support Unit for assistance.

3. Ensure that the establishment's six digit **Unique Reference Number** (URN) is entered. The number is available via the Get information about schools website (<https://get-information-schools.service.gov.uk/>), which is a register of schools and colleges in England.
4. Click the **Save** button, then click the **OK** button to return to the **Census Return Details** page, where the updated details are displayed.

## Information for Academies

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

- The **School Type** and **School Governance**.  
Select **Academies** from the applicable drop-down lists.
- The **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).  
This information is used by School Census. If the establishment number (DfE number) has changed for sponsor-led Academies, historical information is not collected, and the earliest date of admission is reported in the School Census.
- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

This information is used by the School Workforce Census. For all types of Academies opened in the collection period, the date that the establishment's URN changed is used to determine when the academy was formed. Historical information is not collected from before the date the URN changed.

## Editing School Childcare Details

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Checking and Editing School Childcare Details support article](#).**

School childcare details are collected annually in the School Census Summer return.

Details can be entered via **Focus | School | School Details**, enabling the information to be maintained at any time throughout the year.

The **Childcare** panel (on the **Census Return Details** page) displays read-only childcare provision information that has been entered previously via School Details. Additional information can be added or existing data edited by clicking the **Edit** button. This provides a direct link to the **School Details** page.

If no childcare information is recorded, a validation error is triggered when the return is run.

Calculated childcare information can be edited, if required.

Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open
Before School Childcare	Yes	No	07:00		30	School	No	
After School Childcare	Yes	No		18:00	20	School	No	
Holiday Childcare	No	No						
Under Fives Childcare	No	No						

1. Click the **Edit** button in the **Childcare** panel to display the **School Details** page.

**School Details - Green Abbey School**

Save Undo Help

1 Establishment 2 Address 3 Contact Details 4 Sites 5 Documents 6 Childcare 7 Support Unit Details

**1 Establishment**

School Name: Green Abbey School

LA: 823 Central Bedfordshire

Establishment Number: 4321

Unique Reference Number: 137247

UK Provider Reference Number:

School Phase: Secondary

School Type: Comprehensive all through 11-18

School Governance: Community

Intake Type: Comprehensive

Previous School Name:

Previous Estab Number:

Previous URN Number:

Boarding Pupils:  Nursery Class

Head Teacher: Mr Adrian Blacker

Curriculum Years: 7 13

Pupil Genders: Coeducational

Gender on entry to school: Coeducational

Date Name Changed:

Earliest DOA:

Date Number Changed:

Special Class or Unit:

Main Contact: Mr Adrian Blacker

School Time: 32.50

OK Cancel

2. Click the **Childcare** hyperlink to display the **Childcare** panel, where the current childcare details are displayed.

**6 Childcare**

Type	On Site	Signposted	Opening Time	Closing Time	No of Childcare Places	Provider	Other Schools	Weeks Open	Notes	Open
Before School Childcare	Yes	No	07:00		30	School	No			
After School Childcare	Yes	No		18:00	20	School	No			
Holiday Childcare	No	No								
Under Fives Childcare	No	No								

3. Double-click one of the four existing records to display the **Update Childcare Details** dialog. Alternatively, highlight a record then click the **Open** button.

4. Enter the required details.
  - **Type** - based on the record you have opened, the type of childcare being provided is displayed automatically. The four types of childcare collected for the return are:
    - **Before School Childcare**
    - **After School Childcare**
    - **Holiday Childcare**
    - **Under Fives Childcare.**
  - **On Site** - select the applicable option from the drop-down list:
    - **Yes** - select this option if childcare is being provided on the school premises.
    - **No** - select this option if childcare is undertaken off the school premises, i.e. your school promotes or points parents towards a regular off-site childcare service, e.g. a private or voluntary organisation.
  - **Signposted** - one of the following options must always be selected from the drop-down list:
    - **Yes, formal arrangements including transport** - select this option if your school has formal arrangements with another provider that provides childcare for your students, including transport to their site.
    - **Yes, list of providers that pick up from school** - select this option if a list of local providers that will pick up students from the school to help parents is provided.
    - **No**
    - **Not Known.**
  - **Opening Time** - enter the time that the service becomes available (not applicable to after school care).



*NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 07:00.*

- **Closing Time** - enter the time that the service closed (not applicable to before school care).

*NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 17:30.*

- **Number of Childcare Places** - enter the maximum number of childcare places that the service can provide.
  - **Provider** - select the description from the drop-down list that most accurately describes the provider of the service:
    - **School**
    - **School in Partnership** (with another provider)
    - **Other (non-school) Provider.**
  - **Other Schools** - is the service made available to children from other schools? Select as applicable from the drop-down list:
    - **Yes**
    - **No**
    - **Unknown.**
  - **Weeks Open** - enter the number of weeks for which childcare is provided (applicable to holiday and under-fives childcare only).
  - **Notes** - notes can be added and then edited later, if required.
5. Click the **OK** button to return to the **School Details** page.
  6. Click the **Save** button and then the **OK** button to return to the **Census Return Details** page.

## Editing Students with Top-Up Funding

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Editing Pupil/Students with Top-Up Funding support article](#).**

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

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

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

3 Top-up Funding						
Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in
Abdullah	Abdullah	Tamwar	8	8E	K	No
Marsden	Marsden	Olivia	8	8B		No
Terrell	Terrell	Kara	10	10B		No
Tuner	Tuner	Lacey	11	11E		No

### 03| Producing the School Census Return

The information displayed in the **Top-up Funding** panel is read-only. Updating top-up funding information, e.g. adding or removing a student, must be done via the **Edit** button.

1. Click the **Edit** button to display the **Update Students with Top-up Funding** dialog. The students currently recorded as having top-up funding are displayed in the **Top-up Funding** list (located in the bottom half of the page).
2. Use the **Students On-Roll on Census Day** search criteria to locate the additional students you wish to record as having top-up funding.

*TIP: Click the **Search** button to display a list of all students who have not been defined as having top-up funding. Alternatively, enter all or part of the required search criteria then click the **Search** button.*

Term Spring 2023 Students On-Roll on Census Day

Surname  Forename  YTI All Reg All

Preferred Surname  SEN <Any> Ever in care at this school <Any>

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
Smith	Smith	Alex	13	L		No
Smith	Smith	Aria	10	10B		No
Smith	Smith	Daniel				No
Smith	Smith	Erin	8	8B		No
Smith	Smith	Jade				No
Smith	Smith	Osias				No
Smith	Smith	Tabitha	11	11E		No
Smith	Smith	Tristan				No
Smitham	Smitham	Jason	13	Q		No

3. Highlight the student(s) who you want to record as having top-up funding, then click the **Add** button to move the selected student(s) to the **Top-up Funding** list.

One or more students can be selected using the **Ctrl+click** or **Shift+click** functionality.

Term  Students On-Roll on Census Day

Surname  Forename  YTI  Reg

Preferred Surname  SEN  Ever in care at this school

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Smith	Smith	Alex	13	L		No
Smith	Smith	Aria	10	10B		No
Smith	Smith	Erin	8	8B		No
Smith	Smith	Jade				No
Smith	Smith	Osias				No
Smith	Smith	Tabitha	11	11E		No
Smith	Smith	Tristan				No
Smitham	Smitham	Jason	13	Q		No

Top-up Funding

Surname	Preferred Surname	Forename	YTI	Reg	SEN	Ever in Care
▶ Abdullah	Abdullah	Tamwar	9	9A	K	No
Marsden	Marsden	Olivia	9	9B		No
Terrell	Terrell	Kiara	10	10D		No
Tuner	Tuner	Lacey	12			No
Smith	Smith	Daniel				No

- To remove a student from the **Top-up Funding** list, highlight the required student, then click the **Remove** button. The student's record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
- Click the **Update** button to save the data and arrange the list of students in **Surname** order.
- Click the **OK** button located at the bottom right-hand side of the screen to return to the **Census Return Details** page, where the updated information is displayed in the **Top-up Funding** panel.



#### Additional Resources:

*Preparing for the School Census Summer 2024 Return guide*

## Editing Student Post Looked After Arrangements

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Editing Pupil/Students Post Looked After Arrangements support article](#).**

The Post Looked After Arrangements routine provides schools with the ability to record whether students who are on-roll on census day were looked after immediately before adoption or prior to being the subject of a residence or special guardianship order.

### 03| Producing the School Census Return

If the students with post looked after arrangements (PLAA) have been recorded previously via **Tools | Statutory Return Tools | Update Post Looked After Arrangements**, the data is displayed in the **Post Looked After Arrangements** panel.

1. Click the **Recalculate** button (in the **Post Looked After Arrangements** panel) to ensure that all students who already have a PLAA status are displayed.

The screenshot shows a panel titled "4 Post Looked After Arrangements". It contains a table with the following data:

Surname	Preferred Surname	Forename	YTI	Reg	Ever in C.	Ceased to be looked after through
Aaron	Aaron	Chris	12		No	Adoption from England and Wales
Adams	Adams	Adam	13	G	No	Adoption from state care outside of England and Wales
Celestena	Celestena	Romano	9	9F	No	Special guardianship order (SGO) from England and Wales
Formichella	Formichella	Rosetta	12		No	Adoption from England and Wales
France	France	Damon	12		No	Adoption from England and Wales

Buttons for "Edit" and "Recalculate" are visible at the top of the panel.

The information displayed in the **Post Looked After Arrangements** panel is read-only. Updating the information, e.g. editing the PLAA status or adding a student, must be done via the **Edit** button.

2. Click the **Edit** button to display the **Update Students Post Looked After Arrangements** page. Any students currently recorded as having PLAA are displayed in the **Post Looked After Arrangements** list located in the bottom half of the page.
3. Use the **Students On-Roll on Census Day** search criteria to locate the additional students you wish to record as having PLAA.

***TIP:** Click the **Search** button to display a list of students who have not been defined as having PLAA. Alternatively, enter all or part of the required search criteria then click the **Search** button.*

The screenshot shows the "Students On-Roll on Census Day" search interface. It includes search filters for Term (Spring 2023), Surname (smith), Forename, YTI (All), Preferred Surname, Reg (All), and Ever in Care at this school (<Any>). A search button is present. Below the filters is a table of student records:

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care
Smith	Smith	Alex	13	L	No
Smith	Smith	Aria	10	10B	No
Smith	Smith	Daniel			No
▶ Smith	Smith	Erin	8	8B	No
Smith	Smith	Jade			No
Smith	Smith	Tabitha	11	11E	No
Smith	Smith	Tristan			No
Smitham	Smitham	Jason	13	Q	No

4. Highlight the students who you want to record as having PLAA, then click the **Add** button to move the selected students automatically to the **Post Looked After Arrangements** list.

One or more students can be selected using the **Ctrl+click** or **Shift+click** functionality.

Surname	Preferred Surname	Forename	YTI	Reg	Ever in Care	Ceased to be looked after through	Evidence Obtained
Aaron	Aaron	Chris	12		No	Adoption from England and Wales	<input checked="" type="checkbox"/>
Adams	Adams	Adam	13	G	No	Adoption from state care outside of England and Wales	<input type="checkbox"/>
Celestena	Celestena	Romano	9	9F	No	Special guardianship order (SGO) from England and Wales	<input checked="" type="checkbox"/>
Formichella	Formichella	Rosetta	12		No	Adoption from England and Wales	<input checked="" type="checkbox"/>
France	France	Damon	12		No	Adoption from England and Wales	<input type="checkbox"/>
Smith	Smith	Erin	8	8B	No	Adoption from England and Wales	<input checked="" type="checkbox"/>

- For each student added to the **Post Looked After Arrangements** list, select the post looked after arrangement status by clicking in the applicable cell in the **Ceased to be looked after through** column, then selecting the required status from the drop-down list:
  - Adoption from England and Wales
  - Adoption from state care outside of England and Wales
  - Special guardianship order (SGO) from England and Wales
  - Residence order (RO) from England and Wales
  - Child arrangement order (CAO) from England and Wales.
- Select the **Evidence Obtained** check box if documents have been obtained that provide evidence of the post looked after arrangements.

If you indicate that evidence has been obtained, ensure that the applicable documents are stored securely either outside of SIMS or within the Document Management Server.

**NOTE: Evidence Obtained** is not collected in the School Census return but should be recorded as proof of DfE/Ofsted compliance.

- To remove a name from the list, highlight it then click the **Remove** button. The record is moved to the **Students On-Roll on Census Day** list, from where it can be reselected, if required.
- Click the **Update** button to save the information and arrange the list of students in surname order.

If you have indicated that evidence has been obtained, you are reminded to ensure that the necessary documents are stored securely outside of SIMS or within the Document Management Server.
- Click the **OK** button to continue.
- Click the **OK** button (located at the bottom right-hand side of the screen) to return to the **Census Return Details** page, where the updated information is displayed in the **Post Looked After Arrangements** panel.



#### Additional Resources:

*Preparing for the School Census Summer 2024 Return guide*



#### More Information:

*Post Looked After Arrangements Report on page 46*

## Updating Funding and Monitoring

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Updating Funding and Monitoring support article](#).**

The pupil level Update Funding and Monitoring functionality is provided to enable schools to record aspects of the Education Recovery Package.

From the start of the academic year 2023/2024 (the 1 August is the earliest possible date), schools should record tutoring that was delivered via any of the following National Tutoring Programme (NTP) delivery routes:

- tuition partners
- academic mentors
- school-led tutoring.

In the previous academic year school-led tutoring only was collected.

More information about the National Tutoring Programme is available on the GOV.UK website <https://www.gov.uk/government/publications/national-tutoring-programme-ntp>.

The information can be recorded via the **Tools** menu and maintained at any time during the academic year.

The information required is based on individual students:

- Student in receipt of tutoring programme: Applicable to all schools (except Nursery schools), with the appropriate year groups or age groups, i.e. pre-16. For students in National Curriculum Year Actual 1 to 11, or aged 5 to 15 as at 31/08/2023 in National Curriculum Year Actual 'X' for special schools. (Funding and Monitoring code = **01**.)
- Student in receipt of 16 to 19 tuition fund: Applicable to Secondary, All-Through and Pupil Referral Units or Alternative Provision schools with a sixth form. For students in National Curriculum Year Actual 12 and above with current single registration (**C**) or current main dual registration (**M**). Pupil Referral Units or Alternative Provision for any student with the following enrolment status: **C, M, F** or **O**. (Funding and Monitoring code = **21**.)
- Student repeating up to one full year of 16 to 19 funded provision: Applicable to Secondary, All-Through and Pupil Referral Units or Alternative Provision schools with a sixth form. For students in National Curriculum Year Actual 12 and above with current single registration (**C**) or current main dual registration (**M**). Pupil Referral Units or Alternative Provision for any student with the following enrolment status: **C, M, F** or **O**. (Funding and Monitoring code = **22**.)

Detailed guidance about the expectations and conditions attached to tutoring funding is available on the GOV.UK.

### What Data should be entered?

*NOTE: Before entering tutoring hours, ensure that **Tutoring** is selected for applicable students only. When a tick is displayed, values can be entered in the corresponding 'cumulative hour' cells.*

The following table describes the values that should be entered in each 'hours' column.

	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Cumulative Hrs at 31 Aug
Description of expected values	All hours of tutoring from the start of the Autumn term to the Autumn census date.	All hours of tutoring from the start of the Autumn term to the Spring census date.  The number of hours entered must be greater than or equal to the Autumn hours.	All hours of tutoring from the start of the Autumn term to the Summer census date.  The number of hours entered must be greater than or equal to the Spring hours.	All hours of tutoring from the start of the Autumn term to the Summer census date plus any additional hours that occurred after the Summer census date.  The number of hours entered must be greater than or equal to the Summer hours.
Scenario	Five hours tuition received from 01/08/2023 to 05/10/2023.	Three hours received after 05/10/2023 to 18/01/2024.	Two hours received after 18/01/2024 to 18/05/2024.	One additional hour after 18/05/2024 to 31/07/2024.  Not applicable to the census but required for ESFA reporting.
Example values for each column	5	8	10	11

A red 'cumulative hours' cell indicates that the value entered has failed the validation. A message providing more details is displayed in the status bar at the bottom of the **Update Funding and Monitoring** page.

## Editing Funding and Monitoring

If funding and monitoring details have been recorded previously via **Tools | Statutory Return Tools | Update Funding and Monitoring**, the information is displayed in the **Funding and Monitoring** panel.

5 Funding and Monitoring								
Name	YTI	16-19 Tuition Fund	Repeating Post-16 Year	Tutoring	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Cumulative Hrs at 31 Aug
Aaron,Liz	11			✓	4			
Aaron,Sophie	11			✓	5			
Abhra,Abjit	7			✓	3			
Acton,Jordan	13	✓						
Chapman,Amber	8			✓				
Mollohan,Keara	7			✓				
Smith,Aria	9			✓				

### 03| Producing the School Census Return

*NOTE: Only students with funding and monitoring information are displayed in the **Funding and Monitoring** panel.*

1. Click the **Recalculate** button (in the **Funding and Monitoring** panel) to ensure that the latest details are displayed.
2. If you wish to update the information, click the **Edit** button to display the **Update Funding and Monitoring** page.

Census																				
Academic Year		2022/2023 On roll and leavers from 01/08/2022 to 19/01/2023																		
Effective Date		19/01/2023																		
Students View																				
Age at 31/08/2022		All	YTI	All	Year Group	All	Reg	All	SEN	All	Depriation Pupil Premium	All	FSMEver6	All	Pupil Premium Indicator	All				
Name	Date of Birth	Age at 31/08/2022	YTI	Year Group	Reg	Enrolment Status	DOL	SEN	Dep PP	FSMS	PP Ind	16-19 Tuition Fund	Repeating Post-16 Year	Starting New Programme	Tutoring	Cumulative Hrs at Aut Census	Cumulative Hrs at Spr Census	Cumulative Hrs at Sum Census	Cumulative Hrs at 31 Aug	Notes
Aaron,Chris	01/09/2005	16	11	Year 11	11A	Single Registration			2021/2022	Yes	2021/2022									
Aaron,Jason	08/03/2006	16	11	Year 11	11B	Single Registration				No										
Aaron,Liz	01/09/2005	16	11	Year 11	11C	Single Registration			2021/2022	Yes	2021/2022				✓		4			
Aaron,Sophie	01/09/2005	16	11	Year 11	11D	Single Registration			2021/2022	Yes	2021/2022				✓		5			
Abdullah,Tamwar	12/01/2009	13	8	Year 8	8A	Single Registration		K		No										
Abhra,Abjit	10/17/2005	17	12	Year 12	7A	Single Registration				No			✓	✓	✓		3			
Adrian, Jordan	11/02/2004	18	13	Year 13	7	Single Registration			2012/2018	No	2012/2018	✓	✓	✓						

3. In the **Student View** panel, specify the required filters. The content of the **Student** panel changes to reflect the options selected.

Read-only student information is displayed in the columns on the left-hand side of the **Student** panel. This information is shown as at the system date. Cells with a white background are editable.

4. Right-click anywhere in the **16-19 Tuition Fund** column, then select the required option from the pop-up menu.
  - a. If most or all of the students have been receiving tuition funding, select the **Check All** option.
  - b. Any students who have not been receiving tuition funding can then be deselected by clicking the **16-19 Tuition Fund** cell adjacent to their name.
5. Specify which students are **Repeating Post-16 Year** by right-clicking anywhere in the column, then selecting the required option from the pop-up menu.

Bulk or Individual entry can be achieved using the same method as described for 16-19 tuition funding.

Where **Repeating Post-16 Year** has been ticked for a Year 13 and above student, a completed programme and an additional continuing programme is reported.

If a Year 12 student is repeating their Post 16 year, the **Starting New Programme** column is activated.

6. Specify which Year 12 students are **Starting New Programme** by right-clicking anywhere in the column, then selecting the required option from the pop-up menu.

Where **Repeating Post-16 Year** has been ticked for a Year 12 student and **Starting New Programme** has also been ticked, the XML return file will report a completed programme and an additional continuing programme.



Where **Repeating Post-16 Year** has been ticked for a Year 12 student and **Starting New Programme** is not ticked, a continuing programme is reported.

7. Right-click anywhere in the **Tutoring** column, then select the required option from the pop-up menu.
  - a. If most or all of the students have been receiving tutoring, select the **Check All** option.
  - b. Any students who have not been receiving tutoring can then be deselected by clicking the **Tuition** cell adjacent to their name.
8. When a tick is entered in a **Tutoring** cell, the corresponding 'cumulative hour' cells are then editable. The number of tutoring hours (to the nearest 0.5) that the student has received as at the applicable census date should be entered.

After entering a value in the **Cumulative Hrs at Aut Census** column it is possible to auto-populate the 'hours' cells to the right. The associated cell turns red.

When you click in (or tab to) the **Cumulative Hrs at Spr Census** cell, the autumn value is copied to all the 'hours' cells to the right. This value is the minimum cumulative hours possible.

These values can be edited when you know the hours that have been delivered.

**IMPORTANT NOTE:** To deselect tutoring, all of the existing hours must be removed for the selected student(s). Clicking the **Undo** button reverts the changes, if required.

*The cumulative Summer hours only are reported in the Summer census.*

9. In the **Cumulative Hrs at 31 Aug** column, enter the total number of tutoring hours for the whole academic year up until 31 August, which includes the summer holidays. The value entered must be greater than or equal to that entered in the **Cumulative Hrs at Sum Census** column.
 

A red cell indicates that the value is less than that entered in the **Cumulative Hrs at Sum Census** column and must be amended.

*NOTE: The values entered in the **Cumulative Hrs at 31 Aug** column are not reported in the census. This functionality has been provided to enable schools to record data required by the Education and Skills Funding Agency (ESFA) (<https://www.gov.uk/government/publications/recovery-premium-funding/recovery-premium-funding>).*

10. Enter **Notes**, if required. This information is for your school's use and is not collected in the census.
11. Click the **Save** button and then click the **OK** button to return to the **Census Return Details** page.

*NOTE: All validation errors (red cells) must be resolved before saving the data.*

DfE guidance about Learner funding and monitoring (FAM) is available on the GOV.UK website (<https://www.gov.uk/guidance/complete-the-school-census/data-items-2022-to-2023>).

## Editing Class Information

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Editing Class Information support article](#).**

When the School Census is generated, the class information displayed is a 'snapshot' of SIMS data as of the selected period on census day. The selected period is based on the last digit of your DfE establishment number (please see *Specifying the Selected Period on Census Day* on page 14).

*NOTE: If the school is closed on census day, the information displayed is still based on classes as at census day.*

If the **Include Alternative Curriculum** check box is selected (in the **Selected Period on Census Day** panel), Alternative Curriculum periods are included in the list of class names displayed in the **Classes** panel.



### More Information:

*Class Report* on page 46

## Editing Timetabled Classes

The timetabled classes previously set up in Nova/Academic Management are displayed in the read-only **Class Name** column. The **Total** numbers of students and staff are calculated automatically and displayed at the bottom of the panel.

Class Name	Students(On Roll)	Students(Guest)	Teachers	Support Staff	YTI
10x/En1	28	0	1	0	Year 10
10x/Sc2	27	0	1	0	Year 10
10x/Sc3	26	0	1	0	Year 10
10y/En1	27	0	1	0	Year 10
10y/En2	27	0	1	0	Year 10
10y/En3	26	0	1	0	Year 10
<b>Total</b>	<b>888</b>	<b>0</b>	<b>38</b>	<b>1</b>	

Check and, if necessary, edit the following information.

- **Students (On Roll)**

The number of students in the timetabled class at the selected period is displayed. The entries in this column can be edited if required. Ensure that:

- any students temporarily absent on the census day are included.
- any part-time students not scheduled to be in school at the selected period are excluded. These students should be counted in the **Student Reconciliation** panel instead (please see *Editing Student Reconciliation* on page 32).

- **Students (Guest)**  
This column displays any guest students who are normally in the timetabled class at the selected period. Ensure that any guest students have an **Enrolment Status** of **Guest student** in the **Student Details** panel (**Focus | Students | Student Details**).
- **Teachers**  
Include all qualified and unqualified teachers taking the timetabled class at the selected period.  
Exclude teachers who are:
  - wholly or mainly providing support to individual students.
  - on Planning, Preparation and Assessment (PPA) time.
- **Support Staff**  
Include teaching assistants, special needs support staff, support staff for minority ethnic students and other education support staff in the timetabled class at the selected period.  
Exclude non-teaching staff wholly or mainly providing support to individual students.
- **Year Taught In**  
This column shows the curriculum year group of each class displayed. To edit the year group, click in the cell and select from the drop-down list.  
Select **Mixed Year** if a timetabled class contains students from more than one National Curriculum year.

*NOTE: This does not include classes containing any students who have been held back, or advanced a year and are of a different chronological age to the rest of the class.*

**PPA Teachers, Type, Key Stage** and **Activity** (applicable to schools that have timetabled classes for Years Taught In under 7)

These columns are displayed/active only if your school has timetabled classes for Years Taught In under 7. If applicable, enter the required values.

## Recalculating the Classes Information

The data in the **Classes** panel can be replaced with the original data from the database by clicking the appropriate **Recalculate** button.

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

## Adding Classes

It might be necessary to add an additional class if, for example, some students are receiving additional teaching support. This is achieved by clicking the **New** button then entering the applicable class information in the additional row, which is displayed at the bottom of the table.

*NOTE: Remember to reduce the number of students in the main class.*

Ensure that you click the **Save** button to save the data and refresh the display.

## Deleting Classes

In some circumstances, classes might need to be deleted, e.g. if they do not normally take place at the selected period. This is achieved by highlighting the class then clicking the **Delete** button.

**IMPORTANT NOTE:** *If you delete a class that contains pupils, you must NOT recalculate. To ensure the manual changes you have made to the pupil numbers are correct use the Create and Validate option.*

## Editing Student Reconciliation

For more up-to-date guidance, including the latest information and enhancements, please refer to the [Entering Pupil/Student Reconciliation support article](#).

The **Student Reconciliation** panel is used to reconcile the various categories of students with the numbers in the **Classes** panel. The number of on-roll students who are not in class at the selected period, because they are attending another school, part-time, etc. should be entered in the appropriate fields.

8 Student Reconciliation					
On roll students in classes	<input type="text" value="904"/>			Total students	<input type="text" value="904"/>
Part-time students not at school	<input type="text" value="0"/>	Students on work experience	<input type="text" value="0"/>	Must agree with	
Private study students	<input type="text" value="0"/>	Students at FE colleges	<input type="text" value="0"/>	Students on roll	<input type="text" value="937"/>
Students at another school	<input type="text" value="0"/>				

For example:

In the previous example there are 937 **Students On Roll** but only 904 **On Roll students in classes**. The difference must be accounted for. This could be the number of students who are attending another school at the selected period. In which case, 33 should be entered in the **Students at another school** field.

1. If applicable, enter the number of **Part-time students not at school**, the number of **Private study students** and the number of **Students at another school**.
2. If applicable, enter the number of **Students on work experience** and the number of **Students at FE colleges**.
3. Check the values in the **Total students** and **Students On Roll** fields. The two values must be the same.

The value in the **Total students** field is calculated automatically and equals the sum of the following:

- **On roll students in classes**
  - **Part-time students not at school**
  - **Private study students**
  - **Students at another school**
  - **Students on work experience**
  - **Students at FE colleges.**
4. Amend the values in the editable fields, if necessary.

## Entering Attendance Information

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Entering Attendance Information support article](#).**

Termly attendance data (including attendance codes and the number of sessions missed) should be provided for non-boarder students and leavers aged four to 15, who were on-roll for at least one session during the collection period.

Initially the **Attendance** panel is blank. However, after clicking the **Calculate All Details** button (located in the **School Information** panel) the display changes.

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

The information displayed in the **Attendance** panel (after the **Calculate All Details** button is clicked) is dependent on which of the following is applicable:

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



### More Information:

*Attendance Report* on page 43

## SIMS Attendance/Lesson Monitor Users

If SIMS Attendance/Lesson Monitor is in use, data is collected on all categories of school attendance. Ensure that all missing marks and unexplained absences for the previous term have been dealt with before commencing the return.

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

## Are your Attendance Codes DfE Compliant?

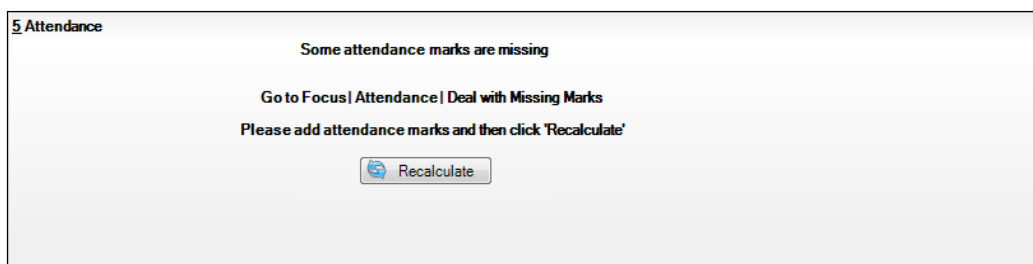
If Attendance/Lesson Monitor is in use and your school is using DfE compliant attendance codes, attendance data is entered directly into the return, providing that there are no missing marks.

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If all attendance marks have been entered in Attendance/Lesson Monitor, the following message is displayed in the **Attendance** panel, informing you that your attendance codes are DfE compliant but will be rechecked at the Create and Validate stage.



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



1. Use the Deal with Missing Marks routine (**Focus | Attendance (or Lesson Monitor) | Deal with Missing Marks**) to locate the missing marks and enter appropriate attendance codes.
2. Return to the **Census Return Details** page and click the **Check missing marks** button in the **Attendance** panel to ensure that all missing marks have been dealt with.

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

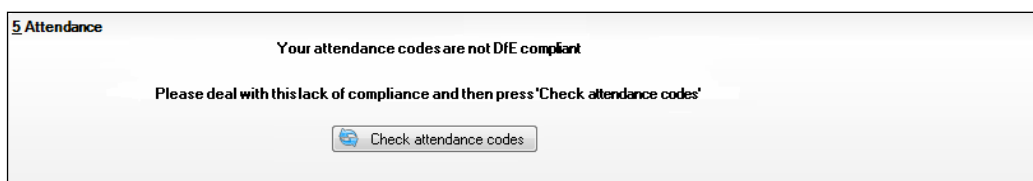


#### **More Information:**

*Producing Detail Reports on page 42*

### **Are your Attendance Codes DfE Non-Compliant?**

If Attendance/Lesson Monitor is in use but one or more invalid attendance codes have been detected, a message is displayed in the **Attendance** panel to inform you that your attendance codes are not DfE compliant.



1. Non-compliant codes must be dealt with. Please contact your Local Support Unit for assistance.
2. Click the **Check attendance codes** button to check that DfE attendance codes are now in use.

If the attendance codes are now DfE compliant, a message informs you that the codes will be rechecked at the **Create & Validate** stage.

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

## SIMS Attendance/Lesson Monitor Not in Use

If Attendance/Lesson Monitor is not in use, the following data must be entered manually:

- Termly Possible Sessions (**T Poss Sessions**)
  - Termly Sessions Missed due to Authorised Absence (**T Auth Absences**)
  - Termly Sessions Missed due to Unauthorised Absence (**T Unauth Absences**)
  - Total sessions attending approved educational activity (**T AEA Sessions**)
  - Total sessions unable to attend due to exceptional circumstances (**T Excep Sessions**).
1. To filter the display of students in the **Attendance** panel, select **Year Group**, **Registration Group** or **Enrolment Status** from the **Group By** drop-down list.

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

Attendance									
Attendance Application not in use. Manual entry is required.									
<input type="button" value="Check for additional pupil &amp; zero totals"/>									
<input checked="" type="button" value="Group By"/>									
Surname	Forename	YTI	Reg Group	Enrol Status	T Poss Sessions	T Auth Absences	T Unauth Absences	T AEA Sessions	T Excep Sessions
Abbott	Jessica	Year 2	2JB	On Roll	0	0	0	0	0
Abhra	Abjit	Year 6	6VC	On Roll	0	0	0	0	0
Abhra	Alisha	Year 6	6VC	On Roll	0	0	0	0	0
Abhra	Shaquib	Year 2	2JB	On Roll	0	0	0	0	0
Abrams	Paul	Year 1	ELM	On Roll	0	0	0	0	0
Ackton	Charlotte	Year 2	2GH	On Roll	0	0	0	0	0
Ackton	Stan	Year 6	6KH	On Roll	0	0	0	0	0
Adams	Nancy	Year 4	4ES	On Roll	0	0	0	0	0
Adams	Sadie	Year 3	3CB	On Roll	0	0	0	0	0
Aditya	Zayan	Year R	PINE	On Roll	0	0	0	0	0
Ainsley	Charlotte	Year 1	OAK	On Roll	0	0	0	0	0
Akeman	Richard	Year 5	5BB	On Roll	0	0	0	0	0
Akeman	Steven	Year 5	5DT	On Roll	0	0	0	0	0
Alala	Candis	Year 4	4SL	On Roll	0	0	0	0	0

2. To sort the displayed data by surname, forename, year group, registration group or enrolment status, click the appropriate column header.
3. For each student, enter the correct attendance numbers in the appropriate columns.
4. To clear the attendance information and check for additional students, click the **Check for additional students & zero totals** button.

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

## Entering General Information

For more up-to-date guidance, including the latest information and enhancements, please refer to the [Entering General Information support article](#).

The **General** panel deals with the number of students who receive Free School Meals on census day.

<b>12 General</b>	
Number of free school meals taken on census day	<input type="text" value="0"/> FSM taken excludes the infant pupil universal entitlement (except for pupils in R,1,2 who are eligible for FSM)

Enter the **Number of free school meals taken on census day** by students, in any year, who are eligible for Free School Meals.

- Students should be included only if they meet the Free School Meals eligibility criteria (i.e. in respect to family income).
- If your school has students of a young age, do not include students taking school meals in Reception, Year 1 and Year 2, if they are not eligible for Free School Meals in respect to family income, e.g. they are receiving a Universal Infant School Meal only.



### More Information:

*General Report on page 46*

## Entering Secondary Admissions Appeals Totals

Applicable to Secondary, Middle deemed Secondary and All-Through schools. Schools that were Academies, Voluntary Aided schools or Foundation schools at the time that the appeals were lodged, should also complete this panel.

For more up-to-date guidance, including the latest information and enhancements, please refer to the [Collating and Entering Admission Appeals Information support article](#).

The **Secondary Admissions Appeals** panel deals with appeals lodged before 1<sup>st</sup> August against refusals to admit a student for a place at your school at the start of the academic year.

All fields in this panel are editable and must be populated manually.

<b>11 Secondary Admissions Appeals</b>	
Foundation Schools/Voluntary Aided Schools/Academies must complete this section (this does not include AP Academies, AP Free Schools, Academy Special Schools)	Independent Admissions Committee
Lodged <input type="text" value="0"/>	Heard <input type="text" value="0"/>
Withdrawn <input type="text" value="0"/>	Upheld <input type="text" value="0"/>
	Rejected <input type="text" value="0"/>

- Enter the total number of admissions appeals that have been **Lodged** and the total that have been **Withdrawn** before 1<sup>st</sup> August against a refusal to admit a child to the school for a place at the start of the 2023/2024 academic year.

Information about appeals lodged on or after 1<sup>st</sup> August is not required. Enter information related to entry to the school at the start of the academic year only.

- Enter the total number of admissions appeals **Heard**, **Upheld** and **Rejected** by the **Independent Admission Committee**.



When this panel is complete and you are satisfied that all the details on the **Census Return Details** page are correct, the census return file can be created and validated (please see *Creating and Validating the School Census Return* on page 39).



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## Creating and Validating the School Census Return

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Creating and Validating the school Statutory Return support article](#).**

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

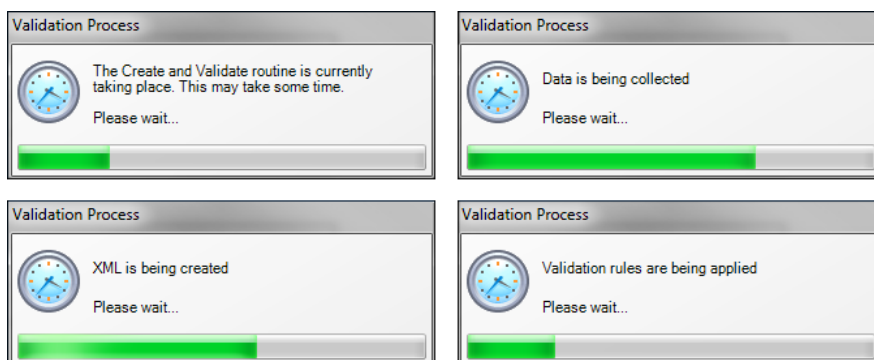
Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed.

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

1. Select **Routines | Statutory Returns | School Census** to display the **Census Return** browser.
2. Click the **Search** button to display a list of returns.
3. Double-click the required return to display the **Census Return Details** page.
4. Click the **Create & Validate** button to start the process. There may be a short delay, depending on the number of students at your school.

## 04| Completing the School Census Return

A progress bar is displayed, indicating that the Create and Validate process is being performed.



During the Create and Validate process, SIMS examines the data for any anomalies applicable to your school phase, e.g. no top-up funding information, missing attendance marks, permanent exclusions without a final governor review result, etc.

If an anomaly is found, a message is displayed, which provides the opportunity to continue to create and validate or cancel the process, so that details can be checked. Detail reports are available to assist you when checking details.

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



### Additional Resources:

*Dealing with Missing Marks* section in the *Edit Marks Routine* chapter of the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

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

The *DfE Validations and SIMS Solutions Excel* workbook

([https://customer.support-ess.com/csm?id=kb\\_article\\_view&sysparm\\_article=KB0050590](https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0050590)).

## Resolving Validation Errors and Checking Queries

After creating the return file and validating the data, any errors and queries found are listed in the **Validation Errors Summary** panel.

Type	Sequence	Message	Location	Solution
F	1500	UPN missing	Name: Abraham, Janel Date of Birth: 2005-05-19, Female/UPN	# Go to Focus   Student   Student Details and add or issue a UPN.
F	1500	UPN missing	Name: Reid, Rosal Date of Birth: 2009-03-07, Female/UPN	# Go to Focus   Student   Student Details and add or issue a UPN.
F	1840	Pupils aged 5 and over Language missing or invalid.	Name: Henderson, Jacki Date of Birth: 2010-05-07, Male/UPN: K822299140	# Go to Focus   Student   Student Details Ethnicultural panel and enter First language
F	2350	Insufficient Address information provided.	Name: Bains, Kirki Date of Birth: 2005-01-18, Male/UPN: H820200109012	# Go to Focus   Student   Student Details Addresses and edit pupil's address
Q	1601Q	Please Check: Pupil's age is out of range for school type.	Name: Sungail, Skaislei Date of Birth: 2008-03-28, Female, Age: 12/UPN: B8	# Go to Focus   Student   Student Details and enter pupil's date of birth.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo Date of Birth: 2013-02-03, Male/UPN:	# Go to Focus   Student   Student details and check for duplicate pupil record.
Q	1620Q	Please check: duplicate pupil records with the same Surname, Forename, Gender and Date of birth.	Name: Bennison, Hugo Date of Birth: 2010-02-03, Male/UPN: V82329991400	# Go to Focus   Student   Student details and check for duplicate pupil record.
	2350Q	Please check: Pupil record with no address details.	Name: Bellacki, Celia Date of Birth: 2013-09-14, Female/UPN: F89329991400	# Go to Focus   Student   Student Details Addresses and edit pupil's address

The **Validation Errors Summary** panel header displays the number of errors and queries found when the Create and Validate routine was run. A student and error search facility is also available.

The following information is provided to help with the resolution of validation failures:

- **Type** - the type of validation rule.
  - Failure (**F** displayed in red) indicates an error that must be resolved.
  - Query (**Q** displayed in black) indicates that there are unusual data conditions. These should be considered and corrected, if necessary.
- **Sequence** - the validation error or query number.
- **Message** - the validation error or query message text.
- **Location** - the specific record in SIMS that contains the error or query.
- **Solution** - the SIMS menu route and/or instructions about where/how the error can be corrected or the query checked.

*TIP: Using the Solution hyperlinks*

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

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

*Click the required hyperlink to display the specific area in SIMS where the record(s) can be checked/corrected.*

To assist in the viewing of errors and queries:

- When the mouse pointer is hovered over a **Message**, **Location** or **Solution**, hover help displays the entire content of that cell.
- The Student Search functionality can be used to display all errors and queries relating to a particular student.
  - a. Enter all or part of a UPN, student's surname or date of birth in the **Student Search** field.
  - b. Select the required record from the **Student Search** drop-down list to populate the **Student Search** field.
  - c. Click the **Find** button to display the applicable validation records.
- Use the **Errors Search** to display the required error or query you want to view. Select **ALL**, **ERRORS**, **QUERIES** or the required number from the drop-down list. The total number of rows that relate to the selected validation is displayed adjacent to the **Error Search** field.
- By default, when **ALL** is selected from the **Errors Search** drop-down list, the errors are displayed at the top of the list.  
The order of the items in the list can be changed by clicking the appropriate column heading.  
The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.
- View a summary of validation failures by clicking the **Report** button (located above the **Validation Errors Summary** panel, on the left-hand side). The report is displayed in your web browser, from where it can be printed or transferred to another application, if required.

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The report is saved automatically in the **Census Folder** (specified previously via the census browser). The original report, which was generated when the **Create & Validate** button was clicked is also stored in this folder.

- Your generated report file name: Validation Errors Summary.HTML
- Original report file name:  
<LACode><SchoolNumber>\_<SurveyType>\_<LACode><LL><Year>  
\_<SerialNumber>\_ValidationErrorsSummary.HTML

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

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

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

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

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

## Producing Detail Reports

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Producing Detail Reports support article](#).**

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

Each detail report header displays the **Security Message** that was defined in the **Census Return** browser, the **Report Criteria** and the **Total Students** who are listed in the report. Also included in the report header is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date, and the **XML Version**.

Where a student's National Curriculum Year group is different from what their date of birth would suggest, the applicable **YTI** cell is highlighted in yellow.

The reports available for selection may vary depending on your school phase.

### On-Roll Basic Details Report

Report Criteria: Students on-roll on census day.

This report provides basic information about the students, e.g. UPN, ULN, legal surname, legal forename, preferred surname, former surname, date of birth (DOB), gender, year taught in (YTI), date of admission (DOA), enrolment status, ethnicity, language, Youth Support Services Agreement indicator (YSSA), part-time status and boarder status, young carer identified by (parent/guardian, school or not declared).

### Leavers Basic Details Report

Report Criteria: Students not on-roll on census day:

- Leavers with attendance from the start of the Autumn term
- Leavers with exclusions
- Leavers with learner support of Vulnerable Group Bursary Awarded or Discretionary Bursary Awarded
- Leavers with funding and monitoring
- Leavers with alternative provision.

This report provides basic information about leavers, e.g. UPN, ULN, former UPN, legal surname, legal forename, middle names, former surname, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), ethnicity, language, part-time status, boarder status, attendance, exclusions and learner support status.

### Exclusions Report

Report Criteria: Students with exclusions:

- On-roll students and leavers
- Suspensions (excluding lunchtime suspensions)
- Permanent Exclusions with final review.

*NOTE: Permanent exclusions are collected only if a final review exists.*

The following details about students who match the report criteria are displayed: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), exclusion category, reason(s) for exclusion, exclusions start date, number of sessions from which the student was excluded, SEN provision and on-roll status.

*NOTE: Suspension is the new name for a Fixed Term Exclusion.*

### Attendance Report

Report Criteria: Students with attendance one term ago (from the start of the Autumn term).

*NOTE: On-roll and leavers (but not boarders) who were aged four to 15 at 31<sup>st</sup> August.*

The Attendance report provides basic student information about the students who match the report criteria, i.e. UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA) and year taught in (YTI).

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The attendance information included in the report is dependent on whether Attendance/Lesson Monitor is in use.

- Attendance/Lesson Monitor in Use:
  - termly sessions possible
  - on-roll status
  - present codes
  - approved education activity codes
  - attendance codes (divided into authorised and unauthorised sessions)
  - attendance not required codes.
- Attendance/Lesson Monitor Not in Use:
  - sessions possible
  - authorised absence sessions
  - unauthorised absence sessions
  - sessions approved educational activity (AEA)
  - exceptional sessions
  - On Roll Status.

### Absentees Report

Report Criteria: On-roll students and leavers (but not boarders) who have an absence rate of 10% or above, with attendance one term ago, who were aged four to 15 at 31<sup>st</sup> August.

An individual student's overall absence rate is calculated as follows:

$$\text{Overall absence rate} = \frac{\text{Total overall absence sessions}}{\text{Total sessions possible}} \times 100$$

The report provides the following information about the students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), number of sessions possible, session absence (i.e. the number of authorised plus unauthorised absences), on-roll status and enrolment status.

This report can assist with the tracking of absence (particularly persistent absence) and highlights those absences that might need to be tracked.

### SEN Report

Report Criteria: On-roll student with SEN Provision/Status **E** (Education, Health and Care Plan) or **K** (SEN Support).

This report provides a list of students who have special educational needs. Displayed are their UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), SEN provision, SEN type ranking, SEN type, member of SEN unit and member of resourced provision indicator and on-roll status.



## Address Details Report

Report Criteria: Students on-roll on census day.

This report provides a list of students, their UPN, former UPN, legal surname, legal forename, middle name(s), post code, unique property reference number (UPRN), address details and the administrative area/county.

Definition: Unique Property Reference Number (UPRN) is a unique identifier (reference number) that links together related address records across different software programmes. This enables organisations to collate and share information based on a common reference number.

## Free School Meal Eligibility Report

Report Criteria: On-roll students on census day who were eligible for free school meals on or up to census day.

This report provides information on free school meal eligibility for students who match the report criteria: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), free school meal eligibility start date, end date and the UK country in which the eligibility applies, and on-roll status.

*NOTES: This report includes any free school meals recorded outside of England, e.g. Wales.*

*Only Free School Meals records where the country recorded is England or <blank> attract the Pupil Premium.*

## Learner Support Report

Report Criteria: On-roll students and leavers aged 16 plus who have been awarded Vulnerable Group and/or Discretionary Bursary funding.

This report provides information about the applicable students: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI), learner support and on-roll status.

## Top-up Funding Report

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

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and SEN provision.

## Funding and Monitoring Report

Report Criteria: On-roll students and leavers with funding and monitoring information for the collection period.

The report provides the following student details, and funding and monitoring information: UPN, legal surname, legal forename, date of birth (DOB), gender, Year Taught In (YTI), enrolment status, date of leaving (DOL), funding and monitoring (FAM) type, e.g. NLM (National Learning and Monitoring), funding and monitoring (FAM) code, description, cumulative hours and on-roll status.

Funding and Monitoring key to codes:

## 04| Completing the School Census Return

01 = Student in receipt of National Tutoring Programme (NTP)  
21 = Student in receipt of 16 to 19 tuition fund  
22 = Student is repeating up to one year of 16 to 19 funded provision.  
The code(s) displayed in the report vary depending on your school phase.



### Additional Resources:

*Preparing for the School Census Summer 2024 Return guide*

## Post Looked After Arrangements Report

Report Criteria: On-roll students who have post looked after arrangements as at census day.

The report provides the following information about students who have post looked after arrangements: UPN, legal surname, legal forename, date of birth (DOB), gender, year taught in (YTI) and post looked after arrangements, e.g. ceased to be looked after through adoption.

## Class Report

Report Criteria: Classes on the selected period on the reference date.

This report provides the following class information: class name, number of on-roll students in class, number of guests students in class, number of teachers in class, number of support staff in class and the year taught in (YTI).

Displayed at the bottom of this report is the student reconciliation data:

- part-time students not at school
- private study students
- students at another school
- students on work experience
- students at Further Education colleges
- total students not in class at selected period.

## General Report

Where applicable, the General report provides information about:

- the number of free school meals taken on census day.
- all appeals that were made in the academic year 2022/2023 against a refusal to admit a student into the school for the 2023/2024 academic year.
- childcare provisions during the 2023/2024 academic year.

This section of the report displays the following information: childcare type, on site, signposted, opening time, closing time, number of childcare places, provider, other schools and weeks open.

## Alternative Provision Report

Report Criteria: School Arranged Alternative Provision Placements that fall within the Alternative Provision Placement data collection period:

- On-roll
- Leavers.

The report provides the following information: UPN, legal surname, legal forename, date of birth (DOB), gender, Year Taught In (YTI), alternative provision URN, alternative provision UKPRN, alternative provision setting, companies house number, alternative provision postcode, alternative provision reason, start date, SEN on start date, end date, SEN on end date, alternative provision attendance, alternative provision sessions and on-roll status.

## Permanent Exclusions without Final Review Report

Report Criteria: On-roll students and leavers with permanent exclusions and without a final review.

*NOTE: The date range for this report does not match the collection dates for the school census. This is intentional to enable all instances of permanent exclusions without final review to be checked.*

This report details permanent exclusions that do not have a final review and will not be included in the census, either because the exclusion process is still ongoing or because the school has not recorded the final review result. The report has been provided to assist schools in checking whether details have been recorded accurately.

The following information is included in the report: UPN, legal surname, legal forename, date of birth (DOB), gender, date of admission (DOA), date of leaving (DOL), reason for exclusion, exclusion start date, SEN expert requested (Yes/No) and on-roll status.

## Generating Detail Reports

### Selecting a Single Detail Report

Select the required report from the **Detail Report** drop-down list located at the top of the **Census Return Details** page. The selected report is generated automatically.

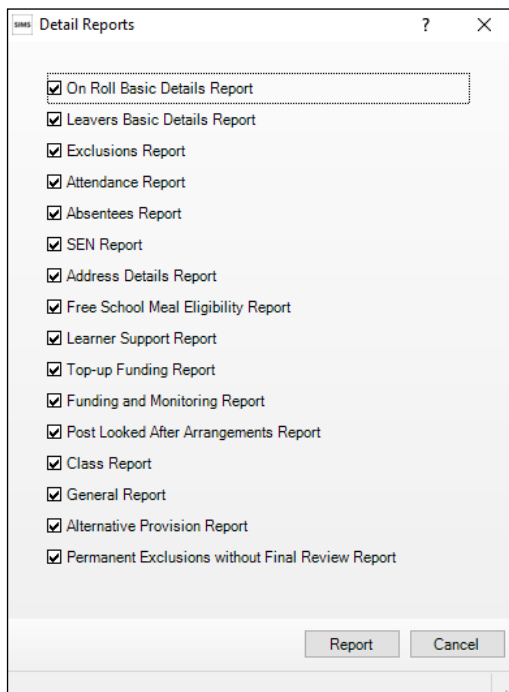
*NOTE: The contents of the graphics are examples only of what you might expect to see when using SIMS to produce the School Census Return.*

The screenshot shows the 'Census Return Details - Spring 2023 Term : School Census Spring 2023' interface. The 'Detail Report' dropdown menu is open, displaying a list of report options. The 'Permanent Exclusions without Final Review Report' is highlighted. Other visible options include 'On Roll Basic Details Report', 'Leavers Basic Details Report', 'Exclusions Report', 'Attendance Report', 'Absentees Report', 'SEN Report', 'Address Details Report', 'Free School Meal Eligibility Report', 'Learner Support Report', 'Top-up Funding Report', 'Funding and Monitoring Report', 'Post Looked After Arrangements Report', 'Class Report', 'General Report', and 'Alternative Provision Report'. A 'Multiple Reports...' option is also visible at the bottom of the menu. The background shows the 'Census Details' section with fields for Census Date (19/01/2023), Description (School Census Spring 2023), and various collection dates for Attendance, Exclusions, AP Placements, FAM, and FSM.

### Selecting Multiple Detail Reports

1. Select **Multiple reports** from the bottom of the **Detail Report** drop-down list to display the **Detail Reports** dialog. By default, all detail reports are selected.

The reports that are available may vary according to your school phase.



2. If any reports are not required, deselect the associated check box.
3. Click the **Report** button to generate the selected reports.

The report(s) are displayed in your web browser, from where the data can be transferred to a spreadsheet, if required.

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

The report is saved with a filename that consists of the following data fields separated by underscores ('\_'):

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

For example:

```
8234321_SC1_823LL23_001_onroll_basic_details_report.html.
```



#### More Information:

*Configuring the Census Folder on page 12*

## Printing a Report from your Web Browser

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Printing a Report from your Web Browser support article](#).**

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

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

## Deleting Temporary Web Browser Files

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Deleting Temporary Web Browser Files support article](#).**

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

This prevents the information, e.g. copies of web pages that are stored in the local cache for faster viewing, remaining on the hard disk of the device in the temporary directory, where it is not secure.

When this process is performed, all temporary files (including any Statutory Returns reports files) that the browser has cached are deleted.

To clear the cache, open your web browser, then clear the browsing data history. For more information, please refer to the documentation applicable to the web browser you are using.

## Producing the Summary Report

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Producing the Summary Report support article](#).**

The Summary report enables the school staff, who are involved in the return's preparation, to assess the accuracy and completeness of the return data. It should then be passed to the Head Teacher for their review.

*NOTE: When the return is authorised, the Summary report is automatically generated and displayed in your web browser.*

## Generating the Summary Report

Click the **Summary** button, located at the top of the **Census Return Details** page, to display the report in your default web browser.

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

The report is saved with a filename that consists of the following data fields separated by underscores ('\_'):

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

For example: 8234321\_SC1\_820LL23\_001\_Summary\_Report.html.

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



**More Information:**

*Configuring the Census Folder on page 12*

*Generating Detail Reports on page 47*

*Authorising the Return on page 51*

*Deleting an Unauthorised Return on page 55*

## Editing an Unauthorised Return

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Editing an Unauthorised Return support article](#).**

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

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

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



### More Information:

*Configuring the Census Folder on page 12*

*Specifying the Security Message for Reports on page 13*

*Resolving Validation Errors and Checking Queries on page 40*

*Producing Detail Reports on page 42*

*Producing the Summary Report on page 49*

## Authorising the Return

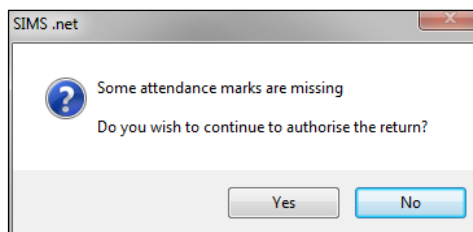
**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Authorising the Return support article](#).**

A return must be authorised before it can be submitted to your Local Authority or uploaded to the DfE COLLECT data collection website (as applicable to your school). If you authorise a return and subsequently need to make amendments, you must either make a copy of the return and work on the copy or create a new return.

Before authorising the return, you should ensure that all the information displayed on the **Census Return Details** page is correct and does not require further editing. This is because it is not possible to edit details after the return is authorised. The content of the Summary report can be useful when reviewing the information.

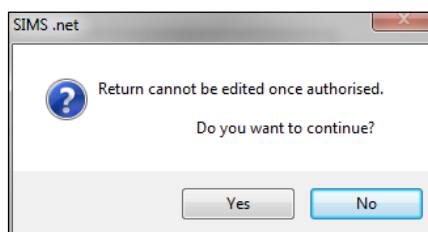
1. Click the **Authorise** button.

If missing marks exist, the following message is displayed.



2. Click the **Yes** button to continue with the authorisation process or the **No** button if you want to return to SIMS where the missing marks can be entered.

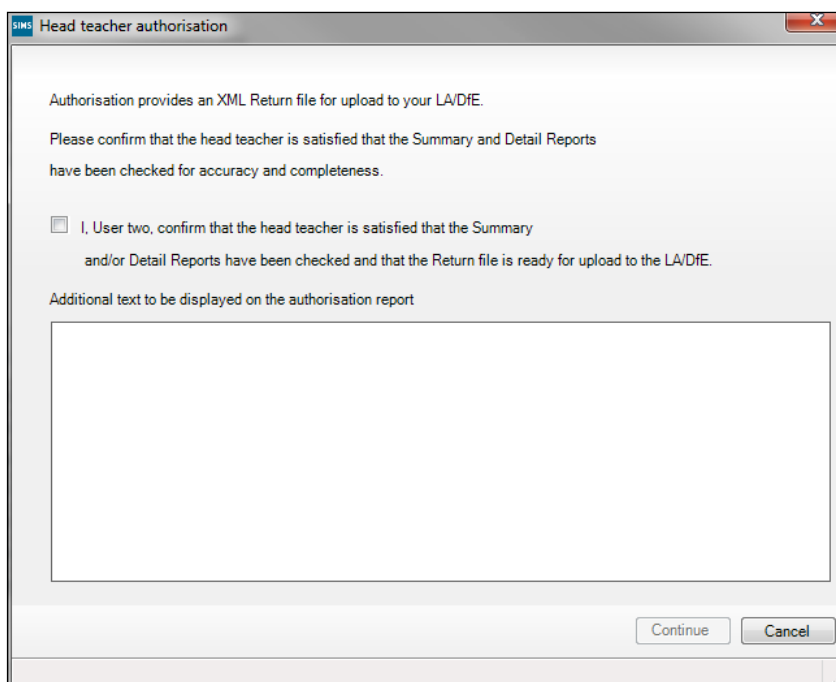
If you choose to continue, a message reminds you that the return cannot be edited once it is authorised.



3. Click the **Yes** button to continue or the **No** button to return to SIMS where edits can be made to the data before authorising.

#### 04| Completing the School Census Return

If you choose to continue, the **Head teacher authorisation** dialog is displayed.



4. Enter any additional text to be displayed on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.
5. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.  
When the confirmation check box is selected, the **Continue** button is activated enabling you to complete the authorisation process.
6. Click the **Continue** button to authorise the return and prompt the following actions:
  - The return file extension changes automatically from UNA (unauthorised) to XML (authorised).
  - The Summary report, Authorisation report and Validation Errors Summary report are generated automatically and displayed in your web browser, from where they can be printed, if required.

All reports (including detail reports) and the XML file are saved in the **Census Folder**, which was specified previously in the **Census Return for Summer 2024 Term** browser.

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

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



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

After the return is authorised, reports based on cohorts can be created (via **Reports | Design Reports**), so that items collected in the return can be tracked. Provided that **Student** has been selected as the data area, the Statutory Returns sub-report is available for selection when specifying the fields to be included in the report (the last node).



#### Additional Resources:

*Designing and Running Reports* handbook



#### More Information:

*Producing the Summary Report* on page 49

*Retrieving Authorised Census Return Files* on page 53

*Copying a Return* on page 54

## Submitting the Return

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Submitting the Return support article](#).**

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

Guidance about how Local Authorities, schools and academies should submit the census data is available on the GOV.UK website (<https://www.gov.uk/guidance/school-census>).

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

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

## Retrieving Authorised Census Return Files

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Retrieving Authorised Census Return Files support article](#).**

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

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

## 04| Completing the School Census Return

2. Select the type of census required from the **Return Type** drop-down list to display a list of previous returns that match the selected criteria.
3. By default, the **Download to** field displays the folder specified previously in the **Census Return** browser. To specify a different folder:
  - a. Click the **Select a folder** button (...) to display the **Browse For Folder** dialog. Navigate to the location of the required folder then highlight it. If a suitable folder does not exist, click the **Make New Folder** button then enter a suitable folder name.

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

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

- b. Click the **OK** button to select or create the folder and then return to the **Retrieve Authorised Return Files for <census name>** page, where the chosen folder name is displayed in the **Download to** field.
4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

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

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

If you want to create reports based on cohorts, so that items collected in the return can be tracked, a sub-report is available (via **Reports | Design Reports**).

The **Statutory Returns** sub-report is available for selection only if **Student** has been selected as the Data Area.

When you **Select fields to be included in the report**, the **Statutory Returns** sub-report is located at the bottom of the list (the last node). Three options are available for selection under this sub-report: **Authorised Date**, **File Name** and **Return Description**.



### Additional Resources:

*Designing and Running Reports* handbook

## Copying a Return

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Copying a Return support article](#).**

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

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

*NOTE: Ensure that the return you wish to replicate is not open at the time of copying.*

1. Select **Routines | Statutory Returns | School Census** to display the census browser.
2. Click the **Search** button to ensure that the list of returns is displayed.
3. Highlight the file you want to copy then click the **Copy** button.

A message prompts for confirmation that you wish to make a copy of the selected return.

**IMPORTANT NOTE:** Any values for Early Years, Top-up Funding, Post Looked After Arrangements, Funding and Monitoring, and Attendance (where applicable), will not be copied but will be populated from the current values held in the database.

*The Create & Validate routine must be run to generate a new census file.*

4. Click the **Yes** button to make the copy, which is then displayed in the browser as:  
Copy of <description of selected file>.
5. To rename the copied return, highlight it, then click the **Open** button to display the **Census Return Details** page.
6. In the **Census Details** panel, edit the **Description** then click the **Save** button.

**IMPORTANT NOTE:** A unique description must be used for each return. If duplicate returns are detected, an error message is displayed.

## Deleting an Unauthorised Return

**For more up-to-date guidance, including the latest information and enhancements, please refer to the [Deleting an Unauthorised Return support article](#).**

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

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

**IMPORTANT NOTES:** *When a return file is deleted, any associated files, e.g. Validation Errors Summary, detail reports, etc. that have been produced are also deleted.*

*Any return files that have already been authorised cannot be deleted.*

1. Select **Routines | Statutory Returns | School Census** to display the browser.
2. Click the **Search** button to ensure that the list of return files is displayed.
3. Highlight the return file to be deleted, then click the **Delete** button. A message prompts for confirmation that the selected return should be deleted.
4. Click the **Yes** button to permanently delete the selected return file and all associated report files.

The selected return file and associated reports are removed from the browser and the storage folder.

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