SIMS

helping schools inspire

SIMS Admissions Code of Practice Non-Own Admissions Authority Schools in England

Applicable to 7.172 onwards

Revision History

Version	Change Description	Date
7.172 - 1.0	Initial release.	13/10/2016

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Providing Feedback on Documentation

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

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

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*01 /*Getting Started with Admissions

Introduction

The Admissions Code of Practice applies to the admissions process for maintained Primary and Secondary schools.

Under this system, parents submit an application form (the School Application Form) to their local LA, listing their preferred schools for their child's education. Supporting reasons can be given to indicate why they feel their child's attendance at a particular school would be more beneficial than their attendance elsewhere.

In co-operation with other Admission Authorities, the LA is responsible for processing all the submitted preferences and for ensuring that each applicant is issued with a single offer of a school place. Parents are then advised of this offer.

This handbook provides information on the steps necessary to record admissions in Non-Own Admissions Authority Schools in England.

These processes are applicable to Primary and Secondary schools in England. They are not applicable to schools with a Sixth Form, schools in Wales and schools in Northern Ireland.

The ADT, ASL and ATF files are compiled in XML format in accordance with the published requirements from the DfE.

> **IMPORTANT NOTES:** *Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.*
>
> *You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a Server. The DfE recommends ISO27001 as the standard for information security (http://www.itgovernance.co.uk/bs7799.aspx), a copy of which can be found at. If you are in any doubt, consult with your IT Security Officer before proceeding.*
>
> *Please ensure that you use <u>either</u> CTF <u>or</u> ATF files to import pupil/students into SIMS. Using both methods may produce duplicate entries.*

What's New in This Release?

The following change has been made in this release.

Updated ATF Version

Applicable to Maintained schools in England only

Routines | Admission | Import ATF File

It is now possible to import version 12.0 or 13.0 ATF files.

Additional Information Included in an ATF Import

Applicable to Maintained schools in England only

Routines | Admission | Import ATF File

Country of Birth, **Proficiency in English** and **Nationality** information is now included in an ATF import.

Additional Information Included in Applicant Details

Applicable to schools in England and Wales only

Focus | Admission | Application

It is now possible to view and edit the **Country of Birth** of an applicant.

Schools in England can now view and edit **Proficiency in English** information of an applicant.

Permissions for SIMS

When running SIMS, you should use the login name and password assigned to you by the System Manager. Your login details are set up using SIMS System Manager.

A set of default permissions is supplied with System Manager. This includes various user groups to which users can be assigned.

Users should be allocated membership to one or more of these groups in order to access and use the various areas of SIMS. The permissions available within these groups can be edited as required and it is also possible to add new groups to which a bespoke set of permissions can be added.

For more information on setting user permissions, please refer to the *Managing SIMS Users, Groups and Databases* handbook. All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category, then click the required handbook from the **Handbooks** page.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (https://myaccount.capita-cs.co.uk). To find the spreadsheet, search for `<sims version> sims permissions spreadsheet`, e.g. `7.172 sims permissions spreadsheet`.

Note for Primary Schools with Nursery Classes

Schools that receive an ATF file may encounter applicants in the file who are already members of the school, e.g. they are enrolled in a Nursery class. These applicants <u>can</u> be imported as new applicants but prior to admitting them, the Admissions Officer is required to record these children as leavers from the Nursery class. For further information on recording leavers, please refer to the *Managing Pupil/Students* handbook.

Note for Schools with Sixth Form Intakes

Sixth Form intakes are not covered by the Codes of Practice in the same way as years Reception – Year 11. As a result, there are no Admissions Data Transfer (ADT) files available from the LA for these intakes.

Schools must first create intake and admission group combinations then enter applicants manually from any application forms that may have been received for these intakes. The **Finalise Offers** page can be used to offer places to these applicants.

When the applicants have accepted the offer of a place, they can be accepted and admitted in the usual way.

Setting up Admissions

Before starting the Admissions process in SIMS, it is important to set up the system defaults.

1. Select **Tools | Admissions | Defaults** to display the **Setup Details** page.

2. Amend the **Admission No. Prefix** and **Admission No. Suffix** values, if required. The prefix can be either a letter or a number between 0-9 that enables you to identify a year's admission intake easily. The prefix defaults to zero.

3. Specify whether or not you use multiple admission groups by selecting the **Multiple Admission Groups** check box, if required. Selecting the check box enables you to organise admissions by splitting the intake groups across the terms of the academic year. Additional admission groups can be set up only if this check box is selected. If this check box is deselected, SIMS creates a single admission group and associates it with the newly created intake group.

   The **Next Enquiry Reference** field is not relevant for Own Admission Authority Basic Licence users and should be ignored.

4. Select the **Record Withdrawal Information** check box if you want to record when pupil/students, who have previously applied to attend your school but have subsequently gone elsewhere, withdraw their application.

5. The **Enter Defaults On Admit** check box enables schools to save data on an applicant's record without entering dates, e.g. Free School Meal period. When the applicant is finally admitted, SIMS generates the dates providing the **Enter Defaults On Admit** check box is selected.

6. Select the **Tier 4 Applications** check box if you wish to record this information. Once this has been selected, a Tier 4 Application record can be created and the **CAS Reference** (Confirmation of Acceptance for Studies) can be recorded via the **Application** page (**Focus | Admission | Application**).

   Only schools that accept foreign nationals (requiring a VISA) as pupil/students need to manage these applications. This functionality assists schools in tracking this type of application. Schools can decide whether or not the fields associated with Tier 4 applications are displayed.

7.   Click the **Save** button to save the details.

Additional Resources:

Recording Tier 4 Application Information and *Completing Registration Information* in the *Managing Applications to your School* chapter of the *Managing Pupil/Students* handbook

02|Adding Intake Groups and Admission Groups

Adding Intake Groups

Before importing applicants, it is essential that intake and admission group combinations have been set up for the forthcoming academic year. For schools that will be importing ADT files, the creation of a new admission group or intake group into which these files can be imported is essential. Intake and admission groups can be set up in advance for future academic years.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

   It is possible to search for the required intake group by selecting the **Status** from the drop-down list. This enables users to search for inactive intake groups as well as currently available groups. It is also possible to delete intake groups from the browser but it is only possible to delete groups where all the applications have already been dealt with. By setting an intake group as inactive rather than deleting the group, SIMS retains a history of the applications for a particular intake.

2. After searching for an existing intake group to ensure that the details have not already been added, click the **New** button to display the **Intake Group Details** page.

3. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates from the drop-down list. The admission year defaults to the current academic year but can be changed, if required.

4. Select the **Admission Season** from the drop-down list, enabling you to associate a specific term with the intake group.

5. Select the appropriate **Year Group** from the drop-down list. Many schools maintain several lists of applications for different year groups.

6. Enter a numeric value for the **Planned Admission**. This represents the maximum number of new pupil/students who can be admitted for this intake group and is generally abbreviated to PAN (Planned Admission Number).

    The **Name** field is created automatically from a combination of the admission year, admission season and the year group specified. The name can be changed by overtyping the default text.

    The **Active** check box is selected by default, indicating that the intake group is available for use immediately. Once the applications for a particular intake group have been dealt with, schools can mark the intake group as inactive to prevent it from being displayed in the **Find Intake Group** browser.

7. Click the **Save** button to save the intake group details.

    SIMS validates that the name for the new intake group is unique and that an admission year, admission season, year group and PAN have been specified. Schools are required to set up additional admission groups only if the **Multiple Admission Group** check box is selected on the **Setup Details** page (via **Tools | Admissions | Defaults**). If this check box is not selected, SIMS creates a single admission group and associates it with the newly created intake group.

Adding Admission Groups

Schools are required to set up additional admission groups only if the **Multiple Admission Group** check box is selected on the **Setup Details** page (via **Tools | Admissions | Defaults**). If this check box is not selected, SIMS creates a single admission group and associates it with the newly created intake group. The following section is relevant only if you are recording multiple admission groups.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

2. Enter all or part of the group **Name** or select the appropriate search criteria from the drop-down lists then click the **Search** button to display all intake groups that match the search criteria entered.

3. Highlight the required intake group then click the **Open** button to display the **Intake Group Details** page.

4. Click the **New** button in the **Admission Groups** panel to display the **Add Admission Group** dialog or highlight an existing admission group then click the **Open** button to display the **Edit Admission Group** dialog.

5. Enter a unique **Name** for the admission group.

6. Specify the **Date Of Admission** by clicking the **Calendar** button then selecting the required date. Admission groups are generally set up in advance of the expected intake for the forthcoming academic year. It is possible however, to specify the **Date Of Admission** as a date in the past. The date of admission specified must fall within the admissions year selected when the intake group was defined.

7. Click the **OK** button to return to the **Intake Group Details** page.

Deleting Admission Groups

The following section is relevant only if you are recording multiple admission groups.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

2. Enter all or part of the group **Name** or select the appropriate search criteria from the drop-down lists then click the **Search** button to display all intake groups that match the search criteria entered.

3. Highlight the required intake group then click the **Open** button to display the **Intake Group Details** page.

4. In the **Admission Groups** panel, highlight the group you wish to delete then click the **Delete** button.

5. Click the **Save** button.

03/ Importing Admissions Transfer Files, Accepting Applications and Admitting Applicants

Importing an Admissions Transfer File (ATF)

In March, schools receive an Admissions Transfer File (ATF) from their LA. This file contains the names of applicants who have been offered a place at your school for the following September, together with additional basic applicant information. Once the ATF has been imported into SIMS and applicants have been accepted, the curriculum planning process can be started.

> *NOTES: Before proceeding, please ensure that you have received an ATF from the LA and that it is stored in an accessible location.*
>
> *An intake group and admission group combination must also have been defined, into which applicants can be imported.*

1. Select **Routines | Admission | Import ATF File** to display the **Import ATF File** wizard.
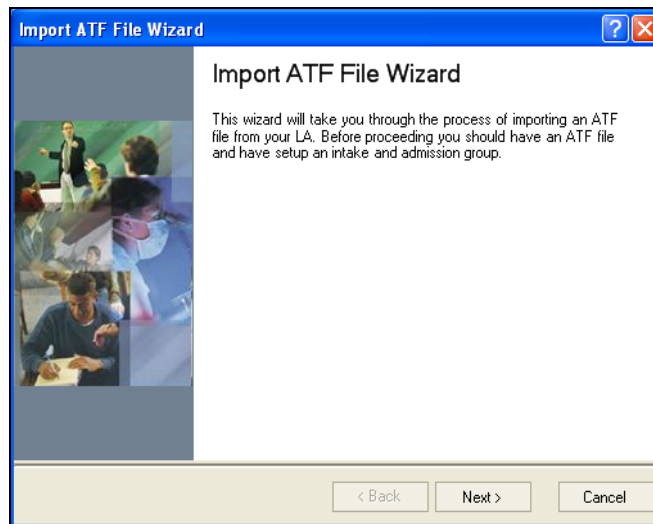
2. Click the **Next** button to continue.
3. Click the **Browse** button to display the **Open** dialog.
4. Navigate to the location of the stored ATF, highlight it then click the **Open** button.
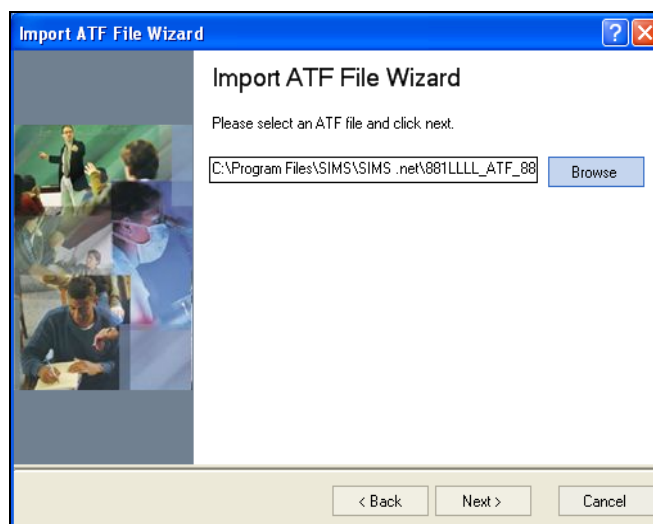
5. Click the **Next** button to validate applicant addresses in the ATF.

The **House Number** and **House Name** of an address are held in a single field of the XML file structure. This field is called a **PAON** (Primary Addressable Object Name).

This page is displayed only if the ATF contains addresses with incorrectly formatted PAON fields and enables you to correct the address details to prevent SIMS from rejecting the address.

The **Hide Best Guess** check box is selected by default.

Addresses that can be reconciled without user intervention are not displayed. The only addresses displayed in the lower section of the page are those that cannot be resolved automatically. These addresses can be corrected by clicking either the **House Number** or **House Name** field then entering the correct information manually. Alternatively, address details can be discarded and therefore not imported by selecting the **Discard** check box adjacent to the relevant entry.

If a large number of addresses require correction during import, you should request a correctly structured ATF from the LA.

6. After correcting or discarding incorrect addresses, click the **Next** button to continue.

7. Select the required **Intake Group** from the drop-down list.

SIMS checks that the details contained in the ATF file header correspond with the details of the intake group into which the file is being imported. All admission groups associated with this intake group are displayed in the panel at the bottom of the wizard.

8. Highlight the required **Admission Group** then click the **Next** button to import the ATF. A progress bar is displayed.

Schools that have started to enter manually the details of next year's applicants may encounter some duplicate applicants when importing the ATF. To reduce the risk of duplicate applicants, SIMS checks the information in the ATF against existing applicant details. Any details that match based on surname and forename are displayed.

> *NOTE: These details require investigation to determine whether they are new applicants or duplicates of existing, manually entered applications.*

Application Reference Numbers (ARNs) play a key role in the matching of applications. Applicants who have been entered manually in SIMS are not issued with an ARN. ARNs are created as part of the LA process and applicants contained in the ATF have been given their own unique number, which is imported into SIMS with the rest of their details. These applicants are not displayed on this page.

- If an applicant in the ATF is a match for an existing applicant, select the **Update Application** check box. This updates the existing application and adds the applicant's ARN to their current record.
- If an applicant in the ATF is a match for an existing applicant in SIMS, where their application was originally from another admissions year or they are currently an existing pupil in the Nursery year, select the **New Application** check box. For example, an applicant applied to join the school for the Nursery year in September 2012 but their application was unsuccessful, so they have now applied to join the Reception year in September 2013. These applicants are created as new applications.

▪ If an applicant in the ATF is a completely new applicant and is not the same as the individual found by SIMS, select the **New person** check box to record a new person and a new application.

View all the fields in the panel using the scroll bar to move backwards and forwards across the page.

9. Click the **Next** button to continue.

SIMS also checks for **Contact** matches, e.g. any applicant in the incoming ATF who shares a contact who is already present in the system.

▪ If any of the contacts listed on the following page of the wizard prove to be a match for an existing contact, select the **Matches** check box adjacent to the correct **Name**.

▪ If any of the contacts listed on the following page of the wizard prove to be a new contact, select the **Matches** check box adjacent to the `New person` record in the **Name** column.

10. Once you have dealt with each contact, click the **Next** button to continue.
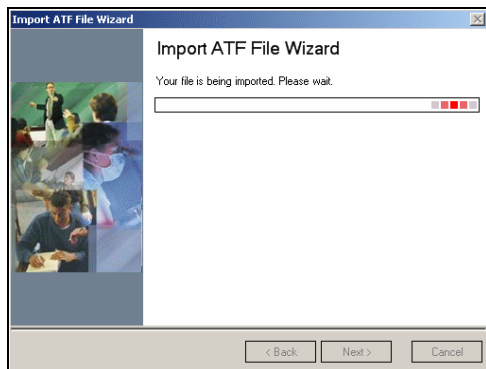
When the import is complete, the **Number of applications in file**, the **Number of applications processed** and the **Number of new applications** are displayed.
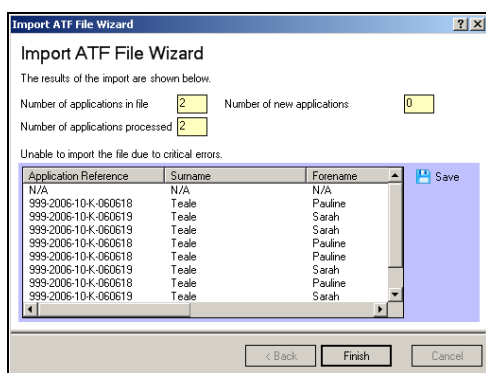
Applicants are imported with a status of **Offered** and their details can be viewed and updated by clicking the **Application** icon on the toolbar or selecting **Focus | Admission | Application**. Warnings or errors in the ATF import are listed, as shown in the previous graphic.

It is possible to **Save** or **Print** these details by clicking the appropriate button on the right-hand side of the page.

- To save the details of the ATF import, click the **Save** button to display the **Save As** dialog.
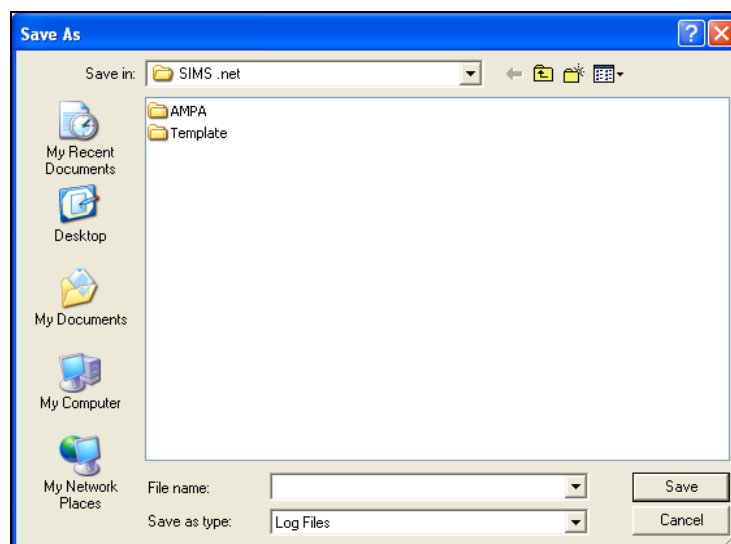
Navigate to or create a local folder in an appropriate location, enter a **File name** then click the **Save** button.

> *IMPORTANT NOTE: The log file may contain confidential information about the applicants so give careful consideration to where you store these files.*

- To print the details of the ATF import, click the **Print** button to display the **Run a Screen Based Report** dialog.
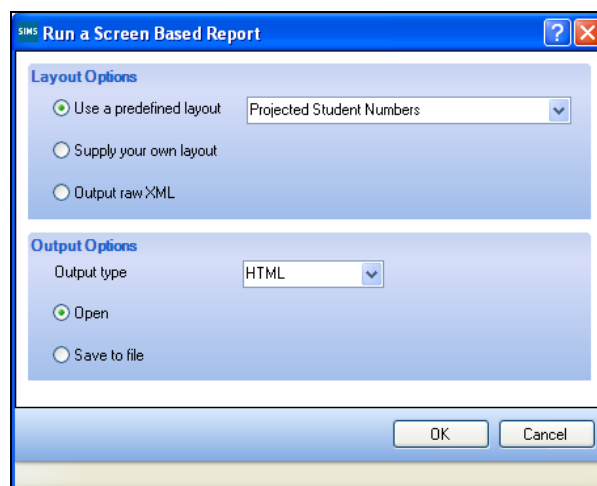
- Select the **Output to a web browser** check box then click the **OK** button to display the report in your web browser. The report can be printed by clicking the **Print** button.

Additional information about the applicants can be obtained by producing individual Data Collection Sheets and sending them to the applicant's parent/guardians for completion and return. Data Collection Sheets can be produced via **Reports | Run | Focus | Application** or individually by clicking the **Reports** hyperlink in the **Links** panel.

11. Click the **Finish** button to close the wizard.

> *NOTE: For schools that use the Enquiries functionality, when an ATF file that contains applicants who were originally recorded as enquirers is imported, the application is linked to the enquiry, and the enquiry is marked as complete and inactive. This enables you to produce accurate marketing and/or conversion reports.*

Transferring Admission Group Members

All applications received by a school must be associated with an intake and admission group. The intake and admission groups define the intended date of admission and the year group for each individual application.

Occasionally, it may be necessary to associate applications with an alternative intake and/or admission group. This may be because of oversubscription to an intake and/or admission group, or because the application was originally placed in the wrong intake or admission group.

1. Select **Routines | Admission | Admission Groups | Transfer Applications** to display the **Transfer Admission Group Members** page.

2. On the left-hand side of the **Members** panel, select the **Intake Group** and **Admission Group** from which you want to transfer members from the drop-down lists. Only admission groups that have been associated with the selected intake group are available for selection.

   All the applications that are currently associated with this intake/admission group combination are displayed in the panel on the left-hand side of the grid.

3. On the right-hand side of the **Members** panel, select the **Intake Group** and **Admission Group** to which you want to transfer members from the drop-down lists. Only admission groups that have been associated with the selected intake group are available for selection.

   All the applications that are currently associated with this intake/admission group combination are displayed in the panel on the right-hand side of the grid. If you have inadvertently selected the same intake/admission group combination on both sides of the screen, a warning message is displayed in the Status Bar advising that it is not possible to transfer members.

   > *NOTE: If you would like to keep a record of the original allocations, click the **Print** button before continuing.*

4. Highlight the applications you wish to transfer then click the **Forward** and **Backward** buttons to move the applications. Applications can be selected individually or in multiples by using the **Ctrl & Click** or **Shift & Click**.

5. Click the **Save** button to save the transferred applications.

Finalising Offers for Sixth Form Classes

The **Finalise Offers** page should be used for Sixth Form intakes to make offers to its applicants.

1. Select **Routines | Admission | Finalise Offers** to display the **Find Intake Group** browser.

2. Search for the required intake group, highlight it then click the **Open** button to display the **Finalise Offers** page.

The **Summary** panel displays the current statistical information relating to the selected intake group.

- **Planned Admission** – indicates the original number of applications intended for this group (the PAN).
- **Total Applicants** – indicates the number of applications that have already been received and provisionally assigned to this intake group.
- **Applied** – indicates the number of applicants who have already applied for a place in this intake group.
- **Offered** – indicates the total number of places within this intake group that have already been offered to applicants.
- **Accepted** – indicates the number of applicants who have accepted their offered place.
- **Withdrawn** – indicates the number of applications that have been withdrawn from this intake group.
- **Admitted** – indicates the number of applicants who have already been admitted from this intake group.
- **Rejected** – indicates the number of applicants who have been rejected from this intake group.

The **Applications** panel displays the applications, together with the applicant **Name**, **Gender**, **DOB** and their current **Application Status**.

3. Work through the list of applications, offering places and rejecting applicants where appropriate. The figures in the **Offered** and **Rejected** fields in the **Summary** panel are updated each time the information is saved.
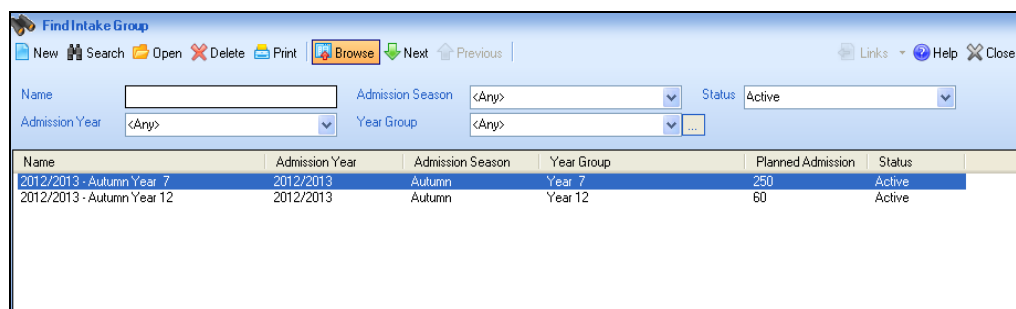
    The coloured markers on the far left-hand side of the grid indicate the following for each application.

    ▪   **Green** - that the applicant will be offered a place

    ▪   **Orange** - that the applicant could possibly be offered a place

    ▪   **Red** - that the applicant will not be offered a place.

4. Click the **Save** button to save the allocations.

5. Click the **Print** button to print the allocations.

Accepting and Declining Applications

When an acceptance notice is received from an applicant to whom you have offered a place, the application status should be updated. Only applications with a status of **Accepted** or **Admitted** are available when planning registers and detailed timetables.

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.

2. Search for the required intake group, highlight it then click the **Open** button to display the **Accept/Decline Applications** page.

The **Summary** panel displays the current statistical information relating to the selected intake group.

- **Planned Admission** – indicates the original number of applications intended for this group (the PAN).

- **Total Applicants** – indicates the number of applications that have already been received and provisionally assigned to this intake group.

- **Applied** – indicates the number of applicants who have already applied for a place in this intake group.

- **Offered** – indicates the total number of places within this intake group that have already been offered to applicants.

- **Accepted** – indicates the number of applicants who have accepted their offered place.

- **Withdrawn** – indicates the number of applications that have been withdrawn from this intake group.

- **Rejected** – indicates the number of applicants who have been rejected from this intake group.

- **Admitted** – indicates the number of applicants who have already been admitted from this intake group.

Clicking the chevron button minimises the **Summary** panel, enabling more space on the screen for the **Applications** grid.

The **Applications** panel enables you to change the **Current Application Status** of the applications displayed in the grid. Select the required status from the drop-down list to change the selection of applications displayed.

The grid displays the applications, together with the applicant **Name**, **Gender**, **DOB** and their current **Application Status**. It is possible to change the order in which the applicants are displayed in the grid by clicking any of the four column headings.

There are five additional columns, **Offered**, **Accepted**, **Withdrawal**, **Withdrawal Reason** and **Destination School**. The last two columns are available only if the **Record Withdrawal Information** check box is selected on the **Setup Details** page (via **Tools | Admissions | Defaults**).

Work through the list of applications, marking each applicant appropriately by clicking the relevant cell.

Any changes made to an applicant's **Current Application Status** are updated only when you click the **Save** button. The figures in the **Summary** panel are updated each time the information is saved. SIMS validates that the total number of applicants who have been accepted or admitted from this intake group does not exceed the planned admission number (PAN) for the intake group.

3. Click the **Save** button to save the changes.

Withdrawing Applications

It is possible to mark an applicant as **Withdrawn** if they eventually decide not to attend your school, perhaps because the family have moved out of the area. To ensure that your records are maintained correctly, it is advisable to remove these applicants as soon as the outcome of their application is known.

In addition to the following process, it is also possible to withdraw applicants individually via the application record (**Focus | Admission | Application**).

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.

2. Search for the required intake group, highlight it then click the **Open** button to display the **Accept/Decline Applications** page.

   All the applicants who have been allocated to this intake group are displayed in the **Applications** panel.

3. Work through the list of applications, offering places and rejecting applicants where appropriate. The figures in the **Summary** panel are updated each time the information is saved.

4. For each applicant who is marked as withdrawn, a **Withdrawal Reason** should be selected from the drop-down list to indicate why the applicant will not be attending your school.

5. Click the **Destination School** cell then click the **Browse** button to display the **Schools Browse** dialog.
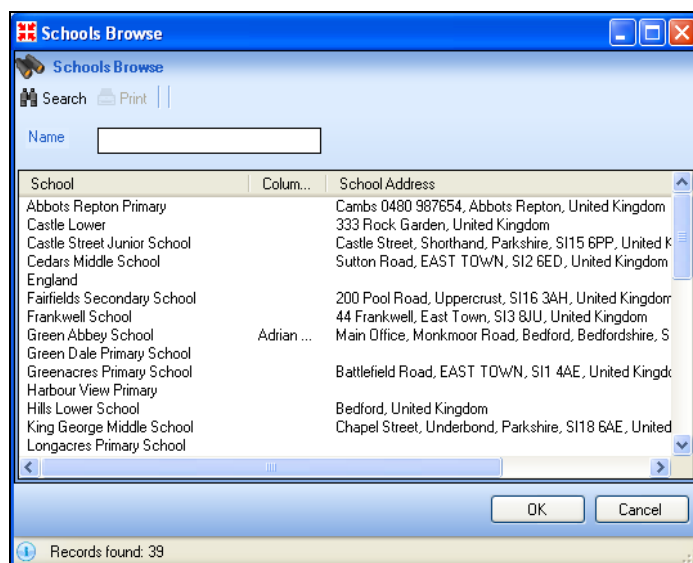
6. Enter the required school **Name** then click the **Search** button to display a list of schools that match the search criteria entered.

7. Highlight the required school then click the **OK** button to return to the **Accept/Decline Applications** page.

8. Click the **Save** button to save the changes.

Admitting Applications

It is possible to admit applicants only when a place has been offered and the place has been accepted. Applicants should be admitted only when you are certain that they will be attending your school.

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.
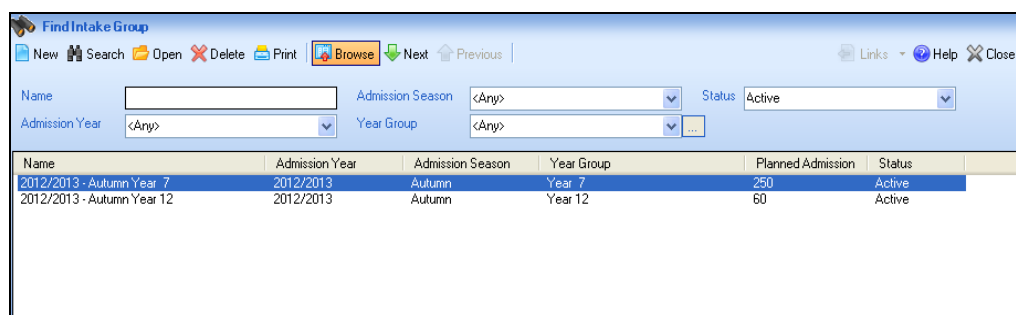
2. Enter all or part of the intake group **Name** or select the appropriate options from the drop-down lists then click the **Search** button to display all intake groups that match the search criteria entered. Alternatively, click the **Search** button without entering or selecting search criteria to display all intake groups.

3. Highlight the required intake group then click the **Open** button to display the **Admit Applicant Detail** page.

The **Summary** panel displays the current statistical information relating to the selected intake group.

- **Total Applicants** – indicates the number of applications that have already been received and provisionally assigned to this intake group.

- **Planned Admission** – indicates the original number of applications intended for this group (the PAN).

- **Applied** – indicates the number of applicants who have already applied for a place in this intake group.

- **Offered** – indicates the total number of places within this intake group that have already been offered to applicants.

- **Accepted** – indicates the number of applicants who have accepted their offered place.

- **Withdrawn** – indicates the number of applications that have been withdrawn from this intake group.

- **Rejected** – indicates the number of applicants who have been rejected from this intake group.

- **Admitted** – indicates the number of applicants who have already been admitted from this intake group.

Clicking the chevron button minimises the **Summary** panel, enabling more space on the screen for the **Applications** grid.

The **Applications** panel enables you to change the **Application Status** of the applications displayed in the grid. Select the required status from the drop-down list to change the selection of applications displayed.

The grid displays the applications, together with the applicant **Name**, **Gender**, **Date Of Birth**, **Date of Admission**, **Enrolment Status**, their current **Application Status** and their **UPN**.

The **Assign UPN** column can be edited. If an applicant does not have an existing UPN, click this cell, select the appropriate action from the drop-down list then click the **Save** button. Alternatively, click the **Assign Permanent UPN** button to assign UPNs to all the applicants in the grid. Permanent UPNs are issued to applicants only when it is believed that they have never been allocated a UPN, or to replace a temporary UPN.

There are several additional columns, including **Admitted**, **Withdrawal**, **Withdrawal Reason** and **Destination School**. The last two columns are available only if the **Record Withdrawal Information** check box is selected on the **Setup Details** page (via **Tools | Admissions | Defaults**).

Work through the list of applications, marking each applicant appropriately by clicking the relevant cell. Clicking the **Admit All** button selects the **Admitted** cell for each applicant in the **Applications** grid.

Any changes to an applicant's current **Application Status** are updated when the record is saved. The figures in the **Summary** panel are updated each time the information is saved.

4. Click the **Save** button to save the details and update the information in the **Summary** panel.

Re-admitting Pupil/Students

It is sometimes necessary to re-admit pupil/students because they have left, they have joined the school mid-term or they have disappeared from view because their **Date of Admission** was a date in the future.

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

2. Click the **New** button to display the **Add Pupil** (or **Student**) page. Enter any known details of the required pupil/student in the **Basic Details** panel to facilitate the search.

3. Click the **Continue** button to display the **Matched People** panel, which displays all the people who match the search criteria entered.

4. Highlight the required pupil/student then click the **Open** button to display the following warning message.

   The selected pupil/student is a Leaver, do you want to re-admit the pupil/student?

5. Click the **Yes** button if you are certain that this is the pupil/student who should be re-admitted to display the pupil/student's details on the **Pupil** (or **Student**) **Details** page.

6. Click the **Save** button to highlight the mandatory fields that must be completed before you can save the details. These include the **Registration Group**, **Year Group**, **Year Taught In**, **Enrolment Status** and **Admission Date** fields.

7. Click the **Save** button when all the required information has been entered.

Deleting an Application

Schools may require the ability to delete one or more applications for a number of reasons.

- An application may have been entered in error.

- Applicants may have been offered a place but decided not to attend your school. Maintained schools may want to delete these applications in late September once it is clear that these applicants are not going to arrive at your school.

1. Click the **Application** button on the toolbar or select **Focus | Admission | Application** to display the **Find Application** browser.

Application icon

2. Enter the **Surname** or **Forename** for the applicant or select the **Application Status**, **Intake Group**, **Admission Group** or **Tier** from the drop-down lists. Alternatively, leave all the fields blank to search for all applicants.

3. Click the **Search** button to display the applicants who match the search criteria entered.

4. After identifying the correct application to delete, click the **Delete** button to display the following warning message.

   Deleting Applications will affect your annual statistics and is irreversible. Are you sure you wish to continue?

5. Click the **Yes** button to delete the application and display the following message.

   The application has successfully been deleted from the system.

6. Click the **OK** button to complete the process.

Running the Projected Pupil (or Student) Numbers Report

The consolidated Projected Pupil (or Student) Numbers report enables schools to plan more effectively for the forthcoming admission intakes. The number of projected pupil/students can be reported on by **Application Status** or **Application Status Category**, and can be filtered on **Gender**, **Boarder Status**, **House** and **Applicant Feeder**.

The selection of a **Comparison Date** and **Comparison Year** enables you to compare projected pupil/student numbers on two dates, to facilitate the tracking of target pupil/student figures.

> **IMPORTANT NOTES:** *You are strongly advised to run the School Promotion routine (via **Routines | School | Promotion**) before generating the Projected Pupil (or Student) Numbers report to ensure accurate results in the report output.*
>
> *You are also advised to ensure that any pupil/student leavers have been recorded.*

1. Select **Reports | Admissions | Projected Pupil** (or **Student**) **Numbers** to display the **Projected Pupil** (or **Student**) **Numbers** dialog.

2. Select the required **Admission Year** from the drop-down list. This relates to the year for which you want to run the report. Click the **Inactive Items** button to view any inactive admission years.

3. Select the appropriate **School Tier** from the drop-down list.

4. Highlight the **Year Group**(s) and **Admission Season**(s) you wish to include in the report.

5. The **Report By** panel enables you to select the method of reporting for the last two sections of the report. Select the **Application Status** or **Application Status Category** radio button then select the appropriate option from the respective drop-down list.

   - Select the **Application Status** radio button then select the appropriate status from the drop-down list if you want to report on all available application statuses or a single application status. This option is selected by default.

   - Select the **Application Status Category** radio button then select the appropriate category status from the drop-down list if you want to report on applications by category or a single category.

The items available in the drop-down lists are those that are marked as **Active** in in the **Application Status** lookup record (via **Tools | Lookups | Maintain**). For example, to report only on application records with a status of **Applied**, select the **Application Status** radio button then select **Applied** from the adjacent drop-down list. To report on all application records (i.e. all application records regardless of their status), select the **Application Status** radio button then select **<Any>** from the adjacent drop-down list. The same rules apply if you elect to report by **Application Status Category**.

When the report is generated, the titles of the third and fourth sections vary depending on the options selected.

6. Select the **Gender**, **Boarder Status** and **House** from the drop-down lists.

7. Select the required **Applicant Feeder** from the drop-down list. This enables you to filter the report by **Internal** applicants, **External** applicants or **<Any>**. An internal applicant is somebody who is already at your establishment and is applying to enter the next tier at the establishment. An external applicant is somebody who is applying to enter the next tier of their education from another establishment.

8. To enable the comparison of projected pupil/student numbers on two dates (i.e. a comparison between projected numbers on this date last year and today), as displayed in the **Comparative Analysis by Application Status on <date> for <year>** section of the report output:

   ▪ Enter a **Comparison Date** or select the date with which you wish to compare figures from the Calendar. The date defaults to exactly one year ago today but can be changed to <u>any</u> date in the past, up to and including yesterday's date.

   ▪ Select the **Comparison Year** from the drop-down list. This is either the current year (by default) or a future year. It is not possible to select a year earlier than that in which the **Comparison Date** lies.

   The number of applications made on the **Comparison Date** (in its corresponding academic year) is compared with the number of applications made so far in the selected **Comparison Year**.

   This functionality enables the tracking of progress towards target pupil numbers.

9. Click the **OK** button to display the **Run a Screen Based Report** dialog.
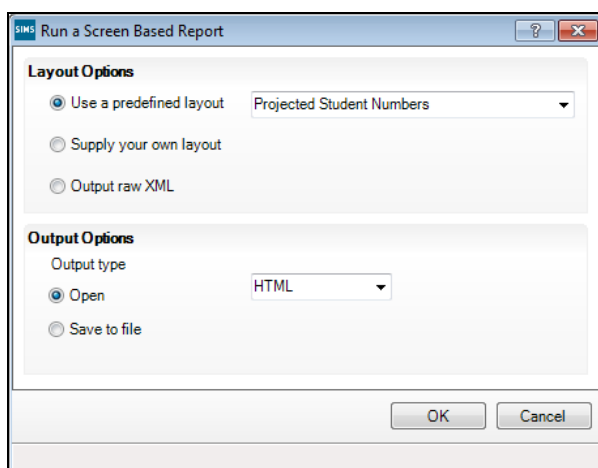
10. After specifying the **Layout Options** and **Output Options**, click the **OK** button to produce the Projected Pupil (or Student) Numbers report.

The report can be output to Excel, an HTML browser or as XML data.

Data filters:None

Student Numbers by Year Group (2012/2013)

	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
On roll at start of year	0	0	5	0	0	30	26	14	15	14	57	41	35	47	48	332
Joiners after start of year	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Leavers before end of year	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Leavers at end of year	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total moving to next year	0	0	5	0	0	30	26	14	15	14	57	41	35	47	48	332

Promoted Students for 2013/2014

	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
Planned Admission	0	0	0	0	0	0	0	60	1	10	80	0	0	14	0	165
Promoted Students	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted Applicants	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total (Promoted Students + Accepted Applicants)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Current Applicants by Application Status (2013/2014)

	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
Visit Arranged	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Visit Made	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Registration Form Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Registration Fee Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Entrance Exam Confirmed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reference Requested	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reference Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawn / No Longer Interest	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1
Applied	0	0	0	0	0	0	0	1	1	0	3	0	0	0	0	5
Offered	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

To assist with the identification of the report scope, if any of the following report filters have been applied, they are displayed as the report header:

- **School Tier**
- **Gender**
- **Boarder Status**
- **House**
- **Applicant Feeder**

If no report filters have been set (i.e. all filters have been left as the default **<Any>**), **Data filters: None** is displayed as the report header (as it is displayed in the previous graphic).

The report is split into four sections:

- Pupil (or Student) Numbers by Year Group (<Academic Year>) (please see *Pupil (or Student) Numbers by Year Group (<Academic Year>* on page *32*)
- Promoted Pupil (or Student)s for <Next Academic Year> (please see *Promoted Pupil (or Student)s for (<Next Academic Year>)* on page *33*)
- Current Applicants by Application Status (<Next Academic Year>) or the Current Applicants by Application Status Category (<Next Academic Year>), depending on the radio button selected in the **Report By** panel (please see *Current Applicants by Application Status/Application Status Category (<Admission Year + 1>)* on page *34*).

- Comparative Analysis by Application Status on <Comparison Date> for <Comparison Year> or the Comparative Analysis by Application Status Category on <Comparison Date> for <Comparison Year>, depending on the radio button selected in the **Report By** panel (please see *Comparative Analysis by Application Status/Application Status Category on <Comparison Date> for <Comparison Year>* on page *34*).

Each report row includes a **Total** column, enabling you to view whole school totals.

Additional Resources:

Importing and Maintaining Lookups in the *Customising SIMS* chapter of the *Setting Up and Administering SIMS* handbook

Pupil (or Student) Numbers by Year Group (<Academic Year>)

The **Pupil (or Student) Numbers by Year Group (<Academic Year>)** section of the report provides granular statistics on currently on-roll pupil/students.

Student Numbers by Year Group (2012/2013)	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
On roll at start of year	0	0	5	0	0	30	26	14	15	14	57	41	35	47	48	332
Joiners after start of year	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Leavers before end of year	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Leavers at end of year	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total moving to next year	0	0	5	0	0	30	26	14	15	14	57	41	35	47	48	332

The following rows are displayed in this section:

- **On roll at start of year**

  For each year group, the number of pupil/students on-roll at the start of the selected academic year group is displayed.

- **Joiners after start of year**

  For each year group, the number of pupil/students who came on-roll after the start of the selected academic year is displayed.

- **Leavers before end of year**

  For each year group, the number of pupil/students who left the school, or are due to leave the school, before the end of the selected academic year is displayed.

- **Leavers at end of year**

  For each year group, the number of pupil/students who are due to leave the school at the end of the selected academic year is displayed.

- **Total moving to next year**

  For each year group, this is calculated as follows: (**On roll at start of year** + **Joiners after start of year**) - (**Leavers before end of year** + **Leavers at end of year**). This also indicates the number of pupil/students who are scheduled to transfer into the next academic year.

IMPORTANT NOTE: If a pupil/student changes year group part way through the academic year, they will be included in the column associated with their <u>current</u> year group.

Promoted Pupil (or Student)s for (<Next Academic Year>)

The **Promoted Pupil** (or **Student**)**s for <Next Academic Year>** section of the report provides statistics regarding the number of pupil/students at your school who will be promoted next year and the number of applicants whose applications have been accepted.

Promoted Students for 2013/2014															
	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
Planned Admission	0	0	0	0	0	0	0	60	1	10	80	0	0	14	0	165
Promoted Students	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted Applicants	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total (Promoted Students + Accepted Applicants)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

The following rows are displayed in this section:

- **Planned Admission**

  This represents the maximum number of new pupil/students who can be admitted into an intake group (i.e. the Planned Admission Number, or PAN).

- **Promoted Pupil/Students**

  This represents the number of pupil/students entering each year group from another year group in your school.

- **Accepted Applicants**

  This represents the number of applicants whose applications have been accepted.

- **Total (Promoted Pupil/Students + Accepted Applicants)**

  The total number of people who currently plan to attend your school, by year, in the next academic year.

NOTE: If you have not yet run Academic Promotion for the year into which you are moving, the figures in this table will not be accurate.

Current Applicants by Application Status/Application Status Category (<Admission Year + 1>)

The **Current Applicants by Application Status <Admission Year + 1>** section of the report provides granular statistics on the status of all applications, by year group, and the number of enquiries that have been made (**Prospective Students**) for the selected year of the report.

> *NOTE: This section will be named **Current Applicants by Application Status Category (Admission Year +1)** if you selected this radio button in the **Report By** panel on the **Projected Student Numbers** dialog.*

Current Applicants by Application Status (2013/2014)	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
Visit Arranged	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Visit Made	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Registration Form Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Registration Fee Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Entrance Exam Confirmed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reference Requested	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reference Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawn / No Longer Interest	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1
Applied	0	0	0	0	0	0	0	1	1	0	3	0	0	0	0	5
Offered	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawn1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Prospective Pupils	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1

The number of rows displayed in this section of the report depends on the number of **Active** lookup values defined for the **Application Status** lookup table (via **Tools | Lookups | Maintain**). Additionally, the **Prospective Pupils** row will not be displayed if a report filter has been set in the **Report By** panel of the **Projected Student Numbers** dialog (please see *Running the Projected Pupil (or Student) Numbers Report* on page *28*).

For an enquiry to be included in the **Prospective Pupils** (or **Students**) row of the report, all of the following rules must be met:

- The enquiry must not have a corresponding, current application.
- The proposed year of entry in the enquiry must match the Admission Year specified for the report.
- They proposed year group for the enquiry must be specified.
- The enquiry must be active.
- The prospective pupil must <u>not</u> be withdrawn.

Comparative Analysis by Application Status/Application Status Category on <Comparison Date> for <Comparison Year>

The **Comparative Analysis by Application Status on <Comparison Date> for <Comparison Year>** section of the report enables you to compare projected pupil/student numbers on two dates, to facilitate the tracking of target pupil/student figures, based on the options selected from the **Comparison Date** and **Comparison Year** drop-down lists on the **Projected Student Numbers** dialog (please see *Running the Projected Pupil (or Student) Numbers Report* on page *28*).

> NOTE: This section will be named **Comparative Analysis by Application Status Category on <Comparison Date> for <Comparison Year>** if you selected this radio button in the **Report By** panel on the **Projected Student Numbers** dialog.

Comparative Analysis by Application Status on 28/09/2011 for 2012/2013	P1	P3	P2	P4	P5	Form 1	L2	U2	L3	U3	Form 4	L5	U5	L6	U6	Total
Visit Arranged	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Visit Made	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Registration Form Received	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1
Registration Fee Received	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	2
Entrance Exam Confirmed	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reference Requested	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reference Received	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawn / No Longer Interest	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Applied	0	0	1	0	1	0	0	0	0	3	9	0	0	0	0	14
Offered	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawal	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Admitted2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rejected2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Offered2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Accepted2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Withdrawn1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Reserved2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Prospective Pupils	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1

The number of rows displayed in this section of the report depends on the number of **Active** lookup values defined for the **Application Status** lookup table (via **Tools | Lookups | Maintain**). Additionally, the **Prospective Pupils** row will not be displayed if a report filter has been set in the **Report By** panel of the **Projected Student Numbers** dialog (please see *Running the Projected Pupil (or Student) Numbers Report* on page *28*).

For an enquiry to be included in the Prospective Students row of the report, all of the following rules must be met:

- The enquiry must not have a corresponding, current application.
- The proposed year of entry in the enquiry must match the **Comparison Year** specified for the report.
- They proposed year group for the enquiry must be specified.
- The enquiry must be active.
- The prospective pupil must <u>not</u> be withdrawn.

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