



SIMS

Approved
Support
Unit

End of Academic Year Using SIMS

coventry.gov.uk

Data Protection Disclaimer

Screenshots used in this presentation and access to the management information system has been performed using a test system.

People depicted do not exist.

Screen shots are used for illustration purposes only.

A decorative graphic consisting of several overlapping, wavy blue lines that flow from the bottom right towards the center of the slide.

Objectives

- This session will cover the process that should be followed to enable a successful transition from one academic year to another. We will cover:
 - Creating a new academic year
 - Setting up next year's registration groups and year groups
 - Promotion of pupils from one year into the next
 - Admitting new pupils
 - Processing leavers
 - Housekeeping
 - Help and support



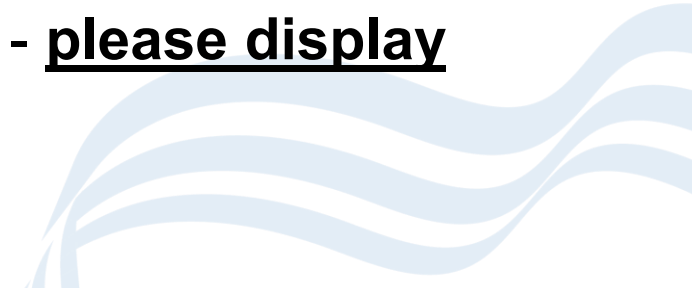
Getting Help

- These slides and the video will be posted to our Video Library – <https://www.schoolsict.digital/sims>
- SIMS handbook available on our website under End of Academic Year [MIS management software](#)
- End of Year Checklist
- If you get stuck, have any questions or concerns, please log a ticket with us, call 024 7678 6620 or email schoolsict@coventry.gov.uk

Drop-in Sessions

- **Tuesday 23 June 2026** - Academic Year End workshop (in-person - **One Friargate**) 10-12 and 1-3
 - **Monday 29 June 2026** - Academic Year End workshop (in-person – **Cannon Park Primary School**) 10-12 and 1-3
 - Training laptops available
 - Please use this form to indicate if you will be attending a session: <https://forms.office.com/e/ktT5hSLtwX>
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Drop-in Session – Location Info

- 23 June – One Friargate
 - One Friargate, Station Square, Coventry CV1 2FL
 - Meeting room 7.1
 - The nearest council car park is [Coventry Railway Station](#) (access from Eaton Road)
 - 1 minute from train station
 - 29 June – Cannon Park Primary School
 - Bransford Avenue, Coventry CV4 7PS
 - Parking is limited, you will need to park on the street.
 - Parking is restricted due to proximity to Warwick University - **please display the parking waiver code in your windscreen**
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End Of Year

Do these processes before you finish for the summer



Preparing for academic year end

- Before you start:
 - Gather a finalised list of your new tutor groups for next year – ask SLT to provide them in alphabetical order
 - Confirm the term dates and inset days for your school
 - Decide to import ATFs or not
 - You can run these processes at any time, BUT it's a good idea to ensure your information is no longer subject to change before you start



Processes to complete

- Changes to teaching and support staff
 - Current Pastoral structure
 - Create new academic year
 - Adjust the new academic year structure
 - Promotion Mapping
 - Create pre-admission groups
 - Import ATFs and/or CTFs for new pupils **or**
 - Enter pupils manually
- 

Processes to complete (2)

- Update application status for pre-admission pupils
 - Allocate pre-admission pupils to class groups
 - Print Registration Group Lists
 - Deal with leavers
 - Generate CTFs for Leavers
 - Enter Part-time details for pupils as necessary
 - Print pupil and staff dinner money balances
- 

Creating the new Academic Year



Check the current pastoral structure

- This process is required to tidy the current structure. The structure defines your registration groups and year groups.
 - **Focus | School | Pastoral Structure | Current Structure**
 - Click **Go**
 - Expand the options **Pastoral Structure, National Curriculum Year Taught** in etc. and review
 - Review and check what might need to change for next year.
 - Do not add items for next year here.
- 

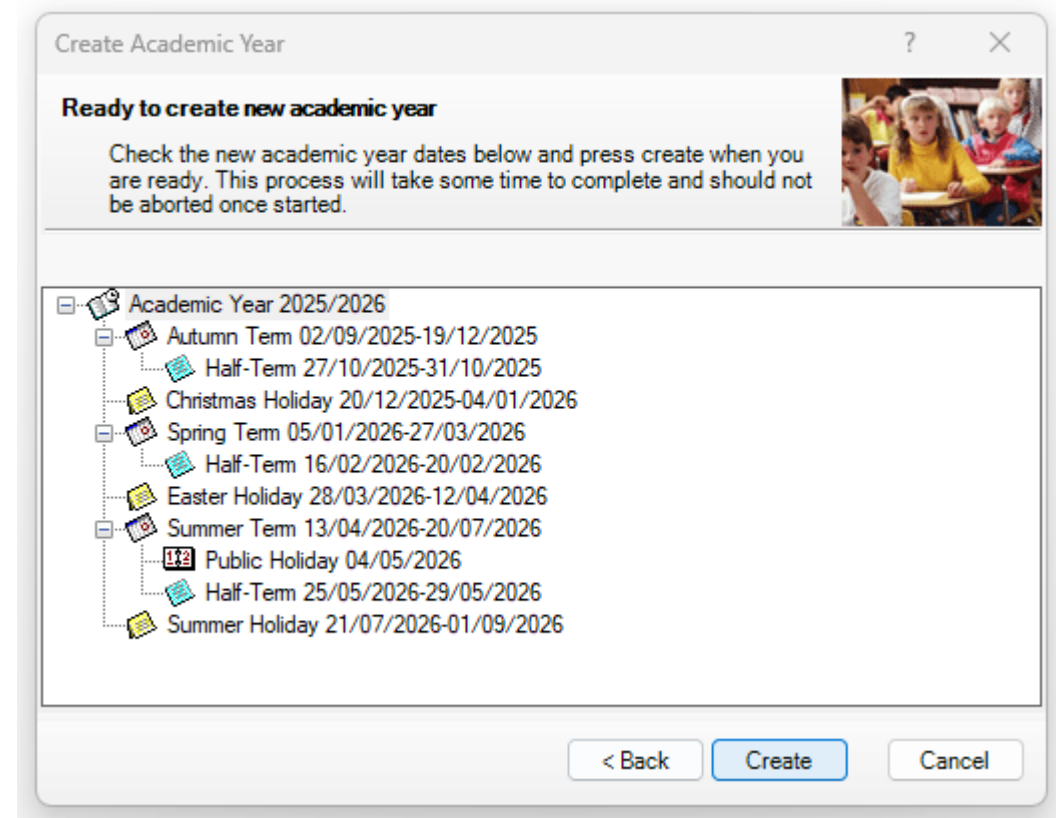
Create your academic year

This process setups the new academic year for your school.

- **Routines | School | Academic Year**
 - It is a wizard, and you should follow it through to the end.
 - Some items cannot be changed once the structure is setup, so please pay careful attention to the screens.
 - Term start dates should be set as per your school's term dates (Coventry's dates are shown on the next slide).
 - Inset days if not known can be added at a later date.
 - Once you have entered the data into the wizard save it. This may take a while to generate the academic year.
- 

Create your academic year (2)

- Once you have completed the wizard click Create to create the academic year.
- This process may take a while.



Coventry Term Dates

Autumn term

- Starts: Tuesday, 1 September 2026
- Ends: Friday, 18 December 2026

October Half Term Holiday

Monday 26 October 2026 to Friday 30 October 2026

Spring term

- Starts: Monday, 4 January 2027
- Ends: Thursday, 25 March 2027

February Half Term Holiday

Monday 15 February 2027 to Friday 19 February 2027

Easter Holiday

Monday 30 March 2026 to Friday 10 April 2026

Summer term

- Starts: Monday, 12 April 2027
- Ends: Wednesday, 21 July 2027

May Day Bank Holiday Monday 3 May 2027

Half Term Holiday

Monday 31 May 2027 to Friday 4 June 2027

Summer Holidays begin

- Starts: Thursday, 22 July 2027
- Ends: Tuesday, 31 August 2027

2027/28 Academic Year

Starts Wednesday 1 September 2027



Update Next Year Pastoral Structure

- **Focus | School | Pastoral Structure | Next Academic Year Structure**
 - Enter a date in the new year e.g. **01/09/2026** and click **Go**
 - Add any new registration groups and remove any which are not being used, next year.
 - Do NOT rename existing groups as this will affect the history.
 - Save any changes you have made
- 

Promotion Mapping

- This process defines which year and registration groups your pupils will move into next year. Do not start this process if you have not yet setup your registration groups for next year.
- **Routines | School | Promotion**
- Data is loaded – this may take some time
- **Setup Promotion Mapping** box displays.
- Select which year to **Promote From** and select **Load**.
- Make changes to the **Promotion Path** as required.
- Select the **Override Membership** check box in both the **Year Group** and **Class** panels the **first** time you carry out the promotion mapping process.
- Click **Finish** button and then **Save** the settings

IMPORTANT NOTE: If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the **Override membership** check box is not selected if you wish to retain your previous settings.

Setup Promotion Mapping from Academic Year 2025/2026

Academic Year:
Promote from: Academic Year 2025/2026 [Load]

Year Group

Year Group	Promotion Path
R	1
1	2
N2	R
2	3
3	4

Override membership ☐ [Set Default]

Class

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year R/Yea...	ELM	2JB	Mr Richard Perrin	☐	☐
Year R/Yea...	PINE	2GH	Mr Oliver Joyner	☐	☐
Year R/Yea...	ASH	2JB	Miss Amelia Kent	☐	☐
Year R/Yea...	OAK	2GH	Miss Shirley Fortune	☐	☐
Year N2	PM		Ms Lisa Lawson	☐	☐
Year N2	AM		Mrs Rebecca Lorrin	☐	☐

Override membership ☐ [Finish]

Make manual adjustments

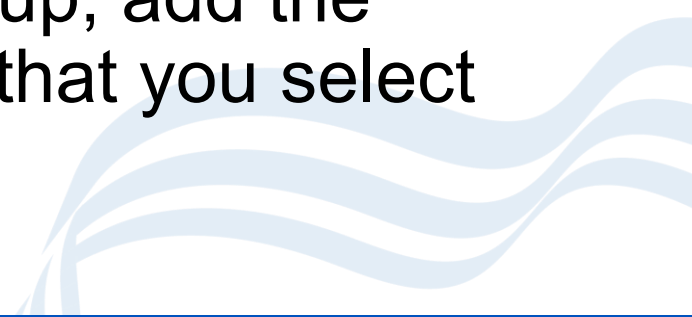
- Once loaded, you can make manual adjustments to the promotion paths for individual students.
- Expand the year groups as required and make changes in the “Next” columns.
- Save when you are happy.
- You can repeat the process a number of times until you are happy that all pupils have been mapped to the appropriate classes.

Promote pastoral groups

Save Map Filter Customize

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: N2					
+ Current Year Group: R					
+ Current Year Group: 1					
+ Current Year Group: 2					
+ Current Year Group: 3					
Abbas, Latif	☐	3	4	3TO	4ES
Ackton, Simon	☐	3	4	3CB	4SL
Andrews, Meili	☐	3	4	3CB	4SL
Andrews, Melissa	☐	3	4	3CB	4SL
Bhandari, Firoz	☐	3	4	3CB	4SL

Check Registration Tutors

- Once the promotion mapping process is complete, you are advised to check the registration group assignments in the pastoral structure via **Focus | School | Pastoral Structure | Next Academic Year Structure**.
 - Expand the structure and check each registration group by **right-clicking** and selecting **Properties**.
 - If necessary, **add/amend** the registration tutor.
 - If you have two registration tutors sharing the group, add the other registration tutor as a Supervisor, ensuring that you select the Role of Joint Main Supervisor.
- 

Admissions



Adding New Pupils

There are four ways:

1. Manually adding a Student via **Focus | Pupils | Pupil Details | New**
 2. Manually adding a Pre-admission student via **Focus | Admission | Application | New**
 3. **Via Common Transfer File (CTF)** - if arriving from another school in England
 4. **Via Admissions Transfer File (ATF)** – if new intake
- 

Set up Admission Group

- **Routines | Admission | Admission Groups | Setup**
- Click New
- Complete the information – you will need to setup different admission groups for each year group e.g. Reception and Nursery.

The screenshot displays the 'Find Intake Group' application window. At the top, there is a toolbar with icons for New, Search, Open, Delete, Print, Browse, Next, and Previous. Below the toolbar, the title bar reads 'Intake Group Details: New'. Underneath, there are buttons for Save, Undo, and Print, followed by a status bar indicating '1 Intake Group' and '2 Admission Group'.

The main content area is divided into two sections:

- 1 Intake Group**: This section contains four rows of input fields:
 - Admission Year: A dropdown menu with '2025/2026' selected.
 - Admission Season: A dropdown menu with 'Autumn' selected.
 - Year Group: A dropdown menu with 'Year R' selected.
 - Planned Admission: A text input field containing '60'.
- 2 Admission Group**: This section contains two rows of input fields:
 - Name: A text input field containing '2025/2026 - Autumn Year R'.
 - Active: A checkbox that is checked.

ATFs (Admissions and Transfer File)

Provided via the LA Early Years portal and can be used to populate your system with your new intake.

1. Download the ATF from the LA portal
 2. Create a Pre-Admission Group (previous slide)
 3. Import the ATF via **Routines | Admission | Import ATF File**
 4. Choose the required options
 5. Select the pre-admission group to place the students into.
 4. Turn off the options that you don't require.
 5. Complete the Import
- 

Notes About ATFs

- Can be useful for populating your system with the new students.
 - ATF will contain all applications that have been awarded a place. You will need to delete those that don't take up their place.
 - ATFs will contain the information used by the parent when applying for a school place. This can create some duplicate contact details.
 - Use with Caution.
- 

Finalise Admissions

- **Routines | Admissions | Finalise Offers**
 - Offers must be finalised before they can be admitted.
- **Routines | Admissions | Accept Applications**
 - Applications must be accepted before they can be admitted.



Allocate Admissions to Registration Groups

- **Focus | Admission | Application** – Registration panel to do manually
- Or you can complete through the new Pastoral Year Structure
Focus | School | Pastoral Structure | Next Academic Year



CTFs

- CTFs can be imported via **Routines | Data In | CTF Import**
- CTFs can be exported via **Routines | Data Out | CTF Export**
- When sending CTFs for leavers these can be done at anytime – including before the child has left your school. You can also do CTFs multiple times.



Leavers

- To process leavers, to go **Routines | Pupil | Leavers**
 - Select the students that you want to make leave. Filter the list as necessary. Click Select and All or Selected depending on your needs.
 - Review the list of leavers and remove any that shouldn't be made leaver.
 - Enter a leaving date, reason and any further information.
 - You can set different information for different pupils in one go by selecting the specific children and then using **Assign to All** or **Assign to Selected**
- 

Create CTFs for new schools

- Once you have added children as leavers its time to create CTFs for them.
- CTFs are created in the usual way – **Routines | Data Out | Export CTF**
- You can export multiple CTFs for each child if necessary – e.g. if the secondary school requests more than one.



Dinner Money

Dealing with Dinner Money for leavers



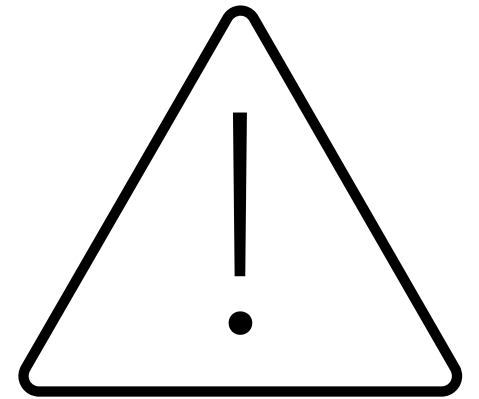
What are your options?

- For money owed to parents:
 - Refund to a payment card
 - Make a BACS or Cheque Payment to the Parent
 - Refund from Petty Cash (if you use Petty Cash in your school)
 - Transfer the balance to a sibling
 - Transfer the money into school funds (where the parent does not wish the money to be refunded to them).
 - For students in debt
 - Write off
 - Add payments
- 

Before you start

Before carrying out any of these processes, it is vitally important that your current Dinner Money balances are up to date.

You should also ensure that all meals taken have been entered.



Other considerations

- Before writing off any amount of dinner debt, you should consult with and obtain permission from your Headteacher and School Finance Officer
- Before transferring outstanding funds to siblings, school fund or other debt you should consult with the payer directly.
- Refunds to credit/debit card will incur the transaction charge on the refund also. This means refunds may cost you money.



Report to Help

- The Pupil or Staff Balances report will help you.
- **Reports | Dinner Money | Finance | Pupil (or Staff) Balances**
- **Focus | Dinner Money | Pupil Payments**
 - Browse current
 - Browse leavers
 - Sort balance column to see debtors



Finance Processes

For LA Maintained Schools



Month End Checks

- AP Invoices paid that need to be
 - AR Invoices created and sent
 - Bank Reconciliation
 - Journals created where necessary
 - Salary Download completed
 - VAT Returns completed
- 

Housekeeping

Keeping your data tidy. These processes are mostly recommended by not mandatory



Review your users

- It's a good idea at this time of the year to ensure that you have tidied up your users of the system. Remove or end date their access to user accounts for any staff that are leaving.
 - **Focus | System Manager | Manage Users**
 - To remove a user's permissions to login, untick the button "Active" button
 - Check the users **Groups** and remove any which are no longer necessary or end date them.
 - Make sure to save the changes when you are finished.
- 

Check Integrations

- This is a reminder to disable user accounts for any third-party services that you are ceasing to use from the end of this year.
 - You can locate the third-party accounts being used from **Focus | System Manager | Manage Users**
 - Disable those accounts as necessary.
- 

Name Formats

- This process allows you to change to UPPERCASE or Title Case names in your system.
- Click **Tools | Housekeeping | General**
- Choose the type of record you want the format to apply to and make your selection for UPPERCASE or Title Case.
- Click **Apply** to save your changes.

1 Name Format

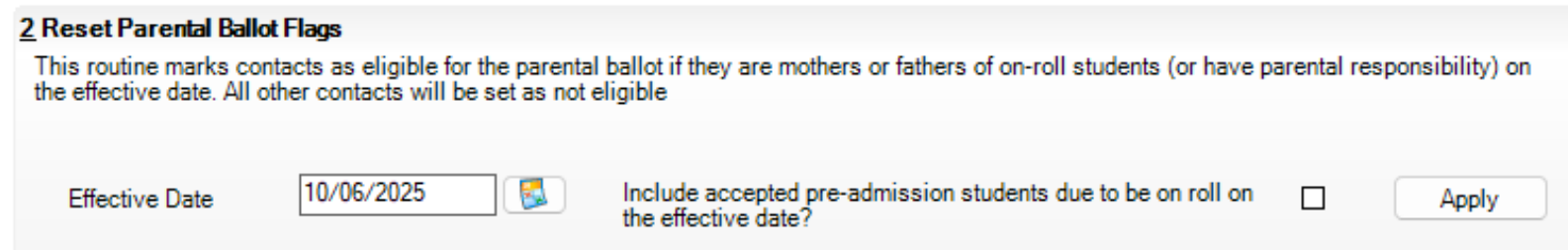
Apply To		UPPERCASE	Title Case
Students / Applicants	☐	☐	☒
Staff	☐	☐	☒
Contacts	☐	☐	☒
Agents	☐	☐	☒

Example: Peter John O'Malley-Smith

Apply

Refresh Parental Ballots

- This process marks contacts as eligible for the parental ballot if they have parental responsibility on the effective date.
- Click **Tools | Housekeeping | General | Panel 2**
- Enter an Effective Date and select the box for all accepted pre-admission students.
- Click **Apply**



2 **Reset Parental Ballot Flags**

This routine marks contacts as eligible for the parental ballot if they are mothers or fathers of on-roll students (or have parental responsibility) on the effective date. All other contacts will be set as not eligible

Effective Date 

Include accepted pre-admission students due to be on roll on the effective date? ☐

Apply

Update Mailing Points

- This routine identifies one pupil at each address as the mailing point. Other children at the same address will be marked as NOT the mailing point.
 - Click **Tools | Housekeeping | General | Panel 3**
 - Enter an Effective Date and select if you want the Youngest or Oldest Child at an address to be the mailing point.
 - Click **Apply** to save the changes
- 

Update Salutations & Addressee

- This process updates the student's parental salutation and addressee fields.
 - Click **Routines | Pupil | Salutation/Addressee | Parental (or Contact)**
 - Search for all pupils, click **Select > All**
 - Click the **Update Parental Salutation** and **Update Parental Address boxes** and click **Overwrite**.
 - Click **Generate**
 - Review the list and then if you are happy click **Save**
- 

Delete Unlinked Persons

- This process tidies the data in your system keeping you GDPR compliant. People become unlinked as the original person they were linked to has been deleted. This is often the case when pupils have been deleted.
- **Tools | Housekeeping | Delete Unlinked Persons**
- A list of unlinked people is shown. Select the ones you want to delete and click **Delete**



Delete Unlinked Contacts

- This process tidies the data in your system keeping you GDPR compliant. Contacts become unlinked as the original person they were linked to has been deleted. This is often the case when pupils have been deleted.
 - **Tools | Housekeeping | Delete Unlinked Contacts**
 - Click Search and a list of contacts who are not linked to a pupil are shown.
 - Click **Select > All** or make an individual selection if you don't want to delete everyone.
 - Then click **Delete**
- 

Start of Year

These processes must be completed
once the new year has started



Processes to complete

- Admit new pupils
 - Enter part-time details for pupils (via pupil record)
 - Apply part-time attendance not required codes
 - Print manual registers for first week of term (if required)
 - Enter outstanding reason for absences for previous summer term.
 - Print official register for July (Optional)
 - Bulk update case changes for pupil names, reset parental ballot flags, update mailing points
 - Update parental salutation and addressee information
 - Bulk update pre-admission pupil data
 - Set academic year (curriculum users only)
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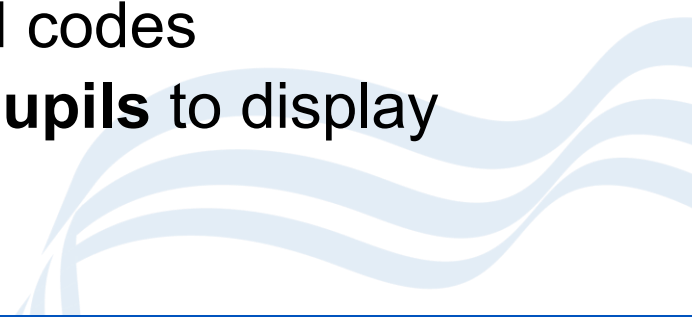
Other things you may need to do

- Adding in additional INSET days if these have now been set.
 - Chasing CTFs from sending schools.
 - Creating CTFs for receiving schools.
 - Dealing with left over dinner money debt or credit balances
 - Deleting pupils who never arrived at school.
 - Processing any additional leavers
 - Creating new users for new staff members
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Admitting New Students

- **Routines | Admission | Admit Applications**
 - Open the **Intake Group**
 - Admit relevant pupils
 - You can also bulk assign UPN numbers for your new admissions to if necessary.
- 

Part-time details

- To ensure pupils who are no longer part-time show correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day.
 - This is mostly relevant to Nursery schools (or schools with nursery age children).
 - Check details via **Focus | Pupil | Pupil Details**, select the **Registration panel** then check or amend the **End Date** in the **Part Time Details** section.
 - Once you have identified which pupils are part time for the new academic year you need to define the part-time sessions and dates for the coming year.
 - Run the part-time attendance routine to add Not Required codes
 - Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.
- 



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Thank you for your time