

Adding Intake/Admission Groups

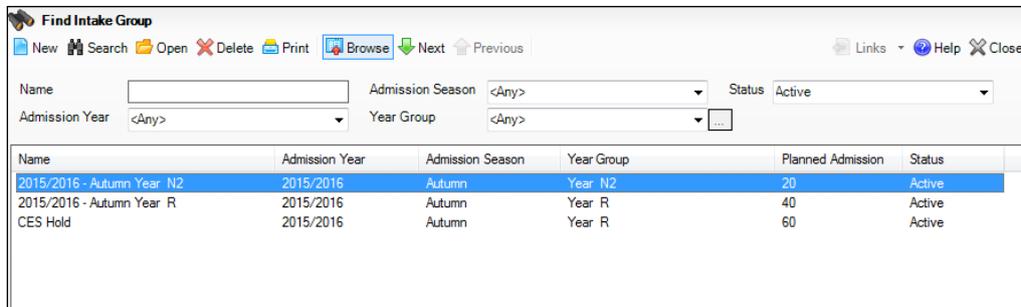
Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, if you have a staggered intake.

IMPORTANT NOTE: Please ensure that the **Date of Admission** lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to use if you are unsure.

If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.

If you need to add a new year group (e.g. N2) please speak to your SIMS Support Team. This is also a good time to delete or make inactive any unwanted admission groups.

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



Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2015/2016 - Autumn Year N2	2015/2016	Autumn	Year N2	20	Active
2015/2016 - Autumn Year R	2015/2016	Autumn	Year R	40	Active
CES Hold	2015/2016	Autumn	Year R	60	Active

Carry out a search to ensure that the intake group does not already exist.

2. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added.

In addition, Own Admission Authority schools who have applied a Basic or Full Admissions Licence will see two additional fields (**Admission Policy** and **Numbers to Rank**).

3. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2016/2017) from the drop-down list (this defaults to the current academic year).
4. Select the required **Admission Season (Autumn, Spring or Summer)** or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

5. Select the required **Year Group** from the drop-down list.
6. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
7. Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the **Admission Policy** drop-down list. Select a policy, if required.
8. Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can enter the number of applications that should be ranked in the Numbers to Rank field. By default, all applications an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter the agreed number in this field.
9. If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year, Admission Season** and **Year Group**, e.g. **2016/2017 – Autumn Year N2**. The default name can be amended, if required.

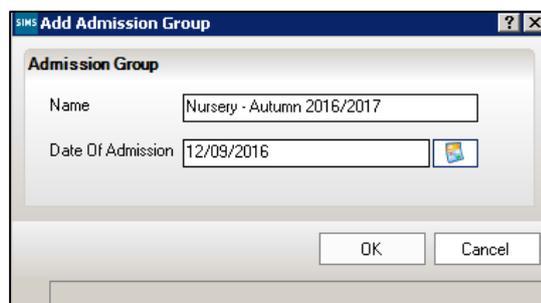
10. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. If the second panel is labelled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labelled **Admission Group**, SIMS is not set up to allow multiple admission groups.

If SIMS is not set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)*.

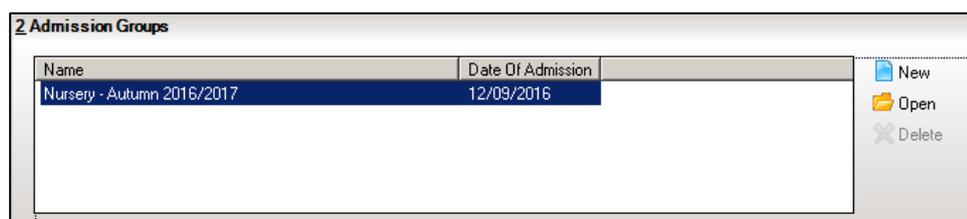
1. From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.



2. Enter a **Name** for the admission group together with the **Date Of Admission**. Alternatively, click the **Calendar** button and select the required date.

IMPORTANT NOTE: Please ensure that the **Date Of Admission** falls within the applicable academic year. We recommend that the date of admission is the day that the children will actually arrive in school, i.e. not a teacher training day. However, if you are unsure please check with your Local Authority for advice on the correct date to use.

3. Click the **OK** button to add the admission group and return to the **Intake Group Details** page.
4. If any further admission groups are required, click the **New** button in the **Admission Groups** panel and repeat steps 2 and 3.



5. Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

Adding an Admission Group (Multiple Groups Not Enabled)

1. Clicking in the **Name** field provides a default name for the group, which can be overtyped as required.

2 Admission Group	
Name	<input type="text" value="2015/2016 - Autumn Year N2 (A)"/>
Date Of Admission	<input type="text" value="04/09/2015"/> 

2. Enter the **Date Of Admission** for the group.
3. Click the **Save** button to create the intake and admission group.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

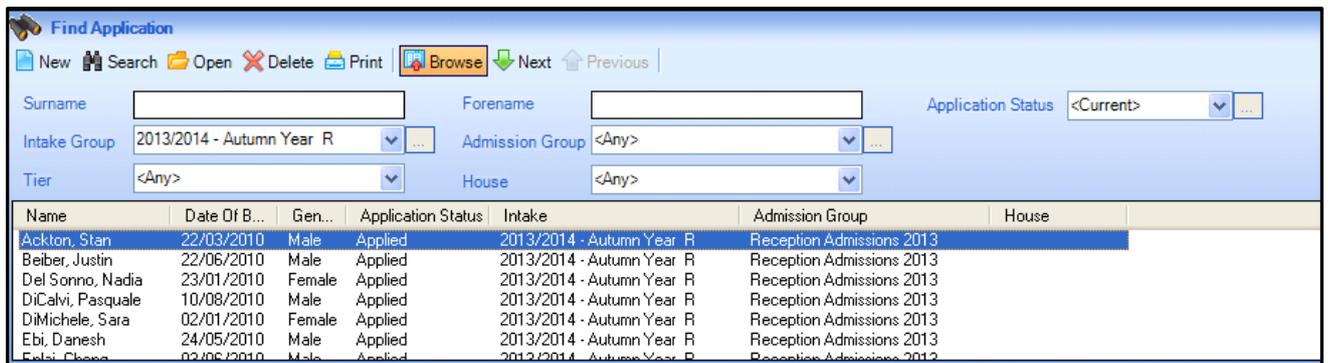
Recording a New Applicant

There are several ways in which an applicant can be added to SIMS:

- Manual entry via the keyboard
- Importing via CTF (although some details may have already been entered into SIMS before the CTF is imported)
- Importing via ATF

This section describes how to manually enter an applicant into SIMS together with the completion of their mandatory information.

1. Select **Focus | Admission | Application** to display the Find Application browser. Add the name of the Intake Group that you are going to add Applicants to and then click on Search to display the list of pupils already added to the Group



The screenshot shows the 'Find Application' window with search filters and a table of results. The filters are: Surname, Forename, Application Status (set to '<Current>'), Intake Group (set to '2013/2014 - Autumn Year R'), Admission Group (set to '<Any>'), Tier (set to '<Any>'), and House (set to '<Any>'). The table below shows the results:

Name	Date Of B...	Gen...	Application Status	Intake	Admission Group	House
Ackton, Stan	22/03/2010	Male	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	
Beiber, Justin	22/06/2010	Male	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	
Del Sonno, Nadia	23/01/2010	Female	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	
DiCalvi, Pasquale	10/08/2010	Male	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	
DiMichele, Sara	02/01/2010	Female	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	
Ebi, Danesh	24/05/2010	Male	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	
Falst, Chessa	02/06/2010	Male	Applied	2013/2014 - Autumn Year R	Reception Admissions 2013	

2. Click the **New** button to display the Add Applicant page with the Basic Details panel displayed. This panel is used to enter basic information to check that the applicant does not already exist in SIMS.



The screenshot shows the 'Add Applicant' page with the 'Basic Details' panel. The fields are: Surname (Smith), Forename (John), Gender (Male), and Date of Birth (empty). A 'Continue' button is visible at the bottom right.

3. Enter any combination of the Surname (mandatory), Forename and Date of Birth and/or select the Gender from the drop-down list and then click the Continue button.

NOTE: It is important to ensure that Surnames and Forenames are spelt correctly at this point to ensure that any matching existing records are identified thus avoiding duplicates being created. If you are unsure, enter partial Surnames/Forenames as required.

- If no existing applicants are found, the remainder of the Application page is populated with the details just entered. Mandatory fields are highlighted in red.
- If the applicant details are similar to an existing person in SIMS, a Matched People panel is displayed showing the possible matches. In this example (different details to the example above) a number of matches have been found for J Smith.

Matched People
The following people known to the SIMS database have similar details.
To add a new Student with the details entered above, select New.
To add an existing person or edit a known Student, select Open.

Full name	Gender	Roles	Address
Smith, Jade	Female	Student, Applicant	1 Church Corner Upton Did...
Smith, Mr James	Male	Contact	86 Chapel Street Luton LU...
Smith, Mrs Jane	Female	Contact	1 Christys Yard Hinworth ...
Smith, Mrs Jessica	Female	Contact, Parent	
Smith, Mrs Jessica	Female	Contact	3 Kaplan Close Shenley Lo...
SMITH, Mrs JUDITH	Female	Contact, Parent	

New
Open

NOTE: The Matched People panel displays a list of all people in the system which includes staff, contacts, agents, etc. If you think the applicant already exists, check that the Role is Student, Applicant. The sort order of the display can be changed by clicking the required column heading.

- If the applicant does not appear in the list, click the **New** button to create a new record populated with the search information previously entered.
- If the required applicant appears in the list, highlight their name and click the **Open** button to edit their details.

Completing Basic Details

Once a new record has been created, the Basic Details panel is populated with the search information entered in the previous step. Any incomplete mandatory fields are displayed in red.

1 Basic Details

Legal Forename	<input type="text" value="John"/>	Photograph	
Middle Name(s)	<input type="text"/>		
Legal Surname	<input type="text" value="Smith"/>		
Preferred Surname	<input type="text" value="Smith"/>		
Preferred Forename	<input type="text" value="Johhn"/>		
Date of Birth	<input style="background-color: red; color: red;" type="text"/>		
Current Age	<input type="text"/>		
Gender	<input style="background-color: red; color: red;" type="text"/>		
Birth Certificate Seen	<input type="checkbox"/>		
Former UPN	<input type="text"/>		
UPN	<input type="text"/>		
Quick Note	<input type="text"/>		

1. Complete any remaining name fields such as Middle Name(s).
2. Enter the Date of Birth (mandatory) if not already completed or click the Calendar button and select the required date. The Current Age is calculated automatically as the date of birth is entered.
3. Select the Gender from the drop-down list if not already completed.
4. Select the Birth Certificate Seen check box if applicable.
5. Enter the UPN in the UPN field if known.

NOTE: If the pupil does not have a UPN this can be issued when you admit the applicant.

Completing Registration Information

1. Click the **Registration** hyperlink to display the **Registration** panel. Red fields indicate mandatory information.

2 Registration Details

Application Status	Applied	Application Reference Number	
Intake Group		Admission Group	
Year Group		Year Taught In	
Class		House	
Date Of Admission		Age On Entry	
Admission Number		Enrolment Status	Single Registration
Boarder Status		Late Application	<input type="checkbox"/>

Part-Time

Start Date	
End Date	

Early Years Attendance Patterns

Monday Provision Type	
Tuesday Provision Type	
Wednesday Provision Type	
Thursday Provision Type	
Friday Provision Type	

2. The **Application Status** defaults to **Applied**. Amend the status if required, e.g. to **Accepted**.
3. Select the **Intake Group** (mandatory) and the **Admission Group** into which the applicant will be placed, from the appropriate drop-down lists. The **Year Group**, **Date of Admission** and **Age On Entry** are automatically populated based on the information recorded for the selected intake/admission group.
4. Select the **Year Taught In** from the drop-down list.
5. If known at this stage, select the **Class** into which the applicant will be admitted.
6. The **Enrolment Status** defaults to **Single Registration**.
8. If the applicant will be attending school on a part time basis, select the Part-Time check box.

<input checked="" type="checkbox"/> Part-Time	
Start Date	04/09/2013
End Date	31/08/2014

9. The **Start Date** must be entered and **End Date** can be completed if known.

NOTE: Part-time attendance is usually only applicable to nursery school children, but is permitted for all ages and is considered to be anything less than 10 sessions per week. It refers to part-time in education NOT part-time in one or more establishments.

2 Registration Details			
Application Status	Accepted	Application Reference Number	
Intake Group	2013/2014 - Autumn Year N2	Admission Group	Nursery Admissions 2013_1
Year Group	Year N2	Year Taught In	Curriculum Year N2
Class		House	
Date Of Admission	04/09/2013	Age On Entry	
Admission Number		Enrolment Status	Single Registration
Boarder Status		Late Application	<input type="checkbox"/>
<input checked="" type="checkbox"/> Part-Time			
Start Date	04/09/2013		
End Date	31/08/2014		

Once all the required basic and registration information has been entered, the record can be saved at any point. Click the **Save** button on the toolbar to save your progress. Any missing mandatory information is highlighted in red together with a warning message which is displayed on the Status Bar. This information must be completed before the record can be saved. You can now complete any of the other panels in the **Application** page and save at any subsequent point. The remaining panels of information are the same panels used to record information on existing pupils within your school.