

# Adding a New Pupil/Student to SIMS .net

This routine is usually only required when a child joins the school mid-term. At other times, the Admissions process should be used to add children. For details, please refer to the appropriate Admissions Code of Practice handbook. For more detailed instructions on any of the following processes, please refer to the *Managing Pupil/Students in SIMS .net handbook*. These handbooks can be accessed from the **Documentation** Shortcut panel.

## Adding Basic Details

1. Select **Focus | Pupil/Student | Pupil/Student Details** to open the **Find Pupil/Student** browser and click the **New** button to display the **Add Pupil/Student** page. Alternatively, click on the **Student Details** icon.



Student Details Icon

2. Enter the child's **Surname** and **Forename** and select their **Gender** from the drop-down list.

3. Enter their **Date of Birth** or click the **Calendar** button and select the required date.
4. Click the **Continue** button to display the **Pupil/Student Details** page. The **Basic Details** panel will be populated with the information that you have just entered. Complete the remaining details as required.
5. A photograph of the child can be added by clicking the **File Browser** button, selecting the required photograph and clicking the **Open** button.

## Adding Registration Information

1. In the **Registration** panel, select the child's **Registration Group/Class, Year Group and House**.

2. Select their **Enrolment Status, Year Taught In** and if applicable, **Boarder Status** from the respective drop-down list.

3. Enter the **Admission Date** (mandatory).

4. Select the **Attendance Mode**.

*NOTE: If the child is part-time, specify the period(s) during which this arrangement applies by clicking the **New** button in the **Part Time Details** panel.*

5. Enter the **Former UPN, UPN, Admission Number** and **Local UPN**, where applicable.

For children who do not have a UPN, one can be issued by clicking the **Generate UPN** button adjacent to the UPN field to open the **Issue UPN** dialog. Select either the **Issue Permanent UPN** or **Issue Temporary UPN** radio button then click **OK** to return to the **Pupil/Student Details** page. The UPN will be generated when you click the **Save** button.

## Adding a Home Address

1. In the **Addresses** panel, enter the new child's Post Code and then select the **Country** from the drop-down list if necessary.

*NOTE: The **Country** field is mandatory.*

2. Click the **Continue** button to display the **New Home Address Details (Not validated)** panel.
3. Complete the remaining address fields as required and click the **Save** button.

4. Enter **Additional Address** details, if applicable.

## Adding Telephone and Email Addresses

1. In the **Telephones and Email Addresses** panel, add a telephone number by clicking on the **New** button adjacent to the **Telephone/Fax Numbers** field.
2. Enter the telephone details in the relevant fields and then click the **OK** button.
3. Add an email address by clicking the **New** button adjacent to the **Email Addresses** field.
4. Enter the email address details and click the **OK** button.

## Adding Family and Home Information

1. In the **Family/Home** panel, add a contact by clicking the **New** button adjacent to the **Contacts** field to open the **Contact Details** dialog.
2. Enter the contact's **Surname** and **Forename**, select their **Gender**, then click the **Continue** button. The first contact is automatically given the same address as the child but can be modified later if required. Click the **OK** button to display the full **Contact Details** dialog.
3. Select the contact's **Title** from the drop-down list.
4. Enter a **Parental Salutation**, e.g. Mr Acton, **Honours**, if applicable, and **Parental Addressee**, e.g. Mr J Acton. Alternatively, these fields can be populated by clicking on the respective **Generate** button. This information will be automatically incorporated in any letters generated from SIMS .net.
5. If the contact is a parent or guardian who is entitled to vote in a ballot for a new governor to be elected, select the **Parental Ballot** check box.
6. In the **Relationship Details** panel, specify the **Contact Type** to identify the relationship of the contact with the child.
7. Select the **Parental Responsibility** check box if applicable.

8. If the contact has **Parental Responsibility** but does not live at the same address as the child, and they wish to receive **Reports** and/or **Correspondence**, select the related check boxes.
9. If a court order is in place restricting this contact's access to the child, select the **Court Order** check box.
10. Enter the **Priority** for this contact. The highest priority is **1**. The higher the priority, the more urgently the contact will be informed in the case of an emergency.
11. In the **Telephones and Email Addresses** panel, click the related **New** button and enter the required information. Click **OK**.

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- If the contact's address is not the same as the child's, modify it as required.
- Select a **First Language** for the contact and indicate if there is a **Translator Required**.
- Enter the contact's **Job Details**, if known. Click **Save** and then click **OK** to return to the **Pupil/Student Details** page.
- If the child is to be used as the **Mailing Point**, select the related check box.

For more information on **Copying** or **Cloning Contacts**, please refer to the *Managing Pupil/Students in SIMS .net* handbook which is accessed by clicking **Student** on the **Documentation** shortcuts panel in SIMS .net.

## Adding Medical Information

- Select the **Emergency Consent** check box if the parents have given the school consent to act in the case of an emergency.
- Enter the child's **NHS Number**, if known.
- Select their **Blood Group** from the drop-down list.
- Any **Dietary Needs** can be specified by selecting the appropriate check boxes.
- Select the child's doctor by clicking the **Browser** button adjacent to the **Medical Practice** panel.  
Enter any search criteria then click the **Search** button. Highlight the relevant doctor and click **OK** to select them.
- Enter any **Medical Notes** and/or attach any documents such as a note about medication, **Medical Conditions**, e.g. asthma and **Medical Events**, e.g. vaccination, accident, etc. by clicking on the related **New** button.

## Adding Ethnic/Cultural Information

- In the **Ethnic/Cultural** panel, select the child's **Ethnicity**, **Home Language**, **Mother Tongue**, **National Identity**, **Ethnic Data Source**, **Religion**, **English Additional Language** applies to the child and whether the child Speaks Welsh (Welsh schools will see additional data fields).

- Add the **Nationality and Passport Details** by clicking the **New** button. Click the **Browse** button and highlight the relevant **Nation** from the list then click **OK**.
- Enter the **Passport Number** and the **Issue, Expiry** and/or **Visa Expiry** dates.
- Enter the **Name on Passport**. Click **OK**.

## Adding Additional Information

- In the **Additional Information** panel, select the most usual meal type to be taken by the child from the **Meals** list box, e.g. Free Meal, Sandwiches, etc.
- If the child lives in a different LA, the school can claim the cost of education from that LA. Click the **Browser** button adjacent to the **Recoupment** field, to open the **Select Local Authority** dialog.  
Enter the **LA name**, **LA number** and click the **Search** button to find the LA. Click **OK** to save the details.
- Select the most frequent **Mode of travel** (select one check box only) and then select the **Route** travelled, if applicable, from the drop-down list. Select the **LA Provided Transport** check box, if applicable.
- If the child is **Eligible for Free Meals**, click the **New** button. Enter the **Start Date** and **End Date** for the free meal period if known.
- Welsh Primary schools can record individual child's **Eligibility for**

**Free School Milk** by clicking the **New** button. Enter the **Start Date** and **End Date** for the **Free School Milk** period. Click **OK**.

- Linked Agencies** and **Agents** can be added by clicking on the respective **New** buttons. Search for and select the required Agency/Agent and click the **OK** button. Enter any other details required.
- Click the **Save** button to save the details.

## Adding Welfare Details

- If the child is in care, click the **New** button to open the **Add/Edit In Care Details** dialog. Enter the **Start Date** and **End Date** for the In Care period.
- Click the **Browser** button adjacent to the **Care Authority** field. Search for the relevant **Care Authority** and click **OK** to return to the **Add/Edit In Care Details** dialog. Click **OK** to save the details.
- Click the **New** button to open the **Add Personal Education Plan** dialog. Enter the **Start Date** and **End Date** during which the PEP applies.
- Enter any relevant **Comments** that relate to the issue of the PEP.
- Click **OK** to save the details and activate the **Plan Details** panel.
- Click the **New** button. Enter the individual's **Surname** and **Forename** or select their **Role** from the drop-down list. Click the **Search** button.
- Highlight the required person(s) from the list and click **OK**.
- Click the **New** button to open the **Add/Edit Note /Document** dialog.
- Attach any relevant documents and click the **OK** button.
- Click the **OK** button on the **Add/Edit In Care Details** dialog.
- Click the **Save** button on the **Pupil/Student Details** page to save all the details entered.

## Adding School History

Any historical school information available for the child you are adding can be recorded in the **School History** panel. For more information please refer to the *Managing Pupil/Students in SIMS .net handbook*, accessible from the **Documentation** Shortcuts panel.

## Adding User Defined Fields

For more information, please refer to the *School Setup handbook*, which is accessed by clicking **Schools** on the **Documentation** shortcuts panel in SIMS .net.

This guide is based on the software version (7.78) in use at the time of publication. For details of the changes to the software, please refer to the associated handbook and online help file.

For further copies of this, or other Quick Reference Sheets, please email publications@capita.co.uk.

For information on available training courses, please contact Capita Professional Services on 01234 838080 or email profserv@capita.co.uk.

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