

# Integris - Creating a Census Return – Summer

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## Pre-census preparations

Before generating your Summer Census, the following items should be prepared in Speed Edit

Step 1) From the **Modules** tab, select **Administration | Speed Edit**

Step 2) From the drop-down list, select and update the following items:

- School Lunch taken on Census Day (Universal Infant FSM) – Reception, Y1 and Y2 only ([see Appendix A](#))
- Hours at setting (Nursery pupils only) ([see Appendix B](#))
- Funded hours (Nursery pupils only) – maximum of 15 hours ([see Appendix C](#))
- Extended childcare hours (Nursery pupils only) – maximum of 15 hours ([see Appendix D](#))
- Eligibility code (previously 30-hour code) – to be provided in conjunction with extended childcare hours ([see Appendix D](#))
- Learner Funding and Monitoring (FAM) ([see Appendix E](#))
- Alternative Provision Placements (all schools except Nursery Schools) (see [Appendix F](#))

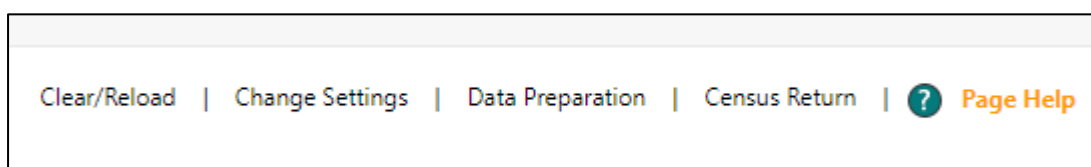
Alternatively, these items can be edited in the ‘**Additional**’ tab of the student record, or for the FAM item, in the ‘**Entitlement**’ tab.

## Check the status of census

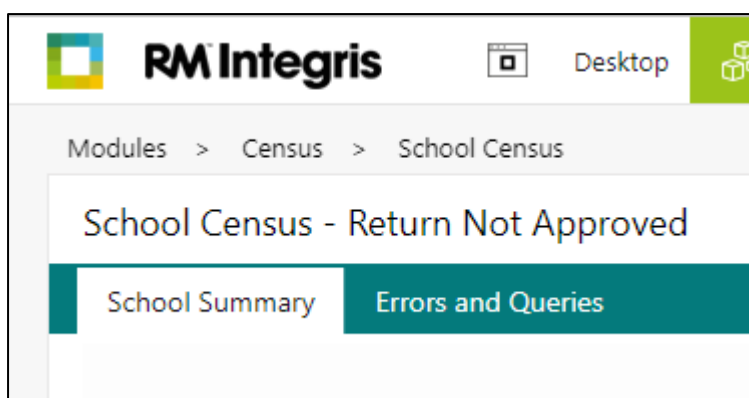
Step 1) From the **Modules** tab, select **Census | School Census**

Details of the appropriate census will be displayed in the ‘Current Census’ settings on the first screen. The status of the latest census will be displayed on the right-hand side of the screen.

Step 2) Click on the **Census Return** option top right. (You can create as many versions as you need to before approving one for submission.)



A screen like the one in the next screen shot will appear saying **School Census – Return Not Approved** at the top left of the screen.



Step 3) The **School Summary tab** is selected by default – the easiest way to view this is to use the Print option, top right of the screen.. Check through all the tables in the summary and make sure that the figures look correct.

The following table may be particularly useful

| <a href="#">Table number on school summary</a>                                     | <a href="#">.comments</a>  |
|--|--|
| <b>Table 5: Specific Types of Pupil on Roll</b>                                    | This is where you can check the number of pupils recorded as being eligible for FSM, those who have been flagged as receiving Top-Up funding, and any who are flagged as having post looked after arrangements.  |
| <b>Table 6: Funded and extended hours for pupils on roll aged 2, 3 and 4 years</b> | Check here that any relevant pupils have the appropriate hours at setting and funded hours recorded. Update in Speed Edit.   |
| <b>Table 10: Pupils on roll with SEN Provision</b>                                 | Check your SEN figures are correct in this table.  |
| <b>Table 12: Number of exclusions</b>  | Check here for any suspensions or permanent exclusions recorded during the previous autumn and spring terms.   |
| <b>Table 25: Universal infant school meals</b>                                     | These figures will be finalised on census day, but to prepare, use the Speed Edit facility to make the default value 'Yes' for all R, Y1 and Y2 pupils, then edit to 'No' on the day for those pupils who do not take a meal. See <a href="#">Appendix A</a> for how to record UIFSM using Speed Edit. |



## Correct errors/queries and approve return

Step 1) The **Errors and Queries** tab will give details of errors and the **Solution/Link** column on the right shows the best route to make amendments in each case, with a link to individual student records or Speed Edit if appropriate. When you have made amendments using one of the links, you can click on **'Refresh'** to check that the error no longer appears in the list.

| Errors/Queries | Description  | Location | Solution / Link  |
|----------------|--|----------|--|
| 130            | DFE number and phase are not consistent.   |          | If you need to change your school code, you will need a new schema so that your census return is run on your new data only. Please see the RM Knowledge Library at <a href="http://www.rm.com/support">www.rm.com/support</a> for further information. |
| 564 Q          | Please check: primary admission appeals figures should be provided and are expected to be greater than zero. |          | Edit Census School Follow the link to submit the number of appeals the school has had, this is usually a number greater than 0.  |
| 566 Q          | Please check: infant admissions appeals figures should be provided and are expected to be greater than zero. |          | Edit Census School Follow the link to submit the number of appeals the school has had, this is   |

Again, you can use the Print option, top right, to make viewing easier.



Hover the mouse over the Solution/Link column. In the example above, 'Edit School' would become a blue hyperlink, and clicking on it takes you to the area where the amendment needs to be made.

Make the amendments, SAVE the changes, then click on **'Refresh'** (top right of screen) to see that the errors/queries reduce accordingly.

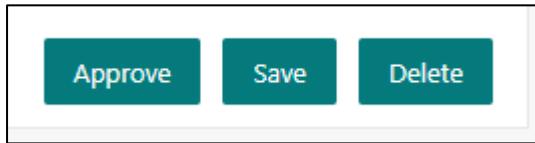
Step 2) Work through all the errors and queries until there are **zero errors**, and as few queries as are appropriate for your school. Click on **Save** – bottom right of the screen – and print off the School Summary for the Head Teacher to check.



Step 3) Next time you log in to the Census module the status of your census will have changed to **'Awaiting Approval'** – to continue to approval, or to make further amendments, click on the **'View'** button.



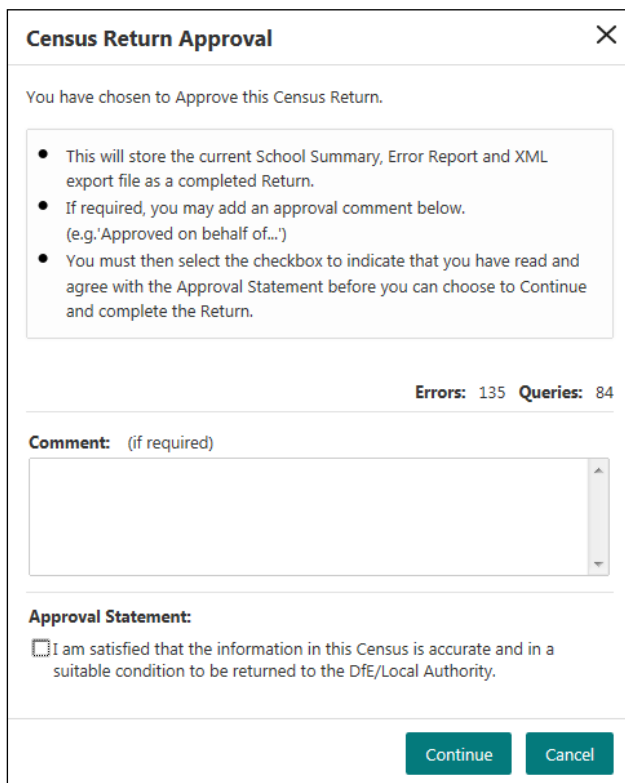
Step 4) From this screen you can choose the Errors and Queries tab to make further amendments, or go straight to **Approve**. If you make further amendments, click on the Refresh button, and SAVE the amended version.



Please note the new 'Page Help' option top right of the screen – for the errors and queries page, this will list any currently known system errors or problems.



Step 5) Clicking on the Approve button will generate the following message:



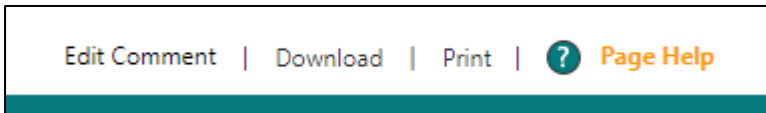
A summary of errors and queries will be displayed here... Your return should have zero errors!

There is a comment box available – you may wish to use this to note that the census was approved by the Head Teacher.

You will need to tick the Approval Statement box before you click on '**Continue**'.

Clicking on '**Continue**' will take you to the following screen

Step 6) From this screen, click on the **Download** option (top right), and choose 'Census Return File'.



Choose the '**Save as**' option, and then save the zipped census file to an appropriate location on your computer.

Don't forget to unzip the file before trying to load it to COLLECT, or you will get an error message!

You may also wish to save an electronic copy of your Census Summary by choosing the School Summary Report option from the Downloads section.

### Uploading return to the DfE

Step 1) Log on to the **DfE Sign-in website**, and upload your unzipped census file to the **COLLECT** website in the usual way.

<https://services.signin.education.gov.uk/>

**Please be aware that even though you may have zero errors and queries in the return generated in your RM Integris software, COLLECT runs slightly different validations. The current census will be compared to last term's, so please check any errors or queries that appear as a result of this validation and provide an appropriate note against each one.**

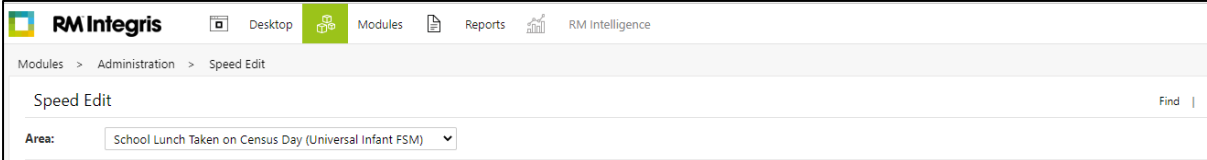


## Appendices

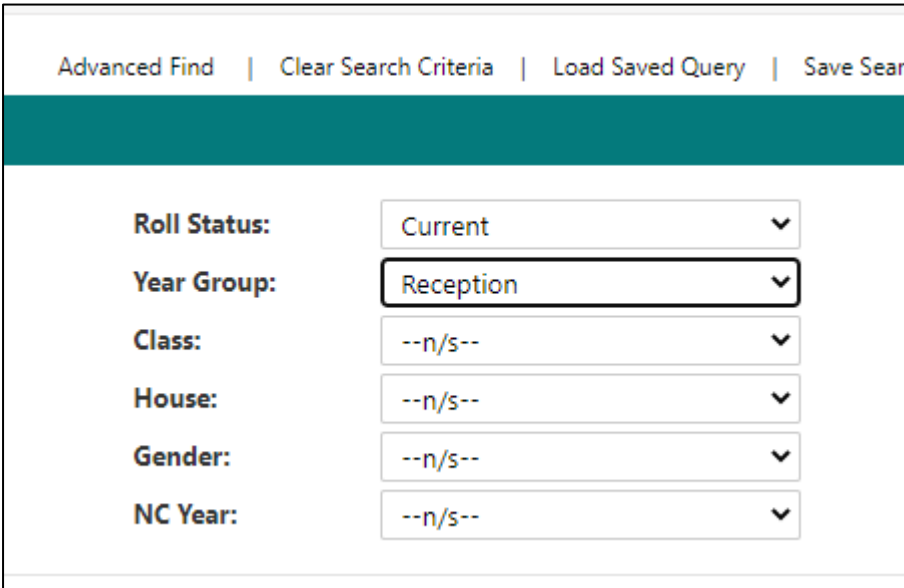
### Appendix A: Recording Universal Free School Meals in Speed Edit

Step 1) In Modules, go to **Administration | Speed Edit**, and from the **Area** drop down list, select **School Lunch Taken on Census Day (Universal Infant FSM)**.

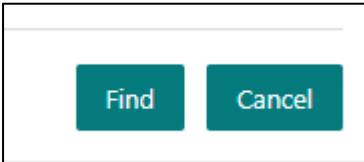
Step 2) Click on **Find**



Step 3) From the search screen that appears choose your Reception year group from the drop down list.



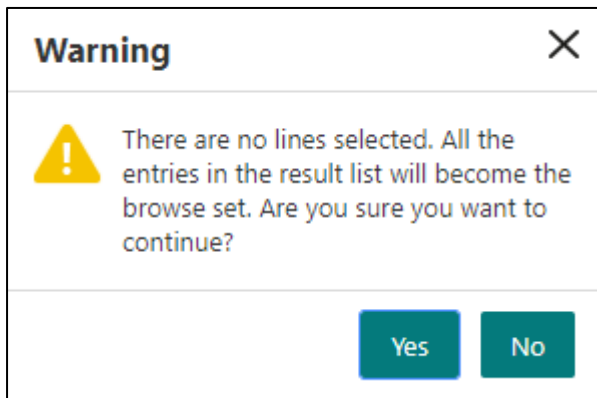
Step 4) Click on **find**



Step 5) Click on **Select**



Step 6) Click on **Yes** to choose all the pupils



Step 7) Now click on **Select All** (next to 'Find' at the top of the screen) so that all pupils are highlighted in blue.



Step 8) Then tick the **'New Value'** box (bottom left) and **'Apply Changes'**.



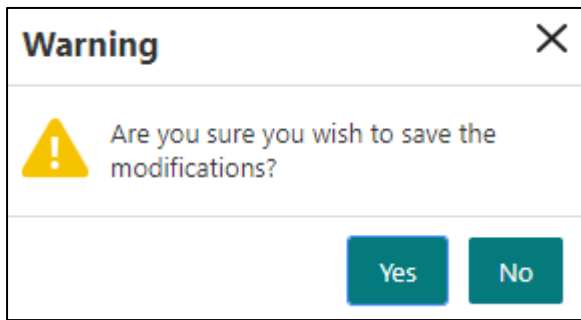
Step 9) The Value column will now say 'Yes' for all pupils, and the 'Status' column shows 'M' meaning that the screen has been modified.

| Value | Status |
|-------|--------|
| Yes   | M      |
| Yes   | M      |
| Yes   | M      |
| Yes   | M      |

Step 10) Click on **Save**



Step 11) Click on **Yes** – the value will remain as Yes, and the ‘M’ will have disappeared.



Step 12) Repeat for years 1 and 2.

### To change individual pupils from ‘Yes’ to ‘No’ on Census Day

Step 1) Follow Steps 1 to 4 above

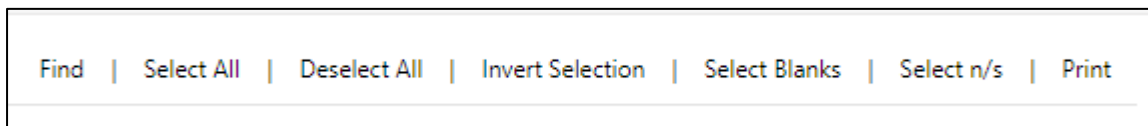
Step 5) From the list of pupils that appear use the Ctrl key to cherry pick those who did not take a meal on the day

| Reference | Surname | Known Name |
|-----------|---------|------------|
| 1494      | Adams   | Jenny      |
| 59        | Allen   | Chloe      |
| 1415      | Alsbury | Stephen    |
| 26        | Bailey  | Thomas     |
| 1567      | Baker   | Bobby      |
| 63        | Bates   | Julia      |
| 58        | Blake   | Oliver     |

Step 6) Click on **Select**.



Step 7) The selected pupils will appear on the next screen, and to change the value from ‘Yes’ to ‘No’, click on **‘Select All’** to highlight the pupils in blue



Step 8) Make sure there is **no tick in the ‘New Value’** box, click **Apply Changes**

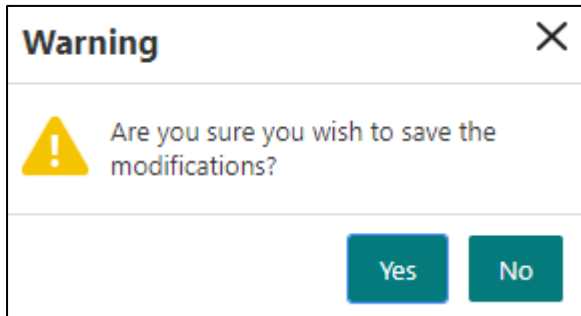




Step 9) Click on **Save**.



Step 10) Click on **Yes**

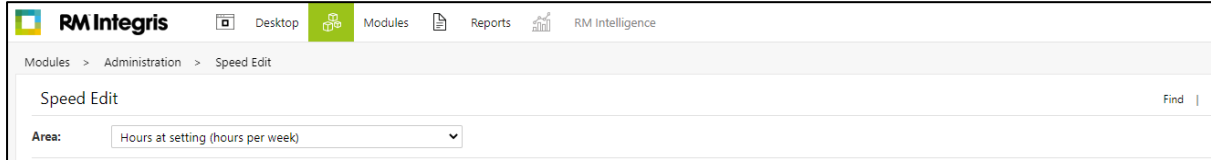


Step 11) Repeat for other year groups as appropriate.

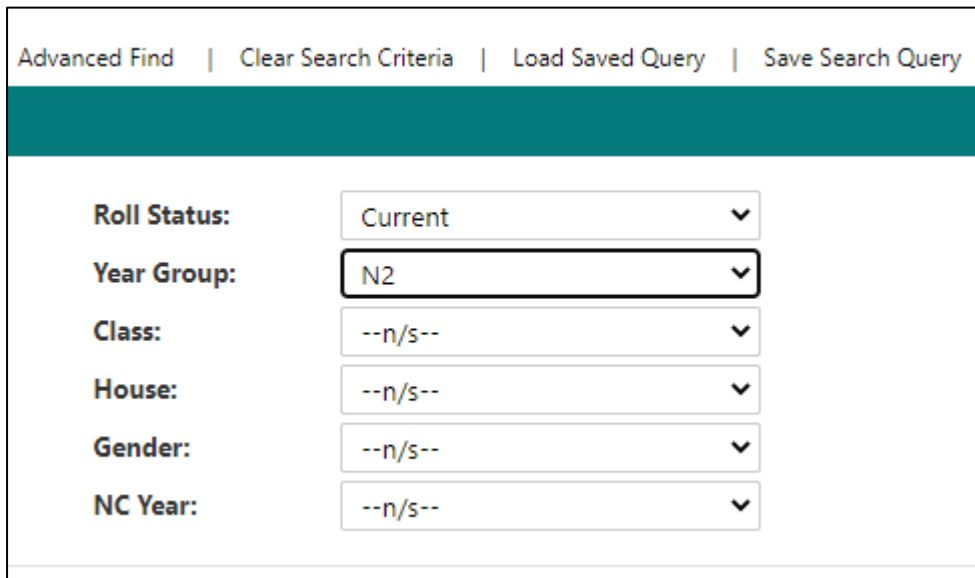
## Appendix B: Recording Hours at Setting in Speed Edit

Step 1) In Modules, go to **Administration > Speed Edit**, and from the **Area** drop down list, select **Hours at setting (hours per week)**.

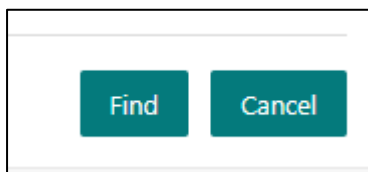
Step 2) Click on **Find**.



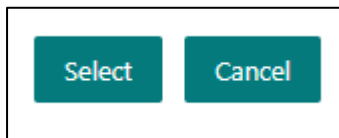
Step 3) From the search screen that appears choose a Nursery year group from the drop down list.



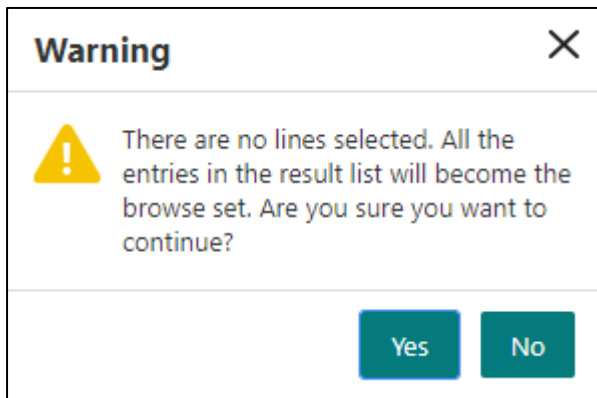
Step 4) Click on **Find**



Step 5) Click on **Select**



Step 6) Click on **Yes** to choose all the pupils.



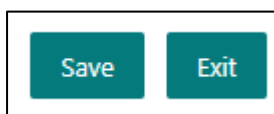
Step 7) Now click on **'Select All'** (next to 'Find' at the top of the screen) so that all pupils are highlighted in blue.



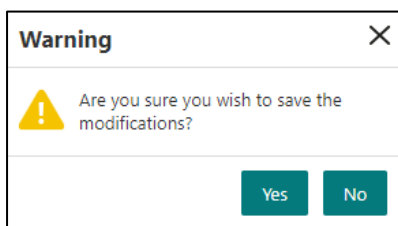
Step 8) Then in the 'New Value' box type the appropriate hours to two decimal places, for example 15.00, then **'Apply changes'**



Step 9) Click on **Save**. If any pupils attend for more or less than 15 hours, these can be amended individually.



Step 10) Click on **Yes**

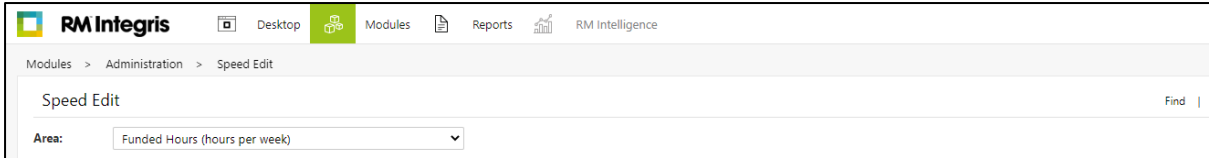


Step 11) If you have more than one nursery group then repeat steps 2 to 10 above

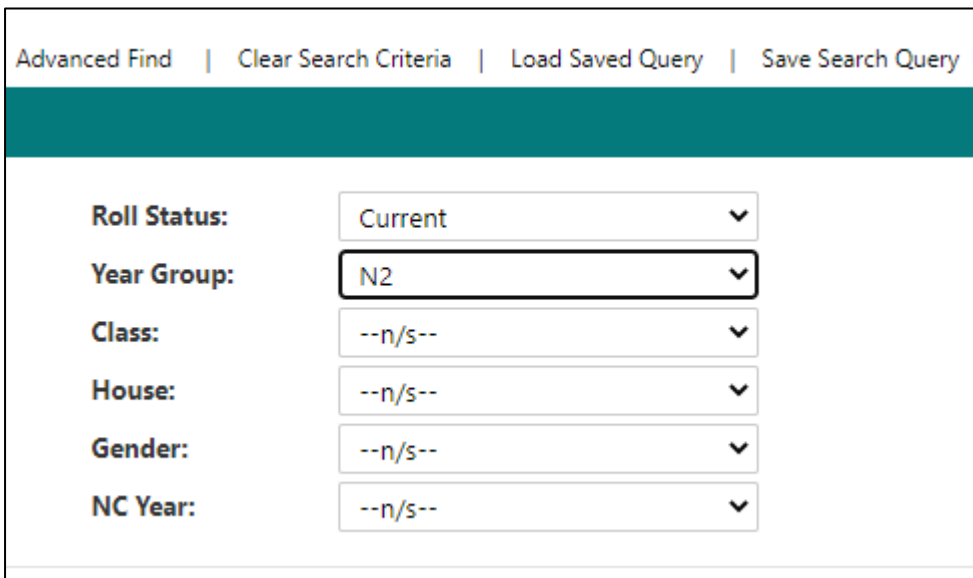
## Appendix C: Recording Funded Hours in Speed Edit

Step 1) In Modules, go to **Administration > Speed Edit**, and from the **Area** drop down list, select **Funded Hours (hours per week)**.

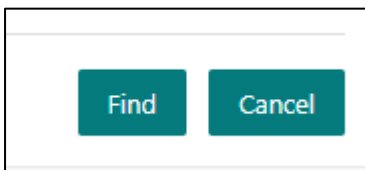
Step 2) Click on **Find**



Step 3) From the search screen that appears choose a Nursery year group from the drop down list.



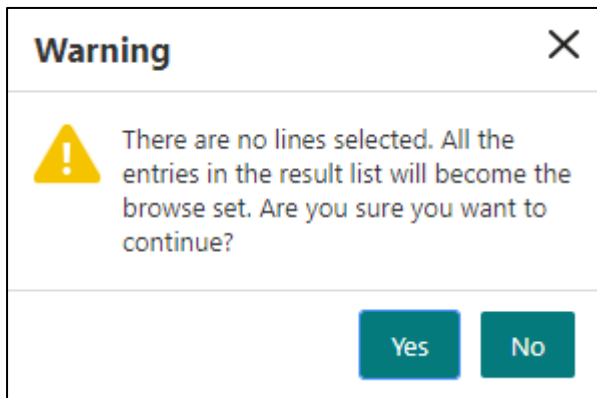
Step 4) Click on **Find**



Step 5) Click on **Select**



Step 6) Click **Yes** to choose all the pupils.



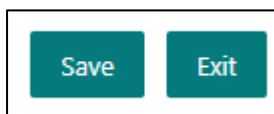
Step 7) Now click on **Select All** (next to 'Find' at the top of the screen) so that all pupils are highlighted in blue.



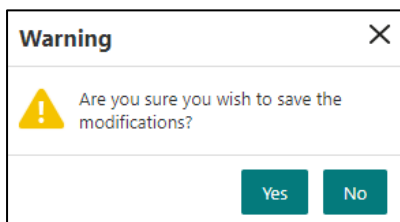
Step 8) Then in the 'New Value' box type 15.00, then **Apply changes**. If any pupils attend and/or are funded for less than 15 hours, these can be amended individually.



Step 9) Click on **Save**



Step 10) Click on **Yes**



Step 11) If you have more than one nursery group then repeat steps 2 to 10 above

**Please note that funded hours must be equal to, or less than the hours at setting.**

## Appendix D: Recording Extended Funded Hours and the eligibility code (previously 30-hour code)

BEFORE ENTERING THIS INFORMATION IN THE CENSUS THE ELIGIBILITY CODE MUST BE VERIFIED BY ENTERING THE DETAILS IN THE FIS SYNERGY PORTAL.

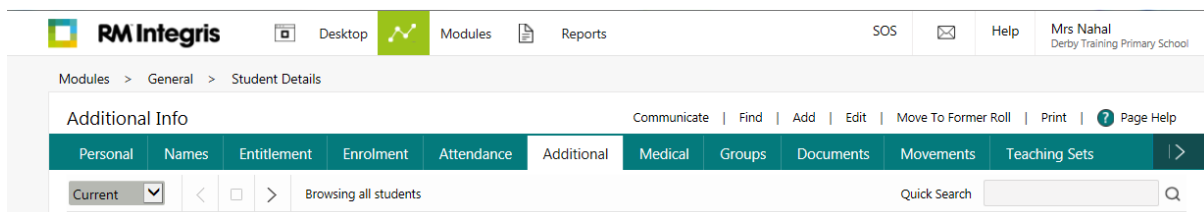
Information entered in the census MUST match the corresponding information in the FIS Portal.

Both these items can be recorded using the Speed Edit facility by selecting **Extended Childcare hours (hours per week)** from the dropdown list and using the same method as described in previous appendices.

Alternatively they can be updated in a pupil's individual record as follows:

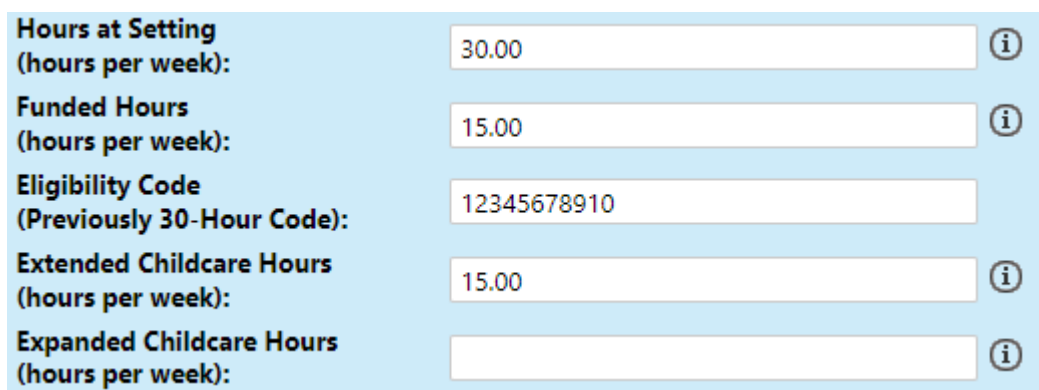
Step 1) Go to **Modules | General | Student Details**

Step 2) In the student record, go to the **'Additional'** tab, and click on 'Edit'.



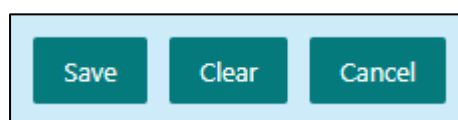
The screenshot shows the RM Integris software interface. At the top, there is a navigation bar with 'RM Integris' logo, 'Desktop', 'Modules', and 'Reports' tabs. On the right, there are links for 'SOS', 'Help', and the user name 'Mrs Nahal Derby Training Primary School'. Below the navigation bar, the breadcrumb trail reads 'Modules > General > Student Details'. The main content area is titled 'Additional Info' and has a sub-menu with tabs: 'Personal', 'Names', 'Entitlement', 'Enrolment', 'Attendance', 'Additional' (selected), 'Medical', 'Groups', 'Documents', 'Movements', and 'Teaching Sets'. Below the tabs, there is a search bar with 'Current' selected and 'Browsing all students' text. A 'Quick Search' field is also visible on the right.

Step 3) Proceed to add the appropriate information to the eligibility code and extended childcare hours boxes as in the example below. Expanded Childcare hours is new to summer 2024 census. It can be used to record up to 15hrs for 2-year-olds with working parents



The screenshot shows a form with five rows of input fields. Each row has a label on the left and an input field on the right with an information icon (i) to its right. The rows are: 'Hours at Setting (hours per week):' with the value '30.00'; 'Funded Hours (hours per week):' with the value '15.00'; 'Eligibility Code (Previously 30-Hour Code):' with the value '12345678910'; 'Extended Childcare Hours (hours per week):' with the value '15.00'; and 'Expanded Childcare Hours (hours per week):' which is currently empty.

Step 4) Click on **Save**.



The screenshot shows three buttons: 'Save', 'Clear', and 'Cancel', arranged horizontally in a light blue box.

## Appendix E: Recording Learner Funding and Monitoring (FAM) in Speed Edit

The COVID catch up funding is available for all students under the age of 19 years old. This funding is available to support children and to help them catch up with missed learning caused by Coronavirus (COVID19).

For students under 16 years of age there is a tick box to confirm they are in receipt of a school-led tutor programme and how many hours were completed to nearest 0.5\*

There are two ways to update these fields’.

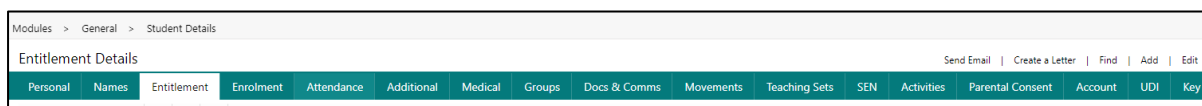
- [Option 1 – edit direct in Student Details](#)
- [Option 2 – via Speed Edit](#)

### *Option 1 – edit direct in student details*

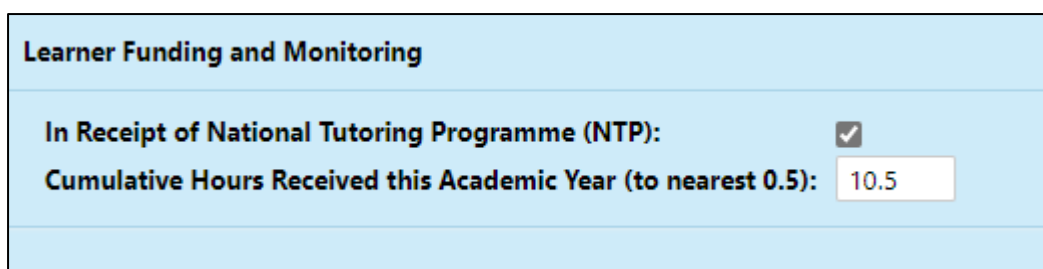
You can edit the COVID Catchup Funding field in individual pupil records as follows:

Step 1) Go to **Modules | General | Student details** and search for the pupil you want to edit

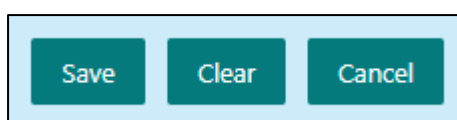
Step 2) Choose the **Entitlement** Tab and click on **Edit**, top right.



Step 3) Tick the **In Receipt of National Tutoring Programme (NTP)** box and then enter the number of hours received to the nearest 0.5 into the **Cumulative hours received this Academic Year (to the nearest 0.5)** field. You should only be recording hours from the start of the academic year 2023/2024.

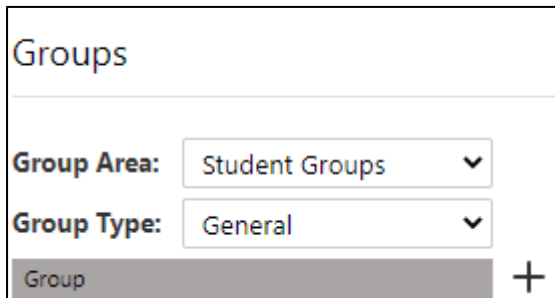


Step 4) Click on **Save**.



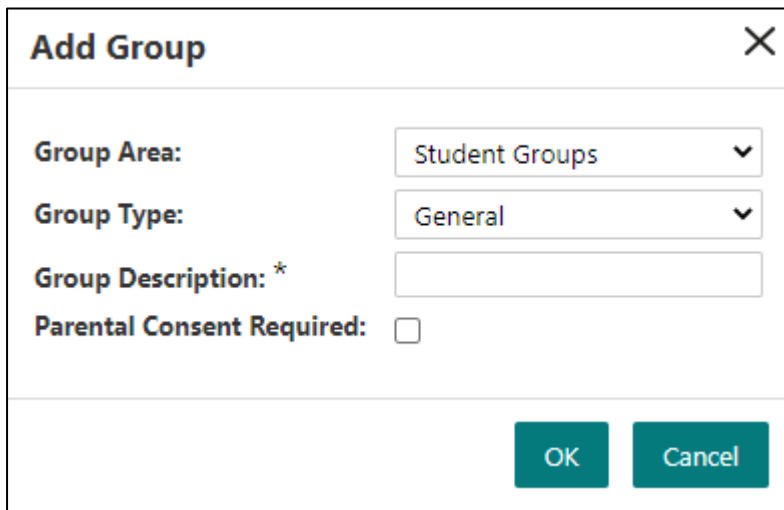
*Option 2 – via speed edit*

Step 1) Create a group for your COVID catchup pupils. Select **Modules | General | Groups**. Make sure that the **Group Area** says **Student Groups**, and choose '**General**' from the **Group Type** drop down list.



The screenshot shows a 'Groups' interface. At the top, the title 'Groups' is displayed. Below it, there are two dropdown menus: 'Group Area' is set to 'Student Groups' and 'Group Type' is set to 'General'. At the bottom of the interface, there is a table with one row containing the text 'Group' and a plus sign icon to its right.

Step 2) Click on the **plus** sign to open up the Add Group box



The screenshot shows a dialog box titled 'Add Group' with a close button (X) in the top right corner. It contains four fields: 'Group Area' (dropdown menu set to 'Student Groups'), 'Group Type' (dropdown menu set to 'General'), 'Group Description: \*' (text input field), and 'Parental Consent Required:' (checkbox, currently unchecked). At the bottom right, there are two buttons: 'OK' and 'Cancel'.

Step 3) In the 'Group description' field type **COVID catch up** and then click on **OK**. This new group should now appear in the list.

Step 4) Highlight the COVID group and click on the plus icon to the far right of the screen



The screenshot shows a table with the following structure:

| Student(s) |         |            |   |
|------------|---------|------------|---|
| Reference  | Surname | First Name | + |

Step 5) In the Student Search box, click on **Find**



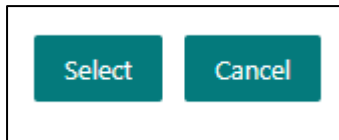
The screenshot shows a search box with two buttons: 'Find' and 'Cancel'.

Step 6) From the list of pupils that appear use the Ctrl key to cherry pick those who you want to include in this group

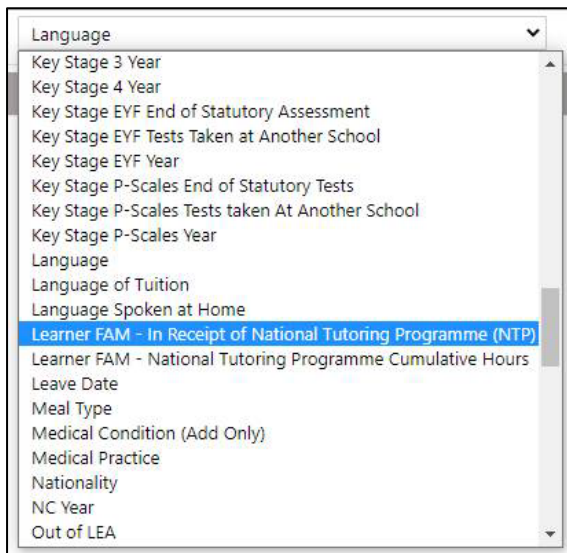


| Reference | Surname | Known Name |
|-----------|---------|------------|
| 1494      | Adams   | Jenny      |
| 59        | Allen   | Chloe      |
| 1415      | Alsbury | Stephen    |
| 26        | Bailey  | Thomas     |
| 1567      | Baker   | Bobby      |
| 63        | Bates   | Julia      |
| 59        | Blake   | Greg       |

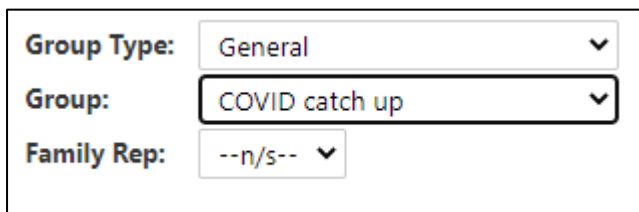
Step 7) Click on **Select**



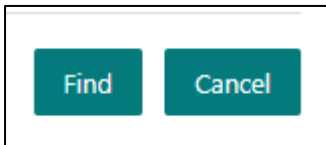
Step 8) In Modules, go to **Administration | Speed Edit**, and from the **Area** drop down list, select **Learner FAM – in receipt of National Tutoring Programme (NTP)**.



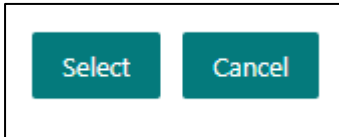
Step 9) You will then be able to click on 'Find' and from the search screen that appears, select the group you have created.



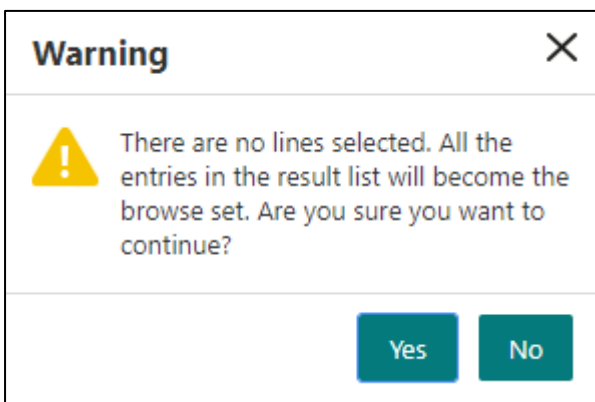
Step 10) Click on **Find**



Step 11) Click on **Select**



Step 12) Click on **Yes** to choose all the pupils.



Step 13) Now click on '**Select All**' (next to 'Find' at the top of the screen) so that all pupils are highlighted in blue.



Step 14) Then tick the 'New Value' box , **Apply changes**




Step 15) Click on **Save**



Step 16) Click **Yes**

**Warning** ✕

 Are you sure you wish to save the modifications?



## Appendix F: Alternative Provision Placements

Alternative Provision (AP) placements will be mandatory for all schools except Nursery Schools

### School arranged alternative provision module

This records information about Alternative Placements (AP) arranged by state-funded schools, including AP schools themselves, e.g., PRUs or AP Schools, in state-funded and independent settings. The commissioning/arranging school (including where the PRU/AP school is acting as a commissioner) should record and return these data items as part of the School Census. The placement provider should record data in the Movement Tab (see below)

Where alternative provision has been arranged by the local authority, for example for children with medical conditions, but the pupil also remains dual registered with the mainstream school and the PRU/AP school, then the mainstream school should complete the data items. This is found on the Movements tab of student details.

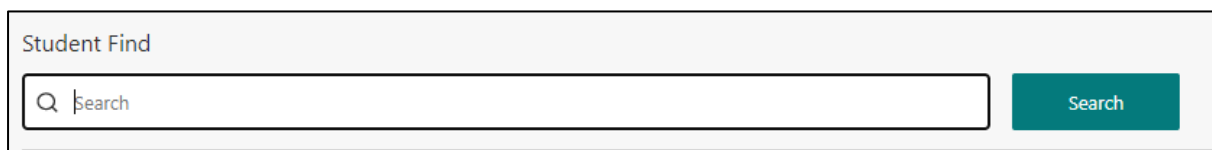
This section shows you how to:

- [Add a provision](#)
- [Edit a provision](#)
- [Delete a provision](#)

#### *To add a provision*

Step 1) In Modules, go to **Modules | General | Student Details**

Step 2) Type surname of child and then click on **Search**



A screenshot of a search interface. At the top left, it says "Student Find". Below this is a search input field with a magnifying glass icon and the placeholder text "Search". To the right of the input field is a teal button with the text "Search".

Step 3) Once in pupil record, click on the **Movements** tab



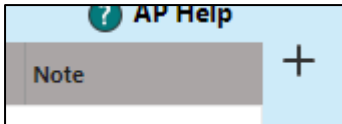
A screenshot of a navigation bar for "Movement History". It contains several tabs: "Personal", "Names", "Entitlement", "Enrolment", "Attendance", "Additional", "Medical", "Groups", "Docs & Comms", and "Movements". The "Movements" tab is highlighted with a teal background.

Step 4) Click on **edit**



A screenshot of a horizontal menu with several options: "Find", "Add", "Edit", "Move To Former Roll", "Print", and "Page Help". The "Page Help" option is accompanied by a question mark icon.

Step 5) Click the + to add a new placement provision for the student



Step 6) The 'School arranged alternative provision placement screen' appears

A screenshot of a web form titled 'Add School Arranged Alternative Provision Placement'. The form is enclosed in a window with a close button (X) in the top right corner. It contains several input fields: 'Placement Location' with sub-fields for 'URN:' and 'UKPRN:', each with a search icon and a link ('Find a URN via GIAS' and 'Find a UKPRN via UKRLP' respectively); 'Type of Setting:' with a dropdown menu; 'Date of Entry:' and 'Date of Leaving:' with calendar icons; 'SEN Provision on Entry:' and 'SEN Provision on Leaving:' with dropdown menus; 'Placement Attendance Pattern:' with a dropdown menu; 'Placement Reason:' with a dropdown menu; and a 'Note:' field with the subtext '(optional, for your use)'. At the bottom right are 'OK' and 'Cancel' buttons.

Step 7) Complete the details. The 'Note' field is not mandatory. You can use the two hyperlinks to find a URN or UKPRN if required. If you have selected to use the 'Type of Setting' field, two new additional mandatory fields will be shown:

A close-up screenshot of the 'Type of Setting:' dropdown menu, which is currently set to 'Non-maintained further education'. Below the dropdown are two new input fields: 'Companies House Company Number:' with a search icon and a link 'Find via Companies House', and 'Placement Postcode:'.

Step 8) The data required for these fields is:

- The Companies House Company Number for the settings in which the child has taken up the Alternative Provision Placement
- The setting's postcode within which the pupil has taken up an alternative provision placement

Step 9) Click on **OK**



Step 10) Click on **Save**

Save Cancel

*To edit a provision*

Step 1) In Modules, go to **Modules | General | Student Details**

Step 2) Type surname of child and then click on **Search**

Student Find

Q search Search

Step 3) Once in pupil record, click on the **Movements** tab



Movement History

Personal Names Entitlement Enrolment Attendance Additional Medical Groups Docs & Comms **Movements**

Step 4) Click on **edit**

Find | Add | **Edit** | Move To Former Roll | Print | ? Page Help


Step 5) Select the relevant placement record you want to edit and then click the pencil icon to edit.

| AP Help                          |            |      | +  |
|----------------------------------|------------|------|--|
| SEN Provision on Entry / Leaving | Attendance | Note |  |
| N/N                              | PT (2)     |      | <br> |


Step 6) Make any changes required and click **OK** to close and save the AP details

Edit School Arranged Alternative Provision Placement


Placement Location



URN: 123437  [Find a URN via GIAS](#)

--Or--

UKPRN:   [Find a UKPRN via UKRLP](#)


--Or--

Type of Setting:  

Date of Entry: 07 Nov 2022  Date of Leaving: 12 Dec 2022 

SEN Provision on Entry: N  SEN Provision on Leaving: N

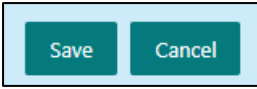
Placement Attendance Pattern: Part Time  Placement Sessions per Week: 2

Placement Reason: Off site placement for behavioural support 

Note: (optional, for your use)

OK Cancel

Step 7) Click on **Save**



*To delete a provision*

Step 1) In Modules, go to **Modules | General | Student Details**

Step 2) Type surname of child and then click on **Search**

A search interface titled 'Student Find'. It features a text input field with a magnifying glass icon and the placeholder text 'Search'. To the right of the input field is a teal 'Search' button.

Step 3) Once in pupil record, click on the **Movements** tab

A horizontal menu titled 'Movement History'. It contains several tabs: 'Personal', 'Names', 'Entitlement', 'Enrolment', 'Attendance', 'Additional', 'Medical', 'Groups', 'Docs & Comms', and 'Movements'. The 'Movements' tab is highlighted in teal.

Step 4) Click on **edit**

A horizontal menu with several options: 'Find', 'Add', 'Edit', 'Move To Former Roll', 'Print', and 'Page Help'. The 'Page Help' option is accompanied by a question mark icon.

Step 5) Select the relevant placement record you want to delete and then click the bin icon to delete.

A table with three columns: 'SEN Provision on Entry / Leaving', 'Attendance', and 'Note'. The first row contains the values 'N/N', 'PT (2)', and an empty cell. To the right of the table is a vertical toolbar with a plus sign, a pencil icon, and a trash bin icon.

Step 6) Click **Yes**

An 'Information' dialog box with a close button (X) in the top right corner. It contains an information icon (i) and the text 'Are you sure you want to delete this entry?'. At the bottom, there are two buttons: 'Yes' and 'No'.

Step 7) Click on **Save**

