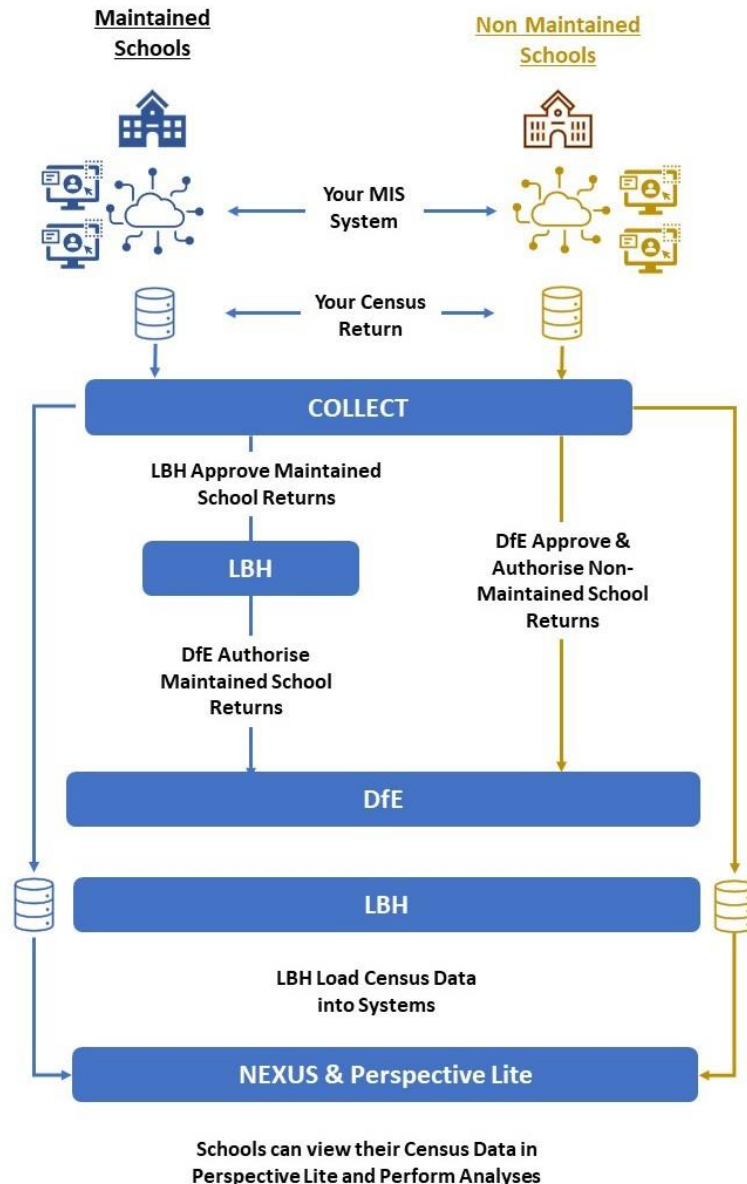


### How to upload your School Census return

The general workflow of a school census return is shown below, it takes the flow from your school preparing the census and you being able to interrogate and analyse the general data, attendance, and exclusions in Perspective Lite.



Before starting the process of preparing your census return ensure that your MIS software and configuration data is up to date. Contact your MIS supplier support organisation. Use your MIS system prepare your census return.

Fix all the errors/queries reported by your MIS system. Although your MIS supplier and the DfE's software developers work from the same business specification, they are different people and will produce slightly different software. What works in your solution may be different in COLLECT, and

vice-versa. Use the attached business and technical specifications and validation rules to help resolve errors and queries.

Make sure Your school census show be uploaded to COLLECT, please **do not** send it via email.

Your school census return must be uploaded via the COLLECT Portal, only as described:

### *Download school census data file from the MIS*

The school census data return file will automatically be named 312xxxx\_SC2\_312LL22\_nnn.xml (where **xxxx** is your school's DfE number and **nnn** is the census file's version number).

Save the file to a suitable folder on your school server, (unzipping it if necessary).

### *Login to the live version of COLLECT via the DfE Sign-in portal*

#### **DfE Sign-in portal link**

If there are issues logging in, please contact your in-school "approver" who may be able to help. If the approver cannot help, use the **DfE service request on their online form**. The DfE say such a request can take up to 5 working days for them to respond to. We have never found this to be true.

### *3. Upload your data XML file onto COLLECT*

After you have downloaded the census data return file from your MIS, (which may need unzipping) then you must upload that census return ('.XML') file into COLLECT.

- When it finishes uploading and importing, go to the COLLECT page where the "upload return" button is, and look for the 'status', which should have immediately changed to say: "loaded and validated".
- Once "loaded and validated" the school must use the "**Open Return**" button, and then "**All Errors**" button, to see the list of COLLECT's Errors and Queries.
- Resolve all errors, and any queries that can be fixed, in your MIS, regenerating a new return file for uploading into COLLECT, until only any 'unresolvable' queries remain in COLLECT's 'All Errors' list.

### *4. Check the "All Errors" List for COLLECT Errors and Queries*

- Once "**loaded and validated**" the school must use the "**Open Return**" button, ignore the count of '**E**' and '**Q**', and instead use the "**All Errors**" button, to see the list of COLLECT Errors and Queries.
- Resolve all errors, and any queries that can be fixed, in your MIS, regenerating a new return file for uploading into COLLECT, until only any 'unresolvable' query remains in that '**All Errors**' list.

### *5. Once no errors and only unresolvable queries remain in COLLECT's All Errors list, generate, and check the MIS School Summary*

- The details in that School Summary must be carefully checked by the school, for the Head Teacher's 'sign off', being aware that **school funding could be affected by any inaccuracy in some of these figures**.
- The DfE advise schools to compare this term's summary to the report for the same term of the previous year, checking the figures are 'as the school would expect', in all tables, and

'sense checking' them too. We note this is not possible for this term, please check against figures against your Spring Census.

If there seems to be an issue with a figure in the report, first read the [DfE definition for the data item\(s\)](#) relevant to what is being counted and read about that table in the relevant report specification too.

- The school must use the relevant data item definition(s), and the relevant School Summary Report Specification's table definition and business rules sections, to establish if any further conditions impact on a count, leading to pupils being included/excluded from the figure.
- If the school's investigation of the School Summary leads to any data changes in the school MIS to fix data issues, then after the changes are saved, in the MIS, regenerate a new census return for COLLECT and repeat all COLLECT steps, including the 'All Errors list' checks.
- The sooner this step is completed, 'new' errors and/or queries may be caused by any 'new' data that is naturally being added to the MIS, after census date.

### *Once the latest version of the data has been in COLLECT overnight, Launch and check COLLECT reports carefully*

- Launch each COLLECT report (only once your return has been in COLLECT overnight) and resolve any issues found, back in the school MIS, and then, if any issues are found, after these changes are saved, in the MIS, regenerate a new census file for COLLECT and repeat all COLLECT steps, including the '**All Errors** list' checks.
- Some of the COLLECT reports have 'funding' in their name. The Head must be involved in checking details on all funding related, affecting school funding.
- If there are concerns about the funding report figures, and the school feels these need to be discussed with the LA, then these funding report enquiries would be directed to the LA's School Finance team.

### *Only once no issues remain, in Collect's 'All Errors' List, in the School Summary and in the overnight Reports – Add a single note containing explanations for all remaining queries*

- All remaining unresolvable queries must have one explanatory line each in your latest '**Return Note**', which schools add in COLLECT, at return level: the screen immediately after you "open (the) return". Start each query on a new line and start each line with that query's code.

### *In COLLECT press 'Submit Return'*

- Maintained schools must press the '**Submit Return**' button by the school deadline, (indicates Headteacher's sign off), so that we can 'approve' your return and work on any duplicates arising later. Academies do this for DfE directly. Until school presses '**Submit Return**' button in COLLECT, the LA cannot work on a return and the DfE can see it is still 'outstanding' (not yet 'signed off') in the DfE's view of COLLECT.
- The school is responsible for ensuring the School Census data is accurate and submitted on time. Ensuring the DfE's guidance has been followed regarding loading data into the MIS as well as GDPR and other regulations are followed, including a suitable privacy notice when pupils join school.

*Immediately after half term, recheck both COLLECT 'duplicates' reports, again for any new cases*

- Schools must check the COLLECT '**duplicates**' reports after May half-term, and if any new duplicates have arisen between schools.

The following reports can show potential issues that could impact your funding.

- **Pupil number report** – Provides a headcount of your pupils by NC year group, headcount of your pupils minus subsidiary registrations and the number of pupils that will be used in numerous funding streams and therefore will account for funded and extended hours and unresolved duplicate UPNs.
- **Duplicate unique pupil number (UPN) and duplicate pupil report** – The duplicate UPN report shows any pupils appearing on your census and that of another school where there is an invalid combination of enrolment statuses. Your funding may be affected if these remain unresolved at database closure. The duplicate pupil report identifies pupils whose personal details are the same, but the UPN differs.
- **Free school meals (FSM) report** – Allows schools to check the FSM eligibility data submitted in their census return. This report only refers to FSM eligibility reported in the current census and not the FSM ever measure used to allocate the pupil premium.
- **Universal infant free school meals** – Provides a breakdown of the infant pupils used in the universal infant free school meals funding calculation.
- **Zero funded hours** – Highlights the number of early years pupils who have 'zero' funded hours recorded on the school census return. Funded hours are used to calculate the early years block of the dedicated school's grant.
- **Pupil premium** – Allows schools to check and verify the data in their spring school census, which will feed into the deprivation, service child and post looked after children report elements of the pupil premium allocation.
- **Early years pupil premium** – Allows schools to check and verify the data in their spring school census, which are used for the early years' pupil premium allocations.
- **Learner funding and monitoring (FAM)** – Allows schools to check and verify the data returned in each termly census on pupils in receipt of specific elements of the education recovery package.
- **Post-16 funding reports** – Schools will also be able to access a series of ESFA funding reports in the autumn census. These reports show schools the data used for post-16 funding calculations:
  - funded student summary report
  - student detail report
  - 16 to 19 maths and English GCSE status by student

In the rare circumstances there are issues with your return please contact the Business and Performance Team for assistance.

END of DOCUMENT