

How to Set-up or Amend the SEN Matrix Band Descriptions for Mainstream Schools in SIMS

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Introduction

From September 2018 the following changes will apply to the mainstream funding descriptions on the local authority database (please see VSB 2018/269, The Revised East Sussex SEN Matrix) :

Children and Young People previously recorded as:

Sustained & Comprehensive A have transferred to **Targeted Support A**

Sustained & Comprehensive B have transferred to **Targeted Support B**

Significant & Personalised Support A have transferred to **Enhanced Support A**

Significant & Personalised Support B have transferred to **Enhanced Support B**

The top-up values have not changed.

- **Targeted:** Children require a level of additional or different SEN support at times throughout the day. The level of resourcing may exceed what the school or college can provide from its budget.

Targeted A		Targeted B	
Monthly (£)	Annual (£)	Monthly (£)	Annual (£)
130.35	1,564	169.46	2,034

- **Enhanced:** Children require ongoing strategies, intervention and additional SEN support specifically targeted at their needs. The level of resourcing required may exceed what the school or college can provide from its budget and is at a higher level than that required for provision at the targeted support level.

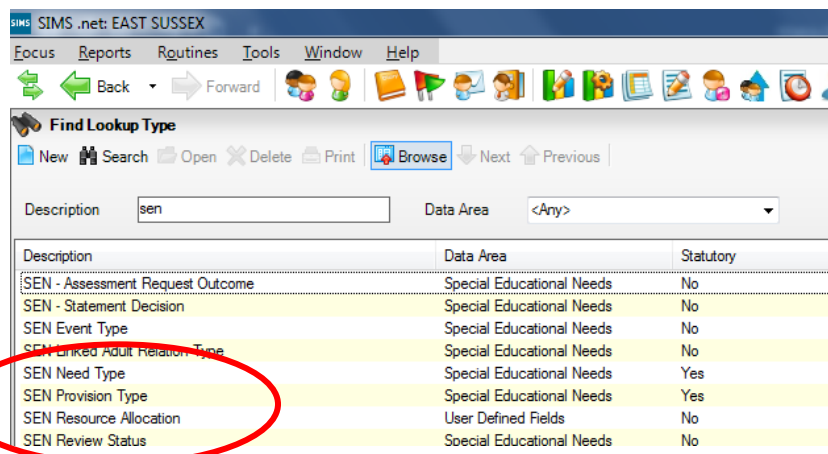
Enhanced A		Enhanced B	
Monthly (£)	Annual (£)	Monthly (£)	Annual (£)
273.74	3,285	430.16	5,162

Checking if you have SEN Matrix Bands set up in SIMS

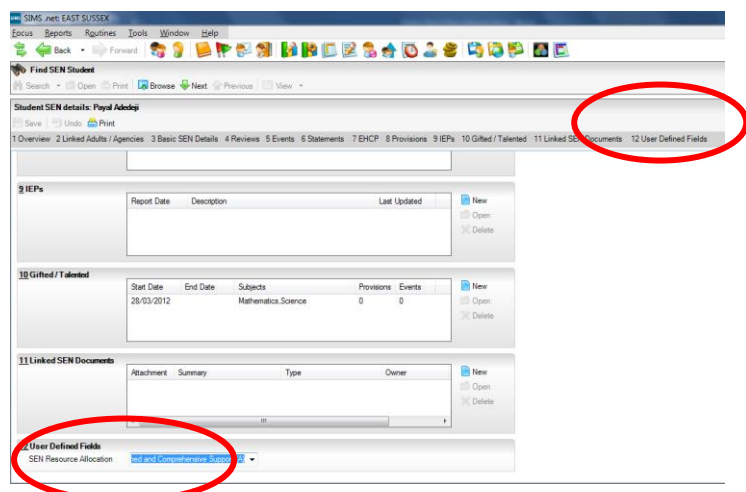
Please follow these instructions to check if your school already has SEN Matrix Bands set up in SIMS.

From within SIMS select **Tools | Lookups | Maintain**.

Type **SEN** in the **Description** and click **Search** to ascertain whether you have **SEN Resource Allocation** set up.



If this has been set up it will appear in the drop down area of the student's SEN record in panel 12- **User Defined Fields**.

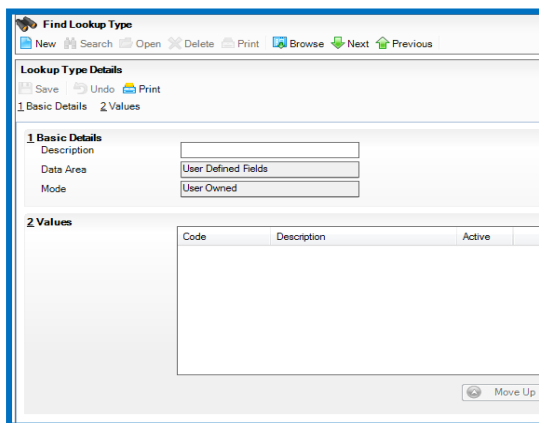
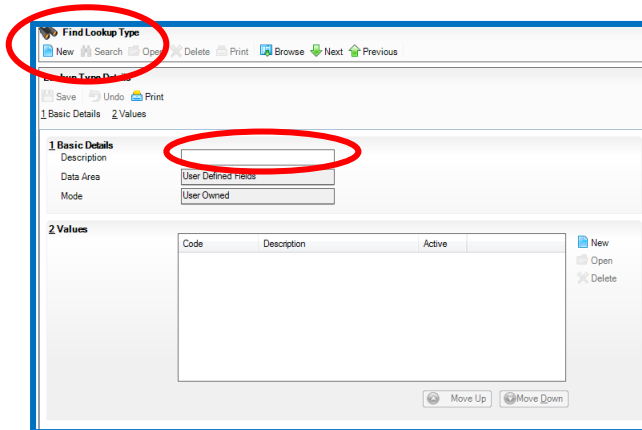


If you have the field set-up then please go to page 9 of the documentation.

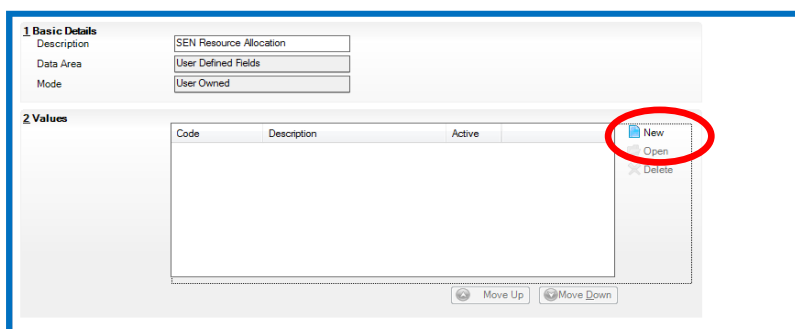
If you do not have the field set up and wish to record the information in SIMS then please follow pages 5-8 and page 14.

Setting up the SEN Matrix Bands Look up Table in SIMS

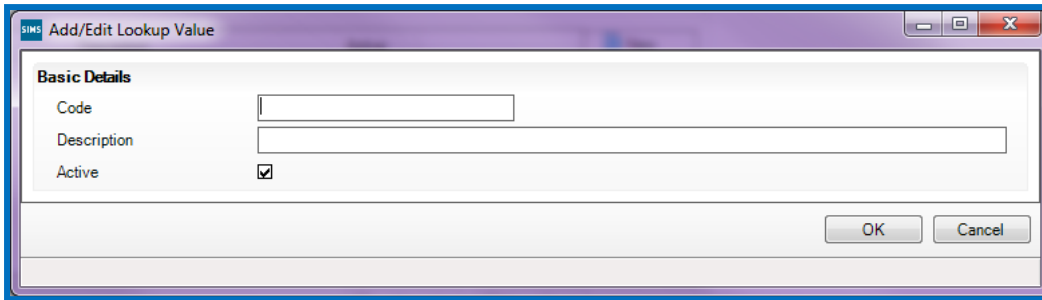
Select Tools | Lookups | Maintain and New.



A new lookup screen will appear. In the description type **SEN Resource Allocation**. The Data Area field and Mode will populate automatically.

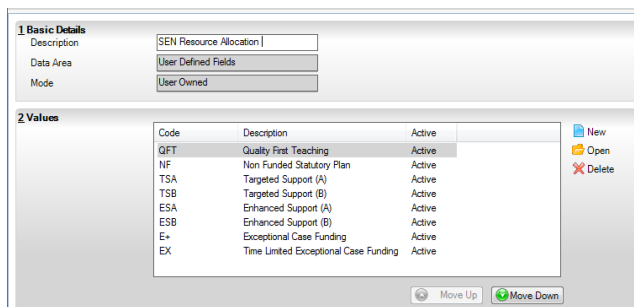


Single left- click on the blue **New** icon to the right of the Values area. An Add/Edit Lookup Value box will appear.



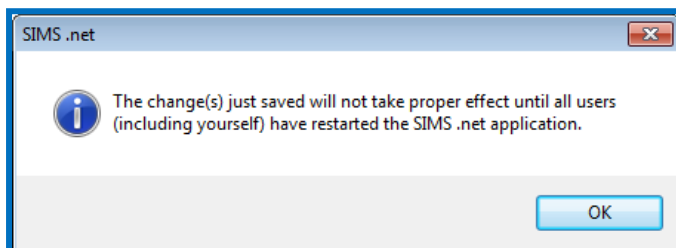
Add the Codes and Descriptions as detailed below ensuring the Active box is ticked and press **OK** when the information is entered. This will return you to the Lookup Type SEN Resource Allocation Screen. Select **New** and repeat for each new category.

- QFT Quality First Teaching
- NF Non Funded Statutory Plan
- TSA Targeted Support (A)
- TSB Targeted Support (B)
- ESA Enhanced Support (A)
- ESB Enhanced Support (B)
- E+ Exceptional Case Funding
- EX Time Limited Exceptional Case Funding



When all the new categories have been added, left click on the blue **Save** button at the top left hand side of the screen.

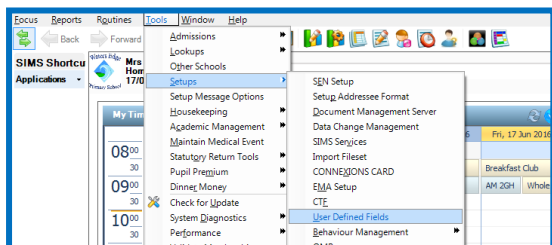
A message will appear on the screen as below:



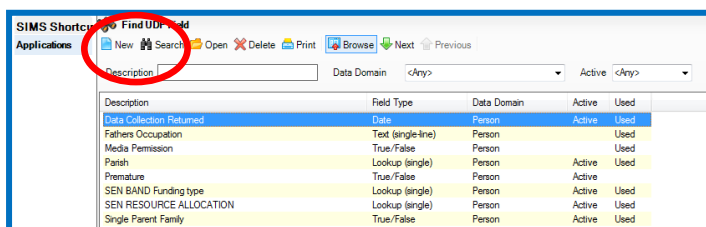
Left click on **OK** and restart SIMS.

Creating the SEN Resource Allocation User Defined Field in SIMS

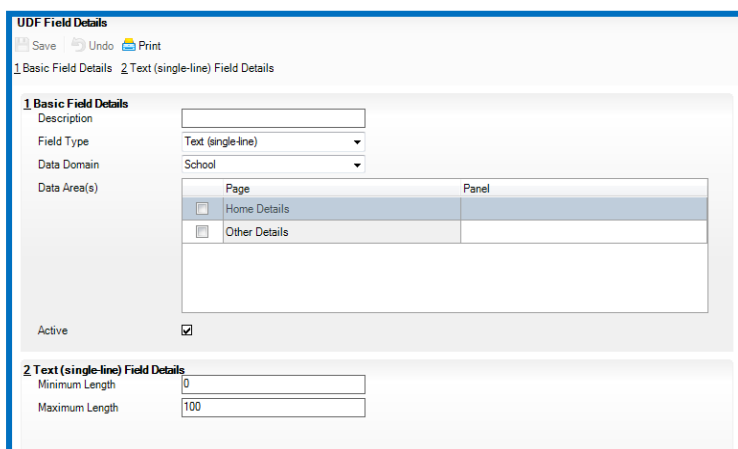
Select Tools | Setups | User Defined Fields



Single left-click on **Search** to populate the browse area and view the User Defined Fields already created.



Select **New**. This action opens the UDF Field Details screen.



Populate the fields to match the example given below (screenshot on following page):

Description : SEN Resource Allocation

Field type: Lookup (single)

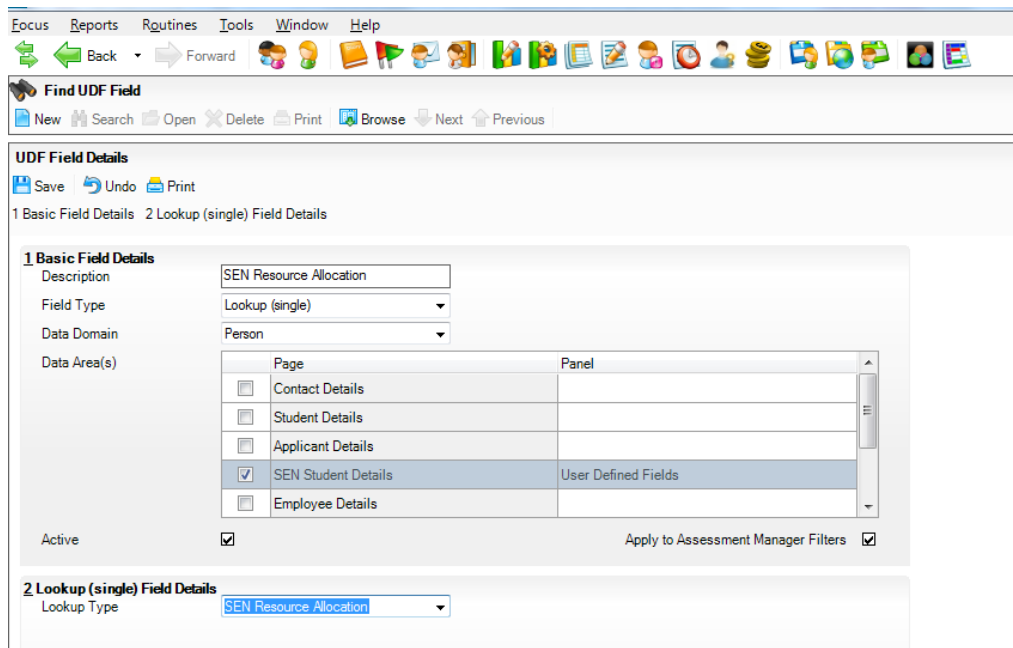
Data Domain: Person

Data Area(s): SEN Student Details User Defined Fields

Active and Assessment Manager Filters both ticked

Lookup (single) Field Details

Lookup Type: SEN Resource Allocation



The screenshot shows the 'Find UDF Field' application window. The title bar includes 'Focus Reports Routines Tools Window Help'. Below the title bar is a toolbar with icons for Back, Forward, and various file operations. The main window is titled 'Find UDF Field' and contains a sub-section 'UDF Field Details' with 'Save', 'Undo', and 'Print' buttons. Below these are tabs for '1 Basic Field Details' and '2 Lookup (single) Field Details'.

1 Basic Field Details

Description: SEN Resource Allocation

Field Type: Lookup (single)

Data Domain: Person

Data Area(s):

Page	Panel
<input type="checkbox"/>	Contact Details
<input type="checkbox"/>	Student Details
<input type="checkbox"/>	Applicant Details
<input checked="" type="checkbox"/>	SEN Student Details User Defined Fields
<input type="checkbox"/>	Employee Details

Active: Apply to Assessment Manager Filters:

2 Lookup (single) Field Details

Lookup Type: SEN Resource Allocation

The Field Type and Data Domain selections can be made from the drop – down menus available. Once selections are made different options then become available.

Placing a tick in the Data Area of **SEN Student Details** ensures the user defined field will be available in that area of SIMS.

In Field 2, Lookup (single) field Details , the newly created **SEN Resource Allocation** lookup will be available for selection only if SIMS was restarted after creating the lookup.

Once created, please click on the blue **Save** icon (top left hand corner of the UDF Field Details screen) .

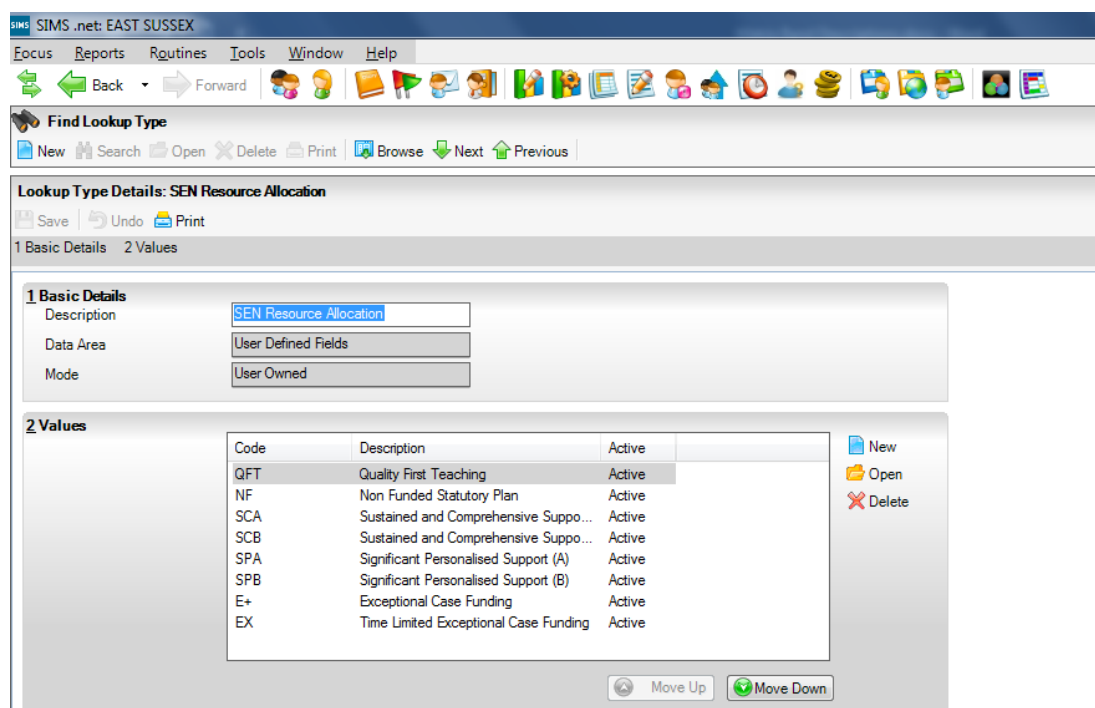
Please go to page 14 to see how to selecting the SEN Resource Allocation for an individual student or how to bulk update the information.

Amending the SEN Matrix Bands Look up Table in SIMS

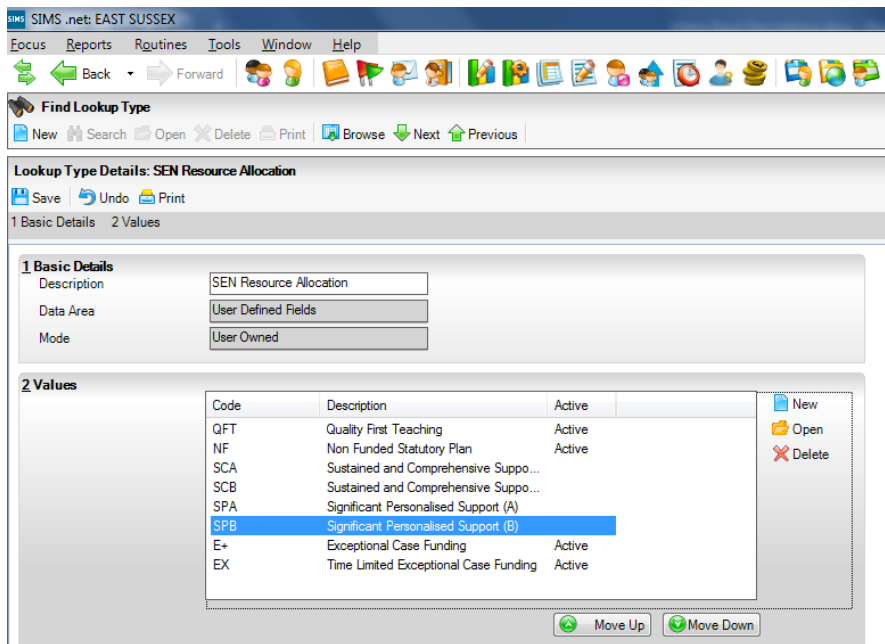
If your school have already created and is using the SEN Resource Allocation User Defined Field, there is a choice of editing the existing lookup table and using the existing User Defined Field; or editing the lookup table and creating a new user defined field and deactivating the old. Editing the lookup table and using the existing SEN Resource Allocation User Defined field is a quicker process, but means you won't be able to report on previous bandings. Therefore if a student had SCA and now has TSA selected the SCA won't show in any reports, irrespective of the date they are run. This is a school choice. Whether you choose to amend the User Defined Field or create a new User Defined Field, you will first need to amend the SEN Matrix Bands Look up Table as follows:

Select **Tools | Lookups | Maintain**

Type **SEN** in the **Description** and open **SEN Resource Allocation** by double left-clicking on **SEN Resource Allocation** or single left-clicking and selecting **Open**.



To deactivate SCA, SCB, SPA double left-click on each one in turn, **deselect Active** and select **OK**.



Add the revised Codes and Descriptions by selecting **New** and then adding a code and description as follows:

TSA Targeted Support (A)

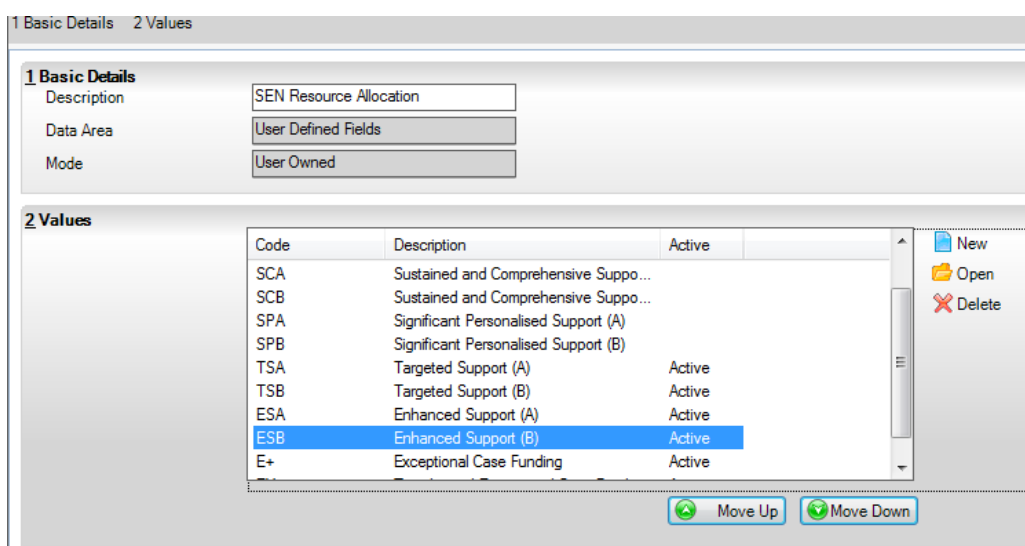
TSB Targeted Support (B)

ESA Enhanced Support (A)

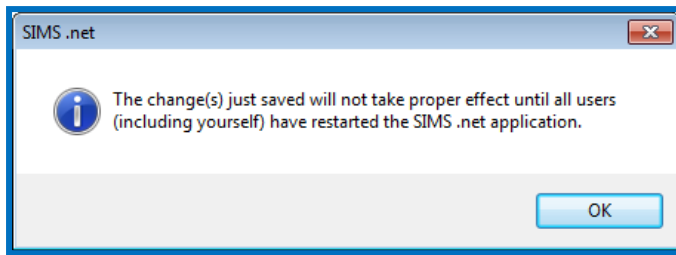
ESB Enhanced Support (B)

Using the Move Up button will move them above E+ and EX

Select **Save**



A message will appear on the screen asking you to restart SIMS.



Left click on **OK** and restart SIMS.

If you have chosen not to create a new User Defined Field the new bandings will be available for you to select.

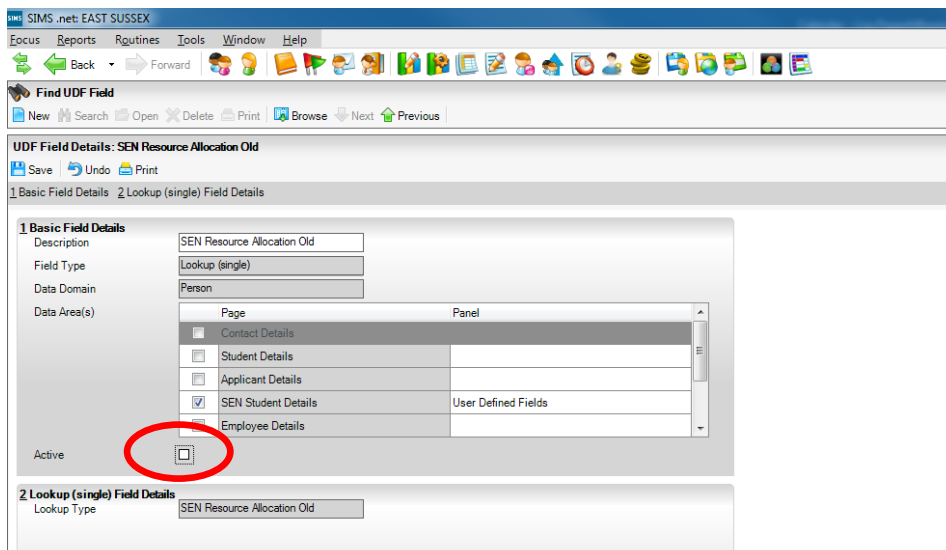
Creating the SEN Resource Allocation User Defined Field in SIMS and Deactivating the Old Field

To rename the existing User Defined Field select **Tools | Setups | User Defined Field**

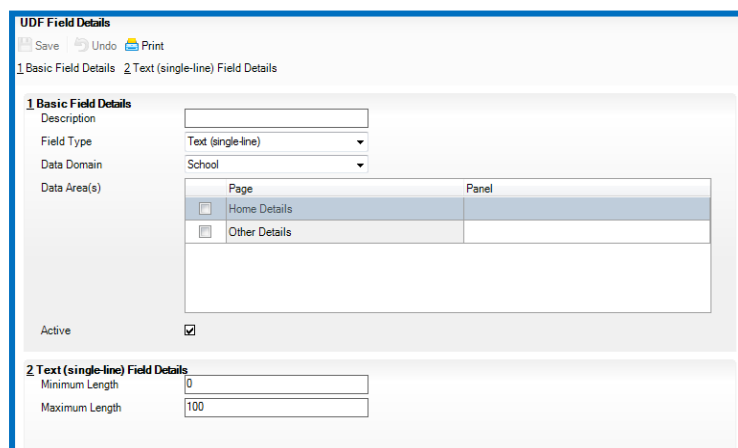
Type **SEN** into the Description and click **Search**

Highlight and open **SEN Resource Allocation** and add **Old** to the end of the name

Remove the tick from the Active box and **Save**. The old field can be reactivated if you wish to see a student's previous allocation.



Now to create the new User Defined Field select **New**. This action opens the UDF Field Details screen.



Populate the fields to match the example given below:

Description : SEN Resource Allocation

Field type: Lookup (single)

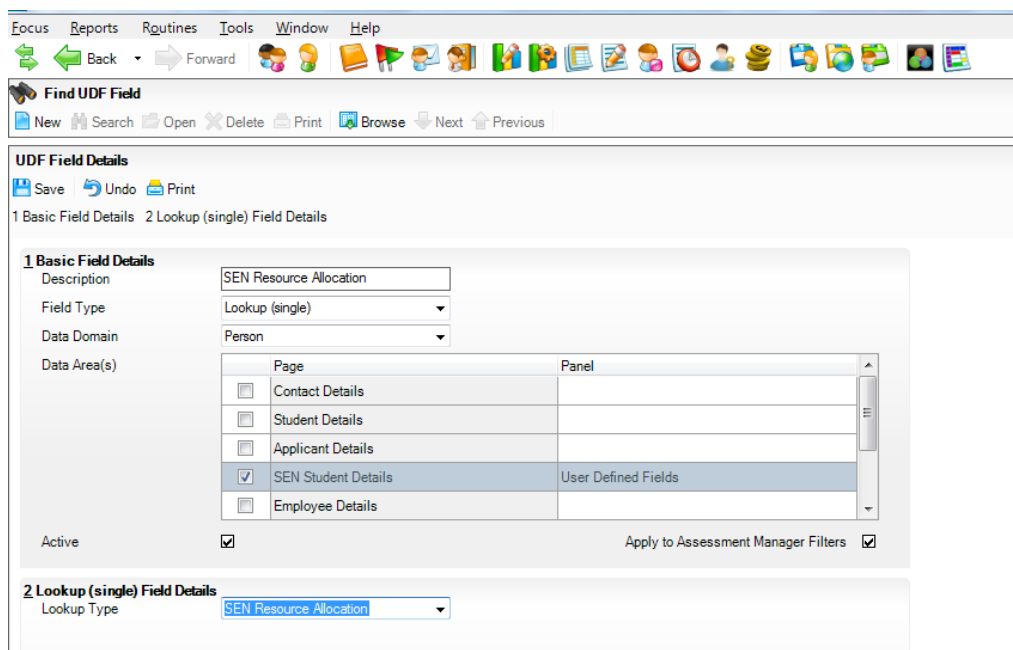
Data Domain: Person

Data Area(s): SEN Student Details User Defined Fields

Active and Assessment Manager Filters both ticked

Lookup (single) Field Details

Lookup Type: SEN Resource Allocation



The screenshot shows the 'Find UDF Field' application window. The main area is titled 'UDF Field Details' and contains two sections:

1 Basic Field Details

- Description: SEN Resource Allocation
- Field Type: Lookup (single)
- Data Domain: Person
- Data Area(s): A table with columns 'Page' and 'Panel'. The row for 'SEN Student Details' is selected, with 'User Defined Fields' in the 'Panel' column.

Page	Panel
<input type="checkbox"/> Contact Details	
<input type="checkbox"/> Student Details	
<input type="checkbox"/> Applicant Details	
<input checked="" type="checkbox"/> SEN Student Details	User Defined Fields
<input type="checkbox"/> Employee Details	

Active: Apply to Assessment Manager Filters:

2 Lookup (single) Field Details

- Lookup Type: SEN Resource Allocation


The Field Type and Data Domain selections can be made from the drop – down menus available. Once selections are made different options then become available.

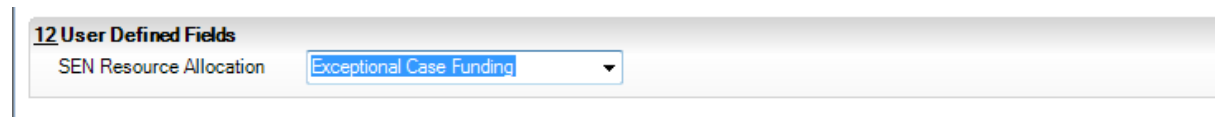
Placing a tick in the Data Area of **SEN Student Details** ensures the user defined field will be available in that area of SIMS.

In Field 2, Lookup (single) field Details , the newly amended **SEN Resource Allocation** lookup will be available for selection.

Once created, please click on the blue **Save** icon (top left hand corner of the UDF Field Details screen) .

Selecting SEN Resource Allocation for an individual student

Open a relevant student's record using the **SEN Student** browse . Scroll to the bottom of the student record or use the hyperlink panel number **12 User Defined Fields** at the top of the student record and **select from the SEN Resource Allocation** drop down and **Save**.

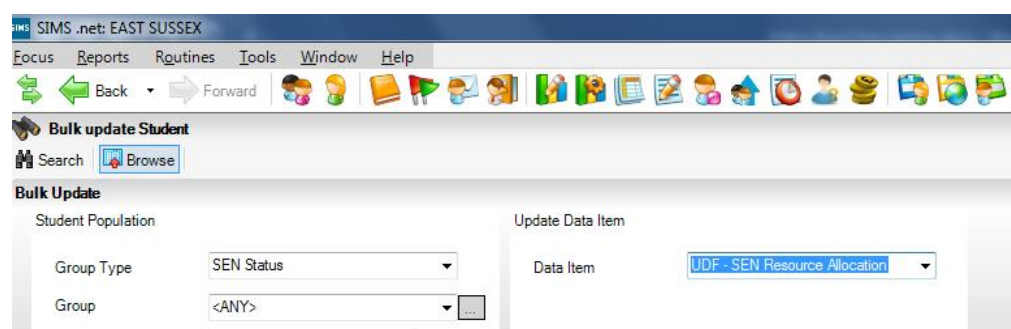


12 User Defined Fields
 SEN Resource Allocation: Exceptional Case Funding

Selecting SEN Resource Allocation using Bulk Update

Select **Routines | Pupil | Bulk Update**

Select as shown below



Bulk update Student
 Search Browse

Bulk Update

Student Population

Group Type: SEN Status

Group: <ANY>

Update Data Item

Data Item: UDF - SEN Resource Allocation

Group type: SEN Status

Group: <ANY>

Data Item: UDF – SEN Resource Allocation

Leave the date set as today

Select **Search**

All the SEN students will appear

Left-click on the Year group heading to **order by year group**

Select the applicable **Resource Allocation**

Save