Managing Courses

Applicable to 7.188 onwards
Revision History

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Providing Feedback on Documentation

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publications@capita.co.uk

Please ensure that you include the module name, version and aspect of documentation on which you are commenting.
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Introduction

This handbook details the best practices to adopt to enable you to record, analyse and report accurately for the Autumn Census Return at Post 16 level and for the Post-16 PLASC Return for schools in Wales.

School users of SIMS are familiar with courses through the use of Assessment, Profiles, Analysis and Examinations Organiser. In these applications, access to classes is provided through the courses which they serve.

In addition, the course is used, where appropriate, as the most natural point of attachment for such entities as a comment bank in Profiles, or an award in Examinations Organiser. Please refer to the Processing Results and Calculating PI Data in Examinations Organiser handbook for further information about Adding PI Results to Multiple Pupil/Students in SIMS.

What is a Course?

A course can most appropriately be defined as a qualification or Learning Aim. At its simplest, it constitutes what the Curriculum Matching Wizard recognises as a distinctive subject/level combination, exported by Nova-T as class properties.

A course can also function as a group of students pursuing a particular Learning Aim (Learning Activity for schools in Wales). The properties to be maintained include those generic to any group, such as supervision and membership, and those specific to a course, such as links with classes, exam awards, subjects, etc.
A course has defining attributes, which are **Subject** and **Level**, and descriptive attributes, which are generally properties defined by an external authority for purposes of reporting and analysis in Census Returns. The terminology used in Course Manager for this set of properties is Classification Code and Classification Codeset.

Schools are familiar with the conventions used to generate codes, short names and descriptions for the courses which have been inferred from class definitions in Nova-T. For example, if a Geography class is exported from Nova-T with a level of **GCSE**, it is inferred that the school is preparing students to achieve a Learning Aim coded as **Gg/GCSE** and entitled **Geography (GCSE)**. The same conventions are used by Course Manager to generate the short names and descriptions required when a new course is created.

### Why is Course Manager Needed?

Course membership is usually correctly reflected by a single class membership. However, certain types of anomaly can occur in every school. These potential anomalies are catered for in Course Manager:

- A single class preparing all or some of its members for more than one Learning Aim, most commonly GCSE English classes delivering both Language and Literature as separate examinations.
- A single class preparing its members for one or another of multiple Learning Aims, for example a class for an Applied GCE subject that contains candidates for Single or Dual certification.
- A course for which no formal, timetabled classes are provided, such as twilight courses.
- A course taught across the curriculum, e.g. Key Skills Communication.
- A student pursuing a Learning Aim without formal teaching, e.g. a native speaker of a foreign language, who may require a certain amount of exam preparation, but not a full course of instruction.
- A student in a class for some other reason than an intention to achieve a Learning Aim associated with it.

### Important Information Regarding the Collection of Post 16 Learning Aims

English schools with a Sixth Form are required to provide the details of Learning Aims/QNs in the School Census:

- Learning Aims are collected once a year in the Autumn Census.
- Learning Aims are collected for students taught in Year 12 and above during the Learning Aim collection period.
- Schools must ensure that the Learning Aims submitted in the census are those that they wish to claim funding for.
- Local Authorities and Academy schools should refer to the Department for Education website for pertinent information.

Schools in Wales are required to provide the details of Learning Activities/QWADs in the Post-16 PLASC return.
What Data is Collected?

Learning Aims information (England) is collected for students within the following parameters:

**In the Current Academic Year:**
- any student, regardless of age, who has been on-roll between the 1st August 20in and the date of the census day who has participated in a Learning Aim whilst in National Curriculum Year 12 or above.

**For the Previous Academic Year:**
- any student, regardless of age, who has been on-roll between the 1st August 20in and 31st July 20in who has participated in a Learning Aim whilst in National Curriculum Year 12 or above.

**Dual Registered Students**
- Funding is only provided to the student's main school and the Learning Aims details for dual registered students must be returned by the main school. Subsidiary schools must not submit Learning Aims details for dual registered students who are not on-roll at their school.

The following information is collected in the census file:
- QAN (Qualification Accreditation Number) now known as QN Qualification Number
- Start Date of the Learning Aim
- Planned End Date of the Learning Aim
- Actual End Date of the Learning Aim
- Current Status of the Learning Aim, Completed, Continuing, Withdrawn, Transferred
- Core Aims (England only)
- Details of Traineeships and UKPRN (England only)
- Programme of Study hours.

Understanding QANs (QNs) in England

Qualification Accreditation Numbers (QANs, known as QNs in Exams in SIMS) are numbers that are applied to each individual Exam Award. These are used to universally identify the exam **Board** provider; the **Level** being studied and the **Subject** of an exam.

There are two different sources of QANs that can be used simultaneously throughout Course Manager, depending on the circumstance:
- QWS QANs are downloaded from the DfE QAN Web Site ([https://collectdata.education.gov.uk/qwsweb/default.aspx](https://collectdata.education.gov.uk/qwsweb/default.aspx)). These are applicable to all Learning Aims without a result or an entry in the basedata supplied by the exam Awarding Organisation Body (AOB) including new courses and completed school assessed Learning Aims.
- AO QANs are provided by the exam Awarding Organisation Body. These are an integral component of examinations basedata. You must ensure that you are using the most up-to-date basedata in line with the exams season.
To ensure that you are using the most current QANs available for each course of study, it is recommended that you download and import the QAN catalogues provided by the DfE (via Tools | Examinations | Import Qualification Data). This is an important activity to undertake before you start to create the School Census.

More Information:
Importing Qualification Data on page 14
Updating QANs and Discount Codes for Course Manager on page 18
Maintaining Courses in England on page 25

Understanding QWADs in Wales

Secondary schools in Wales must import a copy of the applicable Performance Measures file for use in PI. This file contains information derived from the Qualifications in Wales (QiW) website (https://www.qiw.wales). QiW contains details of all qualifications that are approved or designated for teaching in Wales for learners aged under 19, excluding higher education.

Any qualifications that are approved or designated by Qualifications Wales are eligible for funding by a Local Authority or by Welsh Government. This funding is for the education provider, not the learner.

Information held in QiW includes:
- qualification titles
- qualification numbers
- the Awarding Body that awards each qualification
- qualification start and end dates
- links to further qualification information.

Welsh Government information including:
- whether it counts as a choice for 14-19 Learning Pathways
- performance measures information.

QiW enables schools to:
- search for and view qualification records
- save your school searches
- compare qualification information
- export qualification data
- save qualification data
- print off qualification data.

All qualifications in QiW are allocated a unique identification code known as a Qualifications Wales Approval/Designation Number (QWAD). Schools must use this number when making curriculum choices.
NOTES: Qualifications that are available only in Wales will have only a QW Approval/Designation number. The Welsh Government sets policy on school performance measures and decides on the allocation of contribution values of qualifications, performance points and the discount codes applied to individual qualifications. The QiW hosts this information. If you have any queries on how qualifications contribute towards performance measures, including GCSE/A level equivalency values, performance points or discount codes, please send an email to the Information Management Strategy at the Welsh Government on ims@gov.wales.

Thousands of QWADs have been provided in SIMS. Individual QWADs must be associated manually with a suitable course to ensure that they are correctly identified in the Post-16 PLASC return.

More Information:
Maintaining Course Classification Codes on page 21
Maintaining Courses in Wales on page 26
Updating QWADs in Welsh Schools on page 17

Impacts on Other Areas of SIMS

All existing links between Exam Awards and Courses are preserved when upgrading to the most recent version of Course Manager. These links are allocated blank Start and End dates in the Examination panel of the Maintain Course page.

The Course panel in the Award Details dialog available from Tools | School Setup | Exam Award in Examinations Organiser, is now read-only.
The name of the **Course** that the **Award** is linked to is displayed together with a **Start** and **End** date denoting the history of their association.

**IMPORTANT NOTE:** The linking of Exam Awards with courses is now undertaken through Course Manager. This may result in minor changes to job roles, the allocation of tasks and user permissions within the school.

**More Information:**
*Splitting AQA Basedata to Separate Certification Elements into Individual Awards* on page 87

### What's New in this Release?

#### Changes to the Welsh Baccalaureate Panel

Applicable to schools in Wales only

**Tools | Examinations | Import Qualification Data**

The **Welsh Baccalaureate** panel is now read-only. It is no longer possible to record points and threshold values for QANs.

**More Information:**
*Importing Qualification Data* on page 14

#### Revised List of QWADs Provided by the Welsh Government

Applicable to schools in Wales only

The list of QWADs provided by the Welsh Government has been updated for Summer 2019. QWADs are reported on in the Post 16 PLASC 2019 Return and have replaced the Learning Activity Reference.

**More Information:**
*Updating QWADs in Welsh Schools* on page 17

### Setting Permissions

When running Course Manager in SIMS, you should use the **Login Name** and **Password** assigned to you by the System Manager. This will have been set up using the System Manager module.

The default data available with the current version of the System Manager module provides a number of groups to which a user can be assigned membership. Each group offers a different range of Course Manager functionality, so it is possible to specify the individual level of access for each user.

To enable users to add, edit and delete course details, they should be assigned membership of the Curriculum Manager group. Other groups which provide the ability to view course details *only* are Class Teacher, Pastoral Manager, Registration Tutor, Assessment Co-ordinator, Exams Officer, Returns Manager, Assessment Operator and Exams Operator.

SIMS System Manager should be run to create user accounts for those people who require access to Course Manager. To grant a user access to Course Manager, they should be allocated membership of appropriate groups.
The groups that have been provided as default data are designed to be used as a starting point for schools, to enable them to grant their users access to Course Manager quickly and conveniently. If you decide that the groups provided as default data are inappropriate for your school, you can create your own groups and assign the appropriate Permissions accordingly.

**Where to Find More Information**

Online help can be accessed by pressing F1 or clicking the applicable Help button in SIMS.

A wide range of documentation is available from the SIMS Documentation Centre, including handbooks, quick reference sheets and tutorials. Click the Documentation button (located on the top right-hand side of the SIMS Home Page), select the required category and then select the document you require. Alternatively, use the Search facility to locate the required document.

Documentation is also available from the My Account website (https://myaccount.capita-cs.co.uk).

1. Enter the required text in the Search field to display a list of documents that match the search criteria.

2. To refine the search further, click Documents and then select the required Document type, File type and/or Date range (click Show more to view additional options, if required).

Alternatively, click SIMS Publications (located in the Popular Searches list) to display a list of all SIMS publications.

The search results are displayed automatically.

**Tips for using the My Account Search Facility**

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

*NOTE: You no longer need to use + / - / "" when searching.*

- Cut down on the amount of words that you type in the search field and only use key words, e.g. instead of typing pupil/student showing as a contact search for the word contact.
- Use the Product Type filter to refine results further.
- Use the advanced filters located on the left-hand side of the Search results page.
01 | Getting Started with Course Manager
02| Setting up Course Manager

**Introduction**

Due to the direct impact on the school's funding in relation to courses, a number of key members of staff must liaise closely with one another to ensure that clear and concise processes are followed when administering Course Manager.

**More Information:**

Viewing Assessment Marksheets as a Course Supervisor on page 13

**Modifying Course Manager Settings**

This page enables you to specify the default settings that will be used throughout Course Manager. These settings are applied to all courses unless you manually modify the parameters of a specific course from the Course Details page.
1. Select **Tools | Academic Management | Course Manager | Course Manager Settings** to display the **Update Course Manager Settings** page.

2. If you want the **Course Supervisor** to be made a supervisor of all classes that are linked to a course, select the **Auto update Class Supervisors from chosen Course Supervisors** check box. The selection made here is reflected in the **Supervisors** panel on the **Course Details** page.

3. Click the drop-down arrow to select the **Default for Course Browse**. The selection you make here is reflected in the **Find Course** browser. The default is **Census View** (schools in Wales will see **Current Academic Year**), but this can be changed, whenever necessary. The options are: **Current Year to Date, Previous Academic Year, Custom** and **View All Courses**. The **From** and **To** dates are updated automatically in conjunction with the selection that you have made. If you have selected **Custom**, the date range can be specified when searching for a course in the **Find Course** browser. The courses displayed in the **Find Course** browser reflect the dates selected here, i.e. only courses that have student memberships during the selected date range are displayed.
**IMPORTANT NOTE:** If you want the **Core Aim** column to be visible when reviewing a pupil/student's course membership in the **Memberships and Results** panel of the **Course Details** page, you must ensure that you select either the **Current Academic Year** or the **Previous Academic Year** in the **Default for Course Browse**.

The **Minimum** and **Maximum Course Duration** fields enable you to define the predicted length of time needed to deliver the course material to the pupil/students. The **Minimum Course Duration** defaults to **One Year**, the **Maximum Course Duration** defaults to **Two Years**. Both of these options can be changed to ensure that the expected course duration does not exceed the length of time specified here. The possible lengths of time that you can select for either of these duration settings are: **Less than 2 weeks**, **2-24 Weeks**, **One Year**, **Two Years**, **Three Years**, **Four Years** or **Five Years**.

The **Discount Results** check box is selected by default. This ensures that the Exam results calculation includes Discounting.

Enter an appropriate figure, in hours, in the **Planned Hours Threshold** field.

The **Discount Results** check box is selected by default. This ensures that the Exam results calculation includes Discounting.

Enter an appropriate figure, in hours, in the **Planned Hours Threshold** field.

The **Default Course Duration** cannot be outside the range defined by the **Minimum** and **Maximum Duration** fields. This is set to **One Year**, by default. Specifying the **Course Duration** makes it easier for you to decide whether to restart a course after the Summer holidays as a continuation of the same Learning Aim or to regard the course as a retake with a new Learning Aim associated with it.

The **Discount Results** check box is selected by default. This ensures that the Exam results calculation includes Discounting.

Enter an appropriate figure, in hours, in the **Planned Hours Threshold** field.

The **Discount Results** check box is selected by default. This ensures that the Exam results calculation includes Discounting.

Enter an appropriate figure, in hours, in the **Planned Hours Threshold** field.

The **Default Continuity Tolerance** field defaults to **Two Weeks**. This represents the acceptable length of a 'gap' in course membership, including holidays, which is tolerated before course memberships are deemed to have been discontinued. The possible lengths of time that you can select for either of these tolerance settings are: **None**, **One Day**, **Two Days**, **Three Days**, **Four Days**, **One Week**, **Two Weeks**, **Three Weeks**, **One Month**, **Two Months** or **Three Months**.

The **Default Completion Tolerance** field defaults to **Two Months**. The length of time specified here indicates the period of time prior to the expected course completion date that a pupil/student can leave a course and still be deemed to have completed the course. A default **Status** is assigned when a pupil/student leaves a course via **Curriculum Assignment by Scheme** or via the **Leavers** routine.
The **Earliest YTI for Completion Management** field defaults to Year 11. This indicates that students taught in Year 11 and above are subject to management of their course completion. This also controls the appearance of the **Course Membership(s)** dialog when manually modifying a student membership.

**IMPORTANT NOTE:** Courses for students in Year 11 must be ended before the 1st August so that they are not confused with qualifications for Year 12 and above.

The settings specified here are applied to all courses globally. However, you can modify the **Course Duration**, **Continuity Tolerance** and **Completion Tolerance** fields within an individual course through the **Maintain Course** routine, if required.

4. Click the **Browser** button adjacent to the **Folder for Results Report** field to display the **Browse For Folder** dialog. Navigate to a suitable storage location for the Course Manager reports that will be generated.

The **Default Course Duration and Tolerances by Level** grid displays the default settings for all the available Levels. You can modify the settings for individual levels by clicking into the relevant column so that the drop-down arrow becomes visible. Select an alternative setting from the drop-down list. If you change your mind, right-click the column heading of the setting that you have changed and click the hover help to reset the level settings back to the default setting.

5. Enter a figure for the **Default Qualification Hours** and the **Default Non-Qualification Hours** columns, for each Level, where applicable.

**IMPORTANT NOTE:** When changing the **Default Course Duration**, **Default Continuity Tolerance** or the **Default Completion Tolerance**, you must ensure that you right-click the column heading in the **Default Course Duration and Tolerances by Level** panel to collectively change the default setting in the columns. If you click the **Save** button before doing this, the defaults in the **Default Course Duration and Tolerances by Level** panel will not correctly reflect the defaults that you have specified in the **Settings** panel.
When new Levels are added, you are prompted to revisit the default settings to ensure that they are applicable to the new Levels. It is also suggested that you manually set the **Default Course Duration** for GCSEs to **Two Years** in length.

6. If you do not want to save any changes that you have made, click the **Close** button.

7. Alternatively, click the **Save** button to apply your changes.

### Viewing Assessment Marksheets as a Course Supervisor

When assigning a supervisor to a course, you normally select the **Supervisor Title** that best suits that person’s role within the school, e.g. the **Curricular Manager** (although the role of Curricular Manager could have different responsibilities in different schools).

Course Manager provides a pre-defined set of supervisor titles; ensure that you select the appropriate title for each supervisor. If you are a supervisor of the group, you can see all related marksheets. If you are a Head of Year, any marksheets that are for a registration group or a class belonging to the associated pastoral year are visible. The links between registration groups and pastoral years are defined when creating the pastoral structure. The links between classes and pastoral years are made when the timetable is submitted from Nova-T.

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<th>Supervisor Title</th>
<th>Marksheet Access Levels</th>
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<tbody>
<tr>
<td>Class Teacher (this is not one of the Course Manager Supervisor Titles)</td>
<td>View own class marksheets only</td>
</tr>
<tr>
<td>Head of Department</td>
<td>View course and class marksheets</td>
</tr>
<tr>
<td>Second in Department</td>
<td>View course and class marksheets</td>
</tr>
<tr>
<td>Course Co-ordinator</td>
<td>View course and class marksheets</td>
</tr>
<tr>
<td>Head of Faculty</td>
<td>View course and class marksheets</td>
</tr>
<tr>
<td>Curricular Manager</td>
<td>View course and class marksheets</td>
</tr>
<tr>
<td>Supervisor</td>
<td>View course and class marksheets</td>
</tr>
</tbody>
</table>
02 | Setting up Course Manager

Importing Qualification Data

Qualification Accreditation Numbers (QANs) are numbers that are applied to each individual exam award. These are used to universally identify the exam board provider, the level being studied and the subject of an exam. To ensure that you are using the most current QANs available for each course of study, it is recommended that you download and then import the QAN catalogues provided by the DfE before starting each School Census return (https://collectdata.education.gov.uk/qwsweb/default.aspx) or Post-16 PLASC Return and before beginning exams results processing.

1. In SIMS, select **Tools | Examinations | Import Qualification Data**. If you have not already downloaded the most recent files, please do so before continuing. The necessary files can be obtained from the Department for Education QAN Web Site https://collectdata.education.gov.uk/qwsweb/(S(tr0gbpqe3f5zbd20aqx0123z))/Main.aspx.

   ![Images](image1.png)

   **Image Description**: Please confirm that your download is up to date.

   ![Images](image2.png)

   **Image Description**: After downloading the latest files, click the OK button to display the Import Qualification Data page.

2. After downloading the latest files, click the OK button to display the Import Qualification Data page.
3. In the **Select Catalogue Files** panel, click the **Browser** button adjacent to the relevant file type field and navigate to the location of each file. Highlight the required file and click the **Open** button. You must ensure that the file selected for each file type is the correct one.

As long as you have selected the correct file name for each file type, when you click the **Import Catalogue Files** button, the files are automatically imported in the correct order. This may take a few minutes. When the files have imported successfully, the **Activity Log** confirms what has been imported.

4. Click the **Close** button.
Applicable to Schools in Wales only

Secondary schools in Wales must import a copy of the applicable Performance Measures file for use in PI. This file contains information derived from the Qualifications in Wales website (https://www.qiw.wales) (QiW). This file contains the details of the recognised Awarding Bodies and their qualifications for England (Ofqual), Northern Ireland and Wales (Estyn), together with the grades, points values, equivalences and thresholds.

1. In the Select Performance Measures File panel, the Last Imported Date is displayed for information.

![Select Performance Measures File](image)

The Last Imported File Name displays the details of the last imported file. This includes the region, year prefix and version.

2. Click the Browser button adjacent to the Select new file to import field and navigate to the location of the file you want to import.

3. Click the Import Performance File button to begin the import of the file. The NI KS4 A-E and L3 A-C Entry Equivalence fields are populated for schools in Northern Ireland after importing the NIEFQAN.xml file.

4. Click the Print button to print a copy of the file names and locations for future reference, if required.

When you next open the page, the Last Imported Date field reflects the date of the most recent file import although you must navigate to the location of the most recently downloaded file before you can import the catalogues again.

The Welsh Baccalaureate Panel from 2019

The Welsh Baccalaureate panel has been modified; it is now read-only and it is no longer possible to enter points and threshold values for QANs.

Reviewing the QAN Import

Once the relevant Performance Measures file has been imported, you can print two reports from the Review QAN import panel.
These reports enable you to check the integrity of the QANs in the basedata:

- Certification Elements without QANs - this report lists the Series Board Entry Code and the Title of all basedata elements without a QAN. You must enter the missing QANs in Examinations Organiser via Focus | Basedata to ensure the accuracy of the PI data in Examinations Organiser.

- Certification Elements with unmatched QANs - this report lists the Series Board Entry Code, Title and QAN of all basedata elements that have a different QAN from the QAN details provided in the relevant file. You must correct the QANs in the basedata to ensure the accuracy of the PI data in Examinations Organiser.

**NOTE:** Both of these reports check the QAN information held for the past four years.

Click the Save button on the Import Qualification Data page.

### Updating QWADs in Welsh Schools

From 2018, Qualification Wales Approval Designation numbers (QWADs) are collected in the Post-16 PLASC Return instead of Learning Activity reference numbers. Thousands of QWAD records can be selected in SIMS. Courses must be assigned QWAD codes to ensure that they are correctly identified in the annual PLASC return.

1. Select Tools | Academic Management | Course Manager | Update QWADs for Course Manager to display the Update QWADs for Course Manager page.

2. Specify the QWAD search criteria by selecting from the Board and Level drop-down lists. You can also enter all or part of the QWAD’s Containing Title or code (QWAD).

3. Click the Search Title button.

4. Highlight the required QWAD and click the Add button to copy the selected item into the lower panel.
Multiple QWADs can be selected by highlighting the first item, holding down the **Shift** and **Ctrl** keys and using the **Up** and **Down** arrows.

5. If you select an item by mistake, highlight it and click the **Remove** button.
6. When you have selected all the required QWADs, click the **Update** button. These items will now be available for use within Course Manager.

**NOTE:** If items are already available for selection within Course Manager, they will not be visible when searching the QWAD catalogue.

### Updating QANs and Discount Codes for Course Manager

The QWS QAN catalogue contains thousands of records that can be selected. Once the up-to-date QWS QAN catalogues have been imported into Course Manager, you must activate specific QANs and QAN Discount Codes so that they become available for selection.

1. Select **Tools | Academic Management | Course Manager | Update QANs and Discount Codes for Course Manager** to display the **Update QANs and Discount Codes for Course Manager** page.

2. Specify the QAN search criteria by selecting from the **Board** and **Level** drop-down lists. You can also enter all or part of the QAN’s **Containing Title** or code (**QAN**).
3. Click the **Search Title** button.

4. Highlight the required QAN and click the **Add** button to copy the selected item into the lower panel.

   Multiple QANs can be selected by highlighting the first item, holding down the **Shift** and **Ctrl** keys and using the **Up** and **Down** arrows.

5. If you select an item by mistake, highlight it and click the **Remove** button.

6. When you have selected all the required QANs, click the **Update** button.

   These items will now be available for use within Course Manager.

   **NOTE:** If items are already available for selection within Course Manager, they will not be visible when searching the QAN and Discount Codes catalogue.
Running the Duplicate QAN Report

You can create **Student Level** reports or a **QAN Level** report, enabling you to view and print information for pupil/students who have a learning aim with a status of transferred, withdrawn, completed or continuing.

1. Select **Tools | Academic Management | Course Manager | Duplicate QAN Report** to display the **Duplicate QAN Report** dialog.

2. Specify the date period for the report from the **Select Academic Year** drop-down list. The options are **Current Academic Year**, **Current Course Memberships**, **Previous Academic Year** and **Custom**.

3. Click the required button for the report to be created, based **By QAN** or **By Student**.

4. Click the **Report** button to generate the **View QAN Level Report**.
The reports are created in .html format.

5. Click the **Close** button.
Introduction

A number of new concepts have been introduced to improve the maintenance and management of courses. These include the ability to specify the Duration and Tolerance parameters for each individual course.

Maintaining Course Classification Codes

Classification codesets are provided as part of an installation or upgrade of SIMS. Codesets can be made Active or Inactive, according to the selection of certifications provided by your school, but they cannot be deleted or amended in any other way.

Before adding or editing course details, you should ensure that classifications are set up according to your school’s needs, so that only codesets appropriate to the courses offered by your school are made available for selection.

Schools in Wales should ensure that only Learning Activities that take place in their school are marked as Active. Spending time on setting up your codesets correctly can reduce the amount of time spent allocating Learning Activities to courses.

After upgrading to the most recent version of Course Manager, all existing classifications are preserved and are allocated blank Start and End dates in the Classification panel of the Maintain Course page.
1. Select **Tools | Academic Management | Course Manager | Maintain Course Classification** to display the **Classification Codes** dialog.

![Classification Codes dialog](image)

2. Select a **Classification Codeset** from the drop-down list. The available codesets vary depending on the location of your school. In England, the following codesets are available:
   - Level
   - QAN
   - DAS Generic QAN
   - PPoS (these must be entered manually)
   - Provider UKPRN (England only). Where the provider of a course for Post 16 students is other than the school, the provider's UK Provider Registration Number can be selected. This information can be entered in the **Establishment** panel via **Focus | School | School Details**.

3. After selecting QAN, it is possible to click the **Remove Unused QANs** button to delete extraneous QANs. Only QANs that are not linked to courses or used in Exams can be deleted.
An **Activity Log** displays details for the outcome of this housekeeping process.

The DAS system is only interested in the Generic QAN in terms of Diplomas, this is the only field available on the **Student Diploma Maintenance Form** in Examinations Organiser. However, the QAN is the one used in Course Manager against the course. To reconcile the two codes, you can select the Generic QAN alongside the QAN. This is an optional selection.

If you select **Provider UKPRN** (United Kingdom Provider Reference Number) from the **Classification Codeset** drop-down list, the **New** button is activated.

a. Click the **New** button to display the **Add Classification Code** dialog.

b. Enter the eight digit **Code** for the new course classification code. For further assistance, please visit The UK Register of Learning Providers website ([https://www.ukrlp.co.uk/](https://www.ukrlp.co.uk/)). This is a list of partner organisations that may be providing a number of courses.

c. Enter the matching **Description** for the **Provider UKPRN** specified.

d. Click the **OK** button and then the **Save** button.
For schools in Wales, the following code sets are available:

- QCA
- WG Learning Medium
- QWAD
- WG Disability Status
- WG Learning Provider
- WG Learning Activity
- DAS Generic QAN.

4. Refine the list of codes to display only Active or Inactive codes by selecting the required option from the View drop-down list. The resulting list updates automatically according to the option selected.

5. Enter the code or a fragment of the code, if known, into the Code field.

6. The display of codes can be refined further by entering search text in the Description field. This refines the list to display only codes whose Description contains the character(s) entered.

7. Click the Go button to display the codes for the selected Classification Codeset.

8. Select the code whose Active State you want to edit.

9. In the Codes panel, click in the Active State column for the applicable code.

10. From the View drop-down list, select a different value, if required. The options are Active or Inactive.

11. Repeat Steps 5-8 for each code whose Active State you want to edit.
12. Click the OK button.

13. To complete the process, click the Yes button when asked if you want to save any changes made.

Maintaining Courses in England

1. Select Tools | Academic Management | Course Manager | Maintain Course to display the Find Course browser.

2. Search for the required course details by completing some or all of the following search fields:
   - enter the course Description, e.g. Art (GCEA). Results are displayed for all course descriptions that contain the search criteria entered.
   - enter the Short Name for the course, e.g. Ar/GCEA.
   - select the relevant Subject from the drop-down list, e.g. Art. Alternatively, leave the default set to <Any> to view existing courses for all subjects.
   - enter the QAN/Discount Code combination, if known.
   - select the course Level(s) from the drop-down list, e.g. GCE Advanced, etc. by selecting the required check boxes. Only those levels in use in your school are available for selection.
   - select the required View Memberships option from the drop-down list, the default is Census View but this can be changed to Current Academic Year, Current Year to Date, Previous Academic Year, or Custom.
   - click the respective Calendar buttons in the From and To date fields to change the valid date range for the course that you are searching for. The default date range corresponds to the Census View selected from the View Memberships drop-down list.
   - select an alternative course Status from the default of <Any> by selecting from the drop-down list.

3. When you have specified the required search criteria, click the Search button.

All courses with student memberships within the date range selected, are displayed.
4. Highlight the course you want to view or edit and click the Open button to display the Course Details page.
5. If you want to restore the default settings in the Find Course browser and remove the previously selected Levels before undertaking another search for a different course, click the Reset Filters button at the top of the browser and specify your search criteria again.

Maintaining Courses in Wales
1. Select Tools | Academic Management | Course Manager | Maintain Course to display the Find Course browser.

2. Search for the required course details by completing some or all of the following search fields:
   - enter the course Description, e.g. Art (GCEA). Results are displayed for all course descriptions that contain the search criteria entered.
   - enter the Short Name for the course, e.g. Ar/GCEA.
   - select the relevant Subject from the drop-down list, e.g. Art. Alternatively, leave the default set to <Any> to view existing courses for all subjects.
   - enter the QAN/Discount Code combination, if known.
   - enter the current LA (Learning Activity) code, if known.
   - enter the current QWAD (Qualification Wales Accreditation Designation) code, if known.
   - select the course Level(s) from the drop-down list, e.g. GCE Advanced, etc. by selecting the required check boxes. Only those levels in use in your school are available for selection.
   - select the required View Memberships option from the drop-down list, the default is Census View but this can be changed to Current Academic Year, Current Year to Date, Previous Academic Year, or Custom.
   - click the respective Calendar buttons in the From and To date fields to change the valid date range for the course that you are searching for. The default date range corresponds to the Census View selected from the View Memberships drop-down list.
   - select an alternative course Status from the default of <Any> by selecting from the drop-down list.
3. When you have specified the required search criteria, click the Search button.
   All courses with student memberships within the date range selected, are displayed.
4. Highlight the course you want to view or edit and click the Open button to display the Course Details page.

5. If you want to restore the default settings in the Find Course browser and remove the previously selected Levels before undertaking another search for a different course, click the Reset Filters button at the top of the browser and specify your search criteria again.

**Course Details - Duration and Tolerance Panel**

The values in the Duration and Tolerance panel are inherited from the settings specified in the Update Course Manager Settings page. You can change these values for an individual course by clicking the respective drop-down list and selecting an alternative value. Any changes made are specific to the course that you are currently viewing.

The From and To dates are inherited from the Find Course browser. A blank From date indicates any date on or before the To date. A blank To date indicates any date on or after the From date. If both From and To dates are blank, there is no filtering on the date fields. Select the respective Calendar button to change the dates.

![Duration and Tolerance panel](image)

The Normal Duration value is used to determine whether a new class membership should be added to an existing course membership, for the purposes of retakes.

Two year courses must be set up correctly to ensure that after the completion of year one, the status for students is displayed as continuing to indicate that a result is not expected until after year two of the course is completed.

The Continuity Tolerance value is used to decide whether a single student's memberships should be joined together to form a continuous course membership.

The Completion Tolerance value enables you to determine whether a pupil/student leaving their course before the Planned End Date is deemed to have a course completion status of Completed. This is reflected in the Memberships and Results panel of the Course Details page. The introduction of Completion Tolerance means that you no longer have to make decisions regarding course completion based on whether or not the course End Date was entered in advance.

If you have changed any of the values, click the Save button before continuing.

**More Information:**

Course Details - Memberships and Results Panel on page 37
Course Details - Basic Panel

The fields in the Basic panel are only active when you are creating a new course. At any other time, you can view the basic details about the course, including its name, description and its associated subject.

1. Select the Subject with which the course is associated from the drop-down list.

2. Select the Level of the course from the drop-down list.

   The Short Name and Description for the course is populated automatically from the combination of information selected. The Short Name is read-only although the Description can be modified, if required. When saving a new course that contains a subject and level combination already in use in another course, the new course short name is displayed and appended with a number in the Course Details label, enabling differentiation between courses.

3. Select the required value from the Active Status drop-down list. This is the status currently assigned to the course. The options are Active, Inactive and Obsolete.

   **IMPORTANT NOTE:** Courses that contain no members in a four-week period (i.e. from two weeks prior to today’s date to two weeks after today’s date) are marked as Inactive. Please be aware of this rule if you mark a course as Active with a view to populating its membership for the next Academic Year, as the course may be made Inactive in the meantime.

The Current QWS QAN/Disc code field is populated with the relevant code.
Schools in Wales have different fields displayed in the **Basic Details** panel.

The **Current LA Code** (Learning Activity) is populated with the relevant code (schools in Wales only).

The **Current QWAD Code** (Qualification Wales Accreditation Designation) is populated with the relevant code (schools in Wales only).

4. Select the **Auto Update Class Links** check box, if required.

Selecting this check box ensures that the automated creation of course-class links by the Curriculum Matching wizard in Nova-T6 continues for this course. However, any course-class links submitted by the Curriculum Matching wizard will not overwrite any links declared manually in Course Manager.

Deselecting this check box means that course-class links can be maintained only through Course Manager.

5. Select the **Auto Update Membership** check box, if required.

> NOTE: If a student's class membership is amended in Academic Management, their course memberships are updated automatically without the need to manually run the **Update Course Memberships** routine. This will not be possible if you have deselected the **Auto Update Membership** check box. Deselecting this check box means that course memberships can only be maintained through Course Manager.

6. Enter the total number of **Tuition Hours** for the course, if known. If entered, this figure must not exceed the figure entered for **Study Hours**.

7. Enter the total number of **Study Hours** for the course, if known.

8. Enter the number of minutes per timetable class in the **Minutes per Cycle** field.

9. In the **Planned Hours per Year** section, enter a figure for each of the **Qualification** and **Non-Qualification** hours. For funding purposes, the minimum threshold for a pupil/student's total full-time programme is set to 0 Planned Hours in a single academic year regardless of the **Normal Duration** set for the course in the **Duration and Tolerance** panel. The combination of Qualification and Non-Qualification hours count collectively towards the total of Planned Hours per Year. (Schools in England only).

10. Enter any relevant **Notes** that relate to the delivery of the course. The **Notes** field allows the entry of up to 1000 characters.
11. Click the **Save** button to save the details and activate the remainder of the page.

**NOTE:** The remainder of the **Course Details** page can only be edited if you click the **Save** button after entering **Basic** details.

### Course Details - Examination Panel

The data displayed is dependent on the most up-to-date Examinations Basedata having been imported into Examinations Organiser. The **Award** name, the **Board** offering the qualification, the **Qualification** level and the **Award** code are displayed.

The **From** and **To** date fields in the **Examination** panel are blank initially because the previous version of Course Manager did not maintain the history between courses and exams. The awards are displayed in yellow to indicate that the date that they were associated with the course is not known. You can only have one award associated with an examination at a time so you must determine which of the awards is the current one.

Click into each of the date fields to display a drop-down arrow. Click the arrow to display the **Calendar** and select the appropriate date range for each award. If the date ranges for the awards overlap, they remain displayed in yellow until the overlap is fixed.

The **Reason** field enables you to enter a free text explanation detailing why the award associated with the exam was changed, if you wish.
The **Certification Elements** panel displays the elements for seasons that are relevant to the highlighted award within the **From** and **To** date range. Click anywhere in a certification element row to display the **Element Details** pane and view all the pertinent information about the element.

1. If the awards displayed are not currently linked to the course, click the **New** button to display the **Select Awards** dialog.

2. Enter the **Award Title** or the name of the **Qualification**, if known.

3. Alternatively, click the **Search** button to display a list of all the **Award Titles** that are available for selection, including awards that are already associated with another course. You can now link a course to more than one exam award at a time.
If you select an exam award that is already linked with another course, a warning message is displayed.

4. Click the Yes button to end the existing award/course association. An end date of yesterday’s date is given for the termination of the award/course association. Alternatively, click the No button to return to the Select Awards dialog and continue to search for the relevant award.

5. If any overlapping award dates are found, a warning message is displayed and you must rectify the date range before you can save the changes.

Course Details - Classification Panel

This panel enables you to select additional attributes for the course. The codesets available vary depending on the location of your school.

In England, the following codesets are available:
- Level
- QAN
- DAS Generic QAN
- PPos (these must be entered manually because there is no pre-defined code list)
- Provider UKPRN (England only).

1. Click into each of the date fields to display a drop-down arrow. Click the arrow to display the Calendar and select the appropriate date range for each codeset. If the date ranges for the codesets overlap, the dates must be changed to rectify this.

   The Reason field enables you to enter a free text explanation of why the codeset associated with the course was changed but this is not mandatory.

2. If the codeset(s) displayed is not currently linked to the course, click the New button to display the Select Code dialog.

Multiple UKPRN providers and Learning Activities/Mediums can be added to a single course as long as the date ranges do not overlap.
For schools in Wales, the following codesets are available:

- QCA
- WG Learning Medium
- QWAD
- WG Disability Status
- WG Learning Provider
- WG Learning Activity.

1. Highlight the required **Codeset** to display a list of related codes in the lower section of the dialog.
2. Search for the required code by entering the code number in the **Containing Code** field or by entering some related text in the **Containing Description** field before clicking the **Go** button. The list of related codes displayed is updated to reflect the search criteria entered.
3. Highlight the **Code** to be associated with the course.
4. Click the **OK** button to return to the **Classification** panel.

The related **Codeset**, **Code**, **Description**, **QWAD Expiry** (schools in Wales only), **QAN Subject** and **QAN Expiry**, **From** and **To** date columns and a **Reason** column are displayed.
5. If a code has been added in error, or if you want to change the code associated with the selected course, highlight the existing code and click the Delete button. Repeat Steps 1-4 to add a different code.

**IMPORTANT NOTE:** Deleting a code should be performed with caution. For example, removing a code from an active course has serious implications for the School Census.

**More Information:**
Viewing Assessment Marksheets as a Course Supervisor on page 13

**Course Details - Supervisors Panel**
This panel enables you to select the supervisor(s) to be associated with the selected course. It also displays any supervisor(s) already associated with the course.

<table>
<thead>
<tr>
<th>Supervisors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Details indicates that Class Supervisors should NOT be auto-update from chosen Courses Supervisors</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Forename</th>
<th>Initials</th>
<th>Title</th>
<th>Main</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrews</td>
<td>Sally</td>
<td></td>
<td>Course Coordinator</td>
<td>✓</td>
<td>11/02/2016</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** When selecting the course supervisor(s), select their Supervisor Title with care as this will affect their ability to view Assessment marksheets associated with the selected course and classes.

1. Click the New button to display the Select person dialog and search for the person who is to be assigned as a supervisor.

The Role of the person defaults to Employee but can be changed by selecting an alternative from the drop-down list.
The list of people displayed can be further refined by entering the first few characters of the person’s **Surname** or **Forename**.

2. Click the **Search** button to display the people who match the search criteria entered.

3. Highlight the person to be assigned as the **Supervisor** and click the **OK** button to display the **Add Supervisor** dialog.

4. Select the **Supervisor Title** from the drop-down list. Available options include **Supervisor**, **Head of Department**, **Second in Department**, **Curricular Manager**, **Head of Faculty** and **Course Co-ordinator**.

5. Click into each of the date fields to display a drop-down arrow. Click the arrow to display the **Calendar** and select the date range during which the selected person will be assigned a supervisory role for the course.

   The **End Date** can be left blank if no definite end date for this person’s supervisory role has been decided.

   Once the Supervisor details have been entered, click the **OK** button to return to the **Supervisors** panel on the **Course Details** page.

   A supervisor whose title is **Course Co-ordinator** is assigned as the **Main** supervisor of the course, as indicated by the selected check box. It is not possible to have more than one Main supervisor during the same date range.

To remove the role of course co-ordinator from a staff member, highlight their name in the **Supervisors** panel and click the **Delete** button.

**NOTE:** The Course Supervisor can be made a Supervisor of all classes linked to the course.
Course Details - Classes Panel

This panel enables you to select the classes to be associated with the selected course. It also displays those classes already associated with the course.

The Class code, the name of the Staff member and the From and To dates are displayed for existing standard classes. Alternative Curriculum classes are also available for selection.

1. Click the New button to display the Select Class dialog.

The Match by Subject check box is selected by default. This refines the list of available classes to those that have been associated with a matching subject.

Click any of the column headings to sort the results displayed.

If the class to be associated with the course is not displayed, deselect the Match by Subject check box to display a list of all classes in the current Academic Year. Alternative Curriculum classes are listed for selection when the Match by Subject check box is deselected.
2. Highlight the class to be associated with the course.

   **TIP:** Multiple classes can be selected by holding down the **Ctrl** key and clicking each class. Alternatively, to select a block of sequentially listed classes, click the first class name in the block, hold down the **Shift** key and then click the last class name in the block.

3. Click the **OK** button to return to the **Classes** panel.

4. If a class has been added in error, highlight the class and click the **Delete** button.

   **IMPORTANT NOTE:** The deletion of a class should be performed with caution. For example, removing a class from an active course removes all student class memberships.

### Course Details - Memberships and Results Panel

This panel displays the details of all the pupil/student memberships for the selected course. This includes their full **Name**, the **YTI** (Year Taught In), their **Reg** group, their individual **ULN** (Unique Learner Number), their current **Class**, the **Start** and **End** date for each of their memberships as well as the **P End** (Planned End Date), a **Core Aim** flag (where applicable), their current **Status**, the **Reason** (for withdrawal) column (England and Wales only), the **Protect** column, the **Result** that they have achieved, the **AO QAN/Disc** code and the **QWS QAN/Disc** code.

An additional column has been provided adjacent to the **QWS QAN/Disc** column that enables you to record whether the Learning Aim is **Non Funded**.

   **NOTE:** Hours spent studying for a Non Funded Learning Aim are excluded from the calculation made when the **Calculate Hours from Courses** button is clicked on the **Maintain Post-16 Programmes of Study** page. If Maths or English are being studied as a result of lack of Prior Attainment, these courses should not be marked as Non Funded.

Additionally, where the provider of a course for Post 16 students is other than the school, the relevant **Provider UKPRN** (England only) can be selected from the drop-down list. If students are engaged in a traineeship programme, this can be indicated by clicking in the **Traineeship** column.
03 | Maintaining Courses

Changing Start, End and Planned End Dates

If you want to amend any of the course dates, click into the required column, select the drop-down arrow and select an alternative date from the Calendar. The course End date refers to the date on which the course of study is scheduled to end, and the P End date refers to any exceptions to this End date for one or more pupil/students on the course. The P End date cannot be earlier than the course End date.

Setting Core Aim Flags

From October 2013, it has been possible to specify which course of study is deemed to be a Core Learning Aim for each pupil/student. A Core Learning Aim flag indicates that this course is the primary course of study for the pupil/student in their Programme of Study. Only one course of study per pupil/student can be flagged as a Core Learning Aim per academic year. If the pupil/student is enrolled on a two year course of study, you must flag the second year of study as a Core Learning Aim when the academic year changes.

Core Aims are academic year based and the Core Aims column is not displayed if the default of Census View is selected in the Find Course browser. This is because the From and To date range for the Census View spans two academic years.

IMPORTANT NOTE: If you want to view or edit the Core Aim column of a pupil/student in the Memberships and Results panel, you must ensure that you select either the Current Academic Year or the Previous Academic Year from the View Memberships field in the Find Course browser.

If you do not select a single academic year view from the View Memberships drop-down list in the Find Course browser, the following narrative is displayed above the Memberships and Results panel and the Core Aim column is not visible.

If you want to change the Core Aim flag for multiple pupil/students, right-click the Core Aim cell for an individual pupil/student and select the Set this course as Core Aim for all these students hover help. This assigns the Core Aim flag to all pupil/students in year 12 and above in a single academic year.
You can also remove an existing Core Aim flag from a pupil/student by clicking into the populated cell of the Core Aim column adjacent to their name. A warning message is displayed.

![Warning message]

Click the Yes button to remove the Core Aim or click the No button to cancel the process.

**IMPORTANT NOTE:** Schools in different regions can access various additional columns in the Memberships and Results panel: Welsh schools can specify a Withdrawal Reason and indicate the Retake status, schools in Northern Ireland can indicate the Retake status and English schools can specify a withdrawal Reason, indicate the Non Funded status and specify the Provider UKPRN.

**Changing the Status**

If a pupil/student has left the course because they have left the school or because they are concentrating their time on other course subjects, select Withdrawn from the Status drop-down list. Select the withdrawal Reason from the drop-down list to record why the pupil/student is leaving a course or learning aim before the expected end date. The options are:

<table>
<thead>
<tr>
<th>Learning Aim Withdrawal Option</th>
<th>Learning Aim Withdrawal Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other provider (gov)</td>
<td>Learner has transferred to another provider to undertake learning which meets a specific government strategy</td>
</tr>
<tr>
<td>Other provider</td>
<td>Learner has transferred to another provider</td>
</tr>
<tr>
<td>Injury/illness</td>
<td>Learner injury/illness</td>
</tr>
<tr>
<td>Financial</td>
<td>Financial reasons</td>
</tr>
<tr>
<td>Personal</td>
<td>Other personal reasons</td>
</tr>
<tr>
<td>Exclusion</td>
<td>Learner has been excluded</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
</tr>
<tr>
<td>Not known</td>
<td>Reason not known</td>
</tr>
</tbody>
</table>
If the pupil/student stops studying this course or learning aim to begin to study another, select **Transferred** from the **Status** drop-down list instead of **Withdrawn**.

**Protecting Pupil/Student Memberships**

It is possible to safeguard any pupil/student course memberships against changes that might be made to the data through the **Update Course Memberships** routine. This ensures that the pupil/student’s course membership is not affected by running this routine.

**IMPORTANT NOTE:** Planned End Dates for student memberships in year taught in 10/11 and 12/13 are kept in line with a Two Year Duration setting for a course, as defined in the **Duration and Tolerance** panel. This means that student memberships no longer need to be protected and the **Protect** column in the **Memberships and Results** panel does **not** need to be ticked to prevent the Update Course Memberships routine from reversing any manual changes made to the Planned End Date.

However, if you wish to protect a particular student's membership from changes, click in the **Protect** column before clicking the **Update All Course Memberships** button in the **Find Course** browser. Effectively, it means that a student is still a member of the course but may no longer be attending any of the associated classes.
1. If you want to assign additional pupil/students to this course, click the New button to display the Select Members dialog.

![Select Members dialog]

2. Enter the Surname or Forename for the required member, if known. The Role field automatically defaults to Student and this is read-only. The Effective Date field at the top of the Select Members dialog defaults to today’s date but this can be changed by selecting an alternative date from the Calendar. This sets the date for when the student’s membership takes effect in conjunction with the radio buttons at the bottom of the Select Members dialog.

3. Click the Search button to list the members who match the search criteria. Alternatively, you can assign membership of the course based on the membership of an existing group. Select the Group Type from the drop-down list, e.g. Class, Year, Group, etc. to activate the Group field.
a. Click the **Browser** button adjacent to the **Group** field to display the **Groups Browse** dialog and select the group from which you want to populate the course.

![Groups Browse dialog]

b. Enter a partial **Description**, if known and click the **Search** button.
c. Select the **Short Name** of the required group and click the **OK** button to return to the **Select Members** dialog.

d. Once the required group has been selected, the name is displayed in the **Group** field. If the **Group Filter** was selected in error, click the **Delete** button to remove it.

e. Click the **Search** button to list the members of this group.

4. Highlight the individual student(s) who will be assigned membership of the selected course or click the **Select All** button to select all the students.

Multiple students can be selected by holding down the **Ctrl** key and clicking each person's name or, to select a block of sequentially listed students, click the first name in the block, hold down the **Shift** key and click the last name in the block.

If you make a mistake with your selection, click the **Deselect All** button and start your selection again.

If you want to specify a different period of student membership for the course, select one of the radio buttons at the bottom of the **Select Members** dialog:

- Select the **From effective date to end of academic year (dd/mm/yyyy-dd/mm/yyyy)** radio button to set the course membership from today's date to the last day of the current academic year.
- Select the **Over the whole academic year (dd/mm/yyyy-dd/mm/yyyy)** radio button to set the course membership for the whole of the academic year.
Select the **Next Academic Year** radio button to set the course membership for the whole of the next academic year. This option is only available if the next academic year has previously been defined in SIMS.

Select the radio button adjacent to the **From** and **To** date fields to set a specific date range over which the selected student(s) will be members of the course. Click the respective **Calendar** button and select the dates as required.

5. Click the **OK** button to return to the **Memberships and Results** panel.

The **Delete** button enables you to delete a student from the course who has been added incorrectly in the first place. This does not constitute terminating their membership of the class, this must be done in the **Curriculum Assignment by Student** routine.

If an exam result has been manually amended, perhaps because of an appeal, the **Recalculate Results** button can be used to recalculate the results for the affected course. Where an exam result is available, this routine continues to make use of the QAN and Discount code associated with that exam result and only makes direct use of the QWS QAN and Discount code where an exam result is not available.

6. Click the **Results Report** button to display the **Results Report**. This displays all the results for all memberships and shows a **Best Result** in a different shaded colour.

**More Information:**
*Running the Update All Course Memberships Routine on page 67*
Dealing with Exceptions

It is possible to effectively remove a student from a course but still allow them to attend the associated classes by adding an Exception record. When the Exception record is created, the student’s course membership is ended as of yesterday’s date.

1. Click the Memberships and Results hyperlink to display the Memberships and Results panel.
2. Highlight the student to be removed from the course.
3. Click the Exception button.

The student’s name is displayed in the Exceptions list in the bottom section of the page. In the top section of the Memberships and Results panel, the student’s course membership End Date is changed to yesterday’s date.

4. Click the Save button.

**WARNING:** It is **very important** that the Save button is clicked after adding an Exception record.

5. You may now edit the End Date of the membership to the date that the student stopped studying the course if it was not yesterday, or you can delete the membership altogether if the student is in the class but was never studying the course. The Exception record will remain.

6. To remove an Exception record and reinstate a student’s course membership, select the Delete check box(es) adjacent to the applicable student in the Exceptions list and click the Save button. The course membership will be reinstated from the class on running the Update Course Membership routine.

**NOTE:** You cannot protect the remaining membership after making an Exception. If you try to do this, an error message is displayed.
03 | Maintaining Courses

Deleting an Exception

1. Click the Memberships and Results hyperlink to display the Memberships and Results panel.

2. In the Exceptions panel, select the Delete check box adjacent to the name of the student with an exception that you want to delete.

3. Click the Save button to delete the exception.

Printing Course Details

Click the Print button from within the Course Details page to print a paper copy of all the course information contained in this page.

Deleting a Course

**IMPORTANT NOTE:** The deletion of a course should be performed with caution. For example, deleting a course removes all student class memberships and has serious implications for the Census Returns. If you attempt to delete a course that is in use somewhere in SIMS, e.g. it is linked to an Assessment Manager Marksheet or a Profiles Session, the Activity Log is displayed.

You must remove all existing links to the course before you are permitted to proceed.
1. Select **Tools | Academic Management | Course Manager | Maintain Course** to display the **Find Course** browser.

2. Search for the course to be deleted.
3. Click the **Delete** button.

**Adding a New Course**

It is unlikely that you will need to add a course manually using the **New** button because you can link a course to various Exam Awards and QANs throughout the life of the course.

**IMPORTANT NOTE:** It is imperative that Levels are assigned to courses correctly. When adding new courses, the use of 'Other' as a Level identifier should be kept to an absolute minimum.
04| Managing Student Memberships

Introduction

Membership of a course is generally dependent on a student's attendance at classes that are associated with the course.

However, a student can be a member of a class but not be a member of the corresponding course. In this instance, the student's class membership should be protected so that running the Update All Course Memberships routine does not override the actual situation. It is also possible for a student to be a member of a course that has no corresponding lessons.

More Information:
Course Details - Memberships and Results Panel on page 37

The Impacts of Completion and Continuity Tolerance on Student Memberships

The value specified in the Default Completion Tolerance field in the Update Course Manager Settings page is applied globally to all courses. However, you can modify the Completion Tolerance field for an individual course in the Course Details page, as appropriate.

This value relates to the difference between the Planned End Date of the course and the actual end date of the student's membership of this course. If the actual end date of the student's membership of a course falls within the value specified in the Default Completion Tolerance or Completion Tolerance fields, the student is deemed to have completed the course.

The value specified in the Default Continuity Tolerance field in the Update Course Manager Settings page is also applied globally to all courses. Again, you can modify the Continuity Tolerance for individual courses in the Course Details page, as appropriate.

This value indicates the period of 'a gap in time' during the expected course duration that a pupil/student can temporarily leave the course and then return to it and still be deemed to have completed the course. This ensures that their membership of the course is not affected by the hiatus and this is reflected as a continuous membership instead of two separate memberships.
Changes made to a student's course and class memberships obviously impact their curriculum and the **Curriculum Assignment by Scheme** and the **Curriculum Assignment by Student** routines in Academic Management are used when modifying student memberships.

### Modifying Student Memberships

A number of situations can occur on a regular basis that require you to modify a student's class and course memberships. Some of the more common situations are detailed in this chapter.

1. Select **Focus | Student | Curriculum Assignment by Student** to display the **Find Student for Curriculum Assignment** browser.

   ![Find Student for Curriculum Assignment](image1.png)

2. Specify the search criteria to locate the required student and click the **Search** button.

3. Highlight the student and click the **Open** button to display the **Select Effective Date Range** dialog.

   ![Select Effective Date Range](image2.png)
Select the **Named Date Range** radio button to select a pre-defined date range. This might be a complete academic year (e.g. 01/09/200n to 31/08/200n), a working academic year (e.g. 01/09/200n to 22/07/200n, the time that students actually spend at school) or specific terms (e.g. Spring term 200n-200n).

Select the **Custom Date Range** radio button and enter the required start and end date. Select this radio button if a change that you want to record does not start until next week, for example. Select the **From** and **To** dates by clicking the appropriate **Calendar** button and selecting a date from the Calendar.

Two check boxes are provided at the bottom of the dialog, which enable further refinement of the Effective Date Range.

Select the **Restrict date range from today to end** check box if you want to restrict the Effective Date Range to run from today’s date to the end of a **Named Date Range**. This option is available only if a **Named Date Range** is selected and if today’s date lies within the date range you choose.

Select the **Don’t ask me again (this session or until manually changed)** check box if you do not need to select the date range each time a Scheme is selected from the browser in this session.

4. Once the required date range and check boxes have been selected, click the **OK** button to display the student’s **Schemes**.

Once this page is displayed, the browser is hidden automatically. It can be displayed again if required, by clicking the **Browse** button.

5. Right-click the **Scheme** that will be affected by the change and select **Open Details** to display the **Historical Curriculum Membership Details** dialog.
The green line represents today's date and the red line indicates the end of the Effective Date Range.

6. Drag the orange timeline for the affected class to the required end date and click the **OK** button.
7. Click the **Save** button on the **Student Curriculum Summary** page to display the **Course Membership(s)** dialog.

The changes made to the student's course membership are displayed.
8. Right-click in the **Status** column and select the appropriate option from the drop-down list.
   - if the student's class membership ended within the Completion Tolerance specified for the course, the **Status** defaults to **Completed**.
   - if the student's class membership ended outside of the Completion Tolerance specified for the course, the **Status** defaults to **Withdrawn**.
   - if the student has swapped to a different class that is associated with the same course but still within the Completion Tolerance specified for the course, the **Status** remains unaffected.
   - if the student transfers to a completely different course, the **Status** defaults to **Transferred**.

9. Click the **OK** button to return to the **Student Curriculum Summary** page.

**NOTES:** It is only possible to extend class memberships within the specified Course Duration. For example, class memberships cannot continue for two years if the Course Duration is only for one year. If a student’s class membership is amended in Academic Management, their course memberships are updated automatically without the need to manually run the Update Course Memberships routine.

**Leaving a Class and then Resuming**

If a student has a class membership of a course with a Planned End Date that is more than one day after the start date of another relevant class membership, the course membership will have a gap inserted unless each of the following is true:

- The gap in working days between the class memberships is within the **Default Continuity Tolerance** specified for the course.
- The returning date for the second class membership is not after the Planned End date indicated by the **Default Course Duration**.
Leaving a Class and Not Resuming

If a student 'drops' a class and will no longer be attending classes associated with the course, their course membership should be recorded as Withdrawn in the Course Membership(s) dialog.

Leaving a Course before the Planned End Date

If a pupil leaves a course, by leaving a relevant class, before the Planned End Date of the course, they can still be deemed to have completed the course if the difference between the date of leaving the class and the Planned End Date for the course membership is within the Completion Tolerance for the course.

Where leaving a class has been deemed to indicate completion of the course, both the End Date and the Planned End Date for the course are set to the date of leaving the class.

Leaving the School Before the Planned End Date of the Course

- If a student leaves school after finishing their exams but before the Planned End Date of the course they have been studying, as long as their date of leaving falls within the time period specified in the Completion Tolerance for the course, the student is considered to have completed the course.

- If a student leaves your school altogether, they should be recorded as a Leaver via Routines | Student | Leavers. This terminates all their class and course memberships, so no remedial action is necessary in Course Manager. Additional course memberships must not be added.
In the unfortunate event of a student's death, their class and course memberships should be marked as **Withdrawn** and they should be recorded as **Deceased** via the **Leavers** routine.

**Transferring From One Course to Another**

A student may decide to ‘swap’ from one course and embark on a course of study for a different subject. Where this occurs, the course **Status** for the original course of study should be recorded as **Transferred**.
If a student wants to change classes but continues to study the same course that is associated with both the original and the new class, their course membership is not affected.

**Managing Resits**

Resits are undertaken when students resubmit coursework or sit for an exam again without having attended any additional lessons other than perhaps, revision sessions.

It is not a requirement that schools include information about resits in the School Census.

**Managing Retakes**

Retakes occur when a student opts to begin a complete qualification again, including their attendance at regular lessons. Retakes should be recorded as a new Learning Aim for every student and included in the School Census.

**Maintaining Post-16 Programmes of Study in England**

The annual hours that count towards a course of study are categorised as Qualification - Planned Learning Hours or Non-Qualification Hours - Planned Employment, Enrichment and Pastoral Hours. To qualify for funding purposes, Planned Hours must be timetabled within your school's normal working pattern.

You can record information relating to Programmes of Study for Post-16 pupil/students, enabling you to submit details of the total Planned Qualification Hours and Planned Non-Qualification Hours in the Autumn School Census.

1. Select **Tools | Academic Management | Course Manager | Post-16 Programmes of Study** to display the **Maintain Post-16 Programmes of Study** page.

The **Academic Year** defaults to the current academic year set in SIMS. The current, previous and next academic year definitions are available for selection.

2. Select a different year from the **Academic Year** drop-down list, if required.

3. The **Effective Date** field defaults to the date of the Autumn School Census that falls within the selected **Academic Year**. This field is read-only.
You can update the information displayed on the **Maintain Post-16 Programmes of Study** page to reflect the pupil/students and the courses they are undertaking at any time by clicking the **Refresh** button. Only pupil/students who are assigned to Post-16 courses are displayed.

4. Enter a pupil/student’s name in the **Student** field to locate a specific pupil/student. All Post-16 pupil/students with a matching or partially matching name are displayed. Alternatively, select a **Level(s)** from the drop-down list. Only levels in use in your school are displayed for selection.

5. Select the **Year Taught In** (YTI) from the drop-down list. You can select `<Any>`, year **12** or year **13**. The **Occurrences** counter defaults to `>=1`.

6. Select the **Reg Group** from the drop-down list.

7. Select the relevant **Subject** from the drop-down list, if required.

8. Select the **Enrolment Status** from the drop-down list. The default is set to `<Any>`.

9. You can also choose to display only those pupil/students with **Unassigned hours** by selecting the check box. This enables you to identify pupil/students assigned to courses who need to have the **Planned Hours per Year** section completed in the **Course Details** page. If a value of zero has been entered into either of the columns, this value is treated as a blank allocation of hours and is displayed when the **Unassigned hours** check box is selected.

The **Reset Filters** button enables you to restore the default settings.

The pupil/students are listed with their **Year Taught In** (YTI), **Reg group**, **Enrolment Status**, Date of Leaving (DOL), if applicable, a **Core Aim** indicator and an abbreviated list of **Other Courses** that they are assigned to.

10. Where you have entered the **Planned Hours per Year** for each individual course of study on the **Course Details** page, these totals are carried through into the **Qual Hours** and **Non-Qual Hours** columns of the **Maintain Post-16 Programmes of Study** page when you click the **Calculate hours from courses** button.

**NOTE:** Hours spent studying for a non-funded Learning Aim are excluded from the calculation. Where Maths or English are being studied as a result of lack of Prior Attainment, these courses should not be marked as non-funded.

11. Right-click anywhere in the table to display a pop-up menu. You can access their **Student Details** page, their **Student Courses** page or Select All the pupil/students from this menu.
The TT Hours column enables you to check the accuracy of Planned Hours for a timetabled Programme of Study.

12. If you want to manually amend the totals for a specific pupil/student, highlight their name in the list, click into the Qual Hours or the Non-Qual Hours column(s) and enter a different total.

13. If you want to manually amend the totals for all the pupil/students at once, right-click anywhere in the list, press Ctrl & A to Select All the pupil/students in the list and enter a different total in the Qual Hours or the Non-Qual Hours column(s). Alternatively, enter a figure in the box adjacent to the green arrow button at the top of either the Qual Hours or the Non-Qual Hours column(s) to flood fill the entire column with the figure entered. You can also enter a figure in the Threshold box, enabling you to check that a pupil/student's full time funding is accurate before it is included in the School Census Return.

The combined hours for each pupil/student and their Post-16 Programmes of Study are displayed in the Total Hours column. The figure displayed in this column will be shown with a yellow background to indicate that the figure is less than the figure you specified in the Threshold box.

You can also enter a brief set of Notes to indicate the reason for the manually assigned hours. This will enable you to reconcile and validate your School Census return in conjunction with the Programmes of Study Report accessible from Routines | Statutory Returns | School Census.

14. If you want to determine the total Qual Hours and Non-Qual Hours figures for a pupil/student, for all the courses that they are assigned to, based on the information entered on the Course Details page, click the Calculate hours from courses button.

If you have selected the Overwrite existing values check box before clicking the Calculate hours from courses button, the following warning message is displayed.
15. Click the **OK** button to continue or click the **Cancel** button to abandon the process.

16. If you want to preserve any existing figures that are present in the **Qual Hours** and **Non-Qual Hours** columns, ensure that the **Overwrite existing values** check box is not selected before you click the **Calculate hours from courses** button. A message dialog is displayed.

17. Click the **Cancel** button to abandon the process.

18. Alternatively, click the **OK** button to collate all the Qualification and Non-Qualification totals that have been specified in the **Planned Hours per Year** section of the **Course Details** page for each course, and populate the respective columns with the cumulative total for each pupil/student according to the courses that they are assigned to.

19. Click the **Save** button.

20. Click the **Report** button to print the **Maintain Post-16 Programmes of Study** page in .html format. It is also possible to include **Programme of Study** fields in any **Student** focussed reports that you design in SIMS, as well as other fields relating to **Courses**.
Maintaining Post-16 Programmes of Study in Wales

This page displays all students included in the Post-16 PLASC Return and enables you to manage the courses being studied for each of these students. The calculations made on this page are not suitable for funding purposes and this page should be considered as an aid rather than as an exact representation of courses being studied. If the calculations appear to be incorrect, it is possible to change the figures manually.

1. Select **Tools | Academic Management | Course Manager | Post-16 Programmes of Study** to display the **Maintain Post-16 Programmes of Study** page.

The following graphic has been modified for display purposes so that all buttons and columns are visible.

The **Academic Year** defaults to the previous academic year. The current, previous and next academic year definitions are available for selection. It is possible to calculate the Programmes of Study for the previous academic year.

2. Select a different year from the **Academic Year** drop-down list, if required.

You can update the information displayed on the **Maintain Post-16 Programmes of Study** page to reflect the students and the courses they are taking at any time by clicking the **Refresh** button. Only students who are assigned to Post-16 courses are displayed.
3. Enter a student's name in the Student field to locate a specific student. All Post-16 students with a matching or partially matching name are displayed. Alternatively, select a Level(s) from the drop-down list. Only levels in use in your school are available for selection.

4. Select the Year Taught In (YTI) from the drop-down list. You can select <Any>, year 12 or year 13. The Occurrences counter defaults to >=1 but you can select an alternative value from the drop-down list.

5. Select the Reg Group from the drop-down list.

6. Select the relevant Subject from the drop-down list, if required.

7. Select the Enrolment Status from the drop-down list. The default is set to <Any>.

8. You can also choose to display only those students with Unassigned hours by selecting the check box.

The Reset Filters button enables you to restore the default settings.

The students are listed with their Year Taught In (YTI), Reg group, Enrolment Status, Date of Leaving (DOL), if applicable, and an abbreviated list of the Courses they are studying.

Where programmes of study have already been specified for some students, the Programme column, the Start Date, End Date, Expected End date (July), the Completion Status, the Length and Year columns (only displayed from academic year 2017-2018, and a default value of 1 - zero is not valid), the total of Guided Hours and an additional column to add any relevant Notes.

NOTE: The Completion Status of Withdrawn should not be used to indicate that a student has left and enrolled with another provider.

The Guided Hours column benefits from hover help, which displays an amalgamation of the hours entered in the Tuition Hours field on the Maintain Course page for each course being taken by the selected student.

You can also access an individual’s Student Details page, their Student Courses page or Select All the students by right-clicking anywhere on the Maintain Post-16 Programmes of Study page and selecting the required option from the pop-up menu.
Resetting all Programmes of Study

Existing calculations for a selected academic year can be reset before recalculating them (based on the latest course information) by clicking the Calculate Programmes of Study button. Columns can be blanked for an individual student or for multiple students by right-clicking in the Programmes of Study grid and selecting Select All.

1. Click the Reset all Programmes of Study button.

2. Click the OK button.
   The previously calculated details are removed from all the columns in the Programmes of Study grid.

3. Click the Undo button, if required. The following graphic is for representation purposes only.

4. If you want to revert to the previously calculated details, click the Yes button. Alternatively, click the No button to reset the calculations for all Programmes of Study.

NOTE: Clicking the Reset all Programmes of Study button does not calculate the cohort again.

The mapping table provided by the Welsh Government is used to populate the Programme column. Course memberships with the status of Transferred or Withdrawn are not included but the Learning Activity Reference on the reference date of 31/07/201n is considered.
Calculating the Programmes of Study

It is possible to recalculate the details displayed in the columns of the Programmes of Study grid after clicking the Reset all Programmes of Study button. Columns can be recalculated for an individual student or for multiple students, and only for those students who have not been withdrawn from or transferred to a different programme of study, by right-clicking in the Programmes of Study grid and selecting Select All. From the 2018-2019 academic year, the calculations are based on the QWAD information, not the Learning Activity references.

NOTE: Clicking this button provides a 'best estimate' calculation based on the mappings provided by the Welsh Government, not a definitive calculation. If the values displayed are not satisfactory, manually enter the values that you require.

1. Click the Calculate Programmes of Study button.

2. Click the Yes button to recalculate the figures in the Programmes of Study grid. Alternatively, if you want to retain the existing details, click the No button to abandon the process.

Removing a Programme of Study

It is possible to delete student(s) details from the Programmes of Study grid, if required. However, if a student has more than one row displayed, a row with the status of Transferred cannot be deleted.

1. Click the Remove Programme button.

2. Click the OK button to remove the Programme of Study details for the selected student.
Transferring a Student to another Programme

A student can be enrolled on only one active Programme of Study at a time.

1. If you want to move a student to a different Programme of Study, highlight their name and click the **Transfer Programme** button to display the **Transfer Programme** dialog. The **Existing Programme** of study is displayed for information.

![Transfer Programme dialog](image)

2. Select an alternative programme from the **Type of Transfer** drop-down list.
   - If **Transferred - different provider** is selected, an **End Date** must be recorded before clicking the **OK** button. A new Programme of Study is **not** created for the selected student. The **End Date** defaults to the last day of the currently selected academic year (July) but this can be changed by selecting an alternative date from the Calendar.
   - If **Transferred - same provider** is selected, select an alternative course from the **New Programme** drop-down list.

![Transfer Programme dialog](image)

3. Click the **OK** button.
On the **Maintain Post-16 Programmes of Study** page, an additional row is displayed for the student's new Programme of Study, with the specified **Start Date** and the **Completion Status** of **Continuing**. The row detailing the student's original Programme of Study is marked as **Transferred** with an **End Date** that precedes the specified **Start Date** of the new course by one day.

Details that have been changed but not yet saved are displayed in bold text. The action buttons are not available when a **Transferred** row is highlighted.

4. **Click the Save button.**

**Calculating Hours from Courses**

A total of guided hours can be calculated for individual students for the programmes of study being studied during the selected academic year, and only for those students who have not been withdrawn from or transferred to a different programme of study.

1. Highlight the required student(s) or right-click and **Select All** before clicking the **Calculate Hours from Courses** button to determine how many **Guided Hours** are required for each student.

The calculation is based on the **Tuition Hours** assigned to each course being studied by the selected students via **Tools | Academic Management | Course Manager | Maintain Course**.

If you have selected the **Overwrite existing values** check box before clicking the **Calculate Hours from Courses** button, the following warning message is displayed.

2. **Click the OK button** to begin the calculation process.

The **Guided Hours** column is populated for the selected student(s).

3. **Click the Save button.**
Overwriting Existing Values

It is possible to assign a value of **Guided Hours** to a single student by highlighting their name in the list. To highlight all the students in the list, right-click and select **Select All** before overwriting existing values.

1. Enter a total of hours in the box adjacent to the **Overwrite existing values** check box, select the check box and then click the green down arrow. The following warning message is displayed.

![Warning message](image)

2. Select the appropriate radio button and click the **OK** button. The **Guided Hours** column is populated in accordance with the option selected.

Click the **Report** button to print the **Maintain Post-16 Programmes of Study** page in HTML format, if required. It is also possible to include **Programme of Study** fields in any **Student** focussed reports that you design in SIMS, as well as other fields relating to **Courses**, including **Length** and **Year**.
Running the Update All Course Memberships Routine

Before running this routine, you must consider the following ramifications:

- student memberships have been protected, where applicable
- the Auto Update Membership check box has been selected in the Basic panel of the Course Details page for each individual course, where applicable.

This routine takes Course Duration and Course Tolerances into account.

1. Select Tools | Academic Management | Course Manager | Maintain Course to display the Find Course browser.

2. Click the Update All Course Memberships button.

A warning message is displayed, advising that this process can take a long time.

The Academic Year in which the memberships will be updated, is displayed at the top of the dialog. If you want to change the academic year before continuing, click the No button and then select Tools | Academic Management | Set Academic Year.

3. Click the Yes button if you want to proceed.
When the **Update All Course Memberships** routine has finished, the **Activity Log** is displayed.

4. If the curriculum course memberships have been updated successfully, click the **Close** button.

5. If any errors have been identified, click the **Print** button on the **Activity Log** so that you have a record of the errors you must investigate.

**Viewing a Student's Course Memberships from the Pupil/Student Details page**

Course memberships for the currently selected student can be viewed by clicking the **Courses** hyperlink in the **Links** panel on the right-hand side of the **Student Details** page to display the **Student Courses** page.

1. Select **Focus | Student | Courses** to display the **Find Student** browser.

2. Enter the relevant search criteria to locate the student whose course memberships you want to view.
3. Highlight the required student and click the **Courses** hyperlink to display their **Student Courses** page.

![Student Courses: Abbot Susan | Academic Year 2015/2016](image)

It is possible to change the student courses displayed by selecting an alternative to the default of **Current Academic Year**. The options include:

- **Current Course Memberships**
- **Previous Academic Year** and
- **Custom**. Where **Custom** is selected, additional date fields enable you to specify an exact date range within the **Current Academic Year** only. Click the **Calendar** buttons in the **From** and **To** fields to specify the date range required. Click the **Refresh** button to update the student courses displayed in line with the dates specified.

The tree structure is expanded and displays all courses for which the selected student is a member. The first node displays the selected student’s name. The second node displays the short name of the course, the course description and the start and end date. The third node displays the **QAN/QWAD/Discount Code** for the course. The **Result** for any completed course is also displayed on the third node, together with a status of **Transferred** (for schools in England only), **Retake** or **Withdrawn**. For schools in England, it is also possible to record a **Withdrawal Reason**, where applicable.
4. Click the Report button to display the Student Courses Report for the selected student. This report lists the Course Name, Course Description and Start Date and End Date for all courses with which the student is associated during the selected date range.

<table>
<thead>
<tr>
<th>Student Courses Report - Select Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Name</strong></td>
</tr>
<tr>
<td>English</td>
</tr>
<tr>
<td>Math</td>
</tr>
<tr>
<td>Science</td>
</tr>
</tbody>
</table>

You can also click a course name in the Student Courses page to view the Course Details page. This enables you to view all the details of the course together with the student memberships that were associated with the course during the selected date range.

**Setting a Core Learning Aim for a Course**

It is possible to specify which course of study is deemed to be the Core Learning Aim for each student. It is not required for students following academic programmes. Only one course of study per pupil/student can be flagged as a Core Learning Aim per academic year. If the pupil/student is enrolled on a two year course of study, you must flag the second year of study as a Core Learning Aim when the academic year changes.

1. Highlight the second node of the tree structure to select the short name of the course, together with the course description and the start and end date.
2. Right-click to display the pop-up menu and select **Set Core Learning Aim**. Alternatively, after highlighting the required course details, click the **Set Core Aim** button.

The course details are appended with the words **(Core Learning Aim)**. If you want to remove the **(Core Learning Aim)** flag from a course of study, highlight the course details, right-click and select **Unset Core Learning Aim** from the pop-up menu.
Alternatively, highlight the details of an alternative course of study and click the **Set Core Aim** button. This action removes the (Core Learning Aim) flag from the original course of study and flags the newly selected course as the (Core Learning Aim).

### Running the Reconcile with Exam Results Report

You can verify the consistency of Learning Aims information with Exam Results by running this report.

1. Select **Tools | Academic Management | Course Manager | Maintain Course** to display the Find Course browser.
2. Click the drop-down arrow adjacent to the **Reconciliation Reports** button and select **Reconcile with Exam Results** to display the **Reconcile Learning Aims & Exam Results** dialog.
3. **Select the Academic Year** by clicking the drop-down arrow and selecting from the list displayed.
4. If you have already specified a **Destination Folder** when running the **Reconcile with Exam Entries Report**, this destination is automatically supplied. If you want to change the destination, click the **Browser** button adjacent to the **Destination Folder** field to display the **Browse For Folder** dialog.
5. Navigate to the required storage location for the report output.
6. Click the **Export** button to create the report output.

When the reports have generated successfully, a message is displayed at the bottom of the **Reconcile Learning Aims & Exam Results** dialog.

7. Click the **Close** button.
8. Navigate to the specified storage location, highlight the required report output and double-click to open the report output in Microsoft Excel.

### Running the Reconcile with Exam Entries Report

You can verify the consistency of Learning Aims information with Exam Entries by running this report.

1. Select **Tools | Academic Management | Course Manager | Maintain Course** to display the **Find Course** browser.
2. Click the drop-down arrow adjacent to the Reconciliation Reports button and select Reconcile with Exam Entries to display the Reconcile Learning Aims & Exam Entries dialog.

3. Select the Academic Year by clicking the drop-down arrow and selecting from the list displayed.

4. Click the Browser button adjacent to the Destination Folder field to display the Browse For Folder dialog.

5. Navigate to the required storage location for the report output.
6. Click the **Export** button to create the report output.

![Image of the Reconcile Learning Aims & Exam Entries dialog]

When the reports have generated successfully, a message is displayed at the bottom of the **Reconcile Learning Aims & Exam Entries** dialog.

7. Click the **Close** button.

8. Navigate to the specified storage location, highlight the required report output and double-click to open the report output in Microsoft Excel.

### Running the Student Courses Report

This report provides information relating to student memberships of a course based on the course status.

1. Select **Tools | Academic Management | Course Manager | Student Courses Report** to display the **Student Courses Report** page.

![Image of the Student Courses Report]

**Managing Student Memberships**
The following report criteria can be selected:

- The **Year Taught In** (YTI) field defaults to *<Any>* but you can select a specific year from the drop-down list, if required.
- Select the relevant **Reg. Group** from the drop-down list.
- Select the required **Enrolment Status** from the drop-down list. This enables you to report on **Current** students or on **Leavers** only.
- If you want to view the details of a specific student, enter their name in the **Name** field.
- You can determine whether you want to group the printed report output by **Student, Reg. Group** or **None** by selecting the appropriate options from the **Grouping** and **Paging** drop-down lists.
- Select the relevant **Date Range** from the drop-down list. Selecting the **Custom** option activates the **From** and **To** date fields.
- Select the **Course Status** from the drop-down list. The options are *<Any>, Completed, Continuing, Future, Transferred* or **Withdrawn**.

2. When you have specified the required search criteria, click the **Search** button to populate the **Student Courses Report**.

3. Highlight the required student(s) and click the **Report** button to generate the report output.

**Starting Next Year's Timetable Early**

If you start next year's curriculum early in your school, this will have an impact on class and course memberships. If this year's student scheme memberships finish at the end of the Summer term, they need to be terminated at the date that the new timetable begins. This should be done to prevent old, as well as new students from appearing in class lists.

Schemes exist for the whole academic year, even if classes and student class memberships within the scheme have end dates before the end of the academic year, unless it was anticipated during the Summer that schemes would finish earlier. If it was not anticipated that the previous timetable would finish early and existing memberships need to be adjusted, this should be done before making the new assignments.

Where you want to show students as being in next year's classes, i.e. Year 12 students in Year 13 classes, you should consider the following:

- Class and course memberships for the previous year should finish on the correct date.
- The curriculum plan and timetable should be transferred from Nova for the next academic year.
- Students should be assigned to classes and courses for June/July.

If an early commencement of the next year's timetable results in an early start to courses, the affected courses should be recorded as such in Course Manager. This ensures that the Learning Aims are collected accurately in the School Census.

If extra-curricular activities are created, these can be defined with a Level identifier of 'Other'. This ensures that they are not collected in the School Census.
Preparing for the Census Return

Census Check List

The following activities must be completed before you begin to create the School Census Return:

- Upgrade to the latest version of SIMS.
- Set the required course durations, continuity and completion tolerances by specifying the Course Manager Settings.
- Ensure that the date range for exam awards that are associated with current courses is correct and that only one award is active at any one time.
- Process any Post 16 Leavers and calculate Planned Hours for current pupil/students in the previous and current academic years.
- Ensure that the Learning Aims status is correct for Leavers and use the Bulk Update Courses routine to amend the status where necessary.
- Create the timetable and assign the correct levels to all courses.
- Check that the courses created in Course Manager are present in the new academic year timetable.
- Amend existing courses and add all new required courses through the Maintain Course process.
- Assign student memberships for the new Year 12 and 13 classes.
- Import basedata into Examinations Organiser.
- Import the latest QWS QAN and QWAD catalogues.
- Link all new courses to the appropriate Exam Awards, QWS QAN and QWADs.
- Import the Exam Results from the Awarding Bodies into Examinations Organiser.
- Verify the Learning Aims and Results ready for the School Census.
- Enter Non-EDI Exams information into Examinations Organiser and link to a course.
- Import the latest version of the Performance Measures file (Wales only).
Running the Bulk Update Courses Routine - Remove August or September End Dates

If schools have inadvertently set the end date for classes to a date in August or September, this date becomes the membership planned end date for courses. This can result in some courses being excluded from the funding calculations. To prevent this becoming an annual problem that requires manual intervention, it is possible to run the **Remove August or September End Dates Bulk Update** routine, which changes the dates to 31 July.

Select **Tools | Academic Management | Course Manager | Bulk Update Courses** to display the **Bulk Update Course End Dates** page. This page is separated into two different routines:

- **Remove August or September End Dates**
- **Use Completion Tolerance to Reset Status**

Both of these routines enable you to retrospectively correct historical data that may have been defined incorrectly.

Before running the **Bulk Update** routine, it is suggested that you click the **Report** button. This displays an html report detailing the classes that will be corrected and the changes that will be made.

Running the **Remove August or September End Dates** routine performs the following actions within the parameters of **If Start Date is before August and Planned End Date is in August or September**:

- Set Planned End Date to 31st July
- If Actual End Date exists, set to 31st July
- Adjusts class and end dates in line
- If a Status exists, remove it
- Reports on the changes made.

Click the **Execute** button to run the routine and update the classes.
Running the Bulk Update Courses Routine - Using Completion Tolerance to Reset Status

Before running the **Bulk Update** routine, it is suggested that you click the **Report** button. This displays an html report detailing the changes that will be made.

Running the **Use Completion Tolerance to Reset Status** routine performs the following actions:

- **Set Planned End Date to Actual End Date**
- **Adjusts class end dates in line**
- **If a Status exists, remove it**
- **Reports on the changes made.**

Click the **Execute** button to run the routine and update the status for classes.
# List of Levels

In the following table, the **Code** is the abbreviation used in Course Manager, which Nova-T also uses to assign levels to classes.

**NQF** indicates the corresponding level in the National Qualifications Framework notation.

**Legacy** indicates the value used in recent versions of Nova-T, and **NI Legacy** indicates the value in the Northern Ireland version of Nova-T.

**IMPORTANT NOTE:** It is imperative that Levels are assigned to classes correctly. When manually creating a course, the use of 'Other' as a Level identifier should be kept to an absolute minimum.

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### BTEC Short Course Levels

BTEC Levels require explanation. There are three ‘widths’, Award, Certificate and Diploma, and (for school purposes) three levels.

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**Cambridge National and Technical Levels**

**Cambridge National Levels**
- Level 1/2 Award
- Level 1/2 Certificate
- Level 1/2 Diploma.

**Cambridge Technical Levels**
- Level 2 Certificate
- Level 2 Extended Certificate
- Level 2 Diploma
- Level 3 Certificate
- Level 3 Introductory Diploma
- Level 3 Subsidiary Diploma
- Level 3 Diploma
- Level 3 Extended Diploma.
Splitting AQA Basedata to Separate Certification Elements into Individual Awards

It may be necessary to link additional Awards to courses where the Basedata Award contains more than one certification element. This is most likely to occur with the AQA Basedata structure.

Before proceeding, the following prerequisites must have been carried out:

- In Examinations Organiser, ensure that you are viewing details for the correct Season by selecting **Tools | School Setup | Seasons**.
- You must also ensure that you have downloaded and imported the up-to-date Basedata for the appropriate Season before continuing.

The graphics in the following instructions are for illustration purposes only.

1. Select **Focus | Basedata** to display the **Basedata for (Season)** dialog.

In this example, the certificate for 4201 Art and Design (with units) and 4206 Art and Design Photography (with units), needs to be separated from the Art and Design main award 4200.
2. Expand the AQA node, right-click the GCSE node and select **Add a New Award** from the pop-up menu.

3. In the **Create New Award** dialog, enter the **Internal Title** and the **Description**.
4. Click the **Browser** button adjacent to the **Qualification** field and select **General Certificate of Secondary Education** from the drop-down list.

5. Click the **Save** button to return to the **Basedata for (Season)** dialog. The new Award is now visible in the Basedata structure.

6. Right-click the new Award in the Basedata structure.
7. Select **Include an Existing Element** to display the **Include Elements in Award** dialog.

![Include Elements in Award](image1)

8. Select the applicable **Available Items** and click the **Choose** button to copy them into the **Chosen Items** panel.

9. Click the **Update** button to add the certification and unit elements to the new Award in the Basedata structure.

![Update](image2)

You need to remove the old elements from the Award.

10. Right-click the element name and select **Detach Element From Award**.

![Detach Element From Award](image3)
A confirmation message is displayed.

11. Click the **Yes** button to proceed.
Repeat this process for any other Awards that need to be separated from Certification Elements.

**Welsh Schools Only - Calculating Programmes of Study using QWADs**

To ease the transition from the use of Learning Activity references to QWADs throughout 2018, the following flow charts have been included for reference.

**Rules for Calculating A2 Levels**
Rules for Calculating AS Levels

Rules for Calculating GCSEs
Rules for Calculating Welsh Baccalaureate

Qualification type = Welsh Baccalaureate
Skills challenge = 00007212

Programme is
0023C03B
2 AS with WBC
Programme is
0024C03B
3 AS with WBC
Programme is
0025C03B
4 AS with WBC

Qualification type = Welsh Baccalaureate
QW/WD = 03007212

Programme is
0013C03B
2 AS with WBC
Programme is
0015C03B
4 AS with WBC

Qualification type = GCSE A level
Skills challenge = 000007232

Programme is
0022A03B
3 AS
Programme is
0023A03B
3 AS
Programme is
0024A03B
4 AS

Qualification type = GCSE AS level
Skills challenge = 000007242

Programme is
0013A03B
3 AS
Programme is
0014A03B
4 AS

Qualification type = SOMP (H1) or General Certificate of Secondary Education
Skills challenge = 000007252

Programme is
0003A02B
3 AS
Programme is
0004A02B
4 AS
Programme is
0005A02B
5 AS
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