



# A&T Back Office Handbook

last updated for the Autumn 2020 (3.73) release

Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
Apr 2021	n/a	<b>Edit Pan Details for Academic Year</b> has been updated to say <i>You can only edit PAN data for future academic years.</i> See <a href="#">Edit PAN Details for an Academic Year</a> on page 229
Autumn 2020	3.73	Transfer Groups have an additional checkbox and date range to set the period(s) during which schools can download ATF files on the School Admissions Portal. This is applicable to Home LEAs only.  See <a href="#">Adding Basic Details (Phased)</a> on page 83. See <a href="#">Adding Basic Details (In Year)</a> on page 114.
Spring 2020	3.71	A new section has been added to the Sub Groups tab to allow users to select which offer statuses are displayed in the School Admissions Portal when viewing applications.  See <a href="#">Application Statuses Displayed to Schools</a> on page 90
Autumn 2019	3.70	The ATF files can now be downloaded from the School Admissions Portal. This can be enabled by setting a new permission.  See the School Admissions Portal handbook for more information.  If a student's current school was not selected from the National Database list but was free-typed then a new base record is not created. The name of the school is displayed in the <b>Application Current School</b> field in the student's <b>Application Details</b> tab.  A school history record is not created.  See <a href="#">Adding New Unmatched Students Manually</a> on page 122

<p><b>Summer 2019</b></p>	<p><b>3.69</b></p>	<p>The format of the Student Address tab has been changed for the Matched with Conflicts screen for Incoming Students. See <a href="#">Resolving Incoming Student Address Conflicts</a> on page 124.</p> <hr/> <p>Document updated to make it more relevant to current releases.</p> <p>The following reference guides have been merged into this handbook:</p> <ul style="list-style-type: none"> <li>Adding a new academic year</li> <li>Importing Online Applications</li> <li>Linked Reports</li> <li>Oversubscription Criteria</li> <li>Process Flowchart - Primary</li> <li>Process Flowchart - Secondary</li> <li>Process Periods and Vacancies</li> <li>Publishing offer info online</li> <li>Recording applicant response</li> <li>Removed applications</li> <li>Setting up at online</li> <li>Tests</li> <li>Transfer Group E-App Settings</li> <li>Transfer Group Set Up In Year</li> <li>Transfer Group Set Up Phased</li> <li>Transfer Group Sub Groups</li> </ul> <hr/> <p>The <b>Status of Application</b> is displayed on the data processing screens. This will reduce the number of records that are discarded in error.</p> <p>See <a href="#">Matching Incoming Unmatched Students</a> on page 121.</p> <p>See <a href="#">Adding New Unmatched Students Manually</a> <a href="#">Adding New Unmatched Students Manually</a> on page 122</p> <p>See <a href="#">Discarding Incoming Unmatched Students</a> on page 123.</p> <p>See <a href="#">Resolving Incoming Student Address Conflicts</a> on page 124.</p>
<p><b>Spring 2019</b></p>	<p><b>3.68</b></p>	<p>A new Hide in School Admissions Portal checkbox has been added to Sub Group Details to determine which applications are displayed in School Admissions Portal See <a href="#">Adding a New Sub Group</a> on page 87.</p> <hr/> <p>Edit Ranks now has additional functionality. Ticking the checkbox determines which preference reasons are displayed in School Admissions Portal i.e. LA or Applicant. See <a href="#">Adding a New Sub Group</a> on page 87.</p>

		<p>It is now possible to view a student's application in the current tab or a new tab.</p> <p>See <a href="#">Viewing Full Application Details</a> on page 128</p>
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## Northern Ireland Only

Date	Release	Description
<b>Spring 2019</b>	<b>3.68</b>	<p>A couple of items are included in this handbook which are for Northern Ireland (EANI) users only:</p> <p>See <a href="#">Initialise Preferences Routine (Northern Ireland Only)</a> on page 136.</p> <p>See <a href="#">Refusing and Moving Preferences (Northern Ireland only)</a> on page 217.</p>

# 02 | A&T Back Office

## Overview

Admissions and Transfers Back Office provides an online self-service portal for all school application across an authority. One A&T simplifies the entire process, empowering parents and carers by giving them access to what they need.

Because the portal accessed by families and the back office elements of One Admissions & Transfers are fully integrated, there is no need for local authority admissions teams to manually add application, streamlining the management of admissions.

This handbook will help you with the following processes:

- Managing applications
- Managing students
- Managing transfer groups
- Managing the A&T process
- Making offers
- Managing bases
- Managing reports
- Administration

## 03 | Managing Applications

The **Applications** page of A&T Back Office enables you to view past applications, view and edit current applications, add new applications manually and manage student details.

All functions on the **Applications** page are dependent on your user rights, as defined in the One v4 Client via **Tools | Permissions | User Group Processes**. For more information on defining user rights, see the *Managing Permissions* chapter of the *System Managing Users, Groups & Permissions* handbook, available from [One Publications](#) and [My Account](#).

### Selecting an Application

A&T applications can be selected using the **Students | Applications** and **Students | All Students** pages. Once you have selected an application, One displays the **Application Details** and **Student History** tabs in the right-hand panel. Depending on the stage of the application, the **Appeals**, **Application History** and **Preference History** tabs might also be displayed.

#### Via Students | Applications

1. Select **Students | Applications** to display search fields relating to applications.

2. If required, enter a **Student Name**. The drop-down menu to the left of the **Student Name** field enables you select different types of name search:
  - **Begins With** - Enter the first few characters of a **Surname**, **First Name** or **Middle Name**.
  - **Contains** - Enter a few characters from anywhere in the string for the **Surname**, **First Name** or **Middle Name**.
  - **Name Sounds Like** - Returns students whose **Surname**, **First Name** or **Middle Name** sounds like that entered in the **Student Name** field.  
This search also takes misspellings into account. For example, a search for “Krabb” would also return students by the name of “Crabb” and “Crabbe”.
3. Enter further search criteria into the fields as required. To display further search options, select the **More Options** hyperlink.
4. If you selected an In Year transfer group from the **Transfer Group Code or Description** field and wish to search for current applications only, select the **Current** check box.

## Managing Applications

- Click the **Search** button to display a list of students who meet your criteria. If you click the **Search** button without entering any criteria, then One retrieves all applications for active students.

Applications

Transfer Group Code or Description (Optional)

Feeder school (Optional)

Begins with

DOB: (dd/mm/yyyy)

Student Name

Student ID

Postcode

Active Students Only

[More Options](#) [Search](#)

[Clear Search](#)

QBE Limit of 200 reached. First 200 students returned matching "All, All LAs, Active Students".

[Print](#)

Student Name	Postcode	NCY
Aaron, (M) 01/09/2005	MK42	8
Aaron, (F) 01/09/2005	CB24	8

- Select the student whose applications you wish to view. The current application for that student is displayed in the **Application Details** tab, and a summary of student details and past applications is displayed at the top of the right-hand panel.

If you have suitable access rights, a link to the full student details is displayed. You can use this link to change the displayed details or view additional information.

Current Applications [+ Add New Application](#)

SEC2006

Past Applications  
No past applications

Application Details | Student History | Appeals | Application History | Preference History

Wide View

Transfer Group: SEC2006 UID: 99905W58L4A043XQ Application Ref: 820-2006-09-K-000284

Feeder School: Abbey Middle School [Update Feeder](#)

Registered School: Queen Anne Secondary School

Admission Address: 4 Oak Road, BEDFORD, Simshire, MK42 0HJ [Choose a different Address](#)

[View Nearest Schools](#) [Transport Assessment](#) [Application UDF](#) Application Verified: No [Verify](#)

Application Evidence [Edit](#)

Preferences (1) [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status
1 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

[Calculate Catchments & Distances](#) [View Preferences On Map](#) [View Distance Calculation Error/Status Log](#)

- To view the student's past applications, click the hyperlinks under the **Past Applications** heading on the toolbar.

## Via Students | All Students

1. Select a student and ensure that the **Applications Summary** tab is selected. For more information on selecting students, see [Selecting a Student](#) on page 53.

Abboran 21/05/2002 | Male Alert More options...

[Edit Student Details](#)

Active: Yes Student ID: NCY (inc offset): 12 Home LA: 820-Bedfordshire 820  
 1 Current Applications A&T Memo: 0 Past Applications Funding LA: 202-Camden Online Incorrect Details:

Student History | Carers | Relocation | Public Care | Applications Summary | Student Basic Details | Special Needs | Student Additional

[Wide View](#)

**Current Applications** **Past Applications** [+ Add New Application](#)

**Transfer Group - SEC 2006**

2. Click on the hyperlink for the application that you wish to view. The selected application is displayed in the **Students | Applications | Application Details** tab.

## Unimported Applications

If the selected student has applications that have been either submitted or resubmitted but have not yet been imported, then a notification banner is displayed at the top of the **Application Details** panel.

Online application not yet imported

Transfer Group: INY2018 UID: 820 Application Ref: [820-2018-55-](#)

Registered School: Leagrave Junior School  
 Correspondence Address: [9 Einstein Blvd, Atlantis,](#)

[View Nearest Schools](#) [Transport Assessment](#) Application Verified: No [Verify](#)

[Application UDF](#)

Application Evidence [Edit](#)

If the student only has one non-imported application, then clicking on this notification opens that application's details in a dialog. If the student has more than one non-imported application, then clicking on the notification displays a dialog listing the applications.

Applicant's Name	Submitted Date	First Preference
Mr	5/17/2016 11:10:57 AM	John Bunyan Specialist Science School <a href="#">View Application</a>
Mr	5/12/2016 10:45:53 AM	John Bunyan Specialist Science School <a href="#">View Application</a>

[Close](#)

If required, use the **View Application** links to view full application details.

**NOTE:** One does not display a notification dialog for non-imported applications that are marked as 'not requiring import'.



## Adding an Application

1. Select a student from the **Students | Applications** page:
  - a. Select **Students | Applications** to display search fields relating to applications.

- b. Optionally, select the application's transfer group from the **Transfer Group Code or Description** field.
- c. Enter search criteria into the fields. To display further search options, select the **More Options** hyperlink.
- d. If you selected an In Year transfer group from the **Transfer Group Code or Description** field and wish to search for current applications only, select the **Current** check box.
- e. Click the **Search** button to display a list of students who meet your criteria.

Student Name	Postcode	NCY
Abboran, 21/05/2002	MK42 0HJ	12
Abidi, 01/09/2003	MK40 1PL	10

- f. Select the student whose applications you wish to view. The current application for that student is displayed in the **Application Details** tab.

Application Details	Student History	Appeals	Application History	Preference History
Transfer Group: INY2018		UID: 82018XTJ21M8OSJP		Application Ref: <a href="#">820-2018-55-K-000304</a>
Registered School: Leagrave Junior School				
Correspondence Address: <a href="#">9 Einstein Blvd, Atlantis, Pegasus Galaxy, AT10 1AT</a>				
<a href="#">View Nearest Schools</a>		<a href="#">Transport Assessment</a>	<a href="#">Application UDF</a>	Application Verified: No <a href="#">Verify</a>

- Click the **Add New Application** hyperlink to display the **Add New Application** dialog.

Current Applications	Past Applications	<a href="#">+ Add New Application</a> <a href="#">- Remove Application</a> <a href="#">Clone Application</a>
<a href="#">In Year - INY 2018</a>	No past applications	

**Add New Application**

Please select a Transfer Group for which a new application will be created.

[PR1 2019 - Primary](#)

[INY 2019 - In Year Transfers 2018/19 - In Year Transfer Group](#)

[Cancel](#)

- Select the transfer group to which you wish to add the application. Editable fields relating to application details are displayed. The fields displayed differ depending on whether you are selected a Normal Phased or In Year transfer group.

- If you selected a Normal Phased group, then the **Applicant Details** and **Additional Details** fields are displayed:
  - Fill out the fields in the **Applicant Details** section. For more information on editing applicant details, see [Editing Applicant Details](#) on page 38.

New Application Details	Student History	Appeals
<p><b>Applicant Details</b> <a href="#">+ Add</a></p> <p> <input type="text" value="Title"/> <input type="text" value="Forename"/> <input type="text" value="Middle Name"/> <input type="text" value="Surname"/> *                     <input type="text" value="Initials"/>                     Responsibility: <input type="checkbox"/> <input type="text" value="Relationship"/> *                 </p> <p> <input type="text" value="Home Phone"/> <input type="text" value="Work Phone"/> <input type="text" value="Mobile Phone"/> </p> <p><input type="text" value="Email Address"/></p> <p>Notify By: Email: <input type="checkbox"/> Text: <input type="checkbox"/> Online: <input type="checkbox"/> Letter: <input type="checkbox"/></p> <p> <input type="text" value="Select Applicant Address"/> *                     <a href="#">Find Address</a> <a href="#">Set address from student</a> </p> <p><a href="#">Clear Address</a></p> <p><input type="text" value="Alternative Contact Notes"/></p>		

**NOTE:** If you wish to add preferences before adding applicant details, click the **Cancel** hyperlink to close the **Applicant Details** section. However, if you enter any applicant details, you must then enter at least the applicant's **Surname**, **Relationship** and **Applicant Address** before you can save the record.

- Optionally, fill out the fields in the **Additional Details** section. For more information on the **Additional Details** section, see [Editing Additional Application Details](#) on page 20.

## Managing Applications

**Additional Details** Edit

Received Date: dd/mm/yyyy Entered Date: dd/mm/yyyy Time: hh:mm Moving Date: dd/mm/yyyy

Moving Address

Council Tax Reference Test Results

Crown Servant / Returning Service:  Address Verified:

Multiple Birth:  Pupil Premium:

- If you selected an In Year group, then the **In Year Details** fields are displayed.

Fill out the fields in this section. For more information on the **In Year Details** section, see [Editing In Year Details](#) on page 40.

**In Year Details** Edit

PEND - Pending \*

Application Reason Date Place Required: dd/mm/yyyy\*

Fair Access Panel:

In Year LA Memo: In Year Applicant Memo:

4. Click the **Save** button to create the application. You can now add preferences and reference numbers to the application as required.

## Cloning an Application

Cloning applications enables you to copy **Applicant Details, In Year Details, Additional Details, Preferences, Preference Reasons** and **Siblings** information from one student record to another. This function is generally used when a parent/carer fills out duplicate application forms for several children as part of a joint In Year application (because they have several children of similar age who they want to attend the same school).

You cannot clone an application to a student who already has an application with associated preferences for the selected transfer group. However, you can clone an application to a student who already has an application but no preferences. In this case, the cloned details are added to the student's pre-existing application and the **Application History** is updated.

**Clone Application** is only available for In Year applications.

To clone an application:

1. Select an In Year application. For more information on selecting applications, see [Selecting an Application](#) on page 7.

**Current Applications** **Past Applications** [Add New Application](#)

[In Year - INY 2018](#) No past applications [Remove Application](#)

[PR1 2019](#) [Clone Application](#)

2. Click the **Clone Application** hyperlink to display the **Select a Student** dialog.

3. Select a student from the dialog.
  - a. Enter search criteria into the relevant fields.
  - b. Click the **Search** button to display a list of students who match your criteria.
  - c. Highlight the student you wish to clone the application to.
4. Click the **Clone** button. A warning dialog is displayed.
5. Click **Yes** to clone the selected application to the selected student.

**NOTE:** You cannot clone a withdrawn application.

## List of Data Copied When an Application is Cloned

### Applicant Details

All **Applicant Details** are copied.

### In Year Details

The following **In Year Details** are not copied:

- **Application Status**
- **Application Entered Date**
- **Application Received Date**
- **Fair Access Panel check box value**
- **Fair Access Panel Reason**
- **Fair Access Panel Decision.**

All other **In Year Details** are copied, including memos. The **Application Status** for the new application is set to **Pending**.

### Additional Details

The **Test score** is not copied.

The following **Additional Details** are copied:

- **Council Tax Ref**
- **Crown Servant/Returning Service value**
- **Moving Date.**

### Preference Records

Preference records are copied across to the cloned application, except for any system generated preferences. As such, all copied preferences are parental preferences.

## Managing Applications

Also:

- The **Admissions Address** field is populated with the current correspondence address (if one exists).
- If a Home Local Authority has been recorded for the student, then an **Application Reference** is generated.

### Sibling Information

All **Sibling** records linked to the original application are copied. If one of the siblings is the student to whom the cloned application is being added, then that student is not added as a sibling. One compares the forename, surname, date of birth and gender of the two students. If all match, then the sibling record is not copied.

### Preference Related Information

The following preference related information is not copied:

- **Offer status**
- **Distance**
- **Public Care**
- **Care Authority**
- **Catchment**
- **Address Verified**
- **Applicant Response**
- **Supporting Text**
- **Online.**

The following preference related information is copied:

- **All applicant and Local Authority reasons not mentioned in the previous list**
- **Specialist Schools**
- **Preference Memo**
- **Other Details Memo**
- **Special Reasons Memos.**

### Other fields completed during the Clone process

The following fields are also completed during the Clone process. These fields are not updated if the student already had an application for the selected transfer group but no preferences, as it would not have been necessary to create a new application for them in this case.

- **Feeder School:** this is the feeder base of the student for whom the application is being created.
- **Application Entered:** the date and time that the cloned application was added.
- **UID:** the unique application reference is created for the new application as the student is added to the transfer group.

## Editing Application Details

You can use the options in the **Students | Applications | Application Details** tab to edit the details of the selected application. Some of the tab's options are displayed on the summary panel, while some have their own expandable sections.

## Managing Application References

Applications can have two types of reference number: Home Local Authority (HLA) generated numbers and Other Local Authority (OLA) generated numbers. Applications can only have one HLA-generated number, but can have multiple OLA-generated numbers. An application reference is created automatically when an applicant's preference (i.e. a preference that is not a system-generated preference) is added to One.

Application references take the format **LAN-YYYY-MM-N-999999**, where:

- **LAN = Local Authority Number** - The Local Authority number for the authority that is receiving the application. For secondary applications (NCY 7 and above) this is the student's home LA, while for primary applications (NCY 6 and below) it is the LA that maintains the school.
- **YYYY = Year** - The academic year of entry.
- **MM = Month** - For Normal Phased admissions this is the usual month of entry for that academic year (e.g. 09 for September entries). For In Year transfer groups this is the month in which the application was entered, plus 50. The addition of the number 50 is specified by the DfE as a method of distinguishing In Year applications from Normal Phased admissions).

For example, if the **Application Entered** date was 01/02/2015 then the month component would be 02 + 50 = 52. If the **Application Entered** date was 10/11/2015 then the month component would be 11+50 = 61.

- **N = Method** – Indicates the origin of the application reference. Can be set to **E** (Online), **K** (Keyboard), or **B** (Batch). In year transfer group application reference numbers can be generated by manually adding preferences, by carrying over applications as part of the **In Year Student Selection** routine or by exporting an ATF file. In each case, the method of entry component is **K**.
- **999999 = Serial** - A unique serial number. You cannot edit this field if you enter your own Local Authority's LA number when adding a HLA-generated reference. In this circumstance, a serial number is automatically generated when the reference is saved.

## Adding a New Application Reference

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

Application Details	Student History	Appeals	Application History	Preference History
<b>Transfer Group:</b> INY2018		<b>UID:</b> 82018XTJ21M8OSJP		<b>Application Ref:</b> 820-2018-55-K-000304
<b>Registered School:</b> Leagrave Junior School				
<b>Correspondence Address:</b> <a href="#">9 Einstein Blvd, Atlantis, Pegasus Galaxy, AT10 1AT</a>				
<a href="#">View Nearest Schools</a> <a href="#">Transport Assessment</a>		<b>Application Verified:</b> No <a href="#">Verify</a>		
				<b>Application Evidence</b> <a href="#">Edit</a>

2. Click the **Application Ref** hyperlink to display the **Manage Application Reference** dialog.

3. Click the **Add Application Reference** hyperlink to display editable fields relating to application references.

4. Use the radio buttons to select whether the reference is to be a **Home LA** or **Other LA** reference. If the application already has an HLA-generated reference, then the **Home LA** option is greyed out.
5. Enter the **LA**, **Year**, **Month**, **Method** and **Serial** details of the reference.

**NOTE:** Application references must be unique within the transfer year. You cannot save a duplicate reference number.

6. Enter the **Date Known** for the reference.
7. Click the **Save** button to save the reference.

**Editing an Existing Application Reference:**

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.
2. Click the **Application Ref** hyperlink to display the **Manage Application Reference** dialog.
3. Click the **Edit** link for the reference you wish to edit to display editable fields relating to that reference.

4. Make your edits and then click the **Save** button.

**NOTE:** You can delete OLA reference numbers by clicking the **Delete** hyperlink. However, you cannot delete HLA reference numbers.

## Updating an Application's Feeder School

If a student's current base changes after the **Student Selection** process has been run, but before allocation, then the student's feeder base is not automatically updated. This ensures that the student retains their position within the transfer group.

However, the student's new registered base might not be a feeder for their transfer group, thereby creating an incorrect allocation. The **Update Feeder** function enables you to correct this issue by updating the student's current base.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

<b>Transfer Group:</b> SEC2006 <b>UID:</b> 99905W58L4AO43XQ <b>Application Ref:</b> 820-2006-09-K-000284 <b>Feeder School:</b> Abbey Middle School <a href="#">Update Feeder</a> <b>Registered School:</b> Queen Anne Secondary School <b>Admission Address:</b> <a href="#">4 Oak Road, BEDFORD, Simshire, MK42 0HJ</a> <a href="#">Choose a different Address</a> <a href="#">View Nearest Schools</a> <b>Application Verified:</b> No <a href="#">Transport Assessment</a> <a href="#">Application UDF</a> <a href="#">Verify</a>	<b>Application Evidence</b> <a href="#">Edit</a> <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
--	--

2. Click the **Update Feeder** hyperlink. A warning dialog is displayed.
3. Click the **Yes** button to update the application's feeder school.

## Changing an Application's Admission Address

The admission address is the address at which a student will be living when they attend their new school, and hence the address upon which eligibility calculations are usually based. However, there are some circumstances in which the admissions address is not used as the basis for calculation, for example in the case of returning Service or Crown Servant personnel. Admissions addresses are added to One when an application's first parental preference is added, but can be changed if necessary.

You can choose whether to run the A&T processes on the basis of current correspondence address or admissions address for each transfer group by selecting the **Use Admissions Address** check box on **Process | Transfer Groups | Basic Details**.

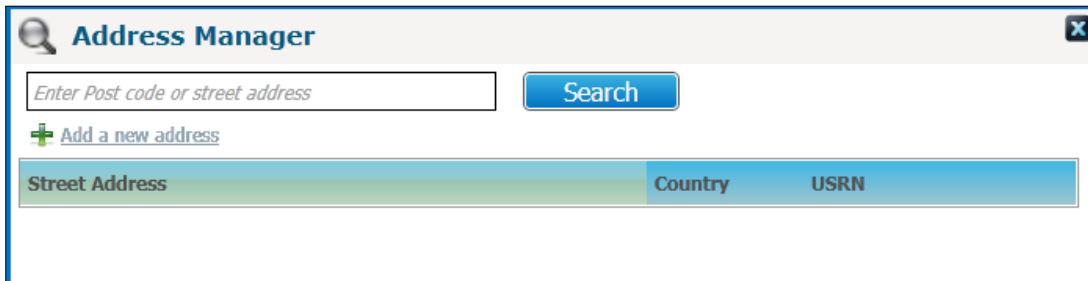
1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

<b>Transfer Group:</b> SEC2006 <b>UID:</b> 99905W58L4AO43XQ <b>Application Ref:</b> 820-2006-09-K-000284 <b>Feeder School:</b> Abbey Middle School <a href="#">Update Feeder</a> <b>Registered School:</b> Queen Anne Secondary School <b>Admission Address:</b> <a href="#">4 Oak Road, BEDFORD, Simshire, MK42 0HJ</a> <a href="#">Choose a different Address</a> <a href="#">View Nearest Schools</a> <b>Application Verified:</b> No <a href="#">Transport Assessment</a> <a href="#">Application UDF</a> <a href="#">Verify</a>	<b>Application Evidence</b> <a href="#">Edit</a> <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
--	--

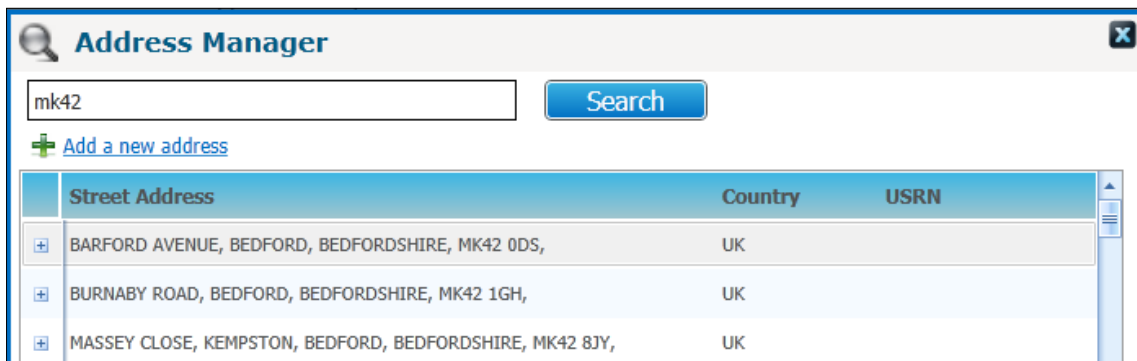


## Managing Applications

- Click the **Choose a different Address** hyperlink (located next to the **Admission Address** field) to display the **Address Manager** dialog.

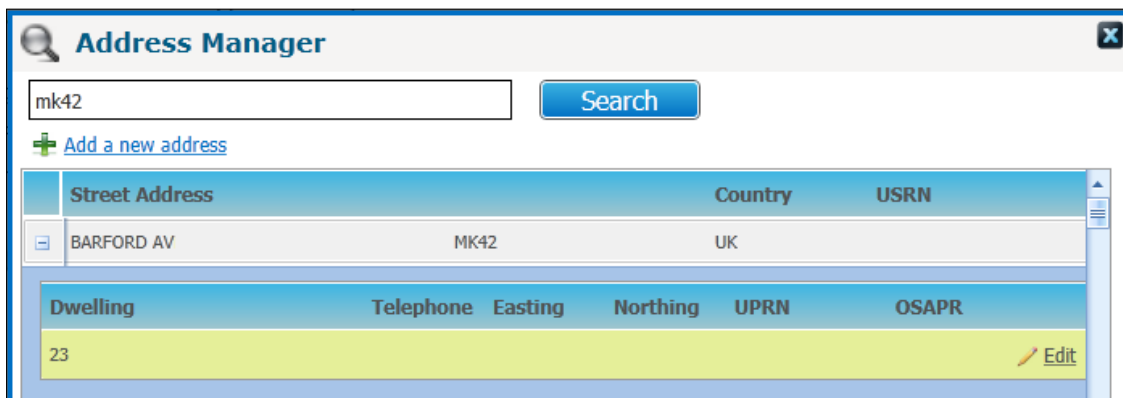


- Search for and select an address from the **Address Manager** dialog:
  - Enter at least two characters of a postcode or street address into the search field at the top of the dialog.
  - Click the **Search** button to display a list of the streets that match your search criteria.



	Street Address	Country	USRN
+	BARFORD AVENUE, BEDFORD, BEDFORDSHIRE, MK42 0DS,	UK	
+	BURNABY ROAD, BEDFORD, BEDFORDSHIRE, MK42 1GH,	UK	
+	MASSEY CLOSE, KEMPSTON, BEDFORD, BEDFORDSHIRE, MK42 8JY,	UK	

- Click the plus button on the desired street to view a list of dwellings on that street.



Street Address	Country	USRN
BARFORD AV	UK	MK42

Dwelling	Telephone	Easting	Northing	UPRN	OSAPR
23					Edit

- Highlight the desired dwelling and then click the **Select** button to select that address. A confirmation dialog is displayed.
- Click the **Yes** button to update the student's admission address.

**NOTE:** If the applicant's admissions and correspondence addresses are different, you can make the current correspondence address the admissions address by clicking the **Copy to Admission Address** hyperlink, located next to the **Correspondence Address** field. This link is only available where the correspondence and admissions addresses are different.

## Viewing the Nearest Schools to an Application Address

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

**Transfer Group:** SEC2006 **UID:** 99905W58L4AO43XQ

**Feeder School:** Abbey Middle School [Update Feeder](#)

**Registered School:** Queen Anne Secondary School

**Admission Address:** [4 Oak Road, BEDFORD, Simshire, MK42 0HJ](#) [Choose a different Address](#)

[View Nearest Schools](#) [Transport Assessment](#) [Application UDF](#)

2. Click the **View Nearest Schools** hyperlink to display the **View Nearest Schools** dialog.

**View Nearest Schools**
✕

Abboran

4 Oak Road, 0HJ

[Centre on Map](#)

For NCY 7

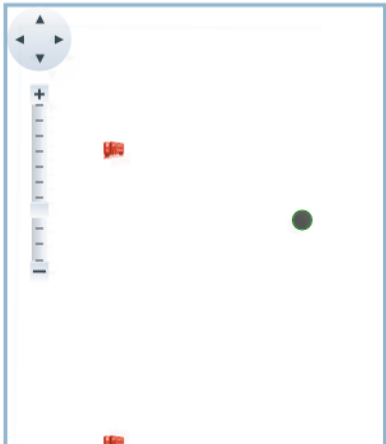
[More Options](#) **Search**

Show All

**Nearest Schools** School Catchments That Include Postcode (0)

Base Name	LA	Sch. No.	Direct Dist	Walk Dist (miles)	Drive Dist (miles)
<input checked="" type="checkbox"/> ANTBase23	820	0047	0.65	1.585	1.594
<input checked="" type="checkbox"/> ANTBase31	820	0055	0.65	1.585	1.594
<input checked="" type="checkbox"/> ANTBase27	820	0051	0.926	1.858	1.862
<input checked="" type="checkbox"/> Church End Lower School	999	2010	0.926	1.858	1.862
<input checked="" type="checkbox"/> ANTBase30	820	0054	0.926	1.858	1.862

[Expand Map](#) **Map Options**



3. Select the address you wish to use as a start point from the topmost drop-down menu. You can only select the admission or correspondence addresses for the selected application.
4. Select an NCY from the **For NCY** menu. Only schools catering to the selected NCY are displayed.
5. Optionally, configure search options:
  - a. Click the **More Options** hyperlink to display the **More Search Options** dialog.
  - b. Enter the number of schools you wish to view into the **Nearest Schools** field.
  - c. Select a measurement point for the schools from the **Select Nearest Schools using** menu.
  - d. Select a distance calculation method from the **Distance Calculation Method** menu.
  - e. Use the **Select Bases using** radio buttons to select whether you want to view **Home LA** bases, **Other LA** bases, or **All Bases**.
  - f. Select whether you want to view **All** bases or only **Active** bases from the **Base types** field.
6. Click the **Search** button to display a list of the nearest schools that match your search criteria. The locations of the schools are displayed on the map in the right-hand panel.

**NOTE:** To view a list of the schools whose catchments include the postcode you searched for, click the **School Catchments That Include Postcode** tab.

You can use the **Bases | Nearest School Search** page to view the nearest schools to any address (i.e. not just those addresses involved in a particular application). For more information on using this page, see [Viewing the Nearest Schools to an Address](#) on page 235.

## Verifying an Application

Verifying an application confirms that the application's details (e.g. the student's address and preference reasons) have been checked and confirmed. This is for information only and is not used by the offer processes.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

<b>Transfer Group:</b> INY2018	<b>UID:</b> 82018XTJ21M8OSJP	<b>Application Ref:</b> <a href="#">820-2018-55-K-000304</a>	<a href="#">Application Evidence</a>
<b>Registered School:</b> Leagrave Junior School			<a href="#">Edit</a>
<b>Correspondence Address:</b> <a href="#">9 Einstein Blvd, Atlantis, Pegasus Galaxy, AT10 1AT</a>			
<a href="#">View Nearest Schools</a>		<a href="#">Transport Assessment</a>	
<a href="#">Application UDF</a>		<b>Application Verified:</b> No	<input type="button" value="Verify"/>

2. Click the **Verify** hyperlink on the toolbar. A warning dialog is displayed.
3. Click the **Yes** button to verify the application.

**NOTE:** To unverify the application, click the **Mark as not verified** hyperlink, which appears on the toolbar after verification.

Manually-verified online applications revert to an unverified state (and therefore re-imported) if the applicant makes changes online. However, verification status is retained if changes are made to the application in A&T Back Office.

## Editing Additional Application Details

The **Additional Details** section enables you to add additional information about an application, such as the date that the application was received and the council tax reference of the application address.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.
2. Open the **Additional Details** section to display additional information fields relating to the application, and then click the **Edit** hyperlink to make those fields editable.

Application Details	Student History	Appeals	Application History	Preference History
<b>Additional Details</b> <a href="#">Edit</a>				
10/05/2019	10/05/2019	00:00		
Moving Date: dd/mm/yyyy	Moving Address			
Council Tax Reference	Test Results			
Crown Servant / Returning Service: <input type="checkbox"/>	Address Verified: <input type="checkbox"/>			
Multiple Birth: <input type="checkbox"/>	Pupil Premium: <input type="checkbox"/>			
				<input type="button" value="Cancel"/> <input type="button" value="Save"/>

3. Enter information as required. The available fields are:
  - **Received Date:** The date that the form was received. Mandatory for In Year applications but optional for Normal Phased applications.
  - **Entered Date:** The date that the form was entered. Mandatory for In Year applications but optional for Normal Phased applications. Completed automatically when an application is added via **Add New Application**, via an ADT file import from another LA or through the initial population of the In Year transfer group from the In Year Student Selection routine.
  - **Time:** The time that the form was entered. Mandatory for In Year applications but optional for Normal Phased applications. Completed automatically when an application is added via **Add New Application**, via an ADT file import from another LA or through the initial population of the In Year transfer group from the In Year Student Selection routine.
  - **Moving Date:** The date that the child is to move house (if applicable). A **Moving Date** without a **Moving Address** indicates that the child's family is moving on a particular date but that no special processing should take place.
  - **Moving Address:** The address that the child is to move to (if applicable).
  - **Council Tax Reference:** Optional, maximum 30 characters. The council tax reference of the child's address. Can be used as additional proof that the applicant's address has been verified and that the LA sending the admissions is the home LA for the student. Exported in both Normal Phased and In Year ADT files.

**NOTE:** The **Council Tax Reference** is independent of the **Verified** tag. The **Verified** tag indicates that the LA has checked and validated that a pupil lives at the address shown.. For more information on the **Verified** tag, see [Verifying an Application](#) on page 20.

  - **Test Results:** The student's overall test score. See [Processing Test Results](#) on page 110 for more information on how overall test scores are processed.

**NOTE:** This is a manually-entered field for information only and is not populated by the processes in **Process | Transfer Groups | Tests**.

  - **Crown Servant / Returning Service:** Denotes that the child is from a Crown Servant or Returning Service family. See [Managing Applications from Crown Servant/Returning Service Families](#) on page 21 for more information on dealing with Crown Servant and Returning Service applications.
  - **Address Verified:** Confirms to other Local Authorities or Other Admission Authority schools that the child's address has been verified.
  - **Multiple Birth:** Indicates that the child is a twin, triplet, etc. This information may be used when allocating places.
  - **Pupil Premium:** Indicates that the child is or has been eligible for Free School Meals.
4. Click the **Save** button to save your changes.

## Managing Applications from Crown Servant/Returning Service Families

Children who are from Crown Servant (diplomatic) or Returning Service families are treated as special cases by Local Authorities. For these children, the future address, rather than the current address, is used when processing applications.

To configure a Crown Servant/Returning Service application:

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

- Open the **Additional Details** section to display additional information fields relating to the application.

The screenshot shows a web form titled 'Additional Details' with an 'Edit' icon. It contains several input fields: a date field with '10/05/2019', a text field for 'Moving Date: dd/mm/yyyy', a text field for 'Moving Address', and a text field for 'Council Tax Reference'. There are also checkboxes for 'Crown Servant / Returning Service', 'Address Verified', 'Multiple Birth', and 'Pupil Premium'. A 'Test Results' button is located next to the Council Tax Reference field. At the bottom right, there are 'Cancel' and 'Save' buttons.

- Select the **Crown Servant / Retuning Service** check box.
- Enter a **Moving Date**. This is the date that the child will move house.
- Enter a **Moving Address**. This is the address that the child will move to, and the address that One uses for its catchment and distance calculations.

**NOTE:** This address should be verified before the application is processed. For more information on verifying applications, see [Verifying an Application](#) on page 20.

- Click the **Save** button to save your changes.

**NOTE:** The **Crown Servant / Retuning Service** check box is selected automatically when a Crown Servant / Retuning Service application is imported. This information is included in ADT exports.

## Viewing a One Transport Assessment

The **Assessment** hyperlink opens the One Transport Assessment screen in a separate tab. This hyperlink can be found on both the **Students | Applications | Application Details** and **Students | All Students** tabs. The selected student's assessment details are highlighted, enabling you to create new assessments for the student or view details of the student's existing assessments. The Transport Assessment link is only displayed if all the following conditions are met:

- The Local Authority has a One Transport v4 licence.
- You have at least read permission to the Transport Single Student Assessment process. You must have "create" permissions to the process to create new assessments.
- The Local Authority has configured the correct URL for Transport.

For more information on using the Assessment area of One Transport, see the *Performing Assessments* help topic of the *Transport Back Office* handbook, available on the [One Publications](#) website.

## Managing Application Preferences

Application preferences can be recorded in the following ways:

- Manual entry (via **Students | Applications | Application Details**).
- An applicant records a preference in A&T Online Public Access. The data from the preference is subsequently imported into the main One database via the **Process** area.
- An application is recorded in One Online via **My Schools | Admissions and Transfers | Preference Form**.

- An ADT file containing application information sent by other Local Authorities is imported.

Each of these methods causes an application reference to be generated.

Under normal circumstances applicant preferences have single-digit preference rank numbers (usually no more than 6).

Application preferences are managed via the **Preferences** section of the **Students | Applications | Application Details** tab. For each listed preference, One displays the number of **Siblings** the student has at the base, a **Late** indicator and the **Distance** from the student's address to the school. The **Offer Status** column might contain a flag assigned during processing, if applicable. If processing has not yet been carried out, then no offer status is displayed.

The **Preference** also indicates whether or not the **Appeals** check box has been selected for a particular preference.

## Adding Application Preferences Manually

You can manually add preferences to applications that do not yet have any associated preferences. To do so:

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

2. Click the **Add** hyperlink next to the **Preferences** header to display editable fields relating to preference details.

**NOTE:** The **Add** hyperlink is only displayed for applications that do not yet have any preferences assigned.

3. Select a receiver:
  - a. Click the **Receiver, LA or School No.** browse to display the **Select a Receiver** dialog.

## Managing Applications

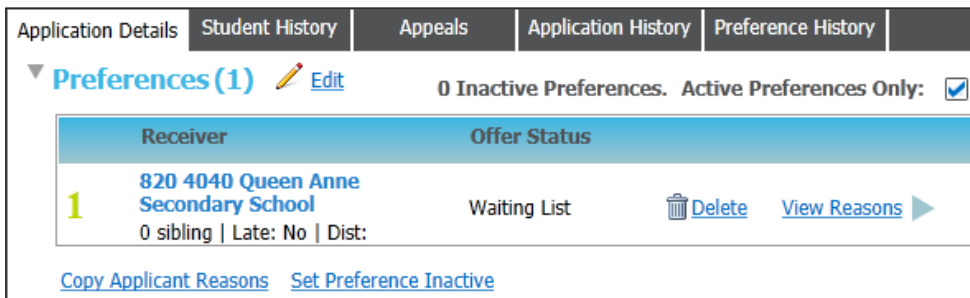
Receiver	LA	Sch. No.	Sub Group
Aylesbury Grammar School	825	4500	Out of County - Buckinghamshire
Denbigh High School	826	4038	Out of County - Milton Keynes
Elm Moor Infants	820	2334	Primary Community

- b. Optionally, enter search criteria to filter the list of receivers.
- c. Highlight a receiver and then click the **Select** button to select that receiver and close the dialog.
4. Optionally, select an offer status from the **Offer Status** drop-down menu.
5. Optionally, add preference reasons. For more information on adding preference reasons, see [Managing Preference Reasons](#) on page 27.
6. Click the **Save** button to add the preference.

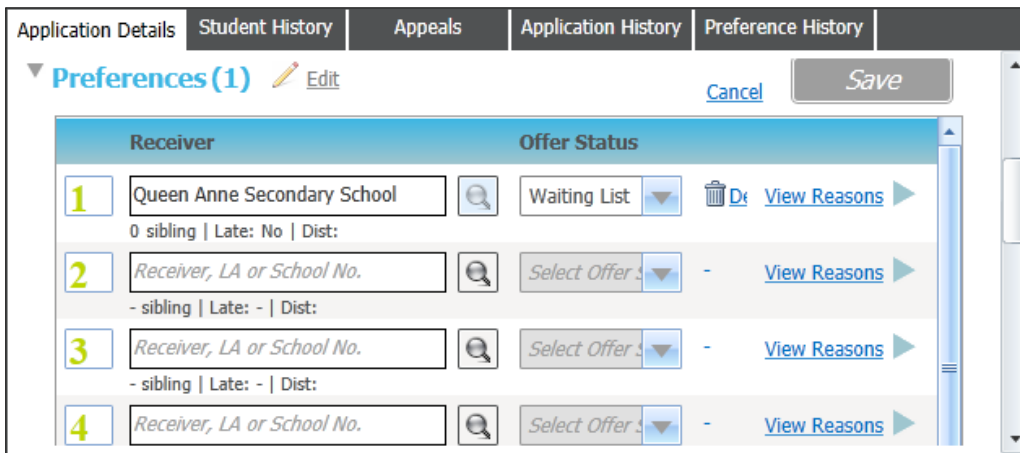
**NOTE:** If you need to manually add preference information provided by an Other Local Authority (OLA) on a paper form, record the preference information here and then add the OLA's application reference number. For more information on adding reference numbers, see [Managing Application References](#) on page 15.

## Editing Application Preferences

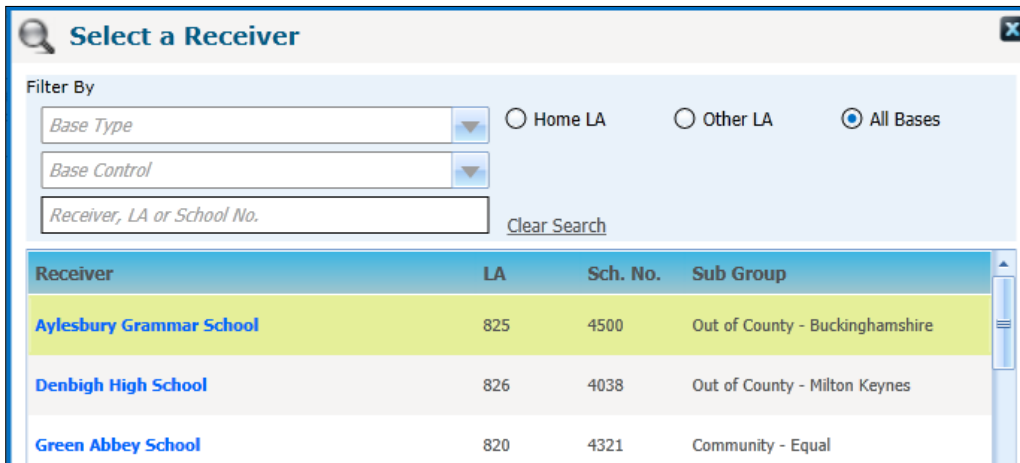
1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.



2. Click the **Edit** link next to the **Preferences** header to make the preferences list editable.



3. Click the browse button for the preference you wish to change to display the **Select a Receiver** dialog.



**NOTE:** To add a new preference, click the browse button for one of the blank preferences.

4. Highlight a receiver from the list in the dialog. You can use the search fields at the top of the dialog to filter the list if required.
5. Click the **Select** button to select the receiver and close the dialog.
6. Optionally, select an offer status from the **Offer** drop-down menu.



**NOTE:** Updating offer status can have wide-ranging implications for the student's application, depending on the point of the application process that the student is at and the transfer group that the student is in. For more information, see [Updating Offer Status](#) on page 212.

- Optionally, add reasons for the preference. See [Managing Preference Reasons](#) on page 27 for more information on adding preference reasons.
- Click **Save** to save the new preference.

## Marking Preferences as Inactive

In year application preferences can be made inactive. Inactive preferences are moved from the **Choices** table and can still be reported on, but are not included in the Make Offers process.

Making preferences inactive enables you to make a place offer while still maintaining a waiting list. If an applicant wants to stay on the waiting list for their first preference even though they have been offered a place at another school, you can make the offered school inactive. The school from the inactive preference is not included in the Make Offers process, but can still be reported on. The first preference remains active and is considered in the next Make Offers process.

Inactive preferences cannot be re-activated. However, the same school can be added in again as a preference if needed.

- Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

The screenshot shows the 'Application Details' tab with a table of preferences. The table has columns for 'Receiver' and 'Offer Status'. One preference is listed for '820 4040 Queen Anne Secondary School' with a 'Waiting List' status. Below the table, there are links for 'Copy Applicant Reasons' and 'Set Preference Inactive', which is highlighted with a red box.

Receiver	Offer Status
1 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

- Click the **Set Preference Inactive** hyperlink to display the **Inactive Preference Details** dialog.

The screenshot shows the 'Inactive Preference Details' dialog box. It contains a warning message: 'Please enter the information below to set a preference record as inactive. This process cannot be undone once the details have been saved.' Below this is a table with columns for 'Receiver', 'Offer Status', and 'Inactive'. The 'Inactive' column has a checkbox. Below the table are fields for 'Inactive Date: (dd/mm/yyyy)' and 'Inactive Reason'. At the bottom right, there are 'Close' and 'Save' buttons.

Receiver	Offer Status	Inactive
1 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List	<input type="checkbox"/>

Inactive Date: (dd/mm/yyyy)

Inactive Reason

[Close](#) [Save](#)

- Select the preference(s) that you wish to make inactive using the check boxes.
- Enter an **Inactive Date**. This is the date that the preference became inactive.
- Optionally, select an **Inactive Reason**.
- Click the **Save** button to make the preference inactive.

## Managing Preference Reasons

When applying for a school place (either online or on a paper form), applicants can express one or more reasons (with supporting information where appropriate), to explain why they would prefer their child to go to a particular school. These reasons must be validated and quantified and are used in conjunction with additional information from the LA to rank students as part of the offer process.

As well as being edited manually, Applicant Reasons can also be populated via the ADT import process. LA Reasons are not populated in this way.

## Editing Applicant Reasons

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

Application Details | Student History | Appeals | Application History | Preference History

▼ Preferences (1) [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status
<b>1</b> 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

2. Within the **Preferences** section, click a preference's **View Reasons** hyperlink to view two lists of preference reasons: one denoting the reasons given by the applicant and one denoting the LA's reasons for the preference.

**NOTE:** Only preference reasons that have been selected are initially displayed. Click the expand arrow to view the full list of reasons.

Application Details | Student History | Appeals | Application History | Preference History

◀ Preference Reasons [Edit](#) [Copy Applicant Reasons](#) [Previous](#) [Next](#) [Preference UDF](#)

2 820 4040 Queen Anne Secondary School

Reasons	Applicant's	LA
Named School	✓	✗
Catchment	✓	✓
Distance	✓	✗
Feeder Link	✓	✓
Ease of Travel	✗	✓

**LA Only** ⏏

Status: Waiting List

Test Results: -

Online: No

Appeals: No

Deferred: No

Exceptional: No

From Waiting List: No

Do not consider for mainstream: No

Preference Memo:

Other Details Memo:

3. Click the **Edit** hyperlink to view editable fields related to preference reasons.

4. Select the reasons given by the applicant from the **Applicant's** column.
5. Click the **Save** button to save your changes.

**NOTE:** For more information on the meaning of each individual preference reason, see the Preference Reason Descriptions appendix.

## Editing LA Reasons

LA reasons are validated preference reasons that are used by the Make Offers process to rank students at their preferred bases. These reasons can either be entered manually or copied from the applicant reasons.

### Editing LA Reasons Manually

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

2. Within the **Preferences** section, click a preference's **View Reasons** hyperlink to view two lists of preference reasons: one denoting the reasons given by the applicant and one denoting the LA's reasons for the preference.

**NOTE:** Only preference reasons that have been selected are initially displayed. Click the expand arrow to view the full list of reasons.

Application Details Student History Appeals Application History Preference History

Preference Reasons [Edit](#) [Copy Applicant Reasons](#) [Previous](#) [Next](#) [Preference UDF](#)

2 820 4040 Queen Anne Secondary School

Reasons	Applicant's	LA
Named School	✓	✗
Catchment	✓	✓
Distance	✓	✗
Feeder Link	✓	✓
Ease of Travel	✗	✓

**LA Only**

Status: Waiting List  
 Test Results: -  
 Online: No  
 Appeals: No  
 Deferred: No  
 Exceptional: No  
 From Waiting List: No  
 Do not consider for mainstream: No  
 Preference Memo:   
 Other Details Memo:

3. Click the **Edit** hyperlink to view editable fields related to preference reasons.

2 820 4040 Queen Anne Secondary School

Reasons	Applicant's	LA
Named School	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Public Care	<input type="text" value="Code or Description"/>	<input type="text" value="Code or Description"/>
Sibling	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Catchment	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Distance	<input checked="" type="checkbox"/>	<input type="text" value="Distance"/>
Feeder Link	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Social	<input type="checkbox"/>	<input type="checkbox"/>
Medical	<input type="checkbox"/>	<input type="checkbox"/>
Social / Medical		<input type="checkbox"/>
Religion	<input type="checkbox"/> <input type="text" value="Code or Description"/>	<input type="checkbox"/> <input type="text" value="Code or Description"/>

**LA Only**

Status: Waiting List  
 Test Results: -  
 Online: No  
 Appeals:   
 Deferred:   
 Exceptional:   
 From Waiting List: No  
 Do not consider for mainstream:

4. Select the required reasons from the **LA** column.

5. Click the **Save** button to save your changes.

### Copying Applicant Reasons

The Copy Applicant Reasons function copies most of the entries in the **Applicant Reasons** section of **Preference Reasons** into the **LA Reasons** section for the selected receivers. All applicant reasons that have an entry are copied except for:

- Catchment
- Feeder Link
- Special Reasons 1, 2 and 3 (and their Weighting)
- Memos.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

## Managing Applications

Application Details | Student History | Appeals | Application History | Preference History

▼ **Preferences (1)** [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status
<b>1</b> <b>820 4040 Queen Anne Secondary School</b> 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

2. Within the **Preferences** section, click a preference's **View Reasons** hyperlink to view two lists of preference reasons: one denoting the reasons given by the applicant and one denoting the LA's reasons for the preference.

**NOTE:** Only preference reasons that have been selected are initially displayed. Click the expand arrow to view the full list of reasons.

Application Details | Student History | Appeals | Application History | Preference History

◀ **Preference Reasons** [Edit](#) [Copy Applicant Reasons](#) [Previous](#) [Next](#) [Preference UDF](#)

▶ **2 820 4040 Queen Anne Secondary School**

Reasons	Applicant's	LA
Named School	✓	✗
Catchment	✓	✓
Distance	✓	✗
Feeder Link	✓	✓
Ease of Travel	✗	✓

**LA Only**

Status: Waiting List

Test Results: -

Online: No

Appeals: No

Deferred: No

Exceptional: No

From Waiting List: No

Do not consider for mainstream: No

Preference Memo:

Other Details Memo:

3. Click the **Edit** hyperlink to view editable fields related to preference reasons.
4. Click the **Copy Applicant Reasons** hyperlink to display the **Copy Applicant Reasons** dialog.

**Copy Applicant Reasons**

Pref No	Receiver	Offer Status	Copy
<b>1</b>	Gravenhurst Academy	Offer	<input type="checkbox"/>
<b>2</b>	Queen Anne Secondary School	Waiting List	<input type="checkbox"/>

5. Select each preference that you wish to copy applicant reasons for and then click the **Copy** button. A confirmation dialog is displayed.
6. Click the **Continue** button to copy the applicant's preference reasons to the **LA** column.
7. Click the **Save** button to save your changes.

**NOTE:** You can bulk-copy applicant reasons for an entire transfer group using the Copy Applicant Reasons routine. For more information on this routine, see [Running the Copy Applicant Reasons Process](#) on page 154.

## Populating Sibling

**Current/Edit Siblings** now records the Unique Reference Number (URN) of the Linked School for Siblings details.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

Receiver	Offer Status
<b>1</b> 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

2. Within the **Preferences** section, click a preference's **View Reasons** hyperlink to view two lists of preference reasons: one denoting the reasons given by the applicant and one denoting the LA's reasons for the preference.

**NOTE:** Only preference reasons that have been selected are initially displayed. Click the expand arrow to view the full list of reasons.

Reasons	Applicant's	LA
Named School	✓	✗
Sibling	✓ - 1 <a href="#">View</a>	✗
Catchment	✓	✓
Distance	✓	✗
Feeder Link	✓	✓
Ease of Travel	✗	✓

3. If a Sibling record exists, click the **View** hyperlink to display the **Current Sibling** dialog.

**Preference 2 820 4040 Queen Anne Secondary School**  
 Siblings for John Sheppard (M) - 10/05/2010

**Current Siblings**

- ▶ **Shepherd, Florence (F) - 05/11/2011 - NCY: 2 - Linked School: 820 - 2001 - Waters Edge Primary School (p4mt) (Populated from ONE)** [Edit](#)

4. Alternatively, click the **Edit** hyperlink to view editable fields related to preference reasons.
5. Select the **Sibling** checkbox and click the magnifying glass to display the **Current Sibling** dialog.
6. Click the **Add New Sibling** to add a new record or **Edit** to edit an existing record.

**Preference 2 820 4040 Queen Anne Secondary School**  
Siblings for John Sheppard (M) - 10/05/2010

**Edit Sibling**

Populate Sibling from ONE  Manually populate sibling

Begins with  Name or Unique Pupil No.

DOB: (dd/mm/yyyy)  8904534  Postcode

Active Students Only

[More Options](#) [Clear Search](#)

1 Students matching "8904534, All LAs, Active Students"

[Print](#)

Student Name	Postcode	NCY
Shepherd, Danielle (F) 12/03/2014	Z1 2CB	0

**Selection Details**

First Name: Danielle Surname: Shepherd Female  
Middle Name: Harriet D.O.B: 12/03/2014  
Address: 11 High View, Foxton, Alphaton, Simshire, Z...  
NCY: 0 Linked School:  LA No -  School -  URN

**Preference 1 (820) - 4401 Applegreen School**  
Siblings for Chris Aaron (M) - 01/09/2005

**Current Siblings**

**Add New Sibling**

Populate Sibling from ONE  Manually populate sibling

Forename  Midname  Surname

DOB   Female  Male

**Linked School**

LA No  School No  URN

## Adding a Student to a Band

The band details displayed in the **Band Details** section vary depending on whether the selected application is for a school in the Home Local Authority (including an Other Admissions Authority within the Home Authority). If the application is for an HLA school, then ASL band details are displayed. If the application has been received from a Local Authority that is not the Home Authority, then ALT band details are displayed.

You can use the **Application Details | Preference Reasons | Band Details** section to assign individual students to bands within the schools they have applied to. You can also use **Assign Students to Band** in **Bases | Receivers | Preferences** to add band applications to student records either individually or in bulk.

For information about setting up banding at a base or group of bases, see [Adding Bands to an NCY](#) on page 232.

**NOTE:** You cannot edit **Band Details** information once the Make Offers routine has been run.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

Application Details | Student History | Appeals | Application History | Preference History

▼ Preferences (1) [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status
<b>1</b> 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

- Within the **Preferences** section, click a preference’s **View Reasons** hyperlink to view the reasons for that preference.

Application Details | Student History | Appeals | Application History | Preference History

▼ Preference Reasons [Edit](#) [Copy Applicant Reasons](#) [Previous](#) [Next](#) [Preference UDF](#)

▼ **1** 820 0011 ANTBase01

Reasons	Applicant's	LA
Named School	×	×
Public Care	×	×
Sibling	×	×
Catchment	×	×

**Banded School**  
[View Band Details](#)

**LA Only**

Status: Offer  
Test Results: -

- Scroll down to the **Band Details** section and click the **Add Band** hyperlink:
  - If the application you selected is for a school in the Home Local Authority (including an Other Admissions Authority within the Home Authority), the **New Band Record** field is displayed. Select the band you wish to add from the drop-down menu.

**Band Details**

[+ Add Band](#)

**New Band Record**

▼

**NOTE:** Only **Discrete**, **Ability** and **Aptitude** bands can be selected here; students are associated with **Fair** bands during the Make Offers process.

- If the application you selected has been received from a Local Authority that is not the Home Authority, editable fields relating to band details are displayed. Enter an **ALT Band Name**, **ALT Rank** and **ALT Offer Status** as required.

**Band Details**

**New Band Record**

▼

[Cancel](#) [Save](#)

- Click the **Save** button to add the student to the band.



## Editing a Student's Band Details

**NOTE:** You cannot edit **Band Details** information once the **Make Offers** routine has been run.

### Editing Bands for Home Local Authority Applications (ASL Band Details)

If the Admissions Authority for the application is an Other Admission Authority (OAA) within the Home Authority (i.e. the school is their own admission authority), the Band Details fields are completed when the ASL file is imported. If the OAA is not using the ASL XML file, or if you need to edit these details prior to the offer being processed, these fields can also be completed manually.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, [Selecting an Application](#) on page 7.

Application Details | Student History | Appeals | Application History | Preference History

▼ Preferences (1) [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status	
1 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List	<a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

2. Within the **Preferences** section, click a preference's **View Reasons** hyperlink to display the reasons given for that preference.

Application Details | Student History | Appeals | Application History | Preference History

▼ Preference Reasons [Edit](#) [Copy Applicant Reasons](#) [Previous](#) [Next](#) [Preference UDF](#)

▼ 1 820 0011 ANTBase01

Reasons	Applicant's	LA
Named School	×	×
Public Care	×	×
Sibling	×	×
Catchment	×	×

**Banded School**  
[View Band Details](#)

**LA Only**

Status: Offer  
Test Results: -

3. Scroll down to the **Band Details** section and click a band's **Edit** hyperlink to display editable fields relating to the student's presence in that band.

**Band Details**

▼ band1 Offer Rank: - Offer Status: Not Processed [Edit](#)

ASL Details

Priority Group Number:  Priority Group Criterion:

ASL Rank:  Ranked By:

[Delete](#) [Cancel](#) [Save](#)

4. If the student is in a priority group, enter their **Priority Group Number** and **Criterion**.
5. If the student is in a ranked group, enter their **ASL Rank** and completed the **Ranked By** field.

**NOTE:** The offer rank and status are automatically entered when the **Make Offers** routine is run. All band details become view-only at this point. The offer rank and status are updated as they change through the allocation process.

- Click the **Save** button to save your changes.

### Editing Bands for Other Local Authority Applications (ALT Band Details)

- Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

Application Details | Student History | Appeals | Application History | Preference History

▼ **Preferences (1)** [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status
1 820 4040 Queen Anne Secondary School 0 sibling   Late: No   Dist:	Waiting List <a href="#">Delete</a> <a href="#">View Reasons</a>

[Copy Applicant Reasons](#) [Set Preference Inactive](#)

- Open the **Preferences** section to display a list of the application's current preferences.

Application Details | Student History | Appeals | Application History | Preference History

▼ **Preference Reasons** [Edit](#) [Copy Applicant Reasons](#) [Previous](#) [Next](#) [Preference UDF](#)

▼ 1 820 0011 ANTBase01

Reasons	Applicant's	LA
Named School	X	X
Public Care	X	X
Sibling	X	X
Catchment	X	X

**Banded School**  
[View Band Details](#)

**LA Only**   
Status: Offer  
Test Results: -

- Scroll down to the **Band Details** section and click a band's **Edit** hyperlink to display editable fields relating to the student's presence in that band.

**Band Details**

▼    [Edit](#)

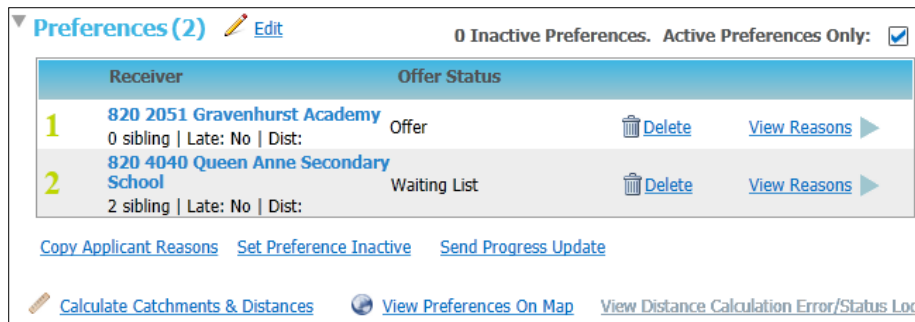
[Delete](#) [Cancel](#) [Save](#)

- Enter an **ALT Band Name**, **ALT Rank** and **ALT Offer Status** as required.
- Click the **Save** button to save your changes.

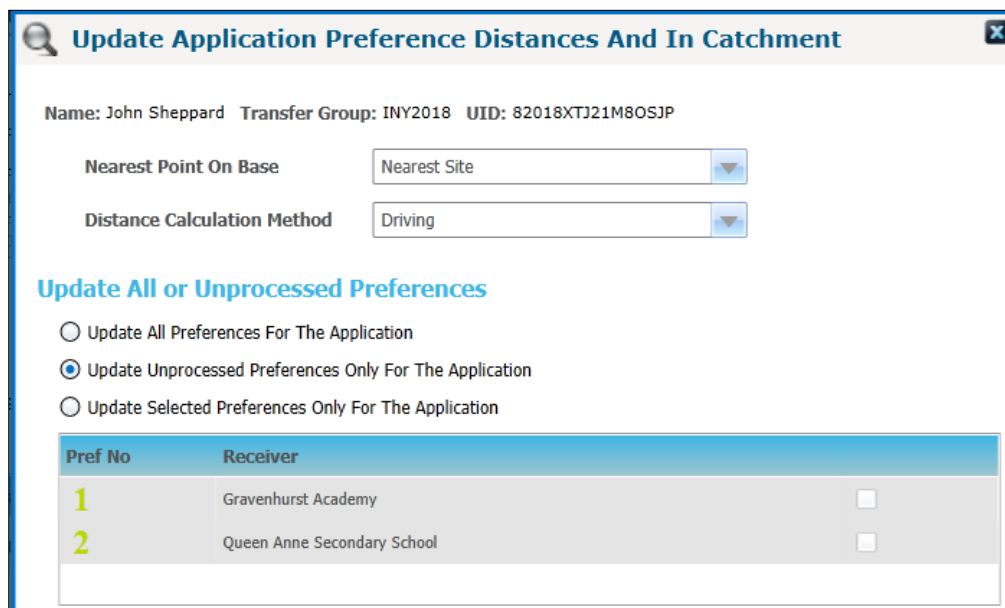
### Updating Application Preference Catchments and Distances

The **Calculate Catchments & Distances** function enables you to calculate the distance from a child's address to a particular preference, thereby confirming whether the child's address lies within the school's catchment area.

- Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.



- Click the **Calculate Catchments & Distances** hyperlink to open the **Update Application Preference Distances And In Catchment** dialog.



- Select the point of the base that you wish to measure to from the **Nearest Point On Base** drop-down menu.
- Select a **Distance Calculation Method**.
- Select an option from the **Update All or Unprocessed Preferences** menu.
- Click the **Update** button to confirm your changes and update the applicant's preferences.

## Viewing Preferences on a Map

Once calculated, distances and in-catchments can be viewed using the **View Preferences On Map** function.

The **View Preferences On Map** hyperlink is only enabled if **Use GIS** is selected for the transfer group. For more information on selecting **Use GIS**, see [Adding Basic Details \(Phased\)](#) on page 83.

- Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

**Preferences (2)** [Edit](#) 0 Inactive Preferences. Active Preferences Only:

Receiver	Offer Status		
1 820 2051 Gravenhurst Academy 0 sibling   Late: No   Dist:	Offer	<a href="#">Delete</a>	<a href="#">View Reasons</a> ▶
2 820 4040 Queen Anne Secondary School 2 sibling   Late: No   Dist:	Waiting List	<a href="#">Delete</a>	<a href="#">View Reasons</a> ▶

[Copy Applicant Reasons](#)   [Set Preference Inactive](#)   [Send Progress Update](#)

[Calculate Catchments & Distances](#)   [View Preferences On Map](#)   [View Distance Calculation Error/Status Log](#)

- Click the **View Preferences On Map** hyperlink to display the **View Preferences** dialog.

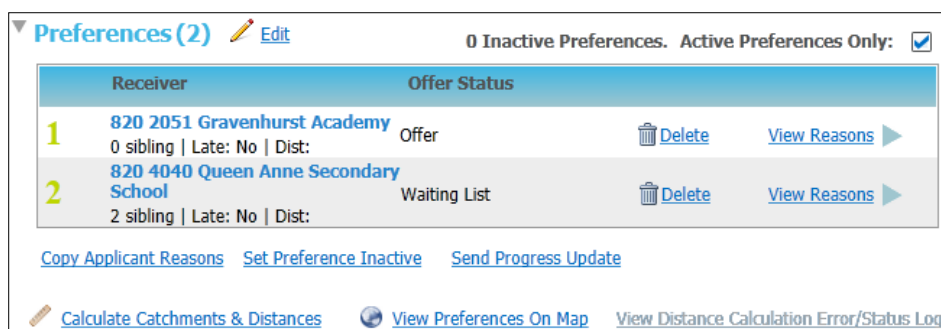
**NOTE:** After the link is clicked, One checks whether the preference base addresses are geocoded. If any are not geocoded, the **Addresses Not Geocoded** dialog is displayed. In this case, click **Continue To View Map** to open the **View Preferences** dialog. Non-geocoded addresses cannot be viewed on the map.

- Use the check boxes to select the preferences that you wish to view on the map.
- Optionally, add walking and / or driving routes to the map by clicking the **Map Options** drop-down box and selecting **Show walking routes** and **Show driving routes** respectively.

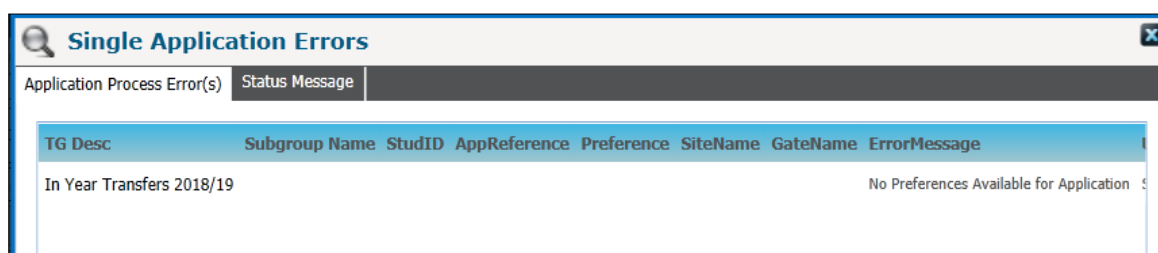
## Viewing Distance Calculation Errors and Status Messages

Errors and status messages that were generated during individual preference calculation can be viewed via the **Distance Calculation Error/Status** log.

- Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.



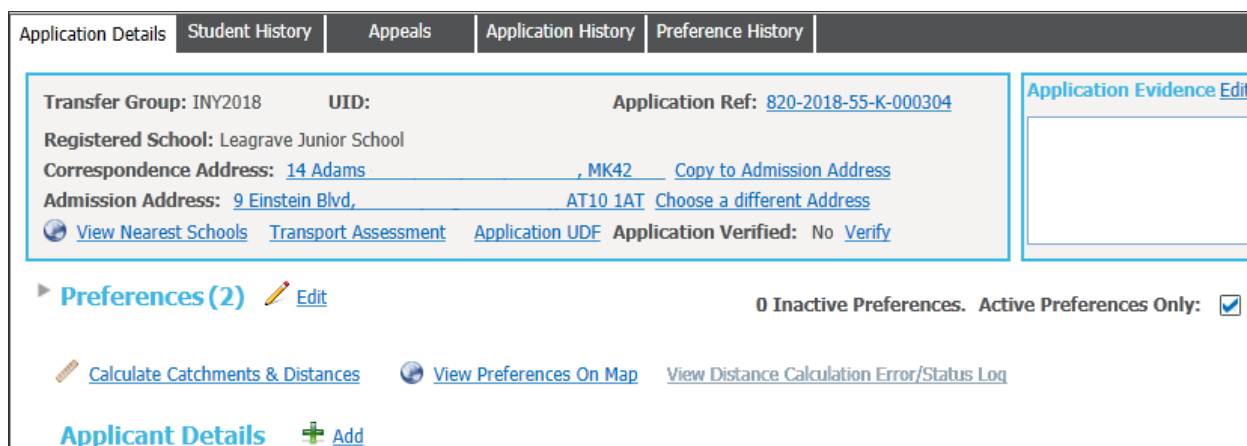
2. Click the **View Distance Calculation Error/Status Log** hyperlink to display the **Single Application Errors** dialog. Errors are displayed on the **Application Process Errors** tab and status messages are displayed on the **Status Messages** tab.



## Editing Applicant Details

**Applicant Details** is a section of the **Application Details** tab. It displays the details of the person who made the selected application for the student, and the method by which they requested to be notified of the outcome of their application.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.



2. Open the **Applicant Details** section to view the applicant's personal information.
3. Click the **Edit** hyperlink to make the applicant's personal information editable.

Application Details	Student History	Appeals	Application History	Preference History
---------------------	-----------------	---------	---------------------	--------------------

▼ **Applicant Details** [Edit](#)

Dr   *Middle Name* McKay  \* *Initials*  \* Responsibility:  FOF - Foster Father - FOF  \*

Home Phone  Work Phone  Mobile Phone

Email Address

Notify By: Email:  Text:  Online:  Letter:

Adams Close,  Bedford, MK42  \* [Choose a different Address](#)

[Clear Address](#)

Alternative Contact Notes

**NOTE:** If no applicant details have been recorded yet, the **Add** hyperlink is displayed instead of the **Edit** hyperlink. Both hyperlinks display the same editable fields when clicked.

4. Enter the applicant's **Surname** and **Relationship** to the child.
5. Select the **Applicant Address**. You can do this in one of two ways:

### Set Address from Student

Click the **Set Address from Student** hyperlink to copy the student's correspondence address into the applicant address. If the applicant details have already been saved you are asked to confirm that you wish to overwrite the existing applicant address with the student's correspondence address.

**NOTE:** If the student's correspondence address is subsequently changed, the address in the **Applicant Details** is not automatically updated. You can use **Set Address from Student** to update the applicant address if appropriate. **Set Address from Student** is not available if the student does not have a recorded correspondence address.

### Search for an address

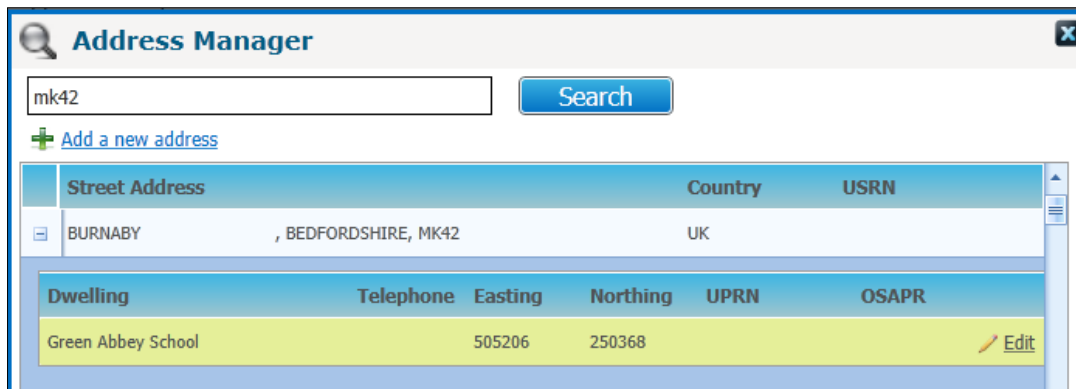
- a. Click the **Find Address** browse to display the **Address Manager** dialog.

Street Address	Country	USRN

- b. Enter at least two characters of a postcode or address into the **Enter Post code or street address** field.
- c. Click the **Search** button to display a list of streets that match your search criteria.

Street Address	Country	USRN
BARFORD AVENUE, BEDFORD, BEDFORDSHIRE, MK42 0DS,	UK	
BURNABY ROAD, BEDFORD, BEDFORDSHIRE, MK42 1GH,	UK	

- d. Select the required street to view a list of the dwellings located on that street.



- e. Highlight a dwelling and then click the **Select** button to select that address.

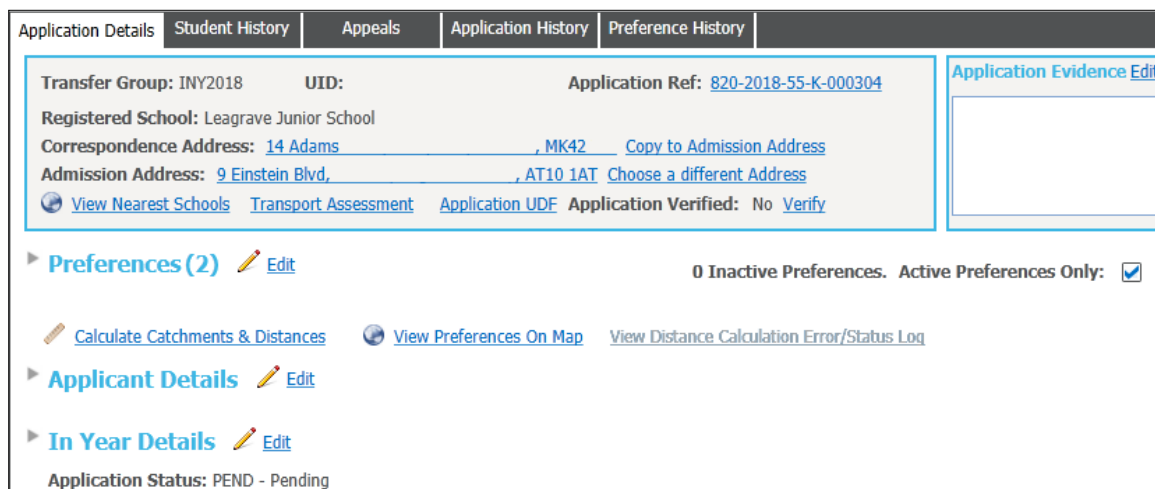
**NOTE:** If you cannot find the address you need, you can click the **Add a new address hyperlink** to add the address to the catalogue. See [Adding an Address to the Address Catalogue](#) on page 238 for more information on adding addresses to the catalogue.

6. If required, fill out the rest of the fields in the **Applicant Details** section.
7. Click **Save** to save your changes.

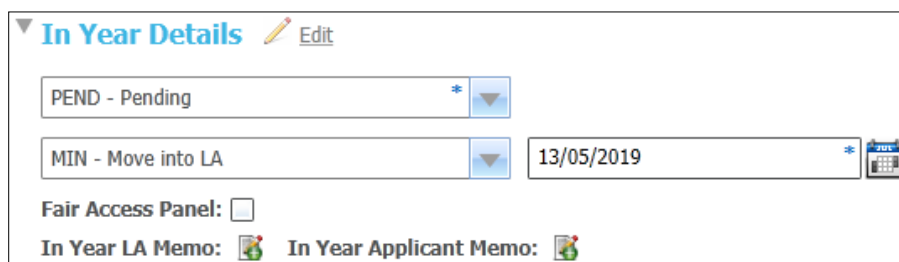
## Editing In Year Details

The **In Year Details** tab displays information relevant to In Year applications. It is only displayed if the selected application is for an In Year transfer group.

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.



2. Open the **In Year Details** section to view information relevant to In Year applications.
3. Click the **Edit** hyperlink to make the fields in the **In Year Details** section editable.



4. Select a status code from the **Application Status** drop-down menu. The following options are available:
  - **PEND:** Pending
  - **WAQA:** Waiting for information from other admission authority
  - **PROC:** Processing, offer to applicant not yet made
  - **OFFW:** Offered and waiting for applicant response
  - **CLOS:** Closed/completed.

When an application is first added to an In Year transfer group the application status automatically defaults to **PEND** (Pending).

5. Enter a date into the **Date Place Required** field. This field must be completed before any preference data is added for the application.
6. Optionally, select an **Application Reason** from the drop-down menu. This lookup does not have any seeded codes or external codes and is used for reporting purposes only.

**NOTE:** The **In Year Application Reason** codes should be set up to help users to understand how they need to process applications.

For example, it is useful to be able to distinguish between applications where the child already has a school place locally but remains on a waiting list for other schools, and applications where the child would otherwise be without a place so needs to be found a place immediately (e.g. they have recently moved into the area or have been excluded). Your Local Authority may wish to record multiple reasons that fit into these two general categories.

7. If the application is to be reviewed by a Fair Access panel:
  - a. Select the **Fair Access Panel** checkbox. The **Fair Access Reason** and **Fair Access Panel Decision** fields are displayed.
  - b. Select a **Fair Access Reason**. The available reasons are listed in the following table:

Code	Lookup Description	Full Description, as in 2009 Code
PRU	Attends PRU, to be reintegrated	Children attending PRUs who need to be reintegrated back into mainstream education
CAR	Child is a Carer	Children who are carers
REF	Child of Refugee or Asylum Skr	Children of refugees and asylum seekers
MED	Disability or Medical Condit'n	Children with disabilities or medical conditions
HOM	Homeless child	Homeless children
POL	Known to Police/Other Agency	Children known to the police or other agencies
MOV	Moved into area, no place	Children whose parents have been unable to find them a place after moving to the area, because of a shortage of places
ATT	No place/Serious attend issues	Children without a school place and with a history of serious attendance problems
OUT	Out of Education for > 1 term	Children who have been out of education for longer than one school term
CRIM	Returning criminal justice sys	Children returning from the criminal justice system



Code	Lookup Description	Full Description, as in 2009 Code
SEN	SEN Child with no Statement	Children with special educational needs (but without a statement)
SERV	Service or Crown Servant Child	Children of UK service personnel and other Crown Servants
TRAV	Traveller Child	Traveller children
UNSP	Unsupportive family no place	Children with unsupportive family backgrounds, where a place has not been sought
WITH	Withdrawn after fixed excl	Children withdrawn from schools by their family, following fixed term exclusions and unable to find another place

The codes listed in this table are abbreviated descriptions of the Fair Access reasons that are included in Appendix 3 of the School Admissions Code 2009. All lookup descriptions are limited to 30 characters, hence the abbreviations, but can be added to or amended by each Local Authority.

- c. Select a **Fair Access Panel Decision**, if known. Each Local Authority needs to define its own entries for this lookup.

**NOTE:** Fair Access Panels give special consideration to In Year applications that meet one or more of the fair access criteria. This is to ensure that children who may be already disadvantaged in some way are not further disadvantaged through admissions processing. For example, a looked-after child seeking an In Year admission may be considered by the Fair Access Panel.

In some cases, the Fair Access Panel may decide to award a child a place at a school even if a vacancy does not exist (i.e. the school is over PAN). These cases are processed manually and are not part of the normal Make/Resolve Offers routines.

8. Optionally, record an **In Year LA Memo**. This memo enables you to record any extra In Year application information that the LA may need to store against the child's record.

For more information on recording memos, see [Recording Memos](#) on page 267.

9. Optionally, record an **In Year Applicant Memo**. This memo enables you to record any information that the applicant may have provided in relation to their application.

For more information on recording memos, see [Recording Memos](#) on page 267.

10. Click the **Save** button to save your changes.

**NOTE:** A combination of the **In Year Application Reason** and the **Fair Access Panel Reason** may be helpful for management reporting. One does not automatically take into account In Year application reasons or Fair Access Panel reasons when processing records.

For example, if your Local Authority uses the Make Offers process for In Year applications and a child cannot currently be made an offer then that child is always given a preference for the No Offer base. You should examine the application reasons and Fair Access Panel information manually to see if a place needs to be found immediately.

## Recording Application Withdrawal Details

1. Select an application and ensure that the **Application Details** tab is displayed. For more information on selecting applications, see [Selecting an Application](#) on page 7.

The screenshot shows the 'Application Details' tab selected. It contains the following sections:

- In Year Details** (with an 'Edit' link): Application Status: PEND - Pending
- Additional Details** (with an 'Edit' link)
- Additional Information Requested**: No further information
- Withdrawal Details** (with an 'Edit' link)

2. Open the **Withdrawal Details** section to view information relevant to the withdrawal of the application. This section has two parts:
  - **From Procedure:** When selected, indicates that the student has withdrawn from their application.
  - **From Test:** When selected, indicates that the student has withdrawn from the test part of the selection procedure, although their application is still active.

The screenshot shows the 'Withdrawal Details' section with the following information:

- From Procedure:** Withdrawal: No Date: Reason: -
- From Test:** Withdrawal: Yes Date: 14/05/2019

3. Click the **Edit** hyperlink to make the information in the **Withdrawal Details** section editable.

The screenshot shows the 'Withdrawal Details' section in edit mode. It includes the following fields:

- From Procedure:** Withdrawal:  Withdrawn Date:  Withdrawn Reason:
- From Test:** Withdrawal:  14/05/2019

4. If the student has withdrawn their application altogether, fill out the **From Procedure** fields:
  - a. Select the **Withdrawal** check box. This box indicates that the application has been withdrawn.
  - b. Enter a **Withdrawn Date**.
  - c. Optionally, select a **Withdrawn Reason** from the drop-down menu.
5. If the student has only withdrawn from the test part of the selection procedure, fill out the **From Test** fields:
  - a. Select the **Withdrawal** check box. This box indicates that the application has been withdrawn.
  - b. Enter a **Withdrawn Date**.
6. Click the **Save** button to save your changes.

If you entered data into the **From Procedure** fields, then the student is allocated to the **Withdrawn** base, as defined in **Process | Transfer Groups**. This ensures that this student is included in a Withdrawal ADT file.

## Managing Appeals

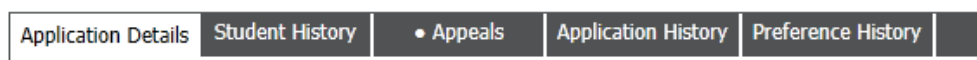
Admissions Appeals may be made for a range of reasons. For example, an In Year admissions appeal may be made if a student has moved into the area, if a place has not been offered at a preferred base as part of the standard transfer process, or if a student has been placed within the mainstream band of a school and wishes to appeal for a place in the ability or aptitude band. In the latter example the student may already be registered at the school to which they are appealing.

Appeals can be managed through both the **Students | Applications | Appeals** screen and the **Process | Appeals** screen. Recording through **Students | Applications | Appeals** enables you to select a student and then view any appeals that may exist against that student's applications, while **Process | Appeals** enables you to view the appeals that have been recorded against a particular receiver.

Parents can record basic details about the type of appeal they are lodging. This is intended only as an indication that an appeal will be lodged, rather than facilitating the actual appeal itself. Therefore, as well as being created manually, appeals can also be populated via the import process. The functionality can be enabled or disabled via **Process | Transfer Groups | E-App Settings** and checking or unchecking the **Enable Parent/Carer Appeal Request Online** checkbox.

## Viewing Imported Appeals

Imported Appeals are highlighted within **Students | Applications** when one or more appeal is present, as shown below:

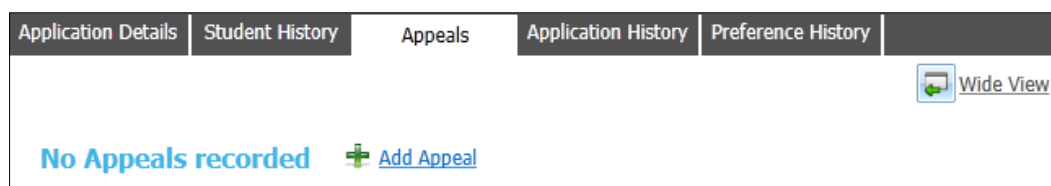


## Recording Appeals

1. Open **Add Appeal Details** for a particular preference. These fields can be accessed in either of the following ways:

### Via Students | Applications | Appeals:

- a. Select an application. For more information on selecting applications, see [Selecting an Application](#) on page 7.
- b. Select the **Appeals** tab to display a list of appeals against the selected application.



- c. Click the **Add Appeal** hyperlink to display the **Add Appeal Details** fields.

- d. Select a preference from the **Choose Preference for Appeal** drop-down menu.

**Via Process | Appeals:**

- a. Select **Process | Appeals**.
- b. Enter a **Transfer Group Code or Description** into the search field.
- c. Optionally, enter additional search criteria.
- d. Click the **Search** button to display a list of the bases that match your criteria.

Receiver	Balance	Vacancies	Prefer
<b>Aylesbury Grammar School</b> LA: 825 No: 4500	0	0	
<b>Denbigh High School</b> LA: 826 No: 4038	0	0	

- e. Select a base to view a list of preferences for that base.

Name	Pref No.	Allocation Status	Appl. Date	Appl. Reason
<b>Sheppard,</b>	2	Waiting List		<a href="#">Add Appeal</a>

- f. Click the **Add Appeal** link for a particular preference to display the **Add Appeal Details** fields.

Appeals for Sheppard, School - Waiting List - Preference 2- 820 (4040) Queen Anne Secondary

Appeal Details UDF

Appellant

Date Appeal Lodged  Sent to legal services  Date Appeal/Confirmation

Reason  Status  Result

Attending the Hearing:  Represented by other:  Waive min notice period:

Appeals Memo:

2. Enter the **Date Appeal Lodged**.
3. Optionally, enter **Appellant**, **Sent to Legal Service date**, **Date Appeal Confirmation**, **Reason**, **Status** and **Result** information.
4. Optionally, select whether the appellant will be **Attending the Hearing** or **Represented by Other** using the check boxes.
5. If the appellant has selected to waive their 14 day notice of a hearing to speed up the appeal process, select the **Waive Min Notice Period** check box.
6. If required, enter any additional appeal information into an **Appeals Memo**.  
For more information on recording memos, see [Recording Memos](#) on page 267.
7. Click the **Save** button to save the appeal.

## Editing Appeal Details

1. Open **Appeal Details** for a particular preference. This section can be accessed in either of the following ways:

### Via Students | Applications | Appeals:

- a. Select an application. For more information on selecting applications, see [Selecting an Application](#) on page 7.
- b. Select the **Appeals** tab to display a list of appeals against the selected application.

Application Details	Student History	Appeals	Application History	Preference History
<p>Appeals recorded for In Year Transfers 2018/19 <a href="#">+ Add Appeal</a></p> <p>Preference No: 2 Receiver School: 820 (150) Queen Anne Secondary School Offer Status: Waiting List</p>				

- c. Click the arrow next to the appeal you wish to edit to display and then click the **View Appeal / Hearing Details** hyperlink to view further details related to the selected appeal.

Appeal for preference 2 - 820 (150) - Queen Anne Secondary School - Waiting List Delete More options...

Appeal Details UDF

Appellant: Dr McKay

Date Appeal Lodged: 14/05/2019 Sent to legal services: - Date Appeal/Confirmation: -

Reason: Distance Status: Admissions Statement Pending Result: -

Attending the Hearing: No Represented by other: No Waive min notice period: No

Appeals Memo:

- d. Click the **Edit** hyperlink in the **Appeal Details** section to make the appeal's details editable.

**Via Process | Appeals:**

- a. Select **Process | Appeals** to display the **Appeals** page.

- b. Enter a **Transfer Group Code or Description** into the search field.
- c. Optionally, enter additional search criteria.
- d. Click the **Search** button to display a list of the bases that match your criteria.
- e. Select a base to view a list of preferences for that base.

Students Preferences

**1 Preference Records | 0 Appeal Lodged**

Student Forename or Surname

Name	Pref No.	Allocation Status	Appl. Date	Appl. Reason
Sheppard,	2	Waiting List		<a href="#">Add Appeal</a>

- f. Click the **View Appeal** hyperlink next to the required preference to view details of that preference's appeal.

- g. Click the **Edit** hyperlink in the **Appeal Details** section to make the appeal's details editable.

2. Make the required changes. **Date Appeal Lodged** is a required field. All other fields are optional.

**NOTE:** To delete the preference altogether, click the **Delete** hyperlink.

3. Click the **Save** button to save your changes.

## Recording Hearing Details

Like appeals themselves, hearing details can be recorded and edited through both the **Students | Applications | Appeals** and **Process | Appeals** screens. You can only record hearing details against pre-existing appeals.

1. Ensure that the appeal the hearing corresponds to is recorded in One. For more information on recording appeals, see [Recording Appeals](#) on page 44.
2. Open **Hearing Details**. This section can be accessed in either of the following ways:

### Via Students | Applications | Appeals:

- a. Select an application. For more information on selecting applications, see [Selecting an Application](#) on page 7.
- b. Select the **Appeals** tab to display a list of appeals against the selected application.

- c. Click the arrow next to the appeal to which the hearing corresponds and then click the **View Appeal / Hearing Details** hyperlink to view further details related to the selected appeal.

- d. Click the **Edit** hyperlink in the **Hearing Details** section to make the hearing fields editable.

**Via Process | Appeals:**

- a. Select **Process | Appeals** to display the **Appeals** page.

- b. Enter a **Transfer Group Code or Description** into the search field.
- c. Optionally, enter additional search criteria.
- d. Click the **Search** button to display a list of the bases that match your criteria.
- e. Select a base to view a list of preferences for that base.


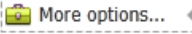
Name	Pref No.	Allocation Status	Appl. Date	Appl. Reason
Sheppard,	2	Waiting List	14/05/2019 00:00:00 AM	D





## Managing Applications

- f. Click the **View Appeal** hyperlink next to the required preference to view details of that preference's appeal.

Students Preferences


← Appeals for Sheppard, Anne Secondary School - Preference 2- 820 (4040) Queen - Preference 2- 820 (4040) Queen  


▼ Appeal Details  [Edit](#) [UDF](#)


Appellant: Dr McKay  
Date Appeal Lodged: 14/05/2019  
Reason: Distance  
Attending the Hearing: No  
Appeals Memo: 

Sent to legal services: -  
Status: Admissions Statement Pending  
Represented by other: No

Date Appeal/Confirmation: -  
Result: -  
Waive min notice period: No


▼ Hearing Details  [Edit](#)




Date of Hearing: -  
Appeal Venue: -  
Clerk: -  
Interpreter Required: No  
Hearing Memo: 


Time of hearing: -  
Room: -  
LA Officer: -  
Language: -  
Other Needs Memo: 



Appeal Committee: -

- g. Click the **Edit** hyperlink in the **Hearing Details** section to make the hearing fields editable.



▼ Hearing Details  [Edit](#)

Date of Hearing  Time of Hearing : HH:MM  Appeal committee 

Appeal Venue  Room

Clerk  LA Officer 

Interpreter Required:




Hearing Memo:  Other Needs Memo: 

- Record the details of the hearing. All fields are optional.
- If required, record further notes about the hearing. There are two memos available in the **Hearing Details** section:
  - **Hearing**: enables you to add notes about the hearing itself.
  - **Other Needs**: enables you to record additional requirements - for example if disability access or hearing facilities are required.
- Click the **Save** button to save your changes.

## Viewing the Application History

The **Students | Applications | Application History** tab records all key changes made to the selected application, including when applications were added, imported from online (including resubmissions) or changed.

1. Select an application. For more information on selecting applications, see [Selecting an Application](#) on page 7.
2. Select the **Application History** tab to view a log of the application's changes.

Application Details	Student History	Appeals	Application History	Preference History		
<b>Application History for In Year Transfers 2018/19</b>						
 Wide View  Export  Print						
Last Updated	Last Updated By	Applic Verified	Application Entered	Application Received	Date Place Required	Application
13/05/2019	System Administrator	No	10/05/2019	10/05/2019	13/05/2019	Move into LA
10/05/2019	System Administrator	No	10/05/2019	10/05/2019	13/05/2019	Move into LA




**NOTE:** Click the **Export** hyperlink to export the contents of the **Application History** tab to a .CSV or .XLS file.

Click the **Print** hyperlink to print the application history.

## Viewing a Student's Preference History

The **Students | Applications | Preference History** tab lists all changes made to a student's preference records, including deleted and inactive preferences.

1. Select an application. For more information on selecting applications, see [Selecting an Application](#) on page 7.
2. Select the **Preference History** tab to view the student's preference history.

Application Details	Student History	Appeals	Application History	Preference History		
<b>Preference History for Sheppard 10/05/2010 Transfer Group: INY2018</b>						
 Wide View  Export  Print						
Last Updated	Updated By	Old Status	New Status	Rank	Old Preference Base	New Preference Base
13/05/2019 15:41:07 PM	System Administrator	Offer	Offer		Gravenhurst Academy	Gravenhurst Academy
13/05/2019 15:41:07 PM	System Administrator	Waiting List	Waiting List		Queen Anne Secondary School	Queen Anne Secondary School

**NOTE:** Click the **Export** hyperlink to export the contents of the **Preference History** tab to a .CSV or .XLS file.

Click the **Print** hyperlink to print the preference history.

## Viewing E-Application Details

The **E-Application Enquiries** page enables you to a summary of a particular student’s online applications and submission status. The information displayed is read only.

1. Select **Students | E-Application Enquiries** to display the **E-Application Enquiries** page.

The screenshot shows the 'E-Application Enquiries' page with the following search filters:

- Student Name: [Empty]
- Student DOB (dd/mm/yyyy): [Empty]
- Applicant Name: [Empty]
- Transfer Group Code or Description: [Empty]
- Application Removal Reasons: [Dropdown menu]
- Checkboxes:  Not Submitted,  Not yet transferred,  Closed By Applicant
- Buttons: Clear Search, Search

Table Header:

Applicant's Name	Student Name	DOB	UID	Postcode	Transfer Group	Inactive	Submission Status	Transferred	Closed Reason
------------------	--------------	-----	-----	----------	----------------	----------	-------------------	-------------	---------------

2. Optionally, enter student details into the search fields at the top of the page.
3. If you want to search for applications that have been saved but not yet submitted, select the **Not Submitted** check box.
4. If you want to limit your search to application that have been imported successfully, select the **Transferred Applications** check box.
5. Click the **Search** button to view a list of applications that match your criteria.

The screenshot shows the search results for 'mckay' with the following table:

2 enquiries matching for "mckay"

Applicant's Name	Student Name	DOB	UID	Postcode	Transfer Group	Inactive	Submission Status	Transferred	Closed Reason
<b>McKay, Dr</b>	Sheppard,	10/05/2010	820	AT10 1AT	INY 2018	No	Submitted	No	<a href="#">View Application</a>
<b>McKay, Dr</b>	Sheppard,	10/05/2010		AT10 1AT	INY 2018	Yes	Closed By Applicant	No	No longer required <a href="#">View Application</a>

6. If you wish to view further details on a particular application, click that application’s **View Application** hyperlink. The **Online Application** dialog is displayed.

**NOTE:** To print a summary of the application’s details, click the **Print** button at the bottom of the **Online Application** dialog.

## 04 | Managing Students

The **Students | All Students** page enables you to search for a student and to view or edit some of that student's personal details. You can also view any current and past applications the student has made and manually add a new application if necessary (if you have suitable user rights).

### Selecting a Student

1. Select **Students | All Students** to display search fields relating to student details.

2. Optionally, enter search criteria into the **Student Name or Unique Pupil Number** field. The drop-down menu to the left of the **Student Name or Unique Pupil Number** field enables you to select different types of name search:
  - **Begins With** - Enter the first few characters of a **Surname, First Name, Middle Name or Unique Pupil Number**.
  - **Contains** - Enter a few characters from anywhere in the string of the **Surname, First Name, Middle Name or Unique Pupil Number**.
  - **Name Sounds Like** - Returns students whose **Surname, First Name or Middle Name** sounds like that entered in the **Student Name or Unique Pupil Number** field.  
This search also takes misspellings into account. For example, a search for “Krabb” would also return students by the name of “Crabb” and “Crabbe”.
3. Fill out the **DOB, Student ID and Postcode** fields as required.
4. If you wish to search for only those students who are currently active, select the **Active Students Only** check box.
5. Optionally, enter further search criteria into the **More Options** fields:
  - a. Click the **More Options** hyperlink to display further search fields.
  - b. Enter a **Base Name, URN or School No.**
  - c. Optionally, enter base filter information:
    - i. Click the **Filter Base Suggestions** hyperlink to view editable base filter fields.
    - ii. Use the radio buttons to select whether you want to search within **Home LA, Other LA or All bases**.
    - iii. Select a **Base Type** and **Base Control** as required.

## Managing Students

- iv. If you wish to search only those bases that are currently active, select the **Active Bases Only** check box.
      - d. Use the radio buttons to select whether you want to search students from the **Home LA**, **Other LAs**, or **All LAs**.
      - e. Enter **Gender** and **NCY** details.
      - f. Select an option from the **Current Application** filter field. The available options are **All**, **Students In An Active Transfer Group** and **Students Not In An Active Transfer Group**.
6. Click the **Search** button to view a list of students who match your criteria.

Student Name	Postcode	NCY
Sheppard, 10/05/2010	MK42	4

7. Highlight a student to select them.

Sheppard 10/05/2010 | Male

Active: Yes   Student ID:   NCY (inc offset): 4   Home LA: 820-Bedfordshire 820

2 Current Applications   A&T Memo:   0 Past Applications   Funding LA: 820-Bedfordshire 820

Applications Summary | Student Basic Details | Special Needs | Student Additional | Student History | Carers | Relocation | Public Care

Current Applications   Past Applications   Add New Application   Wide View

[In Year Transfer Group - INY 2018](#)

[Transfer Group - PR1 2019](#)

Once the student has been selected, the student's details are displayed in the **Student Summary** panel at the top of the right-hand pane. Any current or past applications that the student has made are listed on the **Applications Summary** tab as hyperlinks. You can open an application by clicking on it.

**NOTE:** When you select a student, any risk alerts that have been defined for that student are displayed immediately. Risk alerts are defined for individual students by clicking on the **Alert** hyperlink in the top right of the student summary header. For more information on creating alerts, see [Defining Risk Alerts](#) on page 61

Alerts are visible against the Student Details anywhere in v4 client, A&T Back Office or CSS v4 Online.

## Adding a Student

1. Select **Students | All Students** to display the **All Students** page.

- Click the **Search** button to display the **Add New Students** hyperlink.

Students

Begins with

DOB: (dd/mm/yyyy)  Student ID  Postcode

Active Students Only

[More Options](#) [Clear Search](#) [Search](#) [+ Add New Student](#)

- Click the **Add New Student** hyperlink to display editable fields relating to student details.

**NOTE:** Any criteria entered into the search fields (except the **Student Name** and **UPN** fields) are carried over into the details of the new student.

**Add New Student**

Forename  \* Middle Name  Surname  \*

DOB: (dd/mm/yyyy)  \* Gender  \* NCY  Offset (years)

Home LA  Funding LA

Chosen Forename  Chosen Surname

Select Current Address  [Clear Address](#)

Base Name, URN, School No.

- Enter a **Forename**, **Surname**, **Date of Birth** and **Gender** for the student. These fields are all mandatory.
- Enter **Middle Name**, **Chosen Forename** and **Chosen Surname** details as required.
- If the student is studying in a different NCY to their chronological NCY, enter the student's **Offset**. The **Offset** is the difference In Years between the student's actual and chronological NCYs.  
The student's chronological NCY is calculated automatically.
- Optionally, select the student's **Home LA** and **Funding LA**.
- If required, select the student's current address:
  - Click the **Select Current Address** browse to display the **Address Manager** dialog.

**Address Manager**

Enter Post code or street address  [Search](#)

[+ Add a new address](#)

Street Address	Country	USRN

- Enter at least two characters of a postcode or address into the **Enter Post code or street address** field.
- Click the **Search** button to display a list of streets that match your search criteria.

## Managing Students

**Address Manager**

Search:

[+ Add a new address](#)

Street Address	Country	USRN
BARFORD AVENUE, BEDFORD, BEDFORDSHIRE, MK42 0DS,	UK	
BURNABY ROAD, BEDFORD, BEDFORDSHIRE, MK42 1GH,	UK	

- d. Select the required street to view a list of the dwellings located on that street.

**Address Manager**

Search:

[+ Add a new address](#)

Street Address	Country	USRN
BURNABY BEDFORDSHIRE, MK42	UK	

Dwelling	Telephone	Easting	Northing	UPRN	OSAPR
Green Abbey School		505206	250368		<a href="#">Edit</a>

- e. Highlight a dwelling and then click the **Select** button to select that address.

**NOTE:** If you cannot find the address you need, you can click the **Add a new address** hyperlink to add the address to the catalogue. For more information on adding addresses to the catalogue, see [Adding an Address to the Address Catalogue](#) on page 238.

9. If required, select a base for the student:
- Click the **Base Name, URN, School No.** browse to display the **Base Search** dialog.

**Base Search**

Base Name:  School Number:  Base Types:

LA Bases:  Not Applicable:  Clusters:

URN:   B2B Student Base  Show Active  Show Inactive  Show All

0 Bases

Name	Base Type	LA	School No.	Control	Active
No results found. Please review your search options.					

- Enter search criteria for the base and then click the **Search** button to view a list of the bases that match your criteria.

**Base Search**

queen School Number Base Types  
 LA Bases Not Applicable Clusters  
 URN  B2B Student Base  Show Active  Show Inactive  Show All  
 Clear Search Search

2 Bases

Name	Base Type	LA	School No.	Control	Active
Queen's Park Primary School (p4mt)	Primary	Bedfordshire 820	2045		Yes
Queen Anne Secondary School	Secondary	Bedfordshire 820	4040	LEA Controlled	Yes

c. Highlight a base and then click the **Select** button to select that base and close the dialog.

10. Click the **Save** button to create the student.

11. If One finds any existing students with similar details, the **Existing Students** dialog is displayed. This dialog lists those students who have similar details. You should review the students in the dialog to ensure that the student you are creating does not already exist in the One database.

If you are sure that the student you are creating is not a duplicate of a current student, click the **Save** button to save the new student's details.

## Editing Student Details

Once a student is selected, that student's core details are displayed on the **Student Summary** header panel. These details can be edited if required. In addition, further student details can be viewed and edited via the **Student Basic Details** and **Student Additional** tabs.

### Editing Student Core Details

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Click the **Edit Student Details** hyperlink in the **Student Summary** panel to make the selected student's **Name**, **Gender**, **LA**, **DOB** and **UPN** details editable.

Forename \* Sheppard \* 10/05/2010 \* Male \*

**Edit Student Details**

Active: Yes Student ID: NCY (inc offset): 4 820-Bedfordshire 820  
 2 Current Applications A&T Memo: 0 Past Applications 820-Bedfordshire 820

Middle Name Sheppard  
 Current Age: 9/0 NCY Offset: 0 SEN Status:  
 UPN Local UPN Public Care: No  
 Current School: Leagrave Junior School Student Memo:  
 Correspondence Address: 14 Adams, Bedford, MK42

[View Nearest Schools](#) [Transport Assessment](#)

3. Make the required changes.
4. Click the **Save** button to save your changes.



## Editing Student Basic Details

The **Student Basic Details** tab enables you to add additional information about a student, alongside that displayed in the core details. All of the fields listed below are optional.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student Basic Details** tab to display editable fields relating to student details.

3. Enter NCY details for the student:
  - a. Open the **Student Profile** section to view the student's profile.
  - b. Click the **Edit** hyperlink to make the **Student Profile** fields editable.

- c. Enter a new NCY into the **NCY** field. If you enter an NCY that is not the child's chronological NCY, the **Offset** field updates automatically.
  - d. If the child is not following the NCY system at all, select the **Not Following NCY** check box.
  - e. Click the **Save** button to save your changes.
4. Enter addressee details for the student:
    - a. Open the **Addressee** section to display the **Addressee** field.
    - b. Click the **Edit** hyperlink to make the field editable.

- c. Enter a new addressee for the student. This is the name of the person that correspondence regards the student is addressed to.
  - d. Click the **Save** button to save your changes.
5. Enter language details for the student:
    - a. Open the **Language Details** section to display fields relating to the student's language skills.
    - b. Click the **Edit** hyperlink to make the fields editable.

- c. Select the student's **Home Language** and **First Language** from the drop-down list.
  - d. If the student speaks English as an additional language, select the **EAL** check box.
  - e. If your local authority is Welsh and the student is an EAL Acquisition student, select the **EAL Acquisition** check box.
  - f. Click the **Save** button to save your changes.
6. Enter ethnicity, religion and culture details for the student:

- a. Open the **Ethnicity, Religion and Culture** section to display fields relating to the student's cultural background.
- b. Click the **Edit** hyperlink to make the fields editable.

- c. Select the student's **Nationality, Country of Origin, Student Ethnicity, Ethnic Source, Religion** and **Culture** from the menus as required.
- d. Click the **Save** button to save your changes.

## Editing Student Supporting Details

The **Student Additional** tab enables you to record supporting information about a student. You can also use this tab to record traveller family and asylum seeker details.

All fields on this tab are optional.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student Additional** tab to display fields relating to student details.

3. Enter supporting details for the student:
  - a. Open the **Supporting Details** section to view fields relating to information that could support the student's application. The following fields are displayed:
    - **Social Services:** This should be selected if this student is monitored by Social Services.
    - **Care Order:** This should be selected if this student has a Care Order against them.
    - **Student Carer:** This should be selected if this student is caring for an adult at home.

- **PEP:** This should be selected if Social Services hold a Personal Education Plan for this student.
- **Service Family:** This should be selected if the student is a member of a service family.
- **FSM Eligibility:** This should be selected if this student is eligible for Free School Meals.
- **G&B FSM Eligibility:** Displays the read-only value returned by the FSM Scheduled Task, which compares the eligibility status recorded in the G&B claims area with the current FSM Eligibility value recorded in the **Student | Supporting Details** panel.

The eligibility status is determined by the business rules defined in the scheduled task. If this field is visible, it should take precedence over the value in the **FSM Eligibility** field. This field is visible only if you have a valid G&B licence (v3 or v4).

- **Gifted and Talented:** This should be selected if this student is on the Gifted and Talented register as required by the DfE.
- **EOTAS:** This checkbox is available to Welsh Local Authorities only. It should be selected if this student is being Educated Other than at School (for example at home, in a Pupil Referral Unit or other establishment that is not a school). Changes to this checkbox can be viewed in the EOTAS History panel on the **Students | All Students | Student History** tab.
- **Mode of Travel:** Mode of Travel is view only.
- **SEN:** If required, select a **SEN Status** from the drop-down (table ID: 0608) and set the **SEN Start Date** to today's date. A different start date can be selected.
- **Youth Support Services Agreement Indicator:** If required, select a **Youth Support Services Agreement Indicator** from the drop-down (table ID: 0708), to indicate whether or not this consent has been sought.

b. Click the **Edit** hyperlink to make these fields editable.

The screenshot shows the 'Supporting Details' section of a student record. It includes an 'Edit' link and several fields: Social Services, PEP, Gifted and Talented, Mode of Travel, Care Order, Service Family, SEN Status, Student Carer, FSM Eligibility, G&B FSM Eligibility (set to 'No'), and Youth Support Services Agreement Indicator (a dropdown menu).

c. Make the required changes.

d. Click the **Save** button to save your changes.

4. If the student is from a traveller family, record their traveller status:

a. Open the **Traveller Family** section to display the **Traveller Family** field.

b. Click the **Edit** hyperlink to make the field editable.

c. Select the **Traveller Family** check box. Additional fields relating to the child's status are displayed.

The screenshot shows the 'Traveller Family' section. The 'Traveller Family' checkbox is checked. Below it are four dropdown menus: Traveller Status, Traveller Status Data Source, Traveller Site Type, and Traveller Mobility.

- d. Select the child's **Traveller Status**, **Traveller Status Data Source**, **Traveller Site Type** and **Traveller Mobility** from the drop-down menus.
  - e. Click the **Save** button to save your changes.
5. If the student is an asylum seeker, record their asylum details:
- a. Open the **Asylum Seeker** section to view fields related to the student's asylum seeker status.
  - b. Click the **Edit** hyperlink to make these fields editable.

- c. Select the **Asylum Seeker** check box.
- d. Select an **Asylum Status** (populated by Table ID 0775) from the drop-down menu.
- e. Click the **Save** button to save your changes.

## Defining Risk Alerts

Risk alerts are displayed when a student is selected to warn of risks or concerns that have been registered for that student.

**NOTE:** Write permission to Student Core Data is needed in order to create a risk alert.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.

2. Click the **Alert** hyperlink to display the **Alert Messages** dialog.

3. Click the **Add Alert** hyperlink to display editable fields relating to alert details.

4. Enter an **Alert Message**. This is the message that is displayed when the user selects the student.
5. Optionally, enter an **Expiry Date**. If you do not specify an expiry date then the alert is displayed against the student's record indefinitely.
6. Click the **Save** button to save your changes.

## Marking a Student as Inactive

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student Basic Details** tab to display fields relating to the student's details.
3. Open the **Student Profile** section and click the **Edit** hyperlink to view editable fields relating to the student's status.

The screenshot shows the 'Student Profile' section with the 'Active' checkbox checked. The 'Inactive Reason' is set to 'Inactive Reason' and the 'Inactive Date' is set to '13/05/2019'. The 'Not Following NCY' checkbox is unchecked. The 'Last Updated By' is 'System Administrator' and the 'Last Updated Date' is '13/05/2019 15:40:30'.

4. Deselect the **Active** check box to mark the student as inactive. The **Inactive Reason** and **Inactive Date** fields become editable.

The screenshot shows the 'Student Profile' section with the 'Active' checkbox unchecked. The 'Inactive Reason' and 'Inactive Date' fields are now highlighted in light blue, indicating they are editable. The 'Not Following NCY' checkbox is still unchecked. The 'Last Updated By' and 'Last Updated Date' remain the same.

5. Select an **Inactive Reason** from the drop-down menu.
6. Select an **Inactive Date**. This is the date that the student became inactive.
7. Click the **Save** button to save your changes.

## Editing Deceased Details

The **Deceased Details** section can only be updated if the student has been set to **Inactive** in the **Student Profile** section, and the **Inactive Reason** has been set to **DEC-Deceased**. For more information on this process, see [Marking a Student as Inactive on page 62](#).

On marking a student as deceased, the **Inactive Reason** and **Inactive Date** are updated in the **Student Profile** section.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student Basic Details** tab to display fields relating to the student's details.

The screenshot shows the 'Deceased Details' section with three date fields: 'Date Deceased: -', 'Date Confirmed: -', and 'Date Notified: -'. The 'UDF' (User Defined Field) button is visible in the top right corner.

3. Open the **Deceased Details** section and click the **Edit** hyperlink to view editable date fields.

4. Enter the **Date Deceased** and **Date Notified**.
5. Optionally, enter the **Date Confirmed**.
6. Click the **Save** button to save your changes.

## Recording Student Special Needs

You can use the **Students | All Students | Special Needs** tab to record a student's disability information. You can also use this tab to record a student's **SEN Stage Details**.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Special Needs** tab and click the **Edit** hyperlink to view editable fields related to student disability details.

3. If the student is disabled, select the **Is the person disabled?** check box.
4. If the student is on the disability register, select the **Is the person on the disability register?** check box.
5. If applicable, record disabilities for the student. To record a disability:
  - a. Click the **Add Disability** hyperlink to view editable fields related to disability.

- b. Select a **Disability Description** from the drop down menu.
  - c. Select a **Start Date**.
  - d. If applicable, select an **End Date**.
  - e. If you are recording the student's primary disability, select the **Primary Disability** check box.
  - f. Click the **Save** button to save your changes
6. If the student has a current SEN stage, record their SEN stage details:

## Managing Students

- a. Open the **SEN Stage Details** section to view fields related to the student's SEN status.
- b. Click the **Edit** hyperlink to make these fields editable.

The screenshot shows the 'SEN Stage Details' section with an 'Edit' link. It contains a table with two columns: 'Current SEN Stage' and 'Start Date'. The 'Current SEN Stage' is set to 'P - School Action Plus' and the 'Start Date' is '14/05/2019'. Below the table is an 'Add SEN Status' link.

Current SEN Stage	Start Date
P - School Action Plus	14/05/2019

[+ Add SEN Status](#)

- c. Select a **Current SEN Stage** from the drop down menu.
  - d. Select a **Start Date**.
  - e. Click the **Save** button to save your changes
7. If applicable, record SEN details for the student. To record SEN details:
- a. Click the **Add SEN Status** hyperlink to view editable fields related to disability.

The screenshot shows the 'SEN Stage Details' section with an 'Add' link. It contains a table with two columns: 'Current SEN Stage' and 'Start Date'. The 'Current SEN Stage' is set to 'School Action Plus' and the 'Start Date' is '14/05/2019'. Below the table is an 'Add SEN Status' link. At the bottom, there is a form with a 'SEN Status' dropdown menu and a 'Start Date' field set to '14/05/2019'.

Current SEN Stage	Start Date
School Action Plus	14/05/2019

[+ Add SEN Status](#)

SEN Status: [dropdown] Start Date: 14/05/2019

- b. Select a **Current SEN Stage** from the drop down menu.
- c. Select a **Start Date**.
- d. Click the **Save** button to save your changes

## Recording Carer Details

The **Students | All Students | Carers** tab enables you to record details of a particular student's carers, as well as the relationships between student and carers.

### Adding a Carer

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Carers** tab to view information on the student's carers.

The screenshot shows the 'Carers' tab selected in a navigation menu. Below the menu is a 'Carer Details' section with an 'Add' link. The text 'No Carers found' is displayed. There is also a 'Wide View' button.

Applications Summary | Student Basic Details | Special Needs | Student Additional | Student History | **Carers** | Relocation | Public Care

Carer Details [+ Add](#) [Wide View](#)

No Carers found

3. Click the **Add** hyperlink to display the **Person Search** dialog.

4. Select a person from the dialog:
  - a. If required, enter a **Person Name**. The drop-down menu to the left of the **Person Name** field enables you select different types of name search:
    - **Begins With** - Enter the first few characters of a **Surname**, **First Name** or **Middle Name**.
    - **Contains** - Enter a few characters from anywhere in the string for the **Surname**, **First Name** or Middle Name.
    - **Name Sounds Like** - Returns people whose **Surname**, **First Name** or **Middle Name** sounds like that entered in the **Person Name** field.
  - b. Enter further criteria into the search fields as required. You can view further criteria by clicking the **More Options** hyperlink.
  - c. Click the **Search** button to view a list of people who match your search criteria.

Name	Title	Chosen Name	Given Name 2	Person Id	Postcode	NI Number	NASS Number	Email
<a href="#">McKay, M   01/01/1980</a>	Dr	McKay		891	AT10 1AT			

- d. Select the checkbox of the person you wish to add as a carer and then click the **Select** button. A confirmation dialog is displayed.
- e. Click the **Yes** button to select the person and close the dialog. Fields relating to the carer's relationship to the student are displayed on the **Carers** tab.



5. Select the carer's **Relationship** to the student from the drop-down menu.
6. If applicable, select the **Parental Responsibility** and **Financial Responsibility** check boxes.
7. If the carer has a contact order for the student, enter the order's details into the **Contact Order** field.
8. Click the **Save** button to add the person as a carer for the student.

## Editing Carer Details

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Carers** tab to view information on the student's carers.

3. Select the carer that you wish to edit from the table and then click the **Edit** hyperlink to make that carer's details editable.
4. Make the required changes.
5. Click the **Save** button to save your changes.

**NOTE:** To delete a carer altogether, click that carer's **Delete** icon.

## Recording Relocations

The **Students | All Students | Relocation** tab enables you to record relocation details and updates a student's School History accordingly. You can also use this tab to record details of approaches to schools (to take relocated students) that have been made.

**NOTE:** The features included on the **Relocation** tab also appear in the **Relocation** section of the **Application Details** tab. This section is only displayed when you are viewing In Year applications. For more information on using the **Application Details** tab, see [Editing Application Details](#) on page 15.

The **Application Details | Relocations** section is used in the same way as the main **Relocations** tab.

## Adding a Relocation

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Relocation** tab.
3. Click the **Add Relocation** hyperlink to view editable fields relating to relocation details.

4. Enter a **Process Start Date**.
5. Select the student's **Original School**. (i.e. the school that the student was attending directly before the relocation took place – this defaults to the student's current registered base):
  - a. Click the **Original School** browse to display the **Select a Base** dialog. This dialog displays a list of the schools in the student's School History.

Base Name	Registered	Start Date	End Date	Joining Reason	Leaving Reason
Leagrave Junior School	Yes	10/05/2019			

- b. Highlight a school and then click the **Select** button to select that school and close the dialog.

**NOTE:** Once you have selected an **Original School** you can view that school's full details by clicking the **View Base Details** hyperlink. Clicking this link opens the school's details in the **Bases | All Bases** page. For more information on using the **All Bases** page, see [Selecting a Base](#) on page 219.

6. Select a **Reason for Relocation** from the drop-down menu.
7. Enter **Process End Date**, **Date Left**, **Receiver School**, **Relocation Outcome** and **Reason For Ending Relocation** information as required.
8. Click the **Save** button to save the relocation. The **Update School History** dialog is displayed.

9. Enter an **End Date** (i.e. the date that the student left their original school) and a **Reason for Leaving**.
10. Click the **Save** button to update the school history and close the dialog.

## Editing a Relocation

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Relocation** tab to view a list of the student's existing relocations.

Original School	Date Left	Receiver School	Date Registered	Edit	Delete
Putnoe Primary School (p4r)	14/05/2019			<a href="#">Edit</a>	<a href="#">Delete</a>

[+ Add Relocation](#)

[Relocation Details](#) [Edit](#)

Process Start Date: 15/05/2019 Process End Date: 15/05/2019

Original School: Putnoe Primary School (p4r) [View Base Details](#) (leave the Relocation page)

Reason For Relocation: Moved into Area Date Left: 14/05/2019

Receiver School: - Date Registered: -

Relocation Outcome: - Reason For Ending Relocation: -

3. Highlight the relocation that you wish to edit. Details of that relocation are displayed.
4. Click the **Edit** hyperlink to make the relocation's details editable.

5. Make the require edits and then click the **Save** button to save your changes.

**NOTE:** To delete a relocation altogether, click the **Delete** hyperlink. You can only delete a relocation if no schools have been approached.

## Recording a School Approach

The **Schools Approached** section is displayed once a relocation record has been saved. It enables you to record the schools that have been approached to take the student.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Relocation** tab to display the student's relocation details.

3. Open the **Schools Approached** section to view details of any schools that may have been approached as a result of the student's relocations.

**NOTE:** The **Schools Approached** section is only displayed once the student has at least one relocation recorded.

4. Click the **Add Approach** hyperlink to display editable fields relating to school approaches.

5. Select the **School Approached**:
  - a. Click the **School Approached** browse to display the **Select a Base** dialog.

## Managing Students

Base Name	Base Type	Sch. No.	LA
-----------	-----------	----------	----

- b. Enter search criteria and then click the **Search** button to view a list of bases that match those criteria.

Base Name	Base Type	Sch. No.	LA
Green Abbey School	Secondary	4321	820

- c. Highlight a base and then click the **Select** button to select that base and close the dialog.

**NOTE:** Once you have selected the **School Approached** you can view that school's full details by clicking the **View Base Details** hyperlink. Clicking this link opens the school's details in the **Bases | All Bases** page. For more information on using the **All Bases** page, see [Selecting a Base](#) on page 219.

6. Enter **Status**, **Parental Preference**, **Application Date**, **Notice to Admit Date**, **Notice of Intention to Direct Date** and **Date Registered** information as required.
7. Click the **Save** button to save your changes.

**NOTE:** To edit the details of an approach after recording, highlight the approach in the **Schools Approached** list and click the **Edit** hyperlink. You can also **Delete** approaches from this list.

## Recording Public Care Details

The **Students | All Students | Public Care** tab enables you to record details of a student's public care events.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Public Care** tab to view the student's public care details.

LA	Category	Start Date	End Date	Reason Ceased
----	----------	------------	----------	---------------

3. Click the **Add** hyperlink to display editable fields relating to public care.

**Public Care Details** + [Add](#)

Date first looked after : ✎ [Edit](#)

LA ▼

Category \* ▼

Start Date (DD/MM/YYYY) \* 📅

End Date (DD/MM/YYYY) 📅

Reason Ceased ▼

4. Enter the **Category** and **Start Date** of the care.
5. Enter **LA**, **End Date** and **Reason Ceased** details as required.

**NOTE:** Care events cannot overlap. One returns an error messages if you attempt to record an event that overlaps with an existing event.

6. Click the **Save** button to save your changes.

**NOTE:** If the **Start Date** you specified is earlier than that of any of the student's previous care events, then the **Set Date First Looked After** dialog is displayed. Click **OK** to update the **Date First Looked After** field of the **Public Care** tab with the **Start Date** you specified. You can also edit the **Date First Looked After** field manually by clicking its **Edit** link and entering a new date.

To edit an existing care record, select that record from the list on the **Public Care** tab and then click the **Edit** button.

## Recording Student History

You can access student history from both the **Students | All Students | Student History** and **Students | Applications | Student History** tabs. These tabs enable you to record a student's school and address history. You can also view a summary of the student's name history on these tabs.

### Adding to a Student's School History

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student History** tab to view details of the selected student's history.

Applications Summary | Student Basic Details | Special Needs | Student Additional | **Student History**

▶ **School History** + [Add](#)

▶ **Address History** + [Add](#)

▶ **Name History**

3. Open the **School History** section to view the student's school history.

**School History** + [Add](#)

Base Name	LA No	Sch No	Reg Type	DPW	Registered	Guest	Residential	Start Date	End Date
Leagrave Junior School	820	2080	MN-S	5	Yes	No	No	10/05/2019	

🗑 [Delete](#) [View & Edit full details](#) ▶

## Managing Students

- Click the **Add** hyperlink to view editable fields relating to the student's school.

- Select the school you wish to add:
  - Click the **Base Name, URN, School No.** browse to display the **Base Search** dialog.

- Enter search criteria for the base and then click the **Search** button to view a list of the bases that match your criteria.

- Highlight a base and then click the **Select** button to select that base and close the dialog.
- Enter the number of **Days Per Week** that the student attends/attended the school. You can enter half days if required.
  - Use the check boxes to select the student's status at the school. There are four selectable options:
    - **Registered:** The base is the student's main registered base.
    - **Dual Registered:** The student has dual registration status at the base.

**NOTE:** A student may have one **Registered Base** and one **Dual Registration**. Only one box may be checked per base record, unless the **School History** shows another record for the same base with a different **Start Date**. If this is the case, the base may be both **Registered** and **Dual Registered**.


- **Guest:** The student uses the base's facilities but is not registered or dual registered at the base.
  - **Residential:** The student is a resident at the base.
8. If you selected the **Residential** check box, select a **Registration Type** from the drop-down menu. If you selected any of the other check boxes in the previous step, the **Registration Type** field is automatically filled in.
  9. Select the student's **Start Date** at the base.
  10. Enter **End Date**, **Reason for Joining** and **Reason for Leaving** information as required.
  11. Click the **Save** button to save your changes.

## Editing a Student's School History

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student History** tab and then open the **School History** section to view the selected student's school history.

Applications Summary	Student Basic Details	Special Needs	Student Additional	Student History	Carers	Relocation	Public Care																				
Wide View   Open All   Close All																											
<p>▼ <b>School History</b> + Add</p> <table border="1"> <thead> <tr> <th>Base Name</th> <th>LA No</th> <th>Sch No</th> <th>Reg Type</th> <th>DPW</th> <th>Registered</th> <th>Guest</th> <th>Residential</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>Leagrave Junior School</td> <td>820</td> <td>2080</td> <td>MN-S</td> <td>5</td> <td>Yes</td> <td>No</td> <td>No</td> <td>10/05/2019</td> <td></td> </tr> </tbody> </table>								Base Name	LA No	Sch No	Reg Type	DPW	Registered	Guest	Residential	Start Date	End Date	Leagrave Junior School	820	2080	MN-S	5	Yes	No	No	10/05/2019	
Base Name	LA No	Sch No	Reg Type	DPW	Registered	Guest	Residential	Start Date	End Date																		
Leagrave Junior School	820	2080	MN-S	5	Yes	No	No	10/05/2019																			

3. Click the **View & Edit full details** hyperlink next to the school history entry that you want to edit to view further details of the student's relationship to the school.

School History Details(Leagrave Junior School)  Edit	
Base Name:	Leagrave Junior School
LA No:	820
Sch No:	2080
Days Per Week:	5
Registered:	Yes
Dual Registered:	No
Guest:	No
Residential:	No
Registration Type:	MN-S - Main reg base, no dual
Start Date:	10/05/2019
End Date:	-
Reason for Joining:	-
Reason for Leaving:	-
Last Updated:	10/05/2019
Last Updated By:	System Administrator
Destination:	-
Destination Last Updated:	-
Destination Last Updated By:	System Administrator

4. Click the **Edit** hyperlink to make the school history information editable.



5. Make your changes.
6. Click the **Save** button to save your changes.

## Adding to the Address History

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student History** tab and then open the **Address History** section to view details of the student's address history.

Address	Start Date	End Date	Correspond
14 Adams Close, , Bedford, MK42	10/05/2019	dd/mm/yyyy	Yes

3. Click the **Add** hyperlink to display an editable blank record in the **Address History** list.

Address	Start Date	End Date	Correspondence	Address Type	Last Updated By	Last Updated Date	Memo
14 Adams Close, , Bedford, MK42	10/05/2019	dd/mm/yyyy	Yes	Home Address	SYSADMIN	13/05/2019 15:40:31	
Choose an address	dd/mm/yyyy	dd/mm/yyyy	No	Please select	-	-	

4. Select the address that you wish to add:
  - a. Click the **Choose an address** browse to display the **Address Manager** dialog.

Street Address	Country	USRN
----------------	---------	------

- b. Enter at least two characters of a postcode or address into the **Enter Post code or street address** field.

- c. Click the **Search** button to display a list of streets that match your search criteria.

The screenshot shows the 'Address Manager' window with a search box containing 'mk42' and a 'Search' button. Below the search box is a link to 'Add a new address'. A table displays search results with columns for 'Street Address', 'Country', and 'USRN'.

Street Address	Country	USRN
BARFORD AVENUE, BEDFORD, BEDFORDSHIRE, MK42 0DS,	UK	
BURNABY ROAD, BEDFORD, BEDFORDSHIRE, MK42 1GH,	UK	

- d. Select the required street to view a list of the dwellings located on that street.

The screenshot shows the 'Address Manager' window with the search box still containing 'mk42'. The 'Add a new address' link is present. The table from the previous screenshot is shown with 'BURNABY ROAD, BEDFORD, BEDFORDSHIRE, MK42 1GH,' selected. Below this, a new table displays dwellings for that street.

Dwelling	Telephone	Easting	Northing	UPRN	OSAPR
Green Abbey School	01234 876987	505206	250368		<a href="#">Edit</a>

- e. Highlight a dwelling and then click the **Select** button to select that address.

**NOTE:** If you cannot find the address you need, you can click the **Add a new address** hyperlink to add the address to the catalogue. For more information on adding addresses to the catalogue, see [Adding an Address to the Address Catalogue](#) on page 238.

5. Select the relevant **Address Type**.
6. Optionally, enter a **Start Date** and **End Date** for the student's time at the address.
7. If the address is the student's correspondence address, select the **Correspondence** check box.
8. Click the **Save** button to add the address to the student's address history.

## Editing the Address History

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student History** tab and open the **Address History** section to view details of the student's address history.

Address	Start Date	End Date	Correspondence
14 Adams Close, Bedford, MK42	10/05/2019	dd/mm/yyyy	Yes

3. Select the address that you wish to edit.

Address	Start Date	End Date	Correspondence
14 Adams Close, Bedford, MK42	10/05/2019	<input type="text"/>	Yes

2. Click a field to edit it. The **Address**, **Start Date**, **End Date**, **Correspondence** and **Address Type** fields are editable.
4. Click the **Save** button to save your changes.

## Recording a Student's EOTAS History

The **Students | All Students | Student History | EOTAS History** section enables you to record whether a child is or has been *Educated Other Than At School*.

**NOTE:** The **EOTAS History** tab is only displayed to Welsh Local Authorities.

1. Select a student. For more information on selecting students, see [Selecting a Student](#) on page 53.
2. Select the **Student History** tab and open the **EOTAS History** section to view details of the student's EOTAS status.

No records found for EOTAS History.

3. Click the **Add** button to add a new record to the **EOTAS History** table.



The screenshot shows a table titled "EOTAS History" with a green plus icon and an "Add" link. The table has two columns: "EOTAS" and "Date of Change". Below the table, there is a row with the value "No" under the "EOTAS" column, a date format "dd/mm/yyyy" under the "Date of Change" column, and a "Delete" button with a trash icon.

EOTAS	Date of Change
No	dd/mm/yyyy

4. Select the child's EOTAS status:
  - If you wish to record that the child now has EOTAS status, select the **EOTAS** check box.
  - If you wish to record that the child no longer has EOTAS status, de-select the **EOTAS** check box.
5. Enter a **Date of Change**.
6. Click the **Save** button to save your changes.

# 05 | Managing Transfer Groups

## Overview of Transfer Groups

A transfer group is a group of children who are applying to change school. A child must be a member of a transfer group in order for their school place application to be processed and an offer made.

Each transfer group is subdivided into sub groups. Sub groups give Local Authorities more granular control of inclusion in the offer processes, waiting lists, the oversubscription criteria and online parameters.

There are two types of transfer group: **Phased** and **In Year**.

### Phased Transfer Groups

Phased transfers are those transfers in which children move from one stage of compulsory education to another (for example primary to secondary or lower to middle). These transfers usually take place in September, and involve a change of school.

Features of a phased transfer group:

- The children are all in the same NCY (the Admissions Online public facing software uses a child's date of birth to determine which transfer group or groups they are eligible for).
- The children are all moving from one phase of compulsory education to another (for example primary to secondary or lower to middle), usually in September.
- There are multiple phased groups per academic year (at least one per phase change).
- All offers for a transfer group are made at the same time, on the appropriate National Offer Day for that phase.
- Each phased transfer group can consist of any number of sub groups, each with different oversubscription criteria and online settings.

For more information, see [Setting up Phased Transfer Groups](#) on page 80.

### In Year Transfer Groups

In year transfers are those transfers in which children move from one school to another outside the Normal Phased transfer times.

Features of an In Year transfer group:

- The children can be from any NCY.
- The children are changing schools outside the Normal Phased transfer times (e.g. due to a house move).
- A Local Authority has one In Year transfer group per academic year.
- Offers can be made at any time. If required, process periods can be used to define mini application rounds to process In Year admissions.
- Each In Year transfer group can consist of any number of sub groups, each with different oversubscription criteria and online settings.

For more information, see [Setting Up In Year Transfer Groups](#) on page 111.

## Sub Groups

Sub groups enable Local Authorities to coordinate all available school places at all admissions authorities. LAs can sub groups to define oversubscription criteria, special reason codes and some online parameters for individual schools or groups of schools within their transfer groups.

For example, an LA might use a sub group to manage Voluntary Aided schools. Voluntary Aided schools are the responsibility of another admissions authority, and might have different criteria to those schools for which the LA is the admissions authority.

It might be useful to create a separate sub group for each receiver school that uses banding or is its own admissions authority (OAA). This enables each school to set its own oversubscription criteria, special reason codes and sub group online parameters.

For more information, see [Setting up Sub Groups](#) on page 87.

## Setting up Phased Transfer Groups

### Introduction to Setting up Phased Transfer Groups

Phased transfer groups are set up via **Process | Transfer Groups**, either by setting up a new group from scratch or by copying an existing transfer group.

To set up a new phased transfer group, either:

- Select **Process | Transfer Groups | Add New Transfer Group** to create a new transfer group from scratch.  
For more information, see [Creating a New Phased Transfer Group](#) on page 80.
- Select **Process | Transfer Groups** and copy an existing transfer group. This method saves time if the sub groups and subscription criteria do not change much from year to year.  
For more information, see [Copying an Existing Phased Transfer Group](#) on page 81.

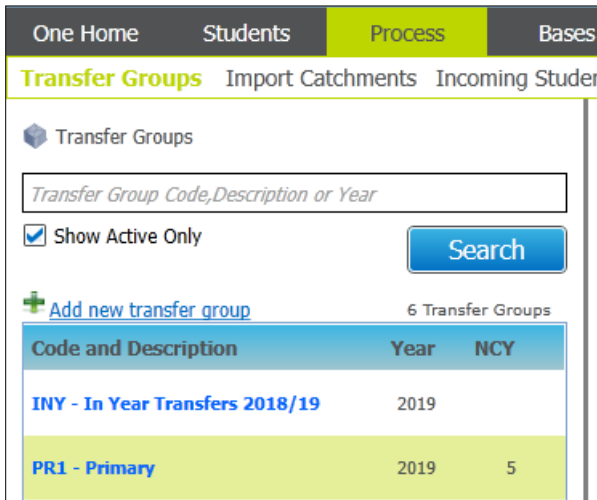
### Creating a New Phased Transfer Group

1. Add the basic transfer group details. See [Adding Basic Details \(Phased\)](#) on page 83.
2. Add coordinating Local Authorities, or edit copied LAs. See [Adding Coordinating Local Authorities](#) on page 84.
3. Add feeders. See [Adding Feeders](#) on page 85.
4. Add students. See [Adding Students to a Phased Transfer Group](#) on page 86.
5. Define sub groups or edit copied sub groups. See [Adding a New Sub Group](#) on page 87.
6. If the transfer group is to be made available for online applications, then add E-Application Settings. See [Adding E-Application Settings](#) on page 100.
7. If test scores are to be used as part of the allocation process, then associate tests with transfer groups. See [Defining and Associating Tests with a Transfer Group](#) on page 107.

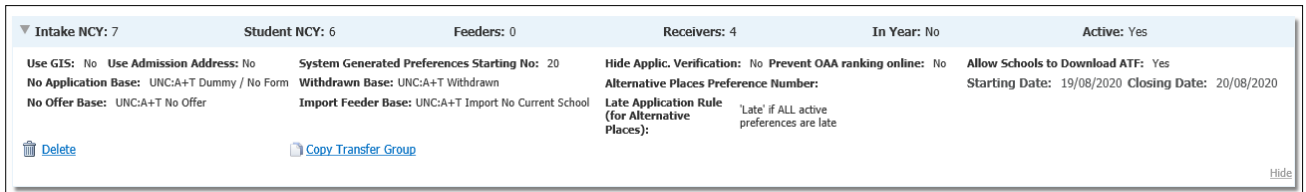
## Copying an Existing Phased Transfer Group

To copy an existing phased transfer group:

1. Select **Process | Transfer Groups** to display the list of transfer groups.

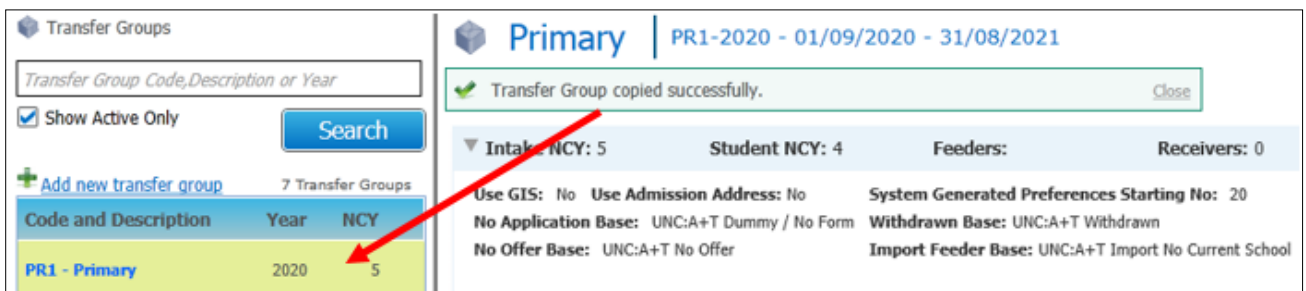


2. Select a phased transfer group to copy.
3. Click the grey arrow next to the **Intake NCY** field to display the details panel.



4. Click the **Copy Transfer Group** hyperlink.

A new transfer group is created with the same **Code** and **Description** as the original, and the **Year** field incremented by one.



**NOTE:** The combination of transfer group code and year must be unique. If there is already a transfer group in the next academic year with the same transfer group code as the selected transfer group, then you cannot create a copy.

5. Amend the **Description** and **Group Code** and make any other appropriate changes to the basic details. See [Adding Basic Details \(Phased\)](#) on page 83.

The following items are copied to the new transfer group during the copy process:

- Most of the basic transfer group details.
- All sub groups, including their special reason codes and online parameters.
- Feeders.

## Managing Transfer Groups

- Coordinating LAs.
- Most of the **E-Application Settings** information associated with the transfer group (including memo text and the online label for the transfer group).

The following items are not copied to the new transfer group:

- The setting of the **Use Admission Address** check box in the transfer group basic details.
- Any sub groups without receivers.
- The **E-Application Settings** dates.

## Selecting a Transfer Group

1. Select **Process | Transfer Groups** to display the Transfer Groups page. Search fields are available at the top of the left-hand panel.

Code and Description	Year	NCY
INY - In Year Transfers 2018/19	2019	
PR1 - Primary	2019	5

2. Optionally, enter a **Transfer Group Code, Description** or **Year** into the search field.
3. Click the **Search** button to display a list of transfer groups that match your search criteria.
4. Highlight a transfer group to select it.



## Adding Basic Details (Phased)

1. Select **Process | Transfer Groups** to display the **Transfer Group** page.

The screenshot shows the 'Transfer Groups' page with a search bar containing the placeholder text 'Transfer Group Code, Description or Year'. Below the search bar, there is a checked checkbox for 'Show Active Only' and a blue 'Search' button. At the bottom left, a red box highlights the '+ Add new transfer group' hyperlink. The page title is 'Transfer Groups' and it shows '7 Transfer Groups'.

2. Click the **Add New Transfer Group** hyperlink to display the basic details fields.

The screenshot shows the 'Add New Transfer Group' form. It includes fields for 'Transfer Group Description', 'Group Code', and 'Year - Start Date - End Date'. There are also fields for 'Intake NCY' and 'Student NCY'. The form has sections for 'Feeder:' and 'Receiver:' with dropdown menus. Checkboxes include 'Use GIS', 'Use Admission Address', 'In Year', and 'Active'. There are also fields for 'System Generated Preferences Starting No' (set to 20), 'Alternative Places Preference Number', and 'Late Application Rule (for Alternative Places)' (set to 'Late' if ALL active preferences are late). 'Cancel' and 'Save' buttons are at the bottom right.

3. Ensure that the **In Year** check box is deselected. If necessary, the In Year check box of an In Year transfer group can be deselected to convert it to a phased transfer group, although this is only possible if process periods have not yet been defined.
4. Complete the mandatory fields: **Transfer Group Description**, **Group Code**, **Academic Year** (academic years are added via v4 Client or v4 Bases), **Intake NCY** (the year the children will transfer into) and **Student NCY** (the year the children are currently in). There can only be one phased transfer group for each NCY and date combination.
  - The **Intake NCY** is used by the **Offer Scheme** processes to compare application numbers against the Published Admission Number (PAN), in order to allocate places in phased transfer groups.
  - The **Student NCY** is used by the **Student Selection** process, which adds students of the selected NCY to the transfer group.

**NOTE:** If the NCY routine in the v4 client's **Tools | Year Settings | NCY** menu is run to promote students to a new academic year, then the **Student Selection NCY** must be updated manually.

5. If required, select the **Use GIS** check box. Selecting this box causes One to measure distances using GIS and to calculate allocations using geocoded catchment polygons combined with the easting and northing of the student's address, rather than postcode catchments.
6. If required, select the **Use Admission Address** check box to use admission addresses instead of correspondence addresses (if different) when running the distance and catchment flagging processes.
7. Enter the starting number for Local Authority generated preferences into the **System Generated Preferences Starting No.** field.
8. If required, select the **Allow Schools to Download ATF** check box to display **Starting Date** and **Closing Date** fields. This will set the period(s) during which schools can download ATF files on the School Admissions Portal. This applies to Home LEA receivers only.
9. Select appropriate **No Application**, **Withdrawn**, **No Offer** and **Import Feeder** pseudo bases.
10. Ensure that the **Active** check box is selected.

- Click the **Save** button.

## Adding Coordinating Local Authorities

Coordinating LAs are LAs with which your LA has an agreement concerning the allocation of school places. For LAs in England this list must, at a minimum, include all English LAs.

- Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
- Select the **Coordinating LAs** tab to display a list of the coordinating LAs for the transfer group. If no coordinating LAs are selected then the **Add Coordinating LAs** hyperlink is displayed instead.

LA Name	LA No.
Cambridgeshire	873

- Click the **Edit** hyperlink (or the **Add Coordinating LAs** hyperlink if no coordinating LAs have been selected yet) to display a selectable list of LAs.

LA Name	LA No.
<input checked="" type="checkbox"/> Cambridgeshire	873
<input type="checkbox"/> 5. Belfast Library Board	5.
<input type="checkbox"/> Barking	301

- Enter part or all of the **LA Name** or **LA Number**.
- Click the **Search** button to display a list of LAs meeting the search criterion. Any LAs that have already been added to this transfer group are selected and listed first, followed by the other available LAs. The two sets of LAs are separated by a thick brown line.
  - Click the **Show Available First** hyperlink to move all the LAs that have not yet been selected (but that meet the search criteria) to the top.
  - Click the **Show Selected First** hyperlink to move the selected LAs back to the top of the list.
- Select or deselect the check boxes as appropriate.
- Click the **Save** button.
- If necessary, repeat the process to add more coordinating LAs.

**NOTE:** To edit an existing transfer group's coordinating LAs, select the **Coordinating LAs** tab and click the **Edit** hyperlink. The list of LAs becomes editable, enabling you to select or de-select LAs as required.

## Adding Feeders

Feeders are the schools that children currently attend. They are used during the student selection process to determine which children are added to phased transfer groups and from whom the LA (or the relevant Home LA) should expect an application.

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **Feeders** tab to display the group's feeders.

Base Name	LA	School No.	Base Type
Abbey Middle School	999	4001	Junior School
Ardley Hill Academy	820	2192	Academy (Primary)

3. Click the **Edit** hyperlink to display search fields related to feeders.

	Base Name	LA	School No.	Base Type

4. Enter the required search criteria for the feeders you wish to add to the transfer group.
5. Click the **Search** button to display a list of feeders that meet the search criteria.

If any of these feeders have already been selected for this transfer group then they are listed first with their check boxes selected, followed by the other available feeders. The two sets of feeders are separated by a thick brown line.

- Click the **Show Available First** hyperlink to display the feeders that have not yet been selected (but that meet the search criteria) at the top of the list.
  - Click the **Show Selected First** hyperlink to display the selected feeders at the top of the list (the default).
6. Select or deselect the check boxes to add or remove the feeders from the transfer group.
  7. Click the **Save** button.

## Adding Students to a Phased Transfer Group

Students can be added to phased transfer groups by:

- Running the **Student Selection** process.
- Adding an application manually via the **Students** area.
- Importing an online application and matching the imported student to a student in One who is not already in the transfer group.

### Phased Student Selection

**Student Selection** populates the transfer group by attaching a cohort of students to a transfer group based on that group's **Student NCY** and associated feeders.

Before adding students, ensure that as many of the students as possible have a correspondence address with a postcode and an LA attached, unless their address is flagged as **Overseas**.

1. Select **Process | Transfer Groups | Students | Student Selection** to display the **Add Students** button.

2. Click the **Add Students** button to run the process.
  - All students registered at the feeders and in the Student NCY select in **Transfer Group | Basic Details** are added to the transfer group.

- The number of students added successfully is displayed.
  - If any of these students have incomplete information (e.g. no post code recorded as part of their correspondence address) then they are added to the transfer group but are also recorded in an error log.
  - A Unique ID number (**UID**) is generated for each student.
3. If an error message is displayed, click the hyperlink in the message to view the error log.
- If receivers are to be allocated on the basis of catchment areas, any postcode errors must be corrected before using pre-offer processing. Any students with postcode errors are placed within the **No Application** base (from where they can be manually allocated via **Bases | Receivers | Preferences**) when pre-offer processing is run.

**Student Selection** can be run more than once, for example if new students have been registered at a feeder school or if new feeders have been added to the transfer group.

Any new students are added each time the process is run, and a count of these students is displayed.

If a student is added to the transfer group after this process has been carried out (e.g. by adding an application via the **Students** area), their UID is generated when they are added to a transfer group manually. If the student is then added to another transfer group, another, different, UID is generated for that student within the new transfer group. This ensures that the correct transfer group is located when an applicant enters the student's UID.

**NOTE:** Any students who reside in another LA are added to the transfer group during this process, but their applications must be made to their Home LA. LAs can advise other LAs of such students via the DfE APT (Admissions Pre-Transfer) schema file, which is generated via the **A&T v3 | Inter Authority Transfer** processes.

## Setting up Sub Groups

Sub groups enable the efficient coordination and resolution of all student places within a Local Authority.

In coordinate all available school places at all admissions authorities, LAs can define oversubscription criteria for specific sub groups of receiver schools within a transfer group. For example, an LA might set up a sub group for voluntary aided schools, which, being the responsibility of Own Admission Authorities (OAAs), might have different criteria to those schools for which the Local Authority is the admissions authority.

Each sub group has its own appropriate receivers, set of oversubscription criteria and special reason codes.

**NOTE:** LAs should consider setting up one sub group for each receiver. This enables oversubscription criteria to be defined separately for each school, thus enabling maximum flexibility if criteria need to be changed. Once set up, these groups can be copied from year to year using the **Copy Transfer Group** function.

## Adding a New Sub Group

1. Select the transfer group to which you want to add a new sub group. For more information on selecting transfer groups see [Selecting a Transfer Group](#) on page 82.
2. Select the **Sub Groups** tab to display a list of the sub groups within the selected transfer group.

Students	Tests	In Year	E-App Settings	Sub Groups (20)	Coordinating LAs	Feeder
<b>Sub Groups in this Transfer Group</b> <span style="float: right;">+ Add Sub-Group</span>						
Sub Group Name		No. Receivers	Edit Rank			
Academy		6	Yes	Delete	<a href="#">View Details</a>	
Applegreen		1	Yes	Delete	<a href="#">View Details</a>	

- Click the **Add Sub Group** hyperlink to display the **Add Sub Group** dialog.

**Add Sub Group** ✕

**Maintain Waiting List:**  
  **Edit Rank:**  
  **Use Feeder Link:**

**Use Flag Catchment:**  
  **Do Not Include In Offer Processing:**

**Hide in School Admissions Portal:**  
 [Close](#)
[Save](#)

- Enter a **Sub Group Name**.
- Select the appropriate check boxes:
  - If the **Maintain Waiting List** check box is selected, then the status of any children with applications to this sub group who have a **No Offer** status is changed to **Waiting List** when the Final Allocation routine is run.
  - If the **Edit Rank** check box is selected, then you are able to change the rank of students who have expressed preferences at the receiver bases for this sub group manually. Ranking is edited via **Manage Allocation | Offer Scheme**. These bases are Own Admissions Authorities (OAA).
    - If using the School Admission portal and are a Portal user who is mapped to OAA bases, only Applicant preference reasons will be shown for Catchment, Feeder and Distance.
    - If using the School Admission portal and are a Portal user who is mapped to non-OAA bases, only LA preference reasons will be shown for Catchment, Feeder and Distance.
  - If the **Use Feeder Link** check box is selected, then you can use the Feeder Receiver process to support allocation within this sub group.
  - If the **Use Flag Catchment** check box is selected, then you can use the GIS Catchment and Postcode Catchment processes to support allocation within the sub group.
  - If the **Do Not Include in Offer Processing** check box is selected, then schools within the Local Authority that are not part of coordination (for example, independent schools and pupil referral units) are ignored by the Make Offers and Resolve Offers routines. This setting makes those schools invisible in A&T Online.
  - If the **Hide in School Admissions Portal** check box is selected, then when a Portal user who is mapped to a base which is part of this Sub Group logs in they will not be shown any active applications for this base.
- Click the **Save** button to create the new sub group.
- Repeat steps 2-6 to add additional sub groups to the transfer group. New sub groups are added to the list on the **Sub Groups** tab. The number of sub groups added is indicated on the tab label.

**NOTE:** To edit sub group details or add **Application Statuses Displayed to Schools, Receivers, Oversubscription Criteria, Special Reasons or Additional Online Parameters**, click the **View Details** hyperlink.

## Editing Sub Group Details

1. Select the transfer group which contains the sub groups that you wish to edit. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **Sub Groups** tab to display a list of the sub groups within the selected transfer group.

Students	Tests	In Year	E-App Settings	Sub Groups (20)	Coordinating LAs	Feeders
<b>Sub Groups in this Transfer Group</b>						<a href="#">+ Add Sub-Group</a>
Sub Group Name		No. Receivers	Edit Rank			
Academy		6	Yes	<a href="#">Delete</a>	<a href="#">View Details</a> ▶	
Applegreen		1	Yes	<a href="#">Delete</a>	<a href="#">View Details</a> ▶	

3. Click a particular sub group's **View Details** hyperlink to view further details on that sub group.

**Sub Groups in this Transfer Group**

[Details](#) / [Edit](#)

**Pubs1**

Maintain Waiting List: Yes      Edit Rank: No      Use Feeder Link: No  
 Use Flag Catchment: No      Do Not Include In Offer Processing: No  
 Hide in School Admission Portal: No

- ▶ [Application Statuses Displayed to Schools](#)
- ▶ [Receivers](#) / [Edit](#)
- ▶ [Oversubscription Criteria](#) / [Edit](#)
- ▶ [Special Reasons](#)
- ▶ [Additional Online Parameters](#)

4. Ensure that the **Details** section is open and then click the **Edit** hyperlink to display editable fields relating to sub group details.

[Details](#) / [Edit](#)

Applegreen \*

Maintain Waiting List:       Edit Rank:       Use Feeder Link:   
 Use Flag Catchment:       Do Not Include In Offer Processing:   
 Hide in School Admissions Portal:

[Cancel](#)    [Save](#)

5. Make the required changes.
6. Click the **Save** button to save your edits.

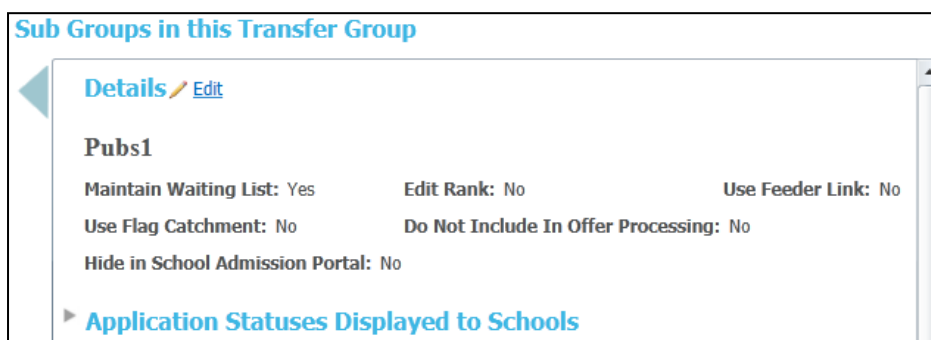
**NOTE:** To delete a particular sub group, navigate to the **Sub Groups** tab and click that sub group's **Delete** hyperlink.

## Application Statuses Displayed to Schools

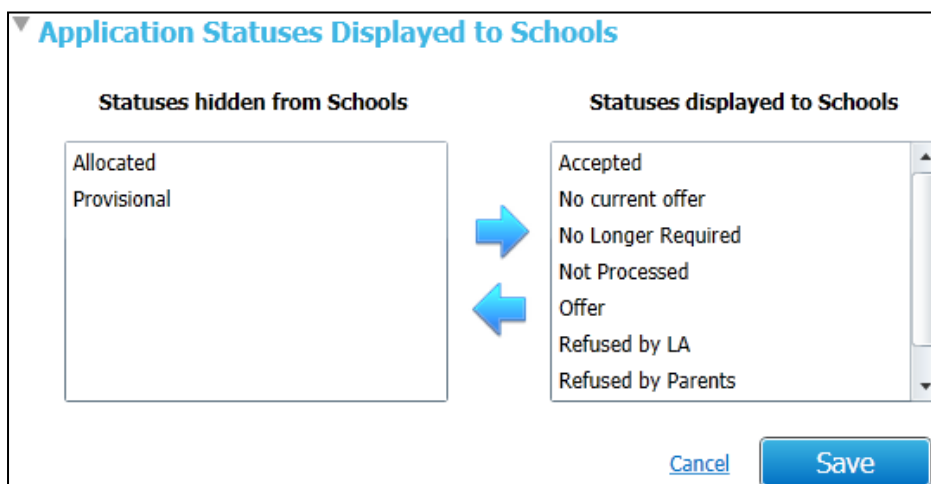
When viewing applications in the **School Admissions Portal**, the **Receiver Summary** panel displays offer statuses once the **Show Offers to Receivers** date is reached. If the **Show Offers to Receivers** date is not populated, then this is only available on and after the **Transfer Group Publicise** date.

To select which statuses are displayed in the School Admissions Portal:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Open the **Sub Groups** tab and click the **View Details** hyperlink for the selected sub group to display further information relating to that sub group.



3. Open the **Application Statuses Displayed to Schools** section to display selection fields relating to application statuses.



4. Select a status and use the arrows to display or hide the status in the School Admissions Portal.
5. Click the **Save** button to save your changes.



## Adding Receivers

Receivers are the schools children apply to. All receivers in a particular sub group have the same oversubscription criteria.

To add receivers to a sub group:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Open the **Sub Groups** tab to display a list of the sub groups within the selected transfer group.

Students	Tests	In Year	E-App Settings	Sub Groups (20)	Coordinating LAs	Feeders
<b>Sub Groups in this Transfer Group</b> <span style="float: right;">+ Add Sub-Group</span>						
Sub Group Name		No. Receivers	Edit Rank			
Academy		6	Yes	Delete	View Details ▶	
Applegreen		1	Yes	Delete	View Details ▶	

3. Click the **View Details** hyperlink for the sub group you wish to add receivers to in order to display further information relating to that sub group.

**Details** [Edit](#)

**Pubs1**

Maintain Waiting List: Yes      Edit Rank: No      Use Feeder Link: No

Use Flag Catchment: No      Do Not Include In Offer Processing: No

Hide in School Admission Portal: No

▶ **Application Statuses Displayed to Schools**

▶ **Receivers** [Edit](#)

4. Open the **Receivers** section and then click the **Edit** hyperlink to view search fields relating to receiver details.

**Receivers** [Edit](#)

Home LA   
  All Bases   
  Other LA

1 Receiver Bases **Search**

Base Name	LA	School No.	Base Type
<a href="#">Applegreen School</a>	820	4401	Academy

5. Optionally, enter search criteria for the schools you want to add as receivers:
  - Select whether you wish to search for **Home LA**, **Other LA**, or **All Bases**.
  - Enter a **Base Name or School No.**
  - Select a **Base Type** code (e.g. HIG - High School) from the **Base Type** drop-down menu.
  - Select a **Base Control** code (e.g. VA - Voluntary Aided) from the **Base Control** drop-down menu.
6. Click the **Search** button to display a list of receivers that meet your search criteria.

The screenshot shows the 'Receivers' interface with the following elements:

- Header: 'Receivers' with an 'Edit' link.
- Filter buttons: 'Home LA', 'All Bases' (selected), and 'Other LA'.
- Search input: 'Base Name or School No.' with a search button.
- Dropdowns: 'Base Type' and 'Base Control'.
- Text: '374 Bases matching "All Bases, Active Bases"'. A 'Search' button is also present.
- Table of receivers:

<input type="checkbox"/>	Base Name	LA	School No.	Base Type
<input checked="" type="checkbox"/>	Applegreen School	820	4401	Academy
<input type="checkbox"/>	A&T Out Of County Schools			
<input type="checkbox"/>	Abacus Nursesey School	999	2299	Nursery School/Unit

Any receivers that have already been selected for this sub group are listed first with their check boxes selected, followed by the other available receivers. The two sets of receivers are separated by a thick brown line.

- Click the **Show Available First** hyperlink to display the receivers that have not yet been selected (but that meet the search criteria) at the top of the list.
  - Click the **Show Selected First** hyperlink to display the selected receivers at the top of the list (the default).
7. Select or deselect the check boxes to add or remove receivers from the transfer group:
  8. Click the **Save** button to save your changes.

If necessary, you can repeat the process using different search criteria to add more receivers to the transfer group.

**NOTE:** A receiver can only be associated with one sub group for each transfer group.

## Oversubscription Criteria

Oversubscription or admissions criteria are used to decide which children are allocated places when schools are oversubscribed. They can be different for each receiver and are held against receivers via the sub groups with which they are associated. They are added to sub groups and assigned their order of priority via **Process | Transfer Groups | Sub Groups | View Details**.

- Some oversubscription criteria can be explicitly chosen by parents (e.g. **Religion, Siblings and Distance**). These are known as applicant's preference reasons.
- Some oversubscription criteria are used as preference reasons but cannot be explicitly chosen by applicants. They are implicit and are derived from information provided by the applicant (e.g. **Named School and Public Care**). These criteria are added automatically as preference reasons during the pre-offer processes.
- Some criteria are **LA Only** preference reasons, configured via **Applications | Application Details | View Reasons** (e.g. **Late Application and Test Mark**). These criteria are derived from imported data or manual input, rather than from information supplied by the applicants.

One A&T uses the following oversubscription criteria types:

### Catchment

**Catchment** can be selected as an applicant preference reason. It is automatically selected as an LA reason if **Use GIS** is selected for the transfer group and the student's address is within the catchment of the receiver base. This applies to both GIS and postcode catchments.

### Distance

**Distance from Home** can be selected as an applicant preference reason. If it is selected, the distance from the student's correspondence or admission address to the receiver is displayed in the **Applications | Application Details | View Reasons | LA Preference Reasons** column. Distances are calculated via **Process | Transfer Groups | Students | Pre-Offer Processing**, or via **Applications | Application Details | Calculate Catchments and Distances** for individual applications.

**NOTE:** The A&T processes can be run based on either correspondence address or admission address for each transfer group. This setting is specified by selecting the **Use Admission Address** check box on **Process | Transfer Groups | Details**. School places are allocated in ascending order of distance.

In most cases the admission address is the same as the current correspondence address. However there are some exceptions, such as returning service personnel or Crown Servants who are applying for a school place because of a confirmed future posting.

### Feeder Link

If a student's registered base is linked to the preferred receiver, then the **Feeder Link** check box in the **Application Details | LA Preference Reasons** panel is selected automatically after the **Feeder Receiver** process has been run (via **Process | Transfer Groups | Students | Pre-Offer Processing**). **Feeder Link** can be de-selected if required.

### Late Application

The treatment of late applications varies from authority to authority. Some LAs treat late applications as on time if they are late for a good reason (but are received before a specified date). Others exclude all late applications from the process. If **Late** is selected as an oversubscription criterion, then students whose applications were received on time are ranked higher than those whose applications were late.

If an application is submitted after the closing date for the transfer group or sub group, then the **Late Application** check box on the **Application Details | View Reasons | LA Only** panel should be selected. Selecting this check box means that the students in the application are included in a Late ADT file. When Make Offers is run, One offers you the opportunity to choose whether or not to include any late applications.

### Medical Reasons

Applicants can indicate that they wish to apply to a school on medical grounds. Local Authorities might request supporting information from the applicants who select this criterion.

### Named School

This criterion is applied automatically where an applicant has claimed that this is the school named on their statement of special needs.

### Preference

This criterion takes into account the preference rank number chosen by an applicant. Preference ranks greater than 20 or the **Process Start Number** defined in **Process | Transfer Group** are Local Authority-generated preference ranks.

## Public Care

This criterion indicates that an applicant has stated that the student is in public care. The applicant must also select the name of the Care Authority. This information is imported with the preference and can be edited.

## Pupil Premium

This criterion takes into account whether or not the student attracts the Pupil Premium. This must be verified by the Local Authority.

## Religion

This criterion can be selected by applicants (using the **Faith School** parental reason) to indicate that they are applying to a faith school on religious grounds. Use the lookup table to select the faith of the school.

## Siblings

This criterion enables an applicant to indicate that the student has a sibling currently attending the receiver school or a linked or partner receiver. Partner schools are those schools that are linked for admissions purposes (e.g. a girls' school that has a partner boys' school). The details of the sibling and, if they attend a partner school, the school number, are entered by the applicant.

## Social Reasons

Applicants can indicate that they wish to apply to a school for social reasons. Local Authorities might request supporting information from applicants who select this criterion.

## Special Reasons

Local Authorities can define up to three special reasons, assigning them a position in the selection criteria priority order. Each special reason is made up of a group of codes with allocated weightings. These codes are used during the allocation process to rank the students.

- Special reasons are defined and weighted according to points assigned on the **Administration | Applications | Special Reasons** tab.
- Special reasons and their groups of codes are added to sub groups on the **Process | Transfer Groups | Sub Groups** tab.

A group of codes with assigned weightings can be chosen within each special reason. Student ranking is carried out first according to the special reason and then by the weighting of the codes within the reason, with a weight of 1 being the highest priority.

For more information on defining special reasons, see

[Setting Up Special Reasons](#) on page 96.

For more information on defining special reason codes, see [Configuring Special Reason Codes](#) on page 264.

## Staff Child

This criterion takes into account whether or not the child is a child of a member of staff working at the preference school. This information must be verified by the Local Authority.

## Test Mark

Test results (the **Entrance Test** parental reason) can be used as a selection criterion by Admission Authorities with selective schools, and by those using ability or fair banding. Tests are defined in the v4 Client via **Tools | Administration | Lookups | Table ID 0421** and are associated with transfer groups and the results imported and processed on the **Process | Transfer Groups | Tests** tab.

For more information on defining tests, see [Defining and Associating Tests with a Transfer Group](#) on page 107.

For more information on importing or editing test results, see [Importing Test Results](#) on page 109.

## Configuring Oversubscription Criteria

Oversubscription criteria are selected for a sub group via the **Oversubscription Criteria** section of the **Sub Group Details** section.

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Open the **Sub Groups** tab and click the **View Details** hyperlink for the sub group that you wish to define oversubscription criteria for to display further information relating to that sub group.

- ▶ **Application Statuses Displayed to Schools**
- ▶ **Receivers** [Edit](#)
- ▶ **Oversubscription Criteria** [Edit](#)

3. Open the **Oversubscription Criteria** section and then click the **Edit** hyperlink to display selection fields relating to oversubscription criteria.

▼ **Oversubscription Criteria** [Edit](#)

<input type="checkbox"/> Catchment	<input type="checkbox"/> Distance	<input type="checkbox"/> Feeder Link
<input type="checkbox"/> Late Application	<input type="checkbox"/> Medical	<input checked="" type="checkbox"/> 1 Named School
<input type="checkbox"/> Preference	<input checked="" type="checkbox"/> 2 Public Care	<input type="checkbox"/> Pupil Premium
<input type="checkbox"/> Religion	<input type="checkbox"/> Siblings	<input type="checkbox"/> Social
<input type="checkbox"/> Special Reason Weighting 1	<input type="checkbox"/> Special Reason Weighting 2	<input type="checkbox"/> Special Reason Weighting 3
<input type="checkbox"/> Staff Child	<input type="checkbox"/> Test Mark	

4. Enter the priority order number for each criterion you wish to use.

**NOTE:** The priority order must start at 1 (highest priority) and use consecutive numbering.

5. Click the **Save** button to save the oversubscription criteria.

**IMPORTANT NOTE:** Amending the oversubscription criteria after the offer routines have been run resets the existing preference allocations. For In Year transfer groups, this resets allocations for all students who do not have an application status of **CLOS (Closed/Completed)**.

## Setting Up Special Reasons

You can use up to three special reasons as extra oversubscription criteria. Special reasons enable Local Authorities to define and prioritise criteria that are more precise than standard oversubscription criteria. For example, special reasons could be used to distinguish between different medical reasons.

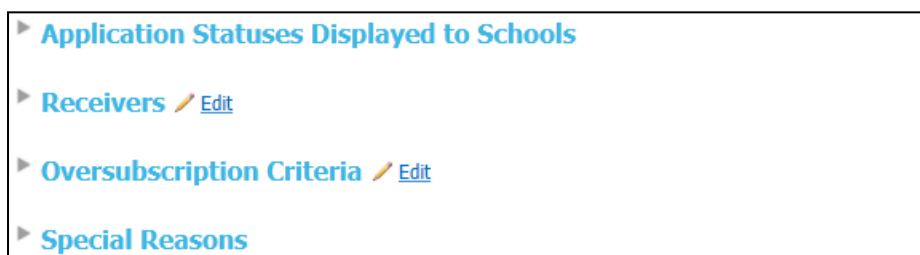
A group of codes can be added within each special reason. For example, a special reason of **Medical Reasons** might consist of a list of different medical reasons, all with weights assigned. Ranking proceeds according to the priority order of the special reasons within the selection criteria, then by the weight of the codes within the reasons. A weight of 1 has the highest priority.

Special reasons are configured in four steps:

1. Select up to three special reasons as oversubscription criteria via **Process | Transfer Groups | Sub Groups | Sub Group Details | Oversubscription Criteria**. For more information on this process, see [Configuring Oversubscription Criteria](#) on page 95.
2. Define the special reason codes and allocate them to the master list for each special reason via **Administration | Applications | Special Reasons**. For more information on defining special reason codes, see [Configuring Special Reason Codes](#) on page 264.
3. For each special reason that has been selected as an oversubscription criterion, add codes from the master lists via **Process | Transfer Groups | Sub Groups | View Details | Add Codes**. These codes are available for selection during the application process. For more information on selecting special reason codes, see [Selecting Special Reason Codes](#) on page 96.
4. [Selecting Special Reason Codes](#) on page 96.
5. For each special reason that is available to online applicants, add a label and description to enable those applicants to choose the most appropriate code. For more information on this process, see [Adding Online Special Reason Labels and Descriptions](#) on page 97.

## Selecting Special Reason Codes

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Open the **Sub Groups** tab and click the **View Details** hyperlink for the sub group that you wish to define special reason codes for to display additional information relating to that sub group.



3. Open the **Special Reasons** section and then click the **Add Codes** hyperlink for the special reason you wish to define. The **Choose Special Reason Codes** dialog is displayed, listing all the codes that have been added to this special reason.

Code	Description	Weight	View O/L
<input type="checkbox"/> SP1	SEN	99	<input type="checkbox"/>
<input type="checkbox"/> SP2	SEN & Catchment	98	<input type="checkbox"/>
<input type="checkbox"/> SP3	Catchment & Sibling	97	<input type="checkbox"/>

4. Select the codes you wish to use using the check boxes.
5. If required, select the **View O/L** check box for each code that you wish to make viewable online.
6. Click the **Save** button to save your changes.

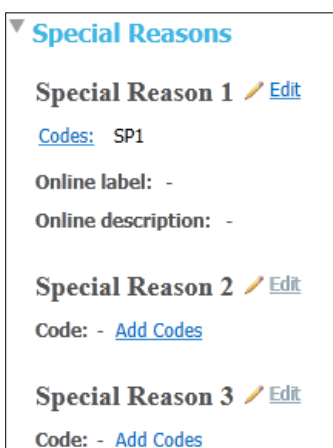
## Adding Online Special Reason Labels and Descriptions

If any of the special reasons are to be available for online applicants to select, you must add labels and descriptions.

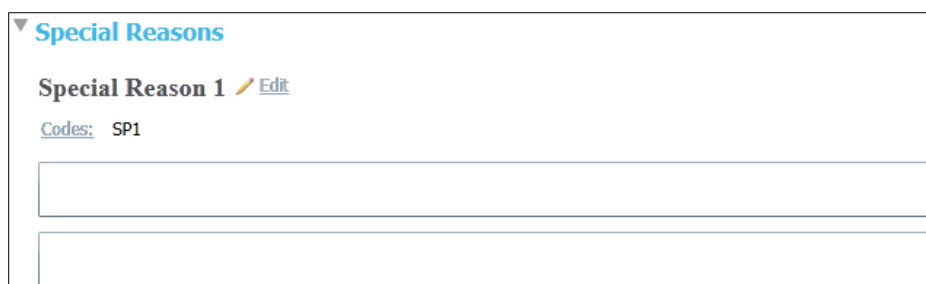
1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Open the **Sub Groups** tab and click a sub group's **View Details** hyperlink to display to display additional information relating to that sub group.



3. Open the **Special Reasons** section to display the available special reasons and their associated codes.



4. Click the **Edit** hyperlink for a particular special reason to display the **Label** and **Description** fields.



▼ **Special Reasons**

**Special Reason 1** [Edit](#)

Codes: SP1

5. Enter an appropriate **Label** and **Description**.
  - Avoid the use of any jargon, internal codes or abbreviations.
  - If more than one code has been added for a special reason, applicants must select a code from a drop-down list, so it may be appropriate to include this instruction in the description.
6. Click the **Save** button to save your changes.

## Configuring Additional Online Parameters

The **Additional Online Parameters** section of the **Sub Group Details** page enables you to set sub group-specific options that are displayed when an online applicant selects a receiver from that sub group. These options include online memo text and the preference reasons that are displayed online for applicants to choose.

All other online parameters are set for the Local Authority as a whole, and are managed via **Administration | Applications | Online Parameters**.

### Editing Online Memos

Four sub group-specific memos are available. These memos are displayed online to assist applicants when they are selecting preference reasons for a receiver.

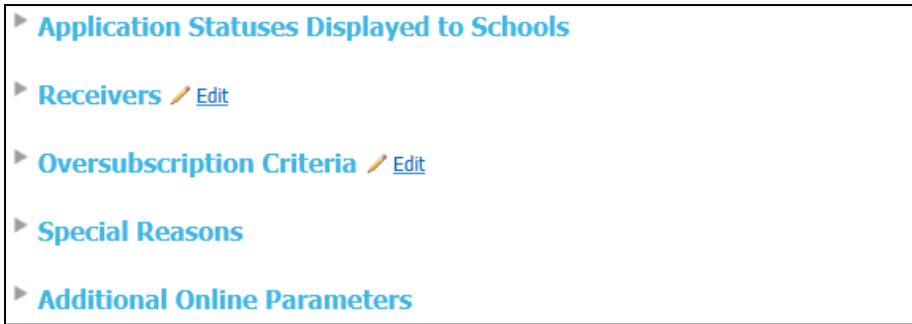
- **Medical Question:** This memo explains the Local Authority's policy regarding medical reasons, and informs applicants that they may need to supply extra evidence.
- **Other Reasons Supporting Text:** This memo explains that the applicant can select **Other Reasons** if their reasons for preference are not fully covered by the onscreen options, and informs them that they will be able to explain their reasons fully on the next page.
- **Oversubscription Criteria:** This memo gives an overview of the oversubscription criteria and explains how applicants should select them appropriately.
- **Sibling Question:** This memo contains the question that asks an online applicant whether or not their child has a sibling at the preferred school. Further text should be added to include your Local Authority's definition of who is considered to be a sibling for the purposes of school admissions.

Example: "Does your child have a sibling who will still be attending the school when your child starts?"

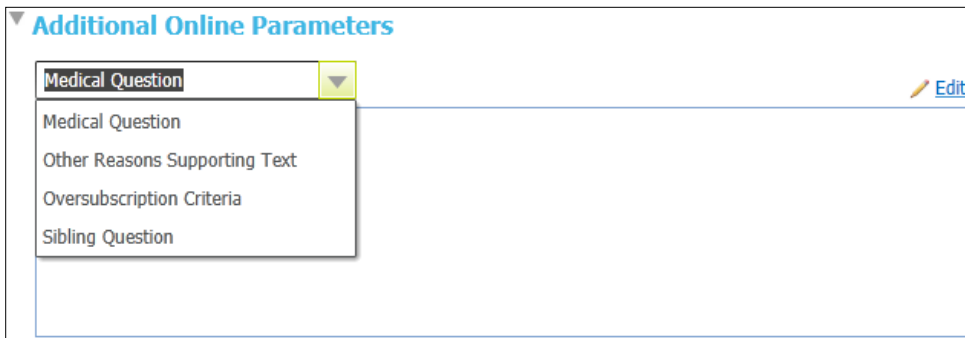
To configure online memos:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Open the **Sub Groups** tab and click the **View Details** hyperlink to view additional details for the sub group that you wish to configure online memos for.

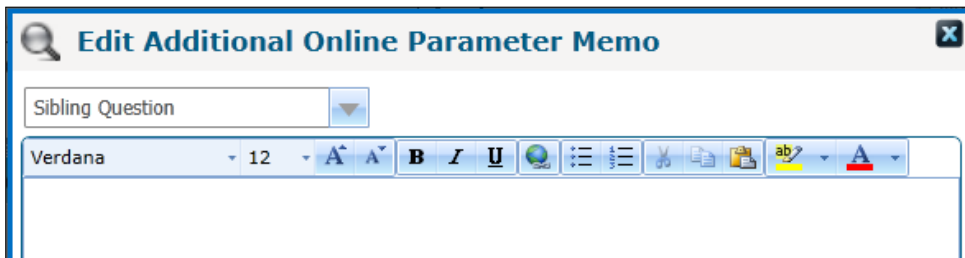




- Open the **Additional Online Parameters** section and select the required memo from the drop-down list.



- Click the **Edit** hyperlink to display the **Edit Additional Online Parameter Memo**.



- Enter and format a suitable message.
- Click the **Save** button to save the memo.

### Configuring Preference Reasons Displayed Online

This section of **Sub Group Details | Additional Online Parameters** determines whether or not each preference reason is available on screen for an applicant to select. The reasons correspond to the **Applicant Reasons** displayed in **Students | Applications | Application Details | Preferences | View Reasons**.

The **Other Reasons** memo is always displayed online.

**NOTE:** *Named School* is not available as a preference reason because this information is derived from the fact that the parent claims that their child has a statement.

To configure the preference reasons that One displays online:

- Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
- Open the **Sub Groups** tab and click the **View Details** hyperlink to view additional details for the sub group that you wish to configure preference reasons for.

▶ **Application Statuses Displayed to Schools**

▶ **Receivers** ✎ [Edit](#)

▶ **Oversubscription Criteria** ✎ [Edit](#)

▶ **Special Reasons**

▶ **Additional Online Parameters**

3. Open the **Additional Online Parameters** section and then click the **Edit** hyperlink located next to the **Preference Reasons Displayed Online** heading to display selectable check boxes defining whether each preference reason is available online.

**Preference Reasons Displayed Online** ✎ [Edit](#)

Sibling: <input checked="" type="checkbox"/>	Religion: <input type="checkbox"/>	Medical: <input checked="" type="checkbox"/>
Selective School: <input type="checkbox"/>	Specialist School: <input type="checkbox"/>	Catchment: <input checked="" type="checkbox"/>
Feeder Link: <input type="checkbox"/>	Social: <input checked="" type="checkbox"/>	Distance: <input checked="" type="checkbox"/>
Ease Of Travel: <input type="checkbox"/>	School Gender: <input type="checkbox"/>	
Do Not Consider For Mainstream: <input type="checkbox"/>	Staff Child: <input checked="" type="checkbox"/>	

**NOTE:** All the check boxes are selected by default, except **Staff Child**.

4. Select or deselect the check boxes as appropriate. If a check box is selected, the appropriate reason is displayed online for all receivers in the selected sub group.

If the **Do not consider for Mainstream** check box is selected, the reason is only displayed online for bases that use either Ability or Aptitude banding. If an applicant selects this option but has not indicated a specialist school (for Aptitude banding) or selective school (for Ability banding) as a reason for preference, a warning message is displayed.

5. Click the **Save** button to save your changes.

## Additional Tasks

### Adding E-Application Settings

Each transfer group can have different settings, which must be set before online applications open. In addition, sub group-level settings can be configured via **Process | Transfer Groups | Sub Groups | Additional Online Parameters**. For more information on setting up sub group-level settings, see [Setting up Sub Groups](#) on page 87.

Select the **E-App Settings** tab to display the following sections:

- **Basic Details:** Online labels, dates, online responses, the number of permitted preferences, the UID entry prompt and the display of the Moving House question.
- **Online Text:** Blocks of user defined text, displayed online and in emails. Welsh LAs can define these in English and Welsh.
- **Additional Questions:** Select and manage additional questions that will be asked of all applicants for this transfer group.
- **Additional Questions (subgroup default):** Select and manage additional questions that will be asked of all applicants selecting particular schools as identified by their subgroup
- **Supporting Evidence**

## Editing Basic Details

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **E-App Settings** tab.

The screenshot shows the 'E-App Settings' tab selected. Below the tab are five expandable sections, each with an 'Edit' link:

- Basic Details [Edit](#)
- Online Text
- Additional Questions [Edit](#)
- Additional Questions (subgroup default) [Edit](#)
- Supporting Evidence [Edit](#)

3. Open the **Basic Details** section and then click the **Edit** hyperlink to make the transfer group's online application details editable.

**Note:** Different sets of fields are displayed for in-year and normal phased transfer groups.

The screenshot shows the 'Basic Details' section in edit mode. The fields and their values are:

- Transfer to Secondary September 2019 \*
- Start Date: 01/09/2018 \*
- Closing Date: 09/03/2019
- Publicise Date: 18/03/2019 \*
- Enable Parent/Carer Response Online:
- Start Date: 28/03/2019 \*
- End Date: 23:59
- Publicise Date: 29/03/2019 \*
- Enable Parent/Carer Appeal Request Online:
- Maximum Preferences Allowed Per Application: 3
- Preference School search on Home LA Receivers only:
- Prompt For Entry Of UID In Online Form:
- Ask Parent For Moving Address & Date:
- Request Council Tax Reference Online:
- Import Resubmitted Applications Automatically (Overwrite Back Office Applications):

4. Make your edits. The available fields are:
  - **Online Label for Transfer Group:** The transfer group name displayed in the A&T Applications and public facing A&T Online software. This label should be unambiguous, avoiding the use of internal codes or abbreviations.
  - **Starting Date:** The date on which applications for the transfer group open.
  - **Closing Date:** The date on which applications for the transfer group close.
  - **Publicise Date (Phased Transfer):** The date on which offers are published online and applicants are emailed with their offer. This field is mandatory if the **Enable Parent/Carer Response Online** checkbox is selected.

- **Receiver Publicise Date (Phased Transfer):** The date on which receivers can view the students that have been allocated to their school in the Provider Portal.
- **Enable Parent/Carer Response Online (Phased Transfer):** Enables applicants to record their offer responses. Additional fields are displayed if this check box is selected. Follow the process below to configure parental responses:
  - i. Enter a **Response Closing Date**. Once this date has passed, applicants will no longer have the option to respond.
  - ii. Enter an **Import Response Date**. This is the date that responses are imported into One.
  - iii. Enter a **Publicise Date**. This must be before the **Response Closing Date**.

**NOTE:** If required, you can configure response reminder emails via **Administration | Applications | Online Parameters | Reminder Email Scheduling**.

- **Enable Progress/Status Updates via Citizen Portal (In Year Transfer):** Enables applicants to view the progress/status of an application.
- **Maximum Preferences Allowed Per Application:** The maximum number of preference schools that can be selected for this transfer group.
- **Preference School search on Home LA Receivers only:** If this flag is selected, then applicants can only search for Home LA receivers when using the Citizen Portal.

When a transfer group is copied to the next academic year, the **Preference School search on Home LA Receivers only** setting is copied to the new transfer group.

- **Prompt For Entry of UID In Online Form:** When this check box is selected, online applicants are asked to enter the child's UID.
- **Ask Parent For Moving Address & Date:** Displays the **Moving Date** question in the online form, enabling applicants to enter their new address and date of their move (if applicable).

If the child currently lives outside the LA to which they are applying but is part of a returning Crown Servant or Service family and can provide official written confirmation that they are moving into the area before they start the new school, their new address must be used for the admissions assessment.

- **Request Council Tax Reference Online:** Enables applicants to enter their council tax reference number into the online form.
- **Import Resubmitted Applications Automatically (Overwrite Back Office Applications):** Enables the automatic import of online applications that have been changed and resubmitted. The existing applications are overwritten and their status is set to **Not Verified**.

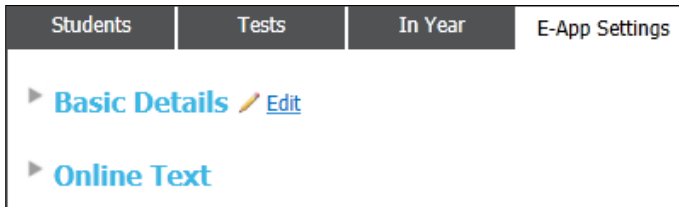
If this option is not selected, resubmitted online applications are displayed in **Process | Incoming Applications | Multiple Applications** and must be resolved manually.

- **Allow applicants to have multiple simultaneous open in-year applications for a student (In Year Transfer):** If selected, enables applicants to create multiple open in-year applications for a student. If not selected, then the applicant is prompted to either close or edit the existing application if they attempt to make a new in-year application when one is already open.
- **Allow citizens to remove In-Year applications (In Year Transfer):** If selected, enables applicants to remove in-year applications via the Citizen Portal. If not selected, then the **Close Application** hyperlink is not displayed to applicants in the Citizen Portal.

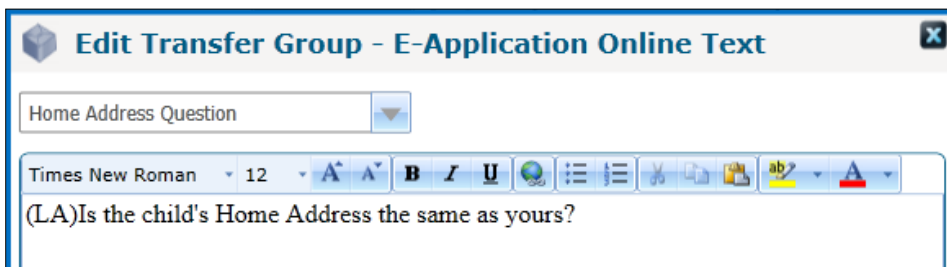
5. Click the **Save** button to save your changes.

## Editing Online Text

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **E-App Settings** tab.



3. Open the **Online Text** section and then click the **Edit** hyperlink to display the **Edit Transfer Group - E-Application Online Text** dialog.



4. If your LA is Welsh, select whether you want to edit the English or Welsh text using the left-hand menu. This option is not displayed to English LAs or EANIs (Northern Ireland).
5. Select the online text that you wish to edit from the right-hand menu. The following online text areas are available:

- **Home Address Question:** Asks whether the child’s and applicant’s home addresses are the same.

English example: “Is the child’s Home Address the same as yours?”

Welsh example: “Â yw cartref y plentyn yr un a’ch un chi?”

- **In Year Transfer Process Description:** Describes the Local Authority’s process for In Year applications. This text is displayed after an applicant has selected the In Year transfer group and before the **Date Place Required** field is displayed.

**NOTE:** This item is displayed for In Year transfer groups only.

- **Medical Question:** the description of the medical preference reason that is displayed to applicants. This text is only displayed if **Medical Reason** is selected as an oversubscription criterion.

If **Medical Reason** text is defined at the sub group level (via **Process | Transfer Groups | Additional Online Parameters**), then that text overrides any text entered here. If no text is entered in either location, a default question is displayed.

- **Moving Date Text:** The question that is displayed on the **Child's Address Details** page asking if the child will move house before they start at their new school. Service or Crown Servant families who are moving as a result of a confirmed posting must have their future address taken into account, but in other cases Local Authorities can use their discretion.  
English example: "If you are moving from the above address, please supply a moving date".  
Welsh example: "Os ydych yn symyd o'r cyfeiriad uchod, rhowch y dyddiad."
  - **Offer Information:** This text block is included in the offer email, above the list of preferences. These emails are sent to applicants after the offers have been generated and the Publicise date has passed, to inform them of their offers.
  - **Offer Response Confirmation:** This text block is included in the Offer Response emails, before the list of preferences. These emails are sent to applicants once they have completed the information on the Offer Information page, in order to confirm the receipt of their response to an online offer.
  - **Reminder to Response to Offer:** This text block is included as the first paragraph of the **Reminder to Respond to Offer** email. These emails are sent if the transfer group has the **Enable Online Parent / Carer Responses** check box selected (on **Process | Transfer Groups | E-Application Settings**) and there is a number of days entered in the **Parent/Carer Response Reminder Days** field (in **Administration | Applications | Online Parameters | Reminder Email Scheduling**).
  - **Reminder to Submit Application:** This text block is included as the first paragraph of the **Reminder to Submit Application** email. These emails are sent to applicants who have created applications but have not yet submitted them.
  - **Resubmission Reminder:** This text block is included at the beginning of the Resubmission Reminder email. These emails are sent to applicants who edited their application online after it was submitted, but did not resubmit their applications on the day that the edits were made.
  - **Resubmitted Application Confirmation:** This text block is included before the list of preferences in the **Resubmitted Application Confirmation** email. These emails are sent to applicants who have edited and resubmitted a Normal Phased application (In Year applications cannot be resubmitted) to confirm that the changes have been received.
  - **Sibling Question:** The question that is displayed on the **Admissions Online | Preference Reasons** page to ask if the child has a sibling who attends the preference school.  
English example: "Does your child have a sibling who will still be attending the school when your child starts?"  
Welsh example: "Oes gan eich plentyn frawd/chwaer a fydd dal yn mynychy'r ysgol pan mae'ch plentyn yn cychwyn?"
  - **Submission Confirmation:** This text block is included before the list of preferences in the Submission Confirmation email. These emails are sent to applicants who have submitted either a Normal Phased or In Year application.
6. Click the **Save** button to save your changes.

**NOTE:** For more information on group-level online applications settings, see the *Transfer Group E-App Settings reference guide*, available from the [One Publications](#) website.

## Editing Additional Questions

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82
2. Select the **E-App Settings** tab.
3. Open the **Additional Questions** section to display the description how to manage additional questions.

**Additional Questions (subgroup default)** [Edit](#)

**SEC - Primary to Secondary Transfer Group Additional Questions - Subgroup level**

This page allows you to select and manage additional questions that will be asked of all applicants selecting particular schools as identified by their subgroup.  
 Questions can only be selected from the "A&T transfer subgroup - preference level" sub library of the main questions library.

You will not be able to change any of the text of questions supplied, not the question type (format) here. You may be able to specify whether a response is mandatory or not and whether applicants can add any explanation to their answers or not **ONLY** if the questions have been set up in the main questions library to allow you to do so

Order	Question Title	Guidance Text	Question Type	Explanatory text requested	Active	Actions

[Select question\(s\) from library](#) [Preview All](#)

4. Click the **Select questions from library** button to display the **Question selector** dialogue.

**Question selector - A&T transfer sub group - preference level**

This page allows you to select questions from the question library for A&T transfer subgroups - preference level.  
 Place a tick in the left hand column of questions that you wish to appear as additional questions at preference level on the sub group which you are configuring.  
 You will be able to reorganise the questions into your preferred order once you have selected your questions. You will also be able to remove any questions later if you do not need them.  
 You can only select from questions marked as Active in the question library

<input type="checkbox"/>	Question Title	Guidance Text	Question Type	Explanatory Text Requested	Actions
<input type="checkbox"/>	Regious referee	If you are applying because of your child's faith who is your referee?	Tick box	Mandatory	<a href="#">Preview</a>

5. Select the question using the check box.  
 Clicking the **Preview** link displays the question in a new browser.
6. Click **Save and Return**. The additional question is added to the list.

## Editing Additional Questions (subgroup default)

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **E-App Settings** tab.
3. Open the **Additional Questions (subgroup default)** section to display how to manage additional questions for Subgroup level.

4. Click the **Select questions from library** button to display the **Question selector** dialogue.
5. Select the question using the check box.

Clicking the **Preview** link displays the question in a new window.

6. Click **Save and Return**. The additional question is added to the list.

## Editing Supporting Evidence

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **E-App Settings** tab.
3. Open **Supporting Evidence**. Click **Edit**.

Configuration options include maximum file sizes (1MB to 20MB), the number of files allowed per application (1 to 20 files), and the types of files accepted (from docx, doc, pdf, jpeg, jpg, bmp, png).



All files attached to applications in this manner will be checked for viruses, before being attached to the application.

Owing to the number of applications received, and the fact that these files must be stored and backed up appropriately, we recommend setting the file size and number of files values to be as low as possible for your process – photographs of evidence taken with a mobile device are typically smaller than 3MB, while we would recommend setting the number of files to the same number of active preferences for the transfer group.

4. Click the **Save** button.

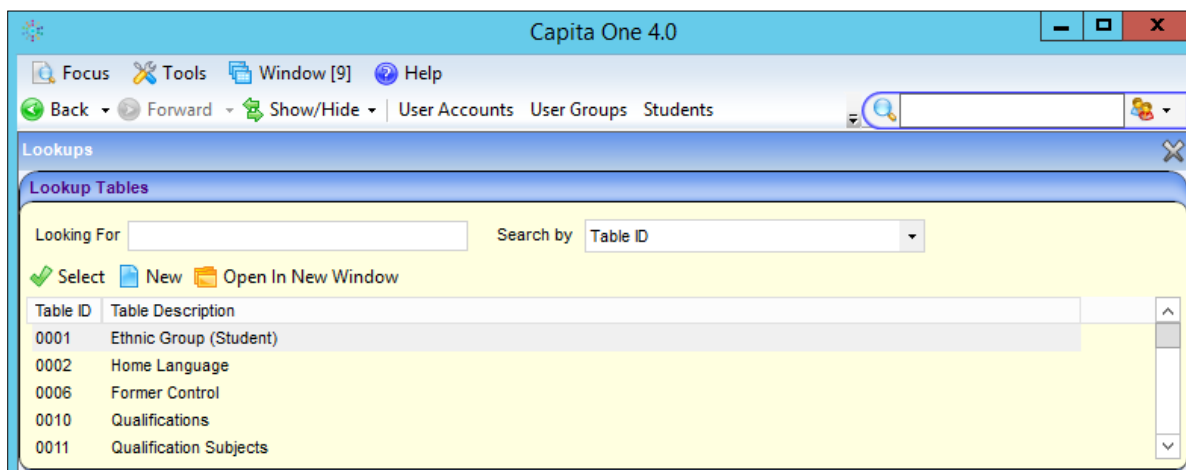
## Using Test Results as an Oversubscription Criterion

Admission Authorities with selective schools and those using ability or fair banding can use test results as a selection criterion by following these steps:

1. Select **Test Mark** as an oversubscription criterion via **Process | Transfer Groups | Sub Groups | Sub Group Details**. For more information on selecting oversubscription criteria, see [Configuring Oversubscription Criteria](#) on page 95.
2. Define tests by adding them in the v4 client's **Tools | Administration | Lookups** menu. For more information on defining tests, see [Defining and Associating Tests with a Transfer Group](#) on page 107.
3. Associate tests with the transfer group in A&T Back Office via **Process | Transfer Groups | Tests**. For more information on associating tests with transfer groups, see [Defining and Associating Tests with a Transfer Group](#) on page 107.
4. Import or add test results for the students in this transfer group. For more information on importing test results, see [Importing Test Results](#) on page 109.
5. Process the test results. For more information on processing test results, see [Processing Test Results](#) on page 110.

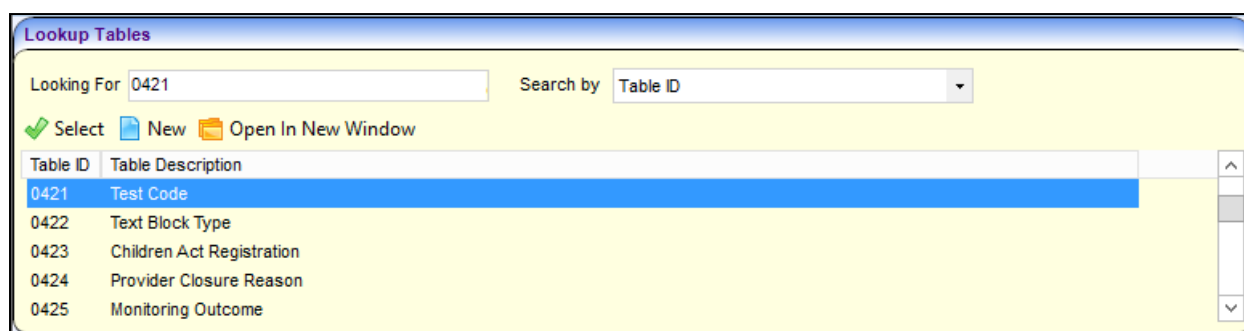
## Defining and Associating Tests with a Transfer Group

1. In One v4 Client, select **Tools | Administration | Lookups** to display the **Lookups** page.

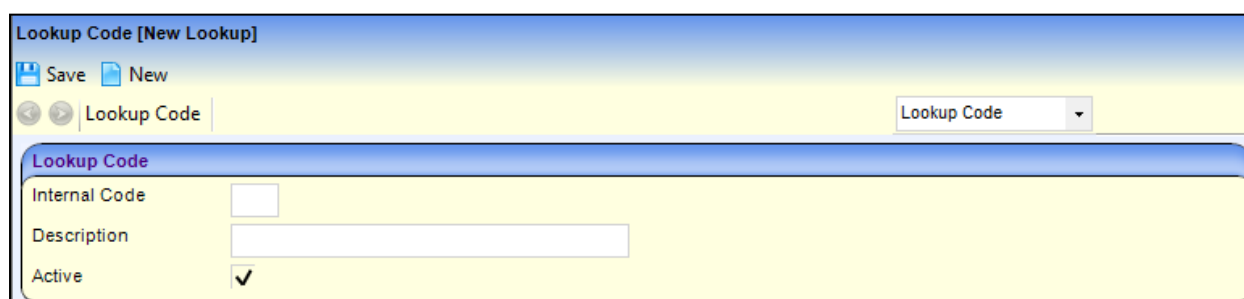


2. Highlight Table 0421 and then click the **Select** button to select that table.

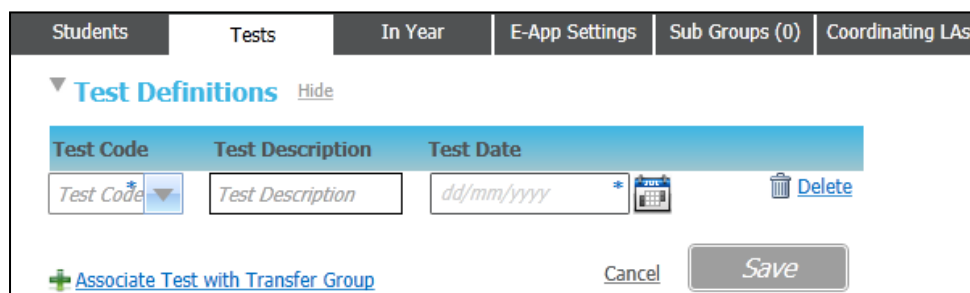
## Managing Transfer Groups



3. In the **Lookup Code** panel, click the **New** button to display editable fields relating to lookup codes.



4. Enter a new code:
  - a. Enter an **Internal Code** and **Description**.
  - b. Ensure that the **Active** check box is selected.
  - c. Click the **Save** button to save the code.
5. If required, repeat steps 3 and 4 to add additional new codes.
6. In A&T Back Office, select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
7. Open the **Tests** tab and then click the **Associate Test with Transfer Group** hyperlink to display editable fields relating to test details.



8. Select a code from the **Test Code** drop-down (the drop-down includes all active test codes). The **Test Description** is completed automatically.
9. Enter the **Test Date**. This can be in the future.
10. Click the **Save** button to associate the test definition with the transfer group.

## Importing Test Results

When test codes have been associated with a transfer group, the **Test Results** section is displayed at the top of the **Tests** tab, enabling the results to be imported or manually added.

**NOTE:** Test results for import must be in a .csv file containing: **Surname, Forename, DOB, UPN, Transfer Group Code, Transfer Group Year, Test Code, Results, Result Date and Student ID.**

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select the **Tests** tab and then open the **Test Results** section to display a list of imported test results.

The screenshot shows the 'Test Results' section within the 'Tests' tab. It features a navigation bar with tabs: Students, Tests, In Year, E-App Settings, Sub Groups (12), Coordinating LAs, and Feeder. Below the navigation bar, there is a 'Test Results' section with an 'Import Results' link and a 'Wide View' button. The main area contains two search filters: 'Current Base, LA, URN or School No.' and 'Receiver, LA or School No.'. Below these filters is a search bar with the placeholder text 'Find Student: Surname or Surname & Forename', a 'Clear Selection' button, and a 'Search' button. The results area shows '0 Students 2 Tests' and a table with the following data:

Name	Student ID	ENG	MAT
		31/01/2006	31/01/2006

3. In the **Test Results** section, click the **Import Results** hyperlink to display the **Import Results** dialog.

The screenshot shows the 'Import Results' dialog box. It has a title bar with a magnifying glass icon and the text 'Import Results'. Inside the dialog, there is a text input field with the placeholder text 'Select the import file' and a 'Browse...' button.

4. Click the **Browse** button to select the appropriate .csv file and then click the **Process** button to import the results.

The following validations and updates take place after you click the **Process** button:

- The file is validated against the details of the students in the transfer group. If any data fails validation, an error message is displayed.
- If a test result has already been recorded for a student in this transfer group, the result and result date are updated with the imported data.
- If a test result has not previously been recorded for a student, a new record is added.

The imported results are listed in the **Test Results** section. You can use filters (**Current Base Name, Current LA, URN, Current School No., Receiver Base Name, Receiver LA, Receiver School No., Student Surname** or **Student Surname and Forename**) to display a particular group or student's results.

Users with at least read/write permission for **Test Results - Manual Entry** can edit test results for individual students.

## Processing Test Results

The **Process | Transfer Groups | Tests | Process Results** section is displayed when at least one student in the transfer group has a test result recorded.

The following test result processing methods (or algorithms) are available:

- Average of All Tests
- Average of Best N Tests
- Customised Method
- Sum of all Tests
- Sum of Best N Tests
- Sum of Best Two Results

The value for N is entered in the **Process Results** panel.

To use a customised method, contact the One Service Desk

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select **Tests | Process Results** to display the **Process Results** fields.

The screenshot shows a navigation bar with tabs: Students, Tests, In Year, E-App Settings, and Sub Groups (12). Below the tabs, there are two expandable sections: 'Test Results' with a link to 'Import Results' and 'Process Results' with a 'Hide' link. Under 'Process Results', there is a 'Cut Off Mark' input field, a dropdown menu currently showing 'Average of all tests' with an asterisk, and a 'Process' button.

3. Select a **Processing Method**.
4. If the processing method includes N, an additional field is displayed for N. Enter the value of N.

This screenshot is similar to the previous one but shows the dropdown menu set to 'Average of Best N Tests' with an asterisk. An additional input field for 'N' with an asterisk is now visible to the right of the dropdown. The 'Process' button remains at the bottom.

5. If required, enter a **Cut Off Mark**.

**NOTE:** If no cut off mark is entered, all students are deemed to have passed when the results are processed.

6. Click the **Process** button. The following procedures are carried out:
  - The processing method uses the individual, imported test results to calculate an overall score (or **Test Result**) for each student to four decimal places.
  - The overall score is added to each student's **Application History**.
  - The counts of students who achieved the cutoff mark and those who did not achieve the cut off mark are displayed above the **Process** button.

This calculated overall score is displayed in the **Test** column in the following locations:

- The **Bases | Receivers** page (for selective receivers and receivers using ability or fair banding).

- The **LA Only Reasons** panel of **Students | Applications | Application Details | Preferences**.
- The **Assign Students to Selected Band** window of **Bases | Receivers | Preferences**.

The students' status is updated by the results processing as follows:

- Students who achieve the cut off mark are left as Not Processed, leaving them available for processing by the Make Offers routine.
- Students who do not achieve the cut off mark have their preference for the selective school set to Refused by LA, meaning that the Make Offers routine ignores the preference. These students re-enter the allocation process according to their preference details for nonselective schools.
- Students who have applied to an Ability Assessed band at a selective school, but do not achieve the cut off mark, are refused a place in the assessed band. However, they may still be considered for a place in a mainstream band at the same school.

## Reprocessing Test Results

Test results can be processed more than once. Reprocessing is necessary if any of the following conditions have occurred since the last time the routine was run:

- Any student results have been added or updated.
- The processing method calculation has been changed.
- The cut off mark has been changed.

Each student is reassessed based on the latest information. Preferences that were set to R (refused by Local Authority) by the original processing of test results are checked, to confirm whether or not that status is still correct according to the latest results and parameters.

This includes the following preferences:

- Home Local Authority preferences.
- Band preferences that are ability assessed.
- Band preferences linked to a parent band that is ability assessed.

**IMPORTANT NOTE:** *If you reprocess test results after changing the processing method or cut off mark, the existing results and offer status are overwritten.*

## Setting Up In Year Transfer Groups

In year transfers are those in which children move from one school to another outside the Normal Phased transfer times.

To set up a new In Year transfer group, either:

- Select **Process | Transfer Groups | Add New Transfer Group** to create a new transfer group from scratch. For more information, see [Creating a New In Year Transfer Group](#) on page 111.
- Select **Process | Transfer Groups** and copy an existing transfer group. This method is recommended by Capita when adding the initial In Year transfer group, to save time. For more information, see [Copying an Existing In Year Transfer Group](#) on page 112.

## Creating a New In Year Transfer Group

1. Select **Process | Transfer Groups** to display the **Transfer Groups** screen.

## Managing Transfer Groups

2. Click the **Add New Transfer Group** hyperlink to display editable fields relating to transfer group details.
3. Add transfer group basic details. For more information on adding basic details to In Year transfer groups, see [Adding Basic Details \(In Year\)](#) on page 114.

Note that:

- The **In Year** check box must be selected. Transfer groups with this check box selected support students of different ages from multiple NCYs in one transfer group.
  - **Intake NCY** and **Student NCY** are not used for In Year transfer groups.
4. Either add coordinating LAs or edit copied LAs. For more information, see [Adding Coordinating Local Authorities](#) on page 84.
  5. Either define new sub groups or edit copied sub groups. For more information, see [Setting up Sub Groups](#) on page 87.
  6. Define process periods and record vacancies. For more information, see [Process Periods and Vacancies](#) on page 117.
  7. Select feeder transfer groups. For more information, see [Adding Feeder Transfer Groups and Students](#) on page 114.
  8. Add students. For more information, see [Adding Feeder Transfer Groups and Students](#) on page 114.
  9. If the transfer group is to be made available for online applications, add e-application settings. For more information, see [Adding E-Application Settings](#) on page 100.
  10. If test scores are to be used as part of the allocation process, associate tests with transfer groups. For more information, see [Defining and Associating Tests with a Transfer Group](#) on page 107.

## Copying an Existing In Year Transfer Group

The following items are copied to the new transfer group when the Copy Transfer Group process is run:

- Most of the transfer group basic details.
- All sub groups, the sub group **Special Reason Codes** and sub group **Online Parameters**.
- Feeders.
- Coordinating Local Authorities.
- Most of the **E-Application Settings** information associated with the transfer group (including memo text and the **Online Label** for the transfer group).

The following items are not copied to the new transfer group:

- The setting of the **Use Admission Address** check box in the transfer group basic details.
- Process periods. These are year specific and so do not apply to the new transfer year.
- Any sub groups without receivers.
- The **E-Application Settings** dates.

To copy an In Year transfer group:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Click the grey arrow next to the **Intake NCY** field to display the details panel.

**In Year 2014** | 11Y-2014 - 01/09/2014 - 31/08/2015

Intake NCY: Student NCY: Feeders: 6 Receivers: 5 In Year: Yes Active: Yes

Use GIS: No Use Admission Address: No System Generated Preferences Starting No: 20 Hide Applic. Verification: No Prevent OAA ranking online: No Allow Schools to Download ATF: Yes  
 No Application Base: UNC:A+T Dummy / No Form Withdrawn Base: UNC:A+T Withdrawn Alternative Places Preference Number:  
 No Offer Base: UNC:A+T No Offer Import Feeder Base: UNC:CP+FSM Dummy Base Late Application Rule (for Alternative Places): 'Late' if ALL active preferences are late

Delete Copy Transfer Group

3. Click the **Copy Transfer Group** hyperlink.
4. A new transfer group is created, with the **Year** field incremented by one.

Transfer Groups

Transfer Group Code, Description or Year

Show Active Only Search

Add new transfer group 8 Transfer Groups

Code and Description	Year	NCY
IN Y - In Year Transfers 2018/19	2020	

In Year Transfers 2018/19 | INY-2020 - 01/09/2020 - 31/08/2021

Transfer Group copied successfully. Close

Intake NCY: Student NCY: Feeders: Receivers: 0

Use GIS: No Use Admission Address: No System Generated Preferences Starting No: 20  
 No Application Base: UNC:A+T Dummy / No Form Withdrawn Base: UNC:A+T Withdrawn  
 No Offer Base: UNC:A+T No Offer Import Feeder Base: UNC:A+T Import No Current School

**NOTE:** The combination of transfer group code and year must be unique. If there is already a transfer group in the next academic year with the same transfer group code as the selected transfer group, then you cannot create a copy.

5. Click the **Edit** hyperlink to make the new transfer group's details editable.

AInYearTransferGroup A1Y 2019 - 01/09/2019 - 31/08/2020

Intake NCY Student NCY Feeders: Receivers: 0 In Year  Active

Use GIS  Use Admission Address  System Generated Preferences Starting No: 20 Hide Applic. Verification  Prevent OAA ranking online  Allow Schools to Download ATF

UNC:A+T Import No Current School UNC:A+T Withdrawn Alternative Places Preference Number: 10

UNC:A+T No Offer UNC:CP+FSM Dummy Base Late Application Rule (for Alternative Places): 'Late' if ALL active preferences are late

Cancel Save

6. Select the **In Year** check box, amend the **Description** and **Group Code** and make any appropriate changes to the basic details. See [Adding Basic Details \(In Year\)](#) on page 114.
7. Click the **Save** button.

## Adding Basic Details (In Year)

1. Select **Process | Transfer Groups** and then click the **Add New Transfer Group** hyperlink to display editable fields relating to transfer group details.

2. Select the **In Year** check box. If necessary, a phased transfer group can be converted to an In Year transfer group by deselecting the **In Year** check box and clicking the **Save** button. This can only be done if there are no students in the transfer group.
3. Complete the mandatory fields: **Transfer Group Description**, **Group Code** and **Academic Year**.

**NOTE:** Academic Years are added via v4 Client or v4 Bases. There can only be one In Year transfer group per academic year.

4. Select the **Use GIS** check box to measure distances using GIS and calculate allocations using geocoded catchment polygons combined with the easting and northing of the student's address, rather than postcode catchments.
5. Select the **Use Admission Address** check box to use admission addresses instead of correspondence addresses (if different) when running the distance and catchment flagging processes.
6. Enter the starting number for Local Authority generated preferences into the **System Generated Preferences Starting No.** field.
7. Select the **Hide Applic. Verified** check box to omit the **Application Verified** indicator from **Students | Applications | Application Details**.
8. If required, select the **Allow Schools to Download ATF** check box to display **Starting Date** and **Closing Date** fields. This will set the period(s) during which schools can download ATF files on the School Admissions Portal. This applies to Home LEA receivers only.
9. Select appropriate **No Application**, **Withdrawn**, **No Offer** and **Import Feeder** pseudo bases.
10. Ensure that the **Active** check box is selected.
11. Click the **Save** button to save your changes.

## Adding Feeder Transfer Groups and Students

Students can be added to In Year transfer groups by:

- Running the **In Year Student Selection** process.
- Adding an application manually via the **Students** area.
- Importing an online application and matching the imported student to a student in One who is not already in the transfer group.



## In Year Student Selection

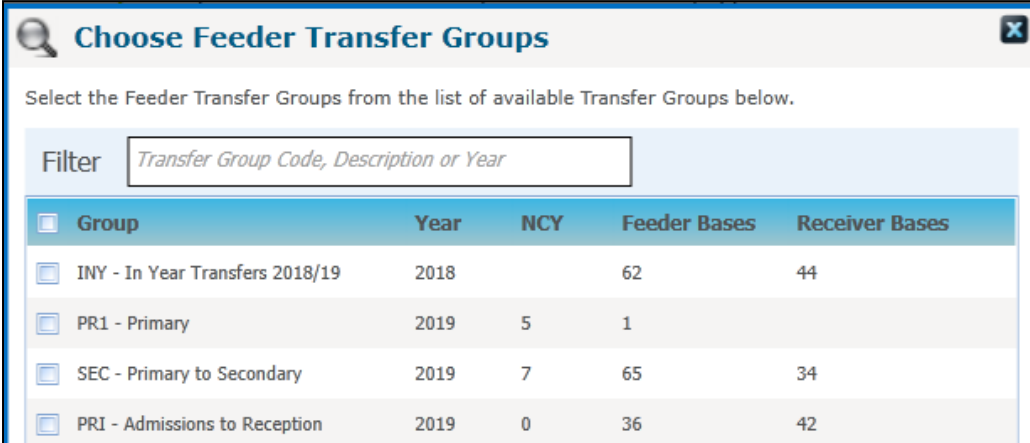
The In Year student selection process is carried out at the beginning of the academic year. It carries the following groups of students forward to the current In Year transfer group:

- Home LA students on a waiting list in selected Normal Phased transfer groups from the previous academic year.
- Any students with incomplete, outstanding applications from the previous year's In Year transfer groups.

Feeder transfer groups must be selected for In Year transfer groups before the **In Year Student Selection** process can be run.

**NOTE:** Before running **Student Selection**, ensure that as many students as possible have a correspondence address with a postcode, unless their address is flagged as **Overseas**.

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Select **Students | Student Selection** and click the **Edit Feeder Transfer Groups** hyperlink to display the **Choose Feeder Transfer Groups** dialog.



Group	Year	NCY	Feeder Bases	Receiver Bases
IN Y - In Year Transfers 2018/19	2018		62	44
PR1 - Primary	2019	5	1	
SEC - Primary to Secondary	2019	7	65	34
PRI - Admissions to Reception	2019	0	36	42

The list of groups is determined by the academic year of the new (receiver) In Year transfer group. It includes:

- The In Year transfer group from the academic year before the new In Year transfer group.
  - Phased transfer groups from the academic year before the new In Year transfer group.
3. If necessary, filter the list by **Code**, **Description** or **Year**.
  4. Select:
    - all the phased groups for the year that has just finished or is about to finish.
    - all the phased groups for the current In Year group.
  5. Click the **Select** button to return to the **Students** tab.

0 student in this Transfer Group

**Student Selection** [Hide](#)

To populate the In Year transfer group with students on a waiting list from normal phased transfer groups, as well as any incomplete in year application from last year, choose the feeder transfer groups by clicking on 'Edit Feeder Transfer Groups' and choose whether you wish to carry forward applications for Home LA students only or Home and Other LA students.

**Warning** - This routine can only be run once. Please ensure that you have selected all of the relevant feeder transfer groups (e.g. both normal phased transfer groups and the previous academic year's in year transfer group).

Group	Year	NCY	In Year
PR1 - Primary	2019	5	No
SEC - Primary to Secondary	2019	7	No

Select Home LA applications or All LA applications

Carry forward Home LA student applications only  Carry forward Home and Other LA student applications

6. Select either the **Carry forward Home LA student applications only** or **Carry forward Home and Other LA student applications** radio buttons:

- If you select **Carry forward Home LA student applications only**, then only home LA student applications with an application status that is not mapped to external code **CLOS - Closed/Completed** will be copied to the new transfer group.
- If you select **Carry forward Home and Other LA student applications**, then all LA student applications with an application status that is not mapped to external code **CLOS - Closed/Completed** are copied to the new transfer group, regardless of the Home LA of the student.

The **Date Place Required** field and **Add Students** button (discussed in the following steps) are displayed once one of these options has been selected.

Select Home LA applications or All LA applications

Carry forward Home LA student applications only  Carry forward Home and Other LA student applications

01/09/2019 **Add Students**

7. If required, select a different **Date Place Required**. **Date Place Required** defaults to 1st September of the In Year transfer group's academic year. This date is added to any applications carried over to the new transfer group if a date has not already been specified.
8. Click the **Add Students** button to add the relevant students from the selected transfer group to the new In Year transfer group.

The numbers of students successfully added to the transfer group and the number that could not be added are displayed as hyperlinks on the **Students** tab. Click on either of these links to display a printable report listing the students and giving further information relating to their applications.

## Process Periods and Vacancies

Process periods and vacancies must be recorded at the receiver schools before running the In Year offer processes or manually allocating children who have made In Year applications.

Process periods define the start and end time of the mini application rounds that can be used to process In Year admissions. They are defined via the **Process | Transfer Groups | In Year** tab.

After setting up process periods, the numbers of vacancies at receiver schools can be recorded for the process periods as they arise throughout the year. Vacancies are recorded via **Bases | All Bases | PAN & Vacancies**.

At least one process period must be added to cover the whole academic year, in order for vacancies to be kept up to date. This is necessary because vacancies are logged against process periods.

**NOTE:** Capita recommend that vacancies are recorded before the application closing date for the selected process period.

## Using Multiple Process Periods

Configuring multiple process periods enables you to use the Make Offers and Resolve Offers processes for In Year transfer applications.

Capita recommends that you define multiple process periods even if your Local Authority plans to allocate all In Year places manually, as this enables you to manage vacancies and allocations more effectively.

**NOTE:** The coordination of In Year applications between neighbouring Local Authorities is most effective if their process periods are coordinated.

Multiple periods must be set up so that when an application closing date passes, the next one starts immediately. This enables applications to be made at any time.

Resolve Offers can be run multiple times for each process period. Make Offers and **Final Allocation** are only run once for each process period.

## Using a Single Process Period

Local Authorities that plan to allocate all places manually only need to define one process period in order to keep vacancy numbers up to date. However, a single process period means that only one set of vacancy information can be logged for a process period. LAs using a single process period must to overwrite the vacancy information each time it changes.

**NOTE:** In order to allocate places manually, the Exceptional check box must be selected for each preference.

A single process period could have, for example, a start date and time of 01/09/2013 00:01, application closing date of 31/08/2014 23:58 and offer date of 31/08/2014 23:59.

## Adding Process Periods

1. Select an In Year transfer group. For more information on selecting transfer groups see [Selecting a Transfer Group](#) on page 82.
2. Select the **In Year** tab to display a list of existing process periods.

Students	Tests	In Year	E-App Settings	Sub Groups (14)	Coordinating LAs	Feeders												
<p>▼ <b>Process Periods</b></p> <table border="1"> <thead> <tr> <th>Period</th> <th>Starting Date</th> <th>Closing Date</th> <th>Offer Date</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>01/09/2018 00:01</td> <td>31/12/2018 17:00</td> <td>31/12/2018 17:01</td> <td> Edit</td> <td> Delete</td> </tr> </tbody> </table> <p><a href="#">+ Add Process Period</a></p>							Period	Starting Date	Closing Date	Offer Date			1	01/09/2018 00:01	31/12/2018 17:00	31/12/2018 17:01	Edit	Delete
Period	Starting Date	Closing Date	Offer Date															
1	01/09/2018 00:01	31/12/2018 17:00	31/12/2018 17:01	Edit	Delete													

3. Click the **Add Process Period** hyperlink to display the **Starting**, **Closing**, and **Offer** date and time fields.

Students	Tests	In Year	E-App Settings	Sub Groups (14)	Coordinating LAs	Feeders												
<p>▼ <b>Process Periods</b></p> <table border="1"> <thead> <tr> <th>Period</th> <th>Starting Date</th> <th>Closing Date</th> <th>Offer Date</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>01/09/2018 00:01</td> <td>31/12/2018 17:00</td> <td>31/12/2018 17:01</td> <td> Edit</td> <td> Delete</td> </tr> </tbody> </table> <p>Starting Date: dd/mm/yyyy*  00:01 </p> <p>Closing Date: dd/mm/yyyy*  17:00 </p> <p>Offer Date: dd/mm/yyyy*  00:01 </p>							Period	Starting Date	Closing Date	Offer Date			1	01/09/2018 00:01	31/12/2018 17:00	31/12/2018 17:01	Edit	Delete
Period	Starting Date	Closing Date	Offer Date															
1	01/09/2018 00:01	31/12/2018 17:00	31/12/2018 17:01	Edit	Delete													

4. Enter the dates and times.
5. Click the **Save** button to display the new process period on the **In Year** tab.
6. Repeat steps 3-5 to add further process periods as appropriate. Period numbers are generated automatically and increment by one when a new process period is added.

Process periods cannot overlap:

- The **Starting** date of one period cannot fall between the **Starting** and **Application Closing** dates of another.
- The **Offer** date of one period cannot fall between the **Start** and **Offer** dates of another process period.

Click the **Delete** hyperlink to remove process periods. A process period cannot be deleted if there is any vacancy data recorded against it.

## 06 | Managing the A&T Process

As well as the transfer group setup controls discussed in the previous chapter, the **Process** tab enables you to manage the import of catchment information, incoming student data, applications and parental responses. If you have the required licence and permissions, you can also run a bulk One Transport assessment from this tab.

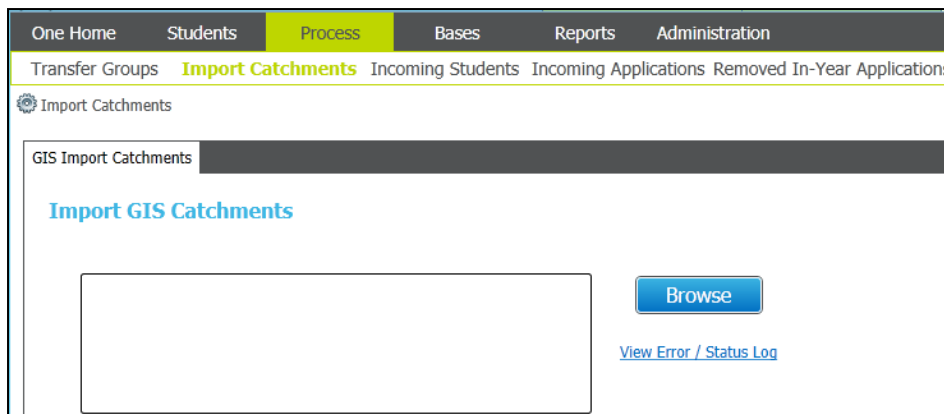
**NOTE:** The **Process | Appeals** tab works in the same way as the **Students | Applications | Appeals** tab, as discussed in chapter 1. For information on recording appeals, see [Managing Appeals](#) on page 44.

### Importing GIS Catchment Files

If your Local Authority uses GIS to measure distances then you must import your digitised catchments. Using these catchments rather than the default shapes ensures that both the GIS Catchment and GIS Routes and Distances processes operate successfully.

It is recommended that you only add any manual flags after calculating distances.

1. Select **Process | Import Catchments** to display the **Import Catchments** page.



2. Click the **Browse** button to display the Windows **Open** dialog.
3. Select the catchment file(s) that you wish to import. Catchment files must be in the .GML format.
4. Click the **Process** button to import the catchment files.

### The Import Process

During the catchment file import process, One checks the following:

- That the XML is well-formed.
- That each catchment has a valid **base ID** or **Local Authority and school number**.
  - If both are present, the **base ID** is used in preference to the **Local Authority and school number**.
  - If neither are present, or the base does not exist in the database, then an error is reported and the catchment is not imported.
- That each catchment has **Easting** and **Northing** values.

Any validation errors are written to the **Error / Status** log. Click the **View Error / Status** log hyperlink to view this log.

## Processing Incoming Students

Applications made via Admissions Online must be imported into A&T Back Office so that they can be validated and processed. Once imported, applications are displayed in the **Process | Incoming Students** tab. When importing online applications, One first attempts to match as many of the incoming students with existing students as possible. Any students that cannot be matched must be dealt with manually.

One matches students based on details provided by the applicant. If the applicant provides a UID then One checks for matching UIDs in the database. If a matching UID is found then the incoming student is matched to that student record.

If the applicant did not provide a UID, then One analyses the student's forename, surname, date of birth and gender in an attempt to make a match. If all four of these student identifiers match to an existing student then One matches the incoming and existing students.

After this matching process has taken place, One assigns one of three statuses to each incoming student:

- **Automatched:** One was able to match the incoming student to an existing student without any data conflicts. Students are automatched if all four student identifiers (**Forename, Surname, Date of Birth** and **Gender**) in their personal information are identical.
- **Matched with Conflicts:** One was able to match the student to an existing student, but some of the existing student's data conflicts with the information provided in the application.
- **Unmatched:** One was unable to match the student to an existing record. The data of these students is placed in conflict. Unmatched students must be matched manually, added to One as a new student, or discarded.

### Automatched Student Transfer Groups

One checks to see if automatched incoming students are already linked to the transfer group that was selected as part of the online application. If they are not linked to a group, or if they are linked to more than one group but not the one specified during the application, then One's actions vary depending on which option is selected for **Define Version of Online Applications Import to use** on the **Administration | Applications** tab.

- If **v3** is selected then the student is displayed in the **Automatched outside Transfer Group** sub tab of the **Tools | Manage eApplications | Unmatched** tab in the A&T v3 client. You can then manually select a transfer group for this student to be added to.
- If **v4** is selected then the matched One student is automatically linked to the incoming transfer group and no manual intervention is needed.

For more information on setting **Define Version of Online Applications Import to use**, see [Defining the Online Application Import Version to Use](#) on page 259.

### Matching Rules

When an incoming student is matched - either automatically or manually - the following rules apply:

- **If the Student Basic Details match and there is an incoming current school, but no current school listed in One:** The One student's school history is not updated with the incoming information and a warning message is displayed.
- **If the Student Basic Details match but the incoming current school does not match the current school in One:** The One student's school history is not updated with the incoming information and a warning message is displayed.

- **If some of the Student Basic Details don't match exactly:** One displays a dialog asking if you wish to continue with the match. If you do, the existing One details are not overwritten by the incoming details.

When a match is confirmed, the One student is added to the transfer group if they are not already a member of it.

## Matching Incoming Unmatched Students

1. Select **Process | Incoming Students | Unmatched** to display the **Unmatched** page.
2. Select a transfer group from the left-hand panel to display a list of all the unmatched incoming students in that transfer group.

3. Select the student you wish to match and then click the **Match** button to display the **Possible Matches** dialog. This dialog displays a list of all students in the transfer group where the **Surname, Transfer Group, Date of Birth**, or the first three characters of the **Postcode** match the incoming student's.

**NOTE:** Click the **View Application** hyperlink to view a printable summary of the student's online application details, including a submission history showing the date and **Status of Application** of each change.

4. If the student you wish to match to is not displayed in the list, enter search criteria for that student and then click the **Search** button. A list of students who match your search criteria is displayed.

**Possible Matches for:** Sheppard | 10/05/2010 | Male | AT10  
9 Einstein Blvd, , AT10

Search criteria: Sheppard, NCY, Gender, 10/05/2010, Postcode,  Active Students only, Transfer Group Code or Description (Optional)

[More Options](#)

Name	Chosen Forename	Chosen Surname	NCY	Student Id	Current School
<input type="checkbox"/> Sheppard, M   10/05/2010		Sheppard	4		Leagrave Junior School

5. Select the student that you wish to match to and then click the **Match** button. A confirmation dialog is displayed.
6. Click the **Yes** button to match the students.

## Adding New Unmatched Students Manually

1. Select **Process | Incoming Students | Unmatched** to display the **Unmatched** page.
2. Select a transfer group from the left-hand panel to display a list of all the unmatched incoming students in that transfer group.

Navigation: One Home | Students | **Process** | Bases | Reports | Administration | Welcome SYSADMIN | Open New Tab | Help | Logout

Transfer Groups | Import Catchments | **Incoming Students** | Incoming Applications | Removed In-Year Applications | Appeals | Transport Bulk Assessment

**Incoming Students - Transfer Group** | MTG- | [Edit](#) | [More op](#) | [Print](#)

Unmatched | Matched with Conflicts | Matched

3 Unmatched students | [Refresh](#) | [Wide View](#)

All	Name	NCY	Date of Birth	Gender	Post Code	Current School	Applicant Name	Status of Application
<input type="checkbox"/>	Example, Anne	0	13/06/2014	Female	MK44	Abbey Middle School	John User17	Resubmitted

3. Select the incoming student(s) that you wish to add as a new student and click the **Add New** hyperlink. A confirmation dialog is displayed.
4. Click the **Yes** button to create a new record in the One database for each selected student. The newly created student is added to the selected transfer group, a UID is generated for them and the browse is refreshed with the selected student removed.

### After Creating a New Student

After a new student is created from the **Unmatched** tab, One performs a series of checks based on the information provided by the applicant:

- One checks the **Bases** table to locate the current and receiver schools that were selected from the National Database list. If there is no matching base then a new base record is added to One with the following details seeded from the National Database:
  - **BASES.BASE\_NAME** (truncated to 50 characters if too long).
  - **BASES.GENDER** (if recorded).
  - **BASES.LEA\_NO.**
  - **BASES.DES\_NO.**



If a student's current school was not selected from the National Database list but was free-typed then a new base record is not created. The name of the school is displayed in the **Application Current School** field in the student's **Application Details** tab.

- If a student's current school was not selected from the National Database list, a school history record is not created.
- If a student's current school is a feeder school for the transfer group then a school history record is created for the selected base. The **Application Start Date** is taken as the **Start Date**.
- If the student's current base is not a feeder school for the transfer group then:
  - If the student is an overseas student, a school history record is created for the A&T Overseas School (this school is created if it is not already listed as a feeder for the transfer group).
  - If the student is from outside the county, a school history record is created for the A&T Out of County School (this school is created if it is not already listed as a feeder for the transfer group).
- One checks to see if the receiver school is already a receiver school in the transfer group (RECEIVER\_BASES). If not, then:
  - If the transfer group selected is not using the Offer Scheme then the selected receiver base is added to the Transfer Group Receiver Base list.
  - If the transfer group selected is using the Offer Scheme then a new sub group is created for the selected transfer group in TG\_SUBGROUP. The new sub group name is *Online Added School n*, where *n* relates to the sequential number of online sub groups added for this transfer group. The number increments by 1 each time such a sub group is added for this transfer group. The National Database school is added to the new sub group as a receiver for that sub group.

## Discarding Incoming Unmatched Students

1. Select **Process | Incoming Students | Unmatched** to display the **Unmatched** page.
2. Select a transfer group from the left-hand panel to display a list of all the unmatched incoming students in that transfer group.

All	Name	NCY	Date of Birth	Gender	Post Code	Current School	Applicant Name	Status of Application
<input type="checkbox"/>	Example, Anne	0	13/06/2014	Female	MK44	Abbey Middle School	John User17	Resubmitted

3. Select the incoming student(s) that you wish to discard and then click the **Discard** hyperlink. A confirmation dialog is displayed.
4. Click the **Yes** button to discard the selected student.

**NOTE:** Discarded student records are not deleted from the database, but no further actions (e.g. an application import) can be carried out.

## Resolving Incoming Student Address Conflicts

If there are address conflicts within an incoming application, either for a student, their sibling or the applicant, then the student's name is displayed on the **Process | Incoming Students | Matched with Conflicts** tab.

1. Select **Process | Incoming Students | Matched with Conflicts** to display the Matched with Conflicts tab.
2. Select a transfer group from the left-hand panel to view a list of all incoming students in that transfer group that have been matched with conflicts.

**NOTE:** If required, you can use the **View Application** hyperlinks to view a printable summary of the online application details, including a submission history showing the date and the **Status of Application** of each change.

3. Click the name of a student to view the **Manage Data Conflicts** screen. This screen has three tabs: **Student Address**, **Applicant Address** and **Sibling Address**. Address tabs with conflicts are highlighted in red.

Student Address (1) Applicant Address (1) Sibling Address (1)

### Conflicting Items

Applicant: Mr App1 App1

▼ Address

One Record *No data value present in One*

Incoming Record

Accept Discard

Insert, Insert, 2, Vicarage Green, Thurleigh, Bedford, MK44 2DR

Student Address (1) Applicant Address (1) Sibling Address (1)

### Conflicting Items

Sibling

▼ Address

One Record *No data value present in One*

Incoming Record

Accept Discard

Insert, Insert, 2A, Insert Vicarage Green, Thurleigh, Bedford, MK44 2DR

Corresp.  Type:

4. Select the tab that you wish to resolve conflicts for to display the **Conflicting Items** screen. This screen displays the existing One student, application or sibling address (as applicable) and the corresponding address given in the incoming student's record.

**NOTE:** You can use the drop-down menu at the top of the **Sibling Address** tab to switch between the addresses of different siblings.

5. If you wish to accept the incoming address:
  - a. Select the **Accept** check box to display the **Address Manager** dialog.

**Address Manager**

Incoming Record 20, Vicarage Road, , MK44

[+ Add a new address](#)

	Street Address	Country	USRN
<input type="checkbox"/>	VICARAGE GREEN, , MK44	UK	

- b. Use the **Address Manager** dialog to either:
      - Add the incoming address as a new address. For more information on this process, see [Adding an Address to the Address Catalogue](#) on page 238. The Address Manager dialog closes after the address has been added.
      - Select the address from One's list of existing addresses. To search One's address list, enter search criteria into the bar at the top of the dialog and then click the **Search** button to select the address and close the dialog.
    - c. If the address is to be used as a correspondence address, select the **Corresp.** check box.
    - d. Select the address **Type** from the drop-down menu.

**NOTE:** The **Corresp.** and **Type** fields are not available on the **Applicant Address** tab.

6. If you wish to discard the incoming address, select the **Discard** check box.
7. Click the **Apply** button. A summary dialog is displayed.
8. Click the **Continue** button to save your changes.

## Viewing Incoming Matched Students

1. Select **Process | Incoming Students | Matched** to display the **Matched** tab.
2. Select the transfer group that you wish to view from the left-hand panel.

3. Optionally, use the search fields to filter your search. You can enter application dates into the **From** and **End** fields, and a name into the **Student Name** field.
4. Click the **Search** button to view a list of matched incoming students that meet your search criteria.

**NOTE:** To view a summary of a particular student's application, click the **View Application** hyperlink.

For online applications, the **View Application** dialog shows the details entered by the applicant rather than the details of the matched student. For example, if an applicant entered "Billy Smith" as a student name, and that student was then matched to a One record with the name "William-Smith Jones", then the student would show as William Smith-Jones in the **Matched** tab but Billy Smith in the **View Application** dialog.

## Managing Multiple Applications

The **Process | Incoming Applications | Multiple Applications** tab enables you to manage those students who have multiple applications. For example, a student could have multiple online applications, or a paper application recorded in A&T Back Office and an online application. Each student can only have one application for a given transfer group.

The quickest way to process duplicate applications is to mark one of the applications as inactive. Students are no longer included in the list on the **Multiple Applications** tab when they have only one active application.

Alternatively, you can use the **Mark as 'not requiring import'** feature to stop One from importing an application without deleting it. Applications that are marked as inactive are removed from the **Multiple Applications** tab, but are still viewable by the applicant in the Citizen Portal.

Applications in One are governed by the following rules:

- A student can only ever have one A&T Back Office application per transfer group.
- For e-Applications, the whole application can be made inactive. For Back Office applications, only application preferences – rather than the whole application - can be made inactive.
- Only matched students (either manually matched or automatched) are displayed on the **Multiple Applications** tab.
- Only submitted applications are displayed on the **Multiple Applications** tab.

## Viewing the Multiple Application Summary

1. Select **Process | Incoming Applications | Multiple Applications** to display the **Multiple Applications** tab.
2. Select a transfer group from the left-hand panel to view a list of students in that transfer group who have more than one active application.

3. Optionally, filter the list using the fields at the top of the tab. You can add application dates into the **From** and **To** fields and a name into the **Student Name** field.
4. Click the arrow next to a student's name to view an overview of their applications.

Applicant Name	Email	Phone	Application Date	1st Preference	Online Application?
<input type="checkbox"/>				ANTBase01	No - Not Imported <a href="#">View Application</a>
<input type="checkbox"/>	Test1 Test1 <a href="mailto:test@testmail.com">test@testmail.com</a>		28/04/2014	ANTBase08	Yes - Not Imported <a href="#">View Application</a> <a href="#">Set application to 'not requiring</a>

## Viewing Full Application Details

1. Select the multiple applications summary for a particular student. For more information on this process, see [Viewing the Multiple Application Summary](#) on page 127.
2. Click an application's **View Application** hyperlink to display the **Application Details** dialog.

**Application Details for Student01, 15297**

Full Application Details (open in [this tab](#) or [a new tab](#))

Application | **Additional Details**

Transfer Group: MAT2015 | Application Ref: 820-2015-UID: 820

Registered School: Carlton Lower School | Application Verified: No [Verify](#)

Admission Address: 15 Amphill, MK42 | [Choose a different Address](#)

**Preferences (1)** | [Edit](#) | [Set Preference Inactive](#)

Receiver	Offer Status
1   <b>ANTBase01</b> 0 sibling   Late: No   Dist:	Offer   <a href="#">View Reasons</a>

**Applicant Details**

3. If required, click the **open this tab** or **a new tab** hyperlinks next to **Full Application Details** to either stay in the present tab or open a new tab to display the application in the **Students | Applications | Application Details** page.

## Comparing Applications Side-by-Side

The **Compare Applications Details** dialog enables you to view two applications side-by-side. This can be useful if a citizen has made an updated application since their first application was imported, giving you a clear view of what has changed in the new application.

1. Select the multiple applications summary for a particular student. For more information on this process, see [Viewing the Multiple Application Summary](#) on page 127.
2. Use the check boxes to select the applications you wish to compare and then click the **Compare Applications Details** button to display the **Compare Application Details** dialog. The details of the two applications are displayed in adjacent columns.

**Compare Applications Details**

**Application for Student01 15297 05 May 2004 - TG for Multiple Application**

Online application submitted on 28 April 2014 | Back office application

[Set application to 'not requiring import'](#) | [Open full back office Application details \(in new tab\)](#)

**Applicant Details**

**Child Details**

**Preferred Schools** | [Set preferences to 'not requiring import'](#) | [Set Preferences Inactive](#)

**Preference School Rank 1**

Name of School	ANTBase08	ANTBase01
School Address	Flat Name, 6 Duckmill, Bedford, MK42	Flat Name, 6 Duckmill, Bedford, MK42

[Reasons for this Preference](#) | **Applicant's** | **LA**

**NOTE:** You can view full details of back office applications by clicking the **Open full back office Application details** hyperlink. This hyperlink opens a new tab displaying the application in the **Students | Applications | Application Details** page.

## Updating Back Office Applications from Incoming Online Applications

1. Open the back office application and the application you wish to copy from in the **Compare Applications Details** dialog. For more information on comparing applications, see [Comparing Applications Side-by-Side](#) on page 128.

2. Use the check boxes to select the data items you wish to copy and then click the **Copy online data to back office** button. The data from the online application is copied to the back office application, overwriting any data items that already exist in the copied field for the back office application, and the Application History and Preference History are updated accordingly.

The following information can be imported via the **Compare Applications Details** screen:

- Applicant Details
- Moving Details
- In Year Details
- Additional Application Details
- Preference Reasons – this can only be done if the preference order of the two applications is the same.

3. If required, import preferences from the online application to the back office application:

- b. Open the **Preferred Schools** section to view a list of preferences for both applications.

- c. Click the **Import Now** hyperlink underneath the school name of the preference you wish to import. A confirmation dialog is displayed.
- d. Click the **Yes** button to import the selected preference. The new preference is marked as imported to ensure that it is not imported again.

One uses the following rules when importing preferences:

- If there is already an active back office parental preference for the same student, transfer group and school as the selected online preference, and the number of the back office preference is less than the transfer group's **System Generated Preferences Starting Number**, then you are prevented from importing the online preference.
- If there is already an active back office parental preference for the same student, transfer group and school as the selected online preference, and the number of the back office preference is greater than or equal to the transfer group's **System Generated Preferences Starting Number**, then the back office preference is updated with the online preference's details.

Any LA reasons associated with the system-generated preference are preserved, but applicant reasons and memo text are imported from the online preference.

- If there is already an active back office preference with the same preference number as the online preference, One displays a warning dialog asking if you want to import the online preference and assign the next available preference number (one more than the highest current back office parental preference) to it.

### Importing a Whole Online Application

In certain circumstances, you can use the **Import Now** function to overwrite an entire back office application with an equivalent online application. To do so, select the relevant transfer group from the **Multiple Applications** page and click the **Import Now** hyperlink for the online application you wish to import.

4th Preference	Online Application?				
Waters Edge Primary School (p4mt)	Yes - Not Imported	<a href="#">View Application</a>	<a href="#">Set application to 'not requiring import'</a>	<a href="#">Preferences Not Requiring Import</a>	<a href="#">Import Now</a>
Raynsford Primary School (p4t)	Yes - Not Imported	<a href="#">View Application</a>	<a href="#">Set application to 'not requiring import'</a>	<a href="#">Preferences Not Requiring Import</a>	<a href="#">Import Now</a>

The **Import Now** function is only available if either of the following conditions are true:

- There are no active parental preferences associated with the back office application.
- There are only system-generated active preferences for the back office application where the preference number is equal to or greater than the transfer group's **System-Generated Preferences Starting Number**.

In this scenario, the back office preference is updated with the online preference's details, including updating the preference number to a parental preference number. LA reasons associated with the system-generated preference are preserved, but applicant reasons and memo text are imported?

**NOTE:** The *Application History* and *Preference History* are updated accordingly after the **Import Now** function is run.

## Setting Preferences and Applications as 'Not Requiring Import'

Marking an online application or preference as not requiring import enables you to indicate that you have dealt with that particular application or preference. For example, you might choose to update the back office application or preference manually instead of importing the online details in order to preserve processing work that has already been done on the back office application.

Applications or preferences marked as not requiring import are ignored by the scheduled import task, but can still be viewed by citizens via the Citizen Portal.



### Setting a Whole Application as ‘Not Requiring Import’

1. Select the multiple applications summary for a particular student. For more information on this process, see [Viewing the Multiple Application Summary](#) on page 127.
2. Click the **Set application to ‘not requiring import’** hyperlink for the application you wish to mark. A confirmation dialog is displayed

The hyperlink is located at the far right of the screen, so you may need to scroll right or set the screen to wide view to see it.

4th Preference	Online Application?			
Waters Edge Primary School (p4mt)	Yes - Not Imported	<a href="#">View Application</a>	<a href="#">Set application to 'not requiring import'</a>	<a href="#">Preferences Not Requiring Import</a>
Raynsford Primary School (p4t)	Yes - Not Imported	<a href="#">View Application</a>	<a href="#">Set application to 'not requiring import'</a>	<a href="#">Preferences Not Requiring Import</a>

3. Click the **Yes** button to set the application as not requiring import. The application is removed from the **Multiple Applications** page, although applicants can still view it in the Citizen Portal.

### Setting Individual Preferences as ‘Not Requiring Import’

1. Select the multiple applications summary for a particular student. For more information on this process, see [Viewing the Multiple Application Summary](#) on page 127.
2. Click an application’s **Preferences Not Requiring Import** hyperlink to display the **Select preference(s) to mark as ‘not requiring import’** dialog.

The hyperlink is located at the far right of the screen, so you may need to scroll right or set the screen to wide view to see it.

4th Preference	Online Application?			
Waters Edge Primary School (p4mt)	Yes - Not Imported	<a href="#">View Application</a>	<a href="#">Set application to 'not requiring import'</a>	<a href="#">Preferences Not Requiring Import</a>
Raynsford Primary School (p4t)	Yes - Not Imported	<a href="#">View Application</a>	<a href="#">Set application to 'not requiring import'</a>	<a href="#">Preferences Not Requiring Import</a>

Select preference(s) to mark as 'not requiring import'		
Base Name	Address	Not Requiring Import
1 <b>ANTBase08</b> LEA No: 820 School No: 0018	Flat Name, 6 Duckmill Lane, Bedford, MK42 0AL	<input type="checkbox"/>

3. Use the check boxes to select the preferences you wish to mark as not requiring import, then click the **Save** button to mark the preferences and close the dialog.

Applications that no longer have any preferences that require import are not displayed on the **Multiple Applications** page.

### Setting Back Office Preferences as Inactive

You can use the **Multiple Applications** screen to make specific preferences in a back office application inactive. This can be useful when comparing the back office application to a more recent online application, enabling you to make preferences that are no longer required inactive before importing the current set of preferences.

1. Open the back office application and the application whose preferences you wish to make inactive in the **Compare Applications Details** dialog. For more information on comparing applications, see [Comparing Applications Side-by-Side](#) on page 128.
2. Scroll down to the **Preferred Schools** section and click the **Set Preferences Inactive** hyperlink to display the **Inactive Preference Details** dialog

3. Use the check boxes to select the preferences that you want to make inactive.
4. Enter a date into the **Inactive Date** field. This is the date that the preference became inactive.
5. Optionally, select the reason that the preference was made inactive from the **Inactive Reason** drop-down menu.
6. Click the **Save** button. A confirmation message is displayed.
7. Click the **Yes** button to make the selected preferences inactive and delete any associated banding information.

## Making Duplicate Applications Inactive

1. Select the multiple applications summary for a particular student. For more information on this process, see [Viewing the Multiple Application Summary](#) on page 127.

2. If required, click the memo button to enter a memo about decisions taken. For more information on recording memos, see [Recording Memos](#) on page 267.
3. Use the check boxes to select the application(s) that you wish to make inactive and then click the **Make Selected Applications Inactive** button. A confirmation dialog is displayed.
4. Click the **Yes** button. At this point, Online applications are made inactive, while Back Office applications have all their preferences marked as inactive.
5. Repeat this step until the student only has one active application. The student's name will disappear from the Multiple Applications tab at this point.

- Repeat steps 3, 4 and 5 until there are no students remaining on the Multiple Applications tab.

**NOTE:** When an application is made inactive, its **Inactive Preference Reason** is set to **Multiple Application Review**. All applications that are made inactive are logged in the Preference History.

You cannot make an application with an offered or allocated preference inactive. If you attempt to make such an application inactive, One displays an error message.

## Managing Incoming Applications That Have Exceptions

One generates exceptions if an incoming matched application contains data that does not tally with data held in the One database. The **Process | Incoming Applications | Exception** tab displays a list of students who have exception messages, enabling you to see if there are any differences that need to be reconciled between the incoming data and the existing One data.

### Viewing Incoming Applications That Have Exceptions

- Select **Process | Incoming Applications | Exceptions** to view the **Exceptions** tab.

- Select a transfer group from the panel on the left-hand side.
- Optionally, use the filters to narrow your search. You can enter a **Student Name**, **Exception Message** and **Import Date**.
- Click the **Search** button to view a list of students who match your search criteria and who have exception messages.

- Click the arrow next to a particular student to view details of the exceptions that were generated for that student.

## Deleting a Student's Exceptions

1. Select **Process | Incoming Applications | Exceptions** to view the **Exceptions** tab.

2. Select a transfer group from the panel on the left-hand side.
3. Optionally, use the filters to narrow your search. You can enter a **Student Name**, **Exception Message** and **Import Date**.
4. Click the **Search** button to view a list of students who match your search criteria and who have exception messages.

5. Use the check boxes to select the students whose exceptions you wish to delete. Alternatively, select the **All** check box to select all students.
6. Click the **Delete Listed Exceptions against selected Students** button to delete all exceptions for the selected students.

## Viewing Application Response Messages

The **Process | Incoming Applications | Response Messages** tab displays the parent/carer responses that have been entered online and imported according to the schedule set in **Administration | Online Parameters | Schedule and Log Import of Online Applications**.

If the current offer status for a preference is either **A** (Accepted), **Y** (Allocated), **O** (Offered) or **P** (Provisional), and an online applicant rejects that offer, then A&T Back Office preserves the existing offer status when online responses are imported. This process ensures that the offer of a place for the child is not removed automatically, enabling the Admissions Officer to review the case manually instead.

1. Select **Process | Incoming Applications | Response Messages** to display the **Response Messages** page.

2. Select a transfer group from the list to display a list of response messages for that group.

Multiple Applications | Exceptions | **Response Messages** | Wide View

Student ID:  Student Name:  Response Message:

Import Date from:    1 / 1 Page

2 Response Messages

Process Type: AT_IMPORT	TG: PenTestGroup3	Student Name: 4, CHILD	Student Id:	Rank: 1	LA: 933 29/09/2018
Response:	Support Text:	Error No:	Procedure Name: sp_import_appl_pref_pcresponse		
School No: 3105	Base: Abbas and Templecombe Church of England Primary Sc				

**NOTE:** To filter the list to show only those transfer groups that are still active, select the **Show Active Only** check box.

- Optionally, select a response to view its exception messages (including any relevant Oracle messages).

Process Type: AT\_IMPORT TG: PenTestGroup3 Student Name: 4, CHILD Student Id: Rank: 3 LA: 873 29/09/2018

Response: Support Text: Error No: Procedure Name: sp\_import\_appl\_pref\_pcresponse

School No: 2450 Base: Abbey Meadows Primary School

**Exception Message**

Application message: No response received online

Oracle message:

**NOTE:** You can also view response messages in the **Application Status/Error Log**, which lists all files (applications and parent/carer responses) that have been imported.

## Running a Bulk Transport Assessment

The **Process | Transport Bulk Assessment** hyperlink opens the **Bulk Assessment** area of One Transport v4 in a new tab. The **Bulk Assessment** area of One Transport enables you to carry out transport assessments for one or more transfer groups.

The **Process | Transport Bulk Assessment** hyperlink is displayed only if the following conditions are met:

- The LA has a One Transport v4 licence.
- You have at least write permission to the bulk assessment process of One Transport.
- You have correctly configured a URL for One Transport in the CCS Config Tool.

**NOTE:** For more information on using the **Bulk Assessment** area of One Transport see the *Performing Assessments help* topic of the *Transport Back Office Handbook*, available from the [One Publications website](#).

Single passenger | **Multiple passengers** | Bulk transfer

Perform assessments | Approve applications | Allocate journeys | Issue tickets | Invoice passengers

Perform assessments for: Admissions with preferences | Accepted | in admissions transfer group | sub-group

Schools: All schools

Use this criteria for the destination: Nearest site | and this criteria for the alternatives: Nearest site

Assessments will run from: 16/05/2019 (or take start date from school) | and will end on: dd/mm/yyyy

Create new assessments where none exist for the above date range: but don't alter existing assessments

[ clear | preview ]

## Initialise Preferences Routine (Northern Ireland Only)

Permissions for the **Initialise Preferences** routine are granted in the v4 Client via **Tools | Permissions | Main Business Process – Admissions Offers and Ranks**.

01. Main Processes				
Main Business Processes	Admissions Offers and Ranks			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Admissions Offers and Ran...		✓		
Allocate Alternative Places		✓		
Final Allocations		✓		
Initialise Preferences		✓		
Make and Resolve Offers		✓		
Offers Statuses		✓		
Publish Offer Information Online		✓		
Ranks		✓		
Reset Allocations		✓		

This routine sets the **Offer Status** of the first preference on each application to 'P' (Pending).

It should be run after:

- The application closing date has passed
- All applications have been imported
- Any conflicts/matching issued have been resolved.

It should be run before:

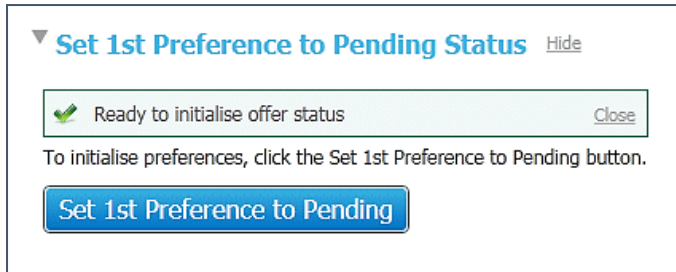
- The Prevent OAA Ranking Online flag is unchecked (allowing school users to respond to applications).

## Setting Preferences to P

After all applications have been imported, the **Initialise Preferences** routine is run.

To run the routine:

- In v4 Online, select **A&T Back Office | Process | Transfer Groups | Students** tab.



- Click the **Set 1<sup>st</sup> Preference to Pending** button. This will set all 1<sup>st</sup> preferences to 'P' and make them visible to the relevant schools via the Schools Admissions Portal.

The **Set 1<sup>st</sup> Preference to Pending** button is greyed out if any of the following rules apply:

- The user does not have permission to run the routine
- There are no preferences attached to the transfer group
- Offer statuses are already pending
- Offer statuses indicate schools are already responding to applications. This process cannot be used after offer statuses have been updated.

# 07 | Making Offers

This section covers the offer process itself.

## Offer Process Overview

The A&T offer process is split into four phases, each with its own sub-processes. Some of these sub-processes are only run once for each transfer within an offer round, which others may need to be run multiple times.

**IMPORTANT NOTE:** The A&T offer processes involve complex operations and should be selected with care, as some changes are permanent. A confirmation message is displayed whenever One is about to make a permanent change.

The phases of the A&T offer process are:

- **Student Selection:** Used to bulk-populate transfer groups with students.

For Normal Phased transfer groups, this process selects all students in the transfer group's **Student NCY** that are registered at one of the transfer group's feeders. For more information on running **Student Selection** within a Normal Phased transfer group, see [Adding Students to a Phased Transfer Group](#) on page 86.

For In Year transfer groups, this process selects:

- Home LA students on a waiting list in selected Normal Phased transfer groups from the previous academic year.
- Any students with incomplete, outstanding applications from the previous year's In Year transfer groups.

For more information on running **Student Selection** within an In Year transfer group, see [Adding Feeder Transfer Groups and Students](#) on page 114.

- **Pre-Offer Processing:** Used to create system generated preferences on the students within a transfer group, and to copy applicant reasons to Local Authority reasons either in bulk or individually.

System generated preferences give an indication of the bases to which a particular students is likely to apply, and can be used to inform applicants of their children's linked receiver or catchment schools before they make an application.

**Pre-Offer Processing** comprises the following sub-processes:

- **Feeder Receiver:** Generates preference records by referring to the current registered base of each student and then creating a preference for that school's receiver base in **Bases | Linked Bases**. For more information on running the Feeder Receiver process, see [Running the Feeder Receiver Process](#) on page 141.
- **Catchments and Distances:** Generates preference records for the schools within whose catchment area each student resides. For more information on running the Catchments and Distances processes, see [Running the Catchments and Distances Processes](#) on page 142.
- **Copy Applicant Reasons:** copies the preferences reasons given by applicants into the **LA Reasons** fields. For more information on running the Copy Applicant Reasons processes, see [Running the Copy Applicant Reasons Process](#) on page 154.



- **Offers Processing:** Used to place children fairly, and according to oversubscription criteria, in their highest possible preference school. **Offers Processing** comprises the following sub-processes:

- **Make Offers:** The first stage in the offers process. Applicants to receivers within the home local authority are sorted by each sub group's oversubscription criteria and then associated to receivers. Offers are then made to those students within each receiver's Published Admissions Number.

The Make Offers process differs depending on whether it is run for a Normal Phased or In Year transfer group, and whether banding is in use in the transfer group.

For more information on running the Make Offers process, see [Running the Make Offers Routine](#) on page 155.

- **Resolve Offers:** This process aims to ensure that all students have an allocated (or provisionally allocated) place at one of their preference receivers (although this is not always possible). One sets the lower-ranked preferences of any students with multiple offers to **Q** (No Longer Required), leaving those students with only their highest-ranked preference. This action frees up places at their lower-ranked receivers, which can then be offered to other students.

Resolve Offers also takes into account Other Coordinating Local Authority receivers. As such, the process may need to be run several times as ALT files are imported and exported during the offer process. Eventually, a "steady state" is reached, where all applicants are assigned to their highest possible preference.

For more information on running the Resolve Offers process, see [Running the Resolve Offers Process](#) on page 169.

- **Final Allocations:** This process deals with any remaining provisional offers and checks that each Home Local Authority student has at least one preference with a status of **Y** (Allocated). Any students who cannot be allocated are assigned to the No Offer base with a status of **O** (Offer). These students must then be placed manually.

For more information on running the Final Allocation routine, see [Running the Final Allocations Routine](#) on page 183.

- **Publish Offer Information Online:** This process feeds offer status information to all automatic offer emails and users of the A&T Online public facing software. It can only be run once for each transfer group, and must be run no later than the day before the Publicise date.

For more information on running the Publish Offer Information Online routine, see [Publishing Offer Information Online](#) on page 198.

- **Post Offer Processing:** This section of the **Process | Transfer Groups | Students** tab page is enabled when all the offer processes have been completed (except for Northern Ireland EANIs, who have access to the Post Offer Processing section at all times). It contains the Final Transfer process, which enables you to update the school history of the students if your Local Authority is not using the B2B Students or XML Data Exchange functions to update your One School History information from SIMS.

For more information on running the Final Transfer process, see [Running the Final Transfer Process](#) on page 199.

**NOTE:** The Pre-Process and Process controls are disabled while the bulk process routines are being run, as it is very important that another user does not start another routine of the same type during this time. You can manually unlock routines if required, although you should exercise extreme caution when doing so. For more information on unlocking bulk routines, see [Unlocking Routines](#) on page 244.

## Running the Feeder Receiver Process

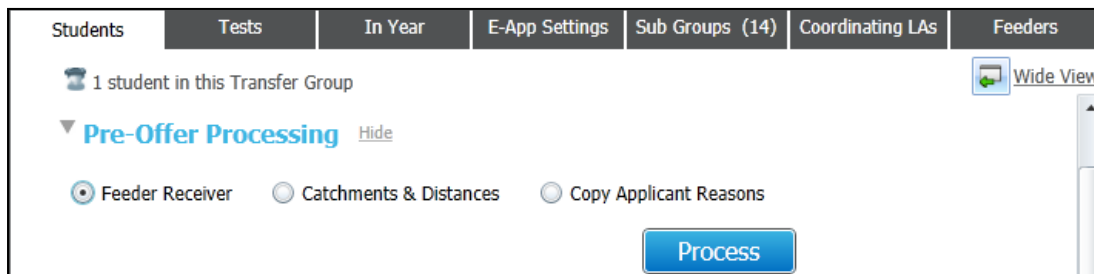
The Feeder Receiver process creates a system-generated preference (as opposed to a parental preference) for the linked receiver to each student's current (feeder) school. This function helps with planning, as it gives an indication of which school the student is likely to apply to.

The following conditions must be met before the Feeder Receiver process is run:

- Feeders and receivers must be linked (via **Bases | All Bases | Linked Bases**). For more information on linking feeders and receivers, see [Link Receivers to a Base](#) on page 228.
- The **Use Feeder Link** check box must be selected in the sub group details panel. For more information on configuring sub group details, see [Editing Sub Group Details](#) on page 89.

To run the Feeder Receiver process:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Students** tab is open and the **Feeder Receiver** radio button is selected in the **Pre-Offer Processing** section.



3. Click the **Process** button. A system-generated preference for their current school's linked receiver is added to all students in the transfer group.

The new preference takes the **System Generated Preferences Starting No.** (configured via **Transfer Group Details**) as its preference number, unless the starting number has already been allocated to a preference for this student in the active transfer group. If the starting number is not available then the preference takes the next available number.

The **Feeder Receiver** process takes into account the gender of the student. If a linked receiver has a single sex intake then One only creates a preference for students with the matching gender.

System generated preferences created by this process have the **Feeder Link** LA reason selected in **Application Details | Preferences**. If the student already had a preference recorded for this base then a new preference is not created. However, the **Feeder Link** LA reason is selected for the existing preference.

## Changes in Feeder

One compares each student's registered and feeder bases when the Feeder Receiver process is run. If these bases do not match then the feeder base is overwritten with the current registered base. If the current registered base is not a feeder for the transfer group then it is added to the **Tools | Module Administration | Transfer Groups | Choose Feeders** list so that you can add it as a feeder for the transfer group if necessary.

**NOTE:** If a student's registered base changes after the Student Selection process has been run, but before allocation, then the registered base is updated. The feeder base is not automatically updated, in order for the child to retain their position within the transfer group. However, the student's new registered base might not be a feeder for their current transfer group, resulting in an incorrect allocation. The **Update Feeder** button on the **Application Details** screen enables you to correct this issue for individual students.

## Running the Catchments and Distances Processes

The Catchments & Distances processes calculate catchment school and home-preference distance based on a student's admissions or current address. These processes can be used to create system generated preferences (as opposed to parental preferences) for each student, based on that student's proximity to a particular school.

There are four Catchments & Distances processes:

- **GIS Catchment:** Creates preferences for students based on their geocoded address.
- **Postcode Catchment:** Creates preferences based on student postcode.
- **GIS Routes & Distances:** Bulk-calculates the routes and distances from home to school for students, based on their geocoded address.
- **Direct Distances:** Creates preferences based on the direct distance (i.e. the distance "as the crow flies", rather than the **Safe Walking Distance**) between the student's address and the base.

These processes can be used before applications have been recorded for a transfer group, in order to give an indication of the schools that students are likely to apply to and to enable the LA to inform applicants of catchment schools before they make their application.

The Catchments & Distances processes can also be run after applications have been recorded, in order to verify that student addresses fall within the catchment area of their preference school.

All Catchments & Distances processes maintain an error log. To view this log in a pop-up window, click the **View Error / Status Log** hyperlink. You can also export the error log to a spreadsheet file by clicking the **Export** hyperlink.

## Running the GIS Catchment Process

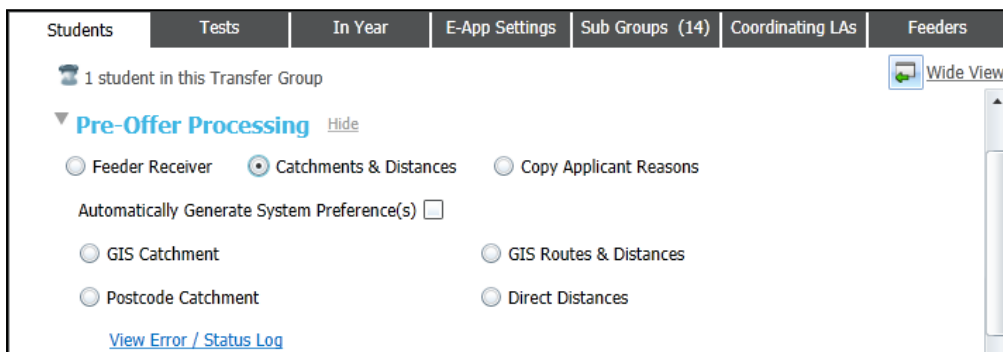
The GIS Catchment process calculates school and home--preference distance for students based on their geocoded address. This process uses the easting and northing of either the student's admissions or correspondence address, depending on whether the **Use Admissions Address** check box is selected for the transfer group. If the process is run before applications have been added then the current correspondence address is used, as an admissions address will not yet have been added. Applications that have neither an admissions nor a current address are not processed.

The following conditions must be met in order to use the GIS Catchment process:

- **Use Flag Catchment** must be selected in Sub Group Details. For more information on configuring sub group details, see [Editing Sub Group Details](#) on page 89.
- **Use GIS** must be selected for the transfer group. For more information on Use GIS, see [Adding Basic Details \(Phased\)](#) on page 83.

To run the GIS Catchment process:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82
2. Ensure that the **Students** tab is open and the **Pre-Offer Processing** section is open, then select the **Catchments & Distances** radio button. Additional fields related to the Catchments & Distances processes are displayed.

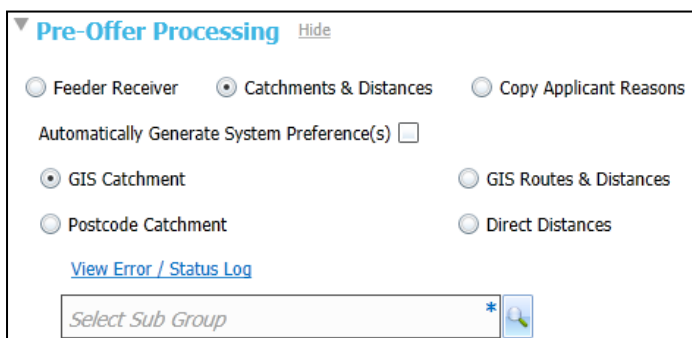


3. If required, select the **Automatically Generate System Preferences** check box.

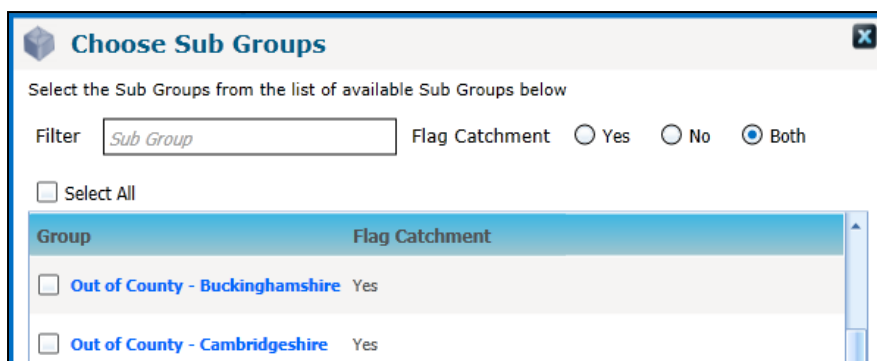
If this check box is selected, One creates a system-generated preference for each school that the student's address is in catchment for.

If this check box is not selected, the process runs without creating any preferences. Running the process without creating preferences can help you to validate whether or not a student's address lies within the catchment area of their preference schools.

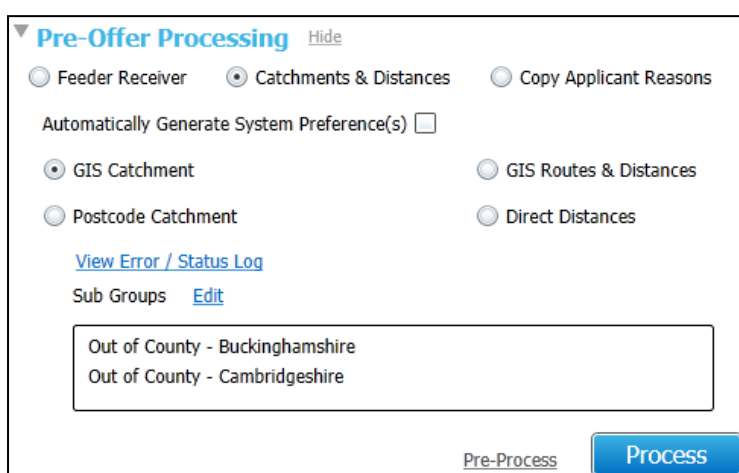
4. Select the **GIS Catchment** radio button to display the **Select Sub Group** browse.



5. Click the **Select Sub Group** browse to display the **Choose Sub Groups** dialog.



6. Select the sub groups that you wish to run the **GIS Catchment** process for. To run the process for the entire transfer group, select the **Select All** check box.
7. Click the **Select** button to close the dialog and return to the **Students** tab. The **Pre-Process** hyperlink and **Process** button are displayed.



8. If you wish to run the process without making any changes to the database (in order to validate and correct any data errors before changes are made):
  - a. Click the **Pre-Process** hyperlink to display the **Process Transfer Group** dialog.
  - b. Select an option from the dialog:
    - **Update all Preferences for the Application:** Checks all students to determine whether each student's address falls within the catchment area of their preferences.
    - **Update Unprocessed Preferences only for the Application:** Carries out the same check as **Update all Preferences for the Application**, but is only run for students who have a status of **Not Processed**.
  - c. Click the **Pre-Process** button to close the dialog and run the **GIS Catchment** process without changing the database. The **Error / Status** log is updated with the outcome of the checks.
9. Once you have corrected any validation errors, run the **GIS Catchment** process:
  - a. Click the **Process** button to display the **Process Transfer Group** dialog.
  - b. Select an option from the dialog:
    - **Update all Preferences for the Application:** Checks all students to determine whether each student's address falls within the catchment area of their preferences.
    - **Update Unprocessed Preferences only for the Application:** Carries out the same check as **Update all Preferences for the Application**, but is only run for those students who have a status of **Not Processed**.

- c. Click the **Process** button to close the dialog and run the **GIS Catchment** process. The **Error / Status** log is updated as the process runs.

## Running the Postcode Catchment Process

The Postcode Catchment process calculates school and home-preference distance for students based on the student's postcode. This process uses either the student's admissions or correspondence address, depending on whether the **Use Admissions Address** check box is selected for the transfer group. If the process is run before applications have been added then the current correspondence address is used, as an admissions address will not yet have been added. Applications that have neither an admissions nor a current address are not processed.

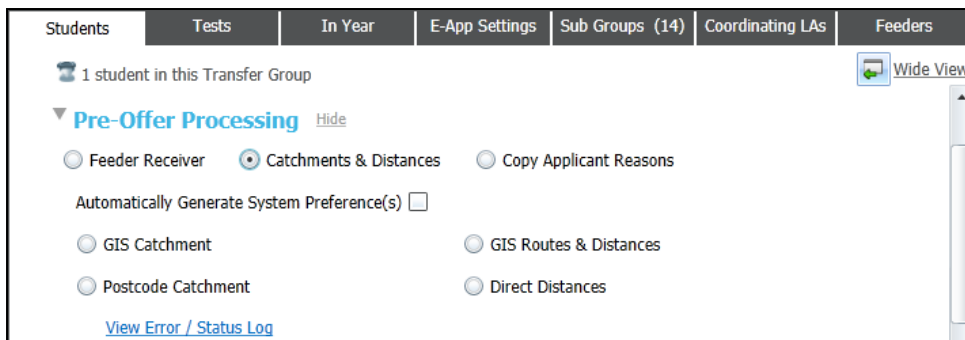
The following conditions must be met in order to use the Postcode Catchment process:

- **Use Flag Catchment** must be selected in **Sub Group Details**. For more information on configuring sub group details, see [Editing Sub Group Details](#) on page 89.
- Postcode catchments must be defined via the **Bases | All Bases | Catchment** tab. For more information on defining postcode catchments, see [Editing a Base's Postcode Catchment Areas](#) on page 227.

**NOTE:** Postcode Catchment is not normally used for transfer groups where **Use GIS** is selected (these groups generally use the GIS Catchment process instead), but it can be used for these groups if required.

To run the Postcode Catchment process:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Students** tab is open and the **Pre-Offer Processing** section is open, then select the **Catchments & Distances** radio button. Additional fields related to the Catchments & Distances processes are displayed.



3. If required, select the **Automatically Generate System Preference(s)** check box.

If this check box is selected, One creates a system-generated preference for each school that the student's address is in catchment for.

If this check box is not selected, the process runs without creating any preferences. Running the process without creating preferences can help you to validate whether or not a student's address lies within the catchment area of their preference schools.

4. Select the **Postcode Catchment** radio button. The **Select Sub Group** browse is displayed.

## Making Offers

**Pre-Offer Processing** [Hide](#)

Feeder Receiver   
 Catchments & Distances   
 Copy Applicant Reasons

Automatically Generate System Preference(s)

GIS Catchment   
 GIS Routes & Distances

Postcode Catchment   
 Direct Distances

[View Error / Status Log](#)

Select Sub Group  \*

**NOTE:** If the transfer group has **Use GIS** selected, you are asked to confirm that you wish to select the Postcode Catchment process at this point. Click the **Continue** button to close the confirmation dialog.

- Click the **Select Sub Group** browse to display the **Choose Sub Groups** dialog.

**Choose Sub Groups**

Select the Sub Groups from the list of available Sub Groups below

Filter  Flag Catchment  Yes  No  Both

Select All

Group	Flag Catchment
<input type="checkbox"/> Out of County - Buckinghamshire	Yes
<input type="checkbox"/> Out of County - Cambridgeshire	Yes

- Select the sub groups that you wish to run the **Postcode Catchment** process for. To run the process for the entire transfer group, select the **Select All** check box.
- Click the Select button to close the dialog and return to the **Students** tab. The **Pre-Process** hyperlink and **Process** button are displayed.

**Pre-Offer Processing** [Hide](#)

Feeder Receiver   
 Catchments & Distances   
 Copy Applicant Reasons

Automatically Generate System Preference(s)

GIS Catchment   
 GIS Routes & Distances

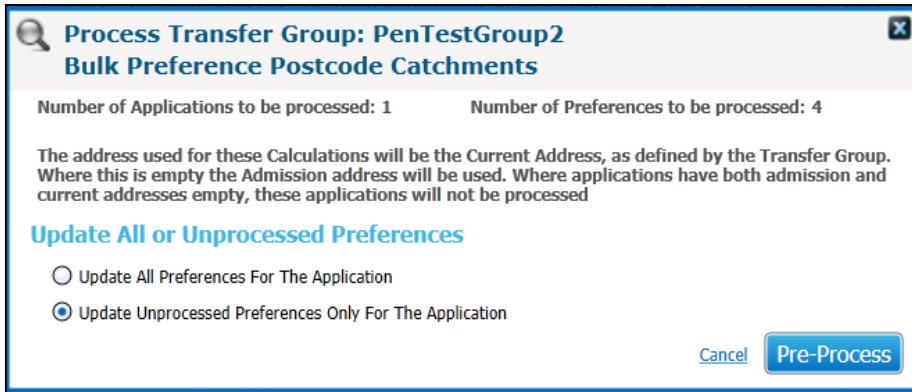
Postcode Catchment   
 Direct Distances

[View Error / Status Log](#)

Sub Groups [Edit](#)

[Pre-Process](#)

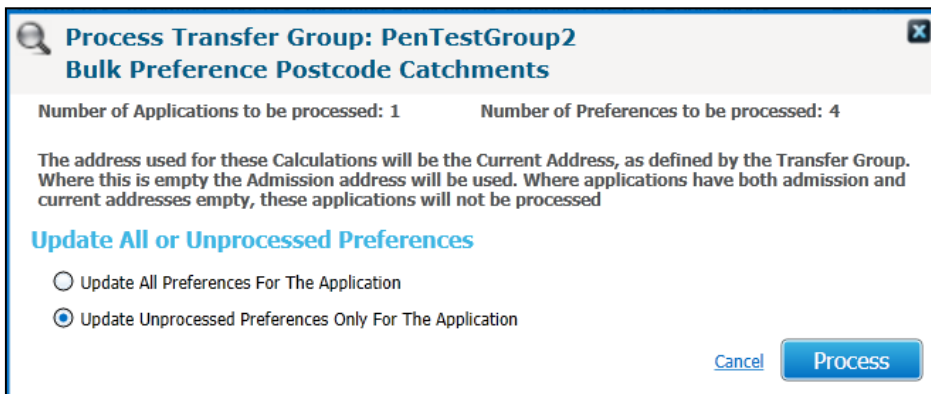
- If you wish to run the process without making any changes to the database (in order to validate and correct any data errors before changes are made):
  - Click the **Pre-Process** hyperlink to display the **Process Transfer Group** dialog.



- b. Select an option from the dialog:
  - **Update all Preferences for the Application:** Checks all students to determine whether each student's address falls within the catchment area of their preferences.
  - **Update Unprocessed Preferences only for the Application:** Carries out the same check as **Update all Preferences for the Application**, but is only run for students who have a status of **Not Processed**.
- c. Click the **Pre-Process** button to close the dialog and run the Postcode Catchment process without changing the database. The **Error / Status** log is updated with the outcome of the checks.

9. Once you have corrected any validation errors, run the Postcode Catchment process:

- a. Click the **Process** button to display the Process Transfer Group dialog.



- b. Select an option from the dialog:
  - **Update all Preferences for the Application:** Checks all students to determine whether each student's address falls within the catchment area of their preferences.
  - **Update Unprocessed Preferences only for the Application:** Carries out the same check as **Update all Preferences for the Application**, but is only run for students who have a status of **Not Processed**.
- c. Click the **Process** button to close the dialog and run the Postcode Catchment process. The **Error / Status** log is updated as the process runs.



## Running the GIS Routes and Distances Process

The GIS Routes and Distances process calculates routes and distances from home to school based on geocoded addresses. This process uses the easting and northing of either the student's admissions or correspondence address, depending on whether the **Use Admissions Address** check box is selected for the transfer group. If the process is run before applications have been added then the current correspondence address is used, as an admissions address will not yet have been added. Applications that have neither an admissions nor a current address are not processed.

The following conditions must be met in order to use the GIS Routes and Distances process:

- **Use GIS** must be selected for the transfer group. For more information on **Use GIS**, see [Adding Basic Details \(Phased\)](#) on page 83.
- Each student must have a geocoded correspondence and / or admission address.
- The bases to be used in the process must be geocoded. If any sites/gates have not been geocoded then preferences for those bases are skipped and an entry is made in the error log.

To run the GIS Routes and Distances process:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Students** tab is open and the **Pre-Offer Processing** section is open, then select the **Catchments & Distances** radio button. Additional fields related to the Catchments & Distances processes are displayed.

The screenshot shows the 'Pre-Offer Processing' section with the following options:

- Feeder Receiver
- Catchments & Distances
- Copy Applicant Reasons
- Automatically Generate System Preference(s)
- GIS Catchment
- GIS Routes & Distances
- Postcode Catchment
- Direct Distances

At the bottom, there is a link: [View Error / Status Log](#)

3. If required, select the **Automatically Generate System Preferences** check box.

If this check box is selected, One creates a system-generated preference for each school that the student's address is in catchment for.

If this check box is not selected, the process runs without creating any preferences. Running the process without creating preferences can help you to validate whether or not a student's address lies within the catchment area of their preference schools.

4. Select the **GIS Routes & Distances** radio button. The **Select Sub Group** browse is displayed.

The screenshot shows the 'Pre-Offer Processing' section with the following options:

- Feeder Receiver
- Catchments & Distances
- Copy Applicant Reasons
- Automatically Generate System Preference(s)
- GIS Catchment
- GIS Routes & Distances
- Postcode Catchment
- Direct Distances

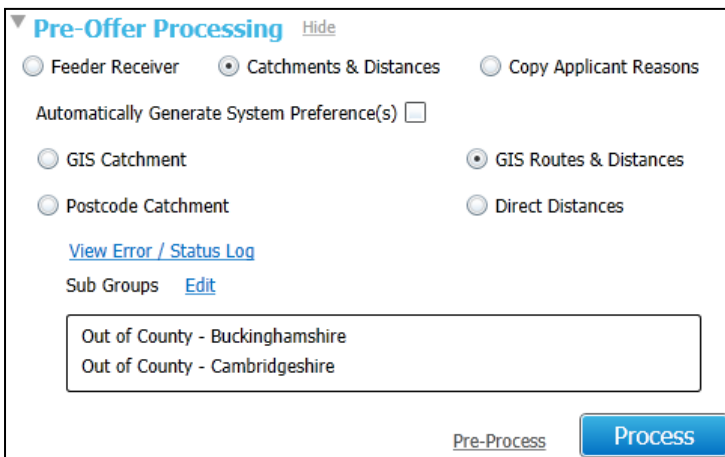
At the bottom, there is a link: [View Error / Status Log](#)

Below the link is a browse field:  with a search icon and an asterisk.

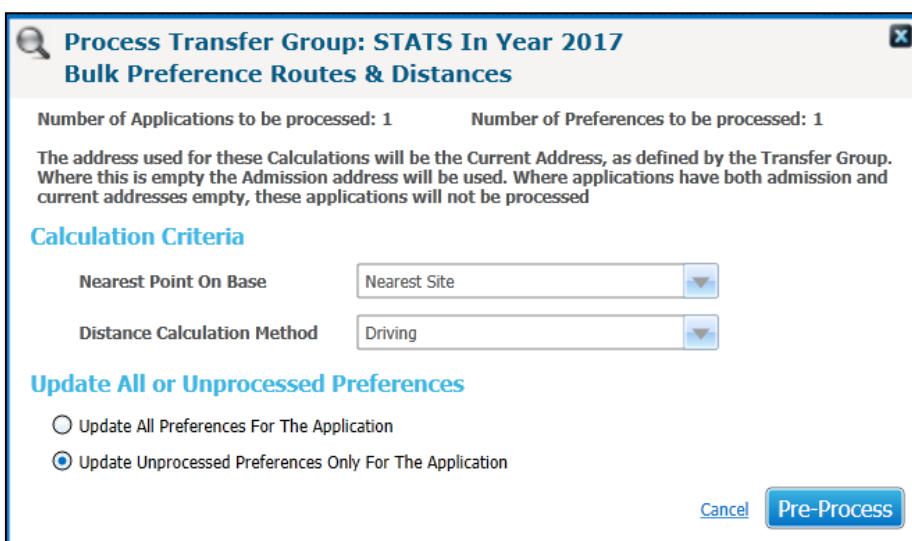
- Click the **Select Sub Group** browse to display the **Choose Sub Groups** dialog.



- Select the sub groups that you wish to run the **GIS Routes & Distances** process for. To run the process for the entire transfer group, select the **Select All** check box.
- Click the **Select** button to close the dialog and return to the **Students** tab. The **Pre-Process** hyperlink and **Process** button are displayed.



- If you wish to run the process without making any changes to the database (in order to validate and correct any data errors before changes are made):
  - Click the **Pre-Process** hyperlink to display the **Process Transfer Group** dialog.



- Select the point of the base that you wish to measure distance to from the **Nearest Point on Base** drop-down menu. The available options are:

## Making Offers

- **Nearest Site:** One ignores any geocoded gates.
  - **Nearest Gate:** One ignores any geocoded sites.
  - **Nearest Gate or Site:** If both are geocoded One uses whichever is nearest to the student's address
  - **Nearest Gate, if no Gate then Nearest Site:** One looks for a geocoded gate first. If both gate and site are geocoded then One uses the gate in preference.
- c. Select a **Distance Calculation Method** from the drop-down menu. The available options are:
- **Driving.**
  - **Walking:** There must be a safe walking route network map for the Local Authority area within the GIS utility in order to use **Safe Walking Distance**.
  - **Direct:** Calculates a straight line distance between the student's address and the base, using curved earth.
- d. Select an option from the **Update All or Unprocessed Preferences** section:
- **Update all Preferences for the Application:** Calculates (or recalculates) and overwrites all distances to preferences. Also updates the catchment flag.
  - **Update Unprocessed Preferences only for the Application:** Calculates distances only for those preferences where distances have not previously been calculated.
- e. Click the **Pre-Process** button to run the GIS Routes & Distances process without changing the database. The Error / Status log is updated with the outcome of the calculations.
9. Once you have corrected any validation errors, run the **GIS Routes & Distances** process:
- a. Click the **Pre-Process** hyperlink to display the **Process Transfer Group** dialog.

**Process Transfer Group: STATS In Year 2017**  
**Bulk Preference Routes & Distances**

Number of Applications to be processed: 1      Number of Preferences to be processed: 1

The address used for these Calculations will be the Current Address, as defined by the Transfer Group. Where this is empty the Admission address will be used. Where applications have both admission and current addresses empty, these applications will not be processed

**Calculation Criteria**

Nearest Point On Base      Nearest Site

Distance Calculation Method      Direct

**Update All or Unprocessed Preferences**

Update All Preferences For The Application

Update Unprocessed Preferences Only For The Application

Cancel      Process

- b. Select the point of the base that you wish to measure distance to from the **Nearest Point on Base** drop-down menu. The available options are:
- **Nearest Site:** One ignores any geocoded gates.
  - **Nearest Gate:** One ignores any geocoded sites.
  - **Nearest Gate or Site:** If both gate and site are geocoded then One uses whichever is nearest
  - to the student's address.

- **Nearest Gate, if no Gate then Nearest Site:** One looks for a geocoded gate first. If both gate and site are geocoded then One uses the gate in preference.
- c. Select a **Distance Calculation Method** from the drop-down menu. The available options are:
- **Driving**
  - **Walking:** There must be a safe walking route network map for the Local Authority area within the GIS utility in order to use **Safe Walking Distance**.
  - **Direct:** Calculates a straight line distance between the student's address and the base, using curved earth.
- d. Select an option from the **Update All or Unprocessed Preferences** section:
- **Update all Preferences for the Application:** Calculates (or recalculates) and overwrites all distances to preferences. Also updates the catchment flag.
  - **Update Unprocessed Preferences only for the Application:** Calculates distances only for those preferences where distances have not previously been calculated.
- e. Click the **Process** button to run the **GIS Routes & Distances** process. The **Error / Status** log is updated with the outcome of the calculations.

**NOTE:** The GIS Routes & Distances process only considers currently active sites and open gates, except where the gate or site is currently inactive but will be open at the time the student would start. For In Year transfer groups, the start date is calculated from the date that the place is required. For Normal Phased transfer groups, One uses the start of the academic year that the places would be taken up.

## Running the Direct Distances Process

The Direct Distances process calculates routes and distances from home to school based on geocoded addresses. It is similar to the GIS Routes and Distances process, except it can be run on transfer groups that do not have **Use GIS** selected. However, it can only process direct distances, as opposed to driving or walking distances.

This process uses the easting and northing of either the student's admissions or correspondence address, depending on whether the **Use Admissions Address** check box is selected for the transfer group. If the process is run before applications have been added then the current correspondence address is used, as an admissions address will not yet have been added. Applications that have neither an admissions nor a current address are not processed.

The following conditions must be met in order to use the Direct Distances process:

- Each student must have a geocoded correspondence and / or admission address.
- The bases to be used in the process must be geocoded. If any sites/gates have not been geocoded then preferences for those bases are skipped and an entry is made in the error log.

To run the Direct Distances process:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Students** tab is open and the **Pre-Offer Processing** section is open, then select the **Catchments & Distances** radio button. Additional fields related to the Catchments & Distances processes are displayed.

## Making Offers

Students Tests In Year E-App Settings Sub Groups (14) Coordinating LAs Feeders

1 student in this Transfer Group Wide View

**Pre-Offer Processing** Hide

Feeder Receiver
  Catchments & Distances
  Copy Applicant Reasons

Automatically Generate System Preference(s)

GIS Catchment
  GIS Routes & Distances

Postcode Catchment
  Direct Distances

[View Error / Status Log](#)

3. If required, select the **Automatically Generate System Preferences** check box.

If this check box is selected, One creates a system-generated preference for each school that the student's address is in catchment for.

If this check box is not selected, the process runs without creating any preferences. Running the process without creating preferences can help you to validate whether or not a student's address lies within the catchment area of their preference schools.

4. Select the **Direct Distances** radio button. The **Select Sub Group** browse is displayed.

**Pre-Offer Processing** Hide

Feeder Receiver
  Catchments & Distances
  Copy Applicant Reasons

Automatically Generate System Preference(s)

GIS Catchment
  GIS Routes & Distances

Postcode Catchment
  Direct Distances

[View Error / Status Log](#)

Select Sub Group \*

5. Click the **Select Sub Group** browse to display the **Choose Sub Groups** dialog.

**Choose Sub Groups**

Select the Sub Groups from the list of available Sub Groups below

Filter  Flag Catchment  Yes  No  Both

Select All

Group	Flag Catchment
<input type="checkbox"/> Out of County - Buckinghamshire	Yes
<input type="checkbox"/> Out of County - Cambridgeshire	Yes

6. Select the sub groups that you wish to run the Direct Distances process for. To run the process for the entire transfer group, select the **Select All** check box.
7. Click the **Select** button to close the dialog and return to the **Students** tab. The **Pre-Process** hyperlink and **Process** button are displayed.

8. If you wish to run the process without making any changes to the database (in order to validate and correct any data errors before changes are made):
  - a. Click the **Pre-Process** hyperlink to display the **Process Transfer Group** dialog.

- b. Select the point of the base that you wish to measure distance to from the **Nearest Point on Base** drop-down menu. The available options are:
      - **Nearest Site:** One ignores any geocoded gates.
      - **Nearest Gate:** One ignores any geocoded sites.
      - **Nearest Gate or Site:** If both are geocoded One uses whichever is nearest to the student's address.
      - **Nearest Gate, if no Gate then Nearest Site:** One looks for a geocoded gate first. If both gate and site are geocoded then One uses the gate in preference.
    - c. Select an option from the **Update All or Unprocessed Preferences** section:
      - **Update all Preferences for the Application:** Calculates (or recalculates) and overwrites all distances to preferences. Also updates the catchment flag.
      - **Update Unprocessed Preferences only for the Application:** Calculates distances only for those preferences where distances have not previously been calculated.
    - d. Click the **Pre-Process** button to run the **Direct Distances** process without changing the database. The **Error / Status** log is updated with the outcome of the calculations.
9. Once you have corrected any validation errors, run the **Direct Distances** process:
  - a. Click the **Pre-Process** hyperlink to display the **Process Transfer Group** dialog.

- b. Select the point of the base that you wish to measure distance to from the **Nearest Point on Base** drop-down menu. The available options are:
  - **Nearest Site:** One ignores any geocoded gates.
  - **Nearest Gate:** One ignores any geocoded sites.
  - **Nearest Gate or Site:** If both gate and site are geocoded then One uses whichever is nearest to the student's address.
  - **Nearest Gate, if no Gate then Nearest Site:** One looks for a geocoded gate first. If both gate and site are geocoded then One uses the gate in preference.
- c. Select an option from the **Update All or Unprocessed Preferences** section:
  - **Update all Preferences for the Application:** Calculates (or recalculates) and overwrites all distances to preferences. Also updates the catchment flag.
  - **Update Unprocessed Preferences only for the Application:** Calculates distances only for those preferences where distances have not previously been calculated.
- d. Click the **Process** button to run the **Direct Distances** process. The **Error / Status** log is updated with the outcome of the calculations.

**NOTE:** *The Direct Distances process only considers currently active sites and open gates, except where the gate or site is currently inactive but will be open at the time the student would start. For In Year transfer groups, the start date is calculated from the date that the place is required. For Normal Phased transfer groups, One uses the start of the academic year that the places would be taken up.*

## Running the Copy Applicant Reasons Process

Applicant reasons are those preference reasons that are expressed by the applicant, either online or on a paper application form. These reasons must be validated before they can be used to rank applications. Reasons are marked as validated by copying them to the **LA Reasons** fields, which are displayed in the **Preference Details** screen.

You can copy an individual student's reasons using the Copy Applicant Reasons function on the **Applicant Details** page. For more information on this process, see [Running the Copy Applicant Reasons Process](#) on page 154.

Alternatively, you can use the Copy Applicant Reasons process to copy reasons for all the students in a particular transfer group.

**NOTE:** You should verify the preference reasons given by applicants before running the Copy Applicant Reasons process.

To run the Copy Applicant Reasons process:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Students** tab is selected and that the **Pre-Offer Processing** section is open, then select the **Copy Applicant Reasons** radio button. The **Process** button is displayed.

The screenshot shows a section titled "Pre-Offer Processing" with a "Hide" link. Below the title are three radio buttons: "Feeder Receiver", "Catchments & Distances", and "Copy Applicant Reasons". The "Copy Applicant Reasons" radio button is selected. Below the radio buttons is a blue "Process" button.

3. Click the **Process** button. All applicant reasons except for **Catchment, Feeder Link, Special Reasons 1, 2 and 3** (and their **Weighting**) and **Memos** are copied to the **LA Reasons** fields for each student in the transfer group.

If the Make Offers, Resolve Offers or Final Allocation processes have already been run, then you are warned about possible inconsistencies when you click the **Process** button, as the Copy Applicant Reasons routine overwrites existing preference reasons. Click the **Continue** button to run the process.

One displays a confirmation message displaying the number of students that were affected once the process is complete.

**NOTE:** The **Catchment, Feeder Link, Special Reasons 1, 2 and 3** (and their **Weighting**) and **Memos** are never overwritten and must be manually changed if necessary.

## Running the Make Offers Routine

The Make Offers routine is the first stage in the process of creating offers for students based on their preferences and on the oversubscription criteria set for each sub group.

When you click the Make Offers button, One runs a series of data validation checks, and then makes an offer up to either the Published Admissions Number (for Normal Phased transfer groups) or the vacancies number (for In Year transfer groups), based on the ordered list of students applying to the school. For **Edit Rank** schools the order is based on the previously added rank, while for LA maintained schools the list is sorted according to oversubscription criteria.

**NOTE:** The Make Offers process only runs against preferences for bases that are receivers within the home local authority.

Make Offers is normally run only once for Normal Phased transfer groups, but is usually run multiple times for In Year transfer groups. There can be multiple process periods for an In Year transfer group, so it is likely that the portion of the allocation process between Make Offers and Final Allocation will be run multiple times for the transfer group over the course of an academic year.



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The following conditions must be met before the Make Offers routine can be run:

- Applications for Home LA schools that are marked **Edit Rank** should be given the ranking information provided by the Other Admission Authority school, either manually or by importing an ASL file.
- If your LA has previously been through an iteration of Make Offers, Resolve Offers and Final Allocation for a particular In Year group process period, then you must run the In Year Reset process in order to be able to run Make Offers again. For more information on running the In Year Reset process, see [Running In Year Reset](#) on page 207.

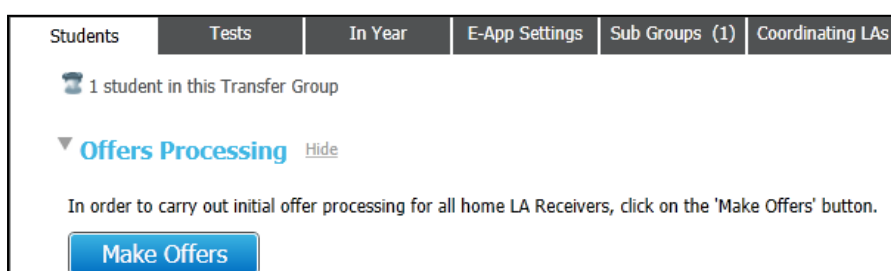
**NOTE:** While you can run the Make Offers routine without running the Student Selection or Pre-Offer processes (i.e. the Feeder Receiver, Catchments & Distances and Copy Applicant Reasons processes), running these routines may help you to make the student allocation process more efficient.

Preferences that meet any of the following criteria are not included in the Make Offers process:

- Preferences that already have a status of **R** (refused by LA) or **X** (refused by parent).
- System-generated preferences (i.e. those preferences where the preference number is greater than or equal to the transfer group process start number).
- Preferences that are associated with withdrawn applications.

To run the Make Offers routine:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Offers Processing** section.



3. Click the **Make Offers** button to begin the routine.

The Make Offers routine differs significantly depending on whether it is run for a Normal Phased or In Year transfer group, and whether or not the transfer group includes banded receivers. See the following topics for specific details on the actions that One takes in each of these scenarios:

- For Normal Phased, unbanded transfer groups, see [Explanation of the Make Offers Process \(Phased\)](#) on page 157.
- For In Year transfer groups, see [Explanation of the Make Offers Process \(In Year\)](#) on page 158.
- For transfer groups including bases using ability banding, see [Explanation of Make Offers for Ability Banded Receivers](#) on page 160.
- For transfer groups including bases using aptitude banding, see [Explanation of Make Offers for Aptitude Banded Receivers](#) on page 162.
- For transfer groups including bases using discrete banding, see [Explanation of Make Offers for Discrete Banded Receivers](#) on page 163.
- For transfer groups including bases using fair banding, see [Explanation of Make Offers for Fair Banded Receivers](#) on page 164.

- For transfer groups including bases using a combination of ability and discrete banding, see [Explanation of Make Offers for Receivers Using Ability and Discrete Banding](#) on page 166.
- For transfer groups including bases using a combination of aptitude and discrete banding, see [Explanation of Make Offers for Receivers Using Aptitude and Discrete Banding](#) on page 166.
- For transfer groups including bases using a combination of aptitude and fair banding, see [Explanation of Make Offers for Receivers Using Aptitude and Fair Banding](#) on page 167.

## Explanation of the Make Offers Process (Phased)

When you run the Make Offers routine for a Normal Phased transfer group that does not have banding set up, One takes the following actions:

1. One carries out the following checks:
  - One checks that all Home LA receivers in the transfer group have a PAN defined for the transfer group's intake NCY. If any such bases are found, then One displays a dialog listing the receivers that do not have a PAN defined:
    - To continue with the routine, click the Continue button. One treats any bases without a PAN as though there were no places available at that school.
    - To close the dialog and cancel the routine, click the Cancel hyperlink. Cancelling the routine gives you the opportunity to set a PAN for any bases that require one. For more information on setting the PAN, see [Edit PAN Details for an Academic Year](#) on page 229.
  - One checks for any existing preferences that are for non-OAA receivers in the transfer group and have a status of **Allocated**, **Accepted** or **Provisional**.  
If any such preferences are found, then One cancels the process and displays an error message reading: "Allocations already exist in Transfer Group, cannot run Make Offers". Click the **OK** button to close the dialog.  
You must change the status of any **Allocated**, **Accepted** or **Provisional** preferences before you can run Make Offers for a transfer group. For more information on editing preference status manually, see [Editing Application Preferences](#) on page 25.
  - One checks for any receivers that are in sub groups marked as **Do Not Include In Offer Processing**. Receivers in these sub groups are not included in either the Make Offers or Resolve Offers routines.
2. One clears any existing offer statuses that are not either **R** (refused by LA) or **X** (refused by parent).
3. One deletes any existing preferences for the transfer group's No Application and No Offer bases.
4. One checks to see whether any of the parental preferences are flagged as late. If any late applications are found, a dialog is displayed:
  - To include late applications in the Make Offers process, click the **Yes** button. The way in which One treats late applications depends on whether **Late** is selected as an oversubscription criterion:

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- If **Late** is selected as an oversubscription criterion, then those records with a **Late** flag set to **False** are sorted before those records with a **Late** flag set to **True**. Each group is then sorted according to the oversubscription criteria set up in **Process | Transfer Groups | Subgroups | Oversubscription Criteria**.
  - If **Late** is not selected as an oversubscription criterion, then the records are sorted by the existing oversubscription criteria only. The **Late** flag is not taken into account.
- To include late applications from the Make Offers process altogether, click the **No** button.
5. One adds any applications with no parental preferences to the No Application base, with a status of **O** (Offer).
  6. One offers places to the students, up to the maximum number allowed by the PAN. Once this process is complete, you are left with a ranked list of students within each sub group. Students within the PAN have a status of **O** (Offer), while students outside of the PAN have a status of **N** (No Current Offer). The process of offering places runs as follows:
    - a. Students are associated to receivers, based on the preference reasons shown on the **Application Details** screen.
    - b. The students are sorted by the oversubscription criteria.

One first sorts all students on the first criterion. Within each set of that first criterion, students are then sorted on the second criterion. Within each set of the second criterion, the students are then sorted on the third criterion, and so on until the students have been sorted by all the criteria defined for the group. Students are then sorted in sets of the last criterion by surname.

During sorting, a rank is recorded for each processed preference at each Home LA school that is not an OAA receiver. This information is stored in the CHOICES.OFFER\_RANK table.
    - c. One carries out a gender check for each student.

If the student's gender does not match that of the receiver, and the receiver is not an OAA school, then the student is given a status of **R** (Rejected) against that receiver. This does not apply to OAA schools, as OAA schools make their own decisions regarding student rankings. As such, One does not refuse places at OAA schools based on gender.
    - d. One sorts the students applying to **Edit Rank** schools by rank.

**NOTE:** One sets the allocation status of any students in the unranked group (i.e. those students who are not in a priority group and are therefore unlikely to be offered a place) who have a preference for an **Edit Rank** school to **R** (Refused by Local Authority). These students do not have a One rank added on import, so there is no rank against the preference. Consequently, a place is not allocated.

If the student is subsequently exported in an ALT file, then their allocation status is mapped to **N** (No current offer).
    - e. One assigns a status of **O** (Offer) to those students within the PAN, and a status of **N** (No Current Offer) to those students who are not within the PAN.
  7. One identifies any students who do not yet have an offer and assigns them to the No Offer base.
  8. One updates the status of any withdrawn applications that have preferences that are not for the Withdrawn base to **Q** (No Longer Required).
  9. One displays a message indicating the number of students that were processed.

## Explanation of the Make Offers Process (In Year)

When you run the Make Offers routine for an In Year transfer group, One takes the following actions:

1. One carries out the following checks:
  - One checks all Home LA receivers in the transfer group to see if they have vacancies for the current process period (i.e. the process period whose **Application Closing Date** most recently passed). One then displays a list of receivers with vacancies for the current process period and the NCYs in which those vacancies occur.
    - To continue with the routine, click the **Continue** button. One assumes that any bases without vacancy numbers do not have places available.
    - To close the dialog and cancel the routine, click the **Cancel** hyperlink. Cancelling the routine gives you the opportunity to set vacancy numbers for any bases that require them. For more information on setting vacancy numbers, see [Set Vacancy Details](#) on page 233.
  - One checks any non-OAA receivers with vacancies for any existing preferences that have a status of **Allocated**, **Accepted** or **Provisional**.
    - If any such preferences are found, then One cancels the process and displays an error message reading: "Allocations already exist in Transfer Group, cannot run Make Offers". Click the **OK** button to close the dialog.
    - You must change the status of any active **Allocated**, **Accepted** or **Provisional** preferences for non-OAA receivers that have vacancies before you can run Make Offers for an In Year transfer group. For more information on editing preference status manually, see [Editing Application Preferences](#) on page 25.
  - One checks for any receivers that are in sub groups marked as **Do Not Include In Offer Processing**. Receivers in these sub groups are not included in either the Make Offers or Resolve Offers routines.
2. One clears any existing offer statuses, except the statuses of offers that meet at least one of the following criteria:
  - The offer has a status of **R** (refused by LA).
  - The offer has a status of **X** (refused by parent).
  - The offer relates to an application with an external close of **CLOS**.

**NOTE:** Applications with a status of **R** or **X**, or an application status external code of **CLOS**, are not processed by the Make Offers routine for In Year transfer groups.
3. One deletes any existing preferences for the transfer group's No Application and No Offer bases.
4. One checks the dates of the applications. Applications meeting either of the following criteria are ignored by the routine:
  - Applications with a **Place Required** date that is after the **Offer** date for the selected process period.
  - Applications that were entered / received after the **Application Closing Date**.
5. One adds any applications with no parental preferences to the No Application base, with a status of **O** (Offer).
6. One offers places to the students, up to the vacancy number. Once this process is complete, you are left with a ranked list of students within each sub group. Students ranked within the vacancy number have a status of **O** (Offer), while students ranked outside of the vacancy number have a status of **N** (No Current Offer). The process of offering places runs as follows:
  - a. Students are associated to receivers, based on the preference reasons shown on the **Application Details** screen.
  - b. The students are sorted by the oversubscription criteria.

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One first sorts all students on the first criterion. Within each set of that first criterion, students are then sorted on the second criterion. Within each set of the second criterion, the students are then sorted on the third criterion, and so on until the students have been sorted by all the criteria defined for the group. Students are then sorted in sets of the last criterion by surname.

During sorting, a rank is recorded for each processed preference at each Home LA school that is not an OAA receiver. This information is stored in the CHOICES.OFFER\_RANK table.

- c. One carries out a gender check for each student.

If the student's gender does not match that of the receiver, and the receiver is not an OAA school, then the student is given a status of **R** (Rejected) against that receiver. This does not apply to OAA schools, as OAA schools make their own decisions regarding student rankings. As such, One does not refuse places at OAA schools based on gender.

- d. One sorts the students applying to **Edit Rank** schools by rank.

**NOTE:** One sets the allocation status of any students in the unranked group (i.e. those students who are not in a priority group and are therefore unlikely to be offered a place) who have a preference for an **Edit Rank** school to **R** (Refused by Local Authority). These students do not have a One rank added on import, so there is no rank against the preference. Consequently, a place is not allocated.

If the student is subsequently exported in an ALT file, then their allocation status is mapped to **N** (No current offer).

- e. One assigns a status of **O** (Offer) to those students ranked within the vacancy number, and a status of **N** (No Current Offer) to those students who are not ranked within the vacancy number.
- 7. All In Year students who were processed by the Make Offers routine and have an application status mapped to an external code of **PEND** (Pending) have their application status updated to the internal code of **PROC** (Processing, offer to applicant not yet made). Students whose application statuses are not mapped to **PEND** are not affected.
  - 8. One displays a message indicating the number of students that were processed.

## Explanation of Make Offers for Ability Banded Receivers

The Make Offers routine for banded receivers is identical to the routine for phased, non-banded receivers up to the point where applications with no parental preferences are added to the No Application base (step 5 of the process as detailed in [Explanation of the Make Offers Process \(Phased\)](#) on page 157).

However, One uses a different process to allocate students to banded receivers, as opposed to non-banded receivers. Furthermore, the allocation process for banded schools differs depending on whether the school in question is an **Edit Rank** school or not. The process below details the routines One uses to allocate students to bases where Ability banding is in use.

For more information on Ability banding, see [Explanation of Banding](#) on page 230.

**NOTE:** The highest priority band in an Ability banded receiver must be marked as **Assessed** in the Band Details screen. This band depends on ability (i.e. the school is offering a number of places for students who are tested). The mainstream part of the school is represented by a lower priority band that is not marked as **Assessed**. All bases that use Ability banding always have only one assessed band and one non-assessed band.

For more information on configuring banding, see [Adding Bands to an NCY](#) on page 232.

### Non-Edit Rank Receivers

1. One checks whether test results exist for each child who has applied for the assessed band at the base, and then ranks the children by test result.
2. One ranks the children who have applied for the assessed band by the remaining oversubscription criteria (i.e. the students are sorted on the second oversubscription criterion within sets of each test result, then sorted on the third criterion in sets of the second criterion, and so on).  
If no oversubscription criteria have been defined, the children are ranked based on test results alone.
3. One makes offers for the assessed band up to that band's PAN. Students ranked within the band PAN are given a status of **O** (Offer), while students ranked outside the PAN are given a status of **N** (No Current Offer).
4. One creates a band record in the non-assessed band for those students who were not offered a place in the assessed band but have indicated that they also wish to be considered for the mainstream school (i.e. the student does not have the **Do Not Consider For Mainstream School** preferences reason selected).
5. One sorts the children in the non-assessed band by oversubscription criteria.
6. One makes offers for the non-assessed band, up to the PAN of that band.
7. One resolves offers for students who applied to both bands.
  - If the student's offer status is **O** (Offer) in the higher priority band then One updates the lower priority band offer status for the same preference to **Q** (No Longer Required).
  - If the student's offer status is **N** (No Current Offer) in the higher priority band, but **O** (Offer) in the lower priority band, then the **N** status in the higher band is retained.
  - If the student is offered a place in either of the bands then the main preference offer status is updated to **O** (Offer). If the student receives **N** (No Current Offer) in both bands, then the main preference offer status is updated to **N** (No Current Offer).

### Edit Rank Receivers

1. One checks whether test results exist for each child who has applied for the assessed band at the base. Student without test results are not considered for the assessed band.
2. One sorts any ranked preferences for a home LA school which uses ability banding in an **Edit Rank** subgroup. These preferences are sorted according to the existing band rank.
3. One updates student offer statuses for the assessed band:
  - Students ranked within the band PAN are given a status of **O** (Offer).
  - Students ranked below the band PAN are given a status of **N** (No Current Offer).
  - Unranked preferences for a **Home LA** school that uses Ability banding in an **Edit Rank** subgroup are updated to **R** (Refused by LA).
4. One processes the students who applied for the non-assessed band.

**NOTE:** Students for whom **Do Not Consider For Mainstream** is not selected and who are not offered a place in the assessed band at an **Edit Rank** school are not automatically added to the lower band. It is up to the school to rank these students.

5. One resolves offers for students who applied to both bands:
  - If the student's offer status is **O** (Offer) in the higher priority band, then One updates the lower priority band offer status for the same preference to **Q** (No Longer Required).

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- If the student's offer status is **N** (No Current Offer) in the higher priority band, but **O** (Offer) in the lower priority band, then the N status in the higher band is retained.
- If the student is offered a place in either of the bands then the main preference offer status is updated to **O** (Offer). If the student gets **N** (No Current Offer) in both bands, then the main preference offer status is updated to **N** (No Current Offer).

**NOTE:** All changes to the main offer status are reflected in the **Preference History**.

## Explanation of Make Offers for Aptitude Banded Receivers

The Make Offers routine for banded receivers is identical to the routine for phased, non-banded receivers up to the point where applications with no parental preferences are added to the No Application base (step 5 of the process as detailed in [Explanation of the Make Offers Process \(Phased\)](#) on page 157).

However, One uses a different process to allocate students to banded receivers, as opposed to non-banded receivers. Furthermore, the allocation process for banded schools differs depending on whether the school in question is an **Edit Rank** school or not. The process below details the routines One uses to allocate students to bases where aptitude banding is in use.

For more information on aptitude banding, see [Explanation of Banding](#) on page 230.

**NOTE:** Schools using aptitude banding must have at least two bands: one aptitude (this would normally be a level 1, highest priority band) and one mainstream (non-aptitude). If a school has more than one specialism (for example Music and Art) then it can have a level 1 band for each specialism. In this case children are considered for bands based upon the priority defined by the applicant rather than the priority of the aptitude bands defined for the school.

Unlike assessed ability banding, One does not check for test scores for aptitude bands, although LAs can use test scores in the oversubscription criteria for the aptitude band if they wish.

### Non-Edit Rank Receivers

1. If the school has more than one aptitude band, then the children are sorted according to the band with the highest priority on their application.
2. One ranks the children who have applied for the aptitude band(s) by the oversubscription criteria defined for the band(s), or by the sub group oversubscription criteria if these criteria have been indicated in the band details. The students are sorted on the first oversubscription criterion, then sorted on the second criterion in sets of the first, and so on.
3. One makes offers for the aptitude band(s) up to the PAN. Students ranked within the band PAN are given a status of **O** (Offer), while students ranked outside the PAN are given a status of **N** (No Current Offer).
4. One creates a band record in the mainstream band for those students who were not offered a place in the aptitude band(s) but have indicated that they also wish to be considered for the mainstream school (i.e. the student does not have the **Do Not Consider For Mainstream School** preferences reason selected).
5. One sorts the children in the mainstream band by oversubscription criteria.
6. One makes offers for the mainstream band, up to the PAN of that band.
7. One resolves offers for students who applied to more than one band.
  - If the student's offer status is **O** (Offer) in the higher priority band then One updates the lower priority band offer status for the same preference to **Q** (No Longer Required).
  - If the student's offer status is **N** (No Current Offer) in the higher priority band, but **O** (Offer) in the lower priority band, then the **N** status in the higher band is retained.

- If the student is offered a place in either of the bands then the main preference offer status is updated to **O** (Offer). If the student receives **N** (No Current Offer) in both bands, then the main preference offer status is updated to **N** (No Current Offer).

### Edit Rank Receivers

1. If the school has more than one aptitude band, then the children are sorted according to the band with the highest priority on their application.
2. One sorts any ranked preferences for a home LA school which uses aptitude banding in an **Edit Rank** subgroup. These preferences are sorted according to the existing band rank.
3. One updates student offer statuses for the aptitude band(s):
  - Students ranked within the band PAN are given a status of **O** (Offer).
  - Students ranked below the band PAN are given a status of **N** (No Current Offer).
  - Unranked preferences for a Home LA school that uses aptitude banding in an **Edit Rank** subgroup are updated to **R** (Refused by LA).
4. One processes the students who applied for the mainstream band.

**NOTE:** Students for whom **Do Not Consider For Mainstream** is not selected and who are not offered a place in an aptitude band at an **Edit Rank** school are not automatically added to the mainstream band. It is up to the school to rank these students.

5. One resolves offers for students who applied to both bands:
  - If the student's offer status is **O** (Offer) in the higher priority band, then One updates the lower priority band offer status for the same preference to **Q** (No Longer Required).
  - If the student's offer status is **N** (No Current Offer) in the higher priority band, but **O** (Offer) in the lower priority band, then the **N** status in the higher band is retained.
  - If the student is offered a place in either of the bands then the main preference offer status is updated to **O** (Offer). If the student gets **N** (No Current Offer) in both bands, then the main preference offer status is updated to **N** (No Current Offer).

**NOTE:** All changes to the main offer status are reflected in the **Preference History**.

## Explanation of Make Offers for Discrete Banded Receivers

The Make Offers routine for banded receivers is identical to the routine for phased, non-banded receivers up to the point where applications with no parental preferences are added to the No Application base (step 5 of the process as detailed in [Explanation of the Make Offers Process \(Phased\)](#) on page 157).

However, One uses a different process to allocate students to banded receivers, as opposed to non-banded receivers. Furthermore, the allocation process for banded schools differs depending on whether the school in question is an **Edit Rank** school or not. The process below details the routines One uses to allocate students to bases where Discrete banding is in use.

For more information on Discrete banding, see [Explanation of Banding](#) on page 230.

**NOTE:** When discrete banding is used, students can only be associated with and considered for an offer in one band.



### Non-Edit Rank Receivers

1. One sorts applicants into bands, based on which set of band criteria each applicant fulfils.
2. One ranks the children applying for the highest priority band by the oversubscription criteria defined for that band, or by the sub group oversubscription criteria if these criteria have been indicated in the band details. The students are sorted on the first oversubscription criterion, then sorted on the second criterion in sets of the first, and so on.
3. One makes offers for the band up to the PAN. Students ranked within the band PAN are given a status of **O** (Offer), while students ranked outside the PAN are given a status of **N** (No Current Offer).
4. One repeats steps 2 and 3 for the lower-priority bands.

### Edit Rank Receivers

1. One sorts applicants into bands, based on which set of band criteria each applicant fulfils.
2. One sorts any ranked preferences for a home LA school which uses discrete banding in an **Edit Rank** subgroup. These preferences are sorted according to the existing band rank.
3. One updates student offer statuses for the highest priority band:
  - Students ranked within the band PAN are given a status of **O** (Offer).
  - Students ranked below the band PAN are given a status of **N** (No Current Offer).
  - Unranked preferences for a Home LA school that uses aptitude banding in an **Edit Rank** sub group are updated to **R** (Refused by LA). If a student with unranked preferences is then exported using the ALT file, the allocation status is mapped to **N** (No current offer).
4. One repeats steps 2 and 3 for the lower-priority bands.

**NOTE:** All changes to the main offer status are reflected in the **Preference History**.

## Explanation of Make Offers for Fair Banded Receivers

The Make Offers routine for banded receivers is identical to the routine for phased, non-banded receivers up to the point where applications with no parental preferences are added to the No Application base (step 5 of the process as detailed in [Explanation of the Make Offers Process \(Phased\)](#) on page 157).

However, One uses a different process to allocate students to banded receivers, as opposed to non-banded receivers. Furthermore, the allocation process for banded schools differs depending on whether the school in question is an **Edit Rank** school or not. The process below details the routines One uses to allocate students to bases where Fair banding is in use.

For more information on Fair banding, see [Explanation of Banding](#) on page 230.

**NOTE:** When fair banding is used, students can only be associated with and considered for an offer in one band.

### Non-Edit Rank Receivers

1. One sorts students into bands, based on their test scores.
2. One ranks the children who have been sorted into the highest-priority band by the oversubscription criteria (i.e. the students are sorted by the first oversubscription criterion, then sorted on the second criterion in sets of the first, and so on).
3. One makes offers for the highest-priority band up to the PAN. Students ranked within the band PAN are given a status of **O** (Offer), while students ranked outside the PAN are given a status of **N** (No Current Offer).
4. One repeats steps 2 and 3 for the remaining bands.

### Edit Rank Receivers

1. Each OAA receiver school organises students into bands, based on their test scores.
2. The receiver ranks the students in each sub group.
3. The band assignments and ranking information is passed to the Local Authority by the receiver.
4. The band assignment and ranking information is entered into Admissions and Transfers by the Local Authority. This information can either be entered manually or by importing an ASL file.

**NOTE:** *Since students have already been assigned to bands by the receiver (unlike when Make Offers is run for non-OAA receivers using fair banding – see above) there is no need for the Local Authority to assign students to bands. Any students with a preference for an OAA using fair-banding that have not been assigned to a band prior to running Make Offers are caught by the initial checking and an error is displayed.*

5. One assigns an offer status to each student that has already been assigned to one of the fair bands, based on the student's rank and the band PAN.
  - Students ranked within the band PAN are given a status of **O** (Offer).
  - Students ranked below the band PAN are given a status of **N** (No Current Offer).
  - Unranked preferences for a Home LA school that uses aptitude banding in an **Edit Rank** sub group are updated to **R** (Refused by LA). If a student with unranked preferences is then exported using the ALT file, the allocation status is mapped to **N** (No current offer).

**NOTE:** *All changes to the main offer status are reflected in the **Preference History**.*

## Explanation of Make Offers for Receivers Using Ability and Discrete Banding

When a school uses a combination of ability and discrete banding, the assessed band (level 1) is further subdivided into discrete bands (level 2). There must be at least two child bands below a parent band (i.e. you cannot create a single level 2 band under a particular level 1 band).

Level	Band Name	Band PAN	Assessed?	Level	Band Name	Band PAN	Oversubs. Criteria Applied?
1	Ability	70	Yes	2	Ability - Discrete	30	Yes
				2	Ability - Other	40	Yes
1	Non-Assessed	130	No				Yes
	<b>Total PAN</b>	<b>200</b>					

The Make Offers routine for combine ability and discrete banding runs as follows:

1. One checks that test results exist against each child who has applied for the ability band at each preference school, as in the standard ability banded process.
2. One uses the discrete band processing routine to process the discrete bands within the ability band.
3. One processes the mainstream band as per the standard ability banded process.

For more information on the Make Offers routine for ability banded receivers, see [Explanation of Make Offers for Ability Banded Receivers](#) on page 160.

For more information on the Make Offers routine for discrete banded receivers, see [Explanation of Make Offers for Discrete Banded Receivers](#) on page 163.

**NOTE:** All changes to the main offer status are reflected in the **Preference History**.

## Explanation of Make Offers for Receivers Using Aptitude and Discrete Banding

When a school uses a combination of aptitude and discrete banding, the aptitude band (level 1) is further subdivided into discrete bands (level 2). There must be at least two child bands below a parent band (i.e. you cannot create a single level 2 band under a particular level 1 band).

Level	Band Name	Band PAN	Assessed?	Level	Band Name	Band PAN	Oversubs. Criteria Applied?
1	Aptitude	20	Yes	2	Aptitude - Discrete	8	Yes
				2	Aptitude - Other	12	Yes
1	Non-Aptitude	180	No				Yes

Level	Band Name	Band PAN	Assessed?	Level	Band Name	Band PAN	Oversubs. Criteria Applied?
	<b>Total PAN</b>	<b>200</b>					

The Make Offers routine for combine aptitude and discrete banding runs as follows:

1. One uses the discrete band processing routine to process the discrete bands within the aptitude band.
2. One processes the mainstream band as per the standard aptitude banded process.

For more information on the Make Offers routine for aptitude banded receivers, see [Explanation of Make Offers for Aptitude Banded Receivers](#) on page 162.

For more information on the Make Offers routine for discrete banded receivers, see [Explanation of Make Offers for Discrete Banded Receivers](#) on page 163.

**NOTE:** All changes to the main offer status are reflected in the **Preference History**.

## Explanation of Make Offers for Receivers Using Aptitude and Fair Banding

There are two methods of banding for schools using a combination of aptitude and fair banding. The first option is to make offers for the aptitude band then make offers to the non-aptitude band based on fair banding. The second option is to use fair banding within both the aptitude and the non-aptitude bands.

### Fair Banding in the Non-Aptitude Band Only

1. One processes the children who applied for the aptitude bands as per the standard aptitude process.
2. If the receiver is a non-OAA school, One adds the children who did not get a place in the aptitude bands but stated that they wished to be considered for a place in the mainstream school as well to the applicants for the mainstream school.

See [Explanation of Make Offers for Aptitude Banded Receivers](#) on page 162 and [Explanation of Make Offers for Fair Banded Receivers](#) on page 164 for more information about the differences between OAA and non-OAA receivers during the aptitude and fair banding allocation routines.

3. The children to be considered for the mainstream band are divided up into fair bands based on their test results.
4. One processes the mainstream band as per the standard fair banding process.

Level	Band Name	Band PAN	Level	Band Name	Band PAN	Oversubs. Criteria Applied?
1	Aptitude	20				Yes
1	Non-Aptitude	180	2	NonApt - FB1	50	Yes
			2	NonApt - FB1	50	Yes
			2	NonApt - FB1	50	Yes
			2	NonApt - FB1	30	Yes
	<b>Total PAN</b>	<b>200</b>				

### Fair Banding in both the Aptitude and Non-Aptitude Bands

1. One divided the children who have applied for the aptitude bands into fair bands, based on their test results.
2. One processes the children who applied for the aptitude bands as per the standard fair banding process.
3. If the receiver is a non-OAA school, One adds the children who did not get a place in the aptitude bands but stated that they wished to be considered for a place in the mainstream school as well to the applicants for the mainstream school.

See [Explanation of Make Offers for Aptitude Banded Receivers](#) on page 162 and [Explanation of Make Offers for Fair Banded Receivers](#) on page 164 for more information about the differences between OAA and non-OAA receivers during the aptitude and fair banding allocation routines.

4. The children to be considered for the mainstream band are divided up into fair bands based on their test results.
5. One processes the mainstream band as per the standard fair banding process.

Level	Band Name	Band PAN	Level	Band Name	Band PAN	Oversubs. Criteria Applied?
1	Aptitude	20	2	Apt - FB1	7	Yes
			2	Apt - FB2	8	Yes
			2	Apt - FB3	5	Yes
1	Non-Aptitude	180	2	NonApt - FB1	50	Yes
			2	NonApt - FB2	50	Yes
			2	NonApt - FB3	50	Yes
			2	NonApt - FB4	30	Yes
	<b>Total PAN</b>	<b>200</b>				

For more information on the Make Offers routine for aptitude banded receivers, see [Explanation of Make Offers for Aptitude Banded Receivers](#) on page 162.

For more information on the Make Offers routine for fair banded receivers, see [Explanation of Make Offers for Fair Banded Receivers](#) on page 164.

**NOTE:** All changes to the main offer status are reflected in the **Preference History**.

## Running the Resolve Offers Process

The Resolve Offers routine aims to ensure that all students have an allocated (or provisionally allocated) place at one of their preference receivers (although this is not always possible).

Resolve Offers may be run multiple times as ALT files (including In Year ALT files) are imported and exported during the offer scheme process. However, the Resolve Offers routine can only be run once the Make Offers routine has been run.

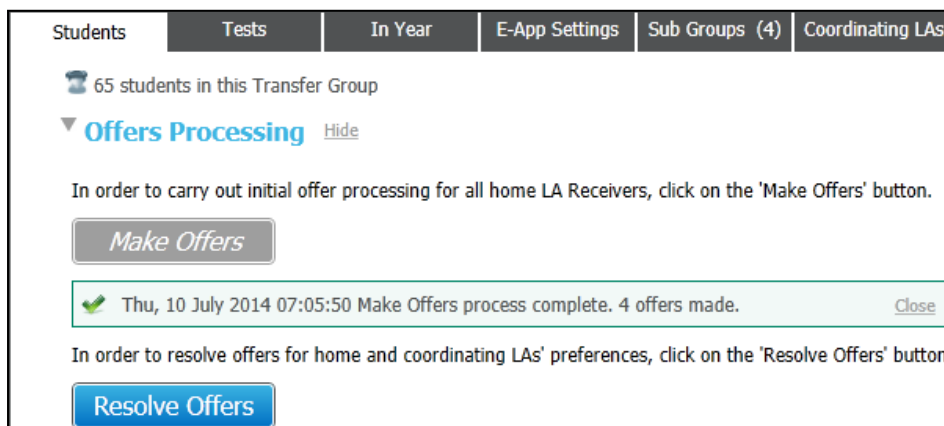
The routine looks at preferences for both home and coordinating Local Authority bases. Where students have initial offers for more than one preference, (either as part of Make Offers or from information received from other coordinating Local Authorities) then Resolve Offers marks the lower preferences as **Q** (No Longer Required) and retains the offer for the highest available preference. One then looks to offer home LA receiver places that have been freed up by this process to the next ranked student on the list, and so on.

Once the Resolve Offers routine has been run, only offers with a status of **P** (Provisional), **Q** (No Longer Required) or **Y** (Allocated) are left within the PAN. After the process has been run a number of times, a "steady state" is reached. This steady state occurs when there are no further changes in the allocation status codes and the ALT/In Year ALT file contains no students. At this point, the Final Allocations process can be run.

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To run the Resolve Offers routine:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Offers Processing** section.



3. Click the **Resolve Offers** button to run the routine.

The Resolve Offers routine differs significantly depending on whether it is run for a Normal Phased or In Year transfer group, and whether or not the transfer group includes banded receivers. See the following topics for specific details on the actions that One takes in each of these scenarios:

- For Normal Phased, unbanded transfer groups, see [Explanation of the Resolve Offers Routine \(Phased\)](#) on page 170.
- For In Year transfer groups, see [Explanation of the Resolve Offers Routine \(In Year\)](#) on page 173.
- For transfer groups including bases using ability, aptitude or discrete banding, see [The Resolve Offers Routine for Ability, Aptitude or Discrete Banded Receivers](#) on page 176.
- For transfer groups including bases using fair banding, see [The Resolve Offers Routine for Fair Banded Receivers](#) on page 178.
- For transfer groups including bases using a combination of two different types of banding, see [Resolve Offers and Banding Combinations](#) on page 182.

## Explanation of the Resolve Offers Routine (Phased)

When you run the Resolve Offers routine for a Normal Phased transfer group that does not have banding set up, One takes the following actions:

1. One stores the PAN information of all home Local Authority receiver bases in the transfer group.
2. One sets preferences that meet either of the following criteria to **Q** (No Longer Required):
  - Any preferences that are of a lower rank than the first offered place for that student.
  - Any system generated preferences with a preference number greater than the **Process Start Number**.

There are some exceptions to this process:

- One does not update preferences whose existing offer status is either **R** (Refused by LA) or **X** (Refused by Parent).
- One does not update preferences for any LAs that are not coordinating LAs associated with the transfer group.

For example, coordinating LAs are not used in Wales. In this circumstance, different LAs may each make an offer, so these offer statuses are preserved.

- If the highest offered preference is for a receiver in a subgroup that is marked as **Do not include in offer processing**, then any lower preferences are only updated to **Q** (No Longer Required) as long as they are not also part of a subgroup marked as **Do not include in offer processing**.
3. One converts all offered places for the students to either **P** (Provisional), **Y** (Allocated) or **Q** (No Longer Required). The routine used at this point differs depending whether the student's first preference is offered.

**If the first preference is offered:**

- One changes the status of the first preference from **O** (Offered) to **Y** (Allocated).
- One changes the status of any lower preferences to **Q** (No Longer Required).
- One checks the No Offer base and changes the status of **O** (Offer) to **Q** (No Longer Required), if applicable (e.g. if a late application is processed for which an offer can be made or if the LA has allocated a place at a nearby school that wasn't an originally recorded parental preference).

Preference Number	Original Offer Status	New Offer Status
1	Offered	Allocated
2	Offered	No Longer Required

**If the first preference is not offered:**

- One sets the status of the highest offered preference to **P** (Provisional).
- One changes the status of any lower preferences to **Q** (No Longer Required).
- If no offer can be made to a parental preference then One assigns a status of **O** (Offered) to the No Offer base, followed by **Q** (No Longer Required) if applicable (e.g. if a late application is processed for which an offer can be made or if the LA has allocated a place at a nearby school that wasn't an originally recorded parental preference).

Preference Number	Original Offer Status	New Offer Status
1	Not Offered	Not Offered
2	Offered	Provisional
3	Offered	No Longer Required

4. One checks the PAN to see if the current base has been filled with students who have an offer status of **O** (Offer).
- If the PAN has been reached then One begins to resolve provisional offers (detailed in step 5).
  - If the PAN has not yet been reached then One checks other home LA bases to see if any students have a provisional place that is of a lower preference number to the current



## Making Offers

preference. If any such places are found, the student is given a place at the higher preference. This preference is changed to **Y** (Allocated) if it is the student's first preference. Preferences that are not the first preference are set to **P** (Provisional).

Example 1 - A space becomes available at Base 1 for the student:

Base	Preference	Status Before Processing	Status After Processing
1	1	No Offer	Allocated
2	2	Provisional	No Longer Required

Example 2 - A space becomes available at Base 2 for the student:

Base	Preference	Status Before Processing	Status After Processing
1	1	No Offer	No Offer
2	2	No Offer	Provisional
3	3	Provisional	No Longer Required

If the student has an offer status of **Y** (Allocated) at a lower preference base and a place becomes available at a higher preference base, the student is ignored.

Example 3 - A space for the student becomes available at Base 2, but the student already has an allocated place at Base 3:

Base	Preference	Status Before Processing	Status After Processing
1	1	No Offer	No Offer
2	2	No Offer	No Offer
3	3	Allocated	Allocated

This process of freeing up places has cascade effects. For example, a place freed up for student A means that their current provisional offer can be freed up for student B, and so on. Freeing up places in this way ensures that the base and band PANs are updated to offer the maximum number of places possible before the processing has finished.

- One sets each home or coordinating LA student's highest ranked provisional preference to **Y** (Allocated). All subsequent preferences are set to **Q** (No Longer Required).
- One determines the highest ranked allocated preference for each student and sets any remaining lower preferences to **Q** (No Longer Required).

If the sub group has been set as **Maintain Waiting List** (on the **Sub Groups | Details** tab) any preferences ranked higher than the Allocated preference are recorded as **W** (Waiting List) It is assumed that, since an applicant puts their preferences in choice order, the lower ranked preferences would not be wanted.

## Imported Offers

The first time it is run, Resolve Offers only makes offers for the home Local Authority. This is because ALT files won't yet have been exchanged with other coordinating LAs.

Offers that are imported from another LA via the ALT file import process are set to a value of **P** (Provisional), regardless of whether the LA is coordinating or not. One then updates this status to **Y** (Allocated), or **Q** (No Longer Required) if necessary.

The Import / Resolve Offers / Export routines are re-run until the import files are empty and the export files no longer contain any changed records. Once this steady state has been achieved the Final Allocations process can be run. For more information on Final Allocations, see [Explanation of the Final Allocations Routine](#) on page 183.

## Explanation of the Resolve Offers Routine (In Year)

The In Year Resolve Offers routine processes each student who has at least one preference with an offer status of **O** (Offer).

Applications which meet any of the following criteria are not included in the In Year Resolve Offers routine:

- Any applications that have an **Application Status** linked to an external code of **CLOS** (Closed/completed).
- Any applications that have a **Place Required** date that is after the **Offer** date of the process period that is being processed (i.e. the process period with the most recently passed **Process Period Application Closing** date).

Furthermore, the Resolve Offers routine only updates a student's offer status to either **Y** (Allocated) or **P** (Provisional) if the application was received before or on the process period's closing date/ time.

When you run the Resolve Offers routine for a Normal Phased transfer group that does not have banding set up, One takes the following actions:

1. One stores the vacancy information of all home Local Authority receiver bases in the transfer group that are not linked to a sub group with Do not include in offer processing selected.
2. In the first run-through of the Resolve Offers routine only, One checks for students who have multiple offers for Home Local Authority receivers and then updates all preferences in these applications other than the first offered place to **Q** (No Longer Required).
3. One converts all offered places for the students to either **P** (Provisional), **Y** (Allocated) or **Q** (No Longer Required). The routine used at this point differs depending whether the students first preference is offered.

### If the first preference is offered:

- One changes the status of the first preference from **O** (Offered) to **Y** (Allocated).
- One changes the status of any lower preferences to **Q** (No Longer Required).
- One checks the No Offer base and changes the status of **O** (Offer) to **Q** (No Longer Required), if applicable (e.g. if a late application is processed for which an offer can be made or if the LA has allocated a place at a nearby school that wasn't an originally recorded parental preference).

Preference Number	Original Offer Status	New Offer Status
1	Offered	Allocated
2	Offered	No Longer Required

**If the first preference is not offered:**

- One sets the status of the highest offered preference to **P** (Provisional).
- One changes the status of any lower preferences to **Q** (No Longer Required).
- If no offer can be made to a parental preference then One assigns a status of **O** (Offered) to the No Offer base, followed by **Q** (No Longer Required) if applicable (e.g. if a late application is processed for which an offer can be made or if the LA has allocated a place at a nearby school that wasn't an originally recorded parental preference).

Preference Number	Original Offer Status	New Offer Status
1	Not Offered	Not Offered
2	Offered	Provisional
3	Offered	No Longer Required

4. One checks base vacancies to see if the current base has been filled with students who have an offer status of **O** (Offer).

- If the base vacancy number has been reached then One begins to resolve provisional offers (detailed in step 5).
- If the base vacancy number has not been reached:
  - i. One retrieves the base vacancies and subtracts the allocations count (the total of the **P**, **Y** and **A** allocations). If there are any places remaining then One lists the base as having vacancies. If the school has no children with a preference that has a status other than **P**, **Y** or **A** then the school is not listed.
  - ii. One lists any schools where there are children waiting to be offered a place and vacancies exist.
  - iii. One checks other home LA bases to see if any students have a provisional place that is of a lower preference number to the current preference. If any such places are found, the student is given a place at the higher preference. This preference is changed to **Y** (Allocated) if it is the student's first preference. Preferences that are not the first preference are set to **P** (Provisional).

Example 1 - A space becomes available at Base 1 for the student:

Base	Preference	Status Before Processing	Status After Processing
1	1	No Offer	Allocated
2	2	Provisional	No Longer Required

Example 2 - A space becomes available at Base 2 for the student:

Base	Preference	Status Before Processing	Status After Processing
1	1	No Offer	No Offer

Base	Preference	Status Before Processing	Status After Processing
2	2	No Offer	Provisional
3	3	Provisional	No Longer Required

If the student has an offer status of **Y** (Allocated) at a lower preference base and a place becomes available at a higher preference base, the student is ignored.

Example 3 - A space for the student becomes available at Base 2, but the student already has an allocated place at Base 3:

Base	Preference	Status Before Processing	Status After Processing
1	1	No Offer	No Offer
2	2	No Offer	No Offer
3	3	Allocated	Allocated

This process of freeing up places has cascade effects. For example, a place freed up for student A means that their current provisional offer can be freed up for student B, and so on. Freeing up places in this way ensures that vacancy numbers are updated to offer the maximum number of places possible before the processing has finished.

5. One sets each home or coordinating LA student's highest ranked provisional preference to **Y** (Allocated). All subsequent preferences are set to **Q** (No Longer Required).
6. One determines the highest ranked allocated preference for each student and sets any remaining lower preferences to **Q** (No Longer Required).

If the sub group has been set as **Maintain Waiting List** (on the **Sub Groups | Details** tab) any preferences ranked higher than the Allocated preference are recorded as **W** (Waiting List) It is assumed that, since an applicant puts their preferences in choice order, the lower ranked preferences would not be wanted.

**NOTE:** The **Application Status** is not updated by the *Resolve Offers* routine, because some processed applications may have a status of **Waiting for Information from Other Admission Authority**. It would not be appropriate to update the status of these applications.

### Imported Offers

The first time it is run, *Resolve Offers* only makes offers for the home Local Authority. This is because ALT files won't yet have been exchanged with other coordinating LAs.

The Import / *Resolve Offers* / Export routines are re-run until the import files are empty and the export files no longer contain any changed records. Once this steady state has been achieved the Final Allocations process can be run. For more information on Final Allocations, see [Explanation of the Final Allocations Routine](#) on page 183.

## Resolve Offers Worked Example

Student John Smith has the following preferences:

- 1st - Abbot Secondary School
- 2nd - Bishop's School
- 3rd - Canon Secondary School.

After the Make Offers routine was run John had the following allocation statuses:

- 1st - Abbot Secondary School – **No Offer**
- 2nd - Bishop's School – **No Offer**
- 3rd - Canon Secondary School – **Offered**.

The Resolve Offers routine is run three times, as detailed in Step 4 of [Explanation of the Resolve Offers Routine \(Phased\)](#) on page 170.

- 1st run through – no new places become available.
- 2nd run through – a place becomes available at Bishop's School.
- 3rd run through – a place becomes available at Abbot Secondary School.

Running Resolve Offers results in the following changes to the offer status for John:

Preference	After Make Offers	After 1 <sup>st</sup> Resolve Offers	After 2 <sup>nd</sup> Resolve Offers	After 3 <sup>rd</sup> Resolve Offers
1 - Abbott Secondary School	No Offer	No Offer	No Offer	Allocated
2 - Bishop's School	No Offer	No Offer	Provisional	No Longer Required
3 - Canon Secondary School	Offer	Provisional	No Longer Required	No Longer Required

By the end of the Resolve Offers process John now has an allocation to his first preference, whereas immediately after the Make Offers process he only had an offer at his third.

## The Resolve Offers Routine for Ability, Aptitude or Discrete Banded Receivers

When you run the Resolve Offers routine for a receiver using either ability, aptitude or discrete banding, One takes the following actions:

1. One stores the PAN information of all home Local Authority receiver bases in the transfer group.
2. One sets preferences that meet either of the following criteria to **Q** (No Longer Required):
  - Any preferences that are of a lower rank than the first offered place for that student.
  - Any system generated preferences with a preference number greater than the **Process Start Number** (along with any associated band preferences).

There are some exceptions to this process:

- One does not update preferences whose existing offer status is either **R** (Refused by LA) or **X** (Refused by Parent).
- One does not update preferences for any LAs that are not coordinating LAs associated with the transfer group.

For example, coordinating LAs are not used in Wales. In this circumstance, different LAs may each make an offer, so these offer statuses are preserved.

- If the highest offered preference is for a receiver in a subgroup that is marked as Do not include in offer processing, then any lower preferences are only updated to **Q** (No Longer Required) as long as they are not also part of a subgroup marked as Do not include in offer processing.
3. One converts all offered places for the students to either **P** (Provisional), **Y** (Allocated) or **Q** (No Longer Required). Students that are associated with more than one band for a preference are offered a place in a higher band, with the band offer status of lower band preferences set to **Q** (No Longer Required).

The routine used at this point differs depending whether the student's first preference is offered:

- If a banded school first preference is offered, then the status of the band preference changes from **O** (Offer) to **Y** (Allocated). Any lower preferences are changed to **Q** (No Longer Required).

Preference Number	Original Offer Status	New Offer Status
1	Offered	Allocated
2	Offered	No Longer Required

- If the first offer is not the student's first preference, then the highest offered preference is set to **P** (Provisional). Any lower preferences are set to **Q** (No Longer Required).

Preference Number	Original Offer Status	New Offer Status
1	Not Offered	Not Offered
2	Offered	Provisional
3	Offered	No Longer Required

4. One updates the in-band and total **Offer, Allocation/Acceptance** and **Provisional Allocation** counts for all home LA receivers.
5. One checks the PAN to see if the current base has been filled with students who have an offer status of **O** (Offer).
- If the PAN has been reached then One begins to resolve provisional offers (detailed in step 6).
  - If the PAN has not yet been reached, or if the PAN was reached but places have been freed up by the Resolve Offers routine, then One allocates free places at banded receivers to students who currently have an offer status of **N** (No Offer) or **W** (Waiting List) for a particular band. Places are allocated to the students that are next in the band's ranked list.

For example, suppose that a student has an allocated or accepted place at one of their lower ranked preferences and has a **N** (No Offer) or **W** (Waiting List) band preference for a higher ranked preference band(s). If a space in a higher ranked preference band is freed up by Resolve Offers, the student is given a place at the higher preference. This preference is changed to **Y** (Allocated) if it is the student's first preference, and **P** (Provisional) if it is not.

This process applies to both on-time and late applications and still runs if there is another (lower ranked) preference with a main offer status of **Y** (Allocated) or **A** (Accepted) for the student.

This process of freeing up places has a cascade effect. For example, a place freed up for student A means that their current provisional offer can be freed up for student B, and so on.

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One processes the receivers three times, ensuring that the base and band PANs are updated to offer the maximum number of places possible before the processing has finished.

6. One sets each home or coordinating LA student's highest ranked provisional preference to **Y** (Allocated). All subsequent preferences are set to **Q** (No Longer Required).
7. One resolves multiple band associations. If a student is associated with two bands within a preference and the offer status for the higher priority band is updated to **Y** (Allocated) or **P** (Provisional), then the offer status for the lower priority band is updated to **Q** (No Longer Required) (unless the existing band offer status is **R** (Refused by Local Authority) or **X** (Refused by Parent)).

If the offer status for the lower priority band is updated to **Y** (Allocated) or **P** (Provisional) then the offer status for the higher priority band is not updated.

8. One updates the main offer status for the preference to the most positive of the associated band preferences, using the hierarchy:
  - **A** (Accepted)
  - **Y** (Allocated)
  - **P** (Provisional)
  - **O** (Offer)
  - **W** (Waiting List)
  - **N** (No Current Offer)
  - null
  - **X** (Refused by Parent)
  - **Q** (No Longer Required)
  - **R** (Refused by LA).

One does not allocate places to unranked students within the band, even if there are remaining places once all ranked students have an allocation.

## The Resolve Offers Routine for Fair Banded Receivers

When you run the Resolve Offers routine for a receiver using fair banding only, One takes the following actions:

1. One stores the PAN information of all home Local Authority receiver bases in the transfer group.
2. One sets preferences that meet either of the following criteria to **Q** (No Longer Required):
  - Any preferences that are of a lower rank than the first offered place for that student.
  - Any system generated preferences with a preference number greater than the **Process Start Number** (along with any associated band preferences).

There are some exceptions to this process:

- One does not update preferences whose existing offer status is either **R** (Refused by LA) or **X** (Refused by Parent).
- One does not update preferences for any LAs that are not coordinating LAs associated with the transfer group.

For example, coordinating LAs are not used in Wales. In this circumstance, different LAs may each make an offer, so these offer statuses are preserved.

- If the highest offered preference is for a receiver in a subgroup that is marked as **Do not include in offer processing**, then any lower preferences are only updated to **Q** (No Longer Required).

Required) as long as they are not also part of a subgroup marked as **Do not include in offer processing**.

3. One converts all offered places for the students to **P** (Provisional), **Y** (Allocated) or **Q** (No Longer Required). Students that are associated with more than one band for a preference are offered a place in a higher band, with the band offer status of lower band preferences set to **Q** (No Longer Required).

The routine used at this point differs depending whether the student's first preference is offered:

- If a banded school first preference is offered, then the status of the band preference changes from **O** (Offer) to **Y** (Allocated). Any lower preferences are changed to **Q** (No Longer Required).

Preference Number	Original Offer Status	New Offer Status
1	Offered	Allocated
2	Offered	No Longer Required

- If the first offer is not the student's first preference, then the highest offered preference is set to **P** (Provisional). Any lower preferences are set to **Q** (No Longer Required).

Preference Number	Original Offer Status	New Offer Status
1	Not Offered	Not Offered
2	Offered	Provisional
3	Offered	No Longer Required

4. One updates the in-band and total Offer, Allocation/Acceptance and Provisional Allocation counts for all home LA receivers.
5. One checks the PAN to see if the current base has been filled with students who have an offer status of **O** (Offer).
  - If the PAN has been reached, then One begins to resolve provisional offers (detailed in step 6).
  - If the PAN has not yet been reached, or if the PAN was reached but places have been freed up by the Resolve Offers routine, then One allocates free places at banded receivers to students who currently have an offer status of **N** (No Offer) or **W** (Waiting List) for a particular band. Places are allocated to the students that are next in the band's ranked list.

This process of freeing up places has a cascade effect. For example, a place freed up for student A means that their current provisional offer can be freed up for student B, and so on. One processes the receivers three times, ensuring that the base and band PANs are updated to offer the maximum number of places possible before the processing has finished.

One allocates places differently depending on whether the receiver is an OAA receiver or not.



### For OAA Receivers

One processes any preferences whose band offer status is either **N** (No Offer) or **W** (Waiting List) in band rank order.

For example, suppose that a student has an allocated or accepted place at one of their lower ranked preferences and has a **N** (No Offer) or **W** (Waiting List) band preference for a higher ranked preference band(s). If a space in a higher ranked preference band is freed up by Resolve Offers, the student is given a place at the higher preference. This preference is changed to **Y** (Allocated) if it is the student's first preference, and **P** (Provisional) if it is not.

This process applies to both on-time and late applications and still runs if there is another (lower ranked) preference with a main offer status of **Y** (Allocated) or **A** (Accepted) for the student.

### For Non-OAA Receivers

One processes the highest-priority band (i.e. band 1) first. Offers are then resolved for the next-highest priority band, and so on.

Within a band, One first tries to fill available places from ranked preferences (regardless of whether they are late or system-generated preferences) within that band, where the band Offer Status is either **N** (No Offer) or **W** (Waiting List).

- One processes these No Offer or Waiting List preferences in order of the existing band rank (highest first - e.g. 1, 2, 3 and so on, where 1 is the highest).
- One does not re-sort the list by oversubscription criteria and recalculate a rank. Instead, One uses the existing rank for home non-OAA schools which have been set by the Make Offers routine (for all home non-OAA receivers), and the Re-rank Waiting List process for individual receivers (if changes need to be made to the ranks after the Make Offers process has been run, for example).
- One does not allocate/provisionally allocate places to unranked students.

If the available places can't be filled from students within the current band (because there are not enough ranked preferences with a band offer status of **N** (No Offer) or **W** (Waiting List)), then One fills the remaining places by pulling students with ranked preferences whose offer status is either **N** (No Offer) or **W** (Waiting List) from that receiver's other bands.

**NOTE:** For a detailed explanation of how Fair banding works to pull students in from other bands in a non-OAA receiver, see [Resolve Offers Example for Fair Banding Non OAA Receivers](#) on page 181.

6. One sets each home or coordinating LA student's highest ranked provisional preference to **Y** (Allocated). All subsequent preferences are set to **Q** (No Longer Required)..
7. One updates the main offer status for the preference to the most positive of the associated band preferences, using the hierarchy:
  - **A** (Accepted)
  - **Y** (Allocated)
  - **P** (Provisional)
  - **O** (Offer)
  - **W** (Waiting List)
  - **N** (No Current Offer)
  - Null
  - **X** (Refused by Parent)
  - **Q** (No Longer Required)

- R (Refused by LA).

One does not allocate places to unranked students within the band, even if there are remaining places once all ranked students have an allocation.

## Resolve Offers Example for Fair Banding Non OAA Receivers

Where there is a place available in a band that can't be filled within that band, One looks to see if there are any ranked students with a current offer status of **N** (No Offer) or **W** (Waiting List) in any band of higher priority than the current band. Any such students are pulled in from the higher bands.

### Example

A receiver has five bands.

A place in band 3 has been freed up by the Resolve Offers process. One looks to fill this place with a student from band 2.

When pulling a student from the higher priority band (band 2), One looks to see if there is at least one ranked student waiting (i.e. a student with status **N** (No Offer) or **W** (Waiting List) in the higher band).

One pulls the student who has the lowest test score of all the students who are currently in band 2 and have an offer status of **Y** (Allocated), **A** (Accepted), **P** (Provisional), **O** (Offered), **N** (No Offer) or **W** (Waiting List). This student is then assigned rank one in their new band (band 3), and is given a status of **Y** (Allocated) if this is their first preference or **P** (Provisionally Allocated) if not.

If there is no ranked student (i.e. a student with a status of **N** (No Offer) or **W** (Waiting List)) waiting in band 2, then One checks for ranked students who are waiting in the next band up (band 1).

If such students are found, One looks that the students in band 1 whose offer status is either **Y**, **A**, **P**, **O**, **N** or **W**, and pulls the student from that group with the lowest test score into band 2. One then pulls the band 2 student with the lowest test score (where the offer status is one of **Y**, **A**, **P**, **O**, **N** or **W**) into band 3.

For bands 2 and 3, One assigns a rank of 1 to the pulled preference and increments the existing ranks by one, ensuring that the students are allocated/provisionally allocated as appropriate. Students are only pulled into adjacent bands.

If there are no ranked waiting (**N**, **W**) students within any higher priority bands than the band with the place available, then One checks whether there any ranked waiting (**N**, **W**) students in the next lowest priority band. In this example, One checks band 4.

If there are any ranked waiting students in the lower band, then One pulls the student with the highest test score (where the offer status is one of **Y**, **A**, **P**, **O**, **N** or **W**) into band 3. One assigns a rank of one more than the lowest ranked preference already in the band to the pulled preference, (e.g. if the lowest ranked preference was rank 9, then the pulled preference would be assigned rank 10) and allocates/provisionally allocates the place available as appropriate.

If there are no ranked waiting (**N**, **W**) students within band 4, One checks whether there are any such students in band 5. If so, then One pulls the student with the highest test score in band 5 (where the offer status is one of **Y**, **A**, **P**, **O**, **N** or **W**) into band 4.

One then pulls the student with the highest test score in band 4 (where the offer status is one of **Y**, **A**, **P**, **O**, **N** or **W**) into band 3 to fill the place available. One assigns a new rank of one more than the existing lowest rank within the band to the pulled preferences and ensures that the students are allocated/provisionally allocated as appropriate in both bands.

If there are no ranked waiting (**N**, **W**) students at all, then the place is left unfilled.

## Resolve Offers and Banding Combinations

The Resolve Offers routine works differently if the receiver is using a combination of banding methods, as opposed to a single banding method. For more information on how Resolve Offers operates when using single banding methods, see [The Resolve Offers Routine for Ability, Aptitude or Discrete Banded Receivers](#) on page 176 for ability, aptitude and discrete banding and [The Resolve Offers Routine for Fair Banded Receivers](#) on page 178 for fair banding.

### Ability and Discrete Banding

The Resolve Offers routine processes the bands with the highest priority first. If this results in a band having vacancies, then the highest ranked children in the band with **N** (No Offer) status are allocated/provisionally allocated.

Vacancies in a discrete band within the assessed band are filled from that band's waiting list only.

Children who have applied for the assessed band and who have stated that they should not be considered for the mainstream school are not considered for vacancies in the non-assessed band.

### Aptitude and Discrete Banding

The Resolve Offers routine processes the bands with the highest priority first. If this processing generates vacancies within the band, then the highest ranked children in that band with statuses of **N** (No Offer) are allocated/provisionally allocated.

Vacancies in a discrete band within the aptitude band are filled from that band's waiting list only.

Children who have applied for the aptitude band and who have stated that they should not be considered for the mainstream school are not considered for vacancies in the non-aptitude band.

### Aptitude and Fair Banding

Schools using combined aptitude and fair banding can run the Resolve Offers routine in two ways:

- **Make offers for the aptitude band and then make offers to the non-aptitude band based on fair banding.**

Offers are resolved for the aptitude bands first. Any vacancies that are generated in an aptitude band are filled with the highest ranked children in that band who have a status of **N** (No Offer).

The fair band offers are resolved once offers have been resolved for the aptitude bands. Any vacancies that are generated in a fair band are filled as described in Step 5 of [The Resolve Offers Routine for Fair Banded Receivers](#) on page 178.

If a vacancy is generated in the lowest priority fair band and there is no waiting list, then the vacancy is filled with the child from the next higher band who has the lowest test score.

- **Use fair banding within both the aptitude and the non-aptitude band.**

Offers are resolved for the aptitude bands first. Children from the individual fair bands within the aptitude band are allocated at this point. Any vacancies that are generated in the fair bands are filled as described in Step 5 of [The Resolve Offers Routine for Fair Banded Receivers](#) on page 178.

The non-aptitude fair bands are resolved in the same way as the aptitude fair bands once offers have been resolved for all aptitude bands.

## Running the Final Allocations Routine

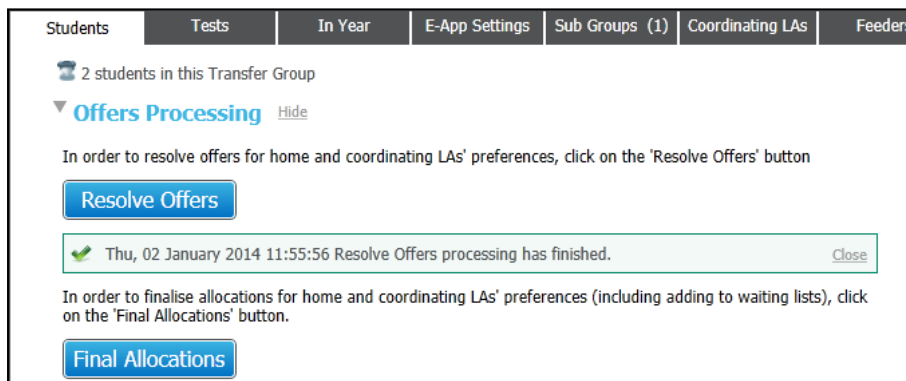
The Final Allocations routine deals with any remaining provisional offers and checks that each Home Local Authority student has at least one preference with a status of **Y** (Allocated). Any students who cannot be allocated are assigned to the No Offer base with a status of **O** (Offer). These students must then be placed manually.

For English and Welsh LAs, both Make Offers and Resolve Offers must be run before the Final Allocations routine can be run. However, regions in Northern Ireland can run Final Allocations without running Make Offers or Resolve Offers first. This enables One to support the admissions process used in Northern Ireland, whereby a user may wish to use Final Allocations to update the status of 'finalised' places from Provisional to Allocated before Offer Day.

As with other LAs, regions in Northern Ireland can only run the Final Allocations routine once.

To run the Final Allocations routine:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Offers Processing** section.



3. Click the **Final Allocations** button to run the routine.

## Explanation of the Final Allocations Routine

The Final Allocations routine skips applications that meet any of the following criteria:

- Records that have a status of R (Refused by Local Authority) or X (Refused by Parent).
- In year applications that have an application status linked to an external code of CLOS (Closed/completed).
- Applications that have a Place Required date that is after the offer date of the selected process period.
- In year applications received after the process period's application closing date:
  - If an Application Received date has been entered, then only applications with a date that is on or before the selected process period's application closing date and time are included.
  - If an Application Received date has not been entered, then only applications where the application entered date/time is on or before the process period's application closing date/time are included.

1. One checks each student to see if they have a single provisional allocation or multiple provisional allocations. If a single provisional allocation is recorded, One changes that allocation's offer status from P (Provisional) to Y (Allocated)

## Making Offers

2. One checks home and coordinating LA receiver bases to see which provisional offer has the highest ranking parental preference.
  - If the provisional offer has the highest ranking parental preference then One changes the offer's status to Y (Allocated).
  - If the provisional offer does not have the highest ranking parental preference, One does the following:
    - If a waiting list is being maintained, One changes N (No Offer) to W (Waiting List) for any higher home Local Authority preferences.
    - If a waiting list is not being maintained, One changes P (Provisional) to Q (No Longer Required) for any lower home or coordinating LA preferences. Changing the preference to Q frees the place up for another student.
3. One checks for Home LA students who do not have at least one preference with the status Y (Allocated). If any such students are found, One allocates the students to the No Offer base with a status of O (Offer). The local authority must then place each student manually.
4. For In Year applications only, One updates the application status (which is only stored for In Year applications) to the external code OFFW (Offered and waiting for applicant response), for all students who have been processed and who have been allocated a place.

If a student does not have an allocation to any base then their application status is not updated. The below example outlines how this process works:

### Student 1

Preference	Allocation after Resolve Offers	Allocation after Final Allocation	Application Status
1	Offered	Allocated	OFFW
2	No Longer Required	No Longer Required	
3	No Longer Required	No Longer Required	

### Student 2

Preference	Allocation after Resolve Offers	Allocation after Final Allocation	Application Status
1	Null (from OAA)	Null	OFFW
2	Provisional	Allocated	
3	No Longer Required	No Longer Required	

### Student 3

Preference	Allocation after Resolve Offers	Allocation after Final Allocation	Application Status
1	Null (OAA)	Null	No change
2	No Offer	No Offer	
3	No Offer	No Offer	

## Running the Allocate Alternative Places Process

After collecting and validating applications for school places, LAs run offer routines and exchange files with other LAs in order to try to allocate each child in the transfer group to the highest possible preference school. For each receiver school, children are ranked in a list based on the receiver's oversubscription criteria and places are allocated to available spaces. Since some schools are oversubscribed, it is not always possible to allocate a school place to one of the preference schools expressed by applicants.

It is the statutory duty of an LA's admissions team to allocate a school place for any child residing in their LA where an on-time application has been made. Therefore, if it is not possible to allocate a school place which matches one of the applicant's preferences, then the LA must find an alternative school place. The **Allocate Alternative Places** page provides LAs with tools to help with this process.

### Permissions and Prerequisites

For English and Welsh LAs, the **Allocate Alternative Places** area is only available for normal-phased transfer groups, and can only be accessed once the Resolve Offers routine has been run. However, regions in Northern Ireland can run Allocate Alternative Places without running Resolve Offers first. This enables users to use Allocate Alternative Places to create allocated preferences quickly at a late stage in the admissions round.

As with other LAs, regions in Northern Ireland can run the Allocate Alternative Places routine multiple times.

Only users belonging to user groups with either read or read-write access to the **Allocate Alternative Places** business process can access the **Allocate Alternative Places** area. This business process can be found under the **Admissions Offers and Ranks** main business process.

Permissions are managed in the v4 Client via **Tools | Permissions | User Group Processes**. For more information on managing permissions, see the *Managing Permissions* chapter of the *System Managing Users, Groups & Permissions* handbook.

### The Allocate Alternative Places Tools

The Allocating Alternative Places tools are designed to be flexible. For example, you might choose to use the School for Allocation and Check Receiver Balances tools multiple times so that you can see how current receiver balances would be affected in multiple allocation scenarios. However, the base process to allocate alternative places is as follows:

1. Open the **Allocate Alternative Places** page to display a list of students who meet the unallocated student criteria. For more information on this page and the selection criteria, see [Accessing the Allocate Alternative Places Page](#) on page 186.
2. Use the **Retrieve Home Receivers with Places Remaining** dialog to identify schools with spaces. For more information on this tool, see [Identifying Schools with Spaces](#) on page 189.
3. Use the Calculate distances tool to calculate distances from each student's address to a selected group of receivers. For more information on this process, see [Calculating Distances When Allocating Alternative Places](#) on page 190.
4. Select a school for allocation for each student that you wish to allocate a place to. You can do so either by selecting schools manually, or by using the **Copy Nearest School to School for Allocation** function. For more information on selecting a school for allocation, see [Selecting Schools for Allocation when Allocating Alternative Places](#) on page 193.
5. If required, use the Check Receiver Balances tool to check whether any of the schools for allocation would be over-allocated if these allocations were to be converted into real allocations. For more information on Check Receiver Balances, see [Checking Receiver Balances when Allocating Alternative Places](#) on page 195.

6. If required, click the **Export** hyperlink to export the list of students as a .csv file.
7. Use the Convert 'School for Allocation' into real allocations tool to convert the temporary allocations selected in the school for allocation column into real allocations. For more information on generating real allocations, see [Converting Schools for Allocation into Real Allocations](#) on page 196.

## Accessing the Allocate Alternative Places Page

The **Allocate Alternative Places** page provides information to help with the process of assessing a suitable alternative school place. The page displays a list of students who meet all of the following criteria:

- Student is associated with the selected transfer group.
- Student's application has not been withdrawn from the procedure.
- Student's Home LA matches the dataset's Home LA as identified in DEF\_PARAM.
- Student is active.
- There is no active preference associated with the student's application that has an offer status of either **Allocated** (Y), **Accepted** (A), **Offered** (O) or **Provisionally Allocated** (P) and is for a receiver other than the transfer group's No Offer or No Application bases.

**NOTE:** The list of students generated by the **Allocate Alternative Places** page is different to the list of students with preferences for the No Application and No Offer bases that is generated by the Make Offers and Resolve Offers routines. This is because late applications may have been added to the transfer group after the offer routines were run.

Once the list of students matching the criteria has initially been identified, it is not refreshed automatically. If a new late application is added to the transfer group, then the student is not added to the list automatically. Instead, LAs have control over when the list is refreshed (via the **Refresh** button) so that they can manage alternative allocations in priority order. The list can be refreshed at any time.

Data listed on the **Allocate Alternative Places** page is stored separately from the live applications area, enabling LAs to try out different allocation combinations before creating 'real' allocations.

To display the **Allocate Alternative Places** page:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Offers Processing** section.

Students Tests In Year E-App Settings Sub Groups (1) Coordinating LAs Feeders

2 students in this Transfer Group

**Offers Processing** [Hide](#)

In order to resolve offers for home and coordinating LAs' preferences, click on the 'Resolve Offers' button

[Resolve Offers](#)

Thu, 02 January 2014 11:55:56 Resolve Offers processing has finished. [Close](#)

In order to finalise allocations for home and coordinating LAs' preferences (including adding to waiting lists), click on the 'Final Allocations' button.

[Final Allocations](#)

If there are still unallocated Home LA students remaining, click on the 'Allocate Alternative Places' button to launch an area to review and manage this list.

[Allocate Alternative Places](#)

3. Click the **Allocate Alternative Places** button to display the **Allocate Alternative Places** page.

**Allocate Alternative Places** - SP2 2015 School Preference Data P TG [Back to Transfer Groups](#)

[Retrieve Home Receivers with places remaining](#) [Check Receiver Balances](#) [Convert 'School for Allocation' into real allocations](#)

Total number of unallocated home students : 9

Find Student: Surname or Surname & Forename Find Student: StudentID Clear Selection

Select school for allocation from : Home Receivers with spaces

Filter by

On-Time/Late/No application School for Allocation Name / No Nearest School Name / No [Search](#) [Clear Filters](#)

Name	ID	Gender	School for Allocation	On-Time	Postcode	Nearest School	NS Dist.	Next Nearest School	NNS Dist.
<a href="#">Preference 44, Student 44 S44</a> Dob: 10/03/2011		Female	<input type="text" value="Receiver, LA or School No."/>	<input type="checkbox"/>					
<a href="#">Preference6, Student'6 Middle-6</a> Dob: 01/12/2010		Female	<input type="text" value="Receiver, LA or School No."/>	<input checked="" type="checkbox"/>	MK45				

The list was last generated at: 16/05/2019 14:36:55 [Refresh](#) [Cancel](#) [Save](#)

[Calculate distances](#) [Copy Nearest school to 'School for Allocation'](#)

If the list of unallocated students has not yet been identified, a confirmation dialog is displayed. If this dialog is displayed, click the **Continue** button to display the **Allocate Alternative Places** page.

The table of students in the **Allocate Alternative Places** page can be filtered using the fields at the top of the table. You can also sort the columns by clicking on the column headers. To sort the list by multiple data items, shift-click on the appropriate column headers.

The filter and sort functions can be combined, so that you could filter a list by nearest school, for example, and then sort the resulting list of students based on whether their applications were on time or not. You can also export the filtered and sorted list as a .csv file by clicking the **Export** hyperlink. Exported lists contain three additional data items: **SEN Status**, **Address Easting** and **Address Northing**.

The table contains the following information:

- Name
- ID
- Gender



- **School for Allocation:** The school that the student is to be allocated to. Note that the student is not allocated to the school until the Convert 'School for Allocation' into real allocations routine is run. This feature enables you to experiment with different allocation combinations for your unallocated students.

For more information on selecting schools for allocation, see [Selecting Schools for Allocation when Allocating Alternative Places](#) on page 193.

For more information on running the Convert 'School for Allocation' into real allocations routine, see [Converting Schools for Allocation into Real Allocations](#) on page 196.

- **On-Time:** Displays a tick if the student's application was received on-time, a cross if the application was received late, or a dash if there are no active parental preferences for the application (i.e. there are no preferences with a preference number that is less than the **Transfer Group System-Generated Number**).

The business rules for the On-time flag depend on the setting of the **Late Application** rule:

- If the rule is set to **Consider application late if ALL active preferences are late:**
  - The flag displays as late if all of the active parental preferences for the application have the **Late** flag selected.
  - Otherwise, if there any active parental preferences, then the flag displays as on time.
- If the rule is set to **Consider application late if ANY active preferences are late:**
  - The flag displays as late if any of the active parental preferences for the application have the Late flag selected.
  - Otherwise, if there any active parental preferences, then the flag displays as on time.

For more information on setting the Late Application rule, see [Oversubscription Criteria](#) on page 92.

## ■ Postcode

- **Nearest School:** The name of the nearest school to the student. This information is only displayed once the Calculate Distances routine has been run. For more information on running the Calculate Distances routine, see [Calculating Distances When Allocating Alternative Places](#) on page 190.
- **NS Dist:** The distance to the student's nearest school. This information is only displayed once the Calculate Distances routine has been run. For more information on running Calculate Distances, see [Calculating Distances When Allocating Alternative Places](#) on page 190.
- **Next Nearest School:** The name of the second nearest school to the student. This information is only displayed once the Calculate Distances routine has been run. For more information on running the Calculate Distances routine, see [Calculating Distances When Allocating Alternative Places](#) on page 190.
- **NNS Dist:** The distance to the student's second nearest school. This information is only displayed once the Calculate Distances routine has been run. For more information on running the Calculate Distances routine, see [Calculating Distances When Allocating Alternative Places](#) on page 190.
- **Address:** If the selected transfer group's **Use Admissions Address** setting is selected, then this field displays the student's admissions address. Otherwise, it displays the student's correspondence address.
- **Pref 1 School:** The name and school number of the student's first parental preference.

- **P1 Religion:** The school religion of the student's first parental preference. This column is only displayed if the preference has an **Applicant Reason** of **Religion**.
- **P1 Gender:** The school gender of the student's first parental preference. This column is only displayed if the preference has an **Applicant Reason** of **School Gender**.
- **P1 Tch Medium:** The teaching medium of the student's first parental preference (if expressed).

## Identifying Schools with Spaces

1. Open the **Process | Transfer Groups | Students | Allocate Alternative Places** page.
2. Click the **Retrieve Home Receivers with Spaces Remaining** hyperlink. A dialog listing bases that meet all of the following criteria is displayed:
  - The LA number matches One's Home LA setting.
  - The base has a PAN (Published Admission Number) recorded for the year that matches the **Transfer Group Year** and the NCY that matches the **Transfer Group NCY**.
  - When the PAN for the **Transfer Group Year** and **NCY** is compared to the number of allocations (i.e. preferences in the CHOICES table with an offer status of **Offered**, **Provisional Allocation**, **Allocated** or **Accepted**) for that receiver within the transfer group, there are places remaining.

Base Name	PAN	Actual Spaces	AP Allocation	Balance	OAA	Control	Gender	Selective	Teaching Medium
Pinchmill School (p4mt) School No: 2041 Type: Primary	100	98	0	98			Co-Ed		
Pottton Lower School (p4r) School No: 8001 Type: Primary	110	108	0	108			Co-Ed		

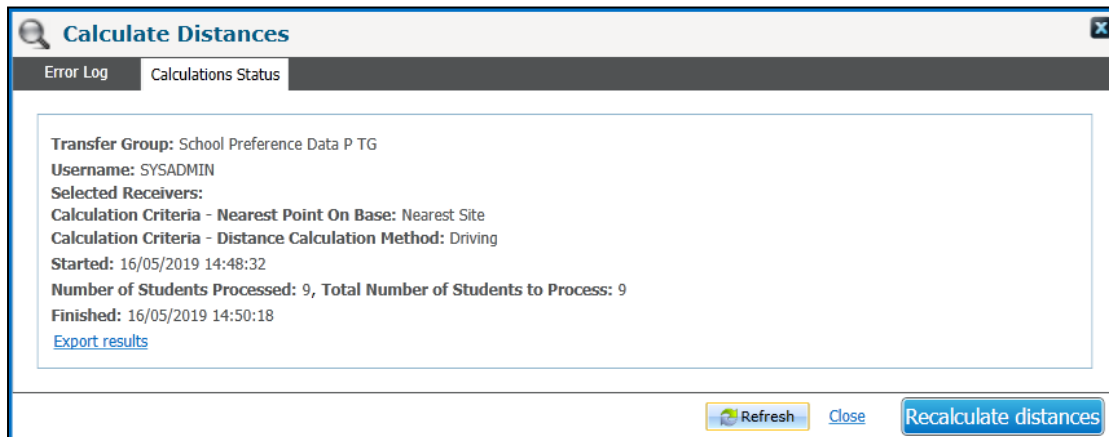
As well as basic details about each receiver, this dialog displays the following information on place numbers:

- **PAN** - for the transfer group year and the transfer group's **Intake NCY**.
- **Actual Spaces** - The current number of free spaces at the base in the live applications area (i.e. the balance value taken from the **Bases | Receivers** area).
- **AP Allocation** - The number of home LA unallocated students in the unfiltered **Allocate Alternative Places** list (not including students previously allocated through the process in this transfer group) who have this school selected as their **School for Allocation**.
- **Balance** - This field acts differently depending on whether the PAN is known:
  - If the PAN is known, then the **Balance** field displays **Actual Spaces** minus **AP Allocation** - this may be a positive or negative number.
  - If the PAN is not known, then the **Balance** field is the negative of the **AP Allocation** field. For example, if the AP Allocation was 5, then the Balance would be -5.

## Calculating Distances When Allocating Alternative Places

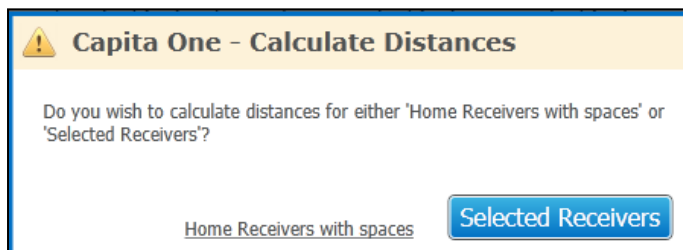
The Calculate Distances tool enables you to calculate the distances from each unallocated student's address to a group of receivers. You can either calculate distances to all home LA receivers, or to a selected receiver group.

1. Open the **Process | Transfer Groups | Students | Allocate Alternative Places** page.
2. Click the **Calculate Distances** hyperlink to display the **Calculate Distances** dialog.



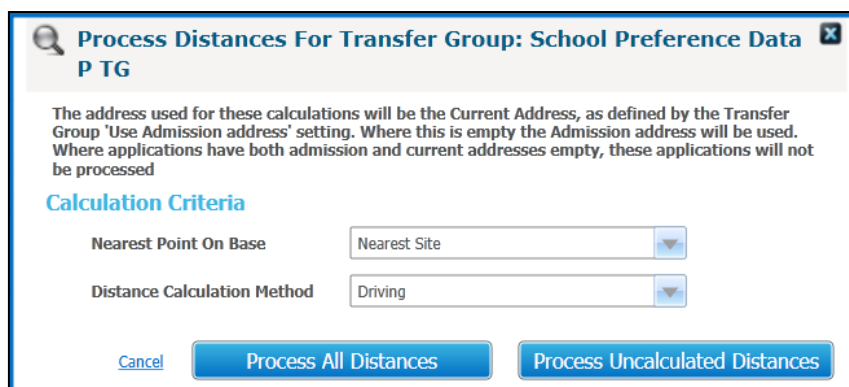
3. If you have calculated distances for this transfer group before, click the **Recalculate Distances** button. The **Capita One - Calculate Distances** dialog is displayed, asking whether you want to calculate distances to a selected group of receivers, or to all home receivers with spaces.

If you have not calculated distances for this transfer group before, then the **Capita One - Calculate Distances** dialog is displayed automatically.

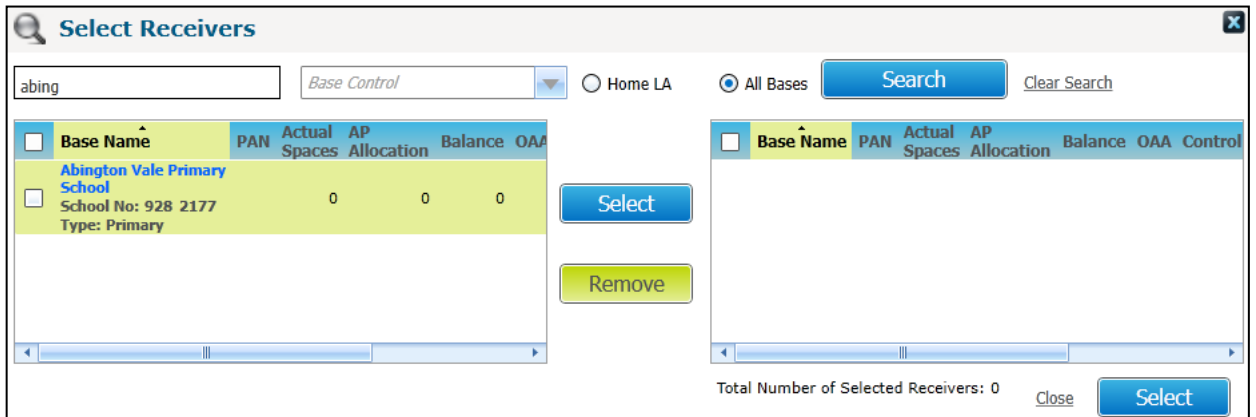


- If you wish to calculate distances to all home receivers with spaces, click the **Home Receivers with spaces** hyperlink to display the **Process Distances For Transfer Group** dialog.

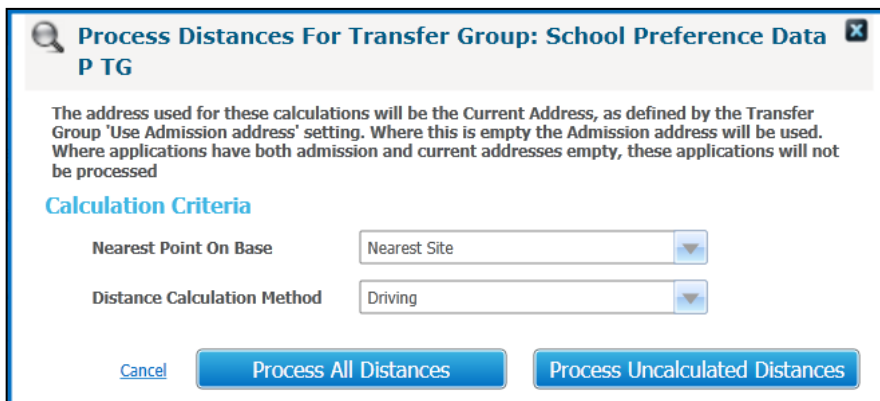
**NOTE:** When considering whether each home receiver has 'spaces', One takes into account both the actual spaces (from the live applications area) and the **Schools for Allocation** entries. One selects any home receivers whose the **Balance** is > 0 (as displayed on the **Check Receiver Places** page).



- If you wish to calculate distances to a specific group of receivers:
  - i. Click the **Selected Receivers** button to display the **Select Receivers** dialog.



- ii. Optionally, use the search fields to filter the list of bases in the left-hand column.
- iii. Select the check box for each of the bases that you wish to measure distance to. To select all bases, select the topmost check box.
- iv. Click the **Select** button in between the two lists to move the selected bases to the right-hand list.
- v. Click the **Select** button at the bottom of the dialog to confirm your selections and close the dialog. The **Process Distances For Transfer Group** dialog is displayed.



4. Select the point on the base that you wish to measure to. The available options are:
  - **Nearest Site:** One ignores any geocoded gates.
  - **Nearest Gate:** One ignores any geocoded sites.
  - **Nearest Gate or Site:** If both are geocoded One uses whichever is nearest to the student's address.
  - **Nearest Gate, if no Gate then Nearest Site:** One looks for a geocoded gate first. If both gate and site are geocoded then One uses the gate in preference.
5. If the site / transfer group is using GIS, then select a **Distance Calculation Method** from the drop-down menu. The available options are:
  - **Driving**
  - **Walking:** There must be a safe walking route network map for the Local Authority area within the GIS utility in order to use Safe Walking Distance.
  - **Direct:** Calculates a straight line distance between the student's address and the base, using curved earth.

**NOTE:** If the site / transfer group is not using GIS, then only the *Direct* option is available. Distances are calculated using Pythagoras' theorem rather than curved earth for non-GIS sites.

6. Select the distances that you wish to process:

- Click the **Process All Distances** button to process all distances to the selected receivers.

**NOTE:** The **Process Uncalculated Distances** button is only displayed once the *Calculate Distances* routine has already been run at least once. Only the **Process All Distances** button is displayed on the first time you run the routine.

- Click the **Process Uncalculated Distances** button to process:

- Those distances to receivers that have not already been calculated.
- Distances for students for whom previously distances were not calculated in this area.

One calculates the selected distances, using the transfer group's **Use Admissions Address** setting to determine whether the student's admissions address or correspondence address is used for the calculations. Depending on the volume of data to calculate, the calculation process may take some time (potentially up to a few hours). The Process Distances dialog displays a running total of processed students.

Once the distance calculations have finished:

- The **Export** hyperlink is displayed, enabling you to export your results in either .CSV, .XLS, XML or .HTM format.
- The **Refresh Nearest Schools Columns** hyperlink is displayed on the **Allocate Alternative Places** page. Click this button to update the **Nearest School**, **NS Dist.**, **Next Nearest School** and **NNS Dist.** fields for the students in the list.

If the transfer group is set up to use GIS, then the **Nearest School**, **NS Dist.**, **Next Nearest School** and **NNS Dist.** fields are clickable links. Click on one of these fields to display the walking and driving routes to the relevant school in a map dialog.

- Any errors are written to the error log, accessible by clicking the **Error Log** tab on the **Calculate Distances** dialog.

## Selecting Schools for Allocation when Allocating Alternative Places

The **Allocate Alternative Places** page enables you to select a school for allocation for a student before you create a "real" allocation for that student. Selecting a school for allocation creates a temporary allocation that only exists within the **Allocate Alternative Places** area, enabling you to see what effect allocating a particular student to a particular school would have on allocation numbers before any concrete changes are made.

There are two methods of selecting schools for allocation in the **Allocate Alternative Places** page. You can either select schools manually, or use the Copy Nearest school to 'School for Allocation' routine to select the nearest schools for a group of students.

### Selecting Schools Manually

1. Open the **Process | Transfer Groups | Students | Allocate Alternative Places** page.

2. Select whether you want to select from **All Receivers** or only **Home Receivers with spaces** using the **Select school for allocation from** menu.

**NOTE:** When considering whether each home receiver has 'spaces', One takes into account both the actual spaces (from the live applications area) and the **Schools for Allocation** entries. One selects any home receivers whose **Balance** is > 0 (as displayed on the **Check Receiver Places** page).

3. Select a school for allocation for the student. You can do this in two ways:
  - Type part of the name or school number directly into the student's **School for Allocation** field and select from the autosuggested matching items.
  - Select a school using the **Select a Receiver** dialog:
    - i. Click on a student's **School for Allocation** browse to display the **Select a Receiver** dialog.

## Making Offers

Base Name	LA	Sch. No.
Pinchmill School (p4mt)	820	2041
Potton Lower School (p4r)	820	8001

- ii. Optionally, enter a **Base Type**, **Base Control**, **Base Name**, **LA No** or **School No** to filter the receiver list.
  - iii. Highlight a receiver and then click the **Select** button to select that receiver as the student's School for Allocation and close the dialog.
4. Click the **Save** button to save your changes.

If you selected a school(s) where the **AP Balance** is less than 0 then One displays a warning dialog stating that the school will exceed PAN if you continue with the allocation. However, the data is still saved.

**NOTE:** To delete a school for allocation from the **Allocate Alternative Places** page, clear the school name from the relevant student's **School for Allocation** field and then click the **Save** button.

## Copying Nearest Schools to the School for Allocation Field

1. Open the **Process | Transfer Groups | Students | Allocate Alternative Places** page.

Name	ID	Gender	School for Allocation	On-Time	Postcode	Nearest School	NS Dist.	Next Nearest School	NNS Dist.
Preference 44, Student 44 S44 Dob: 10/03/2011		Female	Receiver, LA or School No.						
Preference 6, Student 6 Middle-6 Dob: 01/12/2010		Female	Receiver, LA or School No.	✓	MK45				

2. If required, use the fields at the top of the page to filter the list of unallocated home students.
3. Click the **Copy Nearest school to 'School for Allocation'** hyperlink to begin the allocation process for the students displayed in the list. Any students who already have a school for allocation assigned are not affected.

One may display some confirmation dialogs at this point, depending on the data to be processed.

- If the list is filtered, One displays a confirmation dialog stating that only the students in the filtered list will be updated. Click the **Continue** button to close the dialog and proceed, or the **Cancel** hyperlink to cancel.

- If the routine would allocate a student to a home receiver that does not have any free spaces, One displays a warning dialog. Click the **Continue** button to close the dialog and proceed, or the **Cancel** hyperlink to cancel.

One displays a message once the routine is complete.

## Checking Receiver Balances when Allocating Alternative Places

The **Check Receiver Balances** page displays a list of home LA receivers that have places remaining (according to the live preferences area and not including **Schools to be Allocated** in the AAP area) as well as any other receiver that has been identified as a school for allocation within the transfer group. The list shows the current number of free spaces at the receiver, the number of places temporarily allocated at the receiver as a result of the **Allocating Alternative Places** process and the number of places that would be remaining at the base if the temporary allocations made in the **Allocating Alternative Places** screen were to be converted into real allocations.

1. Open the **Process | Transfer Groups | Students | Allocate Alternative Places** page.

The screenshot shows the 'Allocate Alternative Places' interface. At the top, it displays the page title and navigation links. Below this, there are search filters for 'Find Student: Surname or Surname & Forename' and 'Find Student: StudentID'. A dropdown menu allows selecting 'Home Receivers with spaces'. Further down, there are filters for 'On-Time/Late/No application', 'School for Allocation Name / No', and 'Nearest School Name / No'. A 'Search' button is present. Below the filters is a table with columns: Name, ID, Gender, School for Allocation, On-Time, Postcode, Nearest School, NS Dist., Next Nearest School, and NNS Dist. Two rows are visible in the table. The first row is for 'Preference 44, Student 44 S44' (Female, 10/03/2011) with a search icon and an 'x' in the 'On-Time' column. The second row is for 'Preference6, Student'6 Middle-6' (Female, 01/12/2010) with a search icon and a checkmark in the 'On-Time' column, and 'MK45' in the 'Postcode' column. At the bottom, there is a 'Refresh' button and a timestamp: 'The list was last generated at: 16/05/2019 14:36:55'. There are also 'Calculate distances' and 'Copy Nearest school to 'School for Allocation'' links, and 'Cancel' and 'Save' buttons.

2. Click the **Check Receiver Balances** hyperlink to display the **Check Receiver Balances** page in a separate browser window. This page displays a list of bases that meet either of the following criteria:

- Home receivers that have spaces remaining.
- Bases that have been selected as a school for allocation.

The list displays the following information on allocation numbers:

- **PAN:** The PAN of the base.
- **Actual Spaces:** The current number of free spaces at the base in the live applications area (i.e. the balance value taken from the **Bases | Receivers** area).
- **AP Allocation:** The number of places reserved at the base as a result of the **Allocating Alternative Places** process.
- **Balance:** The number of places that would be remaining at the base if the reserved allocations made in the **Allocating Alternative Places** screen were to be converted into real allocations.



**AP Schools for Allocation Balances - SP2 2015 School Preference Data P TG**  
 Includes Home Receivers with places remaining  
 Total number of Receivers: 16 Total number of Actual Spaces: 2827 Total number of AP Allocations displayed: 0 [Export](#)

Base Name or School No. Base Control AP Schools for Allocation + Home Receivers with spaces Search

Base Name	LA No	PAN	Actual Spaces	AP Allocation	Balance	OAA	Control	Gender	Selective	Teaching Medium
<b>Pinchmill School (p4mt)</b> School No: 2041 Type: Primary	820	100	98	0	98			Co-Ed		
<b>Potton Lower School (p4r)</b> School No: 8001 Type: Primary	820	110	108	0	108			Co-Ed		

- If required, enter a **Base Name or School No.**, **Base Control** or **Base Type** and then click the **Search** button to filter the list.

**NOTE:** To export the list of receivers and balances as a .csv file, click the **Export** hyperlink and select a save location for the file from the Windows **Save As** dialog.

## Converting Schools for Allocation into Real Allocations

The Convert 'School for Allocation' into real allocations function converts the entries in the **School for Allocation** column into 'live' allocations.

Before running this function, you must specify an **Alternative Places Preference Number** for the transfer group. The **Alternative Places Preference Number** is the preference number used when creating system-generated allocated preferences. For example, your LA may have a policy stating that the preference number should be set to 10 where an alternative place has been allocated, so that such preferences can easily be identified. In this example, the **Alternative Places Preference Number** would be set to 10.

This number can be set above or below the value of the **System Generated Preferences Starting No.** (which defaults to 20), but you should ensure that the **Alternative Places Preference Number** is significantly greater than the highest parental preference number, so that you can distinguish these preferences from parental preferences easily. Capita recommends using a value of at least 10.

- Define an **Alternative Places Preference Number**.
  - Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
  - Click the **Edit** hyperlink to display editable fields relating to transfer group details.

Primary to Secondary \* SEC \* 2019 - 01/09/2019 - 31/08/2020 \*

7 \* 6 \* Feeders: 65 Receivers: 34 In Year  Active

Use GIS  Use Admission Address  System Generated Preferences Starting No 20 Hide Applic. Verification  Prevent OAA ranking online

UNC:A+T Dummy / No Form \* UNC:A+T Withdrawn \* Alternative Places Preference Number

UNC:A+T No Offer \* UNC:A+T Import No Current School \* Late Application Rule (for Alternative Places) 'Late' if ALL active preferences are late

Cancel Save

- Enter a number into the **Alternative Places Preference Number** field and then click the **Save** button to save your changes.
- Open the **Process | Transfer Groups | Students | Allocate Alternative Places** page.

**Allocate Alternative Places - SP2 2015 School Preference Data P TG**

Retrieve Home Receivers with places remaining | Check Receiver Balances | Convert 'School for Allocation' into real allocations

Back to Transfer Groups

Total number of unallocated home students : 9

Select school for allocation from : Home Receivers with spaces

Find Student: Surname or Surname & Forename | Find Student: StudentID | Clear Selection

Filter by: On-Time/Late/No application | School for Allocation Name / No | Nearest School Name / No

Name	ID	Gender	School for Allocation	On-Time	Postcode	Nearest School	NS Dist.	Next Nearest School	NNS Dist.
<a href="#">Preference 44, Student 44 S44</a> Dob: 10/03/2011		Female	Receiver, LA or School No.	✖					
<a href="#">Preference6, Student 6 Middle-6</a> Dob: 01/12/2010		Female	Receiver, LA or School No.	✔	MK45				

The list was last generated at: 16/05/2019 14:36:55 | Refresh

Calculate distances | Copy Nearest school to 'School for Allocation' | Cancel | Save

3. If you wish to convert allocations for a subset of the students in the list (as opposed to all students), use the filter controls to select the students whose allocations you wish to convert.
4. Click the **Convert 'School for Allocation' into real allocations** hyperlink. A confirmation dialog is displayed.

**NOTE:** The **Convert 'School for Allocation' into real allocations** hyperlink is only displayed if you have write permission to **Allocate Alternative Places** and if at least one student in the list has a **School for Allocation** populated.

5. Click the **Continue** button to begin the conversion routine. One may display some confirmation dialogs, depending on the data to be processed.
  - If the list is filtered, One displays a confirmation dialog stating that only the students in the filtered list will be updated. Click the **Continue** button to close the dialog and proceed, or the **Cancel** hyperlink to cancel.
  - If the routine would allocate cause any home LA receivers to become 'allocated over PAN', then One displays a dialog listing the affected schools. Click the **Continue** button to close the dialog and proceed, or the **Cancel** hyperlink to cancel.

The routine creates preferences for the schools for allocation with an offer status of **Allocated** for each of the selected students. The preference number is the transfer group's **Alternative Places Preference Number**.

Once the routine has finished, One displays a dialog showing the total allocations successfully created, a list of over-allocated home receivers (if applicable) and a list of students for whom allocations could not be created (if applicable).

Students may not be allocated for various reasons. For example, the student may have recently received an allocation in the live applications area, they may have been withdrawn from the process, or they may have made inactive.

Once finished, the list of students is automatically refreshed to show the remaining unallocated home LA students.

## Publishing Offer Information Online

The Publish Offer Information Online process feeds the offer status information for all automatic offer emails and users of the Admissions & Transfers Online public facing software. The process must be run in order to publish the offer information online.

English and Welsh LAs must run Resolve Offers before Publish Offer Information Online can be run. However, regions in Northern Ireland can run Publish Offer Information Online without running Resolve Offers first. This enables One to support the admissions process used in Northern Ireland, whereby a user may wish to use Publish Offer Information Online to store a snapshot of preferences data on Offer Day, which can be used in management reports even though the live applications & preferences may later change.

As with other LAs, regions in Northern Ireland can only run the Publish Offer Information Online routine once.

**IMPORTANT NOTES:** Publish Offer Information Online is a once-only process that is designed to publish offer information as it stands on the offer date. Any offer status changes made after the offer date cannot be published online.

In order for the offer emails sent via A&T Online to be seeded with appropriate information, LAs must run the Publish Offer Statuses Online process no later than the day before the publicise date. Offer emails cannot be sent if Publish Offer Statuses Online has not been run. Offer information is not displayed in A&T Online prior to the **Publicise** date even once the Publish Offer Statuses Online process has been run.

If you do not run the process in time a warning email is sent to your mailbox, telling you how to remedy the situation. For the text of this email, see [Appendix D – A&T Email Text](#) on page 291

To publish offer information online:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Offers Processing** section.

The screenshot shows the 'Offers Processing' section of the A&T Back Office. At the top, there are navigation tabs: Students, Tests, In Year, E-App Settings, Sub Groups (12), Coordinating LAs, and Feeders. Below the tabs, it indicates '1179 students in this Transfer Group'. The 'Offers Processing' section is expanded, showing instructions for resolving offers and final allocations. There are three main buttons: 'Resolve Offers', 'Final Allocations', and 'Publish Offer Information Online'. A green notification bar indicates that 'Resolve Offers processing has finished' on Thu, 16 May 2019 at 15:35:49.

3. Click the **Publish Offer Information Online** button to run the routine. All active student applications, along with their offer status information for preferences, are exported to the AT\_APPLICATION\_TRANSFER table.

System generated preferences (i.e. those preferences where the preference number is equal to or greater than the **Transfer Group Process Start Number**) are exported if they have an offer status of **O** (Offer), **Y** (Allocated), **A** (Accepted by Parent) or **P** (Provisional).

Applications that are withdrawn or inactive are not exported.

Once the Publish Offer Information Online process has been run, the applicant can view the offer statuses for each of their preferences in Admissions Online.

**NOTES:** The **Publish Offer Information Online** status message refreshes every five seconds. If, after two minutes, the message is still indicating that the routine has not started, check with your System Administrator to verify whether the integration service is still running.

**Publish Offer Information Online** can only be run once for a specific transfer group, because online offer information should always match the offer letter sent to applicants on 1st March. It is not necessary to re-run the routine, even if subsequent offer status changes are made as part of the appeals process.

## Running the Final Transfer Process

The Final Transfer routine updates the registered base for students in the transfer group. This routine should be run immediately prior to the start of the new academic year or at the start of the new academic year, once all allocation, management and appeals processes are finished for the transfer group.

**NOTE:** Northern Ireland regions can run Final Transfer without running any offer routines first. This enables One to support the admissions process used in Northern Ireland, whereby a user may wish to use Final Transfer to create school history records based on allocated schools.

**IMPORTANT NOTE:** Although it is possible to run Final Transfer before the end of the summer term, you should consider the implications of running this routine before the end of the summer term, as the **Registered Base** field may be in use by other modules.

You should not run the Final Transfer routine if your Local Authority is using B2B Students or XML Data Exchange to update your One School History information from SIMS.

To run the Final Transfer routine:

1. Select a transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.
2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Post Offer Processing** section to display the **Final Transfer** fields.

3. Enter an **End Date**, **Leaving Reason**, **Start Date** and **Joining Reason**. These fields are used to populate the new school history records created by the routine.
4. Click the **Process** button. A warning dialog is displayed.
5. Click the **OK** button to run the Final Transfer routine.

## Making Offers

A printable error log is produced as the routine runs. Once the routine has run you can also produce a Crystal report on students successfully allocated.

You can repeat the Final Transfer process as required, until all students are successfully allocated. If a student has not been transferred to a receiver when they should have been. You can add or edit their details, allocate and repeat the Final Transfer routine. Final Transfer is disabled once there are no further records in the error log.

Note that school history records are not overwritten by subsequent re-runs. If you alter the allocated receiver school and repeat Final Transfer, then an additional school history is created with the start date 01/09/yyyy. The record created during the first Final Transfer run now has a **Start Date** of 01/09/yyyy and an **End Date** of 31/08/yyyy.

## Explanation of the Final Transfer Process

The Final Transfer creates a new record in the school history of each student.

Where no **School History** record with a registered base exists for a student, then the Final Transfer process creates a **School History** record for that student for their allocated receiver base.

The registered base for each student is updated to the receiver school for all students in the transfer group with an allocated receiver base for whom the following circumstances do not apply:

- If a student has an existing **School History** record with a start date on or after the start date on the **Final Transfer Details** window at a registered base that does not match the allocated base, then the Final Transfer routine writes the following message to the error log:

*No update, already at NNNN XXXX" where NNNN is the BASES.DES\_NO and XXXX is the BASES.BASE\_NAME.*

The School History is not updated in this case.

- If a student has an existing **School History** record with a start date on or after the start date on the **Final Transfer Details** window at a registered base that does match the allocated base, then running the Final Transfer routine does not update the **School History**.

However, no message is written to the error log, as the student is already registered at the allocated base.

The records created by the Final Transfer routine, and the routine's treatment of existing records, differs depending on the student's existing school history, registered base, start date and end date:

**Students with existing school history, a registered base, a start date earlier than the Final Transfer parameter start date and no end date:**

**Original School History Record:**

School History Data Item	Value
Registered flag	Changed from <b>True</b> to <b>False</b>
End Date	Set to the <b>End Date</b> specified in the <b>Final Transfer</b> parameters
Leaving Reason	Set to the <b>Leaving Reason</b> specified in the <b>Final Transfer</b> parameters (if the existing school history record does not have a leaving reason)

**New School History Record Created:**

School History Data Item	Value
Base Name	The allocated base
Registered flag	True
Dual Registration flag	False
Guest flag	False
Residential flag	False
Registration Type	MN-S (main registered base, no dual)
Start Date	Set to the <b>Start Date</b> specified in the <b>Final Transfer</b> parameters.
End Date	Null
Days per Week	5.0
Reason for Joining	Set to the <b>Joining Reason</b> specified in the <b>Final Transfer</b> parameters.
Reason for Leaving	Null

**Students with existing school history, a registered base, a start date earlier than the Final Transfer parameter start date and an end date earlier than the Final Transfer parameter end date:**

**Original School History Record:**

School History Data Item	Value
Registered flag	Changed from <b>True</b> to <b>False</b>
End Date	Left untouched
Leaving Reason	Set to the <b>Leaving Reason</b> specified in the <b>Final Transfer</b> parameters (if the existing school history record does not have a leaving reason)

**New School History Record Created:**

School History Data Item	Value
Base Name	The allocated base
Registered flag	True
Dual Registration flag	False
Guest flag	False
Residential flag	False
Registration Type	MN-S (main registered base, no dual)
Start Date	Set to the <b>Start Date</b> specified in the <b>Final Transfer</b> parameters.
End Date	Null
Days per Week	5.0
Reason for Joining	Set to the <b>Joining Reason</b> specified in the <b>Final Transfer</b> parameters.
Reason for Leaving	Null

**Students with no School History**

School History Data Item	Value
Base Name	The allocated base
Registered flag	True
Dual Registration flag	False
Guest flag	False
Residential flag	False
Registration Type	MN-S (main registered base, no dual)
Start Date	Set to the <b>Start Date</b> specified in the <b>Final Transfer</b> parameters.
End Date	Null
Days per Week	5.0
Reason for Joining	Set to the <b>Joining Reason</b> specified in the <b>Final Transfer</b> parameters.
Reason for Leaving	Null

**Students with a School History but no Registered Base and where there is no School History record for the Allocated Base that has a start date on or after the Start Date in Final Transfer parameters**

School History Data Item	Value
Base Name	The allocated base
Registered flag	True
Dual Registration flag	False
Guest flag	False
Residential flag	False
Registration Type	MN-S (main registered base, no dual)
Start Date	Set to the <b>Start Date</b> specified in the <b>Final Transfer</b> parameters.
End Date	Null
Days per Week	5.0
Reason for Joining	Set to the <b>Joining Reason</b> specified in the <b>Final Transfer</b> parameters.
Reason for Leaving	Null

**Students with a School History but no Registered Base and where there is a School History record for the Allocated Base that has a start date on or after the Start Date in Final Transfer parameters**

School History Data Item	Value
Base Name	Left as the allocated base
Registered flag	True (changed from false)
Dual Registration flag	False
Guest flag	False
Residential flag	False
Registration Type	MN-S (main registered base, no dual)
Start Date	Set to the <b>Start Date</b> specified in the <b>Final Transfer</b> parameters.
End Date	Not updated
Days per Week	5.0
Reason for Joining	Not updated
Reason for Leaving	Null



**NOTES:** All new School History records are created with a registration type of MN-S (Main registered base, no dual). Any dual registrations for students need to be recorded manually. The registration type for the registered base School History record should be changed to MN-D manually when recording dual registrations.

The Base Merge routine does not update A&T preferences. If bases that are no longer considered active have been used for preference recording, it is important that the preference continues to reflect the original parent selection.

However, if your LA is using the Final Transfer routine to update the school history, then if the allocated base is the old inactive base then the school history is created for this base. As such, Local Authorities are advised to consider running the Base Merge routine after Final Transfer in this situation.

## Resetting Offer and Allocation Information

The **Reset Processes** section of the **Process | Transfer Groups | Students** page enables you to remove a student's offer/allocation information and start the offer process again from scratch.

There are three processes available from this screen:

- **Reset Allocations:** Retains preferences but clears offer statuses from all preferences in the selected transfer group. This function might be needed if there have been problems in generating or coordinating offer information.

This function is available for Normal Phased transfer groups only. For information on running Reset Allocations, see [Running Reset Allocations](#) on page 204.

- **Clear Preferences:** Removes all preferences from the selected transfer group, enabling you to start again by populating the transfer group with preferences and then carrying out offer processing. This function might be needed if there have been errors in importing the preference data.

This function is available for Normal Phased transfer groups only. For information on running Clear Preferences, see [Resetting Offer and Allocation Information](#) on page 204.

- **In Year Reset:** Clears offer statuses from preferences linked to open applications from the In Year transfer group. This function enables you to commence offer processing for the next process period, treating each application fairly according to the oversubscription criteria.

This function is available for In Year transfer groups only. For information on running In Year Reset, see [Running In Year Reset](#) on page 207.

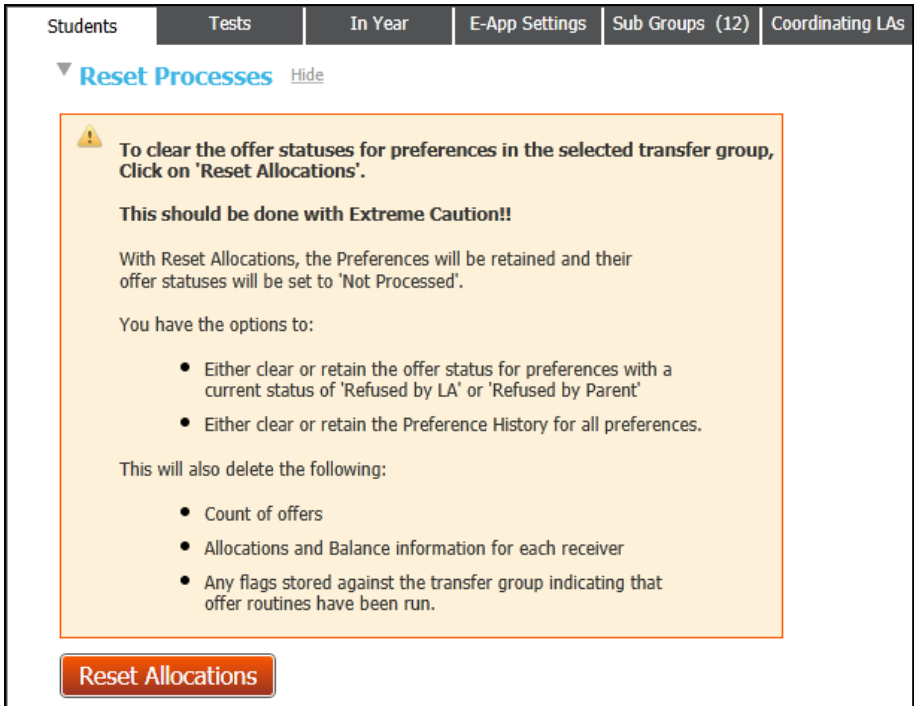
## Running Reset Allocations

**IMPORTANT NOTE:** The Reset Allocations process should be used with extreme caution. It is strongly recommended that your system administrator takes a backup of the CHOICES, CHOICES\_BANDS, TGROUPTS and TG\_BANDS tables before running the process.

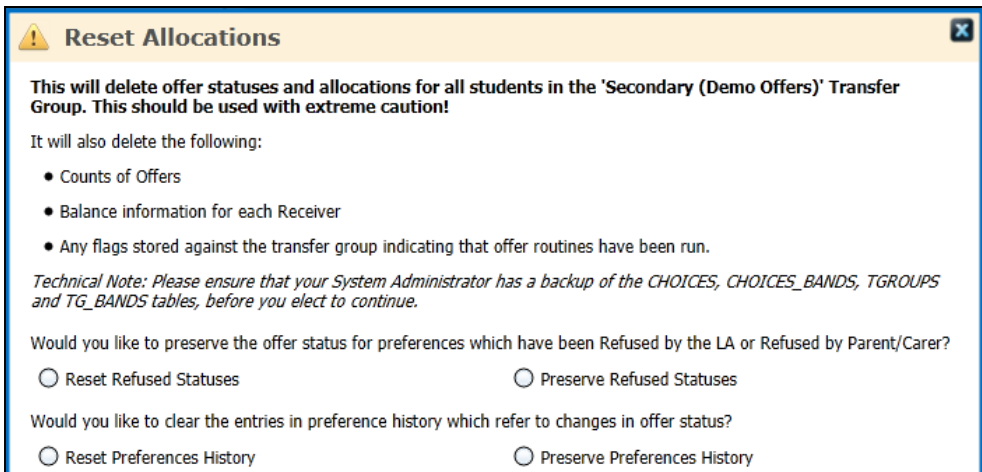
1. Select a Normal Phased transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.

**NOTE:** Reset Allocations can only be run for Normal Phased transfer groups.

2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Reset Processes** section to display the **Reset Allocations** and **Delete Preferences** buttons.



3. Click the **Reset Allocations** button to display the **Reset Allocations** dialog.



4. Select either the **Reset Refused Statuses** or **Preserve Refused Statuses** radio buttons, depending on whether you want to preserve offer statuses which have been refused by the LA or parent / carer.
5. Select either the **Reset Preferences History** or **Preserve Preferences History** radio buttons, depending on whether you want to clear the preference history entries which refer to changes in offer status.
6. Click the **Continue** button to run the process. The offer statuses and allocations for all students in the transfer group are cleared. One also deletes the counts of offers and balance information for each receiver and clears any flags stored against the transfer group that indicate that offer routines have been run.

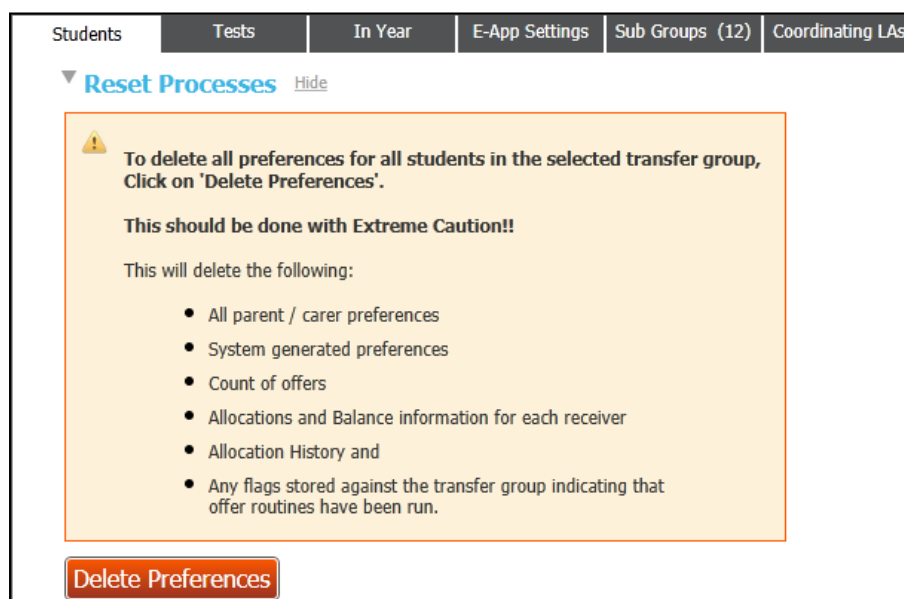
## Running Delete Preferences

**IMPORTANT NOTE:** The Delete Preferences process should be used with extreme caution. It is strongly recommended that your system administrator takes a backup of the APPEALS, CHOICES, CHOICES\_BANDS, TRANSFERS, TGROUPS and TG\_BANDS tables before running the process.

1. Select a Normal Phased transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.

**NOTE:** Delete Preferences can only be run for Normal Phased transfer groups.

2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Reset Processes** section to display the **Reset Allocations** and **Delete Preferences** buttons.



3. Click the **Delete Preferences** button to display a warning dialog.
4. Click the **Continue** button to run **Delete Preferences**. One takes the following actions:
  - Any application preferences in the **Bases | Receivers** and **Students | Applications** areas are cleared and the corresponding records in the following tables are deleted:
    - **Preferences** (CHOICES).
    - **Band preferences** (CHOICES\_BANDS).
    - **Appeals** (APPEALS).
    - **Allocation History** (ALLOC\_PRINT).
  - All counts of offers and allocated (including provisional and accepted) students associated with receivers are deleted for the selected transfer group and the corresponding records in the following tables are deleted:
    - **Receiver counts** (TGROUPS).
    - **Receiver band counts** (TG\_BANDS).
  - Any flags indicating that Make Offers, Resolve Offers, Final Allocation or Publish Offer Information have been run for the transfer group are reset.
  - On the Transfer record, the changed flag and the address id are cleared.

**NOTE:** Withdrawn details are not cleared by Delete Preferences.

## Running In Year Reset

The In Year Reset routine clears down receiver counts relating to the last process period’s vacancies, in preparation for offer processing in the new process period. This routine is important because offer processing in the new process period is based on the vacancies associated with the new process period.

If your LA has previously been through an iteration of Make Offers, Resolve Offers and Final Allocation for an In Year transfer group process period, then you should run the In Year Reset process before starting up the next process period's iteration of Make Offers, Resolve Offers and Final Allocation. If In Year Reset is not run then it won't be possible to re-run Make Offers, since One recognises that Final Allocation has already been run.

In Year Reset also ensures that offer statuses are reset for any open applications, ensuring that offer processing is based on the latest waiting list for each receiver, sorted by oversubscription criteria.

**IMPORTANT NOTE:** *It is essential that you ensure that any completed application is given an application status with an external code of **CLOS** (Closed/Completed) before your local authority runs the In Year Reset process. This is because In Year Reset does not overwrite allocation information for closed or completed applications but does remove existing allocation or offer statuses for non-closed/completed applications.*

1. Select an In Year transfer group. For more information on selecting transfer groups, see [Selecting a Transfer Group](#) on page 82.

**NOTE:** *In Year Reset can only be run for In Year transfer groups.*

2. Ensure that the **Process | Transfer Groups | Students** tab is selected and then open the **Reset Processes** section to display the **In Year Reset** button.

Students Tests In Year E-App Settings Sub Groups (14) Coordinating LAs

Reset Process Hide

**!** To reset offer statuses for preferences within the In-Year transfer group, so that it is ready to commence offer processing in the new process period, Click on 'In Year Reset'.

It is essential that before you run 'In Year Reset', you ensure that

- Any application that has been completed has its Application Status changed to a status with an external code of 'CLOS' (Closed / Completed).

This is because the 'In Year Reset' will not overwrite allocation information for applications marked as Closed / Completed; however it will remove any Allocation / Offer Statuses for any other incomplete applications.

This will:

- Reset the counts of how many places are available for each Base and NCY, based on Vacancies
- Reset allocations for all applications that do not have an Application Status mapped to external code 'CLOS - Closed / Completed'
- Clear any flags stored against the transfer group indicating that offer routines have been run, enabling offer routines to be run for the next period.

**In Year Reset**

3. Click the **In Year Reset** button to display the **In Year Reset** dialog.

**In Year Reset**

It is essential that before you run 'In Year Reset', you ensure that any application that has been completed has its Application Status changed to a status with an external code of 'CLOS' (Closed / Completed). This is because the 'In Year Reset' will not overwrite Allocation information for applications marked as Closed / Completed; however it will remove any Allocation / Offer Statuses for any other incomplete applications.

This will:

- Reset the counts of how many places are available for each Base and NCY, based on Vacancies
- Reset allocations for all applications that do not have an Application Status mapped to external code 'CLOS - Closed/ Completed'
- Clear any flags stored against the transfer group indicating that offer routines have been run, enabling offer routines to be run for the next period

*Technical Note: Please ensure that your System Administrator has a backup of the CHOICES, TGROUPS and TG\_NCY tables, before you elect to continue*

Would you like to preserve the offer status for preferences which have been Refused by the LA or Refused by Parent/Carer?

Reset Refused Statuses  Preserve Refused Statuses

4. Select either the **Reset Refused Statuses** or **Preserve Refused Statuses** radio buttons, depending on whether you want to preserve offer statuses which have been refused by the LA or parent / carer.
5. Click the **Continue** button to run the process. One takes the following actions:
  - Resets the available place counts for each base and NCY, based on vacancies.
  - Resets allocations for all applications that do not have an Application Status with the external code **CLOS** (Closed/Completed).
  - Clears any flags stored against the transfer group which indicate that offer routines have been run, enabling offer routines to be run for the next period.

# 08 | Managing Bases

This chapter covers base management.

## Selecting a Receiver

1. Select **Bases | Receivers** to display search fields relating to receiver details.

2. Enter the Transfer Group Code or Description for the receiver you wish to view.

**NOTE:** Once you have entered a transfer group or description you can click the **Show Offer Counts** hyperlink to view a dialog showing offer statistics for all receivers that match the entered information.

3. Enter a **Sub Group** and / or **Receiver Name** as required.
4. Optionally, click the **More Search Options** hyperlink and select a subset of receivers from the **More Search Options** dialog. The available options are **(Your LA) Only**, **All** or **All with Applications**.
5. Click the **Search** button to view a list of receivers that match your search criteria.

Receiver	Balance	Vacancies	Prefs
Gravenhurst Academy LA: 820 No: 2051	-1	0	1

6. Highlight a receiver to display that receiver's details in the main panel.

Once a particular receiver has been selected, a list of statistics relating to that receiver's preferences and capacity is displayed. This list contains the following information:

- **Balance:** The number of places still available for allocation. The balance is calculated differently depending on whether you are looking at a Normal Phased or In Year transfer group.
  - For Normal Phased transfer groups: Balance = PAN – (Offers Count + Provisional Count + Allocated Count)
  - For In Year transfer groups: Balance = Vacancies – (Offers Count + Provisional Count + Allocated Count)

- **PAN:** The Published Admissions Number for the receiver, as shown on the **Bases | All Bases | PAN & Vacancies** tab. This column is only displayed if you have selected a Normal Phased transfer group. If you have selected an In Year transfer group then the **Vacancies** column is displayed instead.
- **Vacancies:** The total number of vacancies for the receiver, as shown on the **Bases | All Bases | PAN & Vacancies** tab for the earliest current process period. This figure includes all of the receiver's NCYs. The **Vacancies** column is only displayed if you have selected an In Year transfer group. If you have selected a Normal Phased transfer group then the PAN column is displayed instead.
- **Preferences:** The total number of preferences for the selected receiver. This figure excludes preferences where the offer status is **Q** (No Longer Required), **R** (Refused by LA) or **X** (Refused by Parent), as well as withdrawn applications. For In Year transfer groups **Preferences** also excludes preferences that are linked to an application with an **Application Status** of **CLOS** (Closed/Completed).
- **OAA:** If the receiver belongs to a sub group where edit rank is ticked then this column is selected.
- **Offer Counts:**
  - **Offer:** The percentage of students who made the selected receiver a preference and currently have a status of **O** (Offer). The total number of students who match these criteria is also displayed, subdivided into males and females.
  - **Provisional:** The percentage of students who made the selected receiver a preference and currently have a status of **P** (Provisional). The total number of students who match these criteria is also displayed, subdivided into males and females.
  - **Allocated/Accepted:** The percentage of students who made the selected receiver a preference and currently have a status of either **Y** (Allocated) or **A** (Accepted). The total number of students who match these criteria is also displayed, subdivided into males and females.

**NOTE:** Click the **Recalculate Offer Counts** hyperlink to refresh the offer counts manually.

## Viewing a Receiver's Preferences

1. Select a receiver. For more information on selecting receivers, see [Selecting a Receiver](#) on page 209. A list of preferences that have been recorded for that receiver is displayed.

The screenshot shows the 'Gravenhurst Academy 820 2051 | Academy (Primary)' interface. At the top, it displays 'Balance: -1', 'Vacancies: 0', 'Preferences: 1 (+0 Refused)', and 'Selective: No'. Below this is a 'Preferences' section with a search bar for 'Find Student: Surname or Surname & Forename', a 'Home LA Students only' checkbox, and a 'Select NCY' dropdown menu. A toolbar contains 'Wide View', 'Export', and 'Print' options. The main table shows one preference:

Row	Rank	NCY	Offer Status	Name	SEN	Home LA	Current Base	P Care	Named
1		4	Allocated	Sheppard, M   10/05/2010	P	820	Legrave Junior School		

2. Optionally, use the controls on the toolbar to filter the list of preferences. The following controls are available:
  - a. **Home LA Students Only** check box: filters the list to display only preferences from Home LA students.
  - b. **Sort by Oversubscription Criteria** check box: sorts the list by the oversubscription criteria displayed.

**NOTE:** The oversubscription criteria displayed in the list are those specified for the sub group that includes the selected receiver. If banding is in use and a band has been selected, the oversubscription criteria that apply to the selected band are displayed. The criteria are displayed in the order in which they are used during the allocation of places. If no oversubscription criteria have been specified then all are displayed.

- c. **Banding** drop-down menu: enables you to select a specific band (if banding is in use at the receiver).
  - d. **All preferences** drop-down menu: enables you to select preferences with a particular offer status.
  - e. **Select NCY** field: enables you to select preferences from students in a particular NCY (In Year transfer groups only).
  - f. **Find Student** field: enables you to search for a specific preference by entering a student's surname or forename.
3. If required, view the **Preference History** dialog for a student by clicking on that student's offer status.
  4. If required, view the **Application Details** dialog for a student by clicking on that student's name. For more information on managing student application details, see [Editing Application Details](#) on page 15.



## Updating Offer Status

1. Select a receiver. For more information on selecting receivers, see [Selecting a Receiver](#) on page 209. A list of preferences for that receiver is displayed.

Gravenhurst Academy 820 2051 | Academy (Primary) More options...

Balance: -1 Vacancies: 0 Preferences: 1 (+0 Refused) Selective: No

Preferences

Home LA Students only All preferences

Find Student: Surname or Surname & Forename

Clear Selection

2 Preferences Wide View Export Print

Row	Rank	Offer Status	Name	SEN	Home LA	Current Base	Late P Care	Nan
<input type="checkbox"/>	1	Accepted	15297, Student05 M   03/01/2004		820	Mayflower School		
<input checked="" type="checkbox"/>	2		15297, Student09 F   09/01/2004		820	Brickhill Lower School		

Waiting List Update Status Update Preferences

2. Use the check boxes to select the preference(s) whose offer status you want to update.
3. Select an offer status from the **Select Offer Status** drop-down box and then click the **Update Status** button.

One's response at this point depending on the status you selected and whether the application is part of an In Year transfer group. If you selected:

- **Offer:** The offer status changes to **O** (Offer).

Offers can only be made for undersubscribed schools (validation is performed against the PAN (for Normal Phased admissions) or **Vacancies** number (for In Year admissions), unless the student record is marked with an **Exceptional** or **Appeals** flag in **Application Details**. If you attempt to make an offer for the school that would take it over PAN, a message is displayed enabling you to update the exceptional flag and the offer status at the same time.

When offers have been made you can use **Update Ranks** rather than resetting the allocations.

For an In Year transfer group, if the **Date Place Required** for the application is earlier than the opening date or later than the closing date of the earliest current process period offer date (a current process period is one where today's date is between the start date and the offer date) then you must confirm before continuing. You should check whether it is appropriate to offer the place under these circumstances.

- **Provisionally Allocate:** The offer status changes to **P** (Provisional).

Only undersubscribed schools are available for provisional allocation (validation is made against the PAN or vacancies), unless the student record is marked with an exceptional or appeals flag in the **Application Details**. If the PAN has been reached for the school, a message is displayed enabling you to update the exceptional flag and the offer status at the same time.

For In Year transfer groups, if the **Date Place Required** for the application is earlier than the opening date or later than the closing date of the earliest current process period offer date (a current process period is one where today's date is between the start date and the offer date) then you must confirm before continuing. You should check whether it is appropriate to allocate the place under these circumstances.

- **Allocate:** The offer status is updated to **Y** (Allocated), the preference base is set as the application's allocated base and the allocated date is set.

For In Year transfer groups, if the **Date Place Required** for the application is earlier than the opening date or later than the closing date of the earliest current process period offer date (a current process period is one where today's date is between the start date and the offer date) then you must confirm before continuing. You should check whether it is appropriate to allocate the place under these circumstances.

- **Waiting List:** The offer status is updated to **W** (Waiting List).

The student is added to the ranked waiting list at the selected base and provisionally allocated to that base's next preference. If a place subsequently becomes available at the first preference then you are able to offer the student a place but you should then review and free up the place at the next preference.

- **No Current Offer:** The status changes to **Y** (Allocated) in the No Offers base and the student is ignored in the Offer processes. You should rerun the Resolve Offers routine at this point, as places may have become available.
- **Log Parent Acceptance:** The offer status is updated to **A** (Accepted), the preference base is stored against the application as the allocated base and the allocated date is set. The parental response in the Application details are updated to **AC** (Accept).
- **Log Parent Refusal:** You are asked to confirm this update before proceeding. If you confirm, their offer status for this preference is updated to **X** (Refused by Parent).

At this point, you should review the student's preferences to ensure that they have a place elsewhere. The parental response in the application details are updated to **RJ** (Reject).

- **Refused by Local Authority:** You are asked to confirm the status update before proceeding. If you confirm, their offer status for this preference is updated to **R** (Refused by LA).

At this point, you should review their preferences to ensure that they have a place elsewhere and run Resolve Offers to fill the vacated place.

**NOTE:** Locale 4 (Northern Ireland) LAs are not prompted to confirm that they wish to set the preference to **Refused by LA**. These LAs also have the option of using the **Refuse and Move** function, which sets a student's first preference to **Refused by LA** and creates a new, provisionally allocated preference for an alternative receiver at the same time.

For more information on using **Refuse and Move**, see [Refusing and Moving Preferences \(Northern Ireland only\)](#) on page 217.

- **No Longer Required:** The Offer Status updates to **Q** (No Longer Required).
- **Not Processed:** This sets the preference back to its pre-offer processing state. The offer status column is cleared (i.e. set to null) and the preference is included in Resolve Offers.

## Re-Ranking Waiting List

The Re-Rank Waiting List function enables you to re-rank all preferences for the receiver that have an offer status of either **No Offer** or **Waiting List**, regardless of whether or not they have a current rank. Preferences with other offer statuses (including those with a status of **Not Processed**) are not affected.

Re-ranking means that any late preferences that were not included in the Make Offers ranking process can subsequently be considered for allocation in the next run of Resolve Offers if places are available. Resolve Offers only considers allocating places to preferences with a rank and an offer status of **No Offer** or **Waiting List**.

This function is only available for receivers in subgroups that are not marked as **Edit Rank**.

1. Select a receiver. For more information on selecting receivers, see [Selecting a Receiver](#) on page 209.

The screenshot shows the 'Receivers' interface. On the left, there's a search bar with 'BIT - 2013 - Bhalinz TG' and a 'Search' button. Below it, a table lists search results for 'BIT - Bhalinz TG, All'. The first result is 'Mark Rutherford Secondary School' with a balance of 0, PAN of 4, and 7 preferences. On the right, the details for 'Mark Rutherford Secondary School' are shown, including its address and a summary of preferences. Below this, there's a 'Preferences' section with a search bar and a table of 7 preferences. The 'Re-rank Waiting List' button is highlighted in red.

Receiver	Balance	PAN	Prefs
Mark Rutherford Secondary School LA: 820 No: 4017	0	4	7
Millennium School (Aptitude) LA: 820 No: 4750	4	4	1
Redborne Community College LA: 820 No: 4097	4	4	1
UNC:A+T Dummy / No Form LA: 820 No:	0	0	0
UNC:A+T No Offer LA: 820 No:	0	0	0

Row	Rank	Offer Status	Name	SEN	Home LA	Current Base	Memo	Catch
1	1	Allocated	Green, _____ M   11/04/2002			Pinchmill School (p4mt)		
2	2	Allocated	Green, _____ M   13/02/2002			Pinchmill School (p4mt)		
3	3	Allocated	Williams, _____ F   21/02/2002			Pinchmill School (p4mt)		

2. Click the **Re-rank Waiting List** hyperlink. A confirmation dialog is displayed.
3. Click the **Re-rank** button. Any eligible preferences are ranked in order of oversubscription criteria.

**NOTE:** When re-ranking the waiting list One ranks the highest sorted preference (by oversubscription criteria) that has a current offer status of **N** or **W** with a new rank which is 1 more than the current lowest ranked preference of any offer status for the receiver. This ensures that there are no duplicate ranks for the receiver, and means that there may be some (potentially large) gaps in ranks. Running Re-Rank Waiting List repeatedly for a given receiver may create additional large gaps. This can help to identify that the re-ranking process has taken place. Updating ranks does not cause the offer status to be updated.

## Updating Ranks (for OAA Schools)

**Update Ranks** enables you to enter or edit preference rankings for OAA receivers. You can use this function to enter a single preference into a specific place in the ranking list.

**Update Ranks** can only be used once at least one rank has been recorded for a particular receiver.

1. Select an OAA receiver. For more information on selecting receivers, see [Selecting a Receiver](#) on page 209.

The screenshot shows the 'Receivers' interface. On the left, a search for 'BIT - Bhalinz TG' yields 5 matches. The main area displays details for 'Mark Rutherford Secondary School' (820 4017, Secondary - Community). It shows 7 preferences, all with an 'Allocated' status. At the bottom, the 'Update Ranks' link is highlighted with a red box.

Receiver	Balance	PAN	Prefs
Mark Rutherford Secondary School LA: 820 No: 4017	0	4	7
Millennium School (Aptitude) LA: 820 No: 4750	4	4	1
Redborne Community College LA: 820 No: 4097	4	4	1
UNC:A+T Dummy / No Form LA: 820 No:	0	0	0
UNC:A+T No Offer LA: 820 No:	0	0	0

Row	Rank	Offer Status	Name	SEN	Home LA	Current Base	Memo	Catch
1	1	Allocated	Green, M   11/04/2002			Pinchmill School (p4mt)		
2	2	Allocated	Green, M   13/02/2002			Pinchmill School (p4mt)		
3	3	Allocated	Williams, F   21/02/2002			Pinchmill School (p4mt)		

2. Click the **Update Ranks** hyperlink to display the **Update Ranks** dialog.

The 'Update Ranks' dialog box is shown for 'Pinchmill School (p4mt) 820 2041'. It displays 16 preferences. The first two are highlighted in yellow:

Rank	Offer Status	Name	SEN	Home LA	Current Base	Late	P Care	Named	Sib	Catch	Distance	Sp Reason 1	Sp R
1	Waiting List	Abrams, F   08/06/2011		820	Test Nursery	✓	✓			✓	2.76		
2	Waiting List	Bailey, F   26/03/2011		820	Test Nursery	✓			✓	✓	1.236		

3. Enter a new rank for each preference that you wish to update.
4. Click the **Save** button to save your changes. One validates the ranking.
5. If you entered any duplicate ranks, One displays a dialog reading "Rank X already exists, do you wish to revise the existing ranks from this point to increment them by 1?":
  - Click the **Yes** button to increment all lower-ranked preferences by one and close the dialog.
  - Click the **No** button to return to the **Update Ranks** dialog and re-rank the preferences manually.

**NOTE:** When a preference whose previous status was either **P** (Provisional) or **W** (Added to Waiting List) is refused by the Local Authority or parent, then that preference's rank is updated in the **ALLOC\_RANK** field. In all other cases (including **Bulk Allocation** and **Manual Allocation**) the allocation rank is set to Null (not Processed).

## Updating a Receiver's Preference Reasons

1. Select a receiver. For more information on selecting receivers, see [Selecting a Receiver](#) on page 209.

The screenshot shows the 'Receivers' interface. On the left, a search for 'BIT - Bhalinz TG' yields 5 matches. The main area displays details for 'Mark Rutherford Secondary School' (820 4017). It shows 'Balance: 0', 'PAN: 4', and 'Preferences: 7 (+0 Refused)'. Below this, there are options to filter preferences (e.g., 'Home LA Students only') and a search field for students. A table lists 7 preferences, all with an 'Allocated' status. At the bottom, there are buttons for 'Update Status', 'Update Preferences' (highlighted with a red box), and 'Update Ranks'.

Receiver	Balance	PAN	Prefs
Mark Rutherford Secondary School LA: 820 No: 4017	0	4	7
Millennium School (Aptitude) LA: 820 No: 4750	4	4	1
Redborne Community College LA: 820 No: 4097	4	4	1
UNC:A+T Dummy / No Form LA: 820 No:	0	0	0
UNC:A+T No Offer LA: 820 No:	0	0	0

Row	Rank	Offer Status	Name	SEN	Home LA	Current Base	Memo	Catch
1	1	Allocated	Green, M   11/04/2002			Pinchmill School (p4mt)		
2	2	Allocated	Green, M   13/02/2002			Pinchmill School (p4mt)		
3	3	Allocated	Williams, F   21/02/2002			Pinchmill School (p4mt)		

2. Click the **Update Preferences** hyperlink to display the **Update Preferences** dialog.

The 'Update Preferences' dialog box is shown for 'Pinchmill School (p4mt) 820 2041'. It includes a search field for students and a table of 16 preferences. The table has columns for Rank, Name, Pref, SEN, Home LA, Current Base, Late, Addr Ver, P Care, Named, Sib, Catch, Feeder, Distance, Religion, Test, and Medical. Two preferences are visible: one for 'Abrams, F | 08/06/2011' with a distance of 2.76, and one for 'Bailey, F | 26/03/2011' with a distance of 1.236.

Rank	Name	Pref	SEN	Home LA	Current Base	Late	Addr Ver	P Care	Named	Sib	Catch	Feeder	Distance	Religion	Test	Medical
1	Abrams, F   08/06/2011	1		820	Test Nursery	✓		✓			✓		2.76			
2	Bailey, F   26/03/2011	1		820	Test Nursery	✓	✓			✓	✓		1.236			

3. Optionally, enter a student surname and/or forename into the **Find Student** field to search for a particular preference.
4. Use the check boxes to select the reasons for each preference.
5. If required, enter a **Distance**.
6. If required, select a school gender from the **Gender** drop-down menu.
7. Click the **Save** button to update the receiver's preferences and close the dialog.

## Refusing and Moving Preferences (Northern Ireland only)

The **Refuse and Move** function is only available to LAs in Northern Ireland. This routine supports the process used in Northern Ireland in situations where a student cannot be allocated to their first-choice school, enabling LAs to refuse the existing preference and create a lower-ranked preference for another receiver in one action.

To use the **Refuse and Move** function:

1. Select a receiver. For more information on selecting receivers, see [Selecting a Receiver](#) on page 209.

The screenshot shows the 'Receivers' interface. On the left, there's a search filter for 'PR1 - Primary, All' with a 'Search' button. Below it, a table lists 3 matches:

Receiver	Balance	PAN	Prefs
Queen Anne Secondary School LA: 820 No: 4040	-1	0	1
UNC:A+T Dummy / No Form LA: 820 No:	999	999	0
UNC:A+T No Offer LA: 820 No:	999	999	0

The right pane shows the details for 'Queen Anne Secondary School 820 4040'. It displays 'Balance: -1 PAN: 0 Preferences: 1 (+0 Refused) Selective: No'. Under 'Preferences', there's a search box and a table with 1 preference:

Row	Rank	Offer Status	Name	SEN	Home LA	Current Base	Late P Care	Nam
1		Allocated	Sheppard, M   10/05/2010	P	820	Legrave Junior School		

At the bottom, there are buttons for 'Update Status', 'Refuse and Move', and 'Update Preferences'.

2. If you are viewing a banded receiver, select a band from the **Select Band** drop-down menu.
3. Use the check boxes to select one or more preferences from the list.
4. Click the **Refuse and Move** hyperlink to display the **Select an Alternative Receiver** dialog.

The dialog box is titled 'Select an alternative Receiver to provisionally allocate the selected student(s)'. It has a search filter section with 'Filter By' options: 'Base Type', 'Base Control', and 'Receiver, LA or School No.'. There are radio buttons for 'Home LA', 'Other LA', and 'All Bases' (selected). A 'Clear Search' button is also present.

Below the filter is a table of receivers:

Receiver	LA	Sch. No.	Sub Group
A B C Day Nursery	103		
Aghyaran Community Playgroup	102		

At the bottom right, there are 'Cancel' and 'Select' buttons.

**NOTE:** The **Refuse and Move** hyperlink is only displayed for LAs who have the **LOCALE** parameter set to a value of 4 (Northern Ireland).

5. If required, use the filters to filter the list of available receivers.

6. Highlight the receiver you wish to create a new preference for and then click **Select**. One performs the following actions:
  - Sets preferences for the original receiver or receivers to Refused by LA
  - Creates a new preference for the selected receiver
  - Updates the selected student's Preference History and the Receiver Summary count accordingly
  - Updates the main preference's offer status and Band Summary count (banded receivers only)
  - Closes the dialog.

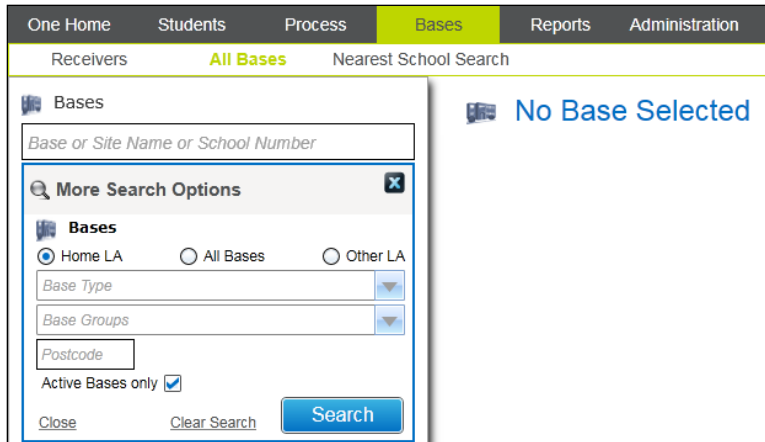
### Preferences Created By the Refuse and Move Routine

Preferences created as a result of the Refuse and Move process abide by the following rules:

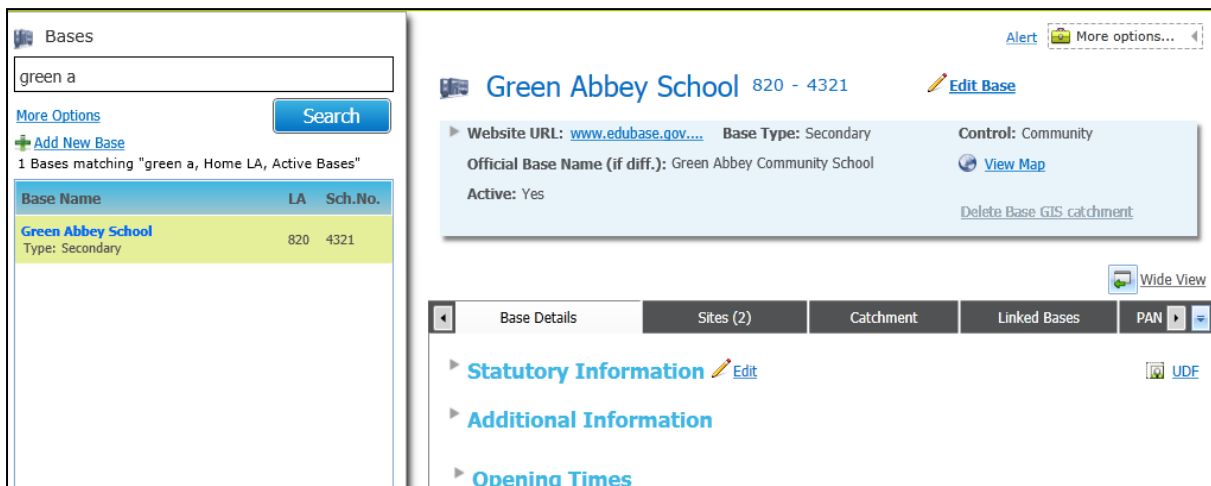
- **Preference Base** is the selected receiver.
- **Offer Status** is Provisionally Allocated (choices.allocate\_flag='P')
- **Preference Number** is the next available parental preference number (which is one more than the current highest parental preference number). For example:
  - If the student currently has only one existing preference with preference number 1, then the preference number for the new preference is 2
  - If the student currently has two existing preferences with preference number 1 and 3, then the preference number for the new preference is 4
- If one or more selected student(s) already have a preference for the selected receiver, then:
  - One creates provisionally allocated preferences for any selected students who do not already have a preference for the selected receiver.
  - For those students who already have a preference for the selected receiver and whose current main preference offer status is not Offered, Allocated, Accepted or Provisional, One sets the offer status of the existing preference for the selected receiver to Provisional. The preference number is not updated.
  - For those students who already have a preference for the selected receiver and whose current main preference offer status is Offered, Allocated, Accepted or Provisional, One displays an error message for each affected student.
- Where you select a banded school that the student already has a preference for (with a main offer status other than Offered, Allocated, Accepted or Provisional) as the new provisional receiver and the student is already linked with one or more bands, the following applies:
  - If the student is associated with only one band, then One updates both the main offer status and the linked band offer status to Provisional, and updates the receiver and band counts to reflect the extra Provisional status?
  - If the student is associated with more than one band, then One displays an error message, as it does not know which band is affected. At this point, you should review the student application and manually update the correct band to Provisional.

## Selecting a Base

1. Select **Bases | All Bases** to view search fields relating to base details.



2. Enter the **Base Name**, **Site Name** or **School Number** of the base you wish to view into the **Base or Site Name or School Number** field.
3. Optionally, use the **More Search Options** dialog to refine your search:
  - a. Click the **More Options** hyperlink to view the **More Search Options** dialog.
  - b. Select whether you wish to search for **Home LA** bases, **Other LA** bases, or **All Bases**.
  - c. Enter **Base Year**, **Base Groups** and **Postcode** information as required.
  - d. If you wish to limit your search to active bases, select the **Active Bases Only** check box.
4. Click the **Search** button to view a list of bases that match your search criteria.



5. Highlight a base to select it.



## Editing a Base

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.

The screenshot shows the 'Bases' search interface. On the left, a search box contains 'green a' and a 'Search' button. Below it, a table lists search results:

Base Name	LA	Sch.No.
Green Abbey School Type: Secondary	820	4321

The main area displays details for 'Green Abbey School 820 - 4321'. It includes an 'Edit Base' link and a summary box with the following information:

- Website URL: [www.edubase.gov.uk](http://www.edubase.gov.uk)
- Base Type: Secondary
- Control: Community
- Official Base Name (if diff.): Green Abbey Community School
- Active: Yes

Below the summary box are tabs for 'Base Details', 'Sites (2)', 'Catchment', 'Linked Bases', and 'PAN'. The 'Base Details' tab is active, showing expandable sections for 'Statutory Information', 'Additional Information', and 'Opening Times'.

2. Click the **Edit Base** hyperlink on the toolbar to display editable fields relating to base details.

The screenshot shows the 'Edit Base' form for 'Green Abbey School'. The form contains the following fields and options:

- Base Name: Green Abbey School
- LA No.: 4321
- Base No.: 820
- Website URL: [www.edubase.gov.uk](http://www.edubase.gov.uk)
- Base Type: SEC - Secondary
- Control: CO - Community
- Official Base Name: Green Abbey Community School
- Active:
- Selective:
- ORD - Mainstream LA School (IFS):
- Co-Ed:
- B2B Student Base:
- Address: 2 Duckmill Lane, Bedford, MK42 0AL
- Principal Site Address: Green Abbey School, Burnaby Road, Bedford, Bedfordshire, MK42 1GH

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form.

3. Enter a **Base Name**, **LA No.** and **Base Type**.
4. Enter a **School No.**, **Website URL**, **Base Control** (the entity that controls the base, for example **Community** or **Independent**), **SEN School Type**, **Gender**, **Base Address** and **Principal Site Address** as required.
5. If the school is selective, select the **Selective** checkbox.
6. If the school is a B2B Student base, select the **B2B Student Base** check box.
7. Click the **Save** button to save your changes.

## Adding Base Information from the UK Bases Table

The **Add From UK Bases** function enables you to copy base details from a school in the UK Bases table. Copying information in this way can help you to ensure that A&T base information is consistent with base information used in other areas of One, and can also help to save time.

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Click the **Edit Base** hyperlink on the toolbar to display editable fields relating to base details.

3. Click the **Add From UK Bases** hyperlink. A confirmation dialog is displayed.
4. Click the **Yes** button to display the **School Search from UK Bases** dialog.

5. Enter the **School No or School Name** of the base whose details you wish to copy.
6. Enter **LA** and / or **Gender** details as required and then click the **Search** button to view a list of the bases in the UK Bases table that match your search criteria.

7. Highlight the base whose details you wish to copy and then click the **Select** button to copy that base's details to the edited base and close the dialog.
8. Click the **Save** button to save your changes.

## Editing Statutory / Additional Base Information

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Ensure that the **Base Details** tab is selected and then select the **Edit** hyperlink. The fields in both the **Statutory Information** and **Additional Information** sections become editable.

3. Fill out the fields in the **Statutory Information** section as required. The following fields are available:
  - **Former Control:** The type of relationship the Local Authority had with the base prior to 1998, when the Schools Standards and Framework Bill became law. The list is populated from Lookup Table 0006.
  - **Statutory Return Group:** Used for DfE Returns, such as the Annual Service Return. Select an appropriate group from the drop-down list. The list is populated by the v3 Personnel module and only has contents if the Local Authority currently has or previously had a v3 Personnel module license.
  - **Education Office:** The base's Education Office. Populated from lookup table 0013.
  - **Governing Body:** The governing body for the base. Use the browse to select the appropriate body. The browse is populated from the Governing Bodies table. This table is only available if the Local Authority has a current Governors module license or if the Local Authority previously had a Governors module license. In the latter case the Governing Bodies table only holds the original data.
  - **URN:** A 6 digit Unique Reference Number by which the DfE recognises individual schools. The number is allocated by the DfE.
  - **Cost Centre:** A reference number allocated to the base for use in the Local Authority financial information system.
  - **Nursery Type:** Defined if the base is a nursery school or unit. This field is populated from the Lookup Table 0432.
4. Fill out the fields in the **Additional Information** section as required. The following fields are available:
  - **Teaching Medium:** Enables Welsh authorities to record the language used as the teaching medium in the school. The list is populated from Lookup Table 0034.

- **Employment Type:** Used for pseudo bases only (e.g. Teacher Training bases) so that DfE returns can assign employees at these bases to the correct tables.
  - **Short Code:** Enables you to enter a short code into the school name search field rather than a partial name.
  - **XML Transfer Base:** If this check box is selected, the base is included in the list when the Local Authority checks the activity log in XML Data Exchange for bases with or without imports at a given date. This check box is automatically selected if the base has had an import via XML Data Exchange. It can also be manually selected.
  - **LA Gateway:** This check box must be selected if the school is sending attendance data to the web based Local Authority Gateway, which may be accessed via Internet Explorer.
  - **B2B Personnel Base:** Makes the base selectable in B2B Personnel.
  - **In Statutory Return:** Indicates that the base will be included in DfE returns and is also used in routines in School Census, CTF and SEQUEL. Deselecting this box enables "dummy" bases used in A&T to be excluded from such returns. Selected for all home LA bases by default.
  - **Children's Centre No.**
  - **B2B Student Base:** Makes the base selectable in B2B Student.
  - **Parents Gateway URL**
  - **Catering Area:** Populated from Lookup Table 0093.
  - **Cleaning Area:** Populated from Lookup Table 0092.
  - **Grounds Maintenance:** Populated from Lookup Table 0091.
5. Click the **Save** button to save your changes.

## Editing Term Opening Times

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Ensure that the **Base Details** tab is selected and open the **Opening Times** section. A table of term dates is displayed.

Term	Start Date	End Date	Half Term Start Date	Half Term End Date	Term Notes
AUT - Autumn Term	01/09/2018	31/12/2018	22/10/2018	26/10/2018	<a href="#">Edit</a> <a href="#">Delete</a>
SPR - Spring Term	01/01/2019	30/04/2019	18/02/2019	22/03/2019	<a href="#">Edit</a> <a href="#">Delete</a>
SUM - Summer Term	01/05/2019	31/08/2019	27/05/2019	31/05/2019	<a href="#">Edit</a> <a href="#">Delete</a>

3. Select the academic year of the term you wish to edit from the **Term Details for Academic Year** drop-down menu.
4. Click a term's **Edit** hyperlink to display editable fields relating to that term.

**Opening Times**

Term Details for Academic Year : 2018-2019 [+ Add New Academic Year](#)

AUT - Autumn Term \*    01/09/2018 \*    31/12/2018 \*  
 22/10/2018    26/10/2018

[Cancel](#)    [Save](#)    [+ Add Term](#)

Term	Start Date	End Date	Half Term Start Date	Half Term End Date	Term Notes
AUT - Autumn Term	01/09/2018	31/12/2018	22/10/2018	26/10/2018	<a href="#">Edit</a> <a href="#">Delete</a>
SPR - Spring Term	01/01/2019	30/04/2019	18/02/2019	22/03/2019	<a href="#">Edit</a> <a href="#">Delete</a>
SUM - Summer Term	01/05/2019	31/08/2019	27/05/2019	31/05/2019	<a href="#">Edit</a> <a href="#">Delete</a>

**NOTE:** To add a new term, click the **Add Term** hyperlink instead of selecting an existing term. The fields displayed are the same whether you are editing an existing term or adding a new one.

5. Select the **Term** (name), **Start Date** and **End Date**.
6. Optionally, enter a **Half Term-Start Date** and **Half Term-End Date**.
7. Click the **Save** button to save your changes.

**NOTE:** Click a term's **Delete** hyperlink to delete that term.

## Adding a New Academic Year

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Ensure that the **Base Details** tab is selected and open the **Opening Times** section. A table of term dates is displayed.

Base Details    Sites (2)    Catchment    Linked Bases    P

**Opening Times**

Term Details for Academic Year : 2018-2019 [+ Add New Academic Year](#)    [+ Add Term](#)

Term	Start Date	End Date	Half Term Start Date	Half Term End Date	Term Notes
AUT - Autumn Term	01/09/2018	31/12/2018	22/10/2018	26/10/2018	<a href="#">Edit</a> <a href="#">Delete</a>
SPR - Spring Term	01/01/2019	30/04/2019	18/02/2019	22/03/2019	<a href="#">Edit</a> <a href="#">Delete</a>
SUM - Summer Term	01/05/2019	31/08/2019	27/05/2019	31/05/2019	<a href="#">Edit</a> <a href="#">Delete</a>

3. Click the **Add New Academic Year** hyperlink to display the **Add I** dialog.

**Add New Academic Year**

Academic Year :

[Cancel](#)    [Save](#)

4. Enter an academic year in the YYYY format and then click the **Save** button to add the year and close the dialog. The entered year is now selectable from the **Term Details for Academic Year** drop-down menu.

## Adding Sites

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **Sites** tab to view a list of the base's sites.



3. Click the **Add Site** hyperlink to display editable fields relating to site details.

**Site Details** UDF

Principal Site:

<input type="text" value="Telephone"/>	<input type="text" value="Telephone (2)"/>	<input type="text" value="Fax"/>	<input type="text" value="Email"/>
<input type="text" value="Date Opened(mm/yyyy)"/>	<input type="text" value="Date Closed(mm/yyyy)"/>	<input type="text" value="Property Ref No."/>	
<input type="text" value="Electoral Ward"/> <input type="button" value="Search"/>	<input type="text" value="Parish"/> <input type="button" value="Dropdown"/>	<input type="text" value="Parliam.Const"/> <input type="button" value="Dropdown"/>	

**Site Contacts**

<input type="text" value="Caretaker"/>	<input type="text" value="Caretaker Telephone"/>	<input type="text" value="Site Url."/>
<input type="text" value="Key Holder"/>	<input type="text" value="KeyHolder Telephone"/>	<input type="text" value="Site Type"/> <input type="button" value="Dropdown"/>
<input type="text" value="Transport Contact"/>	<input type="text" value="Transport Telephone"/>	<input checked="" type="checkbox"/> Active Site:

**NOTE:** To edit an existing site instead of adding a new one, click a site's **Edit** hyperlink instead of selecting **Add Site**. The fields displayed are identical whether you are adding a new site or editing an existing one.

4. Enter site details as required. All fields except **Site Name** are optional.
5. Click the **Save** button to save your changes.

**NOTE:** You can also edit a base's address history from the **Bases | All Bases | Sites** tab. For more information on editing address history, see [Editing the Address History](#) on page 76.

## Adding Gates

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **Sites** tab to view a list of the base's sites.



3. Select a site's **Edit** hyperlink to display editable fields relating to that site.

## Managing Bases

**Green Abbey Community School,** [Edit](#) UDF

[Green Abbey School, Burnaby Road, Bedford, Bedfordshire, MK42 1GH](#)

Green Abbey Community School, \*

Green Abbey School, Burnaby Road, Bedford, Bedfordshire, MK42 1GH [Map](#) [Home](#) **Principal Site:**

**Site Contacts**

**Active Site:**

**Gates** 2 Gates Defined.

[+ Add Gate](#)

- Click the **Add Gate** hyperlink to display editable fields relating to gate details.

**Gates**

[+ Add Gate](#) [Cancel Add Gate](#)

Gate Name	Main Gate	Open	Easting	Northing	
<input type="text" value="Gate Name"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Easting"/>	<input type="text" value="Northing"/>	
North East Gate	Yes	Yes	505312	250704	<a href="#">View Map</a>
South West Gate	No	Yes	505053	250092	<a href="#">View Map</a>

- Enter the **Gate Name**.
- If the gate is a main gate, select the **Main Gate** check box.
- If the gate is normally open, select the **Open** check box.
- Enter **Easting** and **Northing** co-ordinates as required.
- Click the **Save** button to save your changes.

**NOTE:** Existing gates are displayed in the **Gates** list. Select a gate's **Edit** hyperlink to edit that gate, or click **Delete** to delete the gate.

## Editing a Base's Postcode Catchment Areas

The **Bases | All Bases | Catchment** tab enables you to view and edit a base's postcode catchment areas. You can edit catchment areas either by selecting them manually, or by copying them from another base.

### Editing Catchments Manually

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **Catchment** tab to view a list of the base's existing postcode catchment areas.

Postcode	Address1	Address2	Address3	Town	County
<a href="#">MK42 0AL</a>	Duckmill Lane			Bedford	
<a href="#">MK42 0AS</a>	St Marys Street			Bedford	

3. If required, enter values into the **Postcode**, **Town** and **Country** fields and then click the **Search** button to filter the list of catchments.
4. Click the **Edit** hyperlink to view an editable list of all available catchment areas. The existing catchments are displayed at the top of the list.

Postcode	Address1	Address2	Address3	Town	County
<input checked="" type="checkbox"/> <a href="#">MK42 0AL</a>	Duckmill Lane			Bedford	
<input type="checkbox"/> <a href="#">MK42 0BE</a>	Rays Close			Bedford	
<input type="checkbox"/> <a href="#">MK42 0DE</a>	Alamain Avenue			Bedford	

5. Select the check boxes for the postcode catchments that you wish to use for the selected base. You can de-select existing catchments if required.
6. Click the **Save** button to save your changes.



## Copying Catchments from another Base

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **Catchment** tab to view a list of the base's existing postcode catchment areas.

Base Details	Sites (2)	Catchment	Linked Bases	F	
3 Postcode Areas in this Base's Catchment <span style="float: right;"><a href="#">Edit</a> <a href="#">Copy Catchment from Base</a></span>					
Filter By					
<input type="text" value="Postcode"/>	<input type="text" value="Town"/>	<input type="text" value="County"/>	<a href="#">Remove All Catchment</a>		
Postcode	Address1	Address2	Address3	Town	County
<a href="#">MK42 0AL</a>	Duckmill Lane			Bedford	
<a href="#">MK42 0AS</a>	St Marys Street			Bedford	

3. Click the **Copy Catchment from Base** hyperlink to display the **Choose Base To Copy Catchment From** dialog.

**Choose Base To Copy Catchment From** ✕

Base Name	School Number
<a href="#">Abbey Middle School</a>	4001
<a href="#">Acorn Nursery</a>	

4. Optionally, enter a **Base name or School Number** to filter the list of bases.
5. Highlight a base and then click the **Select** button. A confirmation message is displayed.
6. Click the **Continue** button to copy the base's postcode catchments to the original base and close the dialog.

## Link Receivers to a Base

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **Linked Bases** tab to view lists of the selected base's feeders and receivers.

Base Details	Sites (1)	Catchment	Linked Bases	PA	
<b>Linked Receivers</b>		<b>Linked Feeders</b>			
<input type="text" value="Base Name or School No."/> <span style="float: right;"><a href="#">Edit</a></span>		<input type="text" value="Base Name or School No."/>			
<input type="radio"/> Home LA <input checked="" type="radio"/> All Bases <input type="radio"/> Other LA <span style="float: right;"><a href="#">Search</a></span>		<input checked="" type="radio"/> Home LA <input type="radio"/> All Bases <input type="radio"/> Other LA <span style="float: right;"><a href="#">Search</a></span>			
Base Name	School No.	LA	Base Name	School No.	LA
<a href="#">Bluestine School</a>	4402	820	<a href="#">Green Abbey School</a>	4321	820

3. Click the **Edit** hyperlink to display a list of available linked receivers.



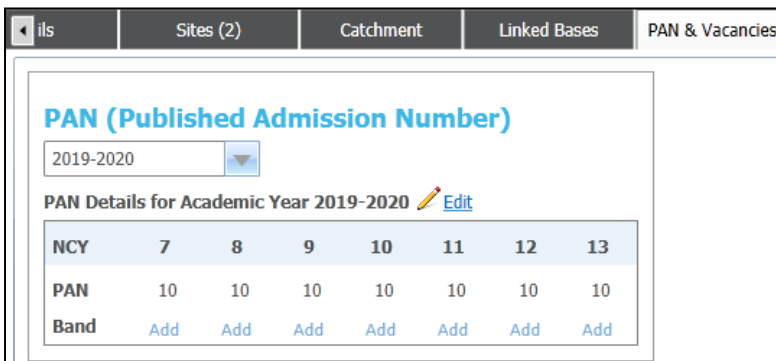
**NOTE:** If the selected base does not have any existing linked receivers, the **Add Receiver** hyperlink is displayed instead of the **Edit** hyperlink. Clicking this link displays the same fields as clicking the **Edit** link.

4. Optionally, filter the list by entering search criteria:
  - a. Enter a **Base Name or School No.**
  - b. Use the radio buttons to select whether you want to search for **Home LA** bases, **Other LA** bases or **All Bases**.
  - c. Click the **Search** button to view a list of bases that match your search criteria.
5. Select the check boxes for the receivers you wish to link and then click the **Save** button to link those receivers to the selected base.

**NOTE:** Once linked, the selected base is displayed in the receiver's **Linked Feeders** list.

## Edit PAN Details for an Academic Year

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **PAN & Vacancies** tab to view PAN details for the selected base.



3. Select the academic year that you wish to edit PAN data for from the drop-down menu. You can only edit PAN data for future academic years, and only one set of PAN data can be held per school.
4. Click the **Edit** hyperlink to view editable fields that enable you to define PAN numbers for each individual NCY.

**PAN (Published Admission Number)**

2019-2020 ▼

PAN Details for Academic Year 2019-2020 ✎ Edit

NCY	-2	-1	0	1	2	3	4	5	6	7	8
PAN	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="10"/>	<input type="text" value="10"/>
Band	Add	Add	Add	Add	Add	Add	Add	Add	Add	Add	Add

- Enter the correct PAN values into the relevant NCY fields and then click the **Save** button to save your changes.

**NOTE:** One treats receivers without a defined PAN as though there were no places available for that transfer group. It is not possible to define a zero PAN. Therefore, where there are no places available for a receiver, there is no need to record any PAN.

**IMPORTANT NOTE:** Other areas of One share the PAN functionality. As such, you must be aware of the repercussions of any changes you make to the PAN data.

## Explanation of Banding

You can use the **Bases | All Bases | PAN & Vacancies** tab to set up banding for each NCY at a school.

Banding is a way in which schools can achieve an intake that accurately reflects the range of abilities of the children who have applied to that school or group of schools. It is an oversubscription criterion and, as such, only operates when the number of applications exceeds the number of places.

A band is a grouping of students for admission prior to the use of other oversubscription criteria. For example, a partially selective school might prioritise some applications on the basis of tested ability and other applications on other criteria.

The following types of band can be used to group students:

- **Discrete:** A band with mutually exclusive criteria. For example, a Roman Catholic school might wish to admit a proportion of students on the basis of their practicing faith being Roman Catholic. As students can only be either Roman Catholic or not, this is an example of discrete banding.
- **Ability:** Enables schools to offer a number of places purely for students who are tested for a selective stream. Some students might wish to apply for this stream but also be considered as part of the greater list of applications for a place should they not be offered a place within the ability stream. Other students may simply apply for the mainstream part of the school.  
  
If the student applies for both bands then they are considered for both bands, and may get an offer in neither or one band depending upon their ranking and the band PAN.
- **Aptitude:** A school that has been awarded specialist status in up to 2 subject areas may offer up to 10% of its places to students who have an aptitude for their specialist subject(s). Some students might apply for this criterion but also wish to be considered as part of the greater list of applications for a place should they not be offered a place within the specialist criterion. Some students may simply apply for the mainstream part of the school.

- **Fair:** Fair banding is used by some comprehensive schools to try to ensure that their intake really is comprehensive and that their intake includes a proportionate spread of students of all abilities. The intake can be set up to represent the full range of abilities of applicants for the school (or group of schools), the range of abilities of children in the local area or the national range of abilities.

Fair Bands can either be equal in size (e.g. a total PAN of 100 places split into 4 bands of 25 places) or of different sizes, proportionate according to the range of abilities available.

Schools can use fair banding in one of two ways:

- **Norm Referenced Banding:** Enables schools to achieve an intake representative of the ability range of applicants. The proportion of applicants offered places from each criterion must mirror the proportion of applicants placed in each criterion.

The applicants are ranked according to their score in a common test and the criteria bands are determined by the relative performance of applicants in the test (i.e. not by absolute scores). Places are then allocated such that the proportion of applicants offered places within each band mirrors the size of the band.

As such, if a school places 25% of applicants in Band 1, 50% in Band 2 and 25% in Band 3, it must offer 25% of the places to applicants from Band 1, 50% to applicants from Band 2 and 25% to applicants from Band 3. Bands can either be equal (for example 25% for each of four bands) or proportionate, as in the example given. If proportionately sized bands are used, these should be symmetrical either side of the median to ensure that the intake is not skewed in either direction.

- **Criterion Referenced Banding:** Achieves an intake representative of the Local Authority or national ability profile.

The scores that form the boundaries of each band are determined by either the national or local ability profile (e.g. using QCA tests). Each applicant to a school, or group of schools, is placed in to the appropriate band according to their score in the relevant test. The proportion of children offered places from each band is, as far as possible, proportionate to the size of the local or national band (whichever is being used), and places must be allocated according to the school's published oversubscription criteria. If there are vacancies in a band, the remaining places should be filled by children falling into the next nearest bands.

### Example of Criterion Referenced Banding:

A school receives 200 applications and has a published admission number of 120. Results of all children who sat an ability test in a local authority show that in the local area as a whole:

- 25% of children score between 85%-100% (Band 1).
- 25% of children score between 63%-84% (Band 2).
- 25% of children score between 45%-62% (Band 3).
- 25% of children score between 0%-44% (Band 4).

All the applicants to the school are placed in to the appropriate band based on their score and 25% of children are then selected from within each band using the published oversubscription criteria. This has the effect of achieving an intake that reflects the abilities of children in the local area, as detailed in the following table.

Band	1	2	3	4
Number of applicants to the school qualifying in each band	28	42	80	50
Percentage of children locally allocated to each band	25%	25%	25%	25%
Number of places allocated using oversubscription criteria	30	30	30	30
What happens	Admit all 28 plus two from band 2	Admit 30	Admit 30	Admit 30

## Adding Bands to an NCY

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **PAN & Vacancies** tab to view PAN details for the selected base.

The screenshot shows the 'PAN & Vacancies' tab with a dropdown menu set to '2019-2020'. Below it, the text reads 'PAN Details for Academic Year 2019-2020' with an 'Edit' link. A table displays the following data:

NCY	7	8	9	10	11	12	13
PAN	10	10	10	10	10	10	10
Band	Add	Add	Add	Add	Add	Add	Add

3. Select a year from the drop-down menu to view PAN details for that particular year.
4. Click the **Add** hyperlink for the NCY whose banding you wish to define to display the **Band Details** dialog.

The screenshot shows the 'Band Details' dialog box with the following information:

- Academic Year: 2019-2020
- NCY: 7
- PAN: 10
- [Add Band](#)
- Use Banding

You can only define banding for NCYs that already have PAN details set. For more information on entering PAN details, see [Edit PAN Details for an Academic Year](#) on page 229.

5. Ensure that the **Use Banding** check box is selected and then click the **Add Band** hyperlink to view editable fields relating to band details.

6. Enter the band's **Name** and **Banding Type**. A shortened **Display Name** for the band is automatically generated.
7. Enter the band's **PAN**. The PANs of all sub-bands within a band must total the PAN of the band. The PAN of all bands must total the PAN of the base for the selected year and NCY.
8. If applicable, select a **Parent Band**.
9. If the band is to be assessed, select the **Assessed** checkbox.
10. Select the oversubscription criteria to be used for the band. You can do this in two ways:
  - To use the oversubscription criteria that have been defined for the sub group, select the **Use Sub Group Oversubscription Criteria** check box.
  - To set oversubscription criteria that are specific to the band you are setting up, enter priority numbers into the fields in the **Oversubscription Criteria** box. You can select as many oversubscription criteria as required, although they must all have different priority numbers.
11. Click the **Save** button to save your changes and add the band.

## Editing an NCY's Bands

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **PAN & Vacancies** tab to view PAN details for the selected base.
3. Select a year from the drop-down menu to view PAN details for that particular year.
4. Click the **Edit** button to view a list of

## Set Vacancy Details

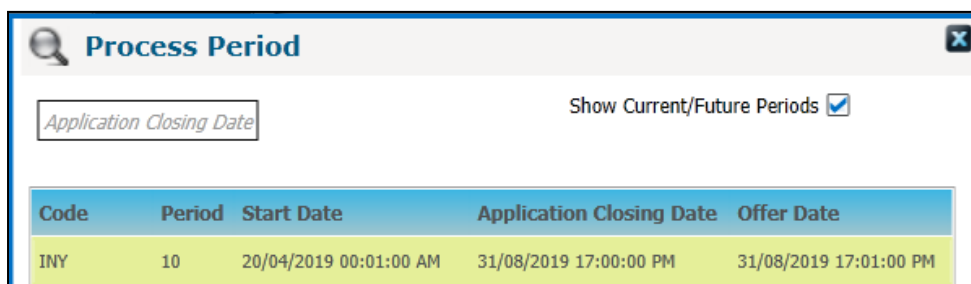
The **Vacancies** section of the **PAN & Vacancies** tab shows current vacancy details for the selected process period and base. It should be updated as vacancies arise throughout the year.

1. Select a base. For more information on selecting bases, see [Selecting a Base](#) on page 219.
2. Select the **PAN & Vacancies** tab to display editable fields relating to vacancy details.

## Managing Bases



3. Click the **Vacancies** browse to display the **Process Period** dialog.



4. Highlight the process period you wish to define vacancies for and then click the **Select** button to select that period and close the dialog.

**NOTE:** By default, One only displays current and future process period in the **Process Period** dialog. To view process periods whose offer date is in the past, de-select the **Show Current/Future Period** check box. Vacancy details for past process periods can be viewed, but not edited.

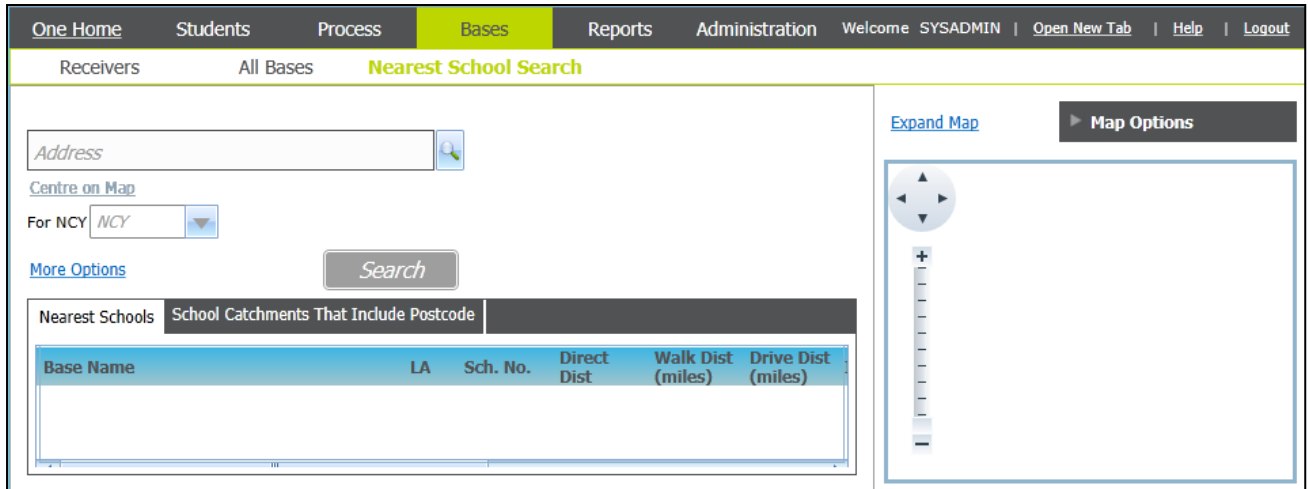
5. Enter the appropriate vacancy numbers for each NCY and then click the **Save** button to return to the **PAN & Vacancies** tab with vacancy numbers displayed. One uses the following rules when managing vacancy numbers:
  - Any NCYs without a vacancy number are assumed to have zero vacancies for that process period. When the offer routines are run, no students are allocated for these NCYs.
  - When vacancy data has been entered and saved for a process period, only the NCYs for which vacancies have been added are displayed. Click the **Edit** hyperlink to add vacancies for other NCYs.

**NOTE:** Once you have define vacancy numbers for a process period, those numbers are displayed underneath the **Vacancies** browse. If you wish to edit previously-defined vacancy numbers, click the **Edit** hyperlink.

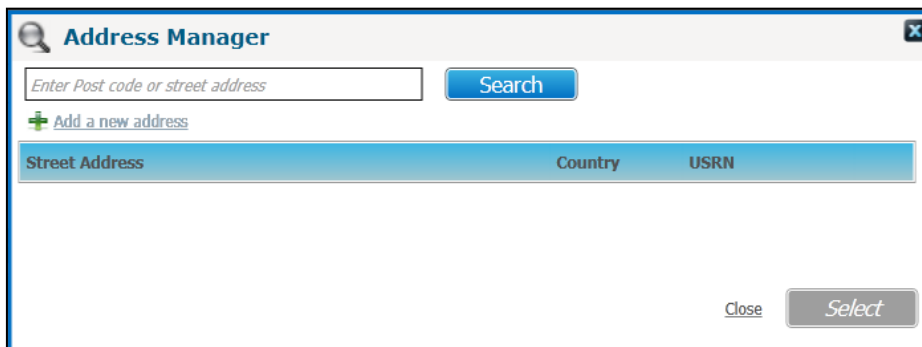
If your Local Authority only defines one process period for an academic year, then you must overwrite your vacancy information for each new process period. Only one set of vacancy information can be logged for a given process period. As such, the historical record does not show a breakdown of vacancy data, (as this data changes throughout the year) instead only showing the latest data entered for each academic year.

## Viewing the Nearest Schools to an Address

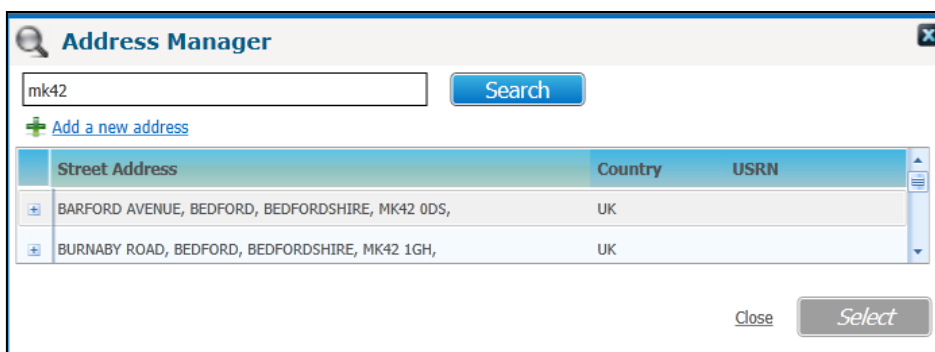
1. Select **Bases | Nearest School Search** to display the **Nearest School Search** page.



2. Select an address from the browse at the top of the page:
  - a. Click the **Select Current Address** browse to display the **Address Manager** dialog.

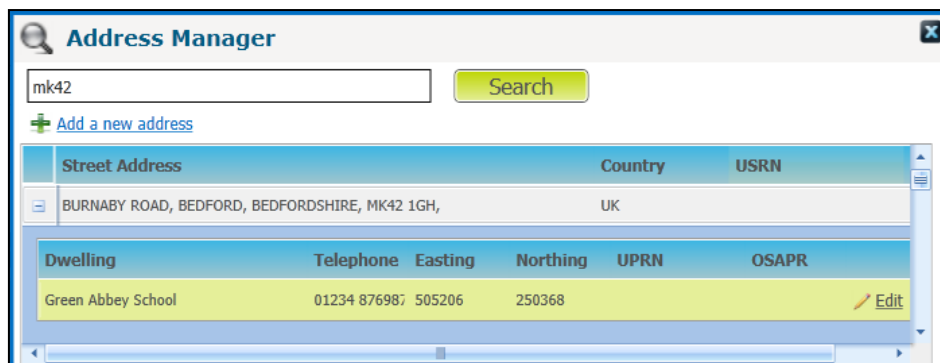


- b. Enter at least two characters of a postcode or address into the **Enter Post code or street address** field.
- c. Click the **Search** button to display a list of streets that match your search criteria.



- d. Select the required street to view a list of the dwellings located on that street.

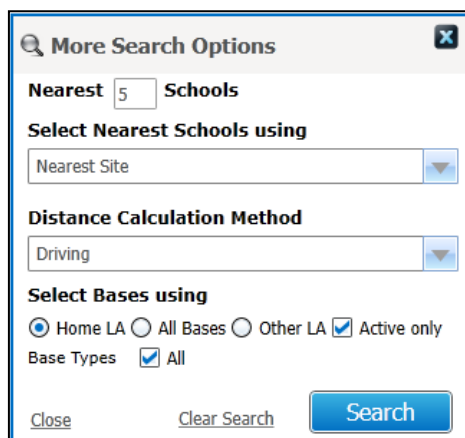




e. Highlight a dwelling and then click the **Select** button to select that address.

**NOTE:** If you cannot find the address you need, you can click the [Add a new address](#) hyperlink to add the address to the catalogue. For more information on adding addresses to the catalogue, see [Adding an Address to the Address Catalogue](#) on page 238.

3. Select an NCY from the **For NCY** menu. Only schools catering to the selected NCY are displayed.
4. Optionally, configure additional search options:
  - a. Click the **More Options** hyperlink to display the **More Search Options** dialog.



- b. Enter the number of schools you wish to view into the **Nearest Schools** field.
  - c. Select a measurement point for the schools from the **Select Nearest Schools** using menu.
  - d. Select a distance calculation method from the **Distance Calculation Method** menu.
  - e. Use the **Select Bases using** radio buttons to select whether you want to view **Home LA** bases, **Other LA** bases, or **All Bases**.
  - f. Select whether you want to view **All bases** or only **Active bases** from the **Base types** field.
5. Click the **Search** button to display a list of the nearest schools that match your search criteria. The locations of the schools are displayed on the map in the right-hand panel.

One Home Students Process **Bases** Reports Welcome SYSADMIN | Logout

Receivers All Bases **Nearest School Search**

Railway Station, Ashburnham Road, Bedford, M

Centre on Map

For NCY

More Options

Show All

5 Bases selected using "NCY-All, Nearest Gate or Site, Direct, Home LA, Active Bases,

Nearest Schools **School Catchments That Include Postcode (0)**

Base Name	LA	Sch. No.	Direct Dist (miles)	Wal (mi)
<input checked="" type="checkbox"/> Prioxy Primary School (p4t)	820	2043	0	0
<input checked="" type="checkbox"/> ITGBase1	820	0001	0.573	0.88

Expand Map

6. Optionally, use the **Map Options** tab to display safe walking and driving routes form the address to each school:
  - a. Use the check boxes in the list of schools to select the school that you wish to display on the map. To display all search results on the map, select the **Show All** check box.
  - b. Click the **Map Options** hyperlink to view check boxes for walking and driving routes.

**Map Options**

Show walking routes

Show driving routes

- c. Select the **Show walking routes** and **Show driving routes** check boxes as required to display routes from the address to the selected schools on the map.
7. If the selected address is within the catchment areas of any schools then a number is displayed on the **School Catchments That Include Postcode** tab. Click this tab to display a list of schools whose catchment areas the address is in.

Nearest Schools **School Catchments That Include Postcode (2)**

Base Name	LA	Sch. No.	Direct Dist (miles)	Gender	Control	Teach Medium	Lower NCY	Upper NCY
John Bunyan Specialist Science School	820	4013	2.618	Co-Ed	LEA Controlled		6	13
Mark Rutherford Secondary School	820	4017	1.345	Co-Ed	Community		6	11

## Adding an Address to the Address Catalogue

1. Open an **Address Manager** dialog. These dialogs are used for address selection throughout A&T Back Office.

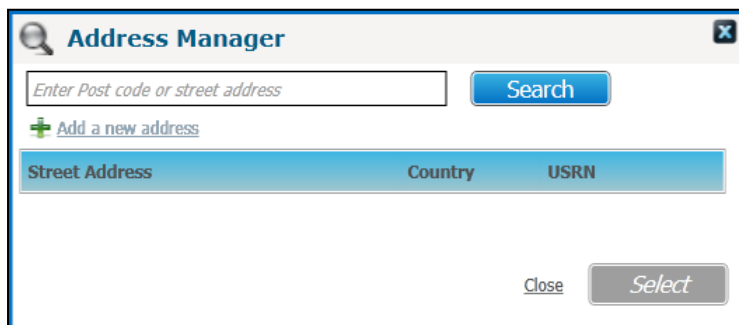
2. Enter a postcode into the **Enter Post Code or Street Address** field and then click the **Search** button. A list of current streets matching that postcode is displayed.

3. Click the **Add a New Address** hyperlink to display editable fields relating to address details.

4. Enter the **Postcode** of the address
5. Fill out the rest of the address fields as required. **Postcode** is the only required field.
6. Click the **Save** button to save the new address. The new address is now selectable in all **Address Manager** dialogs within A&T Back Office.

## Editing an Address in the Address Catalogue

1. Open an **Address Manager** dialog. These dialogs are used for address selection throughout A&T Back Office.



2. Enter a postcode into the **Enter Post Code** or **Street Address** field and then click the **Search** button. A list of streets matching that postcode is displayed.



3. Select a street to see a list of dwellings on that street.



4. Click a dwelling's **Edit** hyperlink to view editable fields relating to that address.

**Address Manager**

Address Details

Flat Name	Building Name
14	
Adams Close	Kempston
District/Village	Bedford
County	MK42 7JE
UK - United Kingdom	LA
USRN	UPRN
OSAPR	
503350	247150

[View On Map](#)

5. Make your changes. All fields except **Postcode** are optional.
6. Click the **Save** button to save your changes.

## Copying PAN and Banding Data between Years

The **Administration | Bases | Copy PAN** tab enables you to copy PAN and Band details from a selected year to the following year. When copied, the PAN data is transferred to the next NCY (i.e. the PAN for NCY 7 becomes the PAN for NCY 8 in the following year, 8 becomes 9, and so on). The last PAN is omitted and the first PAN is taken from the Copy From year.

Band details are only copied if the NCYs match. For example:

A school has banding set up for 2011/2012 as follows:

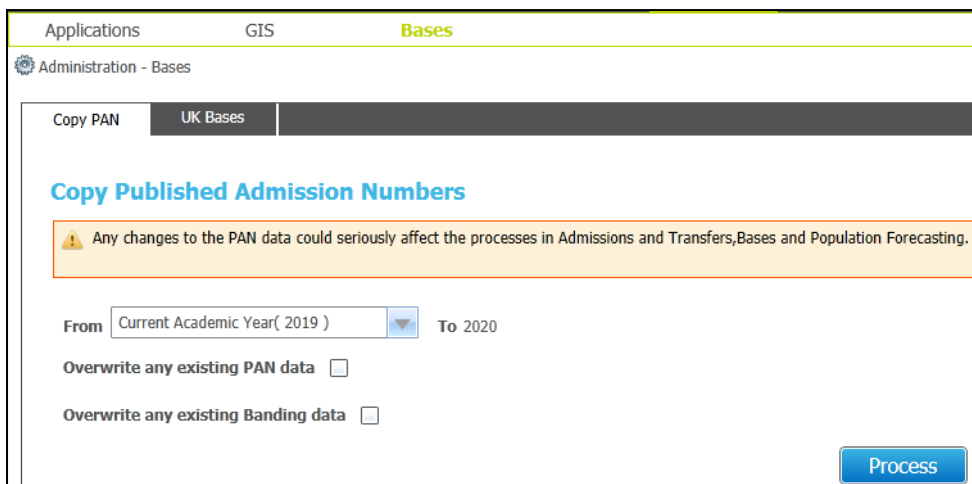
- **NCYs -2 to 6:** PAN is not defined.
- **NCY 7:** PAN 100 – 4 fair bands with 25 places each.
- **NCY 8:** PAN 102.
- **NCY 9:** PAN 101.

When this is copied into 2012/2013 the following applies:

- **NCY 7:** The NCY for 6 in 2011/2012 was not defined (or is 0) so the NCY is copied from the matching NCY 7 in 2011/2012 (PAN 100). Since this is the matching NCY and band details are present then the band details are also copied.
- **NCY 8:** Copied from 2011/2012 NCY 7 (PAN 100). Since this is not the NCY that is being copied from, then the band details are not copied.
- **NCY 9:** Copied from 2011/2012 NCY 8 (PAN 102).
- **NCY 10:** Copied from 2011/2012 NCY 9 (PAN 101).

To copy PAN and banding data:

1. Select **Administration | Bases | Copy PAN** to display the **Copy Published Admission Numbers** tab.



2. Select the academic year that you want to copy from using the drop-down menu. You can select from the previous, current or next academic year.
3. If you wish to overwrite existing PAN and / or banding data, select the **Overwrite any existing PAN data** and **Overwrite any existing Banding data** check boxes respectively.  
If you do not opt to overwrite data, then only blank records are processed; any records with pre-existing data are skipped.
4. Click the **Process** button to copy the data.

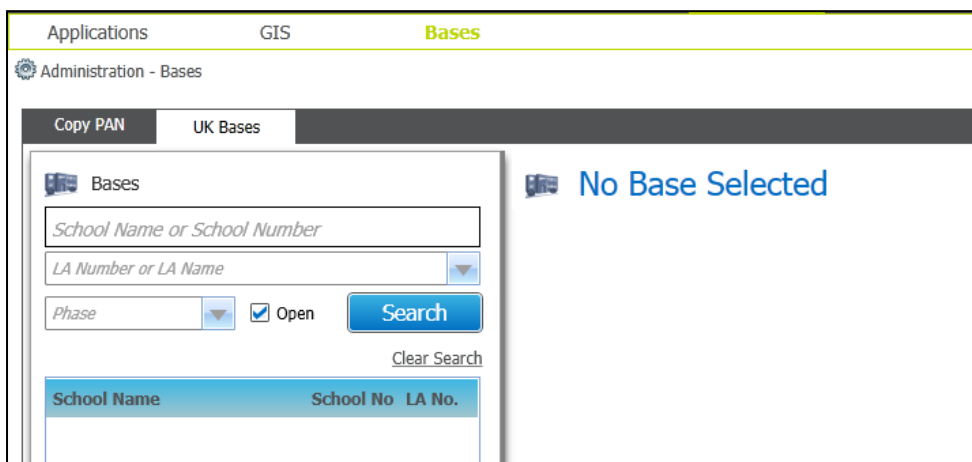
**IMPORTANT NOTE:** The PAN data is shared by Admissions and Transfers, Bases and Population Forecasting. You must be aware of the repercussions of any changes you make to the PAN data.

## Editing the UK Bases Table



The **Administration | Bases | UK Bases** tab enables you to edit the bases in the UK\_BASES table. This makes it possible to keep your database up-to-date prior to the next release.

The National Database is populated during the One installation with an updated list of English schools. The table is overwritten with each upgrade and updated once a year with a refreshed database sourced from national bodies.



1. Select **Administration | Bases | UK Bases** to view search fields related to the UK\_BASES table.



2. Optionally, enter search criteria into the fields on the left-hand panel.
3. Click the **Search** button to view a list of bases that match your search criteria.

 <b>Barking and Dagenham College</b> 301 - 8000		 <a href="#">Edit UK Base</a>
Phase: 6 - 16 Plus	Open/Closed Status: 1 - Open	URN: 130424
Lower Age: 16	Upper Age: 99	Locale: 1
Principal Site Address: Dagenham Road,,Rush Green,Romford,Essex,RM7 0XU		Gender: CoEd Retain Details: No

- Highlight a base and then click the **Edit UK Base** hyperlink to make that base's details editable.

 Barking and Dagenham College	8000	-	301-Barking	
6 - 16 Plus	1 - Open	130424	Co-Ed	Retain Details: <input type="checkbox"/>
16	99	1 - England/Other		
Dagenham Road,,Rush Green,Romford,Essex,RM7 0XU				
				Cancel <input type="button" value="Save"/>

- Make the required changes. **Base Name**, **School No.** and **LA No.** are required fields, while all other fields are optional.
- Select the **Retain Details** check box.

**NOTE:** The **Retain Details** check box prevents your edited details from being overwritten when the next UK\_BASES update is made.

You must select this check box in order to save your data. If you want your changes to be overwritten at the next main UK\_BASES update, edit the record again and de-select the **Retain Details** box without making any other changes to the base's data.

- Click the **Save** button to save your changes.





## Configuring GIS Parameters

The **Administration | GIS** page enables you to define how distances are calculated with A&T Back Office in order to conform to your Local Authority's policies.

The parameters defined on this page are used during the admissions processes when **Distance from Home** is a selection criterion, for pre-processing by direct distances and also for Transport assessments.

## Configuring Distance Calculations

- Select **Administration | GIS** to display the **GIS Parameters** page.

Applications	<b>GIS</b>	Bases
Administration GIS		
GIS Parameters		
▶ <a href="#">Distance Calculations</a> 		
▶ <a href="#">Nearest Schools Search</a> 		
▶ <a href="#">Ordnance Survey Licence Key</a> 		
▶ <a href="#">Unlock Routines</a> 		

- Open the **Distance Calculations** section and then click the **Edit** hyperlink to view editable fields relating to distance processing.

**Distance Calculations**

Nearest Point On Base Selected Using :

Distances Calculated Using :

Include Off Road Distance In Walking Distance Calculation :

Include Off Road Distance In Driving Distance Calculation :

Walk to driving route :

3. Select the point of each base that you wish to measure distance from using the **Nearest Point On Base Selected Using** drop-down menu.
4. Select whether you wish to use **Walking, Driving** or **Direct** distances in calculations using the **Distances Calculated Using** menu.

**NOTE:** There must be a safe walking routes network map for the Local Authority area within the GIS utility in order for you to use **Walking** distances.

5. If you wish to **Include Off Road Distance in Walking Distance Calculations**, select the check box.
6. If you wish to **Include Off Road Distance in Driving Distance Calculations**, select the check box.
7. If you wish for One to calculate driving distances when a particular address is closer to a footpath than a road, select the **Walk to driving route** check box. If this check box is not selected, then all driving distance calculations for addresses which are closer to a footpath than a road must be made manually.

**IMPORTANT NOTE:** If a particular address is closer to a footpath than a road, the nearest road may not necessarily be a valid starting point for a driving distance calculation. The **Walk to driving route function** is used at your LA's own risk.

See the *Configuring Distance Calculation* section of the *Transport Back Office* handbook for more information on how One behaves when Walk to driving route is selected.

8. Click the **Save** button to save your changes.

## Configuring Nearest Schools Search

1. Select **Administration | GIS** to display the **GIS Parameters** page.
2. Open the **Nearest Schools Search** section and then click the **Edit** hyperlink to view the **Number of Schools Returned** field.

**Nearest Schools Search**

Number of Schools Returned :

3. Enter the number of schools that you wish the **Nearest Schools** search to return.
4. Click the **Save** button to save your changes.



## Entering the Ordnance Survey Licence Key

1. Select **Administration | GIS** to display the **GIS Parameters** page.
2. Open the **Ordnance Survey Licence Key** section and then click the **Edit** hyperlink to display the **Ordnance Survey Licence Key** field.

3. Enter the key and then click the **Save** button to save your changes.

## Unlocking Routines

While one of the bulk preferences routines is being run it is very important that another user does not start another routine of the same type within the same transfer group. There are two types of bulk preference routine: **Distance** (i.e. GIS Routes and Distances and Direct Distances) and **Catchment** (i.e. GIS Catchment and Postcode Catchment).

Routines are locked for a particular transfer group when a user starts another routine of the same type. When a routine is locked, the **Pre-Process** and **Process** link and button (in the **Pre-Offer Processing** section of the **Process | Transfer Groups | Students** tab) are disabled.

You can use the **Unlock Routines** section of the GIS Parameters screen to view current locked routines, and unlock routines if necessary.

**IMPORTANT NOTE:** *Unlocking bulk routines while they are running can result in corrupted or lost data. It is recommended that you only use the Unlock Routines process to cancel routines that have stopped unexpectedly (for example, in the event of a server failure).*

1. Select **Administration | GIS** to display the **GIS Parameters** page.
2. Open the **Unlock Routines** section to view a list of currently locked routines and their associated transfer groups.

TG Name	Start Date	Process Type	Lock Status	Lock Time	Unlock Routines
---------	------------	--------------	-------------	-----------	-----------------

3. Click a routine's **Unlock Routine** hyperlink. A confirmation dialog is displayed.
4. Click the **Yes** button to unlock the routine.

# 09 | Managing Reports

This chapter covers report management.

## Selecting Reports

1. Select **Reports | All Reports** to display the **All Reports** screen.

The screenshot shows the 'All Reports' interface. On the left, there is a search section with a 'Report Title' field containing 'Admissions and Transfers', a 'Search' button, and a 'Clear Search' link. Below the search, it indicates '1 report(s) returned for 'Admissions and Transfers' process' and shows a table with one report: 'ATT2 - Registration Cert Individual' uploaded on '15/07/2013 16:02'. On the right, the details for the selected report are shown, including the process name 'Admissions and Transfers', the last upload time '15/07/2013 16:02', and a 'Run Report' button.

2. If required, enter a **Report Title** into the search field in the left-hand column.
3. If required, select the process that the report applies to:
  - a. Click the browse button next to the **Select Process** field to display the **Select Process** dialog. A list of available processes is displayed.

The screenshot shows the 'Select Process' dialog box. It has a search field labeled 'Select Process' and a list of processes below it. The process 'Admissions and Transfers' is highlighted in blue.

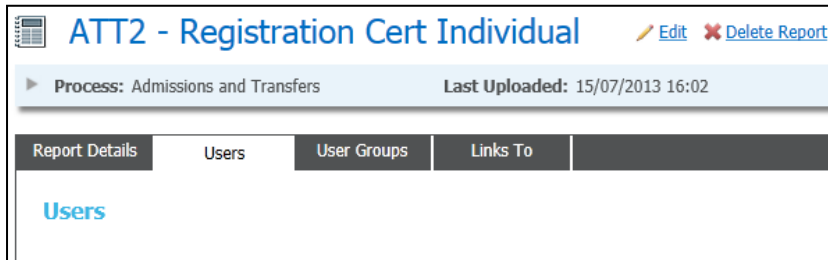
- b. If required, enter a process name into the **Select Process** field to filter the list.
  - c. Highlight a process and then click the **Select** button to select that process and close the dialog.
4. Click the **Search** button to display a list of all reports that meet your search criteria. If you did not enter any criteria, then the list displays all reports.

This screenshot is identical to the one above, showing the 'All Reports' screen with the search results for 'Admissions and Transfers' and the details for the 'ATT2 - Registration Cert Individual' report.

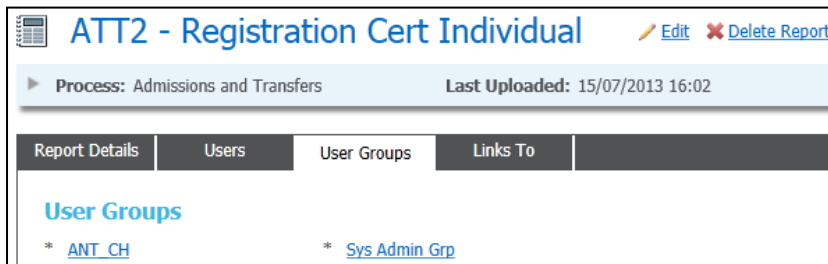
5. Highlight a report to select it.

## Viewing a Report's Users and Groups

1. Select a report. For more information on selecting reports, see [Selecting Reports](#) on page 245.
2. To view a list of the selected report's users, select the **Users** tab.



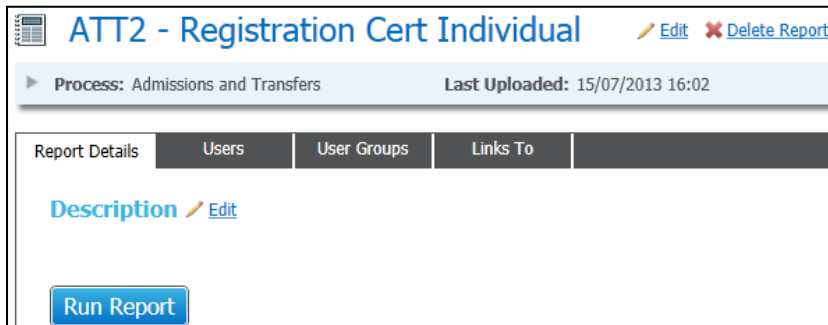
3. To view a list of the selected report's user groups, select the **User Groups** tab.



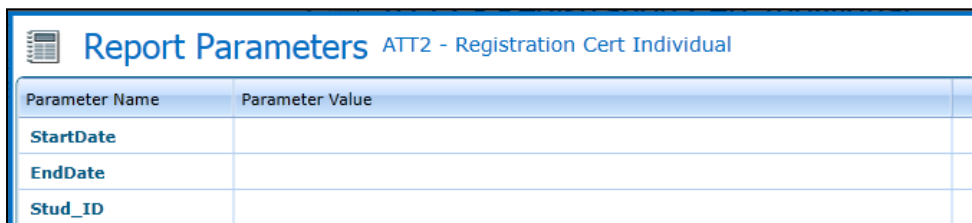
**NOTE:** You can view a dialog listing the active users within each group by opening the **User Groups** tab and clicking on a particular group name.

## Running Reports

1. Select a report. For more information on selecting reports, see [Selecting Reports](#) on page 245.
2. Ensure that the **Report Details** tab is selected and then click the **Run Report** button.



3. If the report contains multiple parameters (i.e. parameters other than the one passed from the screen) then the **Report Parameters** dialog is displayed.



Enter the desired parameters and then click the **Submit Report** button to close the dialog.

The submitted report can be viewed from the **Submitted Reports** page. For more information on this process, see [Viewing Submitted Reports](#) on page 252.

## Adding Reports

1. Select **Reports | All Reports** to display the **Reports** page.

The screenshot shows the 'All Reports' page with the following elements:

- Page title: **All Reports** Submitted Reports
- Section: **Reports**
- Form fields: **Report Title** (text input), **Select Process** (dropdown menu)
- Buttons: **Clear Search**, **Search**
- Link: **+ Add new report**
- Message: **No report(s) returned for 'unknown' process**
- Table header: **Report Title**, **Last Uploaded**

2. Click the **Add new report** hyperlink to display editable fields relating to report details.

The screenshot shows the report details form with the following elements:

- Form field: **Report Title** (text input)
- Dropdown menu: **Admissions and Transfers**
- Text: **Last Uploaded: -**
- Form field: **File Name** (text input)
- Text: **Upload new Report ID: -**
- Checkboxes: **Data Shielding:** , **Linked report:**
- Buttons: **Cancel**, **Save**

3. Enter a **Report Title**.
4. Select the process that the report relates to:
  - a. Click the **Process** browse to display the **Select Process** dialog.

The screenshot shows the 'Select Process' dialog box with the following elements:

- Section: **Select Process**
- Form field: **Select Process** (text input)
- Table header: **Process Name**
- Table row: **Admissions and Transfers**

- b. Optionally, filter the list of processes by entering a process name into the **Select Process** field.
- c. Highlight the process you wish to select and then click the **Select** button to select that process and close the dialog.

**NOTE:** Once created, the report is placed into the folder or subfolder that corresponds to its process.

5. Select a **File Name** for the report:
  - a. Click the **Upload new report** hyperlink to display the Windows **Open** dialog
  - b. Select an .RPT file. The file's name must be unique within its subfolder.
6. If the report is to contain sensitive information, select the **Data Shielding** check box.

**NOTE:** The **Data Shielding** check box is for information purposes only and does not prevent the report from displaying sensitive information.

7. If the report is to be a linked report, select the **Linked Report** check box to include this report in **More Options | Linked Reports**. This setting enables the **Links To** tab on the report.

## Managing Reports

- Click the **Save** button to create the report. The selected .RPT file is copied to the relevant process folder on the report server and a database record is created for the report.

## Editing Reports

- Select a report. For more information on selecting reports, see [Selecting Reports](#) on page 245.
- Click the **Edit** hyperlink to the right of the report name to display editable fields relating to report details.

The screenshot shows a web interface for editing a report. At the top, there is a search bar containing 'ATT2 - Registration Cert Individual'. Below this, a dropdown menu is set to 'Process: Admissions and Transfers', with 'Last Uploaded: - 15/07/2013 16:02' displayed to the right. A text input field contains 'Att2 - registration certificate individ.'. To the right of this field is a blue 'Upload new report' hyperlink and the text 'Report ID: - 12'. Below the input field, there are two checkboxes: 'Data Shielding: ' and 'Linked report: '. At the bottom right, there are 'Cancel' and 'Save' buttons.

- If required, you can upload a new report file by clicking the **Upload new report** hyperlink and then selecting a file using the Windows **Open** dialog. New report files must meet the following conditions:

- The file must have a format of \*.rpt.
- The filename must be unique within a subfolder.

If the filename already exists in the folder, then the newly added file name is appended with a number that increments by one each time a file of the same name is added (e.g. Report.rpt, Report\_2.rpt, Report\_3.rpt).

- If the report contains sensitive information, select the **Data Shielding** check box.

**NOTE:** The **Data Shielding** check box is for information purposes only and does not prevent the report from displaying that information.

- If the report is a linked report, select the **Linked** check box.

**NOTE:** Linked reports must be linked to screens using the **Links To** tab. For more information about setting up linked reports, see [Linking Reports](#) on page 249.

- Click the **Save** button to save your changes.
- If required, add a new description for the report:
  - Select the **Report Details** tab to display the **Description** field.

The screenshot shows the 'Report Details' tab for the report 'ATT2 - Registration Cert Individual'. At the top right, there are 'Edit' and 'Delete Report' hyperlinks. The main content area displays the following information: 'Process: Admissions and Transfers' with 'Last Uploaded: 15/07/2013 16:02' to the right; 'Filename: Att2 - registration certificate individual.rpt' with 'Report ID: 12' to the right; and 'Data Shielding: No' with 'Linked report: Yes' to the right. A 'Hide' link is visible at the bottom right of this section. Below this is a tabbed interface with 'Report Details' selected, and other tabs for 'Users', 'User Groups', and 'Links To'. Under the 'Report Details' tab, there is a 'Description' field with an 'Edit' hyperlink.

- Click the **Edit** hyperlink to display a text box.

- c. Enter the description as required and then click the **Save** button to save your changes.

## Deleting Reports

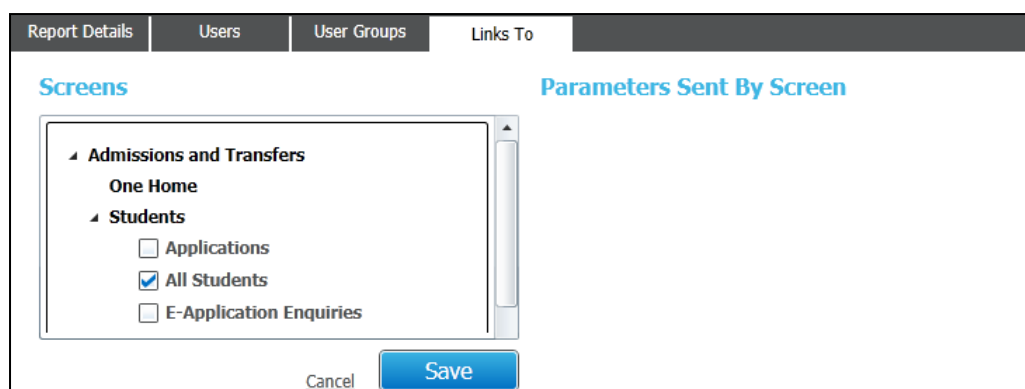
1. Select a report. For more information on selecting reports, see [Selecting Reports](#) on page 245.
2. Click the **Delete Report** hyperlink. A confirmation dialog is displayed.

3. Click the **Yes** button to delete the report. Any links associated with the report are also deleted.

## Linking Reports

1. Select a report. For more information on selecting reports, see [Selecting Reports](#) on page 245.
2. Ensure that the **Linked** check box is selected for the report. For more information on selecting the **Linked report** check box, see [Editing Reports](#) on page 248.
3. Select the **Links To** tab to display a list of pages that the report can be linked to and to view the report parameters sent by each screen.

4. Click the **Edit** hyperlink to make the list editable.



5. Use the check boxes to select the pages that you wish to link the report to. Any check boxes for pages that cannot be linked to are greyed out. The default parameters sent by each screen are displayed on the right-hand side as the screens are selected.
6. Click the **Save** button to save your changes. The report now appears in the **Linked Reports** page, which is accessible from the **More Options** menu of the screen or screens that you linked the report to.

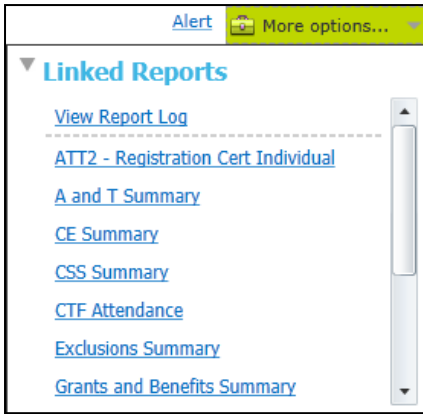
## Running Linked Reports

A linked report can be configured to accept a default parameter, sent from the screen on which it is run. If no other parameters are present, the report runs without prompting for additional parameters.

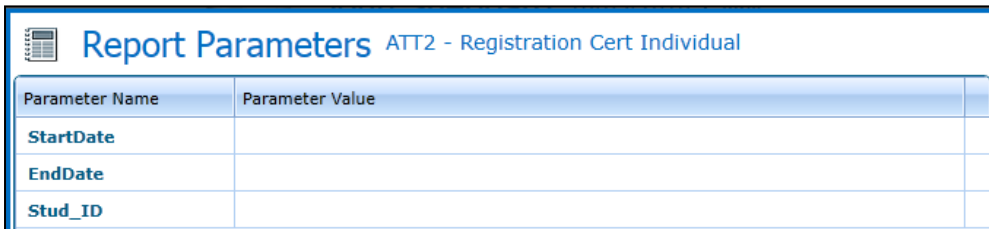
If the report contains multiple parameters, users will be asked to select parameter values in the **Report Parameters** modal window when they run the report. All the parameters are editable, including the default.

When users run a report, they can choose to include it in the **Report Log**. If they choose to include the report in the log, an entry in the Report Log is created for that entity (**Base, Student, Transfer Group, Appeal** etc.). The log entry stores a link to the report file and the parameters supplied to the report at the time it was run. This entry is visible to all users who have access to that entity and to linked reports, and it is accessible by clicking the **View Report Log** link at the top of the list of linked reports.

1. Navigate to the page that the report is linked to. Linked reports are currently available from the following pages:
  - **Student | Applications**
  - **Student | All Students**
  - **Process | Transfer Groups**
  - **Process | Appeals**
  - **Bases | Receivers**
  - **Bases | All Bases**
2. Click the **More Options** button to display the **More Options** menu. Click **Linked Reports** to display a list of all reports.



3. Select the report that you wish to run from the menu.
4. If the report contains multiple parameters (i.e. parameters other than the one passed from the screen) then the **Report Parameters** dialog is displayed.



Enter the desired parameters and then click the **Submit Report** button to close the dialog. A prompt asking whether you wish to log the report is displayed.

5. Click **Yes** if you wish to log the report, or **No** if you do not. The report displays in a Crystal Reports Viewer window.

**NOTE:** *Linked reports are not sent to **Reports | Submitted Reports**, and are not retained for future viewing by the logged on user.*

## Viewing the Linked Report Log

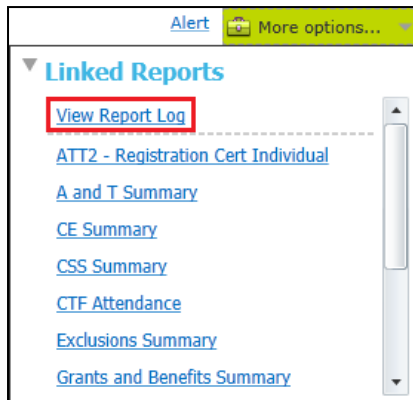
Every time a linked report is run, you are given the option to log that report. Logging a linked report creates an entry in the Report Log for that entity (Student, Transfer Group, Base, Appeal etc.), storing a link to the report file and recording the parameters supplied to the report at the time it was run.

Report logs can be viewed by all users who have access to both Linked Reports and the entities that those particular reports are linked to.

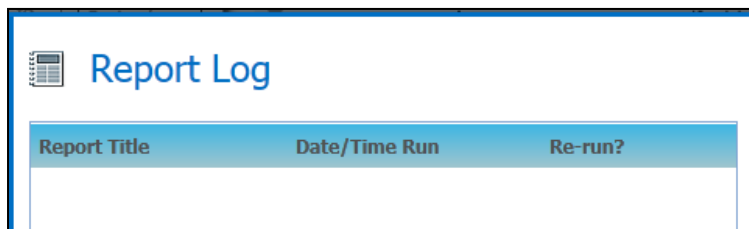
1. Navigate to a page that supports linked reports. Linked reports are currently available from the following pages:
  - **Student | Applications**
  - **Student | All Students**
  - **Process | Transfer Groups**
  - **Process | Appeals**
  - **Bases | Receivers**
  - **Bases | All Bases**
2. Click the **More Options** button to display the **More Options** menu.



## Managing Reports



3. Click **View Report Log** to display the **Report Log** dialog.



**NOTE:** If you wish to re-run a linked report, click that report's **Re-Run** icon. A .PDF copy of the re-run report is added to the entity's **Linked Documents** menu

If you wish to delete a logged report, click that report's **Delete** icon. Deleted reports are no longer visible and cannot be re-run. Also, the database entries which store the report parameters are removed. However, deleting a report log entry does not delete the .PDF copy of the report output stored in the entity's **Linked Documents** list.

## Viewing Submitted Reports



1. Select **Reports | Submitted Reports** to view a list of all reports run from your user account across all v4 Client and v4 Online modules.

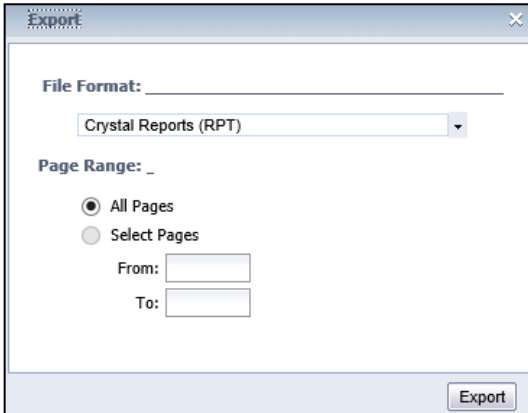
Report Title	Submitted On	Start Time	Report Status
B2b_RejectionsReport	23/04/2019 09:49		Completed
B2b_ExceptionsReport	23/04/2019 09:01		Completed

2. Click a report's **View Report** button to open that report in the Crystal Report Viewer. You can only open completed reports.



3. If required, you can export or print the selected report.

- To print the report, click the  button. The Windows **Print** dialog is displayed.
- To export the report:
  - i. Click the  button. The **Export** dialog is displayed.



- ii. Select a **File Format** from the drop-down menu.
- iii. If you only wish to export certain pages of a report, select the **Select Pages** radio button and enter your page range into the **From** and **To** fields.  
Otherwise, select the **All Pages** radio button.
- iv. Click the **Export** button to export the report.

**NOTE:** To delete a report, click that report's **Delete** button in the **Reports | Submitted Reports** screen. Deleting a report in this way removes the user's stored copy from **My Submitted Reports** in all One v4 modules, but not the definition that the report was run from.

# 10 | Administration

## Editing Online Parameters

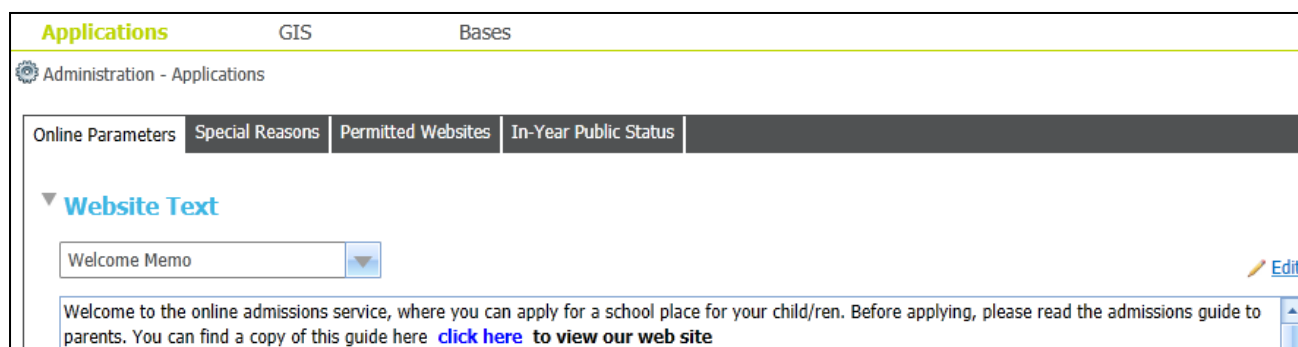
The **Administration | Applications | Online Parameters** page enables you to customise the information presented to online applicants and ensure that One imports online data correctly.

**NOTE:** Any URLs used in the memo fields must be entered on the **Permitted Websites** tab. For more information on entering permitted websites, see [Configuring Permitted Websites](#) on page 266.

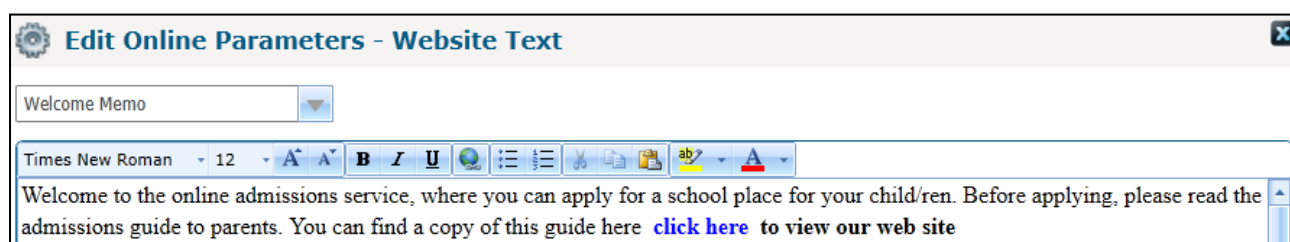
### Setting Website Text

This section of the **Administration | Application | Online Parameters** tab enables you to enter web text in order to assist applicants using A&T Online. The text is displayed on the website at particular points during the application process.

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.



2. Within the **Website Text** section, click the **Edit** hyperlink to display the **Edit Online Parameters** dialog.



3. Select the text item that you wish to edit from the drop-down menu. The following text items are available:
  - **Application Information Memo:** Displayed at the top of the home page. Can be used to help applicants decide whether they should make an application or view existing applications, and remind applicants to resubmit edited or viewed applications.
  - **Contact Us:** Displays contact details for the admissions team.
  - **Data Protection Memo:** Displays after an applicant has submitted their application. Should display your Local Authority's statement of compliance with the Data Protection Act, how personal information is used and your LA's policy on information sharing, etc.  
Applicants must confirm that they have read the Terms & Conditions and Data Protection statement before the application can be submitted.

- **Post Code Check Supporting Text:** The supporting text that appears above the postcode check field on the application form.
- **Preference Memo:** Displayed at the top of the **Preference School Search** screen. Should give the parents brief information about how they record their preferences, how many schools they can choose etc.

This memo can also be used to explain to the applicants why they might need to enter reasons for their preferences. For example, you might include the line "If your child has a special reason that needs to be considered while assessing the application, please provide more details."

The instructions under the **Find a School** heading are hard coded, so you do not need to use the **Preference Memo** to explain how to use the search screen to applicants.

- **Privacy Policy:** Admissions and Transfers Online uses cookies for site customisation. Companies in the EU using cookies must comply with the Privacy and Electronic Communications (EC Directive) Regulations 2003 by providing a privacy policy that explains how those cookies are used.

This memo contains a default statement, which complies with the cookie directive. If require, you can replace this text with your own privacy/cookie legal statement.

**IMPORTANT NOTE:** Local Authorities that host Admissions Online are fully responsible for their own privacy/cookie legal statement.

- **Public Care Question:** Used to specify the text that asks parents whether the child has ever been in care or a looked-after child. Welsh Local Authorities can record this memo in both English and Welsh.

The **Public Care Question** is empty by default. If your Local Authority does not record any text in this memo area, then the following hard-coded wording (or a Welsh language equivalent where applicable) is displayed on the Online form:

Is your child registered as being in the care of a Local Authority e.g. are they fostered or a 'Looked After' child?

- **Service Family Supporting Text:** The supporting text that appears above the 'Is your child part of a Service or Crown Servant family?' question.
- **SEN Statement/EHCP Question:** Enables you to alter the text of the 'Does your child have a Statement of Special Educational Needs?' question that appears on the Child Details page.
- **Terms & Conditions Memo:** Displayed after a parent has decided to continue to submit their application. Should be used to enter the legal terms and conditions that are displayed on the **Submit Application** page.

Terms and conditions are also displayed when a parent selects the **Terms & Conditions** link, which is available at the foot of each Admissions Online page.

- **Welcome Memo:** The text on the initial A&T Online login screen. Note that the 'Welcome to School Admissions Online' heading at the top of this screen is hard coded, so you may choose not to repeat similar text in this memo.

4. Make any necessary edits to the text and then click the **Save** button to save your changes.

## Configuring Blank Application Form and Education Website URLs

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
2. Open the **URLs** section to display the following fields:
  - **Application Forms URL:** Used to link to a page from which applicants can download blank application forms for admission to schools. The URL must begin with *https:*, *http:* or *ftp:*.  
Once entered, users can access this link via the **Application Forms** link at the bottom of public facing Admissions and Transfers Online pages.
  - **Education Websites URL:** Used when your Local Authority has created a page with links to external education websites such as EduBase and Ofsted on its web server. The URL must begin with *https:* or *http:* in order to be valid.  
Once entered, users can access this link via the **Links to Education Websites** link at the bottom of public facing Admissions and Transfers Online pages.
3. Click the **Edit** hyperlink to make the URL fields editable.

The screenshot shows the 'Administration - Applications' page. At the top, there are tabs for 'Applications', 'GIS', and 'Bases'. Below the tabs, there are sub-tabs for 'Online Parameters', 'Special Reasons', 'Permitted Websites', and 'In-Year Public Status'. The 'Online Parameters' sub-tab is active. Underneath, there is a 'Website Text' section and a 'URLs' section. The 'URLs' section is expanded, showing two input fields, each containing the text 'http://localhost'. An 'Edit' link is visible next to the 'URLs' section header.

4. Enter the required URLs and then click the **Save** button to confirm your changes.

## Setting E-Application Data Processing Rules

The **Administration | Applications | Online Parameters | Data Processing Rules** section enables you to specify how you wish One to treat import data when an incoming student has other active records within the One database (e.g. active special needs records).

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
2. Open the **Data Processing Rules** section to display the following fields:
  - **Address(Student, Sibling, Application):** Specifies how One reacts if an incoming student / applicant / sibling address does not match with the existing One address.
  - **Suspend Conflicts for:** Contains a checklist of student groups. One puts records for students who are members of selected groups into suspense if conflicting data is imported for those students.
3. Click the **Edit** hyperlink to make the **Address(Student, Sibling, Application)** and **Suspend Conflicts for** fields editable.

Applications	GIS	Bases
Administration - Applications		
Online Parameters	Special Reasons	Permitted Websites
In-Year Public Status		
<b>Data Processing Rules</b> <a href="#">Edit</a>		
e-Applications:		
Address(Student, Sibling, Application):	<input type="radio"/> Always Import <input type="radio"/> Always put in Conflict <input checked="" type="radio"/> Import if null, else put in Conflict <input type="radio"/> Don't Import	
Suspend Conflicts for:	<input type="checkbox"/> Active A&T Students <input type="checkbox"/> Active Children in Employment <input type="checkbox"/> Active G&B Students <input type="checkbox"/> Active SEN Students <input type="checkbox"/> Active Transport Students	

- Select the required option from the **Address(Student, Sibling, Application)** field. The available options are:
  - **Always Import:** Data is always imported, overwriting One data when the incoming data is different.
  - **Always put in Conflict:** Incoming data is put into suspense if it is different to the existing One data.
  - **Import if null, else put in Conflict:** Data is only imported if the existing One field is blank. Otherwise, it is put into suspense.
  - **Don't Import:** Conflicting data is never imported.
- If required, select student groups from the **Suspend Conflicts for** field.
- Click the **Save** button to save your changes.

**NOTE:** If **Address(Student, Sibling, Application)** is set to **Always Import** and any of the **Suspend Conflicts for:** student options are checked and found active, then the **Address** data processing option changes to **Import if null, else put in Conflict** for that record.

## Defining the Online Application Import Version to Use

You can configure A&T to import applications in either v3 or v4 format.

This setting affects the way that One deals with incoming students who are not already linked to the transfer group that was specified for them during the online application process. If **v3** is selected then the student is displayed in the **Automatched outside Transfer Group** sub tab of the A&T v3 client's **Tools | Manage eApplications | Unmatched** screen. You can select a transfer group for this student to be added to manually. However, if **v4** is selected then the matched student is linked to the incoming transfer group and no manual intervention is needed.

- Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
- Open the **Define Version of Online Applications Import to Use** section and then click **Edit** to make the **Version of Online Applications Import to Use** field editable.



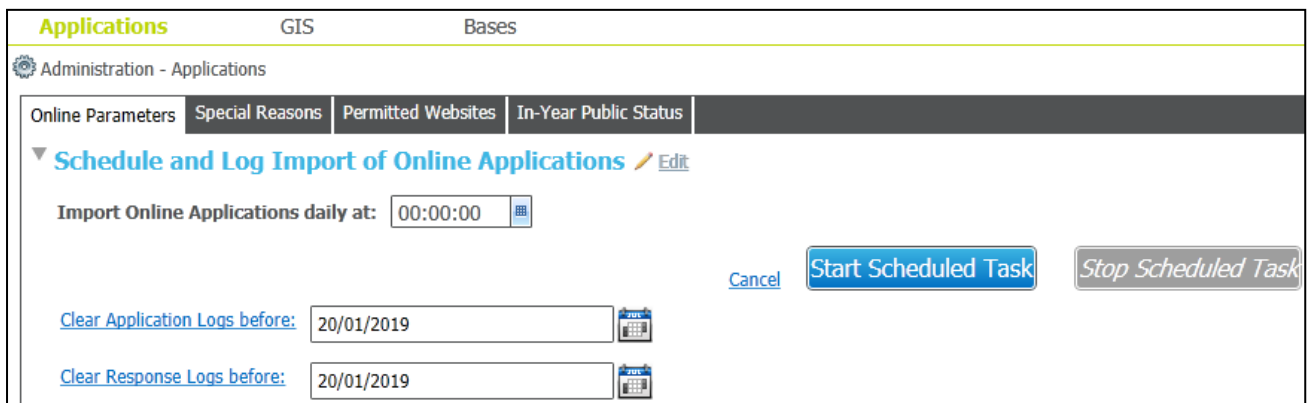
3. Select either the **v3** or **v4** radio button, as required.
4. Click the **Save** button to save your changes.

**NOTE:** You cannot revert to v3 once you have selected v4 as the default import version.

## Scheduling the Import of Online Applications

Enables you to set up a daily import of v4 applications, and to specify a time of day for those applications to be imported.

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
2. Open the **Schedule and Log Import of Online Applications** section and then click the **Edit** button to display editable fields relating to import scheduling.



3. Select the time you wish the daily import of applications to take place from the **Import Online Applications Daily at** field.
4. Click the **Start Scheduled Task** button to confirm your changes and schedule the import.

## Clearing the Application and Response Logs

The Application Status/Error Log lists all imported files (applications and parent/carer responses). You are advised to clear the logs periodically, as they could take up a lot of database space if left unchecked.

One enables you to clear the **Application** logs (i.e. the ATON\_PROCESS\_ERROR and ATON\_APPL\_COUNT tables) and the **Response** logs (i.e. the ATON\_PCRESPONSE\_PROCESS\_ERR table) separately.

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
2. Open the **Schedule and Log Import of Online Applications** section and then click the **Edit** button to display editable fields relating to import scheduling.

3. If you wish to clear the **Application** logs:
  - a. Enter a date into the **Clear Application Logs before** field. Everything added to the Application logs prior to this date will be deleted.
  - b. Click the **Clear Application Logs before** hyperlink. A confirmation dialog is displayed.
  - c. Click the **Yes** button to clear everything in the Application logs that is older than the specified date.
4. If you wish to clear the **Response** logs:
  - a. Enter a date into the **Clear Response Logs before** field. Everything added to the Response logs prior to this date will be deleted.
  - b. Click the **Clear Response Logs before** hyperlink. A confirmation dialog is displayed.
  - c. Click the **Yes** button to clear everything in the Response logs that is older than the specified date.

**NOTE:** You must be either a system administrator or have read-write or read-write-delete access to the **Admissions set Up and Population | Applications Administration** business process in order to clear logs.

## Configuring Public Access Restrictions

A&T's **Public Access** function enables you to specify the dates between which the general public can access Admissions Online. You can also specify whether members of the public can make online applications for In Year school transfers.

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
2. Open the **Public Access** section and then click the **Edit** hyperlink to display editable fields related to public access times.



## Administration

3. Enter the date you wish to make Admissions Online accessible to the public into the **Start Date** field.
4. Enter the date that you wish to close Admission Online into the **End Date** field.

**NOTE:** The **Start** and **End** dates are not the same as the transfer group opening and closing dates. The **End** date is normally set a long time into the future, and is only changed if the entire Admissions Online system needs to come down (for example, for maintenance)

5. Optionally, enter a value into the **Maximum Login Attempts** field.

If the user exceeds this number of login attempts then their A&T Online account is locked. If you wish to unlock a particular account, contact the Service Desk.

**NOTE:** The **Maximum Login Attempts** field does not affect Citizen Portal, which manages logins separately.

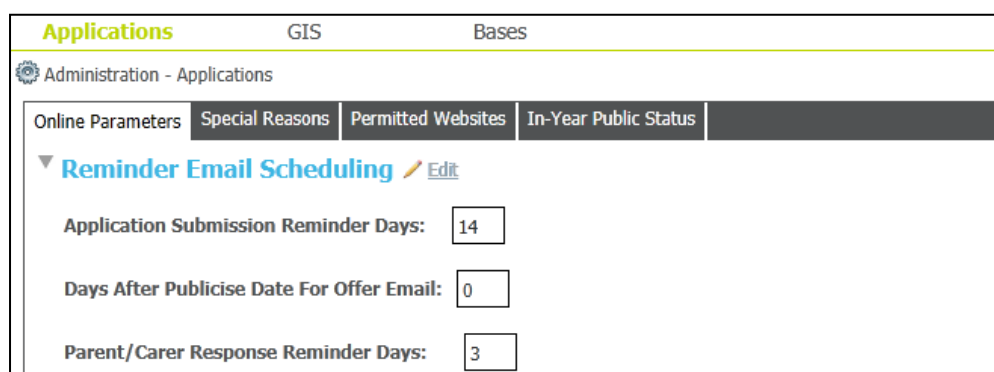
6. If you wish to enable applicants to make In Year applications online, select the **Allow In Year Applications Online** check box.
7. Click the **Save** button to save your changes.

## Scheduling Reminder Emails

The **Reminder Email Scheduling** of the **Administration | Online Parameters** tab enables you to configure the timing of A&T's automated reminder emails.

To configure these settings:

1. Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
2. Open the **Reminder Email Scheduling** section and then click the **Edit** hyperlink to display editable fields related to email scheduling.



The screenshot shows a web interface for 'Administration - Applications'. At the top, there are tabs for 'Applications', 'GIS', and 'Bases'. Below this is a sub-header 'Administration - Applications' with a gear icon. A navigation bar contains 'Online Parameters', 'Special Reasons', 'Permitted Websites', and 'In-Year Public Status'. The 'Reminder Email Scheduling' section is expanded, showing an 'Edit' link. Three input fields are visible: 'Application Submission Reminder Days' with the value 14, 'Days After Publicise Date For Offer Email' with the value 0, and 'Parent/Carer Response Reminder Days' with the value 3.

3. Enter a value into the **Application Submission Reminder Days** field. This is the number of days before the transfer group closing date that reminder emails are sent to all applicants who have created but not submitted applications. The default value is 7.
4. Enter a value into the **Days After Publicise Date for Offer Email** field. This is the number of days after the Publicise Date that emails are sent. The default value is 0.

For more information on using **Days after Publicise Date for Offer Email**, see the Offer Day Preparation Guide, available from the [One Publications](#) website.

**IMPORTANT NOTE:** *Days after Publicise Date for Offer Email* must be set to 0 at the start of the process in order to ensure that the offer emails are sent on the Publicise Date. Likewise, this field must be set back to 0 for each offer round (e.g. Primary and Secondary).

- Enter a value into the **Parent/Carer Response Reminder Days** field. This is the number of days before the Response Closing Date that reminder emails are sent to all applicants who have not yet responded to an online offer. The default value is 3.

The **Enable Parent/Carer Response Online** check box must be selected and the **Response Closing Date and Time** fields on the **Transfer Groups | E-Applications Settings** tab must be completed in order for One to send Parent/Carer Response Reminder emails.

- Click the **Save** button to save your changes.

**NOTE:** After the **Application Submission Reminder Days** and **Parent/Carer Response Reminder Days** thresholds have been reached, a daily reminder email is sent to all relevant applicants. If you do not wish emails to be sent daily, set these fields to a lower number after the first batch of reminder emails has been sent. No additional reminder emails are then sent until the new threshold is reached.

For example, suppose that **Application Submission Reminder Days** is set to 7. Ordinarily, One would start sending reminder emails seven days before the closing date, and would send one reminder email a day until closing. However, if you were to reduce **Application Submission Reminder Days** to 1 after the first emails had been sent, then no more emails would be sent until the day before the closing date.

## Editing Display and Email Options

The **Display and Email Options** section of **Administration | Applications | Online Parameters** enables you to configure whether or not applicants can use the postcode search, which preference schools they can select and whether or not student DOBs and names are included in automated emails.

- Select **Administration | Applications | Online Parameters** to display the **Online Parameters** page.
- Open the **Display and Email Options** section and then click the **Edit** hyperlink to display editable fields related to display options.

The screenshot shows the 'Display and Email Options' section in the 'Administration - Applications' interface. The 'Display and Email Options' section is expanded, showing an 'Edit' link. The options include: 'Display Postcode Search' (checked), 'Include Student Name & DOB In Emails' (checked), and 'Preference Schools To Display Online'. A dropdown menu is set to 'Display All Schools Except Those From'. A list of schools is shown on the left, with blue arrows indicating that items can be moved to the right-hand area.

- If you wish applicants to be able to see and use the postcode and catchment search facilities, select the **Display Postcode Search** check box.

4.

**NOTE:** Your Local Authority must have access to local and surrounding address data in order to use the Postcode Search. This can be achieved by importing the LLPG (Local Land and Property Gazetteer) or PAF (Post Office File) Data.

Your Local Authority must have defined catchment areas for use in the allocation routines in order to use the Catchment Search.

5. If you wish A&T's automated emails to display the relevant child's name and date of birth details, select the **Include Student Name and DOB in Emails** check box.
6. If your Local Authority is Welsh, select an option from the **Order of Text in Online Application Emails** menu. The options are **English Followed by Welsh** and **Welsh Followed by English**. This option is not available to English LAs or EANIs (Northern Ireland).
7. Use the **Preference Schools To Display Online** menus to select the preference schools that you wish to display online:
  - a. Select either **Display All Schools Except Those From** or **Display Schools From** from the drop-down menu. If you select **Display Schools From**, only the schools in the right hand menu are available to applicants. If you select **Display All Schools Except Those From**, all schools except those in the right-hand menu are available to applicants.
  - b. Use the left and right arrows to move schools between the two menus. If you move a country or authority then all schools in that country are either excluded or included from the search (depending on the option you selected in the previous step).
8. Click the **Save** button to save your changes.

## Configuring Special Reason Codes

Special reasons are factors not listed within the DfE defined Oversubscription Criteria that are used to rank applicants for a particular receiver. Up to three special reasons can be used when determining a student's rank. The **Special Reasons** page enables you to configure special reason codes so that they can then be used to rank students.


### Adding Special Reason Codes

1. Select **Administration | Applications | Special Reasons** to display the **Special Reasons** page.

Applications GIS Bases


Administration - Applications

Online Parameters Special Reasons Permitted Websites In-Year Public Status

**Special Reason 1**  [Edit](#)


[+ Add Code](#)

Code	Description	Weight
SP1	SEN	99
SP2	SEN & Catchment	98
SP3	Catchment & Sibling	97

**Special Reason 2**  [Edit](#)

[+ Add Code](#)


Code	Description	Weight
MED	Medical	98

**Special Reason 3**  [Edit](#)

[+ Add Code](#)

Code	Description	Weight
CT1	Catholic BPT	50
CT2	Catholic Confirmed	70

- Select the **Add Code** hyperlink for a particular reason to display editable fields relating to special reason codes.

**Special Reason 1**  [Edit](#)

Code  Description  Weight

[+ Add Code](#)

Cancel

- Enter a three-digit **Code** for the reason. This code must be unique.
- Enter a **Description** of the reason.
- Enter the **Weight** of the reason. This is a value between 1-99 that is used to determine the status of the special reason. The higher the number of points, the greater the reason's priority.
- Click the **Save** button to save your changes.

**NOTE:** Codes are only defined for the reason they were set up under. For example, if you set up a new code under Special Reason 1, that code is only selectable under that special reason. You must define the code under Special Reasons 2 and/or 3 in order to make the code selectable under other reasons.

## Editing Special Reason Codes

1. Select **Administration | Applications | Special Reasons** to display the **Special Reasons** page.
2. Select the **Edit** hyperlink next to the special reason you wish to edit. The code details for that reason become editable.

Code	Description	Weight	
SP1 *	SEN	99	Delete
SP2 *	SEN & Catchment	98	Delete
SP3 *	Catchment & Sibling	97	Delete

3. Make the required changes to the reason's codes.
4. If you wish to delete a code from the selected reason altogether, click the **Delete** button for that code.
5. Click the **Save** button to save your changes.

## Configuring Permitted Websites

Websites listed in the **Administration | Applications | Permitted Websites** tab can be used as valid data entries in fields found in A&T applications. Websites that are not in the list are rejected.

### Adding Permitted Websites

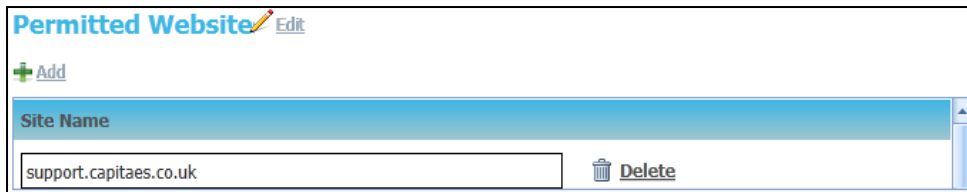
1. Select **Administration | Applications | Permitted Websites** to display the **Permitted Websites** page.

2. Click the **Add** hyperlink to display the **Site Name** field.

3. Enter the URL of the site you wish to add into the **Site Name** field.
4. Click the **Save** button to add the site.

## Editing Permitted Websites

1. Select **Administration | Applications | Permitted Websites** to display the **Permitted Websites** page.
2. Click the **Edit** hyperlink to make the list of permitted websites editable.

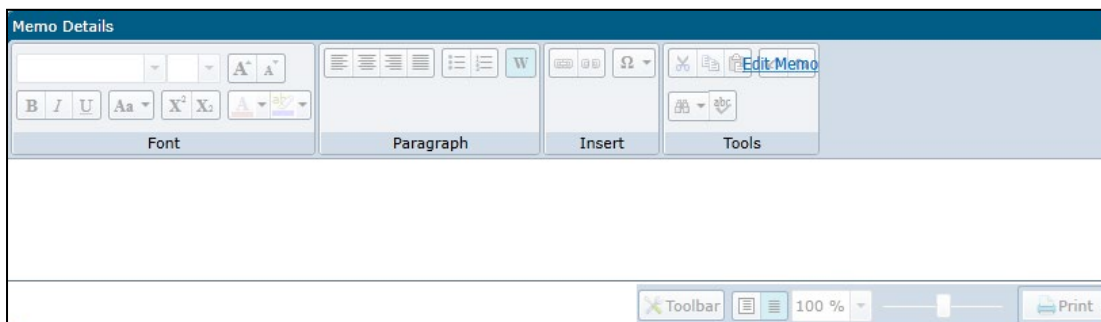


3. Make any required changes to the URLs in the list.
4. If you wish to delete a site from the list, click that site's **Delete** button.
5. Click the **Save** button to save your changes.

## Recording Memos

Memos are used throughout A&T Back Office as a means of recording additional details about a particular student or application. To record a memo:

1. Click the **Memo** button to display the **Memo Details** dialog:



2. Click the **Edit Memo** hyperlink to make the memo text editable.
3. Enter memo text as required. You can format the contents of the memo using the standard word processor-type controls on the toolbar.
4. Click the **Save** button to save your changes.

## Alerts in A&T

Alerts can be configured against student and application details in v4 Client, A&T v4 Back Office and CSS v4 Online. A&T Back Office uses three types of alert:

- **Risk Alerts** (also called pop up alerts): These alerts are automatically displayed to warn of risks or concerns registered against a student. For more information on creating risk alerts, see [Defining Risk Alerts](#) on page 61.
- **Trigger Alerts**: These alerts are displayed when changes are made to nominated database tables and fields. Trigger alerts are set against students and applications in the v4 Client via **Tools | Administration | Alert Definition**. They are subject to the security levels set for business processes in the v4 Client via **Tools | Permissions | User Group Processes**.

There are three pre-defined A&T-specific trigger alerts:

## Administration

- Student change of Local Authority.
- Student change of address.
- Student feeder base changed.

The pre-defined trigger alerts are not active by default and must be enabled before users can receive them.

- **SQL Alerts:** These alerts are created and initiated on the basis of a user enquiry to a particular item. For example, a user may elect to view the details of a student. As a result of this enquiry, an SQL statement is run against the database, with the result output to a message box or email.

SQL alerts are set against students and applications in the v4 Client via **Tools | Administration | Alert Definition**. They are subject to the security levels set for business processes in the v4 Client via **Tools | Permissions | User Group Processes**.

Any v4 Client alerts that are defined to display against a student are displayed in the A&T Back Office **Students | All Students** and **Students | Applications** screens after that student has been selected.

Any v4 Client alerts that are defined to display against an application are displayed in the A&T Back Office **Students | Applications** screen after that application has been selected.

**NOTE:** For more information on configuring alerts in One, see the *RG\_Administration\_Alerts* reference guide, available from the [One Publications](#) website.

## Emails Sent from Admissions and Transfers Online

A&T Back Office sends automatic emails at various stages of the application and offer processes. Emails are only sent to applicants who have registered as public facing users. They are not sent to applicants who have applied via the internal Admissions Online system in One Online.

Some of the email text is hard coded within One, but most of the emails include a block of text that is user-definable for each transfer group. Welsh Local Authorities can define both Welsh and English text to be included in the email, and can also choose in which order they would like the different language sections to appear. For more information on configuring user-definable email text, see [Appendix D – A&T Email Text](#) on page 291.

**NOTE:** You can control whether emails contain the child's name and date of birth using the **Include Student Name and DOB in Emails** check box on the **Administration | Applications | Online Parameters** tab. For more information on this process, see [Editing Display and Email Options](#) on page 263.

## Application Emails

- **Submission Confirmation (Normal Phased):** After an application is submitted, applicants are sent a confirmation email detailing their preferences and the **Publicise** date. The text of this email varies slightly, depending on whether or not the applicant has expressed a wish to be informed of their offer by email.
- **Submission Confirmation (In Year):** After submitting an application, applicants are sent a confirmation email detailing their preferences and the **Publicise** date. Online In Year applications cannot be edited after submission.

- **Reminder to Submit Newly Created Application:** This email is sent on a daily basis to all applicants who have created an application but not submitted it, starting from a pre-set number of days before the **Transfer Group Closing Date**. This number of days is set on the **Administration | Applications | Online Parameters** tab.

The **Reminder to Submit Newly Created Application** email is not sent for inactive students and withdrawn applications.

- **Resubmitted Application Confirmation (Normal Phased Transfer Group):** Applicants are sent a confirmation email after editing and submitting an application. The email includes their preferences and the **Publicise** date. The text varies slightly depending on whether or not the applicant has expressed a wish to be informed of their offer by email.

Applicants cannot edit In Year applications online.

- **Reminder to Resubmit an Edited (Previously Submitted) Application:** This email is generated if an application is edited online after being previously submitted, but is not resubmitted on the day that the edit took place.

## Offer Emails

- **Offer Email:** The Offer email is only sent out to parents/carers who have asked to be sent emails. Once the allocations have been set and the **Publicise** date has passed then the email is sent to relevant parents/carers to inform them of their offer.

In order for the Offer email to be generated, you must first ensure that the transfer group has a **Publicise** date entered via the **Process | Transfer Groups | E-Application Settings** tab. For more information on setting the Publicise date, see [Viewing E-Application Details](#) on page 52.

All of the following criteria must be true in order for offer emails to be sent:

- The parent has registered using the Admissions Online public facing system.
- The applicant has registered via the email link.
- There is a valid email address stored against the parent record. This will be true if the application was made using the Admissions Online public-facing system.
- There is an application record that has not been withdrawn for the student.
- The Publish Offer Statuses Online routine has been run for the transfer group.
- An online application was made for the student.
- The application has a status of either **Submitted for the first time** or **Resubmitted**.
- The parent has indicated that they wanted to receive their offer by email.
- The offer email has not already been sent to the parents.
- There is a record for this child in the GP\_STUDENT table (the table that stores online students) that matches the student's application record.
- There is a record in the transfers table (i.e. there is an application in the main One database) for the child that matches the transfer group.
- The **Publicise** date of the transfer group plus the set number of offset days is equal to the current system date.



- **Reminder to Respond to Offer:** This email is automatically sent to all online applicants who have not responded to their offers. It is sent daily for transfer groups that have the **Enable Online Parent / Carer Responses** check box selected on the **Process | Transfer Groups | E-Applications Settings** tab and a number of days entered in the **Parent/Carer Response Reminder Days** field in the **Reminder Email Scheduling** section of the **Administration | Applications | Online Parameters** tab.

If your Local Authority has not coordinated offer information with all other relevant Local Authorities then duplicate offers may be made. If a parent/carer has recorded a response to one or more other offers within the transfer group, but not to the actual place(s) offered, then the reminder email is sent.

The **Reminder to Respond to Offer** email is not sent to inactive students, withdrawn applications and students who have not been offered a place.

- **Offer Response Confirmation:** This is a confirmation email for applicants who have submitted their responses to offers made online. The email is sent after they have completed the information on the **Offer Information** page online and clicked the **Next** button.

## Administration Emails

Confirmation emails are sent when an applicant make changes to their account. In addition, the system administrator receives a warning email if the offer emails cannot be sent due to an incorrect SMTP server setup.

- **Change of Email Address:** Applicants who change their email address in A&T v4 Public Facing must confirm this change by logging in to their account via a link sent to their new email address.
- **Password Reset:** Applicants who change their email address in A&T v4 (Public Facing) must confirm this change by logging in to their account using their new password.
- **Unable to Send Offer Emails (Admin Warning):** It is not possible to send automatic emails to applicants informing them of their offers on the **Publicise** date if the **Publish Offer Statures Online** process has not yet been run

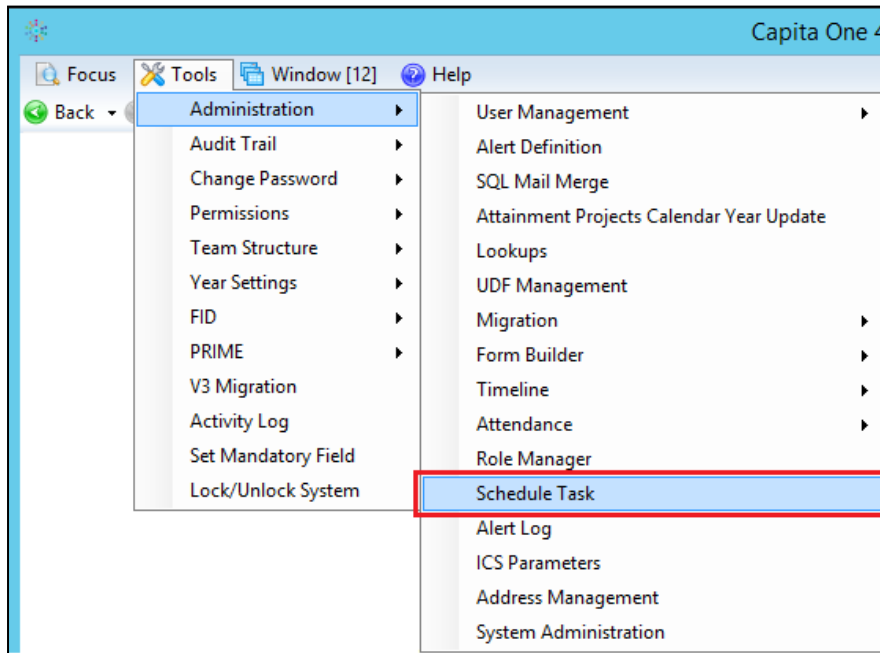
In this situation, a single warning email is sent to the mailbox listed as the **From ID** in **SMTP Server Setup for A&T**, as defined in the v3 Client via **Tools | System Administration | Online SMTP Server Setup**. This email contains instructions detailing how to remedy the situation.

## Configuring the Scheduled Email Task

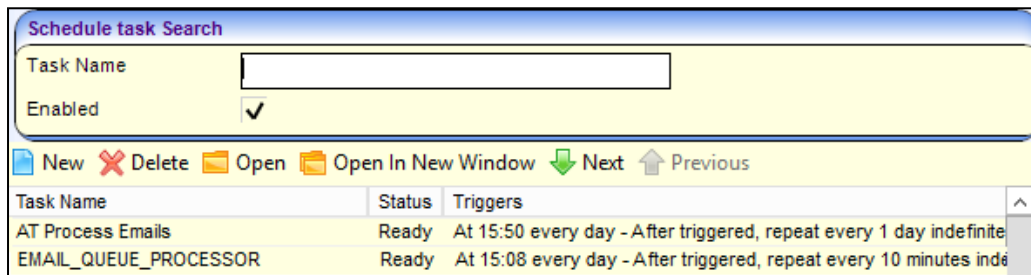
Admissions emails require the **PROCESS\_ANT\_EMAILS** scheduled task to be configured in order to run. This task generates bulk emails (such as offers and reminders to resubmit).

### Confirm Email Tasks are Configured

1. In the v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task Search** dialog.



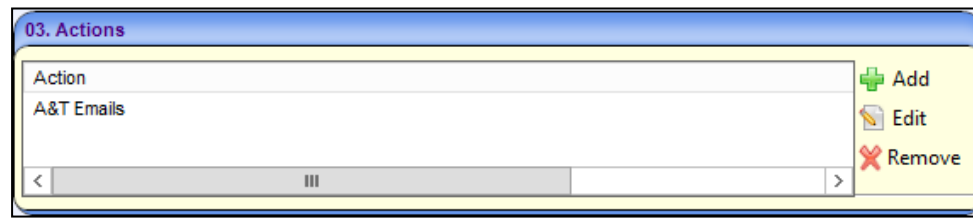
2. Click the **Search** button to display a list of current scheduled tasks.
3. Confirm that the **PROCESS\_ANT\_EMAILS** task is included in the list.



4. If the **PROCESS\_ANT\_EMAILS** task is not listed, then your LA's One Coordinator should set the task up. If it is not on the list, untick Enabled above the list, as it might not be active.

For more information on setting up scheduled tasks see the v4 Scheduled Tasks technical guide, available from <https://www.onepublications.com> and My Account.

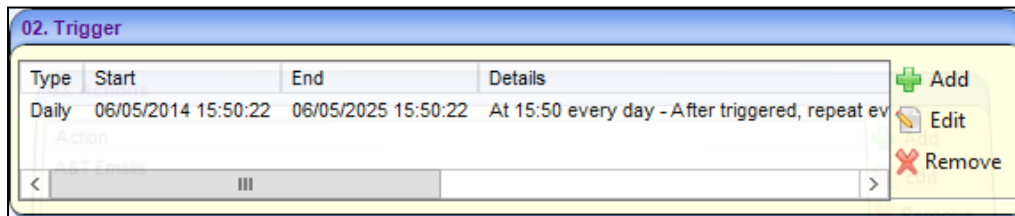
**NOTE:** The **Task Name** of the **PROCESS\_ANT\_EMAILS** task may vary. However, the task **action** for the bulk email task (viewable by double clicking the task, then clicking the **03.Actions** button) is always set to “A&T Emails”.



## Check Triggers

Confirm that the **PROCESS\_ANT\_EMAILS** task will trigger at the correct time:

1. Double-click on a task to display editable fields relating to that task.



2. Click the **02. Trigger** button to display the task’s trigger details.
3. Highlight the task’s trigger and then click the **Edit** button to display the **Trigger** dialog.
4. Ensure that the **Daily** radio button is selected and that the **Recur every** field is set to 1.
5. Enter the date and time you want the trigger to start into the **Start** field.
6. Enter “1 day” into the **Repeat task every** field.
7. Enter “Indefinitely” into the **duration of** field.
8. If required, enter an expiry date into the **Expire** field.
9. Click the **Ok** button to confirm your changes.

Trigger : Daily

Ok Cancel

One time  Daily  Weekly  Monthly  Monthly Days of the Week

Start 06/05/2014 15:50:22 Recur every: 1 days

Months

January  February  March  April  May  June  
 July  August  September  October  November  December

Days

1  6  11  16  21  26  31  
 2  7  12  17  22  27  Last  
 3  8  13  18  23  28  
 4  9  14  19  24  29  
 5  10  15  20  25  30

nth Day of the week for the Month

First  Second  
 Third  Fourth  
 Last

Day of the week

Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Advanced settings

Repeat task every 1 day for a duration of Indefinitely

Expire 06/05/2025 15:50:22

At 15:50 every day - After triggered, repeat every 1 day for a duration of Indefinitely. Trigger starts on 06/05/2014, and expires on 06/05/2025 at 15:50:22.

## Appendix A – List of Preference Reasons

### Applicant / LA Reasons

- **Named School:** Select this check box if the student has a statement of special educational needs and this is the named school on the statement. One takes into consideration whether or not **Named School** is chosen as an oversubscription criterion on the **Process | Transfer Groups | Sub Groups** tab.
- **Public Care:** Indicates whether the applicant has stated that the student is in **Public Care**. If this is selected as an oversubscription criterion on the **Process | Transfer Groups | Sub Groups** tab, then the student is preferentially allocated. The name of the Care Authority is imported but may be edited if necessary.

If the student is currently *In Public Care* (indicated on the **Student Details** page), then the Local Authority responsible must be displayed when a preference is added.

- **Sibling:** Select this check box if the applicant has indicated that the student has a sibling currently attending the receiver or a linked receiver. If a sibling link is to be used for allocation, then the details of the sibling and the school number (if the sibling attends a linked school), should be entered via the **Current Siblings** dialog. This dialog is opened by clicking on the magnifying glass next to the **Sibling** check box.

When you open the **Current Siblings** window, any entered or selected siblings are listed at the top. Click **Edit** to see more of the sibling's details or edit the linked school number.

- **Catchment:** Automatically selected if **Use GIS** has been specified for the transfer group and the student's address is within the catchment of the receiver base. Catchment operates for both GIS and Postcode catchments.
- **Distance (Applicant's Reason):** Select this check box if the applicant has indicated home-school distance as a preference reason.
- **Distance (LA Reason):** The distance from the student's registered correspondence address or admission address to the receiver.

In most cases the admission address is the same as the current correspondence address. However, there are some exceptions to this rule, for example in the case of returning Service or Crown Servant Personnel. You can choose whether to run the A&T processes on the basis of correspondence address or admission address for each transfer group by setting the **Use Admission Address check box on Process | Transfer Groups | Details**.

A distance need only be entered if **Distance** has been chosen as one of the selection criteria on the **Allocation Algorithm** sub-tab of **Tools | Module Administration | Transfer Groups** and the applicant has selected **Distance from Home** as a preference reason. Distances can be calculated automatically during pre-offer processing.

- **Feeder Link:** A check box that is automatically selected if the student's registered feeder base is linked to the receiver and the Feeder Receiver process has been run. May be de-selected if required.
- **Social:** Select this check box if the applicant has indicated that there is a social reason for their preference.
- **Medical:** Select this check box if the applicant has indicated that they wish to apply to the school on medical grounds.
- **Social/Medical:** Can only be selected by LAs. Select this check box to indicate that the Local Authority from whom a file has been received will send further social or medical information about the selected student.

## Appendix A – List of Preference Reasons

If you are the sending Local Authority, select this box to inform the Local Authority to whom the file is being sent that you will send further social or medical information about the selected student. Optionally, you can store the additional information in One using the linked files facility, from where you can either send the information in the form of an email or send paper copies in the post.

- **Religion:** Select this check box if the applicant has indicated that they wish to apply to the school on religious grounds. Use the lookup table to select the faith of the school.
- **Ease of Travel:** Tick this box if the applicant has indicated ease of travel as a reason for their preference.
- **School Gender:** If the applicant has indicated **School Gender** as a reason for their preference for this school, select the gender of the school intake (**Co-Ed**, **Female** or **Male**) from the lookup table. The intake gender can later be validated against the gender of the student.
- **Specialist School:** If the applicant has indicated that they prefer this school because it is a specialist school, select the specialism(s) of the school by clicking on the magnifying glass. The number of specialisms that have been selected is indicated. The selected specialisms can later be validated against the selections made by the applicant.
- **Selective:** Select this check box if the applicant has indicated that they prefer this school because it is a selective school. This can later be validated against the base details.
- **Other:** Select this check box if the applicant has selected the **Other Reason** check box and provided supporting information.
- **Special Reasons:** Click the magnifying glass to open the **Select a Special Reason** dialog. This dialog enables you to choose the special reasons as indicated by the applicant. You can choose from the special reasons for this sub group alone, or for the whole transfer group. Special reasons are weighted according to points assigned on the **Process | Transfer Groups | Sub Groups** tab and may be used to determine the allocation rank of a student. Up to three special reasons may be used.

The **Special Reason** memos are linked, so the **Applicant** and **Local Authority** memos are the same.

**NOTE:** If you wish to consider a further special reason and are not allocating on the basis of test mark then you can use the **Test Results** field to add an additional reason. To do so, enter the weighting of the additional special reason into the **Test Results** field and select **Test Mark** as an oversubscription criterion on the **Process | Transfer Groups | Sub Groups** tab.

- **Staff Child:** Select this check box if the applicant has indicated that they are applying for a place for a child of a member of staff working at the preference school. This must be verified by the Local Authority.

### LA Only Panel

- **Traffic Light (Allocation Status Indicator)**

GREEN indicates one of:

- **O:** Offer
- **P:** Provisional
- **Y:** Allocated
- **A:** Accepted by Parent.

RED indicates one of:

- **Null:** Not Processed
- **W:** Waiting List

- **N:** No Offer
- **X:** Refused by Parent
- **R:** Refused by LA
- **Q:** No Longer Required.
- **Status:** Set automatically, depending on the applicant response and the stage reached in the Offer process. For a complete list of possible offer status codes and descriptions, see [Appendix B – List of Status Codes](#) on page 281.
- **Test Results:** Displays test results for selective schools. This field can be edited from the **Process | Transfer Groups | Tests** tab, either manually (by users with read/write or read/write/delete access to the **Test Results - Manual Entry** permission) or by file import. Tests are defined in the v4 Client via **Tools | Administration | Lookups** (Lookup Table ID 0421). These tests should then be associated with transfer groups and the results imported and processed on the **Process | Transfer Groups | Tests** tab.
- **Online:** This field is display only and is completed automatically to indicate that the preference has been created as the result of an imported A&T Online application.
- **Late:** This check box shows whether or not a late application has been submitted for this preference. If selected, the **Preferences** browse indicates **Late** against that preference, ensuring that this student is included in a Late ADT file.  
  
**Late** can be defined as one of the oversubscription criteria and each Local Authority can decide whether or not to include late applications in the Make Offers process, depending on their policy.
- **Appeals:** Select this check box if the student is to be allocated to the indicated base as a result of an appeal. This box is selected automatically if the **Update Preferences** button on the **Manage Transfer Group | Appeals** tab is clicked.  
  
 In exceptional circumstances, it may be necessary to allocate a place over PAN (for Normal Phased admissions) or where no vacancy exists (for In Year admissions). This is only possible if the **Exceptional** or **Appeals** check box has been selected.
- **Deferred:** This check box is for information only and is not used in the allocation process. It indicates that an applicant has taken up the right to defer entry to the Reception NCY until the term after the child is five. This field can be included in reports.
- **Exceptional:** Select this check box if the allocation is to be made manually. If there is an exceptional reason why the student should attend this school then it may be necessary to allocate a place over PAN (for Normal Phased admissions) or where no vacancy exists (for In Year admissions). This must be done manually.  
  
 Manual allocations can only be made if the **Exceptional** or **Appeals** check box has been selected.  
  
 Supporting evidence can be recorded in the form of a memo or linked file.
- **From Waiting List:** This check box is selected automatically if the student is allocated to the base from the waiting list - i.e. if the allocation status changes from **W (Added to Waiting List)** to either **Y (Allocated)** or **A (Accepted by Parent)**.
- **Do not consider for mainstream:** Check this box if all the following conditions are met:
  - The application is for the Aptitude or Ability band.
  - The application is for a base using Aptitude or Assessed banding.
  - The applicant does not wish the child to be considered for a place in the mainstream school if they are not offered a place in that band.

- **Preference Memo:** Used to record information that the Local Authority wishes to retain for future reference. For example, the applicant may have claimed a sibling which the Local Authority rejects. It is worth recording in this memo why the claim was rejected as this may be needed if there is a subsequent appeal.
- **Other Details Memo:** Use the **Other Details** memo to record any information the applicant has provided in support of their application, particularly if the **Other** check box has been selected. Data is imported into this field if supplied electronically via online applications or from Other Local Authorities during the process of coordination. As an example, the field might contain supporting information entered by an applicant concerning an application to a specialist school. This memo can store a maximum of 3000 characters.

### Parent/Carer Response

- **Applicant Response:** The Applicant Response can have the following values:
  - **Accept**
  - **Reject**
  - **Go on waiting list**
  - **Appeal**
  - **Appeal & go on waiting list**
  - **Other decision**
  - **No response to make.**

The available options depend on the current offer status. For more information on offer statuses, see [Appendix B – List of Status Codes](#) on page 281.

After an online Parent / Carer response has been imported (i.e. the **Imported from Online** field shows **Yes**), then the response is displayed here. If you subsequently change the response then you are warned but are able to continue.

If an applicant response of **Reject** is imported:

- The original offer status is retained and an exception message is raised, ensuring that the student is not left without an allocated place. This offer status must be reviewed and changed manually if necessary.
- Any supporting text is also imported.

Manual changes and most imported applicant responses have implications for the allocation status, which may be updated as a result:

Applicant Response	Offer Status is changed to
Accept	A - Accepted by Parent
Reject	X – Refused by Parent
Go on waiting list	W – Waiting List
Appeal	No change to offer status
Appeal and go on waiting list	W- Waiting List
Other Decision	No change to offer status
No response to make	No change to offer status



The **Imported from Online** flag is display only and is updated automatically depending on the method of input of the response. The flag displays **Yes** if the response has been imported from One Online.

If the applicant response is manually updated and the allocation status changes as a result, then the **Manual Allocation** tab is displayed. You must save the changes to the manual allocation status for this preference. The **Preference History** is also updated.

If a change has been made that updates an applicant response that was imported from A&T Online, then you are asked to confirm before saving as a response that was originally set by the applicant will be changed. In this circumstance, the **Imported from Online** flag is set to **No**.

If the change to the applicant response is not from an online imported response, then no confirmation is needed.

- **Imported from Online:** This field is display only and is updated automatically depending on the method of input of the response. If the response has been imported from One Online then the field displays **Yes**, and you are warned if you subsequently change the response.
- **Supporting Text:** This memo records any additional information a parent/carer has provided in support of their response to a preference. It can contain any information entered both manually and online.

## Appendix B – List of Status Codes

### Application Status

The following codes are used throughout Admissions and Transfers to refer to application status:

Internal / External Code	External Description	Internal Description (limited to 30 characters)
CLOS	Closed / completed	Closed / completed
OFFW	Offered and waiting for applicant response	Offered, waiting for response
PEND	Pending	Pending
PROC	Processing , offer to applicant not yet made	Processing, offer not yet made
WAQA	Waiting for Information from other admission authority	Waiting for info from other AA

### Offer Status

The following codes are used throughout Admissions and Transfers to refer to offer (allocation) statuses:

Offer Status Code	Offer Status	Status Displayed in Admissions Online
O	Offer	Allocated
N	No Current Offer	Not Allocated
P	Provisional	Allocated
Y	Allocated	Allocated
A	Accepted by Parent	Accepted by Parent
R	Refused by Local Authority	Not Allocated
X	Refused by Parent	Not Allocated
Q	No Longer Required	Not Allocated
W	Added to Waiting List	Not Allocated
	Not Processed	Not Allocated

## Appendix B – List of Status Codes

The DfE uses a simplified list of five status codes for offer export (via the ALT file):

DfE Offer Status Code	Offer Status	Description
O	Offer	The <u>other</u> Local Authority can make an offer (perhaps on behalf of a school which is its own admission authority) of a place to the child in the identified school.
N	No Offer	The <u>other</u> Local Authority does not, at this stage, offer a place to the child at the identified school. The preference may result in an offer being made in a subsequent iteration of the process.
D	Discard Preference	The <u>home</u> Local Authority is able to offer a higher preference place. The <u>other</u> Local Authority need no longer investigate the preference.
A	Accept	The place has been offered and the parent/carer has accepted the place. The place should not be removed, as it is likely that the parent will take up the place. This response may be accompanied by free text, indication of an appeal or a wish to go on a waiting list for another preference.

DfE Offer Status Code	Offer Status	Description
C	Not Accepted	The parent/carer has <u>not yet</u> accepted the offer. The place is still offered. As such, it is still an offer, with the caveat that the parent should be contacted as it is unlikely that the parent will take up the place. This response may be accompanied by free text, indication of an appeal or a wish to go on a waiting list for another preference. It is important to note that the offer remains until the Local Authority decides to either remove it or discard the preference.

**NOTE:** The Offer Status of **W** (Withdraw - used when an offer previously made is being withdrawn) has been removed by the DfE. Any statuses of **W** that are found in an export file are included in the exception report.

To ensure that only the DfE codes are exported in the ALT file, the **Allocation Status** codes are mapped to the **Offer Status** codes on export.

From Offer Status Code in One (CHOICES.ALLOCATE_FLAG)	To DfE Offer Status Code (<OfferStatus> tag in file)
O – Offer	O
N – No Current Offer	N
Y – Allocated	O
P – Provisional	O
A – Accepted by Parent	A
R – Refused by LA	N
Q – No Longer Required	D
X – Refused by Parent	C
W – Added to Waiting List	N – should not occur until after steady state (Waiting List)

## Appendix B – List of Status Codes

The DfE offer codes are mapped to the One allocation codes when ALT files are imported.

DfE Offer Status Code in ALT file	Mapped to Capita One Offer Status Code
O	P
N	N
D	Q
A	A
C	X

Where the offer status in the imported file is **A** (Accepted by Parent), then as well as populating CHOICES.ALLOCATE\_FLAG with **A** One does the following:

- Populates the **Export Status** field (CHOICES.EXPORT\_STATUS) with **A**.
- Populates the **Parent/Carer Response** field with **AC** (Accept).

Where the <OfferStatus> tag in the imported file is **C** (**Not Accepted by Parent**), then as well as populating the CHOICES.ALLOCATE\_FLAG with **X** (Refused by Parent) One does the following:

- Populates the **Export Status** field (CHOICES.EXPORT\_STATUS) with **C** (**Not Accepted**).
- Populates the **Parent/Carer Response** field with **RJ** (**Reject**).

If a student is in more than one band for a Receiver, then each band preference has its own offer status in addition to the main preference record's overall offer status. This main preference offer status is calculated using a hierarchy. The overall status is the most 'positive' of the individual band offer statuses in the following order: **A, Y, P, O, W, N, null, R, X, Q**.

For example, if one band has a status of **R** and one has a status of **N**, then the overall status is **N**, since this code comes higher up in the hierarchy.

### Response Status

The following codes are used throughout Admissions and Transfers to refer to parent/carers response status:

Applicant Response Code	Description
AC	Accept
RJ	Reject
AP	Appeal
WL	Go On Waiting List
AW	Appeal and go on Waiting List
OD	Other Decision
NA	Not applicable / no response to make
Null	

The **Parent/Carer Response** code (<SuppParOfferResp> tag in the ALT export file) enables a parent to express a response to an offer or non-offer for each of their preferences.

The DfE uses three possible values for this code:

**W** - Waiting List

**A** - Appeal

**O** – Other.

To ensure that the ALT file exports only the DfE codes, the **Parent/Carer Response** codes are mapped to the DfE Supplementary Parental Offer Response codes on export, as per the following table:

One Applicant Response	ALT Export Value of <SuppParOfferResp> (DfE defined value)	Description
AC	None – the tag does not need to be exported	
RJ	None – the tag does not need to be exported	
AP	A	Appeal
WL	W	Waiting List
AW	A	Appeal
OD	O	Other
NA	None – the tag does not need to be exported	
Null	None – the tag does not need to be exported	

When an ALT file is imported, the DfE Supplementary Parental Offer Response codes are mapped to the One **Parent/Carer Response** codes and imported into the **Parent/Carer Response** field of the **Manage Transfer Group | Preferences** tab as follows:

<SuppParOfferResp> tag in ALT	One Parent/Carer Response
A	AP (Appeal)
W	WL (Go on Waiting List)
O	OD (Other Decision)

## Appendix C – List of Parental Interaction Codes

The **Applicant/Parental Response** values displayed on the **Application Details | Preference Reasons** tab depend on the offer status of the preference record.

If the offer status is changed from one of **O** (Offer), **P** (Provisional Allocation) or **Y** (Allocated) to **X** (Refused by Parent) then One updates the offer counts for the receiver concerned.

### Responses available for offer statuses **O** (Offer), **P** (Provisional Allocation) and **Y** (Allocated)

Applicant Response	Offer Status change to
Accept	A (Accepted by Parent)
Reject	X (Refused by Parent)
Other Decision	No change to offer status
No Response to make	No change to offer status

### Responses available for offer status **A** (Accepted by Parent)

Applicant Response	Offer Status change to
Accept	A (Accepted by Parent)
Reject	X (Refused by Parent)
Other Decision	No change to offer status
No response to make	No change to offer status

### Responses available for offer statuses **N** (No Offer), **W** (Waiting List) and **Null** (Not Processed)

Applicant Response	Offer Status change to
Go on waiting list	W (Waiting List)
Appeal	No change to offer status
Appeal and go on waiting list	W (Waiting List)
Other Decision	No change to offer status
No response to make	No change to offer status

### Responses available for offer status R (Refused by LA)

Applicant Response	Offer Status change to
Go on waiting list	W (Waiting List)
Appeal	No change to offer status
Appeal and go on waiting list	W (Waiting List)
Other Decision	No change to offer status
No response to make	No change to offer status

### Responses available for offer status X (Refused by Parent)

Applicant Response	Offer Status change to
Reject	X (Refused by Parent)
Other Decision	No change to offer status
No response to make	No change to offer status

If you select **Reject** then you are asked to confirm the **Offer Status**.

### Responses available for offer status Q (No Longer Required)

Applicant Response	Offer Status change to
Other Decision	No change to offer status
No response to make	No change to offer status



## Appendix D – A&T Email Text

This appendix lists the text of each of A&T's automated emails.

Some emails feature blocks of user-definable text. Where this is the case, the default text is displayed in red. If the user defines their own text for that email, that text replaces the red text.

For more information on customising A&T emails, see [Editing Display and Email Options](#) on page 263.

**NOTE:** The text of some emails varies slightly, depending on whether or not the applicant has expressed a wish to be informed of their offer by email (see the grey highlighted lines in the email text below).

### Submission Confirmation (Normal Phased Transfer Group)

Child's Name: Child Name  
Date of Birth: dd/mm/yyyy

Dear Mr Online Applicant

Thank you for submitting your application for a school place.

This paragraph is new text that has been defined for the Submission Confirmation email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Submission Confirmation parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Submission Confirmation memo for the transfer group.

You have expressed preferences for the following schools in this order of priority:

Rank	School Name	Address
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY
3	Preferred School 3	Bronze Avenue, Oneford, Oneshire ZZ1 1ZX

If you wish to change the details of your application, you may do so by logging back into the School Admissions Service at any time until hh:mm on dd/mm/yyyy.

If you can see a link below, you may click this to open our service, otherwise please copy and paste the text into your Internet browser.

<https://xxxxxx/AdmissionsService>

#### Notification of your school place offer:-

When you made your application, we gave you a choice about the way your school place offer will be communicated to you on dd/mm/yyyy.

You chose to receive your school place offer via email.

Or

You chose not to receive your school place offer via email. It will be communicated to you by post.

To change your chosen method, please contact us using the contact details below.

Kind regards,  
Admissions Administrator  
IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT WILL NOT GO TO YOUR LOCAL AUTHORITY.  
TO CONTACT US, PLEASE SEE THE DETAILS BELOW:  
Contact Us by using the address on this email, or via [our website](#).

## Submission Confirmation (In Year Transfer Group)

Child's Name: Child Name  
Date of Birth: dd/mm/yyyy  
Dear Mr Online Applicant  
Thank you for submitting your application for a new school place, to start on <dd/mm/yyyy> or as close as possible to that date.

This paragraph is new text that has been defined for the Submission Confirmation email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Submission Confirmation parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Submission Confirmation memo for the transfer group.

You have expressed preferences for the following schools in this order of priority:

Rank	School Name	Address
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY
3	Preferred School 3	Bronze Avenue, Oneford, Oneshire ZZ1 1ZX

To login to your account and view the details of your application, please click here <https://xxxyyy/AdmissionsService>

If you are unable to open the online Admissions service when clicking on the link, copy and paste it into your web browser.

Kind regards,  
Admissions Administrator  
IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT WILL NOT GO TO YOUR LOCAL AUTHORITY.  
TO CONTACT US, PLEASE SEE THE DETAILS BELOW:  
Contact Us by using the address on this email, or via [our website](#).

## Reminder to Submit Newly Created Application

Dear Mr John Smith

Child's Name: Jenny Smith

Date of Birth: 13/08/2000

This paragraph is new text that has been defined for the Reminder to Submit Application email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Reminder to Submit Application parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Reminder to Submit Application memo for the transfer group.

If you can see a link below, please click it to open our service, otherwise please copy and paste the text into your Internet browser.

<https://xxxyyy/AdmissionsService>

Once logged in click the 'Submit Application Now' link on the Home Page. This will take you to the Terms and Conditions page, please make sure you click the 'Submit' button there.

To complete the submission, you will need to confirm that you accept our terms and conditions.

**Please note that you have n days to submit your Online Admissions Application Form. This online service will not be available after dd/mm/yyyy hh:mm.**

If you have posted a paper copy of the Application Form please disregard this reminder.

Kind Regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW

Contact Us by using the address on this email, or via [our website](#).

## Resubmitted Application Confirmation (Normal Phased Transfer Group)

Child's Name: Child Name

Date of Birth: dd/mm/yyyy

Dear Mr Online Applicant

Thank you for re-submitting your application for a school place.

This paragraph is new text that has been defined for the Submission Confirmation email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Submission Confirmation parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Submission Confirmation memo for the transfer group.

You have expressed preferences for the following schools in this order of priority:

Rank	School Name	Address
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY
3	Preferred School 3	Bronze Avenue, Oneford, Oneshire ZZ1 1ZX

If you wish to change the details of your application, you may do so by logging back into the School Admissions Service at any time until hh:mm on dd/mm/yyyy.

If you can see a link below, you may click this to open our service, otherwise please copy and paste the text into your Internet browser.

<https://xxxyyy/AdmissionsService>

**Notification of your school place offer:-**

When you made your application, we gave you a choice about the way your school place offer will be communicated to you on dd/mm/yyyy.

You chose to receive your school place offer via email.

Or

You chose not to receive your school place offer via email. It will be communicated to you by post.

To change your chosen method, please contact us using the contact details below.

Kind regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW

Contact Us by using the address on this email, or via [our website](#).

## Reminder to Resubmit an Edited (Previously Submitted) Application

Dear Mr Online Applicant

Child's Name: Child Name

Date of Birth: dd/mm/yyyy

Thank you for editing your application using the Online Admissions Application Service.

This paragraph is new text that has been defined for the Resubmission Reminder email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Resubmission Reminder parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Resubmission Reminder memo for the transfer group.

To complete the application you must log back in to the website and re-submit the application by dd/mm/yyyy hh:mm.

If you can see a link below, please click it to open our service, otherwise please copy and paste the text into your Internet browser. Once logged in click the Submit Application Now link on the Home

Page. This will take you to the Terms and Conditions page, please make sure you click the Submit button there.

<https://xxxyyy/AdmissionsService>

To complete the submission, you will need to confirm that you accept our terms and conditions.

Your application now states preferences for the following schools:

Rank	School Name	Address
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY
3	Preferred School 3	Bronze Avenue, Oneford, Oneshire ZZ1 1ZX

Kind regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW

Contact Us by using the address on this email, or via [our website](#).

**NOTE:** The lines "before <DD/MM/YYYY hh:mm>" and "You can continue to make changes to your application until <DD/MM/YYYY hh:mm>" do not show in the email if there is no **Closing Date** set for the transfer group.

If the applicant has not selected any preference schools, then the email is generated with the line "No preference schools selected" instead of the list of preference schools.

## Offer Email

Dear Mr Online Applicant

Child's Name: Child Name

Date of Birth: dd/mm/yyyy

Your child has been offered a place at **Preferred School 1**.

This paragraph is new text that has been defined for the Offer Information email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Offer Information parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Offer Information memo for the transfer group.

Rank	School Name	Address	Offer Status
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ	Place Offered
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY	Not offered
3	Preferred School 3	Bronze Avenue, Oneford, Oneshire ZZ1 1ZX	Not offered

You will need to respond to the offer, this can be done by clicking on the hyperlink below to respond to the offer information up until the closing date hh:mm on dd/mm/yyyy.

If you can see a link below, you may click this to login to our service, otherwise please copy and paste the text into your Internet browser.

<https://xxxyyy/AdmissionsService>

Thank you for using the <Local Authority> Online Admissions Application Service.

Kind Regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW

Contact Us by using the address on this email, or via [our website](#).

**NOTE: If Online Parent/Carer Responses have not been enabled (via Process | Transfer Groups | E-Applications Settings) then the paragraph about responding to the offer online does not show in the email.**

## Reminder to Respond to Offer

Dear Mr John Smith,

Child's Name: Child Name

Date of Birth: dd/mm/yyyy

This paragraph is new text that has been defined for the Reminder to Respond to Offer email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Reminder to Respond to Offer parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Reminder to Respond to Offer memo for the transfer group.

Your child has been offered a place at **Preferred School 1**.

This is a reminder that you can log into the admissions website by clicking on the hyperlink below to respond to the offer information up until the closing date (hh:mm on dd/mm/yyyy).

However, if you click the text below and it does not open the Online Admissions Service, please copy and paste it into your Internet browser.

<https://xxxyyy/AdmissionsService>

### OFFER INFORMATION

Rank	School Name	Address	Offer Status
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ	Place Offered
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY	Not Offered
3	Preferred School 3	Bronze Avenue, Oneford, Oneshire ZZ1 1ZX	Not Offered

Kind Regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW

Contact Us by using the address on this email, or via [our website](#).

## Offer Response Confirmation

Dear Mr Online Applicant

Child's Name: Child Name

Date of Birth: dd/mm/yyyy

Thank you for responding to our school place offer.

This paragraph is new text that has been defined for the Offer Response Confirmation email within the settings for the transfer group. If text is defined, it will appear in this place in the email and will replace the standard paragraph that appeared in this place in earlier versions of One. If the standard paragraph is required with no extra text, then the Offer Response Confirmation parameter should be left blank. If the standard text is required with some additional text, then both should be entered in the Offer Response Confirmation memo for the transfer group.

Your responses have been submitted as follows:

Rank	School Name	Address	Offer Status	Response
1	Preferred School 1	Gold Street, Oneford, Oneshire ZZ1 1ZZ	Place Offered	Accept
2	Preferred School 2	Silver Lane, Oneford, Oneshire ZZ1 1ZY	Not Offered	No response to make
3	Preferred School 3	Bronze Ave., Oneford, Oneshire ZZ1 1ZX	Not Offered	No response to make

If you have added in extra supporting text then this will be displayed below:

1 Preferred School 1

Please can you place my daughter on the waiting list for Grange Technology College as it is the school her older sister attends?

2 Preferred School 2

No supporting text recorded.

3 Preferred School 3

No supporting text recorded.

OR

No supporting text has been recorded against any preference.

If you wish to make a change to these responses please log back into the admissions website where you can change your responses until hh:mm on dd/mm/yyyy.

Kind Regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW

Contact Us by using the address on this email, or via [our website](#).

**NOTE:** The line "If you have added in extra supporting text..." is only included if at least one preference has supporting text recorded.

If there is no supporting text for any preference then the table of preferences and responses is followed by the line "No supporting text has been recorded against any preference."

## Change of Email Address

Dear Mr Online Applicant,

You have chosen to change your email address to access the Online Admissions Application Service.

In order to complete this process, you must login again using the password you have chosen.

If you can see a link below, you may click this to open our service, otherwise please copy and paste the text into your Internet browser.

<https://xxxyyy/AdmissionsService>

Thank you for using this service.

Kind regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW:

Contact Us by using the address on this email, or via [our website](#).



## Password Reset

Dear Mr Online Applicant,

You have chosen to reset your password, to enable you to login to the Online Admissions Service.

In order to complete this process, you must login again using the new password you have chosen.

If you can see a link below, you may click this to open our service, otherwise please copy and paste the text into your Internet browser.

<https://xxxyyy/AdmissionsService>

Kind regards,

Admissions Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY.

TO CONTACT US, PLEASE SEE THE DETAILS BELOW:

Contact Us by using the address on this email, or via [our website](#).

## Unable to Send Offer Emails (Admin Warning)

**Subject:** IMPORTANT - Unable to send Offer emails

**Body text:**

Although the Transfer Group Publicise Date has been reached it has not been possible to generate Offer Emails because the 'Publish Offer Statuses Online' routine has not been run.

Offer Scheme tab for the following Transfer Group(s):

<Transfer Group Year TG\_INFO.TG\_YEAR> - <Transfer Group Description - TG\_INFO.TG\_DESC>

Since the Allocation emails will only be generated where the system date matches the Transfer Group Publicise Date then after running the 'Publish Offer Statuses Online' routine please edit the Publicise Date to a future date such as tomorrow so that the Allocation emails are generated then. The Publicise Date is set via One | Admissions & Transfers | Tools | Module Administration | Transfer Groups | E-Application Settings. If you have any queries please contact the One Service Desk.

This email has been generated automatically.

## Appendix E – Removed In-Year Applications

The actions taken by One when an applicant closes an in-year application vary depending on the status of the application at the time of closure. This document illustrates how One processes closed applications at each stage of the application process.

### All Applications

The following actions apply to all removed applications, irrespective of status:

- The **Reason for Closure** specified by the applicant is stored with the application.
- The **Closed by Applicant** status field is set to True.
- The application's status is set to Inactive.
- The date and time of closure are stored with the application.
- Details of the application are written to the **Removed Applications** log.

### Application Status Scenarios

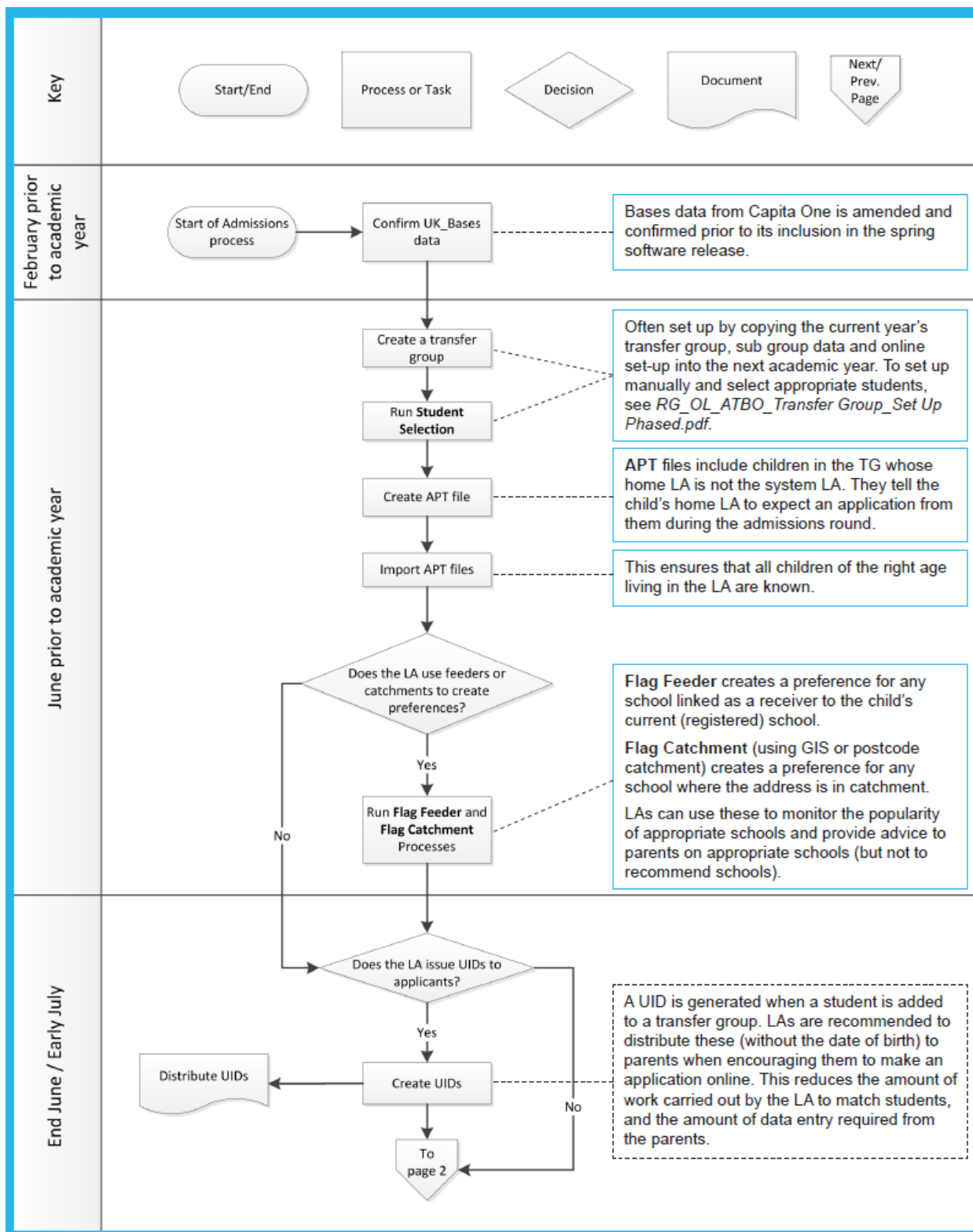
The table below illustrates the additional actions taken by One when an application in one of the listed scenarios is closed:

Scenario at Time of Closure	LA Status	Actions taken by One
Not submitted	LA knows nothing of the application at this stage.	The Closure Actioned status field on the application record is set to True. The Closure Action Review field on the Removed Application log is set to "Actioned automatically as not yet processed by LA".
<ul style="list-style-type: none"> <li>■ New application</li> <li>■ Submitted but not yet imported</li> <li>■ Child not matched or in conflict in B2B</li> </ul>	LA knows nothing of the application at this stage.	Child details (and applicant details if applicable) are removed from B2B. The application is deleted from the import queue. The <b>Closure Actioned</b> status field on the application record is set to True. The <b>Closure Action Review</b> field on the Removed Application log is set to "Actioned automatically as not yet processed by LA".
<ul style="list-style-type: none"> <li>■ New application</li> <li>■ Submitted but not yet imported</li> <li>■ Child automatched in B2B</li> </ul>	The application may have been seen by the LA, but no action has yet been taken.	The application is deleted from the import queue. The <b>Closure Actioned</b> status field on the application record is set to True. The <b>Closure Action Review</b> field on the Removed Application log is set to "Actioned automatically as not yet processed by LA".
Submitted and imported/in progress	The LA is actively dealing with the application.	The <b>Manual Closure Review Required</b> status field on the back office application is set to True. The <b>Closure Actioned</b> status field on the application record is set to False. The closure will be actioned at a later time when the LA has taken appropriate action on the back office application and marks the application as reviewed.
Submitted and either marked it as "Do not import" or marked it as inactive when processing multiple applications	The LA has effectively rejected the application.	The <b>Closure Action Review</b> field on the Removed Application log is set to "Actioned automatically as application rejected by the LA during the import process".

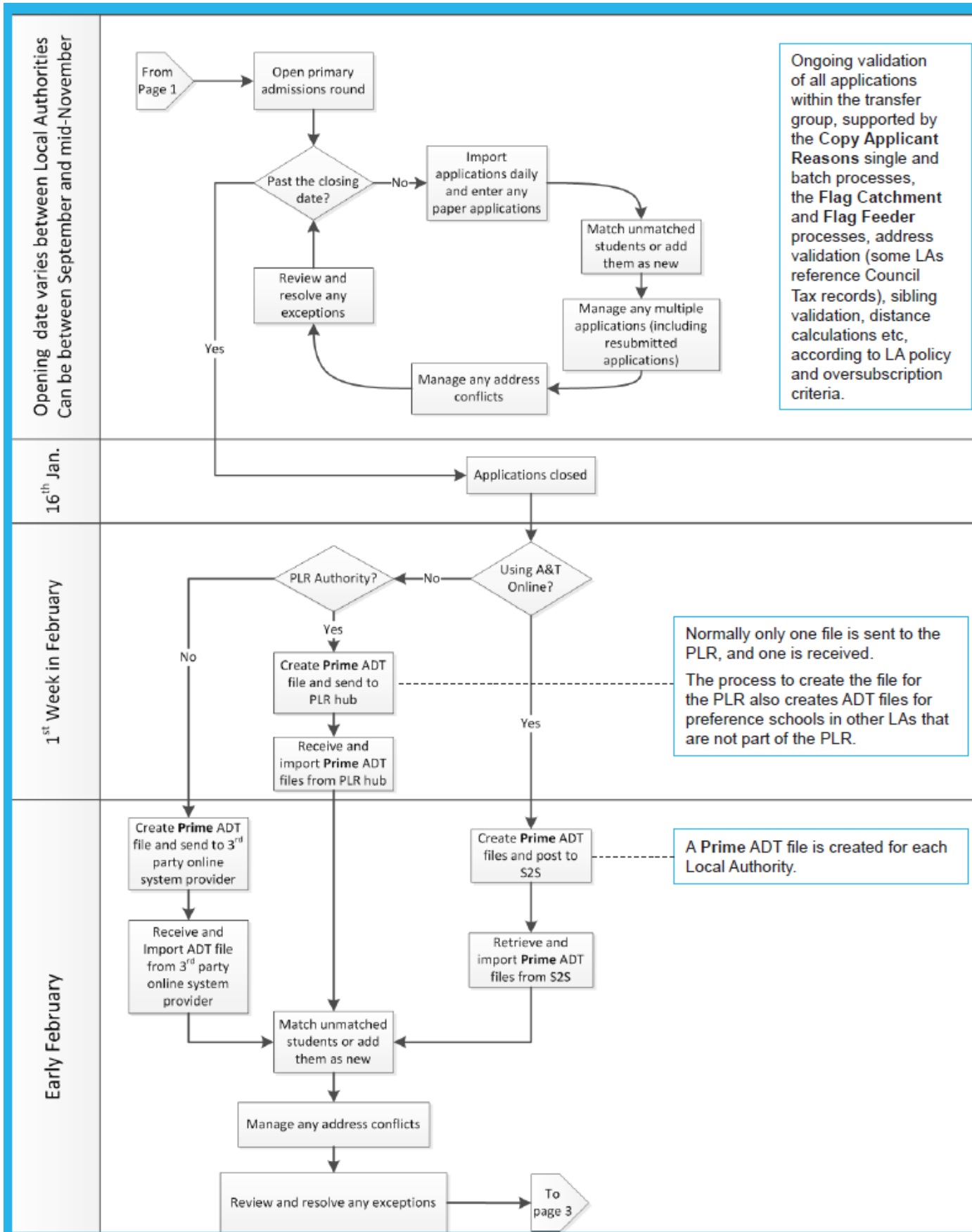
**Appendix E – Removed In-Year Applications**

		The <b>Closure Actioned</b> status field on the application record is set to True.
Back office application is closed	The LA believes it has dealt with the application.	The <b>Closure Actioned</b> status field on the application record is set to True.
		The <b>Closure Action Review</b> field on the Removed Application log is set to "Actioned automatically as Back Office Application has previously been closed by the LA".

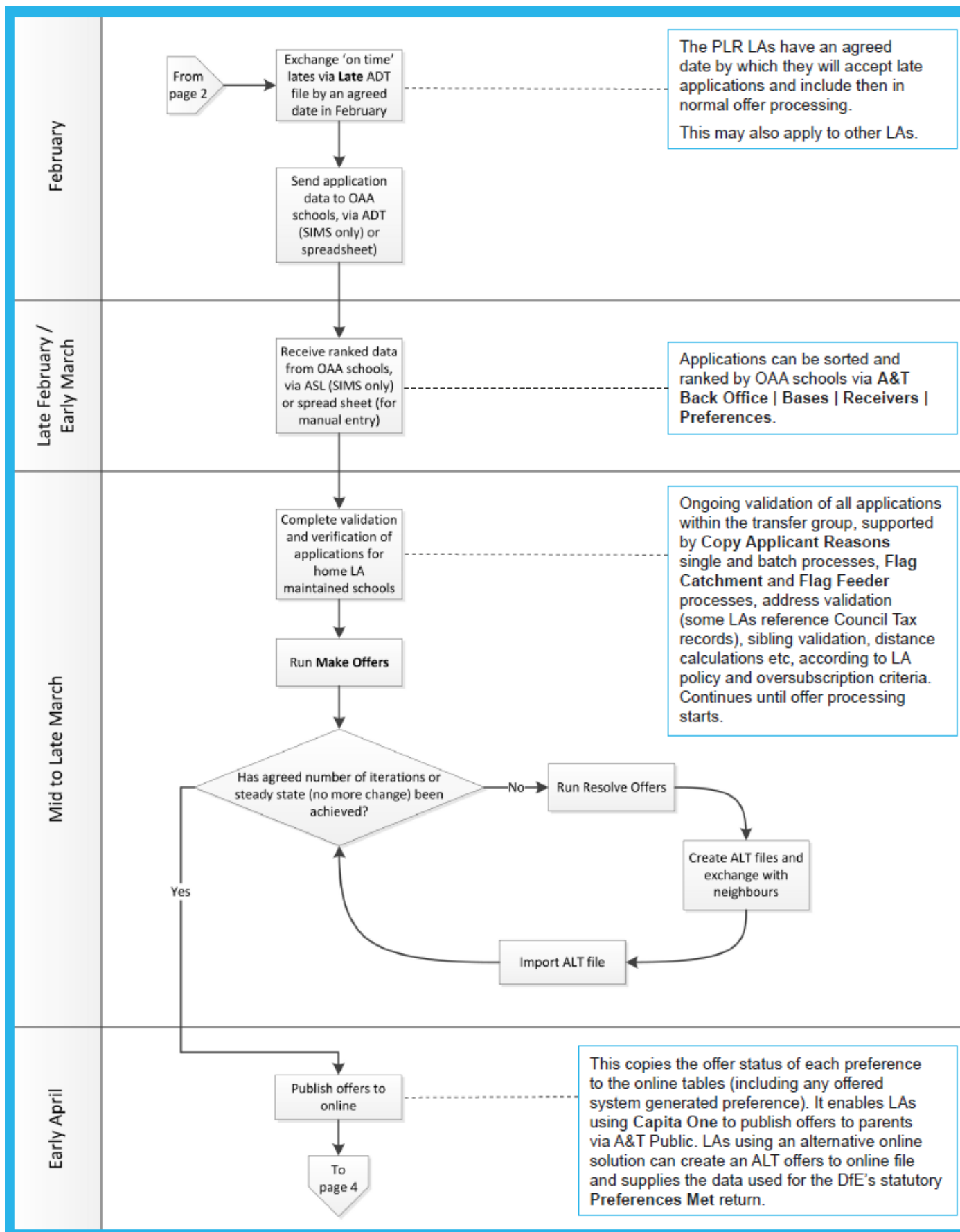
# Appendix F – Primary Phased Admissions Process Flowchart



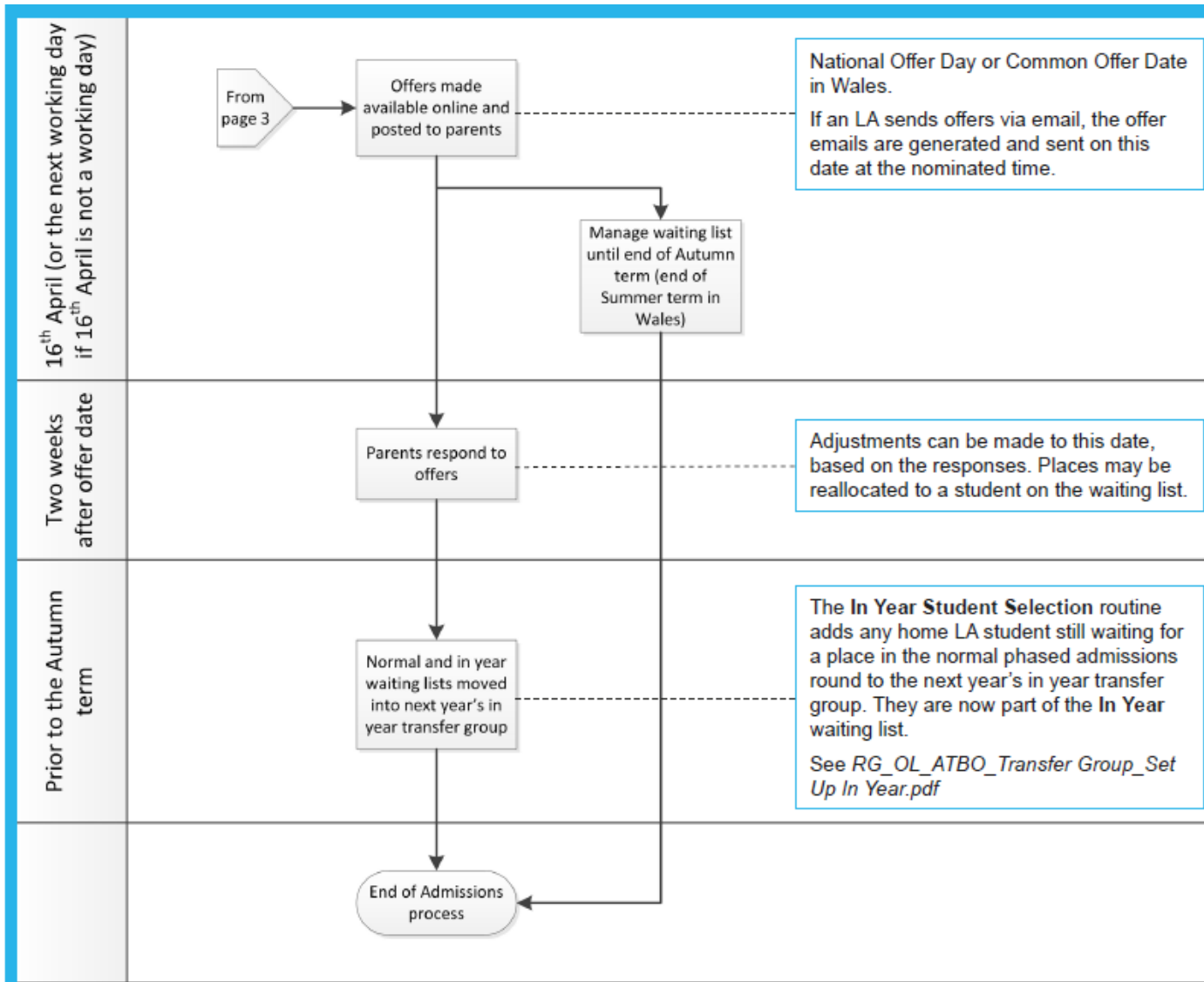
Appendix F – Primary Phased Admissions Process Flowchart



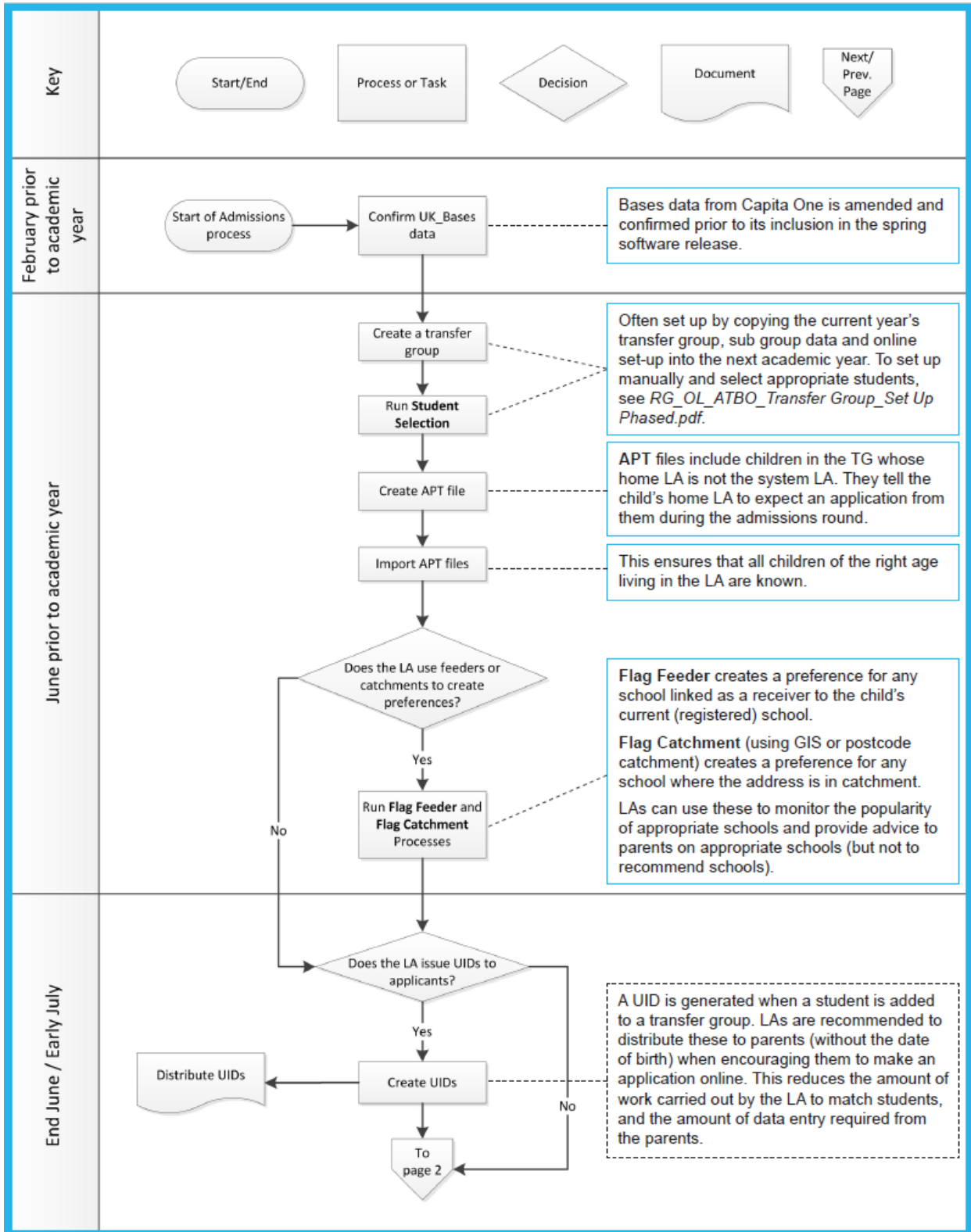
Appendix F – Primary Phased Admissions Process Flowchart



Appendix F – Primary Phased Admissions Process Flowchart

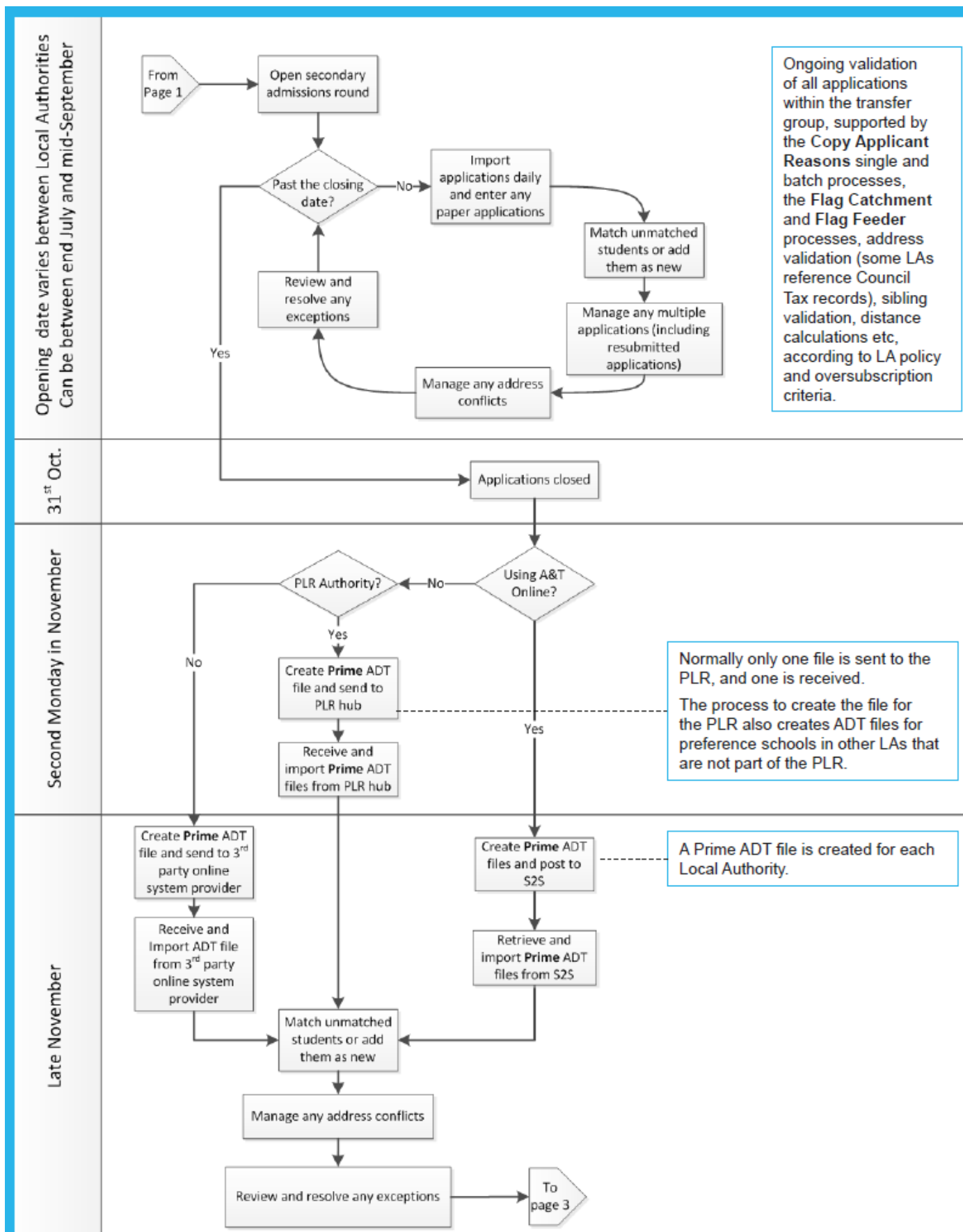


# Appendix G – Secondary Phased Admissions Process Flowchart

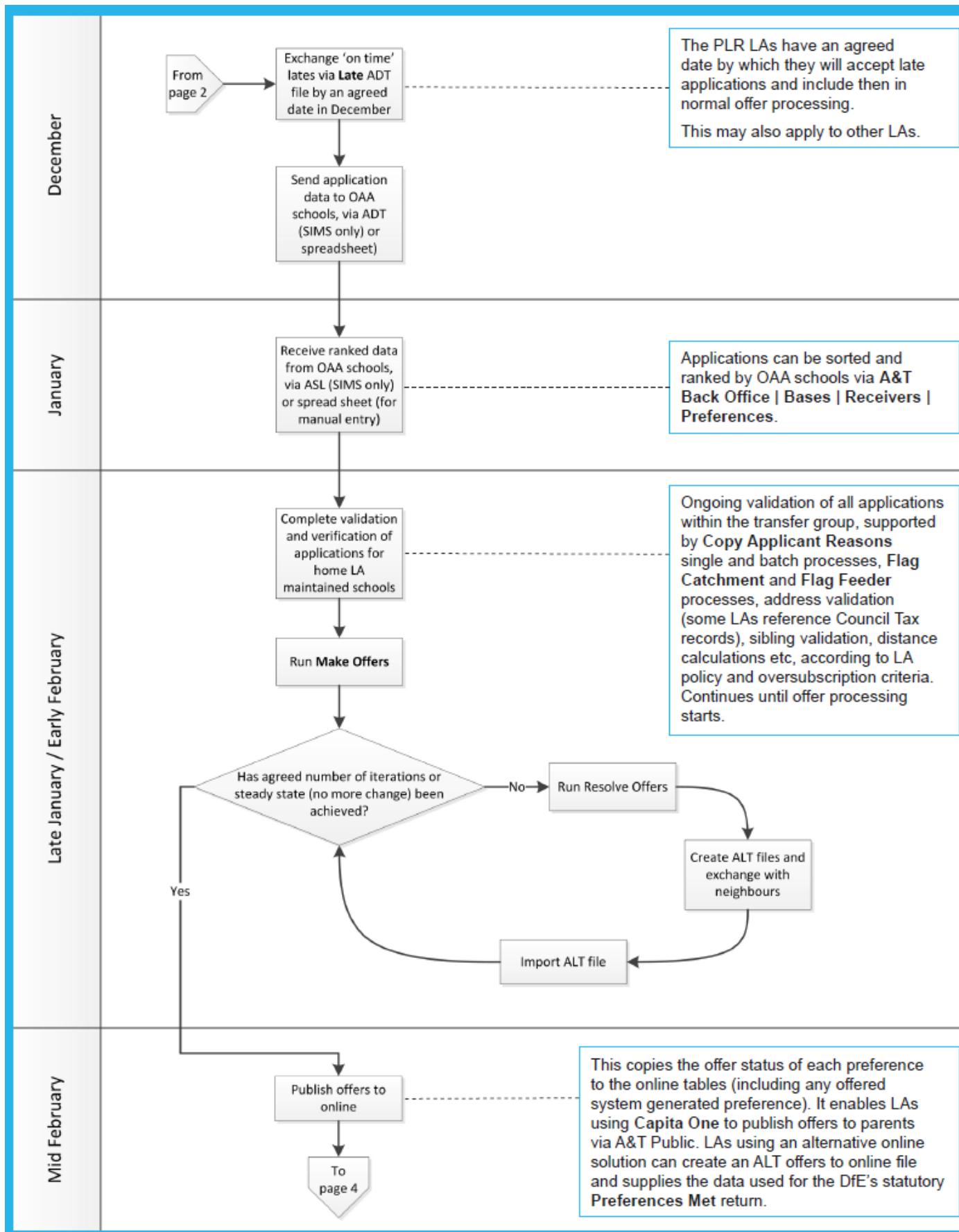




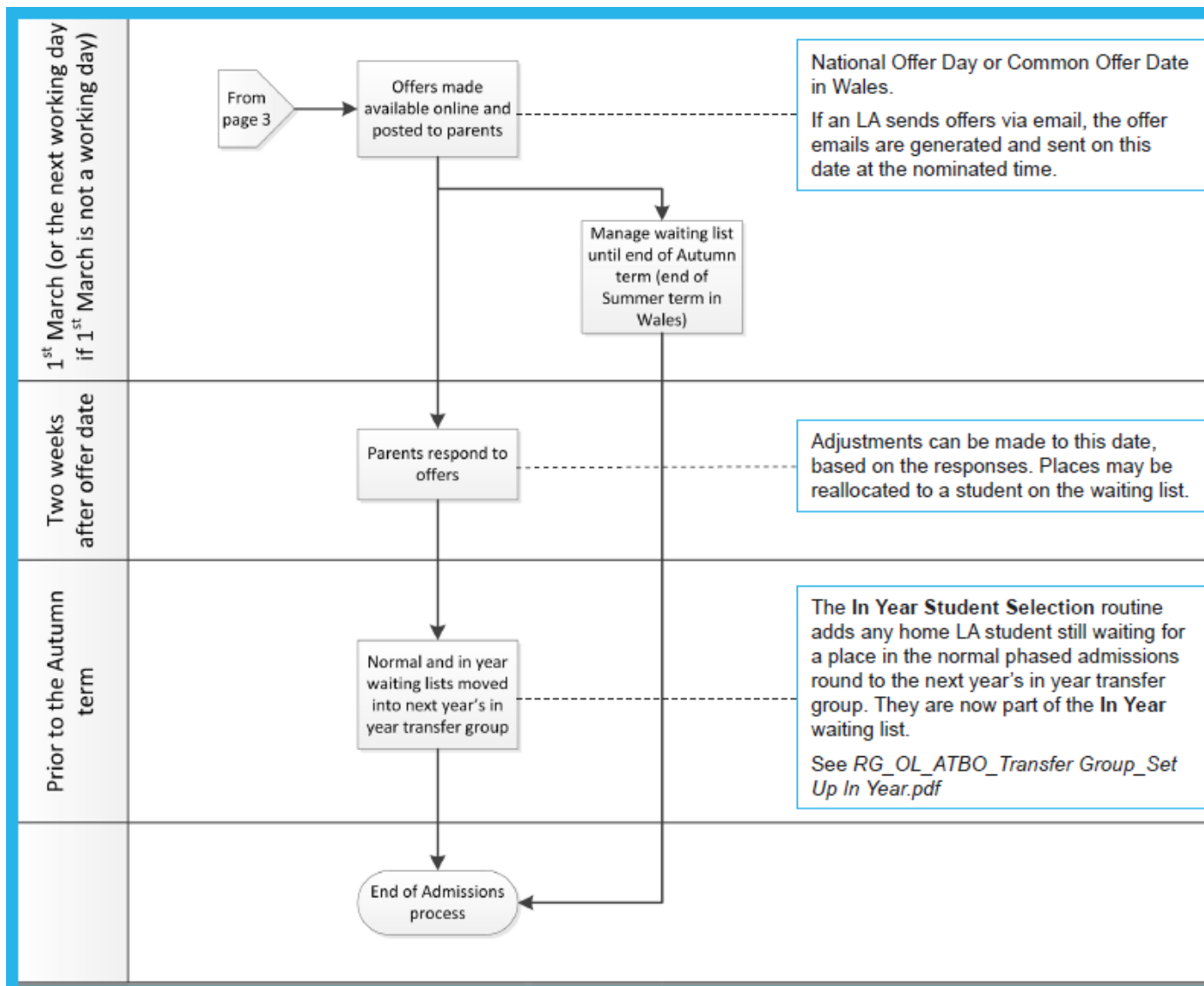
Appendix G – Secondary Phased Admissions Process Flowchart



Appendix G – Secondary Phased Admissions Process Flowchart



Appendix G – Secondary Phased Admissions Process Flowchart



# Glossary of Terms

## Admission Address

The address at which a student will be living when they attend their new school. This is the address upon which calculations are usually based. The admissions address is added to One when the first parental preference is added, either manually, by importing online applications, or by importing an ADT file.

In most cases the admissions address is the same as the current correspondence address. However, there are some exceptions, for example in the case of Returning Service or Crown Servant personnel.

## ADT

**Admissions Data Transfer** file. Sent from the Home Local Authority to Other Local Authority and Own Admission Authority (OAA) schools. Contains checked and verified information from the application form (i.e. data from the Applicant Reasons), including the **Address Verified** flag. ADT files cannot include any data fields other than those on the application form.

The **version number** (added automatically during the generation of the export file) is used for validation when the file is imported.

ADT files from normal phased admissions rounds can be distinguished from In Year ADT files in that for In Year files the 21st and 22nd characters, which represent the last two digits of the academic year of entry, have a value of 50 added to them (11 and 61 in the examples below).

Example Normal Phased admission file names:

- **Local Authority 933 to Local Authority 801:** 933LLLLL\_ADT\_801LLLLL\_11001.XML
- **Local Authority 933 to OAA School 4500:** 933LLLLL\_ADT\_9334500\_11001.XML

Example In Year file name:

- **Local Authority 933 to Local Authority 801:** 933LLLLL\_ADT\_801LLLLL\_61001.XML

## ALT

**Admissions Local Authority Transfer** file. Exchanged between Local Authorities. Contains the **offer status** (including offers, no offers and discards) of applications.

Offer statuses are usually sourced from the ADT file, although the ALT file may also include manually entered preferences for / from Other Local Authorities (OLAs), subject to the rules concerning application references. For further information on the rules governing application references, see the Rules Governing the Export of Application References topic of this Help file.

The ALT file exports those OLA students who are applying for a Home Local Authority school. It also includes banding information if relevant, and the rejections of OLA school offers to Home Local Authority students in cases where those offers are no longer required because of a higher-ranked offer.

When generated for the first time, the ALT file contains all OLA students who have Home Local Authority (HLA) preferences. On subsequent iterations, the file only includes preferences whose status has changed. ALT files are exchanged between Local Authorities as part of the **Resolve Offers** processes until the files contain no further changes.

Besides informing the Local Authority of application offer statuses, the ALT file also contains information concerning the following:

- Applications for which a previous offer is no longer required by the applicant because of a higher ranked offer (or, although it is unlikely, because the application has been withdrawn).

- Applications for which the applicant wishes to accept the offer.
- Applications for which the HLA does not wish to take up the offer of a place from an OLA because a higher ranked offer can be made by the HLA.

### **Online ALT**

The Online ALT is exported from One by Local Authorities that use an alternative admissions online software supplier, rather than making use of the One Admissions & Transfers Online functionality. The file feeds offer information to the LA's online software so that it can be published after allocations have been made.

The Online ALT is dependent upon receiving an ADT file from the other supplier's online system. However, the Local Authority does not necessarily need to belong to the PLR list of authorities.

The **version number** (added automatically during the generation of the export file) is used for validation when the file is imported.

ALT files from normal phased admissions rounds can be distinguished from In Year ALT files in that for In Year files the 21st and 22nd characters, which represent the last two digits of the academic year of entry, have a value of 50 added to them (11 and 61 in the examples below).

Example Normal Phased admission file names:

- **Local Authority 933 to Local Authority 801:** 933LLLL\_ALT\_801LLLL\_11001.XML

For the Online ALT only, the Source LA (characters 1-3) and Destination LA (characters 13-15) are the same.

Example In Year file name:

- **Local Authority 933 to Local Authority 801:** 933LLLL\_ALT\_801LLLL\_61001.XML

### **Application Reference**

An Application Reference is created when an applicant's preference (i.e. a preference that is not a system-generated preference) is added to One. Application references must be unique within the transfer year.

Application references take the format **LAN-YYYY-MM-N-999999**, where:

**LAN** is the **Local Authority Number** for the authority that is receiving the application. This is the student's Home Local Authority.

**YYYY** is the academic year of entry. For automatically generated reference numbers this is taken from the Transfer Group Year (*TG\_INFO.TG\_YEAR*).

**MM** varies depending on whether the application is normal phased or in year:

- For normal phased admissions, MM is the usual month of entry for that academic year - One currently uses 09 (i.e. September), but this value can be edited via the Application Details tab if necessary.
- For in year transfer groups, MM is the month in the Application Entered field, plus 50. The DfE has specified that 50 is added to the number of the month so that in year applications can be distinguished from normal phased admissions.

For example, if the Application Entered date was 01/02/2012, then the month component would be 02 + 50 = 52. If the Application Entered date was 10/11/2012 then the month component would be 11+50 = 61.

**N** is an indicator to show the origin of the unique reference. It can take the values **E** (Online), **K** (Keyboard), and **B** (Batch).

For in year transfer groups, application reference numbers are generated in the following ways:

- Adding preferences manually.
- Carrying over applications as part of the In Year Student Selection process.
- Exporting an ATF file.

In each case, the N component is K.

**999999** is a unique serial number with leading zeros.

Each application can only have one Home Local Authority.

For applications prior to September 2005, there was no indicator of origin. In these cases the format was **LAN-YYYY-MM-999999**.

## APT

**Admissions Pre-Transfer** file. A file enabling Local Authorities to notify each other of students who attend their own schools but who live in another Local Authority, prior to contacting parents at the beginning of the admission process.

The data transferred in the APT file is used to communicate with parents, ensuring that they apply to their home Local Authority rather than the school's Local Authority. This in turn ensures that any applications for admission are received by the Home Local Authority.

The APT file contains a listing of students attending schools in the Local Authority whose Home Local Authority is different to the default Local Authority (i.e. that for which the One system was set up). The file includes their current school details.

One file is produced for each LA to which students belong.

For example, a student living in Bedfordshire but attending a school in Milton Keynes would be included in an APT file from Milton Keynes Local Authority to Bedfordshire Local Authority because of the difference between the student's Home Local Authority number (the number of the Bedfordshire LA) and the **Default Local Authority** set in **Tools | System Administration | LA Defaults** in One v3 (the number of the Milton Keynes LA).

The **version number** (added automatically during the generation of the export file) is used for validation when the file is imported.

Example file name:

- Local Authority 935 sends APT file to school 4707 within LA 933 for academic year of entry 20012/13: 935LLLLL\_APT\_9334707\_12001.XML

## ASL

**Admissions School to Local Authority Transfer** file. Sent from an OAA (Other Admission Authority) School to the Home (maintaining) Local Authority.

The ASL file contains ranked student lists from OAA Schools, including the reasons for rank for the applications sent to the school by the Local Authority in the ADT file.

The lists include information on the following:

- Students to whom an offer can definitely be made.
- Students who may be offered places subject to places being available.
- Students to whom an offer can definitely not be made.

If an OAA School is using banding, then there are separate ASL files for each band.

The **version number** (added automatically during the generation of the export file) is used for validation when the file is imported. If the file is not of the current version then an error message is generated and the file is not processed.

Example file name:

- **OAA School 4500 to Local Authority 933:** 9334500\_ASL\_933LLLL\_09001.XML

## ATF

**Admissions Transfer File.** Sent from a Local Authority to the schools in that Local Authority. The ATF file contains details of students to whom offers will be made. The file is in the same format as the CTF file (Common Transfer Format file) except that:

- An ATF file may not contain a UPN (Unique Pupil Number) if the student either does not currently have one or the number is not known to the sending Local Authority.
- ATF files must contain an application reference number.
- ATF files do not include containers for assessment (attainment) or attendance information. When a file is created in March, it does not include any Key Stage 2 data. Any attendance data only relates to the period up to the date that the file is created.
- The contacts included in the ATF file are restricted to the applicant (the person who applied for the school place) as the first contact (or equal first) and then any contact from the Local Authority database who has parental responsibility.

The ATF file also exports active SEN assessment involvements for those Local Authorities that use SEN v4.

This file may be generated as many times as required if there are changes to the list of students.

The **version number** (added automatically during the generation of the export file) is used for validation when the file is imported. This number will not increment automatically if the file is downloaded by schools via the School Admissions Portal.

The file may be downloaded directly by schools from the School Admissions Portal for Primary, Secondary and In Year Transfer Groups. This can be enabled by setting a new permission.

Example file name (ATF):

- **Local Authority 933 to School 4500:** 933LLLL\_ATF\_9334500\_05001.XML

## Conflict

A “suspended state” that imported data is put into when One can not match the incoming details with an equivalent One record. An officer must subsequently resolve the conflict manually.

## Correspondence Address

A contact address for the applicant, used when the applicant does not live at the admission address.

For example, the child might live at address A, but be scheduled to move to address B before starting at their new school. In this case, address A would be used as the correspondence address until the day of the move, while address B would be used as the admission address.

## E-Application

An application made online (i.e. either via A&T Online or the Citizen Portal).

## Edit Rank

See OAA.

## EOTAS

**Educated Other Than At School.** A child who is educated at an establishment that is not a school, for example at home or in a Pupil Referral Unit. Used by Welsh Local Authorities only.

## HLA

**Home Local Authority.** A person’s Home Local Authority is the LA in whose jurisdiction they live.

## Import Base

The base to which students who are imported via ADT without a current base are assigned. For example, a student who is transferring from an Independent Primary school to a Maintained Secondary might fall into this category.

## LLPG

**Local Land and Property Gazetteer.** A database of addresses, maintained by an LA. Feeds into the National Land and Property Gazetteer, a central database of all LLPGs.

## No Application Base

The base to which students who do not have a current school, or whose current school is not listed as a feeder for the transfer group are assigned.

## No Offer Base

The base to which the Make Offers process assigns those pupils who have expressed a preference but who still have no allocated school place.

## OAA

**Own Admission Authority.** A foundation, voluntary aided or academy base within the Home Local Authority that is normally responsible for its own admissions. The **Edit Rank** check box on the **Sub Group Details** should be selected for these bases.

## OLA

**Other Local Authority.** Any Local Authority that is not the HLA.

For example, suppose that an applicant living in Bedfordshire makes an application to a school in Milton Keynes. In this case, the Bedfordshire LA (who the applicant makes the application to) is the HLA, and the Milton Keynes LA (who are notified of the application by the HLA) is an OLA.

## PAF

**Postcode Address File.** A database listing valid UK postcodes and Post Office delivery points.

## PAN

**Published Admission Number.** The intake for a specific school and academic year (not to be confused with the Pan-London Register or PLR).

## PAON

**Primary Addressable Object Name.** This is part of the BS7666 Address Format (a British Standards Institute format for addresses).

The National Land and Property Gazetteer (NLPG) defines PAON is as follows:

A Primary Addressable Object Name (PAON) is the name given to an addressable object that can be addressed without reference to another addressable object, for example a building name or street number.

A PAON can hold both numeric and character data.

During export, if there is no PAON but there is a SAON then the SAON is exported as the PAON. However, if both a PAON and SAON exist then both tags are populated.

If there is no SAON or PAON for a particular student then the address is exported in Address Line format.



## PLR

**Pan London Register.** The Pan-London Coordinated Secondary Admissions System is a centralised pupil admissions and transfer system for London Boroughs and some neighbouring Local Authorities, using XML Schemas. One Admissions and Transfers has been designed to ensure that the vast majority of children are offered a single secondary school place.

The data flow between the A&T module and the PLR only involves sending data that is relevant (i.e. any out-of-borough information).

## Process Period

Process periods define the start and end time of the mini application rounds that are used to process in year admissions. They are configured via the **Process | Transfer Groups | In Year** tab.

## Publicise Date

The date that offers are published online and applicants are emailed to notify them of the offered school.

## Pupil Premium

The Pupil Premium is an addition to main school funding, intended to support children from low income families. It is allocated to schools each year for every student who fulfils at least one of the following criteria:

- Currently eligible for free school meals (FSM).
- Has been eligible for FSM at any point in the last six years.
- Has been looked after continuously for more than six months.

## SAON

**Secondary Addressable Object Name.** Part of the BS7666 Address Format (a British Standards Institute format for addresses).

The National Land and Property Gazetteer (NLPG) defines SAON as follows:

A Secondary Addressable Object Name (SAON) is given to any addressable object that is addressed by reference to a PAON, for example "First Floor".

A SAON can hold both numeric and character data.

During export, if there is no PAON but there is a SAON then the SAON is exported as the PAON. However, if both a PAON and SAON exist then both tags are populated.

If there is no SAON or PAON for a particular student then the address is exported in Address Line format.

## S2S

**School 2 School.** Originally set up for inter-school transfer, but its remit has now been widened to enable LAs to upload and download admissions files for Other Local Authorities (OLAs) and Own Admission Authority (OAA) Schools.

## UID

**Unique Identifier.** A number used to identify a specific application within Admissions and Transfers Online. This is a Capita One specific reference and is not used in any transfers of information to other authorities.

UIDs are automatically generated by One when students are added to transfer groups, either via the Student Selection routine or manually.

In order for UIDs to be used by a parent or carer in an application, they must be distributed via the process on the **Tools | Manage E-applications | Distribute UID** tab page in A&T v3. Once the parent/carer has received notification of the UID, they can use it to apply via A&T Online. Using a UID pre-fills some of their child's details and helps to ensure that the parent is applying to the correct transfer group.

### **Withdrawn Base**

The base to which students who have withdrawn from the procedure (in **Students | Application Details | Withdrawal Details**) are allocated by One. Withdrawn bases are defined in the same way as dummy bases (i.e. the No Application and No Offer bases).

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