School Access Module (SAM)
User Guide

Contents:

General Information

The Schools Access Module (SAM) supports in- year and transitional round applications for all schools within the borough, and ensures that information can be shared in a secure manner without the need for emails and spreadsheets containing sensitive data.

SAM also ensures that the local authority meets its duty under the School Admissions Code which states that the admissions team must confirm number of places available in response to enquiries within 2 school working days. The benefit of having accurate and current information via the portal is that the team do not have to contact schools (other than AA schools) to confirm places prior to offering or declining a place.

Alongside duties as required by the School Admissions Code, the Children Missing in Education guidance states that all schools must notify the local authority, within **five days** of a pupil joining the register; this can be met by completing the On-Roll Date indicator within SAM.

For schools, SAM offers access to preference data, allocations and for those schools who are their own admission authority allows the ranking of applications as they are submitted in order to ensure that school places are offered in line with oversubscription criteria and that waiting lists are also maintained in the correct order.

In addition, SAM allows schools to:

- View all applications made to their school (without the Preference rank)
- View/download details of all offers made
- Select individual pupils for more detailed information
- View a list of applicants whose application has been withdrawn/discarded/declined etc.
- View their waiting lists
- See if a current pupil applies for another school
- Verify certain data (e.g. sibling application, addresses)
- Export data to Excel and manipulate
- Export lists into school's own data system using ATF Export facility

AA schools who process their own appeals can also rank and maintain their waiting lists through SAM.

For community and voluntary controlled schools, applications are ranked using rules which are set up by the Local Authority. These rules are in line with the determined admissions oversubscription criteria and is applied to all school applications before the allocation process begins. Data is live and once saved, it can be seen by both the school and the Admissions Team.
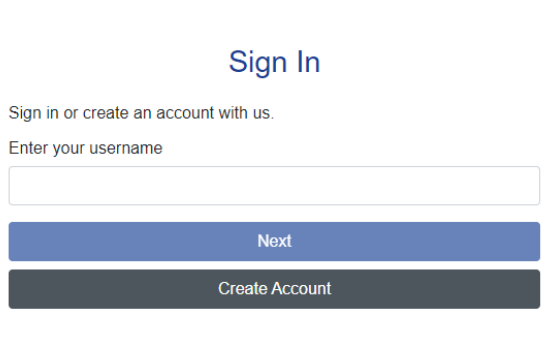
Illustrations

Any Screenshots in this guide are intended as a representation of what you may see on screen. Because of the ability to customise the terminology and display settings used in the application, there may be some difference between what is shown in the guide and what you see on your screen.

Logging In

You will firstly need to request a username and password from your Admissions Caseworker. These are case sensitive.

To log in please follow the link below (it will be worth saving this to your favourites).

Sign In - Synergy (telford.gov.uk)

On your first login you will be prompted to change your password. If you forget your password or get locked out, please contact your caseworker who will reset your password for you.

Your first screen should display the name of your school in the top right of the screen, if it does not appear or is not the correct school, please contact your caseworker immediately.

You will then be presented with the following screen – you need to ensure your school name appears in the Select a School field and then click on the admissions button.

From here you will be able to select either of the following buttons

⚙ Round Management

This screen provides an overview of all current, open rounds for your school. You will see the following displayed.

- Published Admission Number (PAN)
- Attendance Count – No. of children currently on roll.
- No. of places available – usually equivalent to your PAN unless another no. has been agreed with the LA.
- No. of places offered/accepted
- No. of places withdrawn/declined – this includes preferences withdrawn.
- Your current vacancies
- No. of appeals - this includes all appeals for that round, not just pending appeals.
- In year – confirms the type of round (in year or transitional)
- Attendance Count Modified Date/Time
- Attendance Count Modifier – (school staff or an admissions officer).

The only data that can be updated by a schools user is the attendance count. To do this you will need to click the ✏ button on the left hand side. This allows you to enter your number on roll in the appropriate cell. Use the 💾 button to save your data. It is important that you update your numbers on a regular basis, so if the number on roll has remained the same for a long time, change the number to one that isn't correct, save it then go back in and save again with the correct number. This helps the admissions team to know that they data is current.

Round Management

To edit a round, click the edit icon and update the required field(s).
The only fields that can be updated are: **Attendance Count** and **No. of Places Available** (Depending on Round Permissions).

| | Display In Year Rounds ☑ | Sort By Round Title ☐ |

	Round	Band	Band Hierarchy	Lock Band	PAN	Attendance Count	No. of Places Available	No. of Places Requested	No. of Places Offered / Accepted	No. of Places Offered / Accepted but not yet on roll	No. of Places Withdrawn / Declined	Vacancies	No. on Waiting List
	Reception Place 2022/23			No	60	0	60	0	0	0	0	60	0
✎	In Year Transfer Year 3 2021/22			No	60	55	60	0	1	1	0	4	0
✎	In Year Transfer Year 2 2021/22			No	60	69	60	0	0	0	0	-9	0
	21/22 Yr 1 In Year			No	60	0	0	0	0	0	0	0	0

Important: Ensure you update the attendance count correctly because School Admissions will allocate places according to this number.

	Round	Band	Band Hierarchy	Lock Band	PAN	Attendance Count	No. of Places Available	No. of Places Requested	No. of Places Offered / Accepted	No. of Places Offered / Accepted but not yet on roll	No. of Places Withdrawn / Declined	Vacancies	No. on Waiting List	No. of Appeals	In Year	A M D
	Reception Place 2022/23			No	60	0	60	0	0	0	0	60	0	0	No	
✎	In Year Transfer Year 3 2021/22			No	60	55	60	0	1	1	0	4	0	0	Yes	2
💾 ✖	In Year Transfer Year 2 2021/22			No	60	0	60	[69]	[60]	0	0	0	0	-9	0	0	1	2
	21/22 Yr 1 In Year			No	60	0	0	0	0	0	0	0	0	0	Yes	0

Data is live therefore once you click save School Admissions will be able to see your updated numbers.

The Round management screen acts as your overview of each round and alerts you to specific round that may need action.

In the example below, you will see that the round "In Year Transfer Year 4" has a total of 3 places requested, 5 places have been offered and all 5 of those have not yet gone onto the school roll.

Before the attendance count field is updated, the round summary page will need to be amended to reflect the start date of any new admissions. Once this is complete, then you can return to the Round Management page and update your attendance count. By doing this it will ensure that your vacancies column is accurately updated taking into account the new starters and any offers made but not yet taken up.

Round Management

o edit a round, click the edit icon and update the required field(s).
he only fields that can be updated are: **Attendance Count** and **No. of Places Available** (Depending on Round Permissions).

Display In Year Rounds ☑   Sort By Round Title ☐

	Round	Band	Band Hierarchy	Lock Band	PAN	Attendance Count	No. of Places Available	No. of Places Requested	No. of Places Offered / Accepted	No. of Places Offered / Accepted but not yet on roll	No. of Places Withdrawn / Declined	Vacancies	No. on Waiting List	No. of Appeals	In Year
	Reception Place 2023/24			No	40	0	40	2	32	32	22	8	0	0	No
	Reception Place 2022/23			No	40	0	40	0	29	29	19	11	0	0	No
✎	In Year Transfer Year 5 2022/23			No	40	39	40	3	0	0	1	1	2	1	Yes
✎	In Year Transfer Year 4 2022/23			No	40	33	40	3	5	5	4	2	0	0	Yes
✎	In Year Transfer Year 3 2022/23			No	40	39	40	1	4	4	5	-3	0	0	Yes
✎	In Year Transfer Year 2 2022/23			No	40	35	40	0	4	4	1	1	0	0	Yes
✎	In Year Transfer Year 1 2022/23			No	40	32	40	1	6	6	2	2	0	0	Yes
✎	In Year Transfer Year 6 2022/23			No	40	39	40	1	1	1	3	0	1	1	Yes

In the illustration above, you will see that for the In Year Transfer Year 4 Round there are 5 children who have been offered a place but are not yet marked as on roll. In line with the Children Missing Education Guidance 2016, schools must enter the day on which the school has agreed, or been notified that the pupil will attend the school. The round summary section explains how to do this.

Round Summary

From the home page, click into the Admissions Round field and you can then select your round from the picklist then click on Round Summary.

Admissions

Here you can view, manage and rank admissions applications. To view applications, use the drop down list below to select the Admissions Round, then press the Round Summary button.

Select a school:

Aqueduct Primary School ⬍

Admissions Round:

[ ] ⬍

22/23 Reception In Year Transfer
In Year Transfer Year 1 2022/23
In Year Transfer Year 10 2022/23
In Year Transfer Year 11 2022/23
In Year Transfer Year 2 2022/23
In Year Transfer Year 3 2022/23
In Year Transfer Year 4 2022/23
In Year Transfer Year 5 2022/23
In Year Transfer Year 6 2022/23
In Year Transfer Year 7 2022/23
In Year Transfer Year 8 2022/23
In Year Transfer Year 9 2022/23
Infant To Junior Place (2022/23)
Junior 23 Ehco Allocation
Infant To Junior Place (2023/24)
Middle To High School Transfer (September 2023)
Reception Place 2022/23
Reception Place 2023/24
Secondary Place 2022

Round Summary

Preference Statistics ✓

Total Applications: 8	On Waiting List: 1	Total Withdrawn: 1
Preference 1: 1 12.5% 🔍	Preference 1: 1 100% 🔍	Preference 2: 1 100% 🔍

Applicants	Files	Reports
Performing an applicant query allows you to see a list of applicants to your school and rank them according to your admissions criteria.	Import and export files.	Predefined reports and adhoc querying.
≣ View Rankings ≣ View Indicators/On Roll Date	⬆ Import Rankings	🌐 View Withdrawals 🗺 Query Preferences

To update the pupil start date click on the View indicators/On Roll date button, select on roll date as below

and then use the [✎] button against the relevant child from the list to edit the start date. This should be completed within 5 days of the child joining the school.

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Once this has been completed, return to the round management screen and update your attendance count.

You can return to the home page and select a different round by pressing the Home button in the top left corner.

Other features of the Roundy Summary Page:

Preference Statistics: displays data regarding the number and rank of preferences you have received for the year group. This can be useful for a school who wish to gauge the interest in their school and for possible financial planning and is viewed as a nice interactive doughnut graph for a clearer understand of the breakdown.

Applicants: allows all schools to view the applications in detail for their school. It is also for own admissions authority schools to rank using their own subscription criteria.

Files: for importing and exporting data. Schools can, once they have permission to view their Final Offer List, export an ATF or CTF file, which in turn can be imported into the schools own database.

Reports: used to produce various reports all of which can be exported to Excel should you wish to manipulate data or produce mailing lists.
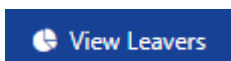
 This is a list of students where an application to attend another Telford and Wrekin School has been submitted.
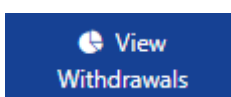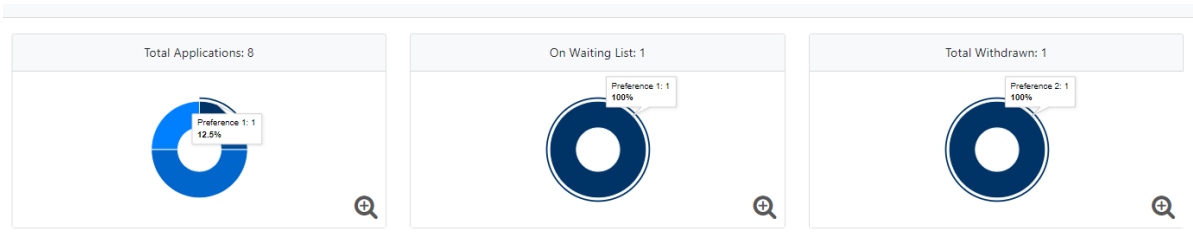
 A list of applicants, having previously applied to your school, but no longer wish to be admitted.
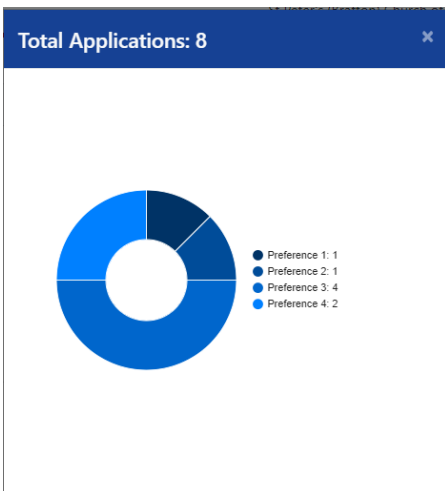
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Query Preferences   A summary of all applications, pending, waiting list and withdrawn.

Preference Statistics

(This information is automatically updated as applications are imported from the Parent Portal by the Local Authority)


 Clicking on the button in the bottom left of your chosen option will expand the statistics.

This screen shows how many applications have been received for this school.

Total Applications on Waiting List.

If you expand the Waiting List tab, it will provide statistical information about the applicants on the waiting list. At the beginning of the transitional rounds all applicants will display on this list.

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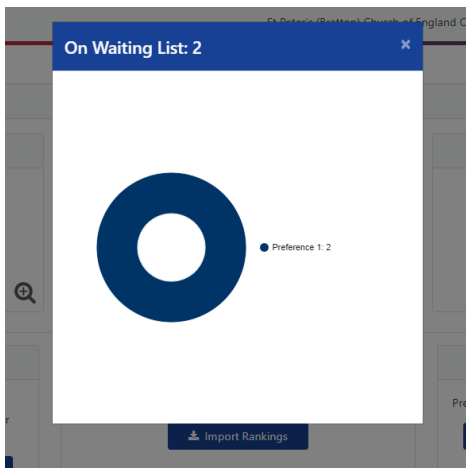
Total Withdrawn Applications.

The final part of this section shows applications that have been withdrawn. This shows the movement of the applicants during the allocation process.
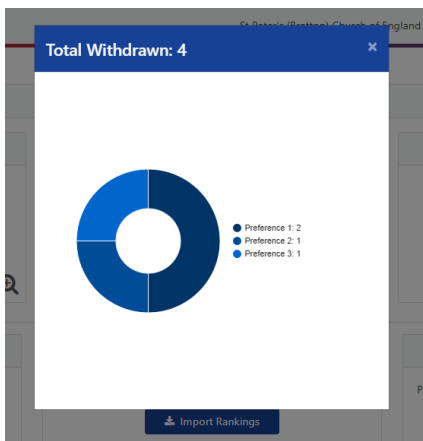
Transitions – Primary and Secondary rounds

The following module will explain how to use and navigate SAM when using it for the Primary, Junior and Secondary transition rounds.

Indicator Checks (sibling and staff)

Both rounds open in early September. The secondary round closing date is **31st October** and the Primary round closing date is **15th January**. All applications for children with an **EHCP should also be submitted by 31st October**. Applications received after these closing dates will be considered as late and will not be considered until all on time applications have been allocated.

Schools will be able to view their transition applications and can start to confirm those children who have a staff or sibling claim as their preference reason.

To view these claims, once logged on please select the relevant round 'Reception 24/25', 'Infant to Junior Place 24/25' or 'Secondary 24/25' and click the round summary button.


This will direct you to the Round Summary Page where you can view **Preference Statistics.**
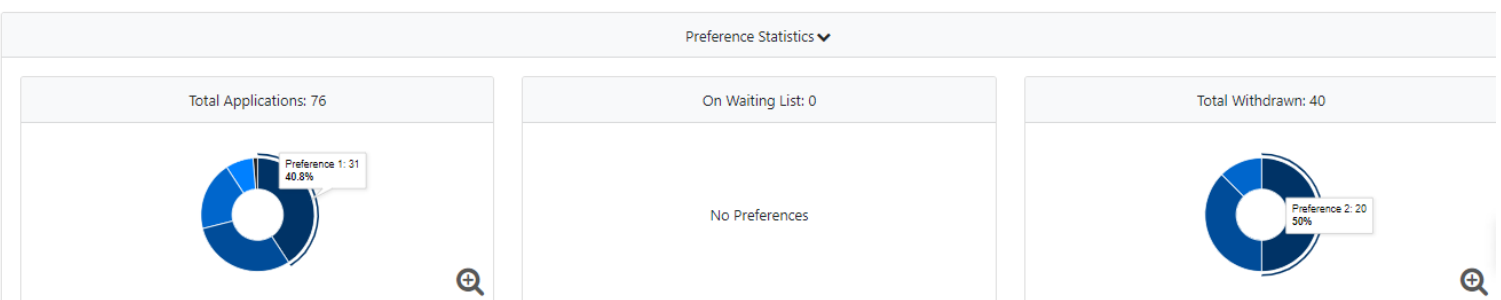

Schools can view the total number of applications they have received for the round, including how many 1st preferences. For more detail about preference data, click on the magnifying glass to view total applications.

Prior to National Offer Day, schools will also be able to view the total number of applications that have been withdrawn. These may be because they have been offered a higher preference, or have been withdrawn due to no longer requiring a school place in Telford and Wrekin. It should be noted that before the closing date, only applications for residents within the borough will be visible as application files from other LA's do not arrive until after the closing date.

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To view the pupil indicators, click on 'View Indicators'.
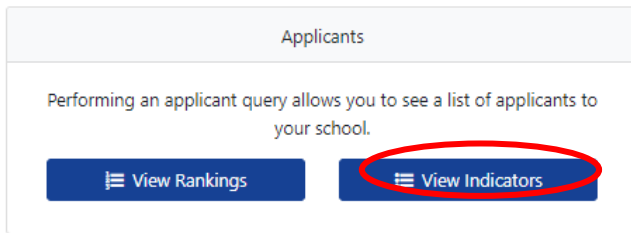
To view the sibling indicators, click on the sibling radio button on the left of the page and click search. When you want to check staff claims, you do the same by selecting the staff radio button.
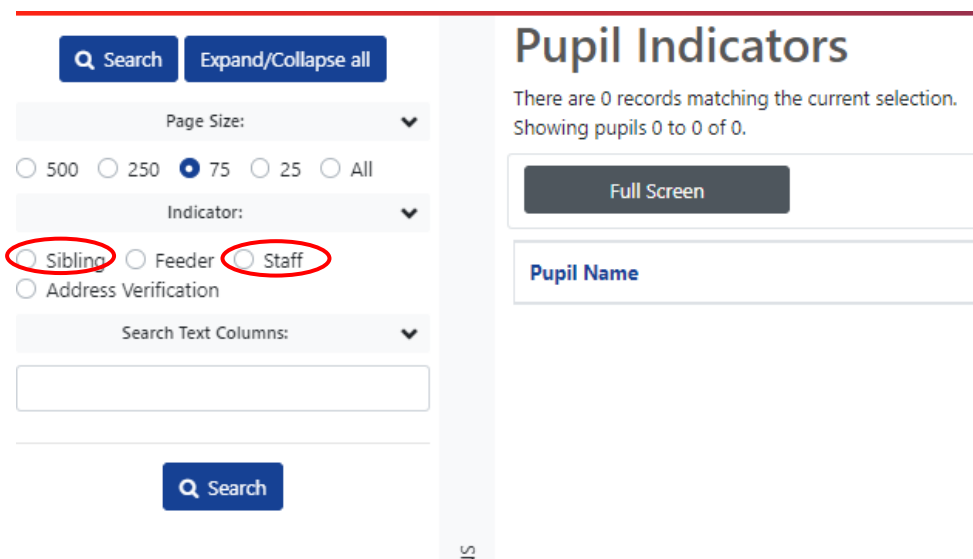
The screen will refresh and only the pupils who have informed the Local Authority that they are applying using the sibling/staff criteria will be shown on the list. The default setting for all records at this stage will be N/D (indicating no decision has been made).

Pupil Indicators

There are 21 records matching the current selection.
Showing pupils 1 to 21 of 21.

Full Screen

Pupil Name	Sibling Name	Sibling School	Sibling Confirmation	Sibling Confirmation Reason	
▓▓▓▓▓	▓▓▓▓▓	Priorslee Academy (Telford & Wrekin)	Accept		✎
▓▓▓▓▓	▓▓▓▓▓	Priorslee Academy (Telford & Wrekin)	Accept		✎
▓▓▓▓▓	▓▓▓▓▓	Priorslee Academy (Telford & Wrekin)	Accept		✎
▓▓▓▓▓	▓▓▓▓▓	Priorslee Academy (Telford & Wrekin)	Accept		✎

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To edit the record, click on the grey edit button at the end of the row, as highlighted above with a red circle.

Choose to **Accept** or **Reject** the sibling confirmation from the drop down box. The sibling Confirmation Reason Box will allow you to input free text that may be relevant to the sibling connection, such as confirming the Year Group of the sibling who currently attends the school.

Please remember that a sibling is a child who lives at the same address as stated on the application and will be on roll at your school at the time that the applicant is due to start, usually the following September. Year 6 pupils at primary schools and Year 11 pupils at secondary school are not accepted siblings as they will not be on roll when the younger sibling starts the school.

Repeat the same steps for any staff claims, applying the oversubscription criteria/rule.

Now click on save

Once saved, the Admissions Database is automatically updated with the information.

This is an important process and failure to update correctly may mean the wrong criteria/rule is applied.

Selecting Criteria and Assigning Applicants (AA Schools only)

AA schools (those that are the admission authority) must rank their own applications. For those schools that administer their own appeals, you will be able to rank your applications on the SAM portal without the need for printing of lists. You will need to assign the correct criteria against each applicant. You will then have to assign these criteria in order to generate a list of applicants ready for the allocation process.

View Rankings / Applicants

To show a list of all the applicants who have applied to your school, click on the 'View Rankings' button on the Round Summary Page.
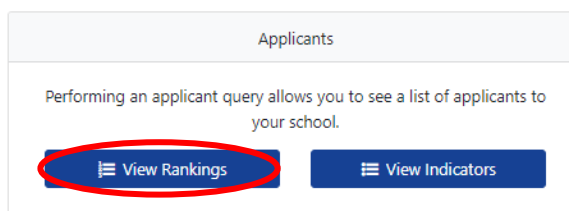
If you are a Local Authority maintained school, each applicant's criteria/rule will already have been generated by our Admissions System using the information supplied on the application. Therefore, it is important to ensure all sibling and staff claims are complete. You can filter the applicants by criteria, by using the radio buttons on the left of the screen.

For schools who are their own Admissions Authority, the highest eligible rule will also be generated, but we will ask that you confirm that you are happy with the highest eligible rule assigned and provide ranking list positions.

To do this, you will need to export a spreadsheet with all of the relevant pupil information.

Click on the 'Actions' button at the top of the screen.
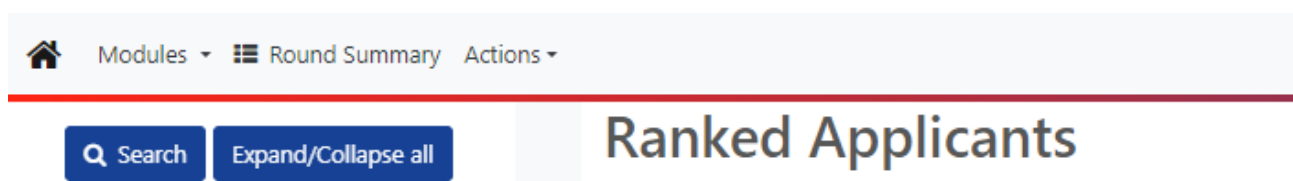
Click on the 'Export all Fields' button to pull of the information from the child's application.

Then click 'Export to Excel' to download a spreadsheet with all of the student's information.
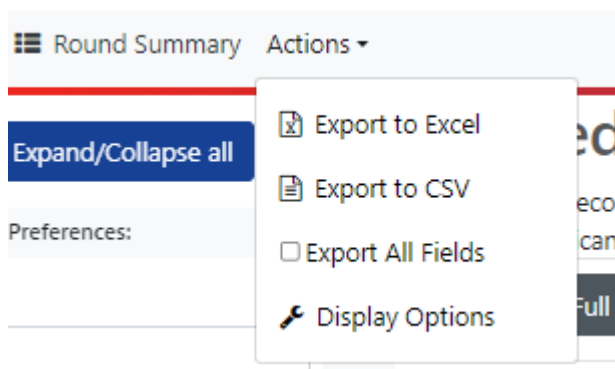
Using the information provided, please add an additional column to the spreadsheet named 'Ranking Position'. If school are happy with the highest eligible rule already provided for each

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applicant, rank accordingly in line with the schools' oversubscription criteria.

If school have additional information such as a baptism certificate or sibling connection that has not already been picked up through Admissions and would alter the eligible rule, please add an additional 'Criteria' column and provide the updated rule for the child.

Please see below example. Complete this for each child.

AppRef	Position	Criteria	Forename	Surname	Highest Eligible Ru	Distance
894-2023-09-E-(	1	LAC			L A C / P L A C	193.83
894-2023-09-E-(	2	LAC			L A C / P L A C	971.62
894-2023-09-E-(	3	LAC			L A C / P L A C	1361.88
894-2023-09-E-(	4	LAC			L A C / P L A C	4314.87
894-2023-09-E-(	5	Staff			STAFF	13352.71
894-2023-09-E-(	6	Sibling			Insib (Primary)	289.08
894-2023-09-E-(	7	Sibling			Insib (Primary)	356.46
894-2023-09-E-(	8	Sibling			Insib (Primary)	414.75
894-2023-09-E-(	9	Sibling			Insib (Primary)	433.97
894-2023-09-E-(	10	Sibling			Insib (Primary)	469.62
894-2023-09-E-(	11	Sibling			Insib (Primary)	504.12
894-2023-09-E-(	12	Sibling			Insib (Primary)	608.25
894-2023-09-E-(	13	Sibling			Insib (Primary)	970.84
894-2023-09-E-(	14	Sibling			Insib (Primary)	992.84
894-2023-09-E-(	15	Sibling			Insib (Primary)	1017.89
894-2023-09-E-(	16	Sibling			Outsib	592.89
894-2023-09-E-(	17	Sibling			Outsib	822.59
894-2023-09-E-(	18	Sibling			Outsib	1746.99
894-2023-09-E-(	19	Sibling			Outsib	2193.13

The Admissions Team will email you to prompt you when to complete this. Once complete, please return to your Admissions Case Worker.

Final Offers

All final offers will be available for schools to view on National Offer Day (NOD).

To view your final offers list, go to the round summary page for the correct transitional round and within the reports section click on 'View Final Offers'.
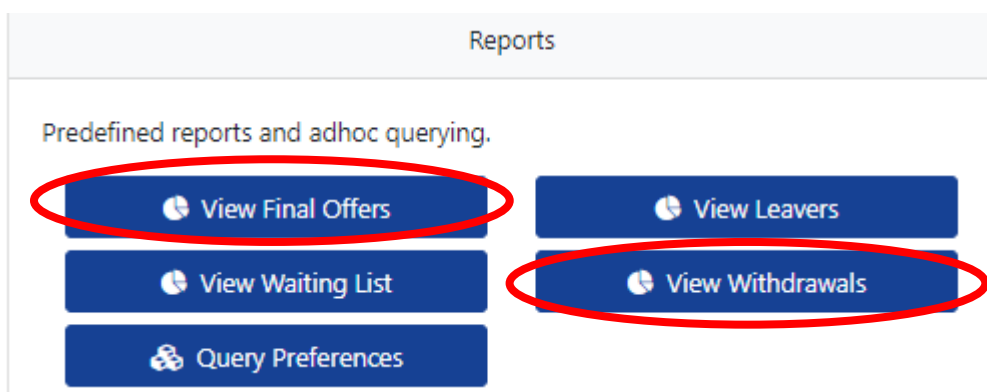
This will bring up a list of children who have been allocated your school on National Offer Day. Please be aware, that this may be subject to change within the first 3-4 weeks as the Local Authority go through an on-going review.

Changes may be due to offers being received from other Local Authorities, children no longer requiring the placement as they have moved out of area or been offered a higher preference etc.

Review Stage

The review stage will usually commences 3-4 weeks after National Offer Day. This is where parents have the opportunity to request a change of preference. Parents may request that additional preferences are added to the application or to be added to their preferred schools waiting lists.

Once the review stage has been completed, you will receive an email from the School Admissions Team who will advise you to review your final offers list to see if there have been any changes and any children have been allocated a placement at review.

Preference Status	Status Last Updated
Allocated	07/03/2023 12:30:20
Allocated	07/03/2023 12:32:20
Allocated	07/03/2023 12:30:16
Allocated	17/03/2023 12:12:32

To determine which children have been placed with you, please view the Final Offers List and look at the 'Status Last Updated' column. This will identify any children who have been allocated since NOD.

To view the children who no longer require a placement with you and may have been removed from your allocations list following review; please click on 'View Withdrawals' under the reports sections as seen above. Again, they will have an updated 'Status last updated' which will identify who has been removed from your list since NOD.

Following the review stage, if there are any additional children allocated or withdrawn from your list, you will receive an email for each child from your Admissions Case Worker.

Waiting list

To view your active waiting list, please click on 'View waiting list' under the reports section. The waiting list will show you the waiting list position of each child and what their distance is from the school.

If a place becomes available, the school Admissions Team will allocate via the waiting list and email school to inform you of the allocation so you are able to make contact with the family and admit the student to school.

Unranked Applications
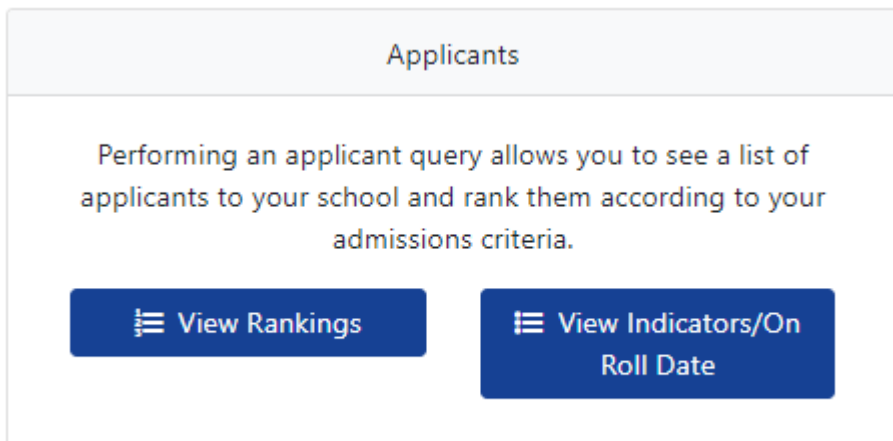
The following screen will be displayed. This will produce a list of all applicants who have submitted a preference for your school and that are unranked (Unprocessed).

There are three ways to input Criteria against an applicant in SAM.

Option 1 (Recommended if you have a small number of applicants).

- Click in the Criteria box against the child's name

- From the dropdown, choose the appropriate Criteria (Criteria 1 to Criteria 20)

- The Select box will automatically be ticked.

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- The record will turn red to indicate that it now has a criterion.

- Repeat as required.

- Click on '**Assign Selected'** which will move the applicants to the '**Ranked**' list.

Assign Selected   **Criteria dropdown box**

Unranked Radio Button

This is an extremely useful option for those schools that have to provide a list of applicants for Governor's to view and rank. Decisions can be made and the results updated in the Excel spreadsheet before importing back into SAM – this saves time as the import will automatically update all the applicants with their criteria and list position.

Please note that schools can only import a file ONCE.

For schools that use bands the import is one per band. Any further imports will overwrite the last import. If schools choose to use this option please ensure that any unranked applications still outstanding when the file is imported are ranked in SAM and new list positions generated.

Creating a List Position (AA Schools)

Moving from unranked to ranked

To assign applicants, click on the **Assign Selected** button. This will assign all those applicants that have been given a criterion and have a tick in the box in the Select column.

The applicants that have been assigned will disappear from **unranked list** and only unranked applicants remain displayed. To view the **Ranked List**, change the Radio Button from Unranked to Ranked

The following list of ranked applications will be displayed in Criteria order, followed by home to school distance.

Manual – Enter the number the child is ranked in the List Position>**Save Updated Position** (only recommended if you have a small cohort).

Automated - Generate List Position> Save Updated Positions.

Once you click in Generate List Positions, you will be presented with the following warning message in the Top of the Screen

Click - confirm to accept your positions.

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List Positions

You can make adjustments to this list by manually changing the positions in the first column and saving your list positions.

If you make manual amendments and then Click Generate List Positions again, the previous warning message will be displayed and confirming the change will result in the manual amendments being overwritten

It is possible to make amendments to the list up until the deadline date given by the School Admissions Team.

Allocations will be based on these list positions

Un-assigning criteria

If you feel that you have ranked an applicant under the wrong criteria or there is an amendment to an application resulting in a different criteria requiring assigning, you can un-assign a ranking.

Open the ranked list and select the applicant(s) and unassign using the 'Unassign Selected' button. This will put the applicant(s) back on the unranked list and you can re assign.

BEWARE – 'UNASSIGNING ALL' – WILL UNASSIGN *ALL* RANKED APPLICANTS – *ONLY* DO THIS IF YOU WISH TO RE-RANK ALL YOUR APPLICANTS.

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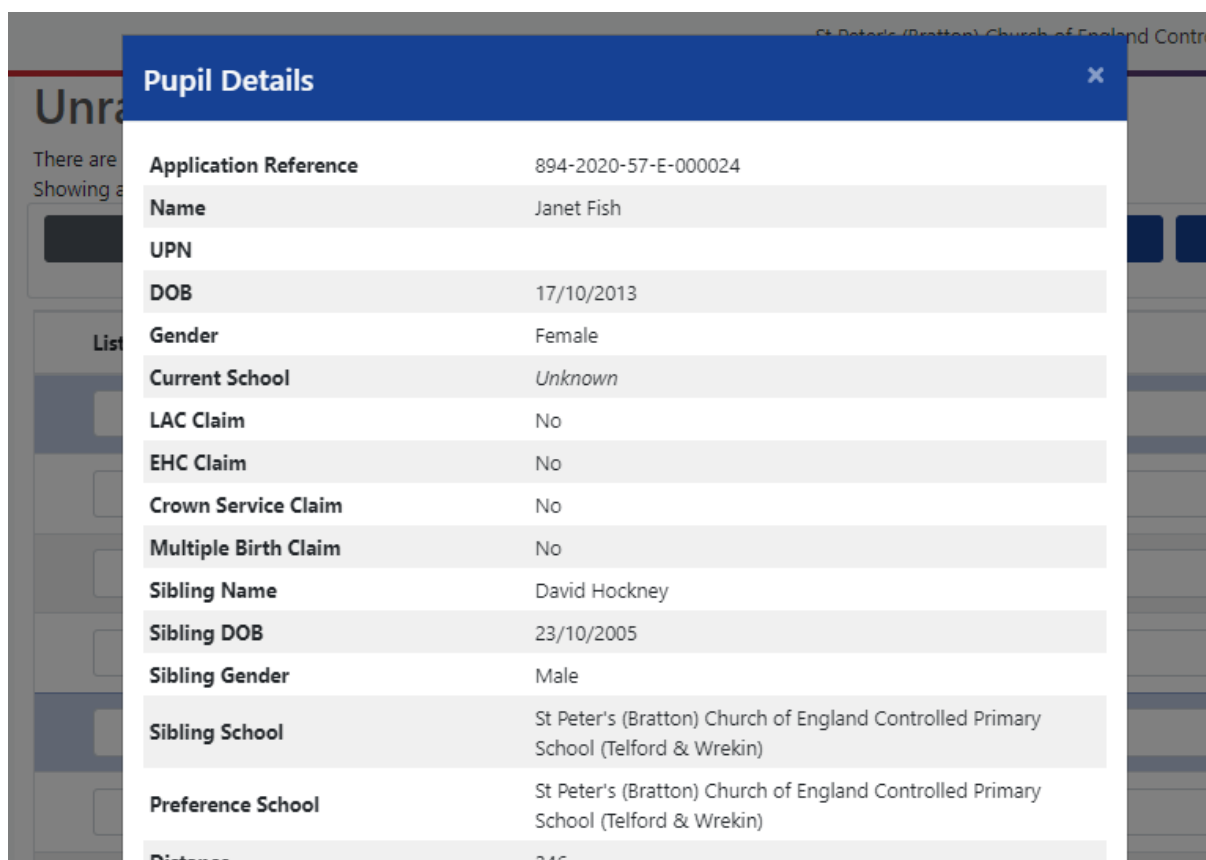
Viewing Applicant Details

Further information about individual applications can be seen in either the Ranked or Unranked Lists.

To view the full application submitted to the LA by the parent or carer click into the applicant's name it then displays details about the Applicant such as; Name, address, school, sibling and where applicable additional information to support a 'faith' application.

If there is lots of additional text, the screen may be difficult to view and it may be easier to export to excel.

The following box will then pop up:

To close the pop up screen, click on the close button in the top right hand corner.

N.B Indicators such as SEN and Looked after children need to be confirmed by the School Admissions Team

Whilst the information displayed in this box is extremely useful it is still the responsibility of the admission authority schools to confirm that the information is correct and rank accordingly.

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Reports

There are various reports that can be accessed via the Round Summary page.
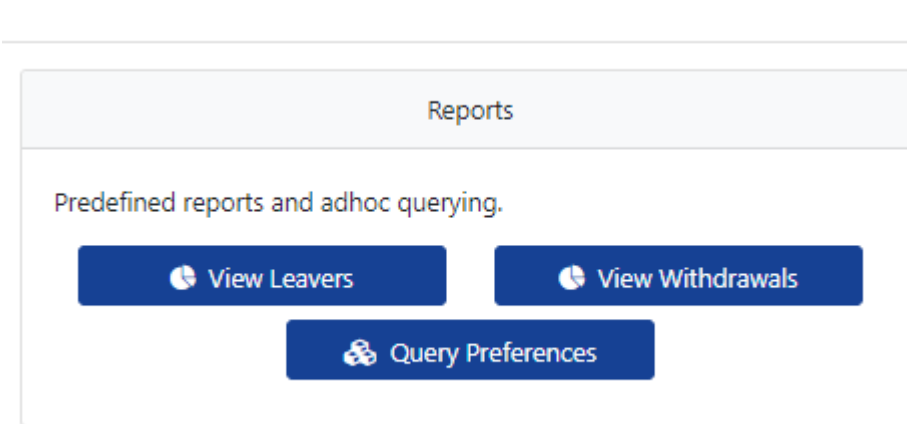
VIEW LEAVERS for Primary Schools

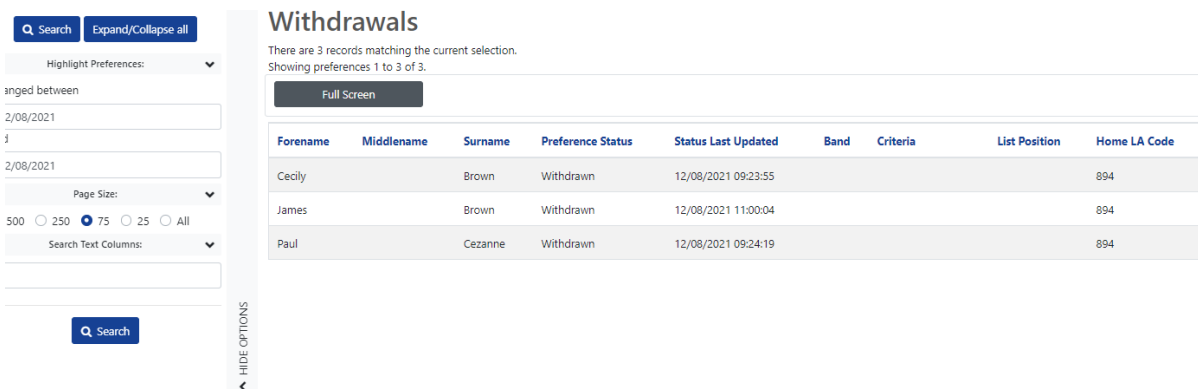Clicking on this option from the Round Summary Screen allows you to view pupils who are due to leave at the end of the current academic year (e.g. for Primary Schools this will be all the pupils in NC Year 6).

Child records with a zero figure in the No. of Preferences column have yet to apply for a Secondary School.

Primary/Junior schools wishing to view the destination schools of your Year 6 leavers they will have to change the round to the Secondary Admissions round after logging in, and click on view leavers under this round.

QUERY PREFERENCES

In a Relevant Admission Round please remember this is <u>not</u> a final offer list and is only a reflection of the ongoing process. Do not use this in relation to final offers. FOR RECEPTION INTAKE AND YEAR 7 INTAKE THE LA WILL INFORM YOU WHEN THE FINAL OFFERS ARE AVAILABE AND THE 'VIEW FINAL OFFERS' OPTION WILL BE ACTIVATED.

Clicking on this report gives you a complete overview of the allocation process that your school has undergone since the auto allocation process was run. Again, you can export this report and you can also sort on screen using the heading buttons as in previous reports.

The opening screen will display all movement regardless of status. The default display is for 75 records, however this can be expanded using the radio buttons opposite page size and clicking on 'search' to change the display.

Forename	Middlename	Surname	Preference Status	Status Last Updated	Band	Criteria	List Position	Home LA Code
Mark		Bradford	Pending	07/07/2021 16:46:39		E H C P	1	894
James		Brown	Withdrawn	12/08/2021 09:24:38				894
Cecily		Brown	Withdrawn	12/08/2021 09:23:55				894
Paul		Cezanne	Withdrawn	12/08/2021 09:24:19				894
Sal		Dali	Waiting List	12/08/2021 09:23:35		E H C P	3	894
Jim		Dine	Pending	26/07/2021 11:48:49		Sibling In	6	894
Jr	Test	Ewing	Pending	07/07/2021 17:05:23		Sibling In	4	894
Janet		Fish	Allocated	12/08/2021 10:45:57		E H C P	2	894
Keith		Haring	Pending	07/07/2021 16:46:39		Sibling In	5	894
David		Hockney	Pending	23/07/2021 12:20:14		Sibling Out	7	894
Henri		Matisse	Pending	28/06/2021 12:05:31		Catchment	10	894
Edvard		Munch	Pending	28/06/2021 12:10:21		Catchment	9	894
Pablo		Picasso	Withdrawn	12/08/2021 09:25:17				894

<u>All reports can be exported to Excel. Click on actions.</u>

This guide is an overview of the system, if you require further support with any functions of the SAM portal, please contact your caseworker who will be happy to assist.