

School Access Module – SAM

User Guide

Havering School Admissions Team

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Publication date:
September 2021

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Prelims

Disclaimer

All reasonable effort has been made to ensure this documentation is complete and accurate at the time of distribution. Information in this documentation is subject to change without notice.

Illustrations

Any Screenshots in this guide are intended as a representation of what you may see on screen. Because of the ability to customize 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.

General Information

The 'Schools Access Module' (SAM) integrates with the LA's centralised Admissions system and allows schools, amongst other things to access preference (and final destination) information relating to their school securely via the web. It also enables schools that are set within the LA's back office system as own admissions authority (AA) schools to assess and rank each application.

SAM is a live system so changes made within SAM are instantly reflected within the LA's back office system. For AA schools, once the criteria have been input, the applications are ranked and positions allocated, the information is automatically submitted back to the Local Authority (LA) for processing. This means that there is no longer a need for paper/Excel lists and numerous emails.

SAM allows schools to:

- See all applications made to their school (without the Preference rank)
- List of applicants offered a place
- Select individual pupils for more detailed information
- List of applicants whose application has been withdrawn/discarded/declined etc.
- List of applicants on waiting lists
- Year 6 leavers and their destination/offered school
- Verify certain data (eg sibling application, staff, feeder)
- Export data to Excel and manipulate
- Export lists into school's own data system using ATF Export facility

School Types

Within Synergy (the LA back office system) and the School Access Module (SAM), schools are split into two categories, AA (Admissions Authority) and Non AA schools.

Within SAM, AA Schools are required to assign an admissions criteria to each application (according to the schools published admissions criteria), rank applications and assign waiting list positions. For Non AA Schools, their applications are ranked using rules which are set up by the Local Authority in line with the determined admissions & oversubscription criteria and are applied to all applications requesting these schools before the allocation process begins.

Non AA schools are required to accept or reject claims made by parents on the application such as Sibling, Staff Child etc. It is therefore important that both AA and Non AA schools check SAM regularly, and at the very least once a week.

The AA schools in Havering are:

- Abbs Cross Academy and Arts College
- Drapers' Academy
- Drapers' Brookside Infant School
- Drapers' Brookside Junior School
- Drapers' Maylands Primary School
- Drapers' Pyrgo Priory School
- Emerson Park Academy
- La Salette Catholic Primary School
- Redden Court School
- Sacred Heart of Mary Girls' School
- St Alban's Catholic Primary School
- St Edward's Church of England Academy
- St Edward's Church of England Voluntary Aided Primary School
- St Joseph's Catholic Primary School
- St Mary's Catholic Primary School
- St Patrick's Catholic Primary School
- St Peter's Catholic Primary School
- St Ursula's Catholic Infant School
- St Ursula's Catholic Junior School
- The Champion School
- The Coopers' Company and Coborn School
- The Frances Bardsley Academy for Girls

Logging In

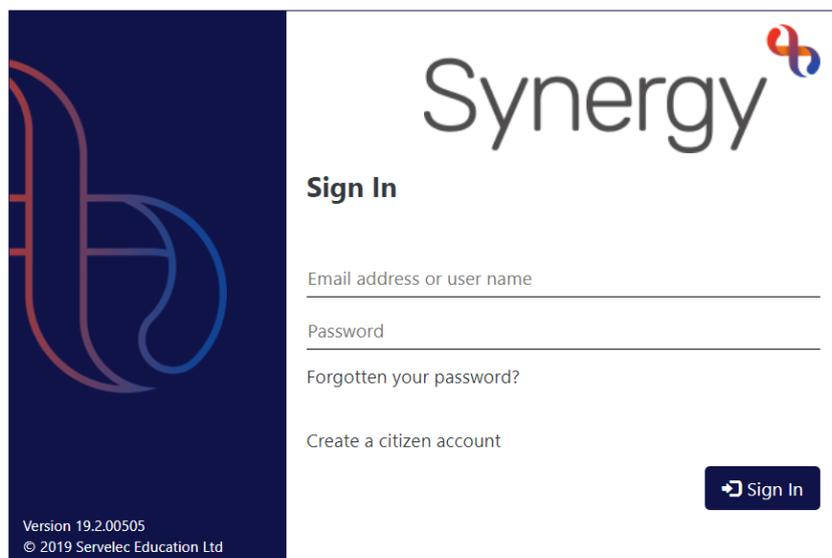
Open Internet Explorer and enter the following link:

www.havering.gov.uk/admissions/SAM

You may wish to save the link in your favourites or create a shortcut to it from your desktop.

This home page will be used by the LA to provide user guide videos and updated training material.

To access the login screen for SAM, click on the 'Access SAM here' link.



Enter your Username and Password. Your account has been set up by the School Admissions Team. If you require a reminder of your username please contact the School Admissions Team. .

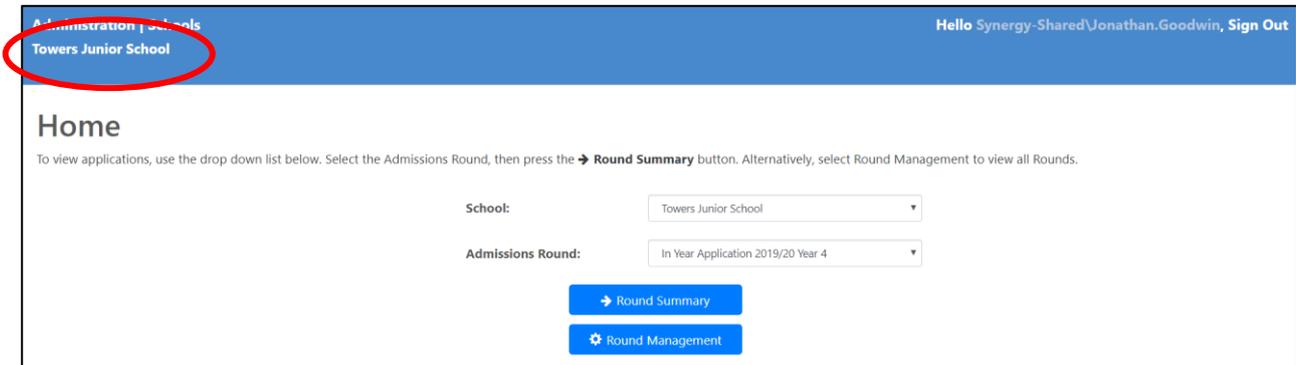
NB. Username and Password are case sensitive

If you enter an incorrect username and/or password you will get the following message. If you forget your password, you can reset this via the 'forgotten your password' link



Once logged in you will be taken to the 'Home' page.

Please ensure that the school name at the top left corner of the screen relates to your school if it does not please close the application and inform the School Admissions Team immediately

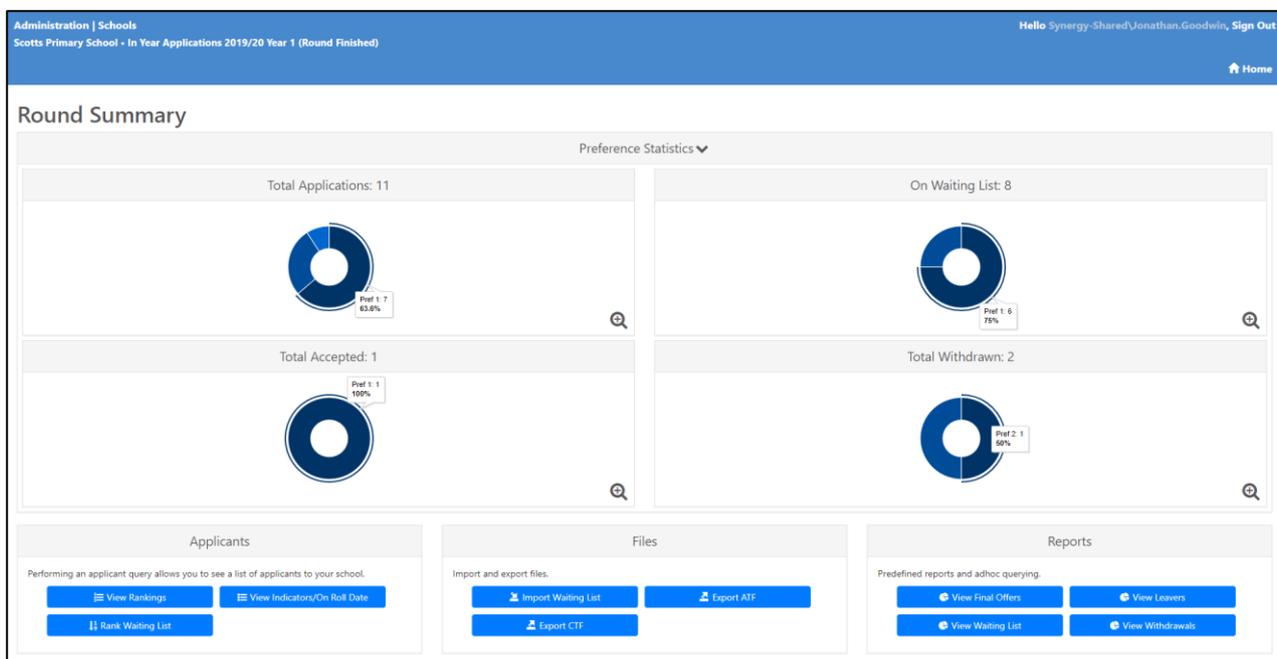


From the home page you can do two things, view a Round Summary, or enter the Round Management screen.

SAM works on Rounds which are setup by the LA, there is a round for each year group.

[The Round Summary Page](#)

From the 'Round Summary' page you are able to access your schools preference statistics, which are displayed as doughnut charts and access the areas required to accept or decline claims (such as sibling), apply admissions criteria and rank applications.



Preference Statistics is for statistical information regarding applications made to your school, for the round selected. This can be useful for a school who wish to gauge the interest in their school and for possible financial planning and is displayed as a nice interactive doughnut graph for a clearer understanding of the breakdown.

Applicants: This is the main section used and is where schools can view the applications in detail for the selected round (year group). It is also where AA schools apply criteria and rank

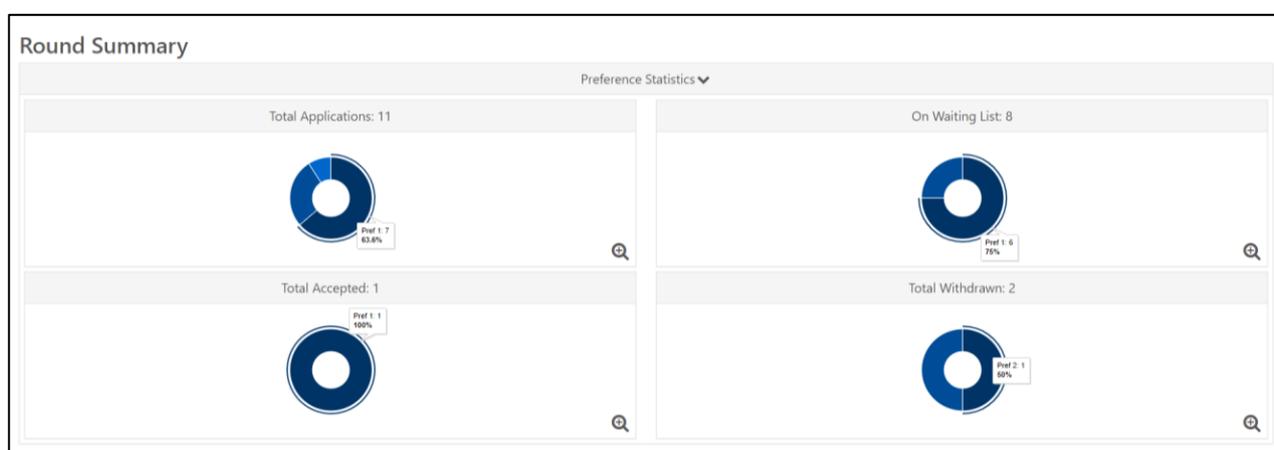
applications using their own admissions criteria and where Non AA schools accept / reject claims made by the parent on their application. It is also where both AA and Non AA schools visit to advise the system that a pupil has been placed on roll.

Files: This section is for more useful for the Cohort rounds where schools can export an ATF of final offers, which in turn can be imported into the schools own database.

Reports: This section is used to produce various reports all of which can be exported (via the Actions section) to Excel should you wish to manipulate data or produce mailing lists.

Preference Statistics

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



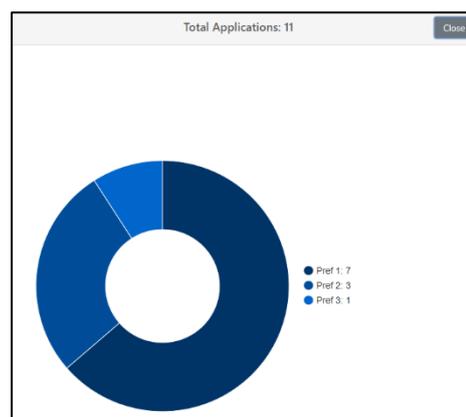
Clicking on the magnifying class of your chosen option will expand the statistics.

Total Applications

Expanding the 'Total Applications' chart will provide statistical information about the total number of applications received for that round (year group).

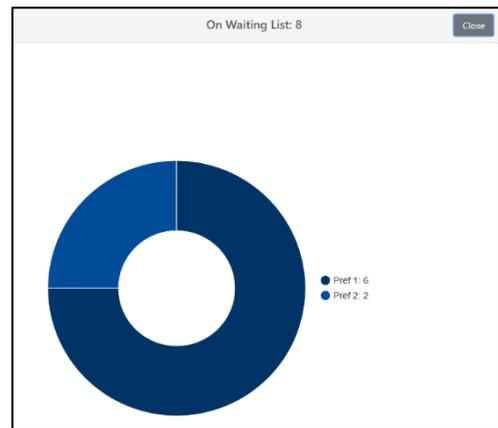
As an example, the screen here shows how many applications have been received for this school.

Of the 11 applications received, 7 expressed it as a first preference, 3 as a second and 1 as a fourth etc.



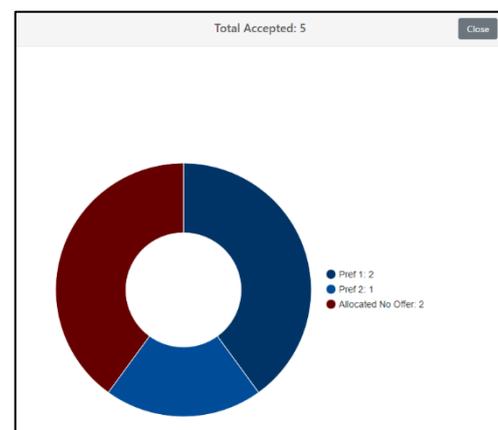
Waiting List.

Expanding the Waiting List chart will provide statistical information about the applicants on the waiting list.



Total Accepted

Expanding the Total Accepted chart provides statistical information about how offers were made. For example in this screen, of the 5 places offered, 2 expressed it as a first preference and 1 expressed it as a second preference and 2 were allocated a place at the school (NSV). A NSV is where the pupil does not have a school in Havering and the LA offer the Nearest School with a Vacancy (after all preference offers are made).

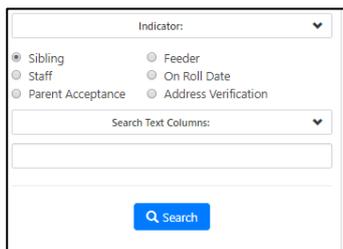
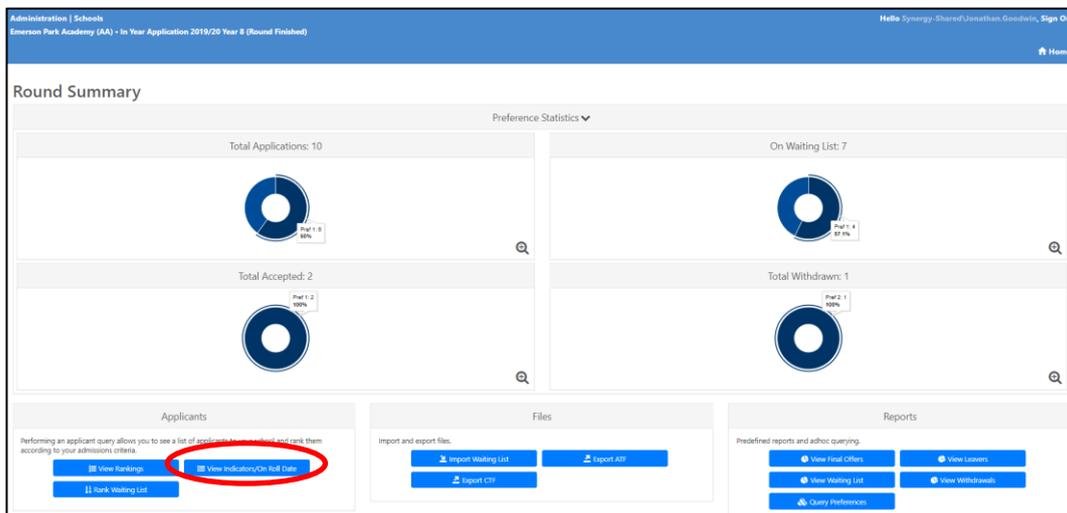


Non AA Schools - How to accept or reject a claim

All Non AA schools you must accept or reject claims made by the parent on the pupil's application (such as sibling etc...).

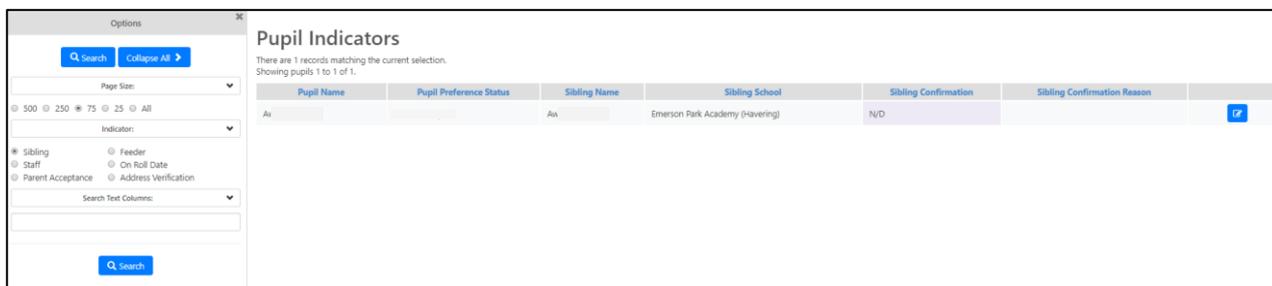
From the Home screen choose the round (year group) you wish to work on and click round summary.

Select the 'View Indicators / On Roll Date' option from the Applicants Section.



From the left hand side options pane, click the claim you wish to verify e.g. if you wish to verify sibling claims click to the sibling radio button and click search.

You will be shown a list of all the pupils for that round who have applied for the school under the sibling criteria.



Pupil Name	Pupil Preference Status	Sibling Name	Sibling School	Sibling Confirmation	Sibling Confirmation Reason	
As		As	Emerson Park Academy (Havering)	N/D		

For each claim, the school must either accept or reject the claim, to do this click on the blue pen icon  to the right of the pupil's record, the option to then accept or reject the claim is shown. There is also the option to add reasons if required ie. Sibling no longer attends our school.

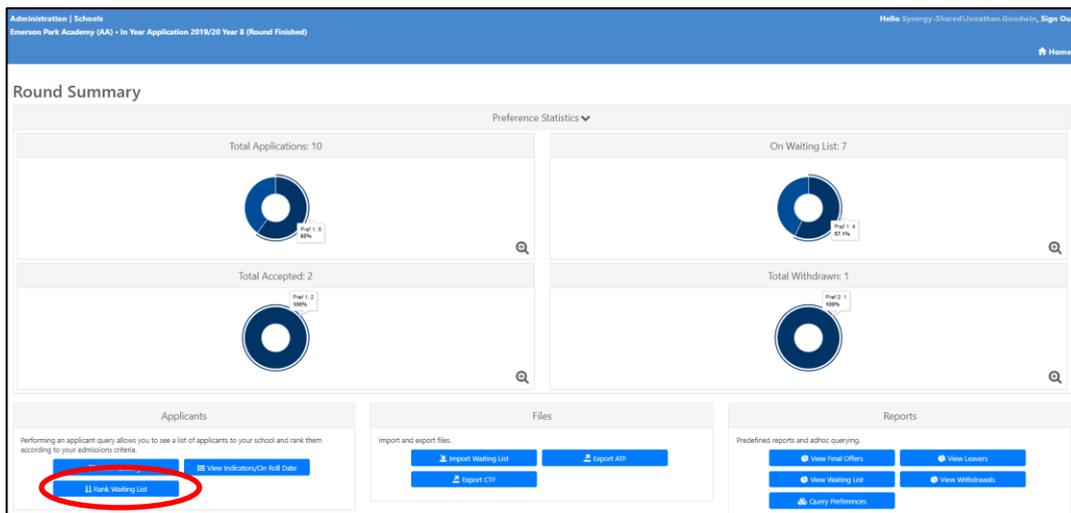
After accepting or rejecting the claim you must save the record using the save icon. 

Once saved this information is instantly updated within the LA's back office system.

AA Schools - Applying a criteria to pupil's application

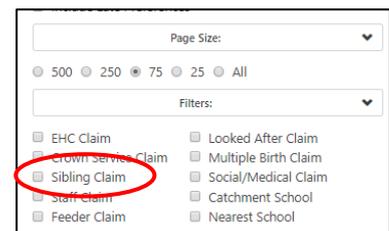
From the Home screen choose the round (year group) you wish to work on and click round summary.

Select the 'Rank Waiting List' option from the Applicants Section.



You will automatically be taken to the 'Unranked Applicants (Waiting List)' screen.

From this screen it is recommended that you filter the applications by 'claims' to make it easier to apply the correct criteria. E.g. from the left hand options pane, under the filters option, click on 'Sibling Claim' and then search. If there are any applications under the sibling criteria they will be displayed, the school can then apply the appropriate criteria to the pupil by clicking into the criteria box and selecting from the dropdown the appropriate criteria.



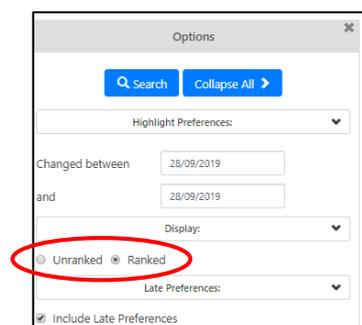
To view the sibling information, click on the pupil name and the pupil's details will be displayed.

If you wish to apply the same criteria to all pupils currently displayed, you can do this in bulk by changing the 'Default criteria' to the appropriate criteria and then selecting 'Assign All' from the top menu.



Once all 'claim' applicants have been given a criteria, the remaining pupils can be given criteria, this can either be done individually or as above in bulk.

Once applicants have been given a criteria, they will be moved into the Ranked Applicants sections you can toggle between the Ranked and Unranked sections by clicking on the appropriate radio buttons in the options pane.



AA Schools - Applying a list position to pupils

Before any offers can be made, you must apply a list position to each pupil, this will determine the position on the waiting list the pupil will sit.

From the Home screen choose the round (year group) you wish to work on and click round summary.

Select the 'Rank Waiting List' option from the Applicants Section.

The screenshot shows a dashboard for 'Emerson Park Academy (AA) - In Year Application 2019/20 Year 8 (Round Finished)'. It features four donut charts: 'Total Applications: 10' (100%), 'On Waiting List: 7' (70%), 'Total Accepted: 2' (20%), and 'Total Withdrawn: 1' (10%). Below these are three sections: 'Applicants' with a 'Rank Waiting List' button circled in red, 'Files' with 'Import Waiting List' and 'Export All' buttons, and 'Reports' with 'View Final Offers', 'View Leavers', 'View Waiting List', 'View Withdrawals', and 'Query Preferences' buttons.

You will automatically be taken to the 'Unranked Applicants (Waiting List)' screen.

The 'Options' panel includes search and collapse controls, 'Highlight Preferences', date filters, 'Display' options, radio buttons for 'Unranked' and 'Ranked' (with 'Ranked' selected), 'Late Preferences', 'Page Size', radio buttons for '500', '250', '75', '25', and 'All', and a 'Filters' section with checkboxes for 'EHC Claim', 'Crown Service Claim', 'Sibling Claim', 'Staff Claim', 'Feeder Claim', 'Looked After Claim', 'Multiple Birth Claim', 'Social/Medical Claim', 'Catchment School', and 'Nearest School'. The 'Order By:' dropdown is set to 'Criteria' and is circled in red.

Click on the 'Ranked' option from the options panel.

You will be presented with a list of pupils that have been given a criteria but have not been given a list position.

To assign list positions, firstly select to order the list by criteria from the options pane, this will ensure the list is then in the correct criteria priority order.

In the example below, Bethany is at the top of the list because she has a sibling at the school (and therefore is criteria 2), the rest are ordered by distance.

Ranked Applicants (Waiting List)
There are 7 records matching the current selection and 210 Places available.
Showing applicants 1 to 7 of 7.

List Position	Select	Name	Criteria	Distance
*	<input type="checkbox"/>	Bethany	Criteria 2	3086.26
	<input type="checkbox"/>	Ny	Criteria 5	3921.56
	<input type="checkbox"/>	ver	Criteria 5	4512.05
	<input type="checkbox"/>	TRC	Criteria 5	5139.2
	<input type="checkbox"/>	Re	Criteria 5	5170.07
	<input type="checkbox"/>	lc	Criteria 5	5872.88
	<input type="checkbox"/>	A	Criteria 5	9688.33

To assign waiting list positions to the pupils, click 'Generate List Positions' from the top menu.

The navigation bar includes buttons for 'Generate List Positions' (circled in red), 'Save Changes', 'Actions', 'Hide Options', 'Collapse Header', and 'Round Summary'.

This will assign a number next to each pupil and you can then save the changes from the top menu.



Ranked Applicants (Waiting List)

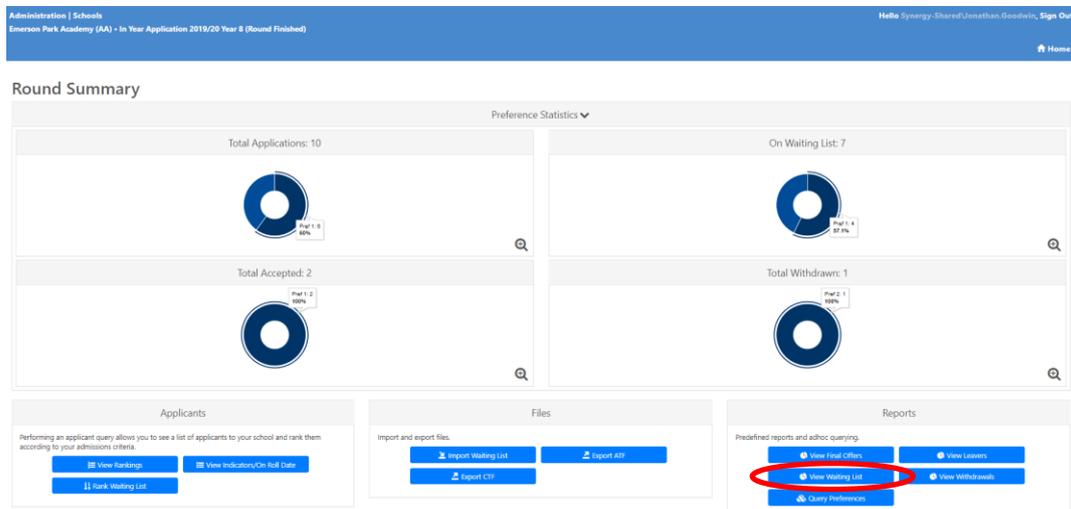
There are 7 records matching the current selection and 210 Places available.
Showing applicants 1 to 7 of 7.

List Position	Select	Name	Criteria	Distance
1	<input type="checkbox"/>	Bethany	Criteria 2	3086.26
2	<input type="checkbox"/>	Nya	Criteria 5	3921.56
3	<input type="checkbox"/>	vern	Criteria 5	4512.05
4	<input type="checkbox"/>	TRST	Criteria 5	5139.2
5	<input type="checkbox"/>	Reyr	Criteria 5	5170.07
6	<input type="checkbox"/>	Idre	Criteria 5	5872.88
7	<input type="checkbox"/>	Ale	Criteria 5	9838.33

All Schools - Viewing Waiting Lists

From the Home screen choose the round (year group) you wish to work on and click round summary.

Select the 'View Waiting List' option from the Reports Section.



The default setting is to order the list in alphabetical order by surname, you can change this by clicking on the headings e.g. If you want the list in position order, click on the heading 'Waiting List Position'.

Waiting List						
There are 7 records matching the current selection. Showing preferences 1 to 7 of 7.						
Waiting List Position	Application Reference Number	Forename	Surname	DOB	Gender	

All Schools - Viewing Offers

From the Home screen choose the round (year group) you wish to work on and click round summary.

Select the 'View Final Offers' option from the Reports Section.

The screenshot shows the 'Round Summary' page for Emerson Park Academy (AA) - In Year Application 2019/20 Year 8 (Round Finished). The page is divided into several sections:

- Preference Statistics:** A dropdown menu.
- Total Applications: 10:** A donut chart showing 60% (Part 1) and 40% (Part 2).
- On Waiting List: 7:** A donut chart showing 29% (Part 1) and 71% (Part 2).
- Total Accepted: 2:** A donut chart showing 100% (Part 1).
- Total Withdrawn: 1:** A donut chart showing 100% (Part 1).
- Applicants:** Buttons for 'View Rankings', 'View Indicators/On Roll Data', and 'Rank Waiting List'.
- Files:** Buttons for 'Import Waiting List', 'Export AEP', and 'Export CSV'.
- Reports:** Buttons for 'View Final Offers' (highlighted with a red circle), 'View Issues', 'View Waiting List', 'View Withdrawals', and 'Query Preferences'.

You will be presented with a list of all the pupils that have been offered places throughout the year. To view details of these pupils you can click on then pupil name and this will open up all the details provided by the parent on the application form.

The default vie is alphabetical by surname and by may find it useful to sort the list by Status Last Updated as this will reorder the list is date order.

The screenshot shows the 'Final Offers' table with the following data:

Forename	Middlename	Surname	Preference Status	Status Last Updated	Band	Criteria	List Position	Home LA Code
Mar		Aw	Parent Accepted	12/09/2019 08:24:46		Criteria 5		311
Jai		Bin	Parent Accepted	13/09/2019 12:45:19		Criteria 5		311

All Schools - Indicating a Pupil is On Roll

As soon as a pupil is admitted to the school, schools must update SAM with this information.

This involves schools completing 3 Steps

1. Putting an on roll date in SAM for the pupil
2. Changing the status from offered to parent accepted
3. Updating the schools attendance count (covered in next section)

Please ensure that you follow the steps in the correct order. Changing the status to 'parent accepted' will remove the pupil from the current offer list and place them into the withdrawals list. And therefore in the offer list you will now only see pupils that have had a new offer (or have not yet been placed on roll) and need action.

Putting an on roll date in SAM for the pupil

From the Home screen choose the round (year group) you wish to work on and click round summary.

Select the 'View Indicators/On Roll Date' option from the Applicants Section.

Administration | Schools
Emerson Park Academy (AA) - In Year Application 2019/20 Year 8 (Round Finished)

Hello Synergy-Shared/Leonathan.Goodwin, Sign Out

Round Summary

Preference Statistics

Total Applications: 10
On Waiting List: 7
Total Accepted: 2
Total Withdrawn: 1

Applicants
Performing an applicant query allows you to see a list of applicants to your school and rank them according to your admissions criteria.

View Rankings | **View Indicators/On Roll Date** | Rank Waiting List

Files
Import and export files.
Import Waiting List | Report ATR | Report CTR

Reports
Predefined reports and adhoc querying.
View Final Offers | View Lowest | View Waiting List | View Withdrawals | Query Preferences

Search | Expand/Collapse all

Page Size: 500 | 250 | **75** | 25 | All

Indicator: Sibling | Feeder | Staff | **On Roll Date** | Parent Acceptance | Address Verification

From the left hand side options pane, click the On Roll Date option and then Search. This will show you all the pupil's offered places that have not yet been given an on roll date

To add the on roll date to the pupil click on the blue pen icon

Pupil Indicators

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

Full Screen

Pupil Name	Pupil Preference Status	On Roll Date
Test, Jon	Offered	

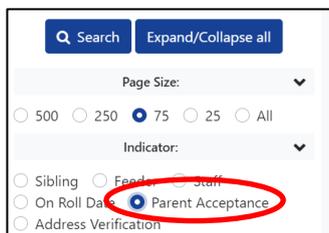
Here you can enter the pupils on roll date, this can either be entered by typing the date in dd/mm/yyyy format or by using the inbuilt calendar function.

Once the date has been entered click the save icon 

Changing the status from offered to parent accepted

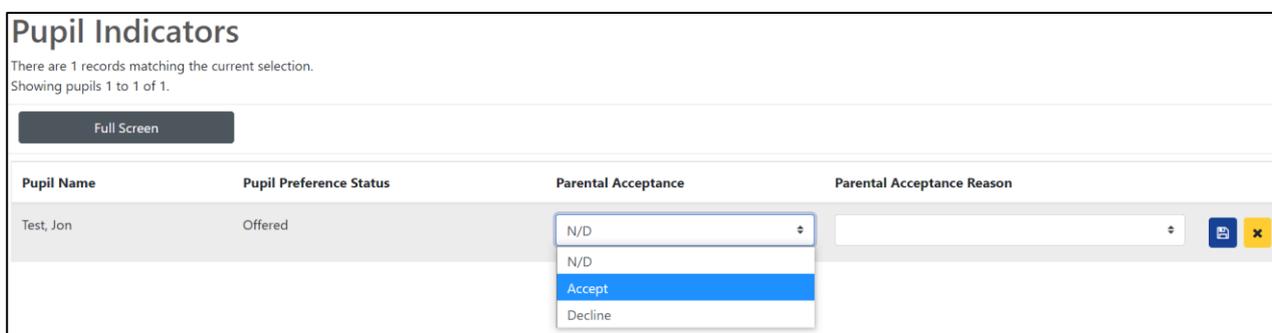
This must only be done after you have given the pupil an on roll date

After you have added an on roll date you will be taken back to the previous page, where you will now see an on roll date next to the pupil.



From the left hand side options pane, click the Parent Acceptance option and then Search.

Click on the blue pen icon to the right of the screen next to the pupil you have just given an on roll date to



Change the Parental Acceptance status from N/D to Accept and click save. **PLEASE DO NOT SELECT DECLINE – SEE BELOW FOR EXPLANATION**

Please note: Changing the status to 'parent accepted' will remove the pupil from the current offer list and place them into the withdrawals list. Therefore in the offer list you will now only see pupils that have had a new offer (or have not yet been placed on roll) and need action.

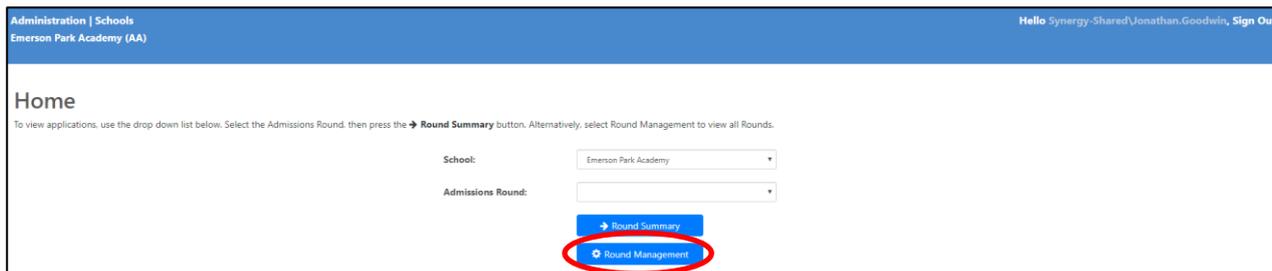
PARENT STATUS 'DECLINE'

The 'Decline' option should NEVER be used for In Year applications, the option does not release a vacancy and therefore will make your figures inaccurate. If a parent informs you that they are refusing the offer, please email the School Admissions Team with the details and we will ensure that the child is still accessing education elsewhere and then withdraw the offer which will release the vacancy.

As soon as you place a child on roll, you must update your attendance count to reflect the admission via the Round Management screen

All Schools - Numbers on Roll / Round Management

From the home screen select Round Management. You do not need to select an admissions round.



You will be presented with the Round Management screen that enables you to update your schools attendance counts.

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	No. of Appeals	In Year	Attendance Count Modified Date/Time	Attendance Count Modifier
	In Year Application 2019/20 Year 7			No	210	208	210	73	0	0	1	2	73	0	Yes	27/09/2019 11:29:32	Synergy-Shared\Jonathan.Goodwin
	In Year Application 2019/20 Year 8			No	210	208	210	7	2	2	1	0	7	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall
	In Year Application 2019/20 Year 9			No	210	208	210	4	2	2	1	0	4	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall
	In Year Application 2019/20 Year 10			No	210	206	210	1	4	4	2	0	1	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall
	In Year Application 2019/20 Year 11			No	192	190	192	2	0	0	1	2	2	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall

Editable fields are displayed in yellow.

The attendance count displays the total number of pupils attending the school and currently on roll. **This number must be updated when new pupils are placed on roll following an offer from the School Admissions Team. You will also need to update the attendance count field when somebody leaves.**

The 'No. of places available' displays the number of places that the school has for each year group. This is usually the same as your PAN. It is not your vacancy numbers.

To edit the attendance count number, click on the blue pen icon to the left of the round (year group) you wish to update.

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	No. of Appeals	In Year	Attendance Count Modified Date/Time	Attendance Count Modifier
	In Year Application 2019/20 Year 7			No	210	208	210	73	0	0	1	2	73	0	1	27/09/2019 11:29:32	Synergy-Shared\Jonathan.Goodwin
	In Year Application 2019/20 Year 8			No	210	208	210	7	2	2	1	0	7	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall
	In Year Application 2019/20 Year 9			No	210	208	210	4	2	2	1	0	4	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall
	In Year Application 2019/20 Year 10			No	210	206	210	1	4	4	2	0	1	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall
	In Year Application 2019/20 Year 11			No	192	190	192	2	0	0	1	2	2	0	Yes	06/09/2019 10:47:40	Lorraine Heptinstall

Make your changes as required and click icon  to update the admissions database or click the cross icon to cancel your changes.

The School Admissions Team will offer places based on the number in the vacancy column. It is imperative that your attendance count numbers are correct.

The School Admissions Team **will not** take responsibility for this information being inputted incorrectly. If the number is inputted incorrectly and the School Admissions Team make an offer which results in the school being placed over the admissions number, the school will be expected to admit this pupil with immediate effect.

The system takes a snap shot of the vacancies screen every morning, should an offer me made and the school dispute that their figures were incorrect (and as a result the school is now over PAN), the LA will refer to the daily snapshot to see if a vacancy was showing before the offer was made.

The system works out your vacancy figure using the following calculation.

No. of Places Available **minus** Attendance Count **minus** No. of Places Offered / Accepted but not yet on roll

Example:

	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
	In Year Application 2019/20 Year 8			No	210	208	210	7	2	2	1	0	7

210 (No. of Places Available) **minus** 208 (Attendance count) = 2, **minus** 2 (No. of Places offered / Accepted but not yet on roll) = 0 Vacancies