

Plan-it pre-16 Year End Process

Who is this document for?

This document is for co-ordinators at schools that had learners in the Plan-it system in a previous academic year.

Year end tasks can only be performed by supervisors who have Administrator access within Plan-it.

What is the year end process and why is it needed?

At the end of an academic year, Plan-it data is updated to reflect learner's progression from one year to the next. This process is completed automatically, as Plan-it makes assumptions about learner progression. **However, it is vital that coordinators check that the assumptions made by the system are correct.**

This document explains what happens, and identifies actions that a Plan-it Administrator needs to take.

The areas of the system affected by the change of year are:

- The learner's year group
- The learner's tutor (or Plan-it) group
- The allocation of staff access to learner information

In addition, you will need to check the following:

- Do you have new learners or staff in the school for the new academic year?
- Have any learners or staff left the school over the summer?
- Have your subject offers changed since last academic year?

The 'Handbook' referred to in this document is found at www.s-cool.co.uk/planithandbook. If you are not sure about what you should do, please contact your School Support Team for help.

Movement of learners from one year group to the next

Plan-it assumes that all learners will move up one year group over the summer. When learners use Plan-it in the new academic year, they will be automatically presented with the activities for their new year group.

YOU NEED TO:

- Confirm that no learners have been kept back a year. If you find that a learner is in the wrong year group, please forward their first name, surname, date of birth and the CORRECT information relating to year group to your School Support Team. They will communicate with S-cool to correct any errors and will confirm with you once changes have been made.

What happens to the groups that the learners are in?

If your learners were set up in groups, they will remain in the same groups for the new academic year.

YOU NEED TO:

- Confirm that learners are still in the correct groups for the new year. If they are not, select the 'Change Learner's Groups' function in the administration area. Please refer to the 'Getting started: key admin tasks' document on the Handbook for details.

- Confirm that group names are still correct in the new year. To edit group names, select the 'Change Learner's Groups' function in the administration area. Please refer to the Handbook for details.

Please note: Group names are unchanged during the year end process. If you have included the year group as part of the name, they will need to be updated by an Administrator.

What happens with staff access to learners' data?

Staff with high level (Administrator) access will still be able to see all learners' work and perform administration functions.

Staff who had 'supervisor' status in a previous year and were assigned access to specific groups will NOT be assigned to any groups at the start of a new year.

YOU NEED TO:

- Reassign access before staff can view learner data. For more detail on how to do this, please refer to the Handbook.

Please note: this will not prevent staff from successfully using the 'Forgotten Password' or 'Create New User' function in the learner site, using their password

What do I do if information about a learner is incorrect?

If any of the following information about a learner is incorrect:

- First name
- Surname
- Date of Birth
- Year Group
- UPN
- SIMS no (or equivalent)

YOU NEED TO:

- Send all details about the learner, including the required changes, to your School Support Team. They will communicate with S-cool and take the necessary steps.

What do I do if a learner has left the school / provider?

If a learner has left the school / provider please do one of the following:

YOU NEED TO EITHER:

- a) Use the 'Not at my provider' function in the administration area (see Handbook for details).
- b) OR Send the first name, surname, date of birth and UPN to your School Support Team. They will communicate with S-cool and take the necessary steps.

What do I do if new learners have joined the school?

New learners need to be imported into the system. This requires coordinators in schools / providers to submit the following details for each learner:

- First Names,
- Surnames,
- Dates of Birth,
- Year Group,
- Tutor Group,



- Gender,
- Ethnicity
- UPN
- SIMS number

This information should be submitted to the School Support Team. A template spreadsheet for this can be found on the Handbook – ‘Getting passwords for learners’.

Following import, the school will be issued with a list of temporary passwords for their new learners. On first login, learners are required to change this password. We recommend that they use their network password.

Please note: the ‘Create New User’ function continues to give staff the ability to create new learners in a classroom situation, through the learner site. As this function does not incorporate the same rigorous checking for duplicate learners in the system, we would ask you to only use this option for new learners if there is not enough time to send the import spreadsheet to your School Support Team.

What do I do if information about a supervisor is incorrect, or if they have left the school / provider?

Any changes to supervisor information can only be done by S-cool.

If you require changes, please email all the relevant details to your School Support Team, who will work with S-cool to update the data.

What about subject information?

Plan-it will keep any existing subject lists with the year groups they were entered against. E.g. If English KS3 was assigned to Y9 last year then it will be assigned to Y9 this year.

YOU NEED TO:

- Confirm that the subjects offered to years 9-11 are correct for your school. If they need to be changed, use the ‘Subject Management’ function in the Administrator area. Please refer to the Handbook for details.

What if my learners forget their passwords over the summer?

If any learner has forgotten their password, a temporary, secondary password can be generated by your School Support Team. Please forward the first name, surname, date of birth and year group of learners to your SST and they will provide you with secondary passwords.

Secondary passwords are unique to each learner, to ensure data is protected and they are given in addition to the existing password.

At the start of the new academic year learners are able to access Plan-it using either their existing password or a secondary password, if one has been supplied.

- If learners use their existing Plan-it password, the secondary one will no longer work. All future access will be using this password.
- If learners use the secondary password, the system requires them to change the existing password for all future use. The secondary password will then no longer work.



When does the year end process take place?

The year end process takes place each year, during August, so that your school data is correct both at the end of the current year and at the start of the new academic year.