

1. Who is this document for?

This document is for coordinators at schools/providers 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.

2. 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 a learner's progression from one year to the next. This process is completed automatically, as Plan-it makes assumptions about learner progression.

Please note: 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

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 any learners or staff changed (tutor) group?
- 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.

3. 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.

4. 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 learners' groups' function in the administration area. Please refer to the 'Key administration 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 learners' 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.

5. 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.

Please note: Staff who were assigned access to specific groups in a previous year will remain assigned to the same groups for the new academic year.

YOU NEED TO:

- Confirm that staff are still assigned to the correct groups at the start of the new year. If they are not, select the 'Assign supervisors to groups' function in the administration area. Please refer to the 'Key administration tasks' document in the Handbook for details.

6. 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
- UPIN (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.

7. 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:

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

8. What do I do if new learners have joined the school/provider?

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

- First Name
- Surname
- Date of Birth
- Year Group
- Tutor Group
- Gender
- Ethnicity
- UPIN (SIMS no. or equivalent)

This information should be submitted to the School Support Team. A template spreadsheet for this can be found in the Handbook.

Following import, learners will be able to access Plan-it using the temporary passwords set by the school/provider. On first login, learners are required to create a unique username and change this password. We recommend that they use their network password.

9. What do I do if information about a member of staff is incorrect, or if they have left the school/provider?

Any changes to staff 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.

10. 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 administration area. Please refer to the Handbook for details.

11. What if my learners forget their passwords over the summer?

If a learner has forgotten their password, either administrators or supervisors are able to help reset the learner's password.

An administrator can reset a learner's password at any time using the 'Edit learner details' function in the administration area. Please refer to the 'Key administration tasks' document in the Handbook for further details.

If a learner has forgotten their password when trying to login, a supervisor can help them to reset their own password using the 'Forgot password?' function on the learner login page. Please refer to the 'Forgotten Password Function' document in the Handbook for further details.

12. What if learners forget their username over the summer?

If a learner has forgotten their username, either Administrators or Supervisors are able to remind the learner of their details.

Administrators can pull up lists of all learner's usernames through the 'Plan-it Learner Usernames Report' function, in the reporting area of the supervisor site.

Supervisors can also pull up a list of learners' usernames through the 'Plan-it Learner Usernames Report' function, in the reporting area of the supervisor site.

The username data generated through the reports can be exported from Plan-it into Excel or PDF so that, when required, it can be printed out prior to lessons.

13. When does the year end process take place?

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