SAM

School Access Module

A user guide for voluntary aided, foundation and academy schools

Version 4.1 – March 2023

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1. Introduction

The Schools Access Module (SAM) has been developed by our admissions software provider, Access Group-Synergy, as a web based system to allow you to view your total preference numbers, assess and rank preferences for your school, and when available, view and download final allocations and order waiting lists.

Schools with pupils transferring will be able to see if their pupils have submitted any applications and at the end of the allocation process where pupils have been allocated a place.

2. Contacts and Support

If you forget your school's username and/or password please see the Derbyshire SchoolsNet (use the Search facility and input "SAM". Alternatively you can contact the Children's Services Information Team by emailing CS.Informationenquiries@derbyshire.gov.uk

If you have any queries about individual pupil preferences or the co-ordination process and timescales, please contact the Admissions and Transport Team on 01629 537479 or email admissions.transport@derbyshire.gov.uk.

Schools may find the admissions timescales useful when assisting with the allocations process. These are published on SchoolsNet in the School Admissions Section.

Please remember that timescales are published as a guideline and may be subject to change.

3. Confidentiality and Security

The system is hosted on the Derbyshire SchoolsNet and therefore can only be accessed by Derbyshire schools with a valid username and password. You have been issued with a further username and password to access SAM which should only be disclosed to those directly involved in the admissions process.

All information available through SAM is strictly confidential between schools and the Admissions and Transport Team. All decisions must only be conveyed to parents by the Admissions and Transport Team and must not be disclosed by schools. If parents contact you for confirmation of decisions, be it an offer or refusal, please refer them to the Admissions and Transport Team.

4. Getting Started

Log on to the Derbyshire SchoolsNet and go to the SAM link. Enter your schools username and password (provided previously by Extranet mailing) on the log on screen shown below (please use uppercase):

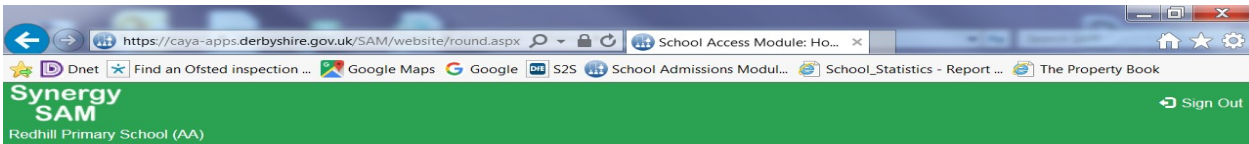## 5. Selecting an Admissions Round

Your school name should be visible at the top of the screen once you have successfully logged on.

Select the appropriate round for your school from the drop-down box. SAM has been upgraded to allow use across a wider range of devices, covering laptops, desktops and tablets. Admission rounds for 2023 entry are listed below:

Applications for Reception intake   -   2023-24 Reception Intake
Applications for Y3 intake   -   2023-24 Junior Intake
Applications for Y7 intake   -   2023-24 Secondary Intake

At any time should you wish to log out, change round or return to main school screen (home) you can click on the shortcut buttons at the top of the screen.

6. Viewing the Number of Preferences for Your School

Your schools "Home" page should have now appeared.

You will be able to view the number of preferences received to date for your school as soon as applications are entered onto the Admissions and Transfers System by the Admissions and Transport Team (from mid September for secondary and from mid November for primary).

To assist you the vital statistics have been updated to be visual, with each of the sections shown in graphical form, providing quicker visibility of each count.
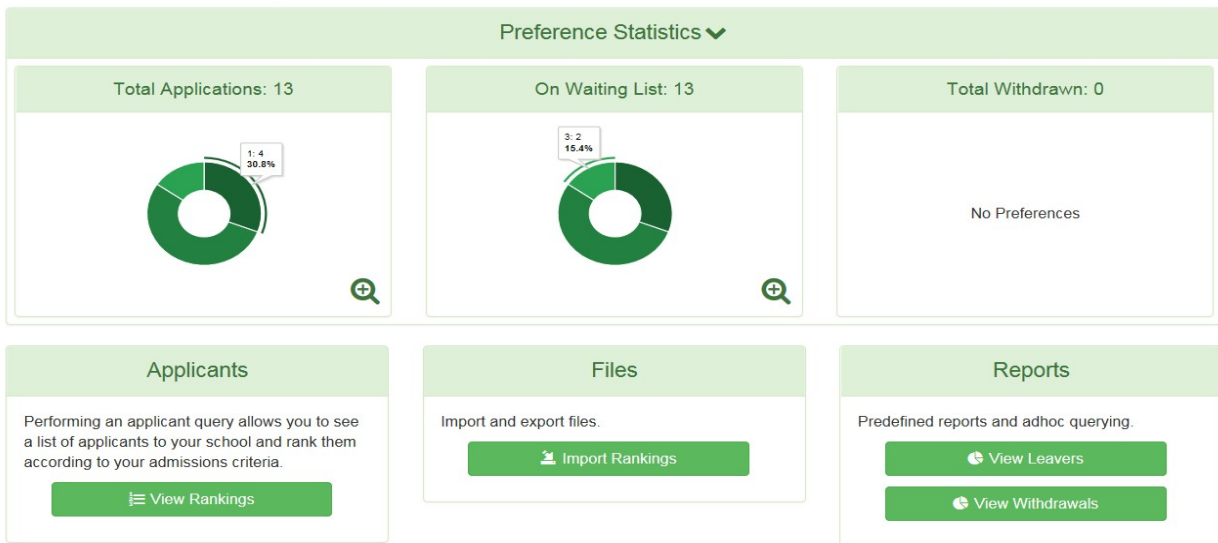
Clicking on each segment of the pie chart will show you how many first second and third preferences have been made for your school. You can also 'zoom in' to provide a closer look at the preference breakdown by clicking on the magnifying glass icon in the corner.
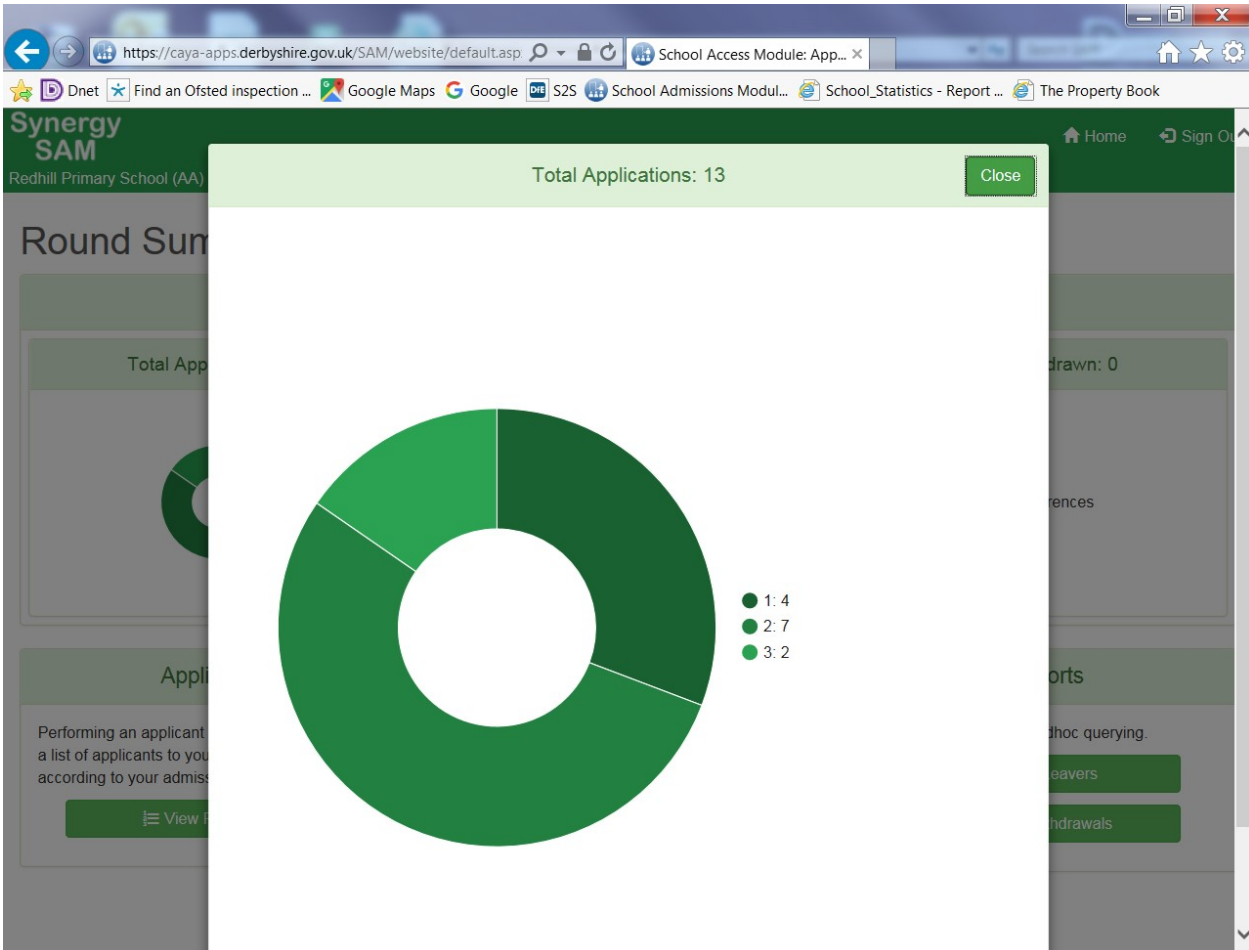
This home page provides a summary of the preferences for your school:

Total Applications - this shows how many pupils have put your school somewhere on their application form (this could be either the first, second or third preference).

This figure is broken down to enable schools to view how many first, second or third preferences they have.

Total Applications on Waiting List - this shows how many pupils are waiting to be allocated a place at your school.

Total Withdrawn Applications - this shows the number of pupils whose preferences for your school have either been withdrawn by the parents or where it has been possible to offer higher ranked preferences at other schools.

PLEASE NOTE: these figures will not be fully representative of the situation at your school until the allocation process is complete.

7. Numbering Criteria

All criteria are given a numeric number or text description as previously agreed with your school and published in the "How to apply for a place at primary/secondary school - a guide for parents". Please note all pupils with statements or EHC plans should be given the criteria number of 0 or SEN.

These are the criteria that must be assigned to individual preferences. If you are unsure please contact the Admissions and Transport Team.

8. Assessing Preferences and Adding Criteria On Line

By clicking on the "View Rankings" icon in the "Applicants" area you can view all those pupils who have made a preference for your school.

This screen should now appear:

Synergy SAM
Redhill Primary School (AA) • 2017-18 Reception Intake

Actions ▾   ▼ Hide Options   ↗ Collapse Header   ☰ Round Summary   ⤷ Sign Out

Options ✕

🔍 Search   Collapse All ▶

Highlight Preferences: ▾

Changed between
19/12/2016

and
19/12/2016

Display: ▾

◉ Unranked ○ Ranked

Late Preferences: ▾

☑ Include Late Preferences

Page Size: ▾

○ 500 ○ 250 ◉ 75 ○ 25 ○ All

Filters: ▾

☐ SEN Claim
☐ Looked After Claim
☐ Crown Service Claim
☐ Multiple Birth Claim
☐ Sibling Claim
☐ Social/Medical Claim
☐ Staff Claim

Unranked Applicants

There are 5 records matching the current selection and 30 Places available.
Showing applicants 1 to 5 of 5.

List Position	Select	Name	Criteria	Distance
	☐	Feetham, Martha Elizabeth		
	☐	Greham, Merle Gracie		2.882
	☐	Peach, Martha Rose		1.392
	☐	Warren, Scarlett Tess		1.373
	☐	Yorke, Jocelyn Olivia		

Screen view - The screen will automatically default to the unranked list and show 75 pupils per page (this can be amended by using the appropriate radio buttons). You can also use the "Display Options" area to change the fields that are viewed on this screen. Not all of the options are used by us but the fields that can be added and taken away which are used are sibling, looked after, DOB, SEN, current school, gender, reason text indicator and *catchment school indicator*. These filter options are now positioned in a new options section that can be collapsed/expanded on demand. Please note that on smaller devices, the options are hidden by default, and can be accessed by clicking/tapping the 'Show Options' button that will appear in the navigation bar.

You can see if the preference is classed as the child's normal area in the Admissions System (not relevant to voluntary aided secondary schools). If this is the case, the field will show "Yes". Should you have any queries relating to whether a child is in your schools normal area, please contact the Admissions and Transport Team.

Viewing preferences – once you have your screen view personalised you can begin to look at the details on each individual pupil's preference. Click on a pupil record to view the information available. Pupils who have submitted a late preference have a red exclamation mark on the left hand side of their preference to indicate this (you can also see this by looking at the rank of the preference by clicking pupil to view their preference details).

Please note that a 'claim' is made when the parent ticks the associated box on the application but will need to be verified before being accepted. All SEN, Looked After and Sibling claims are verified by the Admissions and Transport Team and when these

options are selected in 'Display Options' you will see in the column next to the 'claim' whether they have been accepted or rejected (for example a sibling claim may be rejected for a primary school if the sibling is in Y6 and will not therefore be in attendance when the younger child starts).

Assigning a criteria – there are four automatic filters you can use to filter those pupils who have a sibling, have a statement of SEN or EHC Plan, are In Care or to include them if they are a late preference. Once you have clicked on one of these filters the system will automatically display pupils who have that specific marker in their preference.

Using SEN as an example, you will notice that the "Default Criteria" drop-down box has defaulted to "0" (SEN pupils must be given this criteria number to denote SEN). As our co-ordinated scheme reserves pupils with a statement their preference pending consultation, all SEN pupils should be assigned to this criteria.

To do this you can either:

1. Click in the "Criteria" box within the preference and select the appropriate criteria, then click on the "Assign Selected" icon above the preferences in the Actions dropdown or
2. Tick the "Select" box on the left of the record, check the criteria is correct, and click on the "Assign Selected" icon above the preferences in the Actions dropdown.

These preferences will have now moved onto the "Ranked" screen. Remember to remove the filter and ensure that you are on the "Unranked" screen to continue assessing preferences.

Once back on the screen with the remainder of the unranked preferences you need to repeat the process until all preferences have been given criteria and have been transferred to the "Ranked" screen.

Once you have assessed your higher criteria you may be left with a larger group of preferences all falling into a lower criteria. To allocate these all at once, ensure your "Default Criteria" is appropriately selected and click on the "Assign All" icon above the preferences in the Actions dropdown. You will then get a warning message asking you to confirm your action – if you are happy to continue click on "Confirm Assign All" otherwise click on "Cancel".

Once you have assigned criteria to all your preferences the screen will default to the "Ranked" view – here you should be able to see all the preferences and the criteria you have assigned them.

You can log on to SAM and assign criteria at any time from the system going live and you do not have to do all of them at once!

Should you wish to have an Excel spreadsheet of your schools preferences, you can click on the Export to Excel icon located in the Actions dropdown. You can now tick the "Export All Fields" option.

9. Ranking Preferences On Line

Note of caution - we would strongly advise not to rank your preference list until you have been advised by the Admissions and Transport Team that all preferences for your school have been received and entered on the Admissions System.

Available on this screen is "Order By" which defaults to list position. At this stage, click on the drop-down box and change this to "Criteria" (this will return the list in your criteria order – for those on the same criteria, preferences are then listed in distance order).

To rank the list, click on the "Generate List Position" icon – this will give all the preferences a place on your ranked list - and you will get a warning message asking you to confirm your action – if you are happy to continue click on "Confirm Update Positions" otherwise click on "Cancel".   You will notice that all the pupils now have a list position in their preference which indicates to the Admissions and Transport Team in which order they should allocate places at your school. The preferences are automatically updated in the Admission and Transfers System.

Please remember that all late preferences should be ranked in order at the bottom of your list, after those that have made an on time preferences.

Should you wish to alter the order of the "Ranked" list, enter the number of the position you want the preference to be at and select "Save Updated Positions". If you are putting a preference to the bottom of the list you will have to enter a number one more than the last preference (i.e. if you have 10 preferences and you want to put a late at the bottom of the list, enter the number 11 in the field).

Should you be unhappy with your assessment and wish to clear everything and start again, you can do so by clicking on the "Unassign All" icon – this will clear all your criteria and rankings enabling you to begin again. You can also clear individual preferences (i.e. if new information on a preference comes to light and you wish to reassess) by selecting the individual pupil (using the tick box) and clicking on the "Un-assign Selected" icon. These preferences will now be back on your "Unranked" list awaiting reassessment.

Once you have completed the assessment and ranking you should notify the Admissions and Transport Team by email that your ranked list is complete. The deadlines for submission of assessed and ranked preferences are published in the Admissions Timescales documents published on the Derbyshire SchoolsNet.

Once these dates have passed you will no longer be able to add or amend criteria or rankings for preferences without being given access by the Admission and Transport Team.

For primary phase schools with pupils applying to transfer to Y3 or Y6 you can select the junior intake round (infant schools) or the secondary intake round (junior and primary schools) and view if your pupils have applications on the Admissions system (please be aware with the large number of forms requiring entry there may be a small backlog). Pupils applying for a secondary school place who are not resident in Derbyshire will not have an application showing on the system until after the closing date and then only if they have applied for a place at a Derbyshire school.

Click on the "View Leavers" option in the "Reports" area.

The screen should now refresh and show all pupils at your school in the round and indicates in the "No. of Preferences" column how many preferences they have made.

11. Viewing Pupils at Your School - which school have they been allocated?

Once the allocation process is complete and the Admission and Transport Team have released the allocation information you will be able to view the destinations of your pupils. **PLEASE NOTE:** this information is strictly confidential until the appropriate offer day and must only be conveyed by the Admission and Transport Team. It must also be remembered that the place allocated at this time to a pupil may not be the final destination for the pupil in September (parents may change their mind or be successful at appeal for another school).

From the home page, click on the "View Leavers" option in the "Reports" area and you should be able to view your school's pupils in the round and which school they have been allocated.

12. Viewing Your Schools Final Allocation List

Once the allocation process is complete, the Admission and Transport Team will release allocation information, allowing schools to view details of the pupils that have been allocated a place.

On your schools home page, click on the "View Final Offers" report:

You should now be able to view a list of pupils who have been allocated a place at your school.

Clicking on the column headings will sort the list by that order.

You can view more pupil details in the table view by clicking on 'Actions' in the green tab at the top of the page and select "Display Options":
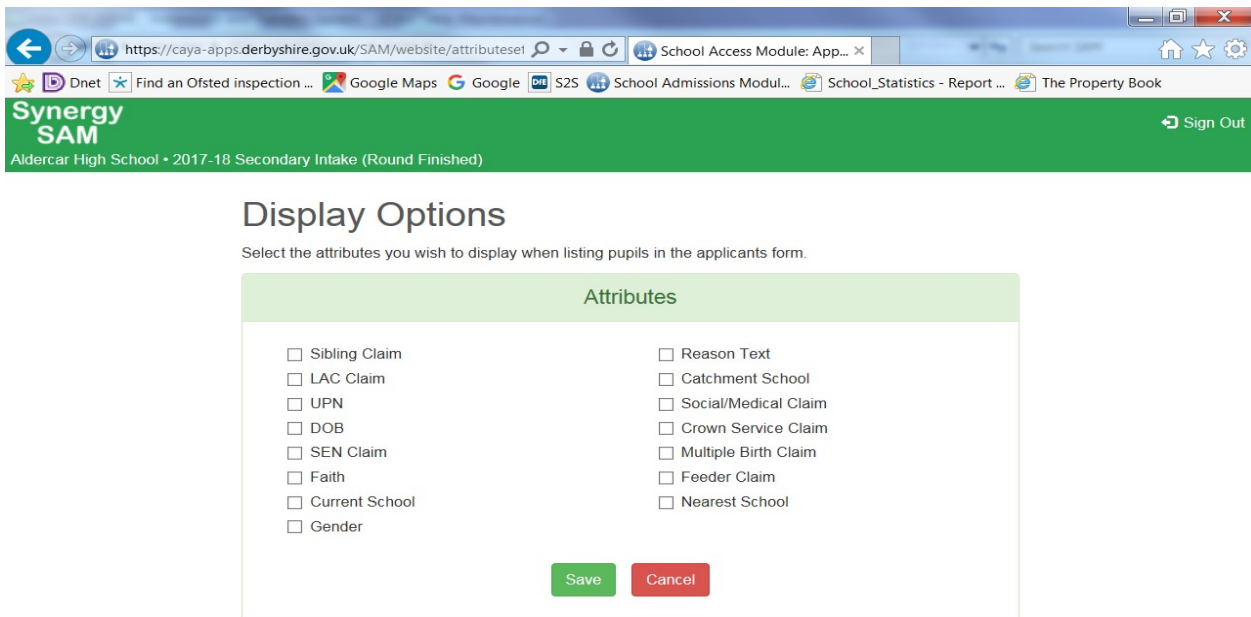
Once you have ticked the attributes you wish to include in your table view, click on the "Save" button and you will be returned to your amended table view.

We would advise that you check this screen on a regular basis to check for any changes in allocated school.

13. Allocation Lists - pupil data for school systems

Once the allocation process is complete the Admission and Transport Team will release the allocated lists via SAM.   You should be able to download this ATF and import it into your schools management information system. You may wish to delay importing your ATF into your MIS so that details of any leavers and new additions are captured within the file. If you import your ATF and then receive notification of a new pupil, it may be simpler just to extract the data you require and enter it manually.

Once the allocation information is released the SAM homepage screen will have additional facilities - the important ones are:

Export ATF - clicking on this icon will export your allocated pupils in an ATF.

View Withdrawals - this shows you pupils who have withdrawn from a previously allocated place at your school.

View Leavers - this is only applicable to primary phase schools with pupils transferring onto junior or secondary education. Previously you could use this area to check if pupils at your school had made an application. Now allocation lists have been released these lists now also show the destinations of pupils at your school.

14. Notification of Changes

The process for the notification of changes works as follows:

1. Where changes are made to pupil school allocations (higher ranked place becomes available, parents withdraw from admissions process completely, and appeals are   successful), the Admission and Transport Team will email schools to   alert them to changes in their allocation lists.

2. Schools should check SAM for the pupil details. Receiving schools can then use the pupil's record on SAM to enter details into their management information system.

3. Schools should then check SAM on a very regular basis for changes to their allocation list. Please note, once a pupil has had their preference withdrawn they will no longer show on your schools "View Final Offers" report (they will show on the "View Withdrawals" report instead). The "Preference Statistics" section on the home page makes it easy to see how many withdrawn applications your school has.

4. Schools with pupils transferring should also check the "View Leavers" report regularly to ensure they know the correct destination school for their pupils.

If at any time you have any queries about allocations and withdrawals, please do not hesitate to contact the Admission and Transport Team.

15. Waiting Lists

Once the allocation information is available through SAM you will also be able to view those pupils on your schools waiting list by clicking on the "View Waiting List" icon in the "Reports" area. Following offer days, the late preferences which were at the bottom of your ranked list will, where possible, have been merged into the waiting list by the Admission and Transport Team.

 If after viewing you waiting list you are happy with its order, please email the Admission and Transport to confirm this. If not, please e-mail the necessary changes.