

Academy Conversion in One Education

When a school converts to an academy, you must either create a new base record for the school or update the school's existing record so that B2B can process incoming information from the school correctly.

This document provides advice to ensure that incoming school information (e.g. attendance and school history) can still be processed after the conversion, and that this information will reflect correctly for both the new academy and the pre-conversion school.

The One Education academy conversion process varies depending on whether the school has become a converter academy or sponsor-led academy, and whether schools that become sponsor-led academies use a past or future conversion date. This process is illustrated in the *Academy Conversion Process Diagram* flow chart.

Converter Academies (DfE Number Does Not Change)

Converter academies normally retain the DfE number of their original school, with only the school's name changing. If the school's DfE number does not change, the base name should be updated to that of the new academy using the Bases module in either v4 Client or v4 Online. There is no need to create a new base record.

In some cases a converter academy's DfE number can change. If the academy's number changes, follow the process outlined in *Sponsor-Led Academies (DfE Number Changes)*.

Sponsor-Led Academies (DfE Number Changes)

Sponsor-led academies are assigned a new DfE number. Therefore, a new base record with the correct LA number and new DfE number is required for the academy, in order to avoid corrupting any historical information.

Timing

If possible, make the change during the summer holidays. Conversion at the start of an academic year can potentially cause problems when trying to maintain existing student records while presenting the new identity to those applying for a place at the new academy.

If you are using the Admissions module and are unable to create the new record before the applications window opens, create the new record and then edit preferences for children who are due to start school in the next academic year so that any preferences for the old school point to the new academy instead.

For more information on editing preferences, refer to the *Preferences* help topic in A&T Back Office.

Once you have created the new base, use B2B:Student to transfer students across. If you do not have a B2B:Student licence, transfer students using the **Base Merge** routine.

If B2B:Student is licenced:

1. Create a new base record in either v4 Client or v4 Online. For more information on creating bases, see the *Adding a New Base* section of the *Bases v4 Online* handbook.
2. If B2B:Student has been migrated to Phase 2, configure the base as a B2B:Student base:
 - a. In the Bases module, select the **B2B:Student base** check box to display the **Users()** dialog.
 - b. Select the appropriate B2B:Student base user.
3. If B2B:Student has not been migrated to Phase 2, ensure that the **XML Transfer base** check box is selected.

4. Ensure that:
 - all scheduled tasks are disabled within SIMS.
 - all remaining B2B conflicts are cleared.
 - all current admissions preferences are re-associated to the new base.
5. Request and apply SIMS patch 15913. This patch displays the **Change School Details** option in SIMS.
6. Use the SIMS **School Name Change** utility to change the name, LA number and Establishment number of the school.

For more information on using the **School Name Change** utility, see the *School Name Change Utility* document, available from www.simspublications.com.

7. In SIMS, select **Focus | School | School Details** and enter **Previous School Name**, **Date Name Changed**, **Previous Establishment Number**, **Date (Establishment) Number Changed**, **Previous URN Number** and **Date (URN) Number Changed** details as required.
8. If the changes are made on the same date as the conversion date:
 - a. Run an immediate B2B:Student task in SIMS. Select all four options in the **All Students** section of the **Filter Data** menu and select **Current Year** from the **Attendance** menu.

For more information on running an immediate B2B:Student task, see the *Creating and Editing an Immediate Task* section of the *Managing B2B:Student* handbook, available from www.simspublications.com and [My Account](#).
 - b. Process the imported information within One Education, resolving any data conflicts.

For more information on resolving conflicts in One Education B2B:Student, see the *Matched with Conflicts* section of the *One B2B:Student* handbook, available from www.onepublications.com and [My Account](#).
 - c. Run the **Exclusions SQL** script to identify any overlapping exclusions records based on date information. This script is available from the One Education Application Support team.
9. If the conversion date is in the past:
 - a. Run an immediate B2B:Student task in SIMS. Select all four options in the **All Students** section of the **Filter Data** menu and both **Current Year** and **Previous Year** from the **Attendance** menu.

For more information on running an immediate B2B:Student task, see the *Creating and Editing an Immediate Task* section of the *Managing B2B:Student* handbook, available from www.simspublications.com and [My Account](#).
 - b. Process the imported information within One Education, resolving any data conflicts.

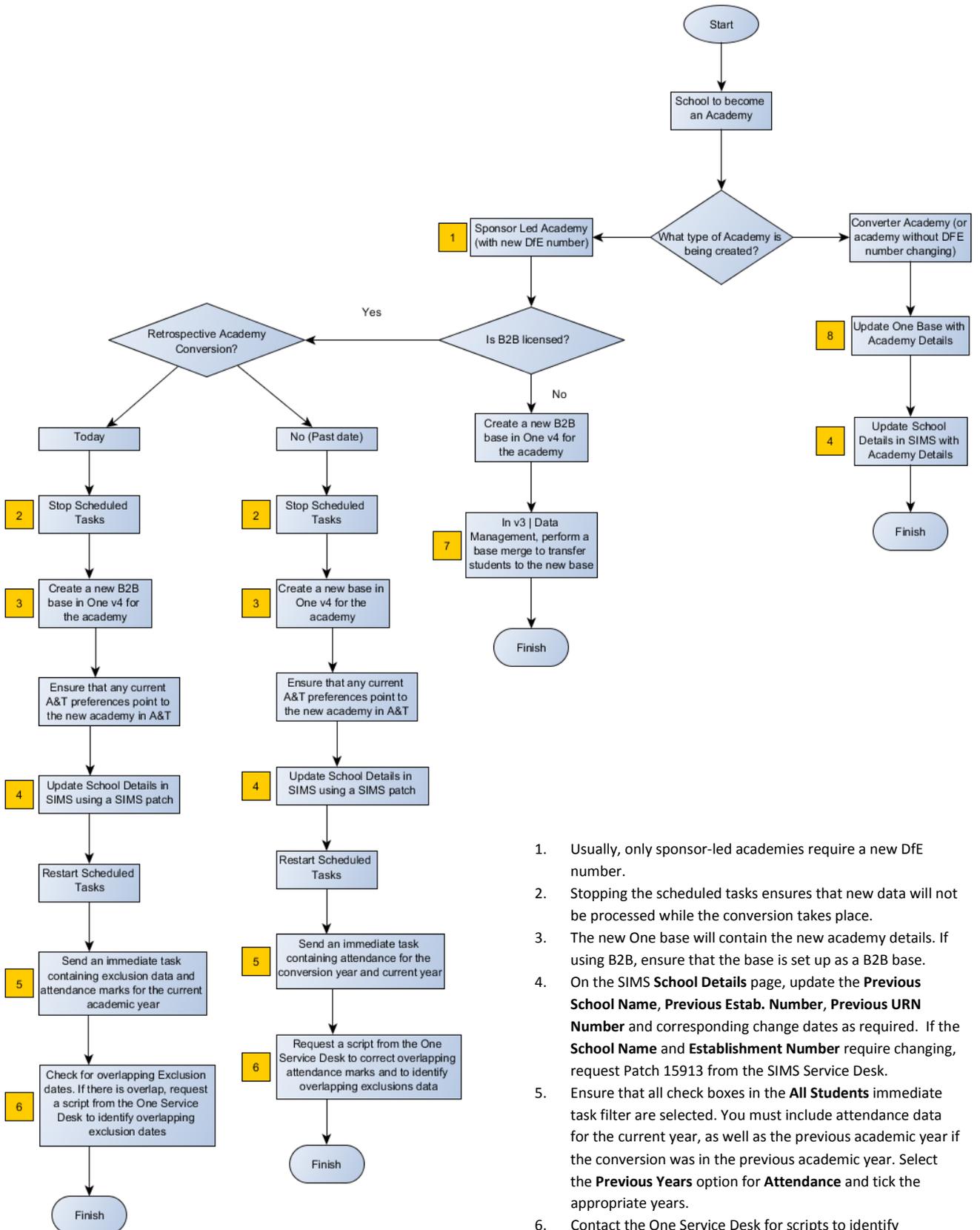
For more information on resolving conflicts in One Education B2B:Student, see the *Matched with Conflicts* section of the *One B2B:Student* handbook, available from www.onepublications.com and [My Account](#).
 - c. Run the **Exclusions SQL** script to identify any overlapping exclusions records based on date information. This script is available from the One Education Application Support team.
 - d. Run the **Attendance SQL** script to change any overlapping attendance marks from their current value to **Z (Not Enrol)**. This script is available from the One Education Application Support team.
10. Re-enable scheduled tasks within SIMS. The conversion process is now complete.

If B2B:Student is not licenced:

1. Create a new base record in either v4 Client or v4 Online. For more information on creating bases, see the *Adding a New Base* section of the *Managing Bases* handbook, available from www.onepublications.com and [My Account](#)
2. Go to **v3 Module Launcher | Tools | Data Management | Base Merge**. Enter the **Source** and **Destination** base and transfer students to the new academy base.

NOTE: Ensure that the **Transfer Date** is set to either the system date or a previous date

Academy Conversion Process Diagram



1. Usually, only sponsor-led academies require a new DfE number.
2. Stopping the scheduled tasks ensures that new data will not be processed while the conversion takes place.
3. The new One base will contain the new academy details. If using B2B, ensure that the base is set up as a B2B base.
4. On the SIMS **School Details** page, update the **Previous School Name, Previous Estab. Number, Previous URN Number** and corresponding change dates as required. If the **School Name** and **Establishment Number** require changing, request Patch 15913 from the SIMS Service Desk.
5. Ensure that all check boxes in the **All Students** immediate task filter are selected. You must include attendance data for the current year, as well as the previous academic year if the conversion was in the previous academic year. Select the **Previous Years** option for **Attendance** and tick the appropriate years.
6. Contact the One Service Desk for scripts to identify exclusions and attendance marks with overlapping dates.
7. **Base Merge** transfers students to a new base. You are able to specify a transfer date. Ensure this field is set to a past or present date and matches the conversion dates specified in SIMS.
8. As you will not be creating a new base in One v4, you may wish to create a UDF field in One to retain the details of the original base.

Early Years Academy Conversion Advice

In the Early Years module, each provider links to a base created in the One Education v4 Client via **Focus | Early Years | Search for Provider | Linked Base** (Provider Entity where Entity Type is a 'Base').

The screenshot displays the '01. Basic Details' form. The fields are as follows:

Provider Name	St Marks		
Entity Type	<input type="radio"/> Base <input type="radio"/> Person <input checked="" type="radio"/> Establishment Revise		
Provider ID	50009	Base URN	567231
Provider Entity	St Marks	Detail	
Linked Base	St Marks	Detail	
Address	17 Prebend Street, Bedford, MK40 1QN		
Email	stmarks@estblshmnt.com		

If the base linked to the provider has become an academy or the provider will be merging with an academy, the base against the provider may need changing.

Note: Changes are only needed if the school number against the provider base needs to change as part of the academy conversion. i.e. a sponsor-led academy. If the provider is not linked to an academy or already has the correct school number, you do not need to make any changes.

If the provider base needs to change, there are a number of scenarios that will dictate how the provider links to the new base.

- Where the provider base needs to be changed to that of an existing academy with children already against the academy base

The base merge routine will need to be used. This will transfer all children against the base so they are linked to the new academy base. This means the school history will record an end date for the original base and new start date for the academy base.

To update the base against the provider, you will need to contact the One Application Support team quoting KB477580. They will supply a script to make the change.

- Where the provider base needs to be changed to that of a new academy where no children are currently against the academy base

Firstly the base linked to the provider will need to be changed to the new academy base. Select **Revise** and change the **Linked Base** where the type is **Person** or **Establishment** or where **Entity Type** is a **Base** select **Provider Entity**.

Once changed, the base merge routine will need to be used. This will transfer all children against the base so they are linked to the new academy base. This means the school history will record an end date for the original base and new start date for the academy base.

- Where a base record in One Education is shared with a provider as well as a school

If a base record in One Education is shared with a provider as well as a school, do not make any changes until the school has followed the academy conversion advice on pages 2 and 3. This will depend on whether they use B2B or not. Once this process has been completed, children against the provider will now be against the new academy base.

The base against the provider will now need updating. You will need to contact the One Application Support team quoting KB477580 to be supplied with a script to make the change.

SEN2 Return counting Academies

If a child or young person with an active EHC Plan or SEN Statement is placed or transferred in to an academy then SEN2 will count this.

Placement/transfer records can be created from in the One Education v4 via **Focus | People | Students | Select Student | Involvements | Select Involvement | Placement/Transfer**

When a placement/transfer record is created, users select the base that the child or young person is going to be placed in. They should then select the relevant **Placement Type** which can be an academy.

The value in **Placement Type** field is linked to an external code - some of which denote the school is an academy. Some examples of academy placement types and their respective external codes are below

NOTE: This is not the full list of placement types that are academies.

Final Question Ref.	Placement Category	Associated One Placement Type External code
1.2.1.e	Mainstream school: Academy	E_ACD
1.2.1.f	Mainstream school: Academy (SEN unit)	E_ACS
1.2.1.g	Mainstream school: Academy (resourced provision)	E_RAC

If the SEN2 logic is satisfied for a placement/transfer record to be counted (for example, if it's a placement/transfer record attached to a child or young person that has an active EHC Plan or SEN Statement), then it will automatically be picked up by SEN2 when it is run.

Full details on the SEN2 logic can be found in the *Special Educational Needs SEN2 Statutory Return Business Rules and Exception Messages* document, available from the One Education Publications website (<http://www.onepublications.com>).