

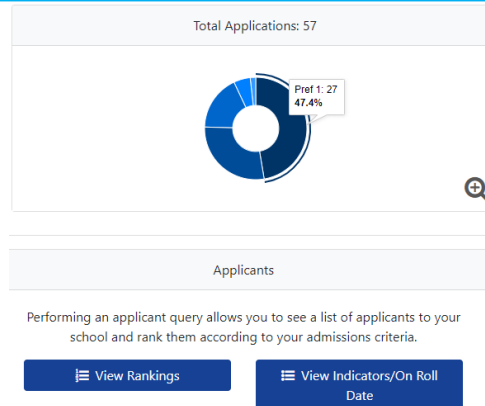
# SAM: Applying Criteria

## AA Schools - Applying a criterion to a pupil's application

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

Select the **View Rankings** option from the Applicants Section.

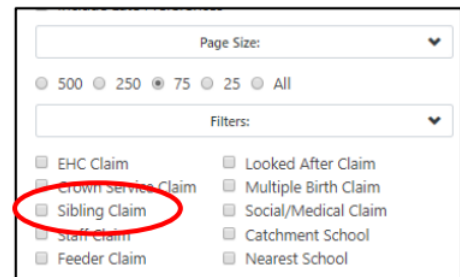
You will automatically be taken to the 'Unranked Applicants' screen.



### FILTERING, HIGHLIGHTING AND ORDERING THE APPLICANT LIST

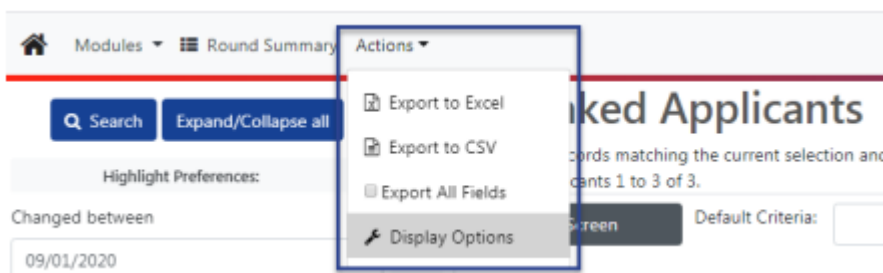
The Options panel on the left can apply filters and ordering:

- **Highlight Preferences** enables you to highlight preferences changed between the dates specified.
- **Display** defaults to Unranked Applications. Selecting the Ranked radio button will display your ranked applicants.
- **Late Preferences** will default to include all late preferences, clear the check box to remove late preferences from the grid.
- **Page Size** allows you to control the number of applications which can be displayed.
- **Filters** allows you to filter your applications by the 'claim' made by the parent or carer.
  - **Catchment school** filter will confirm the children who reside in your catchment area.
- **Order By** enables you to select the order in which applications are displayed, this can be useful for when viewing ranked applications.
- The Options can be hidden by clicking **Hide Options**. To reveal the Options click **Show Options**.



### DISPLAYING ADDITIONAL APPLICANT INFORMATION

You can also define the columns you wish to be displayed in the grid area by selecting **Display Options** from the **Actions** drop-down menu on the Navigation bar.



Using the check boxes select the attributes you wish to display and click **Save**.

# SAM: Applying Criteria

## Display Options

Select the attributes you wish to display when listing pupils in the applicants form.

Attributes

Sibling Claim

LAC Claim

UPN

DOB

EHC Claim

Faith

Current School

Gender

Reason Text

Catchment School

Social/Medical Claim

Crown Service Claim

Multiple Birth Claim

Feeder Claim

Nearest School

Save
Cancel

The selected columns will now be displayed against both your Ranked and Unranked applicants. The attributes you choose are stored against your sign in details, so the next time you access SAM your selections will be restored.

To view additional details relating to the Applicant, for example, name, address, school or sibling, click the applicant's table row. This will open the Pupil Details dialog displaying a summary of their application.

Pupil Details ✕

Application Reference	926-2019-09-K-000050
Name	Ahmad Rodrigues
UPN	L926110617015
DOB	24/05/2006
Gender	Male
Current School	Unknown
LAC Claim	No
EHC Claim	No
Crown Service Claim	No
Multiple Birth Claim	No
Preference School	The Free School (Norfolk)
Distance	1941.65
Address	385a Hall Road, Norwich, Norfolk, NR4 6NF
Admissions Address Verified	No
Social/Medical Claim	No
Catchment School	No
Feeder Claim	No
Nearest School	No

Supporting Evidence

Description	File Name
No Documents Uploaded	

Any documents, which have been attached to a preference to support an application, will be visible within the Pupil Details dialog.

- Click **Download** to retrieve the document.

## EXPORTING APPLICANT INFORMATION TO EXCEL

Application / pupil details can also be exported to excel or csv. Select Actions from the top menu and then ensure that **Export All Fields** is ticked (if not left click to select it). Then left click **Export to Excel** or **Export to CSV**.

Actions ▾

- Export to Excel
- Export to CSV
- Export All Fields
- Display Options

From the Downloads popup select the Synergy excel file that has been generated. Please note children with an EHCP claim will be listed under the column Special Educational Needs Claim. NCC will confirm internally if a child has an EHCP and will update this to accept/reject as appropriate. **Only applications marked as ECHP accept should be assigned the E H C P criterion.**

If you want to download all applications to PDF, you can do this by clicking the Admissions Reports button whilst in the Round Summary section and selecting the report called **All Applications Report** and also selecting the format of **Portable Document Format (Pdf)**. Note: If you do not tick the option **Open report after creation**, the report output will be stored in Report History

# SAM: Applying Criteria

Admissions Reports ×

---

Report \* All Applications Report ✓ ▾

Format \* Portable Document Format (Pdf) ✓ ▾

Open report after creation

---

Cancel
Run Report

## ASSIGNING CRITERIA

Criteria are set up by the Local Authority and can be assigned to either individual, multiple or all applicants.

- AA schools can change the **Order By** from the default ordering by Name if required and click Search

Q Search to sort the applicants.

- Use the filters to display only selected records in the grid area.
- Enter criteria within individual records by selecting the relevant criterion from the drop-down list within the record.

### Unranked Applicants

There are 3 records matching the current selection and 3 Places available.  
Showing applicants 1 to 3 of 3.

Full Screen
Default Criteria: E H C
Assign Selected
Assign All

List Position	Select	Name	Criteria	Distance	DOB	EHC Claim	EHC Claim Acceptance
	<input checked="" type="checkbox"/>	Jones, Cody	Sibling	3820.99	23/01/2005	No	No Decision
	<input type="checkbox"/>	Lutz, Melissa	E H C Looked After / Social Reasons	2408.32	06/01/2006	No	No Decision
	<input type="checkbox"/>	Rodrigues, Ahmad	Sibling Distance	1941.65	24/05/2006	No	No Decision

There are 2 ways to apply criteria:

- Select the Criteria from the dropdown individually for each applicant. Use the **Default Criteria** to speed up that process. Then click **Assign Selected** to apply those chosen Criteria to the selected Applicants.
- Alternatively, filter the Applicant list using the filtering **Options** e.g. Sibling Claims. Select a **Default Criteria** and then click **Assign All** to apply that same criterion to all those filtered applicants.

You will be asked to confirm the selection.

### Unranked Applicants

Please confirm you wish to assign the current default criteria to all applicants that do not currently have a criteria assigned.

Confirm Assign All
Cancel

# SAM: Applying Criteria

Once applicants have been given a criterion, 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.

🔍 Search
Expand/Collapse all

Highlight Preferences: ▼

Changed between

and

Display: ▼

Unranked  Ranked

Late Preferences: ▼

## UNASSIGNING CRITERIA

You can unassign criteria from your ranked applicants, if for example, you have ranked an applicant under the wrong criteria, or an amendment has been made to an application.

### Ranked Applicants

There are 3 records matching the current selection and 3 Places available.  
Showing applicants 1 to 3 of 3.

Full Screen
Generate List Positions
Save Changes
Unassign Selected
Unassign All

List Position	Select	Name	Criteria	Distance	DOB	EHC Claim	EHC Claim Acceptance
*	<input checked="" type="checkbox"/>	Jones, Cody	Sibling	3820.99	23/01/2005	No	No Decision
*	<input type="checkbox"/>	Lutz, Melissa	Aptitude	2408.32	06/01/2006	No	No Decision
*	<input type="checkbox"/>	Rodrigues, Ahmad	Distance	1941.65	24/05/2006	No	No Decision

- Select a record and click Unassign Selected from the header bar.
- To unassign all applicants, select Unassign All.

The Ranked Applicants will have the criteria removed and will be displayed in the Unranked Applicants view enabling you to assign the correct criteria.