

SAM (School Access Module)

School Access Module (SAM) User Guide Part 1

For Own Admission Authority Schools (academies, free, voluntary-aided and foundation schools)

This guide covers some of the main processes for Own Admissions Authority Schools for reception, junior and secondary transfer applications. It does not cover all possible functions and may be updated. If you find something not listed in the guide that may be of use to other schools, please inform the School Admissions Team so that this can be included in future editions.

Updated by Croydon School Admissions Team, January 2026

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NB all children's names are fictional.

Logging In

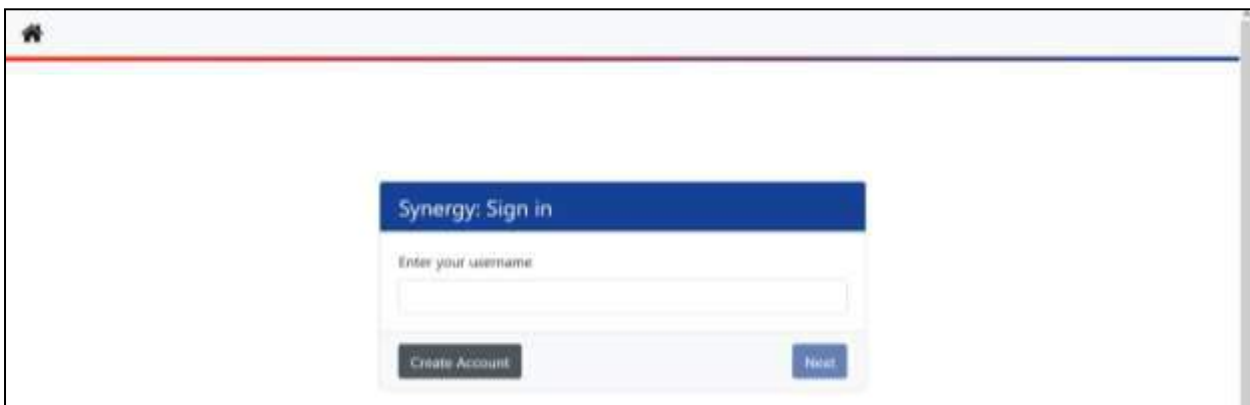
<https://croydon.cloud.servelec-synergy.com/synergy/>

First enter your own specific username and on the next page, your password.

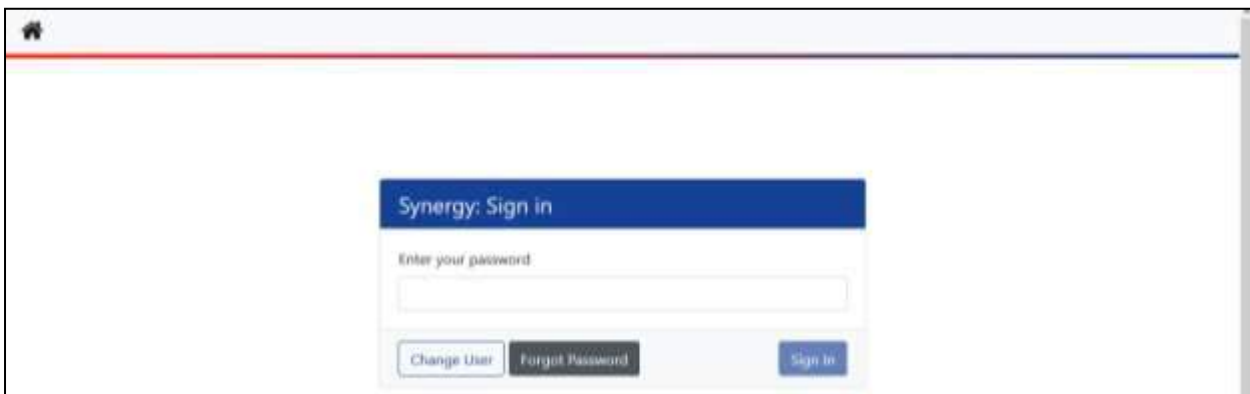
If you have forgotten your password, enter your username and click on the “forgotten password” button. You can then request a password reset code to be emailed to you - enter the code provided and this will open a screen where you can create a new password.

There is a [demonstration video](#) of the process published on the portal.

If a new school user account needs to be set up, please email the school admissions team at school.admissions@croydon.gov.uk providing the name of the person who needs the account, their email address (please note this must be a personal email address not a generic email address that all staff can use) and school contact number. This will be passed to the EDQT team who will send the new account username and login details direct to the new school user.

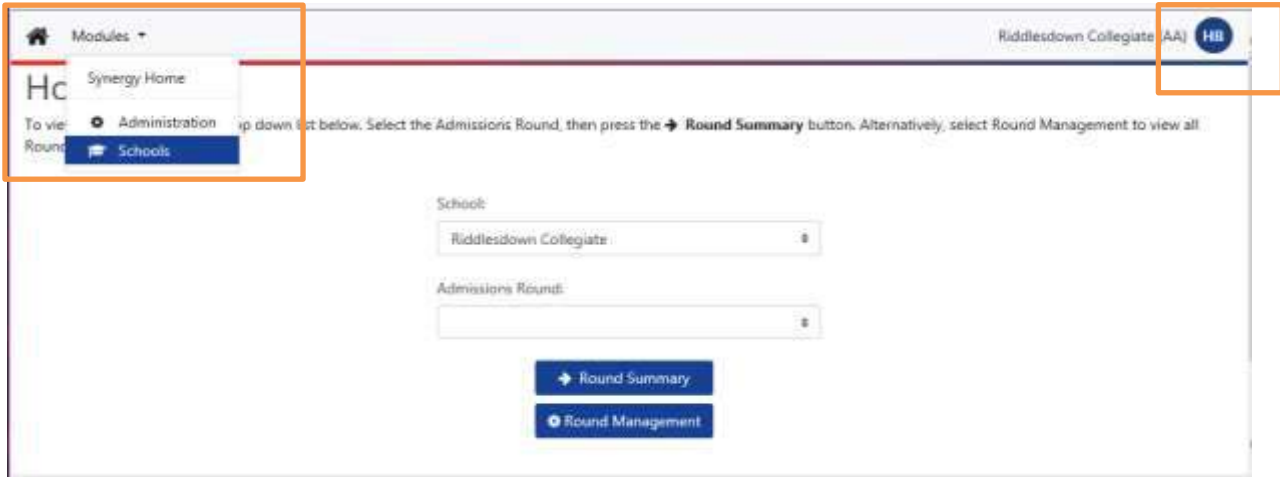


A screenshot of a web browser window showing the 'Synergy: Sign in' page. The page has a blue header with the text 'Synergy: Sign in'. Below the header is a text input field labeled 'Enter your username'. At the bottom of the form are two buttons: 'Create Account' and 'Next'.



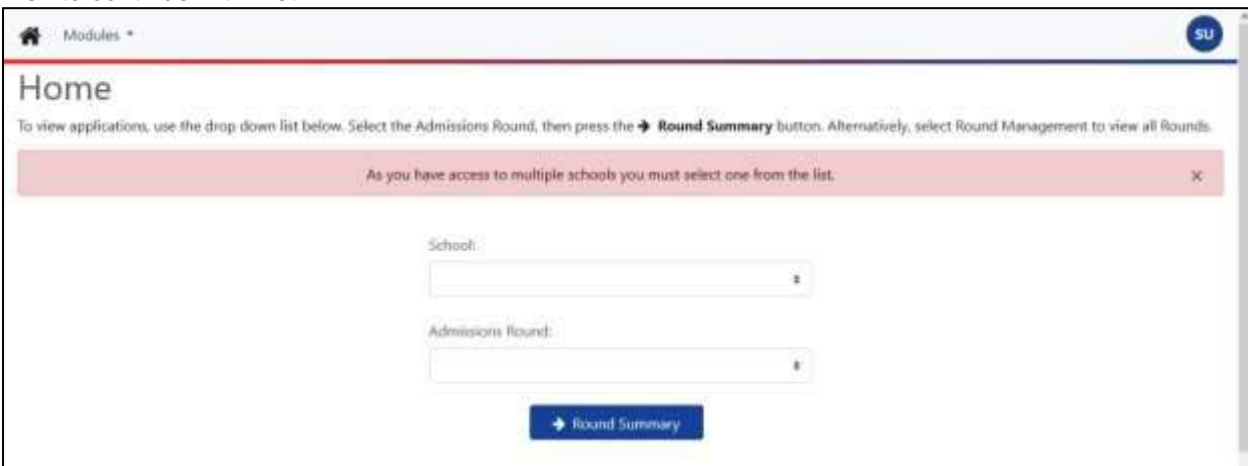
A screenshot of a web browser window showing the 'Synergy: Sign in' page. The page has a blue header with the text 'Synergy: Sign in'. Below the header is a text input field labeled 'Enter your password'. At the bottom of the form are three buttons: 'Change User', 'Forgot Password', and 'Sign In'.

You will then come to this screen. Once logged in, the initials in the right-hand corner are that of the user. Click on the ‘Modules’ drop-down in the top left-hand corner. Click on ‘Schools’.



If you only have access to one school then you will see your school listed in the centre of the page.



If you have access to more than one school then you will see this screen. You will then have to select the school you wish to continue with first.



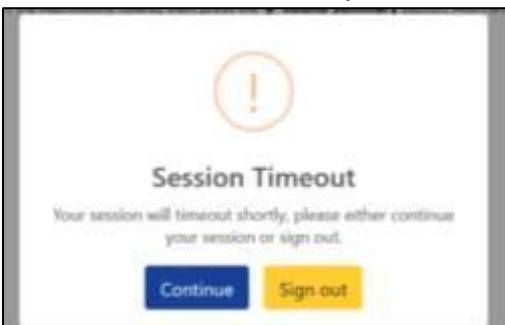
Once in, please check that the name of the school at the top is your school, if it's not, please email the School Admissions team - school.admissions@croydon.gov.uk

Key things to remember

Navigating between pages can be undertaken by clicking on the buttons on the top left corner, depending on what

page is presented.  - home or  Round Summary

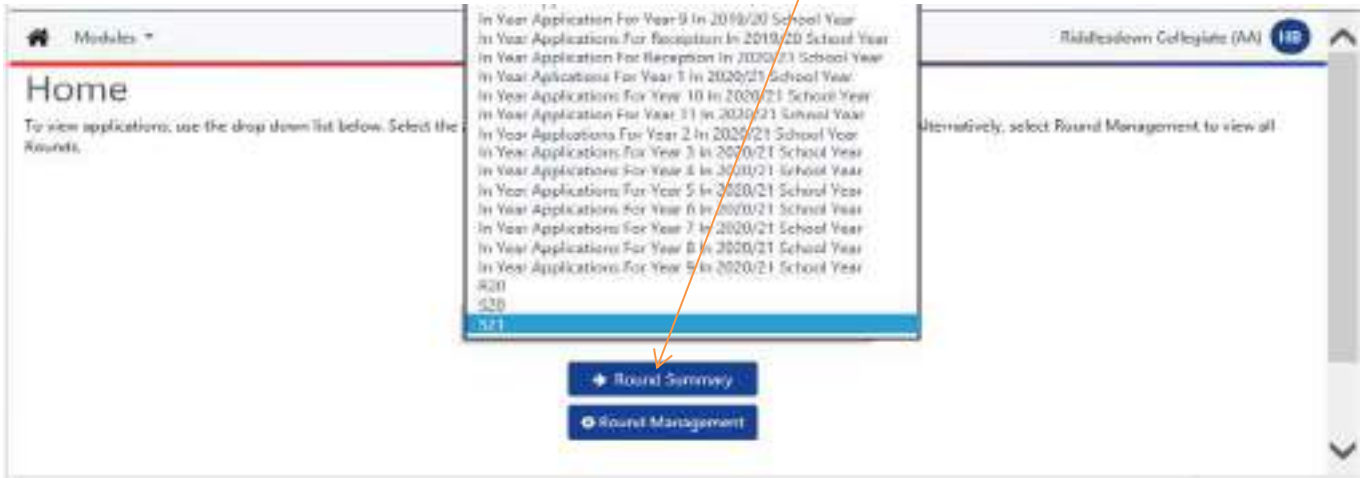
There is a timer on SAM, so after a period of inactivity a message will appear on screen (below) and any work undertaken but not saved may be lost. The timer is approximately 30 minutes.



School admissions work does not all have to be undertaken in one session. However, when performing large tasks such as assigning criteria, it is advised that school users save changes periodically to ensure these are registered.

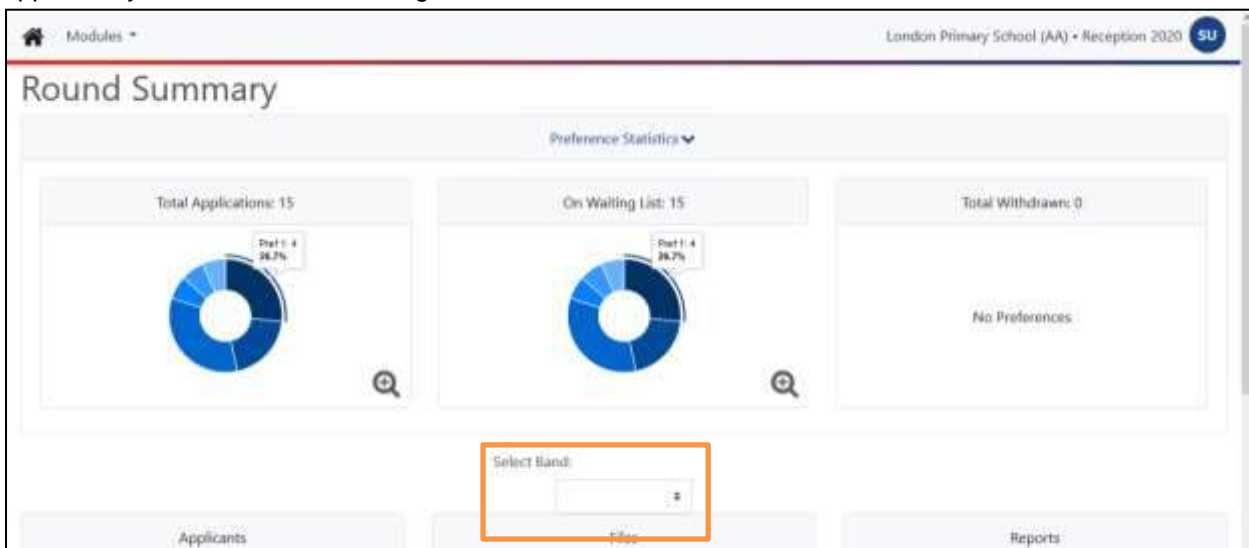
School admissions home page

If the school name is correct, click on the box next to the 'Admissions Round' to choose the desired round then click on the name of the round (e.g R25, S25 etc..) and finally click on the 'Round Summary' button. All active rounds will appear here, even if not relevant to the school.

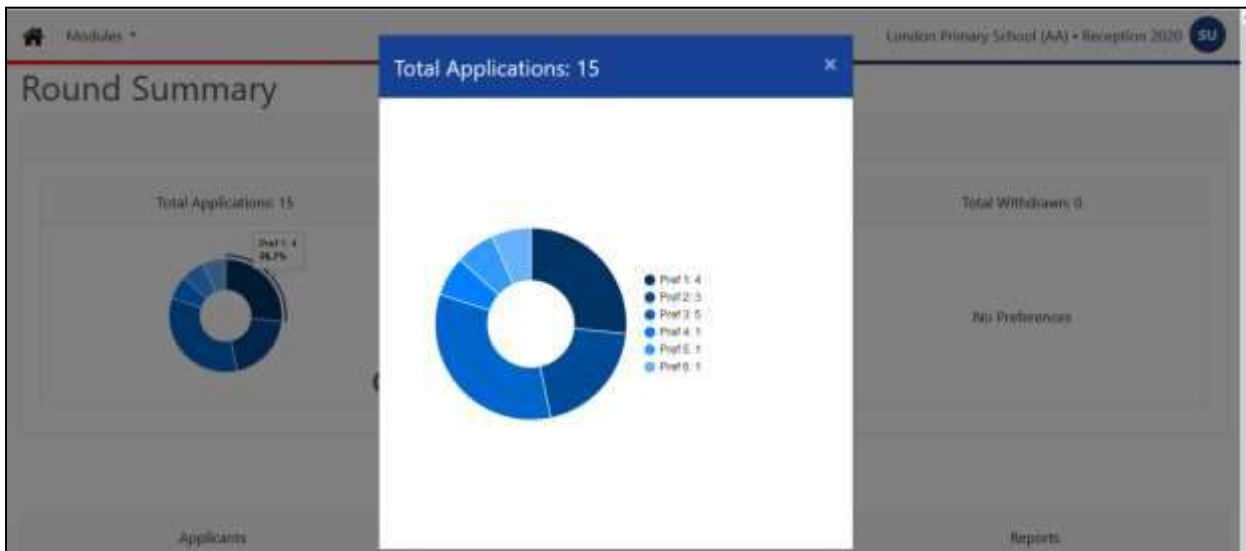


The Round Summary page will show the round at the top of the page to confirm you have selected the correct round. If the round has closed, this will be stated as such (for reception, junior or secondary transfer rounds only). If you have selected the wrong round, click on the 'home' button to go back to the previous page.

This page provides the possible summaries and will change as the rounds progress. **NB** the 'Select Band' box only appears if your school uses banding.



Click on the magnifying glass to get more details of the pie chart.



Total Applications – shows a statistical breakdown of total applications received regardless of their current status (i.e. offered, pending, and withdrawn because offered a higher preference). Please note, you may see instances where the Total Applications number given is *higher* than all of the Preference 1 to 6 applications combined. This is because you may have received applications which have now been withdrawn from the process entirely (e.g. because the family moved out the area), or more commonly, because you have received *late applications*. Late applications are counted towards the total figure, but are not assigned an on-time Pref 1 to 6 rank.

Waiting List – shows a statistical breakdown of those on the waiting list because they have been unsuccessful for a place.

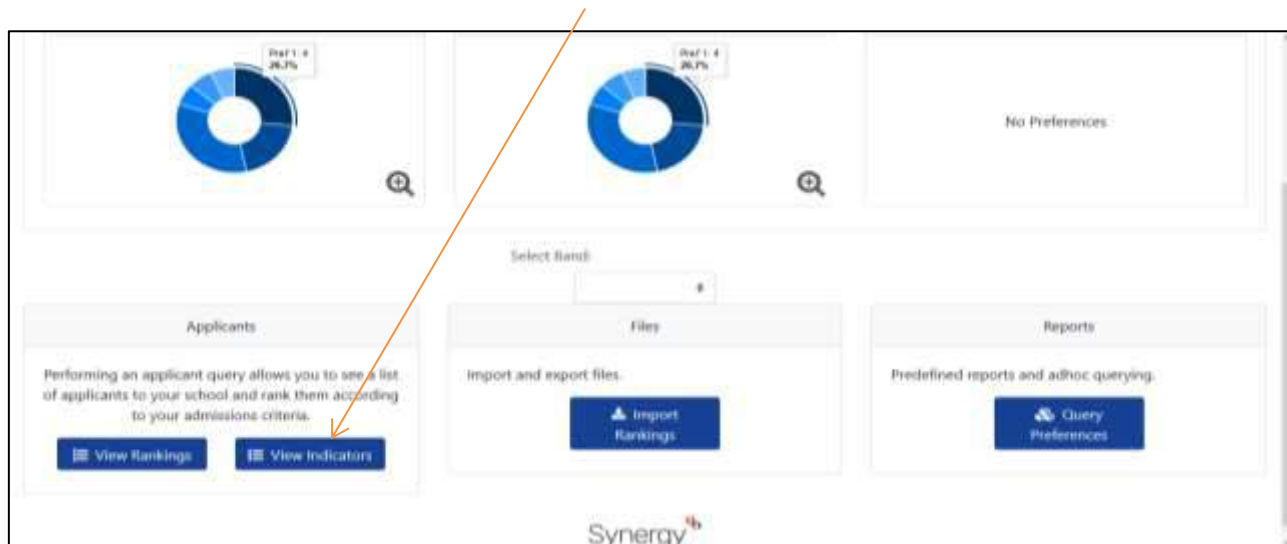
Total Accepted - shows a statistical breakdown of all pupils currently marked as Offered or Accepted. This breakdown is only made available once offers have been made. Please note that applicants that refuse the offer are still temporarily recorded as offered on the local authority’s database.

Total Withdrawn Applications – shows a statistical breakdown of pupils who have been offered a school ranked higher on their application form, or of applicants who may have cancelled their application completely.

Identifying LAC and checking Sibling and Children of Staff Claims

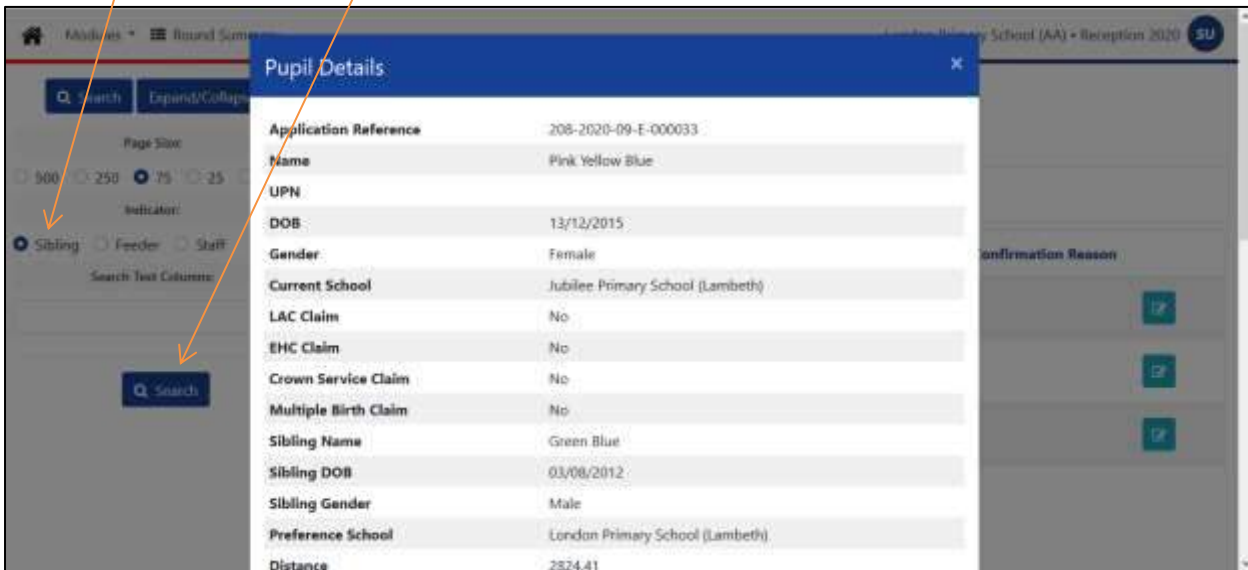
Croydon School Admissions Team **will always verify Looked After/previously Looked After claims**. The method for identifying LAC children, checking children of staff and sibling claims is the same, just choose a different search.

To verify sibling applications, click on the ‘View Indicators’ button at the bottom of the ‘Round Summary’ page.

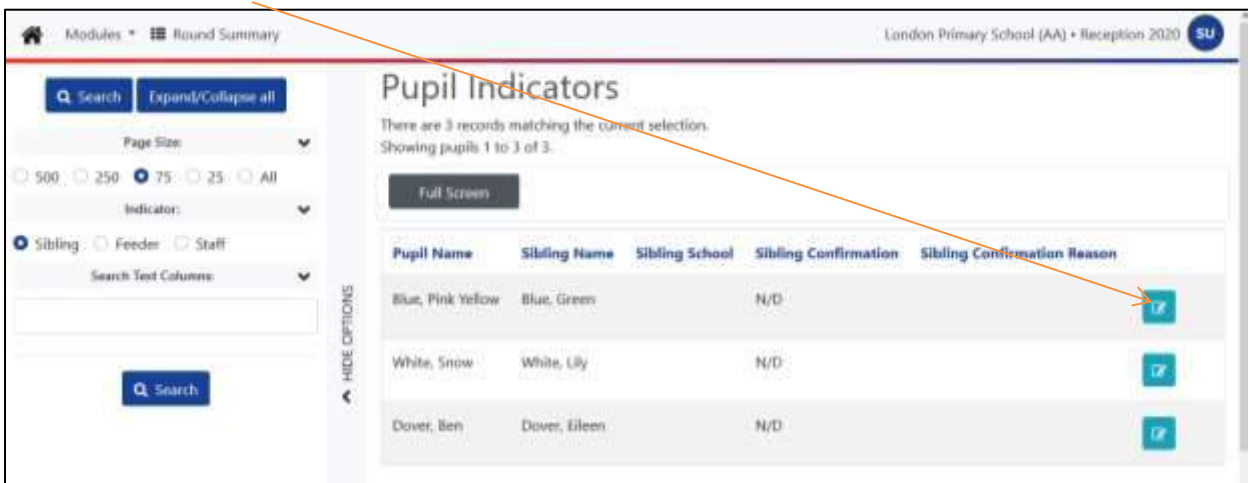


Chose 'Sibling' then click on 'Search' for the details of children who have a sibling listed on their application to appear.

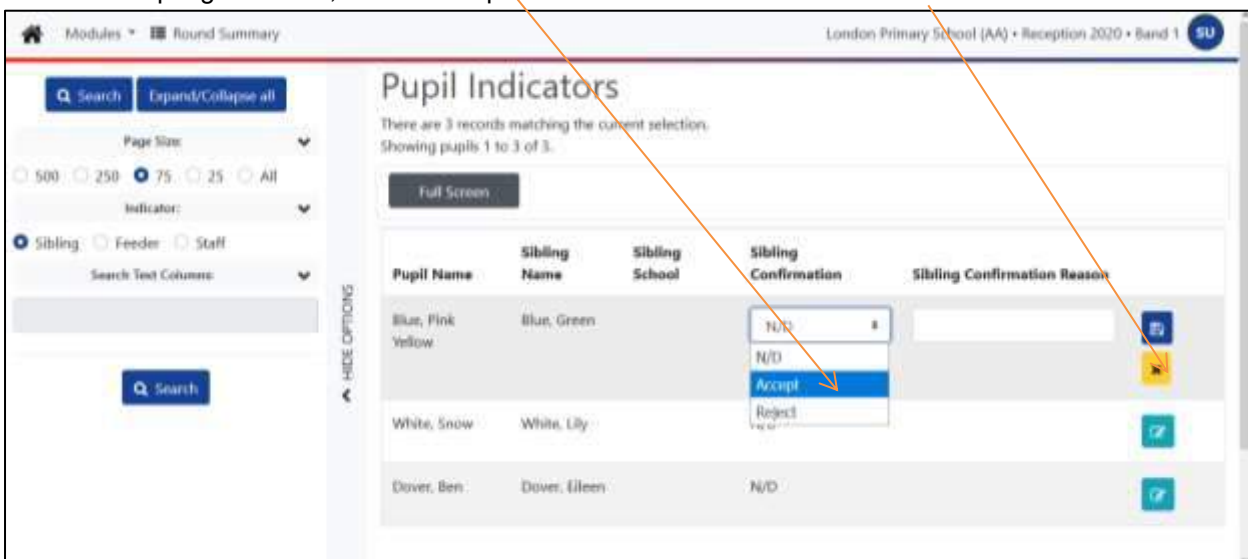
To view the application details – address, parent/carer and sibling, click on the child's name. Scroll down to view all the details received as part of the application.



Then click on the 'Edit' button next to the child.

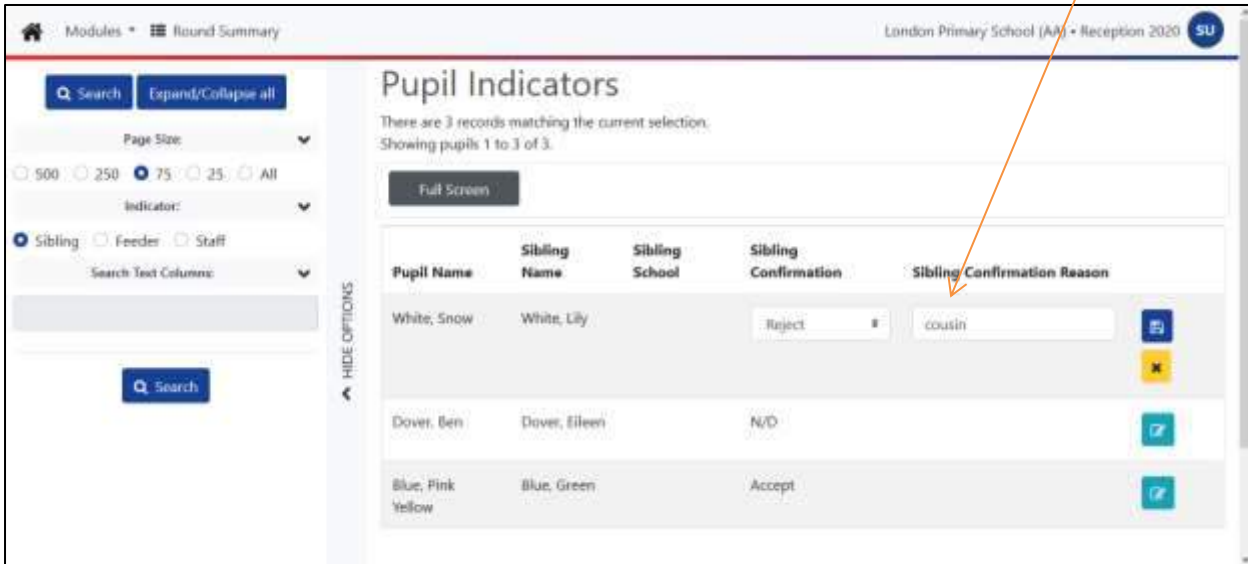


In the 'Sibling confirmation' click in drop down menu to change the N/D (no decision) to either 'Accept' or 'Reject' the claim. If accepting the claim, select 'Accept' then click on 'Save'. The child will then be removed from the list.



IMPORTANT INFORMATION: If you come across applications where parents should have applied under the sibling criterion but they have forgotten to tick the sibling box or name the sibling on their application, please email school.admissions@croymdon.gov.uk and provide the full name and dob of the sibling so they can be added to the application. Failure to do so will result in the application not being considered under the sibling criterion.

If rejecting, please type in the reason in the 'Sibling confirmation reason' box, e.g. cousin, sibling at different address etc. then click 'Save'. **NB** Siblings are what you consider as 'siblings' in your admission criteria, so this may include sixth form or other year groups in the case of an all-through school.

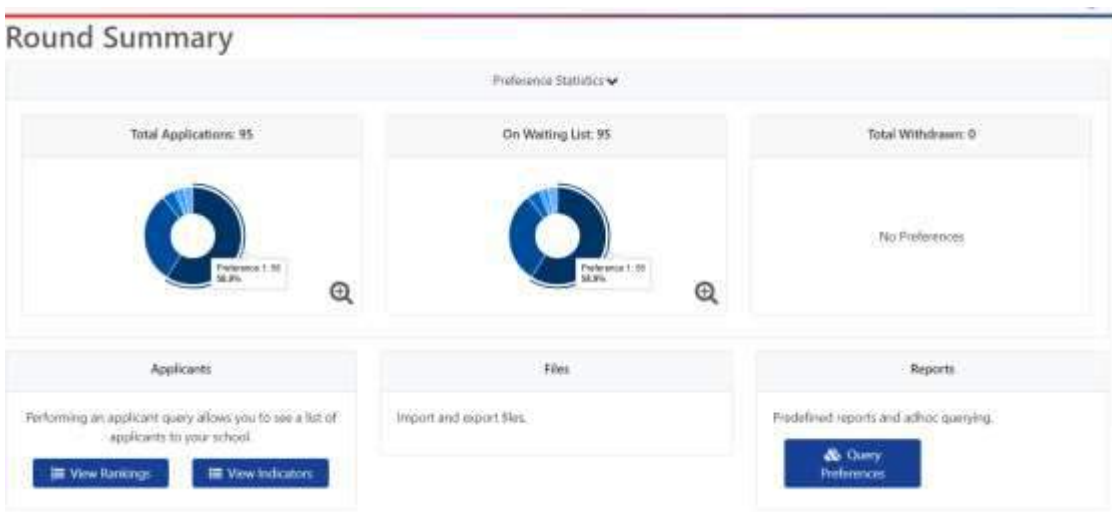


Identifying applications requesting medical or social consideration (for schools that have a medical/social admissions criterion)

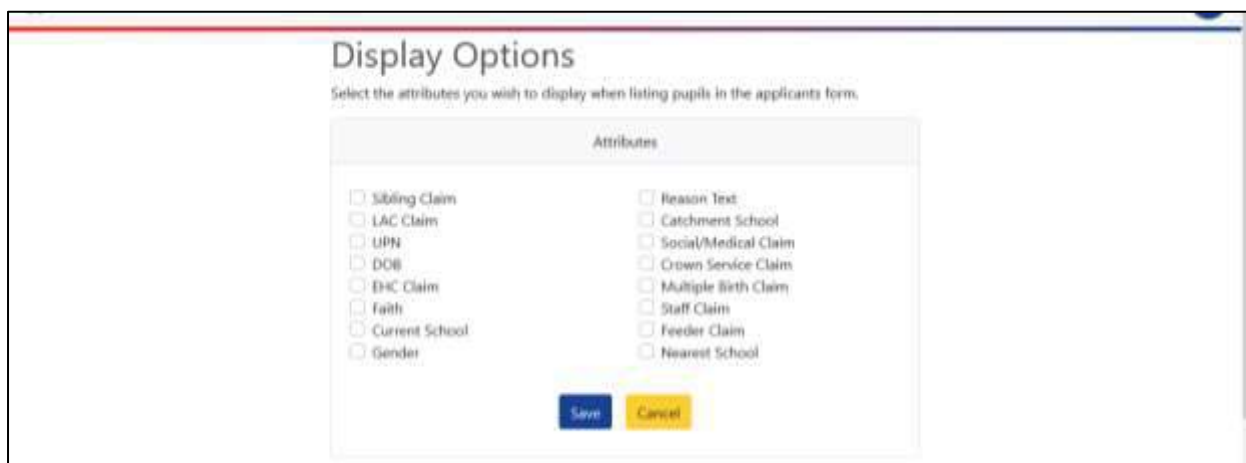
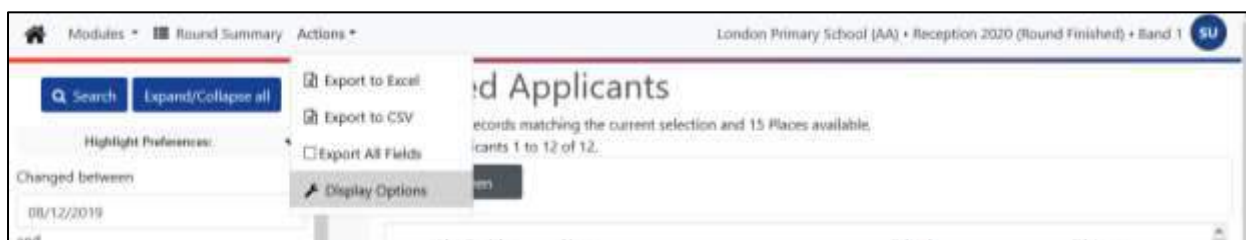
Please note that your medical/social application process should be published on your school’s website and should match your admissions arrangements. All medical or social requests for on time applications must be processed before you start to rank.

Identifying applications where medical/social consideration is being requested (please also refer to the “Information sheet for OAA schools – How to process Medicals” sent by email to all OAA schools.

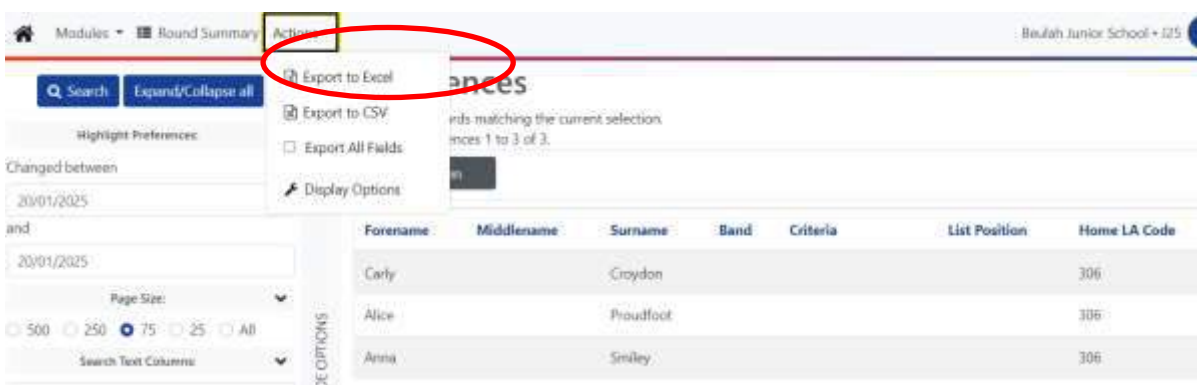
Log in to SAM in the usual way and once in the Round Summary click on Query Preferences:



This will show a list of applications. Then click on Actions and select Display Options



Select social\medical claim. Then go back to Actions and select Export to Excel:



You will then have to open the excel spreadsheet that has been created and save this somewhere.

The spreadsheet has many columns, and you should scroll across to identify the medical column and highlight this column. You can filter the column to show only those applications where it shows yes to medical. You must process all the requests for medical consideration showing on the spreadsheet. You should run this report regularly to capture any new on time applications.

If the School Admissions Team receive supporting medical evidence and the applicant has advised that they are requesting “medical or social consideration” for your school, the evidence will be sent to you by Document Exchange on PAN London. **If we have not sent anything it is the school’s responsibility to contact the applicant directly for supporting evidence.**

It is for the school to decide who will make the decisions on whether a request for medical (or social if this is part of your admission criteria) consideration will be upheld or not. If upheld, you must advise the school admissions team of this before you start to rank. Upheld medicals must be reflected in your ranking.

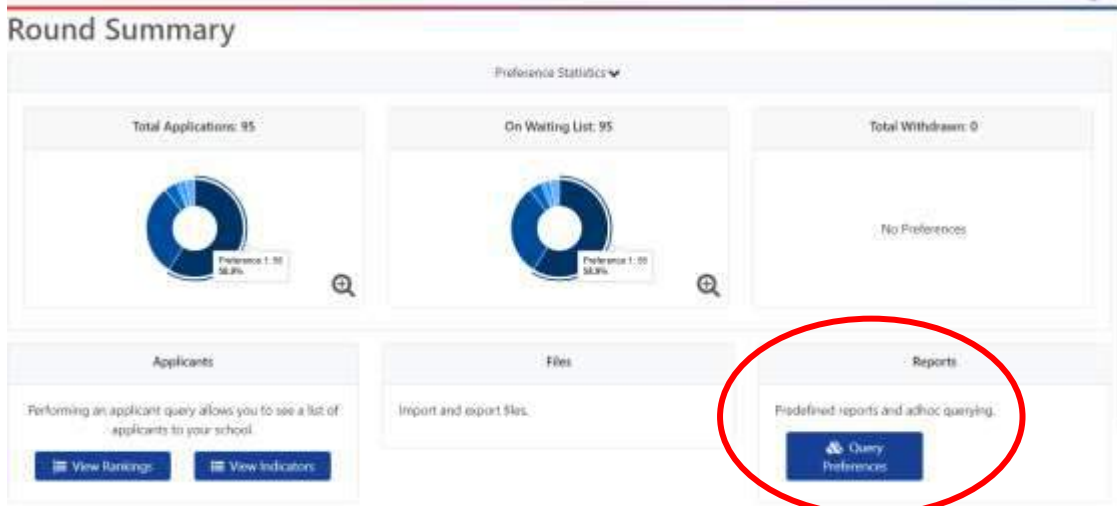
For Junior Schools ONLY

Checking Feeder Claims

It is the junior school's responsibility to verify the Feeder School status on Junior applications. This will involve contacting the feeder infant school for confirmation the child is still in attendance in year two.

To identify the children who are at the feeder infant school:

Log in to SAM the usual way and once in the Round Summary click on Query Preferences:



This will show a list of

applications. Then click on Actions and select Export All Fields:



Then go back to Actions and select Export to Excel:



You will then have to open the excel spreadsheet that has been created and save this somewhere.

The spreadsheet has many columns, and you should scroll across to identify the current school and highlight this column.

BC	BD	BE	RF	BQ	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BG	BT
1	Sibling Co-Sitting Po	Current Sc	Current School	LAC Claim	LAC Claim	Care Auth	Special Et	Special Et	Crown Ser	Crown Ser	Multiple Et	Multiple Et	Applicant	Applicant	Applicant	Applicant	Applicant
2		Croydon	Atwood Primary School	No	No Decisi	-unknown	No	No Decisi	No	No Decisi	No	No Decisi	Mrs	Eliane	O'Brien		
3		Croydon	Beulah Infants School	No	No Decisi	-unknown	No	No Decisi	No	No Decisi	No	No Decisi	Mrs	Pauline	Panton	B BERNIA	ELE
4		Croydon	Beulah Infants School	No	No Decisi	-unknown	No	No Decisi	No	No Decisi	No	No Decisi	Mrs	Jill	Smiley	B Bernard	Bas

I would advise that you use the filters to identify the different current schools. You are only looking for those that have your corresponding infant school as their current school. Any applications that have a different current school to this will not show on your feeder list so no need to take any action.

Create a second tab on the spreadsheet to copy the filtered list into and use this list to send to the Infant school and ask them to confirm that these children are still on roll in the year two class. You can delete unnecessary columns so you only provide the children’s names, date of birth and current school. It’s helpful if you freeze the top line as your list will be a lot longer. Create a column for the infant school to indicate if the child is still on roll. Please send this list either by document exchange or secure email. **Give a deadline by which the spreadsheet must be returned to you. I would suggest 13th February so that you have the information and can update the personal indicators before you start to rank.**

Your list should then look like this:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
AppRef	Surname	Forename	Middlename	DOB	Gender	BS7666 P	BS7666 S	BS7666 S	Address	Address	Town	Postcode	Current School	At Feeder School	Yes/No
306-2025-09-E-000051	Proudfoot	Alice		02/09/2011	F	8 Bernard	Eleventh A	Mint Walk	Eleventh A	8 Mint Walk	Croydon	CR0 1EA	Beulah Infants School		
306-2025-09-K-017250	Smiley	Anna		15/04/2011	F	8 Bernard	Basement	Mint Walk	Basement	8 Mint Walk	Croydon	CR0 1EA	Beulah Infants School		

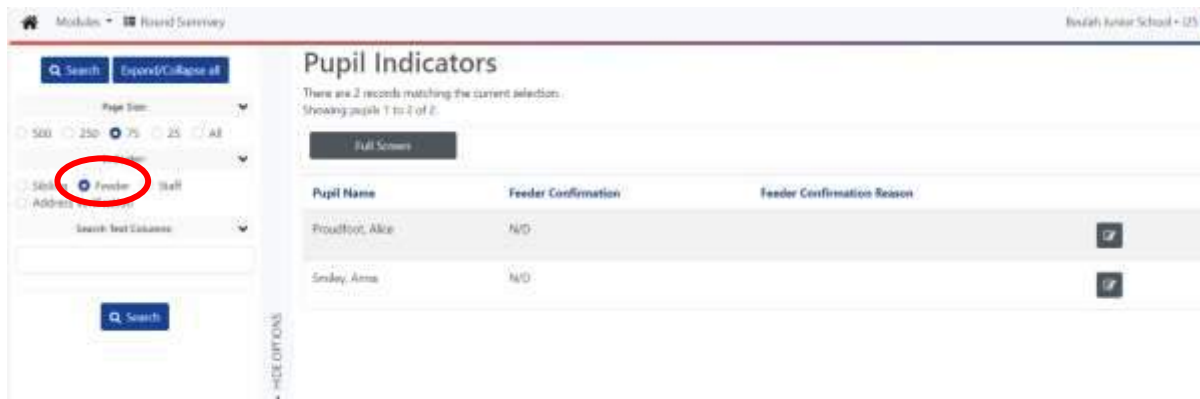
Once you receive the spreadsheet list back you will need to go back into SAM and verify the feeder schools

To verify the feeder status on SAM

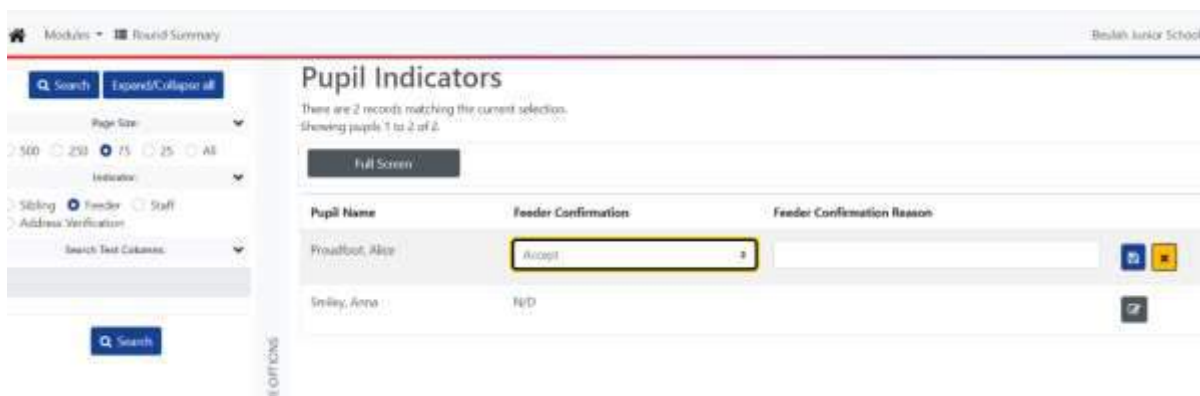
Click on the ‘View Indicators’ button at the bottom of the ‘Round Summary’ page.



Choose 'Feeder' then click on 'Search' for the details of children who are at the feeder school to appear.



Then click on the 'Edit' button next to the child. In the 'Feeder confirmation' click in drop down menu to change the N/D (no decision) to either 'Accept' or 'Reject' the claim. If accepting the claim, select 'Accept' then click on 'Save'.



If rejecting, please type in the reason in the 'Feeder confirmation reason' box, e.g. no longer at the feeder school etc. then click 'Save'.

To rank the applications please refer to relevant section of the SAM user guide.

Rankings

Selecting bands and assigning criteria

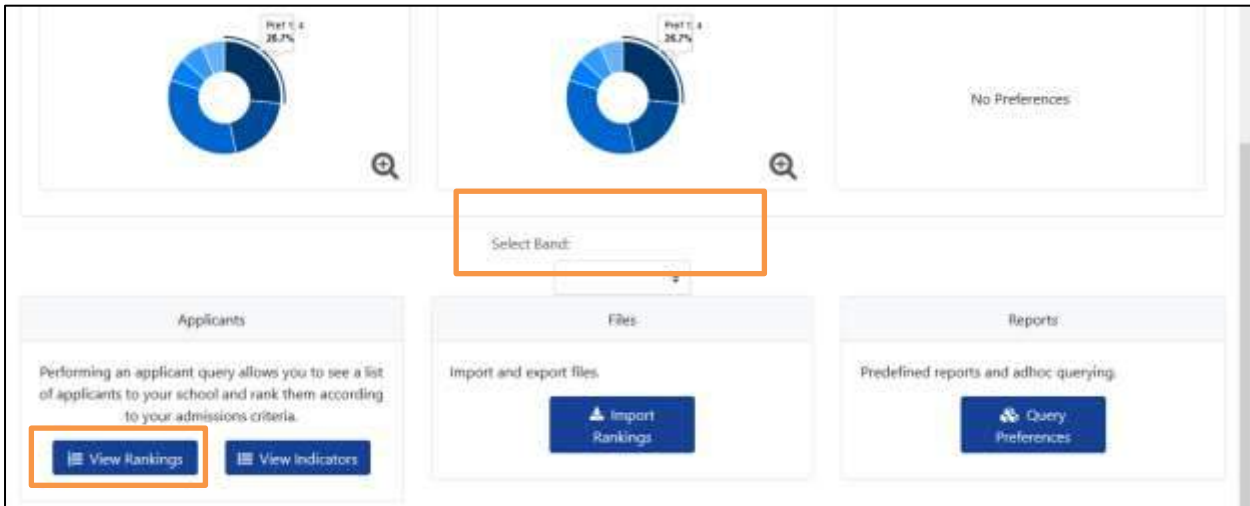
Firstly, you have to give each applicant a criterion using the criteria that has been set up in Synergy. You then have to order these criteria before generating a list of applicants in readiness for the allocation process.

Schools that use banding as well as criteria will need to select the band that they are going to rank before moving to the section 'View Rankings'.

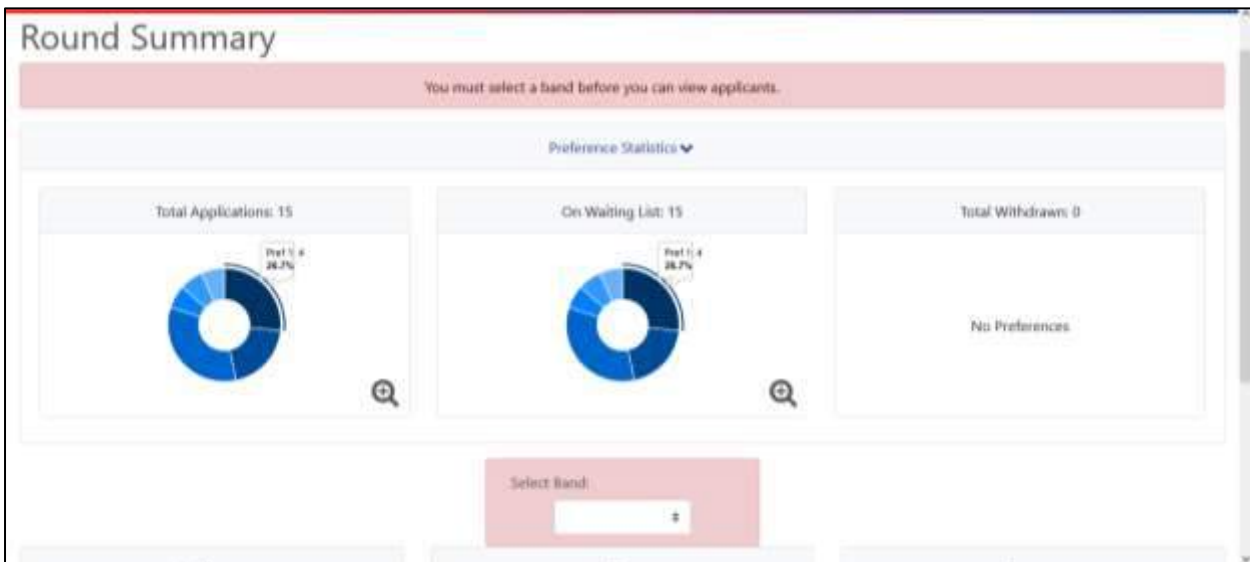
Schools with banding will have to repeat the same process for each band that has been set up.

The 'Round Summary' page will display an extra box entitled 'Select Band'. Choose a band from the drop-down selection, the band names will be bespoke to the school's admission policy. Then, to rank applicants based on your

criteria, click on the 'View Rankings' button.



For schools that have banding: If you do not select a band before you start ranking you will get the following error message.



The following screen will be displayed. This will produce a list of all applicants who have requested your school and that are unranked, in alphabetical order of surname.

The screenshot shows the 'Unranked Applicants' page. Callout boxes provide the following information:

- * Expands or collapses these display (pointing to the 'Expand/Collapse all' button)
- Defines number of applications on the page (pointing to the 'Page Size' dropdown)
- Default criteria box defines criteria for multiple entries (pointing to the 'Default Criteria' dropdown)
- Selected band (if bands are used) (pointing to the 'Assign Selected' button)
- Display Unranked/Ranked (pointing to the 'Unranked' radio button)
- Filters (pointing to the 'Filters' section)
- Criteria box for inputting individually (pointing to the 'Criteria' input field in the table)

List Position	Select	Name	Criteria	Distance
	<input type="checkbox"/>	Broadway, James		3,299
	<input type="checkbox"/>	Friday, Monday		3,296
	<input type="checkbox"/>	Number Three, Child		3,321

Bottom of the page

The screenshot shows the bottom of the page with the 'Order by' dropdown menu open. The menu options are:

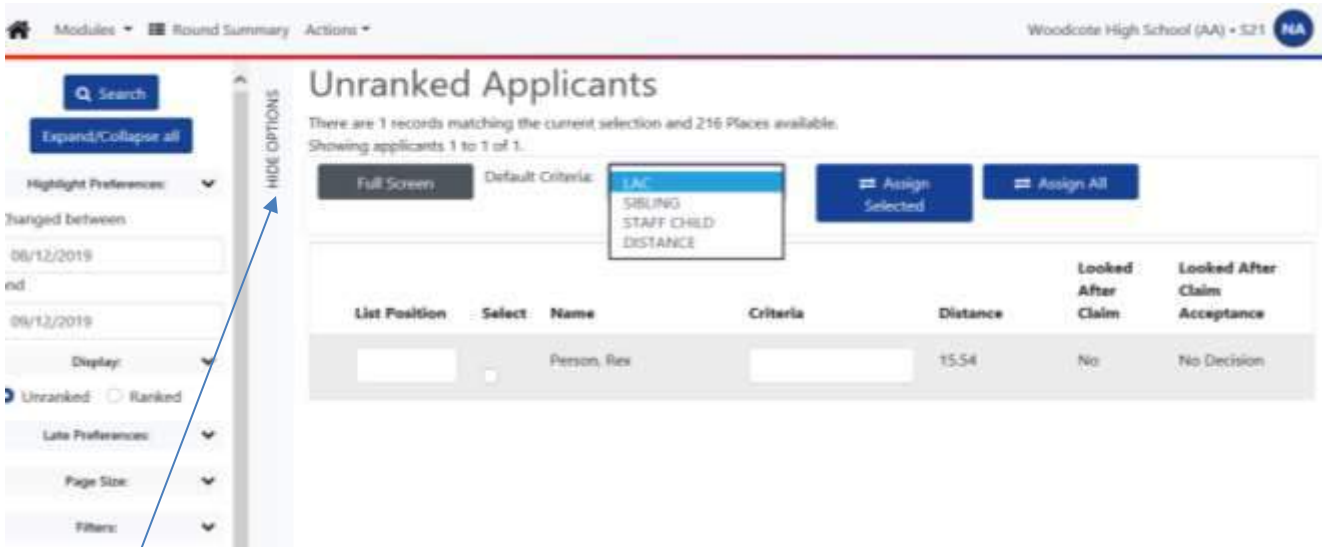
- List Position
- Name
- Criteria
- Distance
- DOB

The 'Search' button is also visible at the bottom of the panel.

Once a filter is chosen, click on the 'Search' button either at the top or bottom of the panel for the filter to activate.

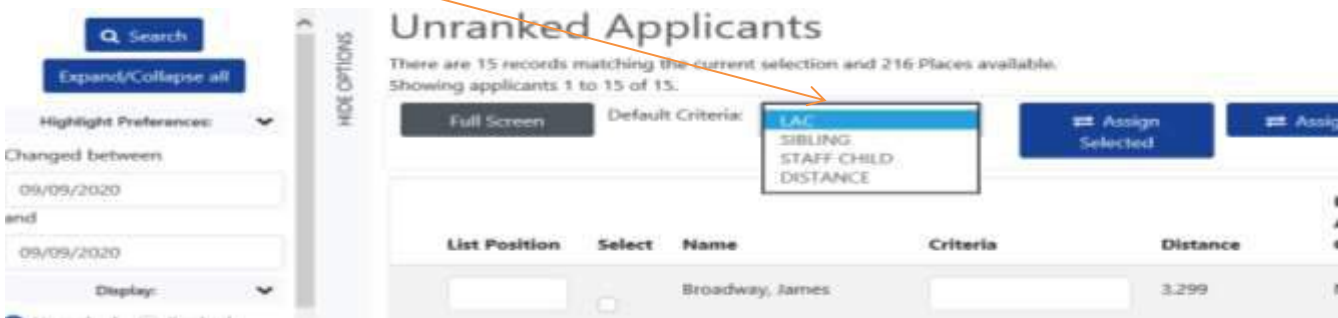
Late applications are not included before National Offer Day but afterwards the button for this must be ticked as late applications have to be considered, ranked and ordered in a waiting list in line with the school's admissions criteria (and banding where used).

When the 'collapse all' button is clicked:



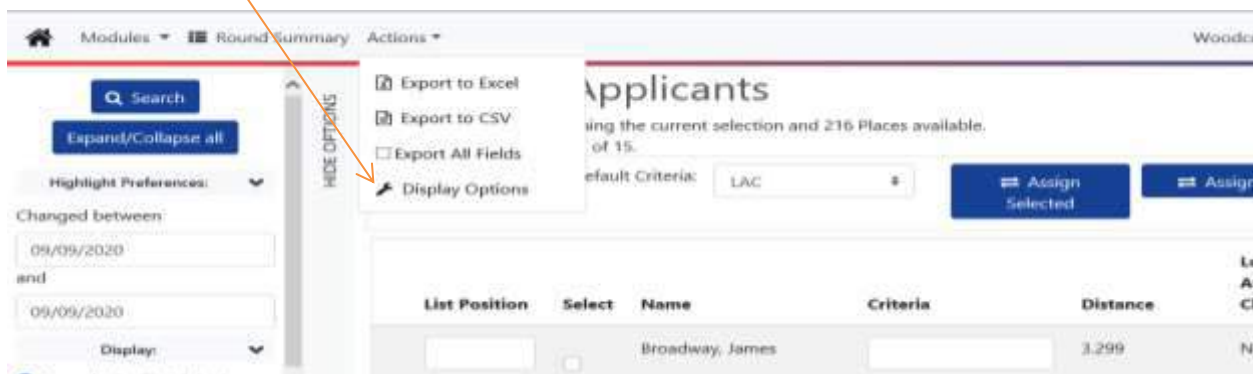
The '< Hide Options' panel can be clicked to hide it. If it is needed again, click on the '> Show Options' button.

The 'Default Criteria' and 'Criteria' drop-down lists are bespoke to each school according to the school's published admission criteria.

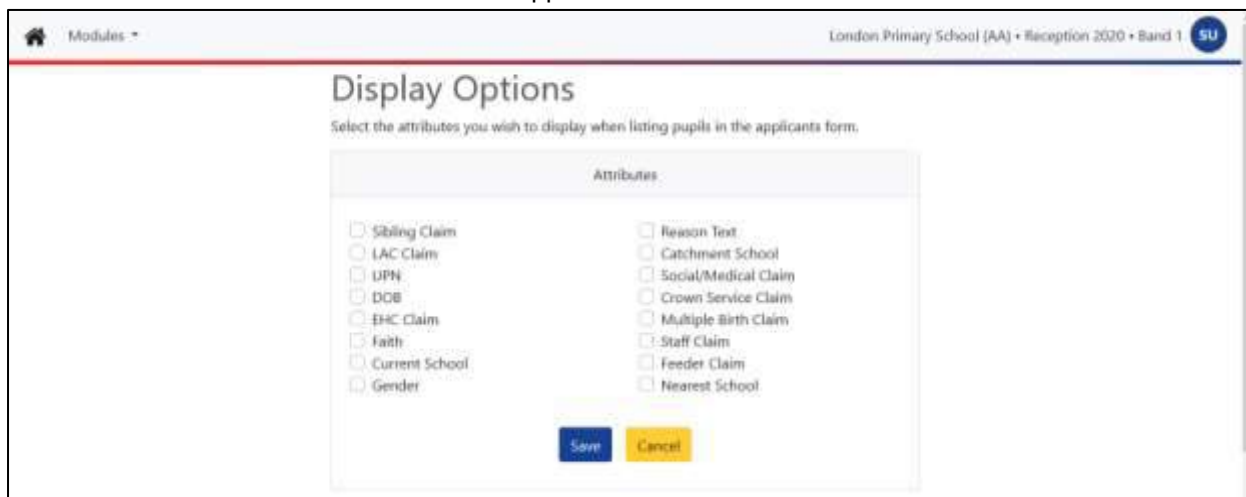


If any changes to the criteria or its order are required please contact Croydon School Admissions Team for this to be changed. The 'Default Criteria' will be in criteria order, so LAC will show as default because it is in most cases the highest priority.

To view more fields displayed in the screen in relation to the children's details, click on the 'Actions' button and then the 'Display Options'



Then the following screen will be displayed with options to choose from; click on 'Save' and the screen will return to the list of children with the fields included if applicable.



Assigning criterion to child's application

There are two ways to rank children in SAM

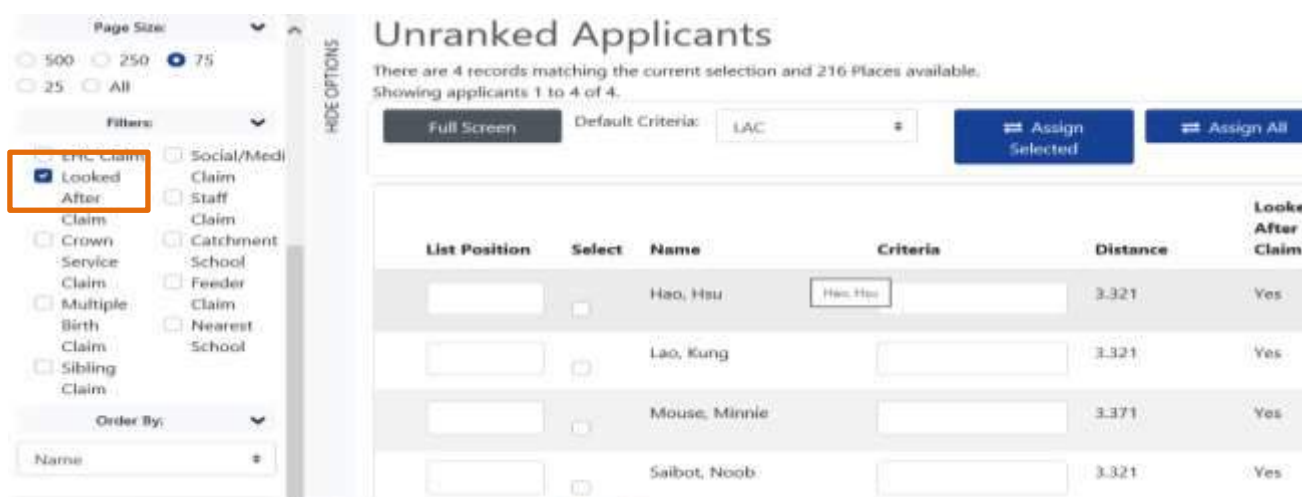
Where a school has banding, children would normally only be linked to one band. When starting the process of rankings, all children will appear in all bands until they are assigned a criteria which links them to a band and so will no longer appear in any other bands. Where bands are used, start with a band and work through band by band by assigning the criteria to each child to save them in their band.

Using filters

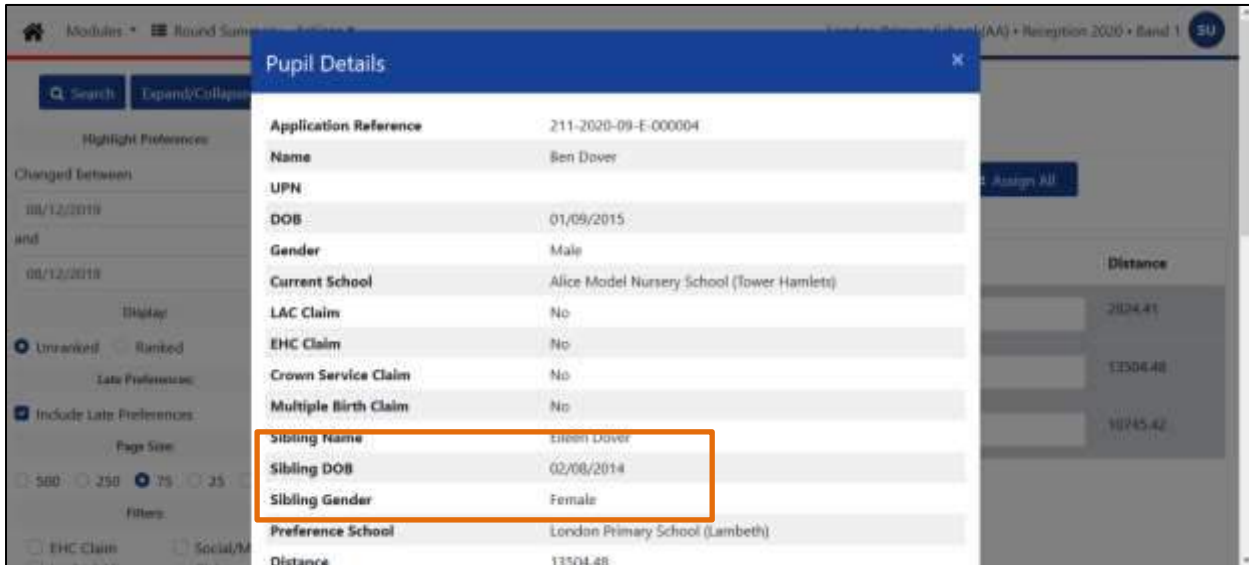
The filters can be used then confirmed by checking the child's details. Click on the child's name to see the details for checking. If there is a sibling claim this will appear in the details. **It is the school staff's responsibility to ensure sibling and children of staff claims are checked** if they form part of the school's admissions criteria. **Croydon School Admissions Team will verify Looked After/previously Looked After claims and send over documentation to confirm this via document exchange.**

Children with EHC Claims do not go through the co-ordinated admissions process and although this filter is available it should not display any children in the search.

Choose the correct relevant filter to show the children with the relevant claim, then 'Search' (at the bottom of the page). This will show all the children applying for the school even if you do not wish them to be assigned to this particular criterion. This list will reduce as children are assigned criteria and so are linked to a specific criterion e.g. Looked After Claim:

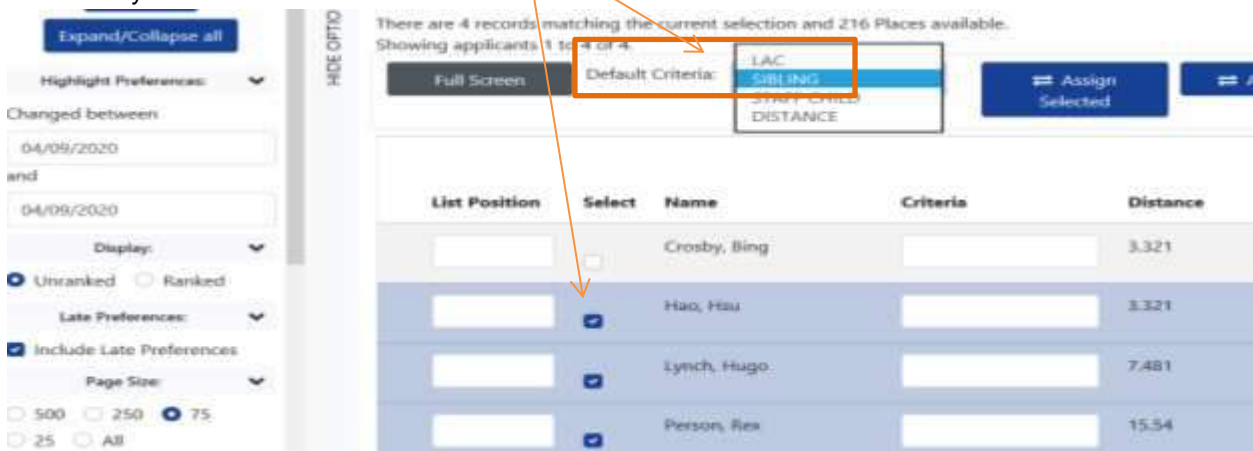


For the sibling claims, click on the child's name to see all the details for the application so the claim can be considered fully, assessing the sibling details, applicant's details and address.



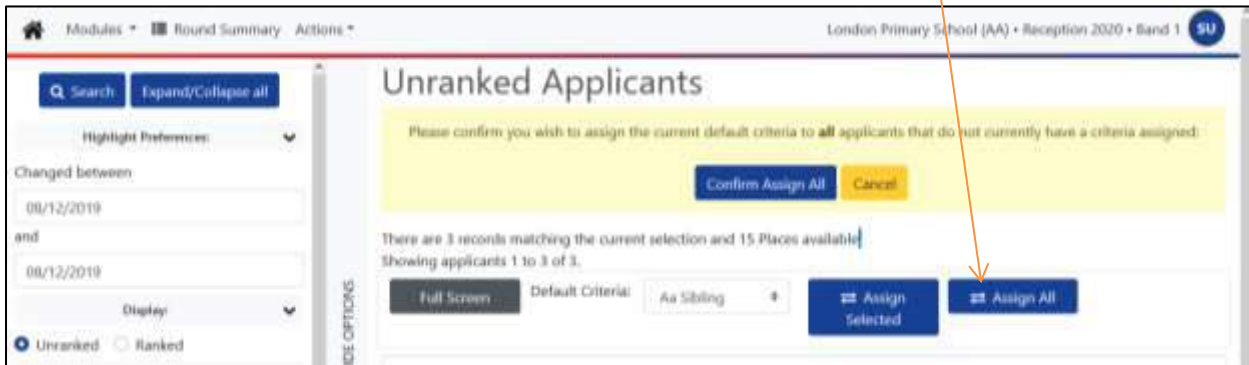
NB At present Croydon School Admissions Team do not attach documentation to an application, so if you scroll down to see if documents are attached to the application, there will be no items to view. If this changes schools will be informed. Supporting documentation will be sent to the school either via LGFL document exchange or Egress secure email.

Then click on the relevant 'Default Criteria' and choose the required criterion. If only some of the children showing are to be assigned the criterion click on the 'Select' button for each of the relevant children. The line will change to a slightly different shade of blue. **NB** where bands are used this will assign the criteria and the band already chosen so ensure only the children in that band for the criteria are selected.

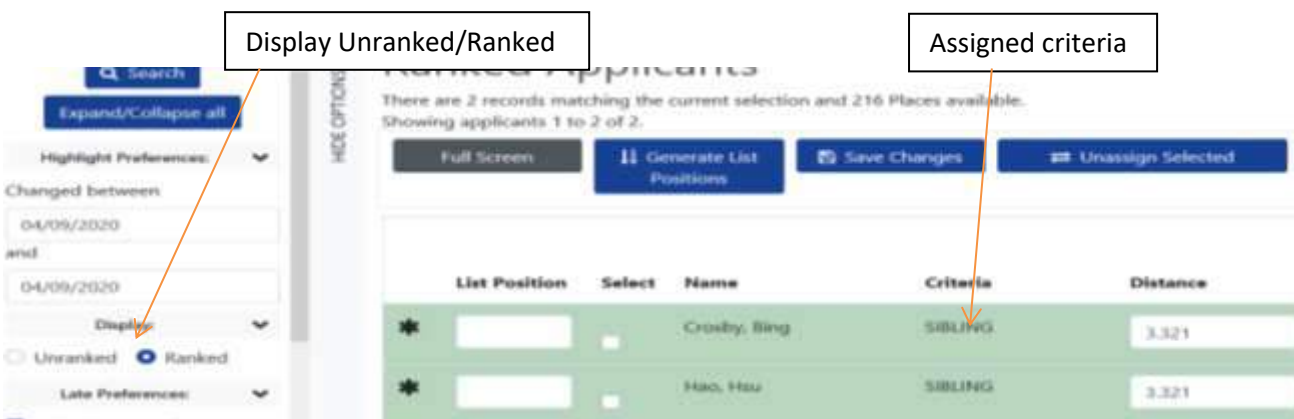


Then click on the 'Assign Selected' button to save the criteria.

If all the children showing are to be assigned the same criteria, the 'Assign All' button can be used. Then following message will show to confirm or cancel as necessary.



Once the selection is confirmed the children will have their criteria assigned and, if using bands, the band they are in. The lines will change to blue. You will also notice that these children are now in the 'Ranked' section. To continue assigning criterion to other children, the radio button needs to be switched back to 'Unranked'.



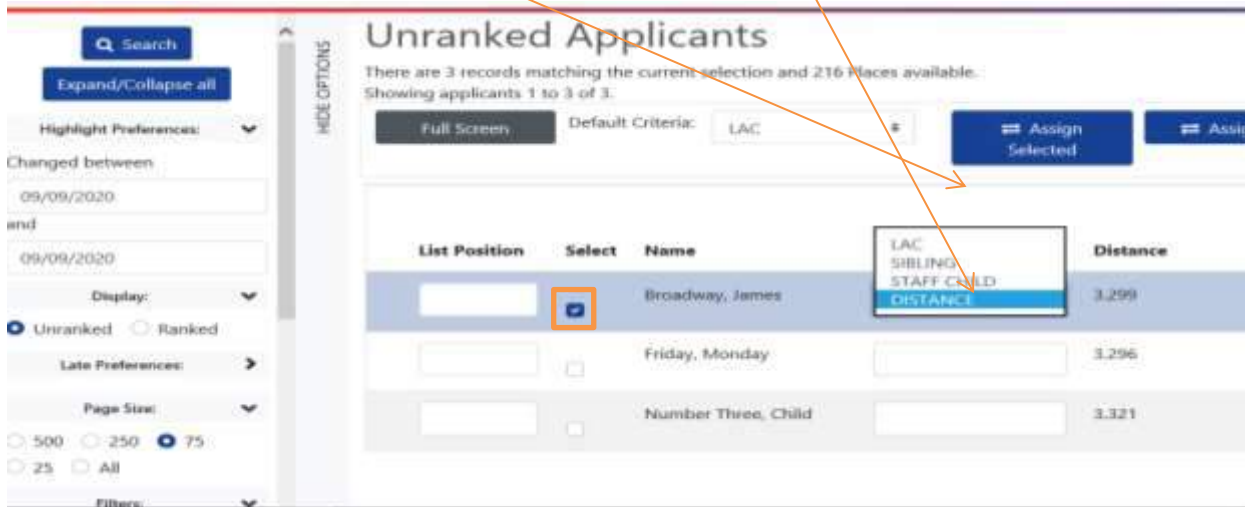
NB when moving from one filter to another or to none, ensure that the previous one is no longer ticked.

The same method as above can be used when not using filters to assign criterion to a selection of children. The yellow bar just refers to the children who have just had their criterion assigned.

Individually assigning criteria

From the 'Unranked' list ensure that the filters are not being used so none are ticked otherwise the number of children viewed will be less than those to be looked at. For individual selections click in the criteria box and choose the criterion required from the drop-down box, the 'Select' button will automatically be ticked. Then click on the 'Assign Selected' button to save the changes. This can be quite time consuming, so you may wish to select children for a set criteria as listed above. The children could be ordered by 'surname' from the drop-down list for ordering if this helps.

Click on the 'Select' button on the child's line then 'Criteria' box for same selection of criteria to appear. This list is the same as the 'Default Criteria' box and is bespoke to the school. Click on the criterion to be chosen. Then click on 'Assign Selected'. If a selection is not made from the criteria box on the child's line, the default will be assigned for the child. Several children can be given different criteria each before clicking on the 'Assign Selected' to save.



To check what has been undertaken so far, click on the 'Ranked' button to view which children have been given what criterion. The children will show up in criteria order, then distance order (if distances are calculated).



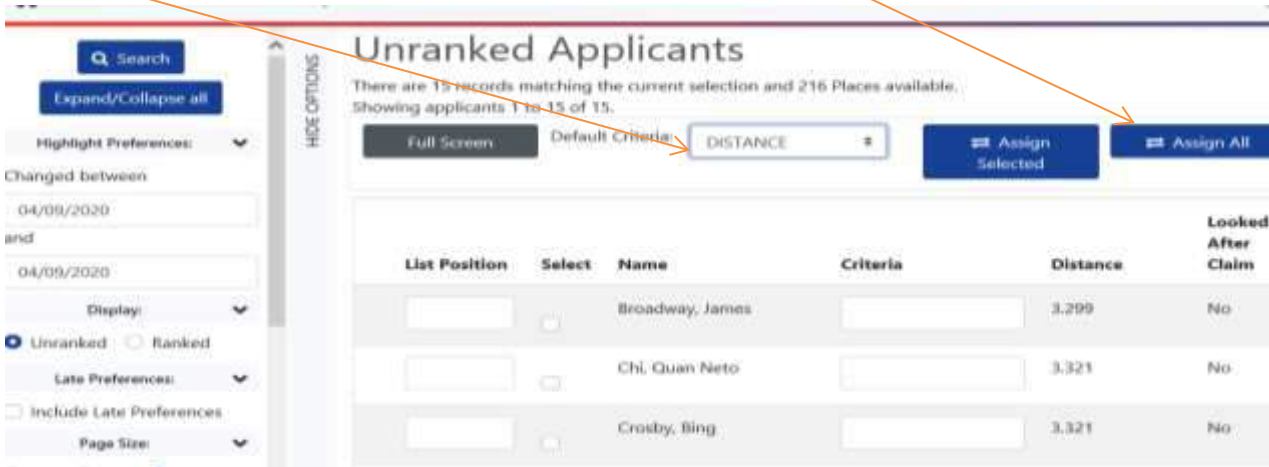
To ensure that criteria are saving as you go through, occasionally go to the 'Ranked' list and click on 'Save Changes'.



Then return to 'Unranked' to continue. Otherwise, the programme will not realise that work is being undertaken and will time out with nothing saved. Ensure that the filters are not ticked to see all applicants left in the 'Unranked' list.

Assigning all children the same criterion

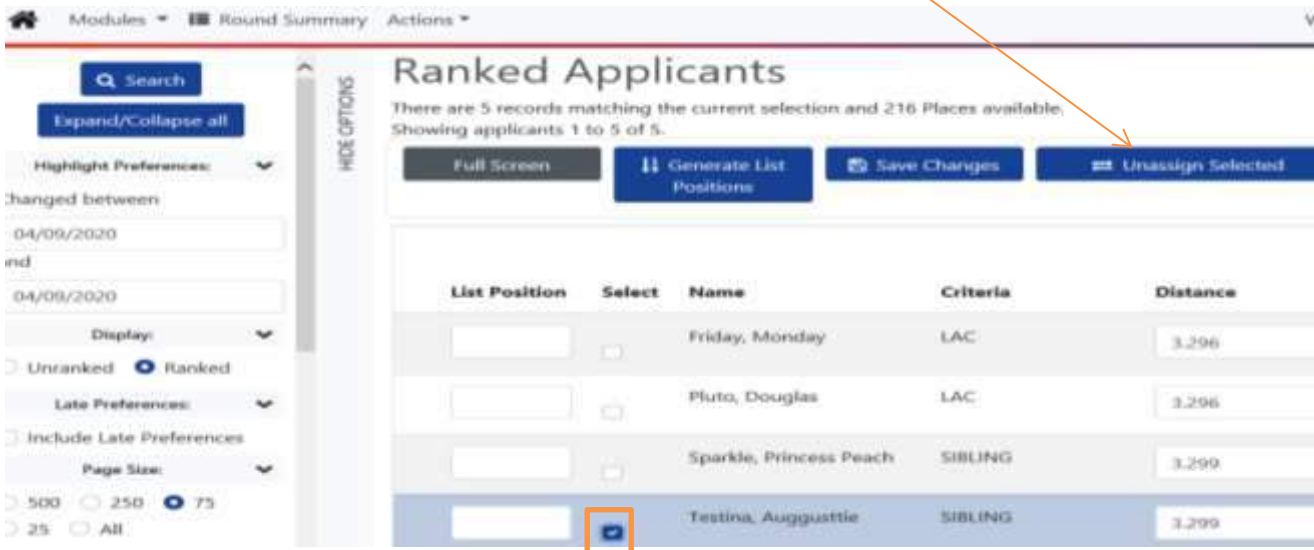
If in the last band or where no bands are used and all the top criteria have been assigned, so the last criteria is required for all the remaining children, the 'Assign All' button can be chosen once the 'Default Criteria' has also been chosen.



Dealing with banding or criteria mistakes

If a child is assigned the wrong band or criterion, the child's criterion in that band (if bands are used) can be removed. In the ranked list, select the child whose criterion you wish to change by clicking in the 'Select' box for the child then the 'Unassigned Selected' button.

Do not click on the 'Unassign All' button as this will undo all the rankings, unless that is necessary or a filter is being used.

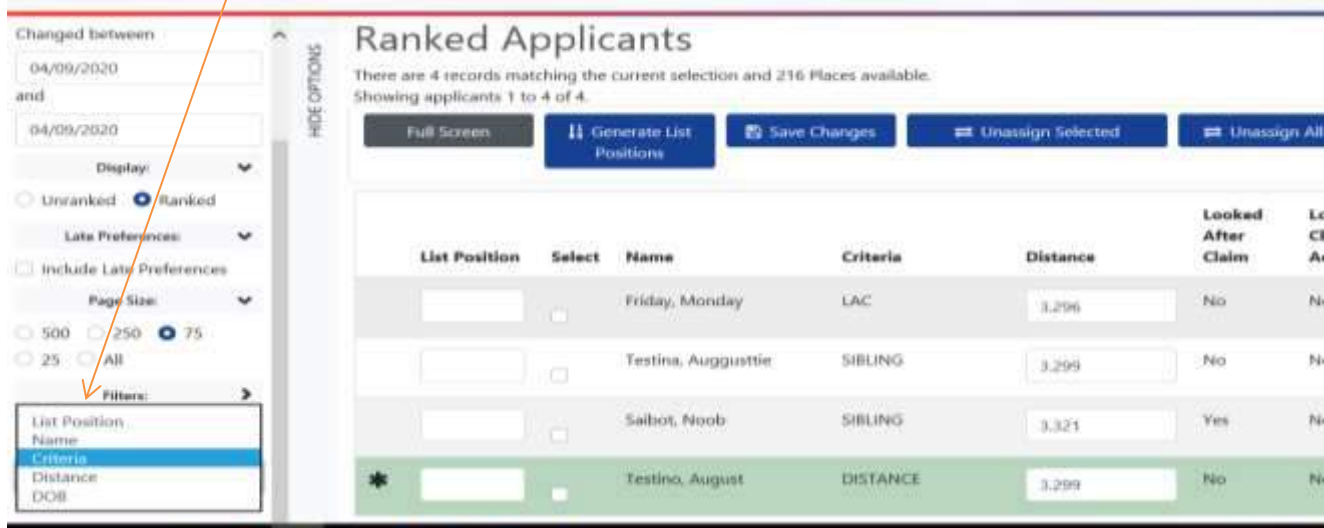


The child will then be taken off the ranked list and moved back in the 'unranked' list for a new band and/or criterion to be assigned.

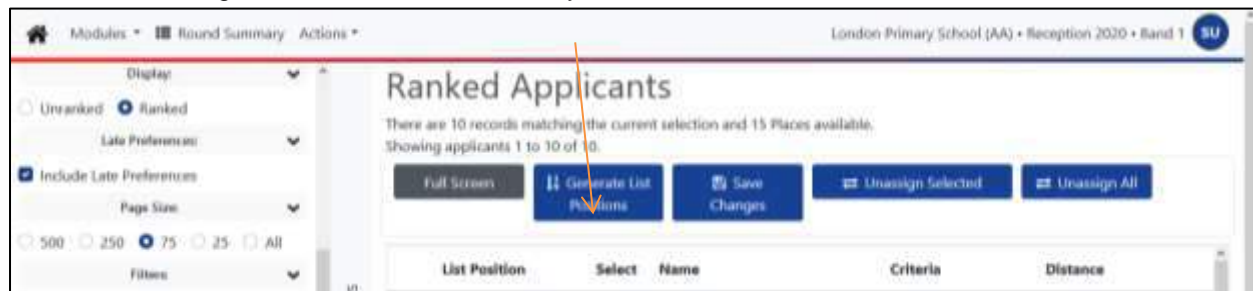
Assigning a list position

Once each child has a band (where used) and a criterion, move on to the next stage to 'generate list positions'. Click on the 'Ranked' button to display the children.

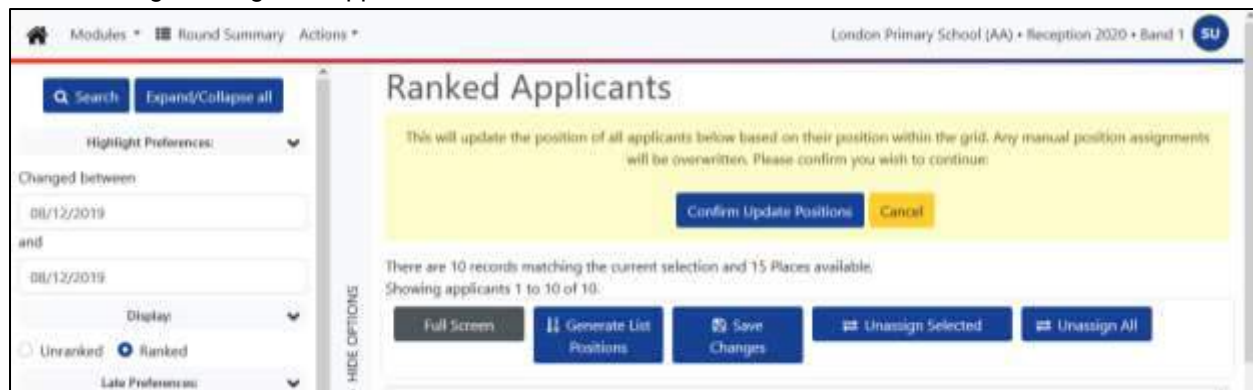
Then click on 'List position' and order by 'Criteria' from the drop down list, then 'Search' for the list to update and appear in criteria order.



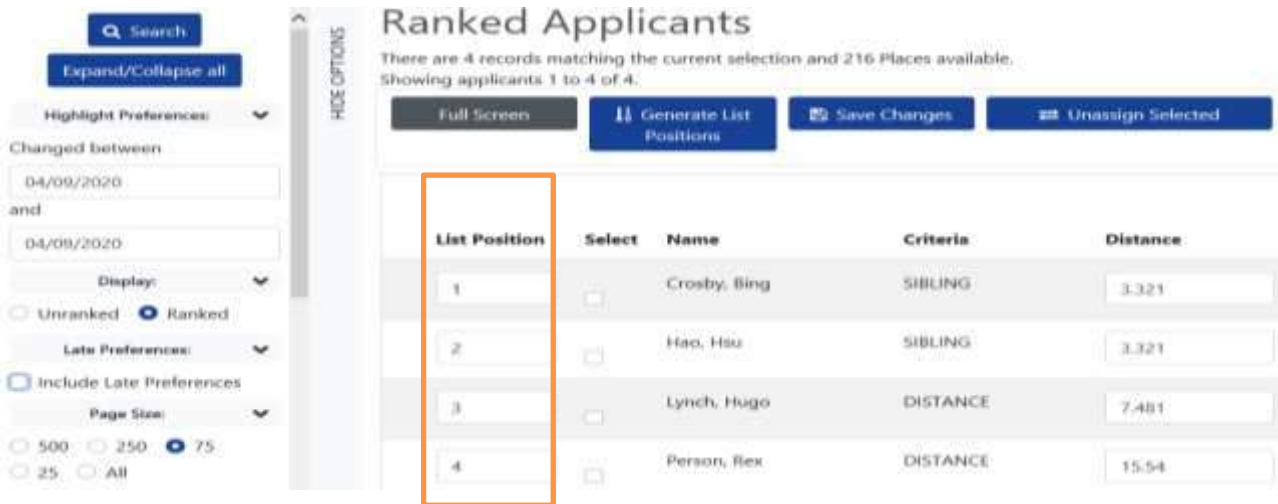
Check the ordering – it should be criteria then by distance. Click on 'Generate List Positions'.



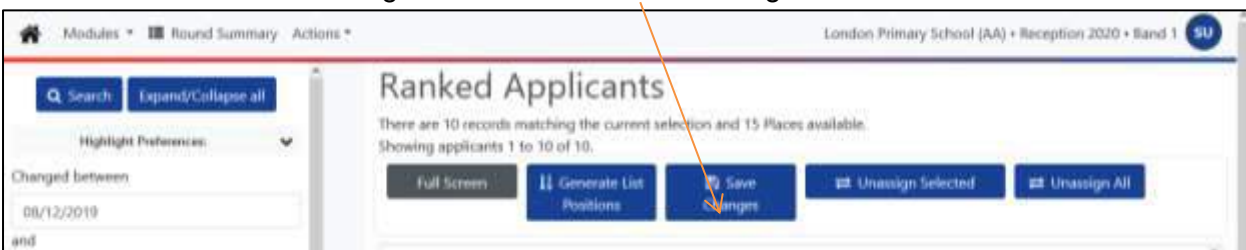
The following message will appear:



If the 'Confirm Update Positions' button is clicked a number will appear against each child



Then click on the 'Save Changes' button to save the rankings.

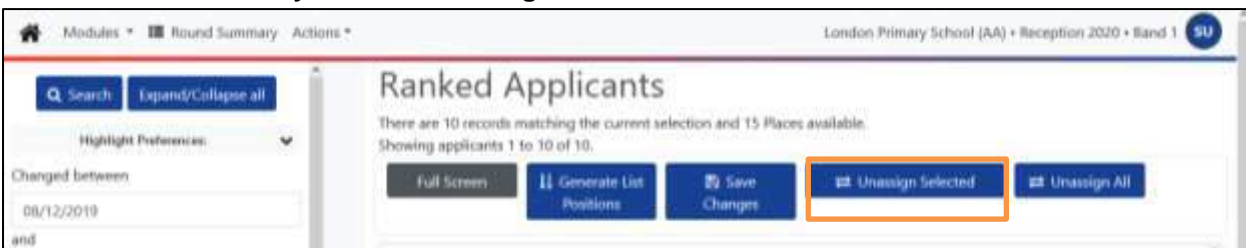


To move on to another band click on the 'Round Summary' button and choose another band from the list as before and continue the processes above for that band. The children available for assigning a band and criteria will decrease as children are assigned these because children can only be assigned one band.

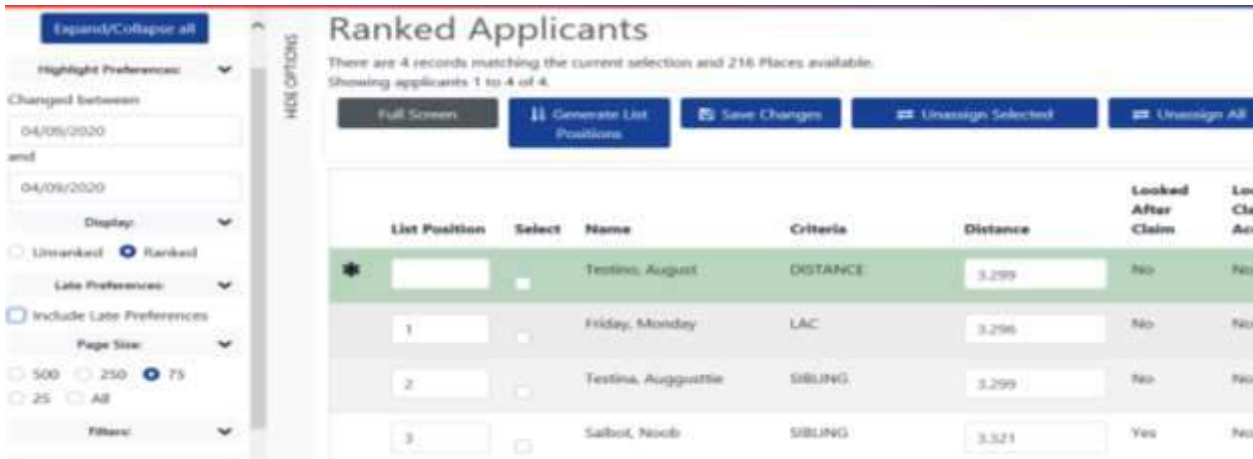


Dealing with ranking mistakes

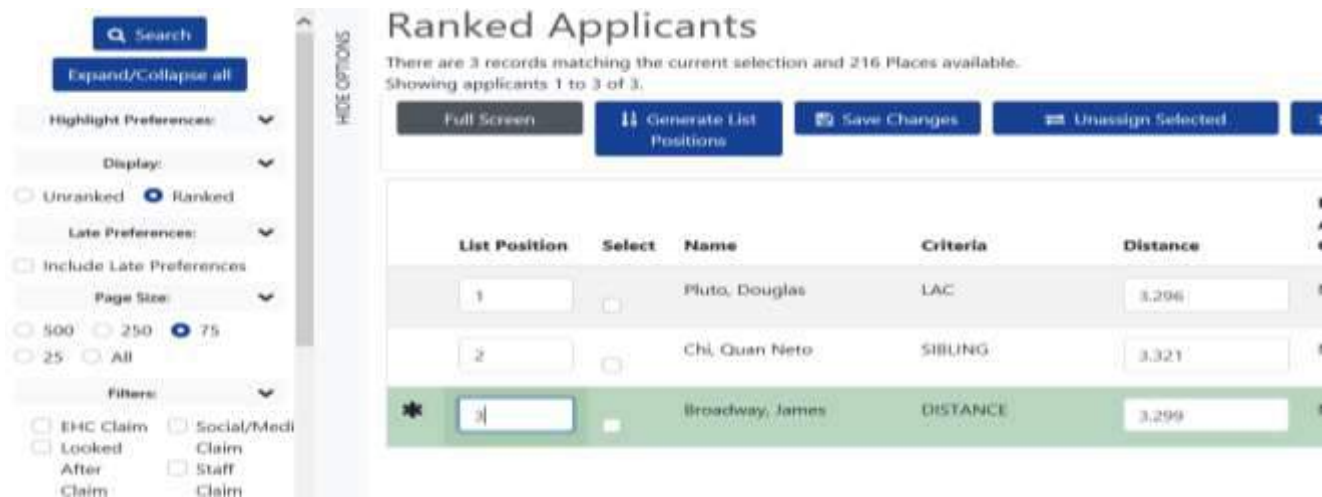
If a mistake has been found, make the change as mentioned before using the 'Unassign Selected' button, change the criteria and/or band and return to the ranked list. The child(ren) whose criterion was changed will show at the top with no list position. **Do not click on the 'Unassign All' button as this will undo all the rankings and criteria work, unless that is necessary or a filter is being used.**



Follow the steps above in the 'Unranked' list to assign the correct criteria. Then click back in to the 'Ranked' list. The child whose criteria and/or band was changed will appear at the top with the asterix.

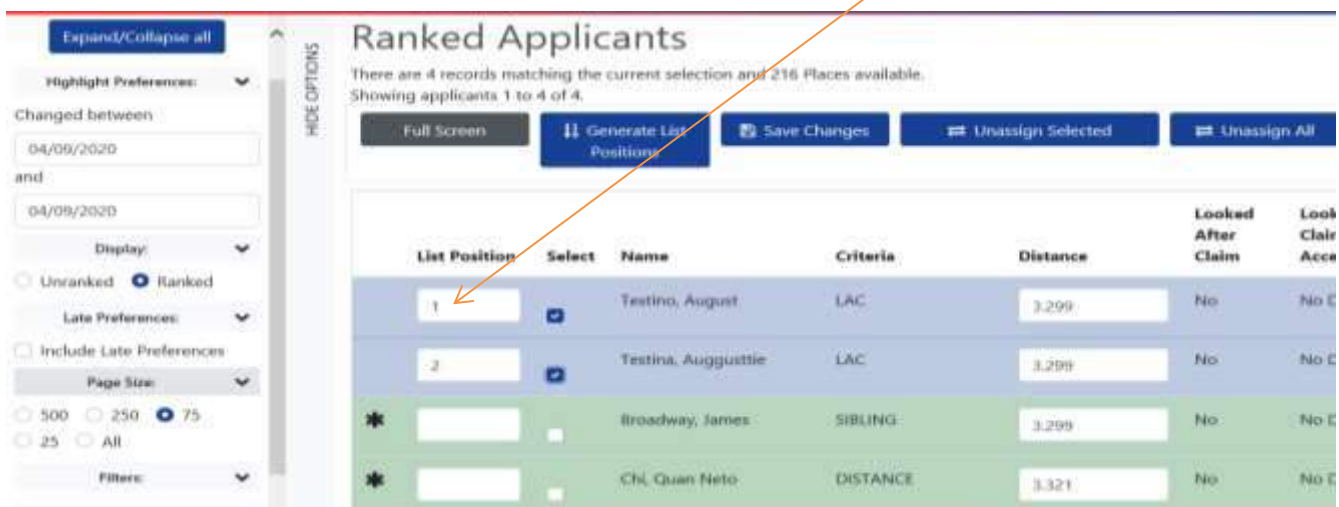


Then order by 'Criteria' again (in the 'List Position' filter), click on 'Generate List Positions' then 'Confirm update positions' and finally 'Save Changes'. **Any changes to rankings can be made up until the designated deadline set by the local authority for on time applications.**

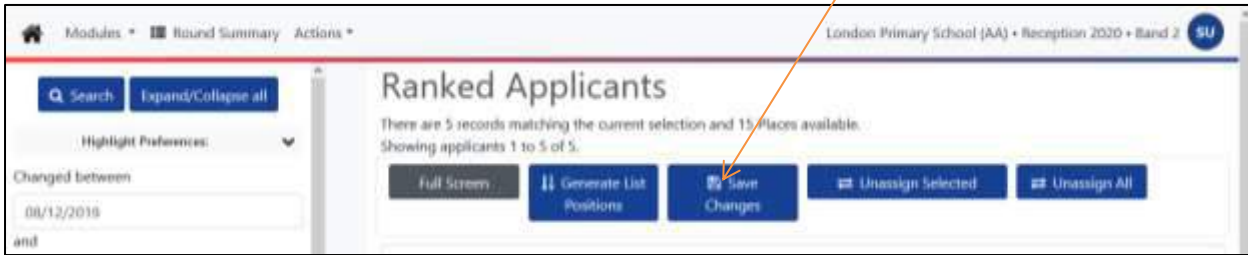


Manual rankings

Ranking list positions can also be entered one by one manually. After the list of children has been ordered in the desired way a rank can be typed in when clicking in the 'List Position' Box for the child.



NB If undertaking this manually over some time ensure that the **‘Save Changes’** button is clicked regularly otherwise the programme will think that nothing is happening and may time out and work lost.



If you make manual amendments and then Click **‘Generate List Positions’** again, the previous warning message will be displayed and confirming the change will result in the manual amendments being overwritten. Any new ranking numbers entered must be saved for them to register by clicking on the **‘Save Changes’** button. **Every child must have a list position.**

Checking

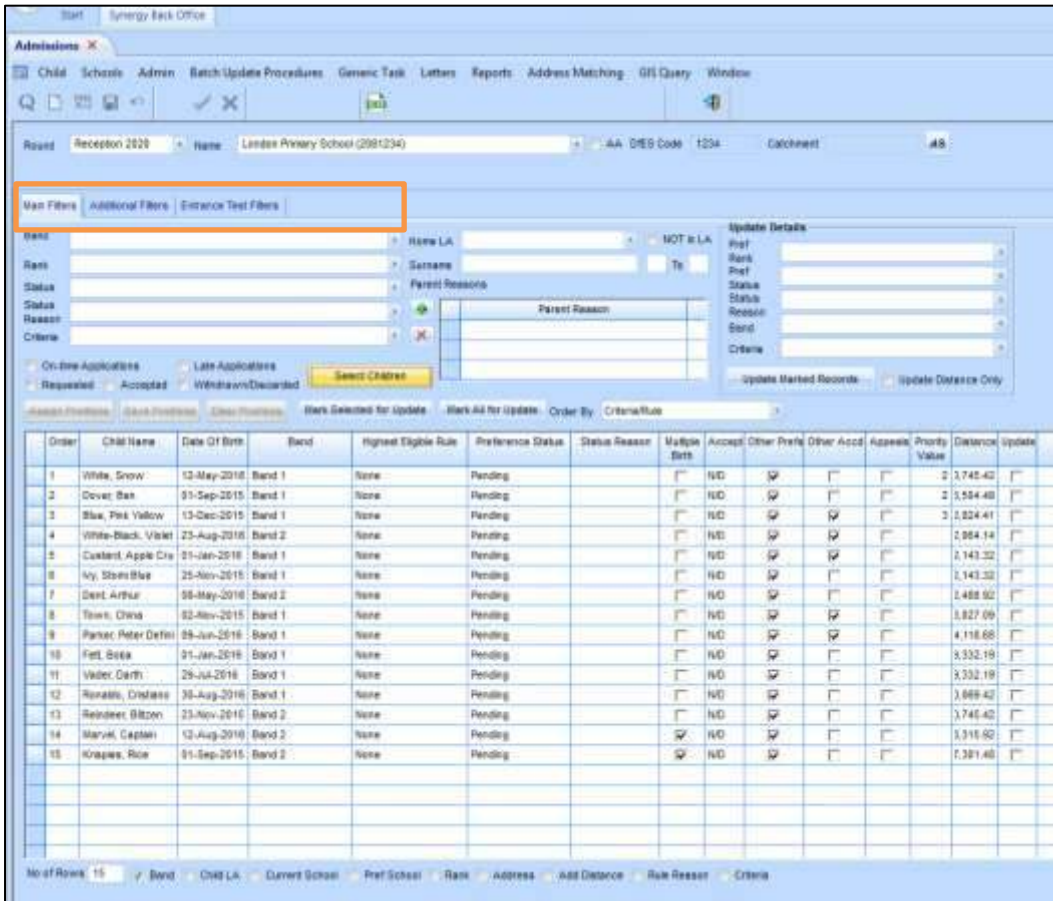
It is strongly advised that once the rankings are finalised that an **Excel spreadsheet** of these are created for **school records** (see below for details about this process). This can be used for sharing with governors, Trust sponsors etc. and used in any appeal hearings.

Croydon School Admissions Team can only see and use the rankings in Synergy once these have been saved. Croydon School Admissions Team will then check the following:

- each child is in a band (where used),
- each child has a criterion
- the list is ordered according to the admissions criteria for the school
- the list is ordered by distance order (where measured) for those with the same criterion
- each child has a rank number
- the ranking numbers are sequential
- LAC/previously LAC children have a criterion assigned reflecting their status.
- Sibling and children of staff claims have been confirmed

If anything is of concern from the above list school staff will be contacted and will be able to amend/re-do any stages as necessary.

Below are examples of a school with banding. If there is no banding the 'band' field will be greyed out.

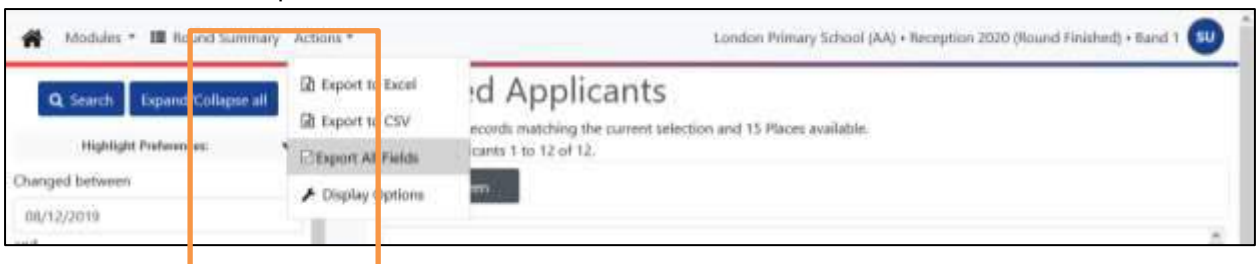


Ranking on a Spreadsheet and Importing

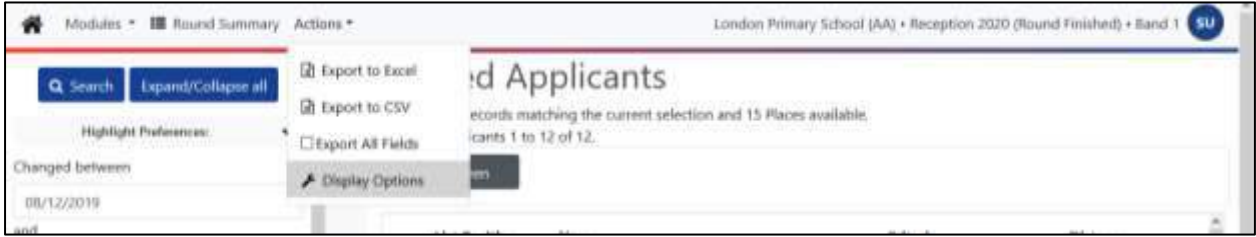
Schools with a very large number of applicants and/or schools which utilise multiple bands will probably find it easier to rank applicants on a spreadsheet and then import them into SAM.

Exporting Data

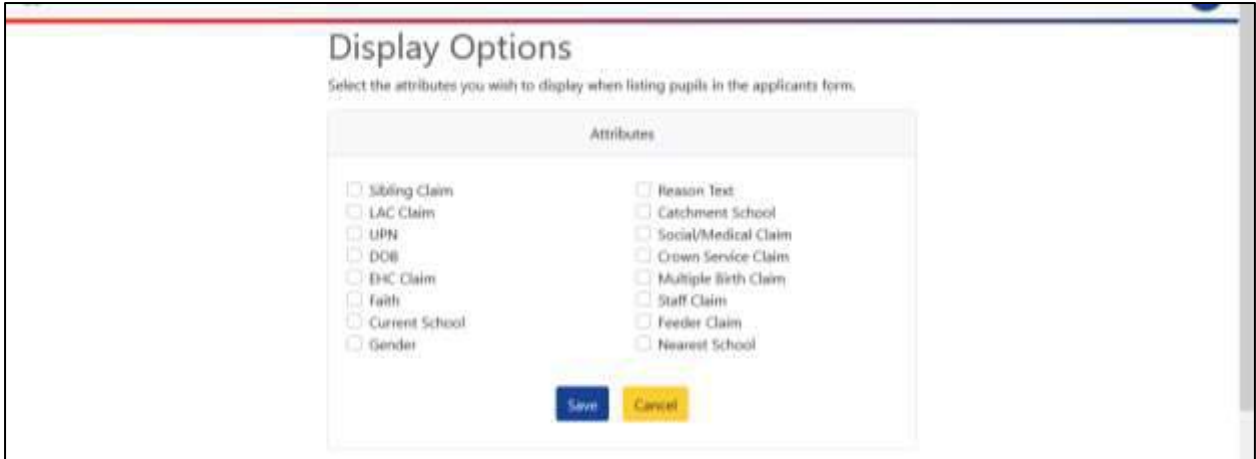
- Applicants' details can be exported to an Excel spreadsheet from any of the 'Applications' 'Files' or some 'Reports' pages at the bottom of the page. **NB** the options will vary depending on the round and stage in the process.
- Whatever screen is showing there is the option to export data to Excel. Click on 'Actions' then either click on 'Export to Excel' which will export just the child's details as listed in the grid below the line, or tick the 'Export All Fields' first, then 'Export to Excel'.



- Using the 'Display Options' the fields shown can be increased.



- The following screen will be displayed with options to choose, click on 'Save' and the screen will return to the list of children with the selected fields included. Finally, click on 'Export to Excel' button.



- Below is an example of details which appear in a full report by surname order.

AppRef	Position	Surname	Forename	Middlename	UPN	DOB	Gender	Pref Scho	School Na	Band	Reason Te	Reason Te	Catchmen	Social/Me	Social/Me	Staff Clair	Staff Clair	Feeder Cl	Feeder Cl	LA Tex	
208-2020-1		Bush	Rose			01/01/201 F		Lambeth	London Pr	Band 1	No	No	No	No	Decis	No	No	Decis	No	No	Decis
315-2020-2		Vader	Darth			29/07/201 M		Lambeth	London Pr	Band 1	No	No	No	No	Decis	No	No	Decis	No	No	Decis
209-2020-3		Ronaldo	Cristiano			30/08/201 M		Lambeth	London Pr	Band 1	No	No	No	No	Decis	No	No	Decis	No	No	Decis
211-2020-4		Case	Justin			02/08/201 M		Lambeth	London Pr	Band 1	No	No	No	No	Decis	No	No	Decis	No	No	Decis

Preparing your applicant data

- If you have a banding exam, or you are recording information received from Supplementary Information Forms (SIFs) it is likely that you will initially maintain a separate spreadsheet of all applicants that completed a SIF/were invited to the banding exam.
- To assist with the ranking process at a later date, it would help if your initial spreadsheet is based on an export from SAM. From the Round Summary screen, select Query Preferences and export a list of all applicants into SAM. **It is very important that the AppRef column is retained** as this is what is used to match to the applicant data in the LA system.
- Do not start ranking applicants immediately after the closing date for applications.
- You should wait until *after* the deadline for 'on-time lates' has passed (refer to annual timetable) and after all applicants have had their home-to-school distance populated in SAM (unless left blank for a valid reason).

Preparing your spreadsheet

- Export a full list of applicants, ensuring you Export All Fields, and save as an Excel spreadsheet in *Excel 97-2003 Workbook format* (it should end in **.xls**). If you save it in the most recent Excel Workbook format (ending **.xlsx**) it will fail import at a later stage.

- You can delete any columns you don't want, except the following columns, which *must* be retained;
 - AppRef** - do *not* edit this column
 - Position** - this is the ranked list position that you assign
 - Band** - this is the band you assign (if applicable)
 - Criteria** - this is the criterion you assign
 - Distance** - do *not* edit this column (unless you are one of the few schools that measure their own distances and wish to overwrite the ones stored in our database).
- You can re-order the columns as you see fit, and can add extra columns to suit your requirements (eg. SIF received, Music aptitude applicant, Baptism Certificate etc.).
- You can add formulas, filters and formatting to assist with the ranking process, **however** these must be removed before you attempt to import the file.
- If you are splitting your workbook into separate worksheets, name the tabs to reflect the applicable band/group, but leave out any spaces or non-standard characters (% , " , ! , etc.) as these will cause the import to fail. For example, rather than calling a tab "Band A applicants", simply call it "A" or "BandA".
- You will need to ensure that you populate the Position, Criteria and Band column for every applicant (schools not using Bands can leave that column blank).
- The Band name and Criteria you assign must match the Band and Criteria set-up in SAM.

Adding Data Validation to an Excel spreadsheet

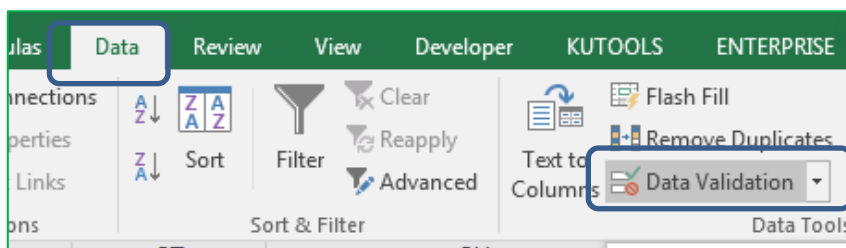
- This is not essential**, but to assist you with ranking on the spreadsheet you may want to create a data validation pick-list to save you having to Copy and Paste every time you want to add a band or criterion.
- In your full export from SAM, add a new worksheet using the + symbol at the bottom of the page.



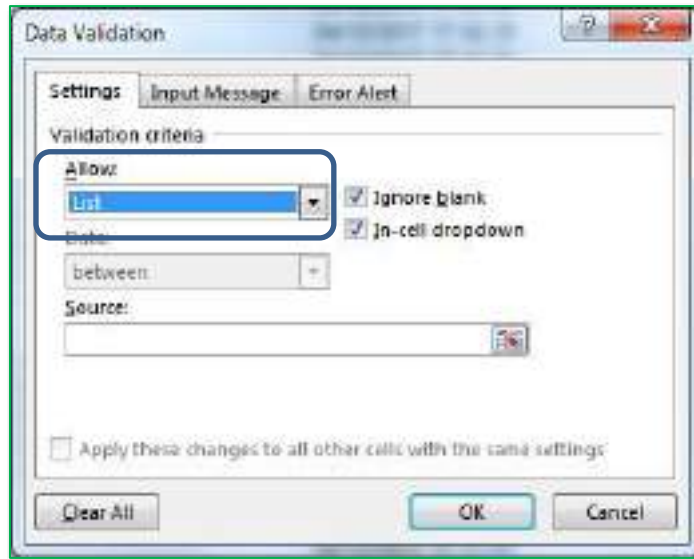
- In the new worksheet, type a list of all criterion. Make sure they *exactly match* the descriptions used in SAM. If you also utilise Bands you can have a list of those in a separate column.


	A	B	C
1	1. Catholic L.A.C.		Band 1
2	2. Baptised with Siblings		Band 2
3	3. Baptised (Church attendee)		Band 3
4	4. Baptised (non-attendee)		Unbanded
5	5. Non-Catholic L.A.C		
6	6. Siblings		
7	7. All Others (Distance)		

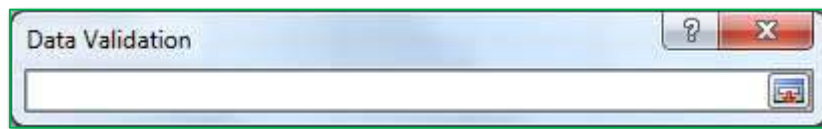
- Navigate back to your main worksheet and select all the cells in the Criteria column.
- Using the Excel options at the top, select Data then Data Validation (this may look different or be located in a different place if you are using an older version of Excel).



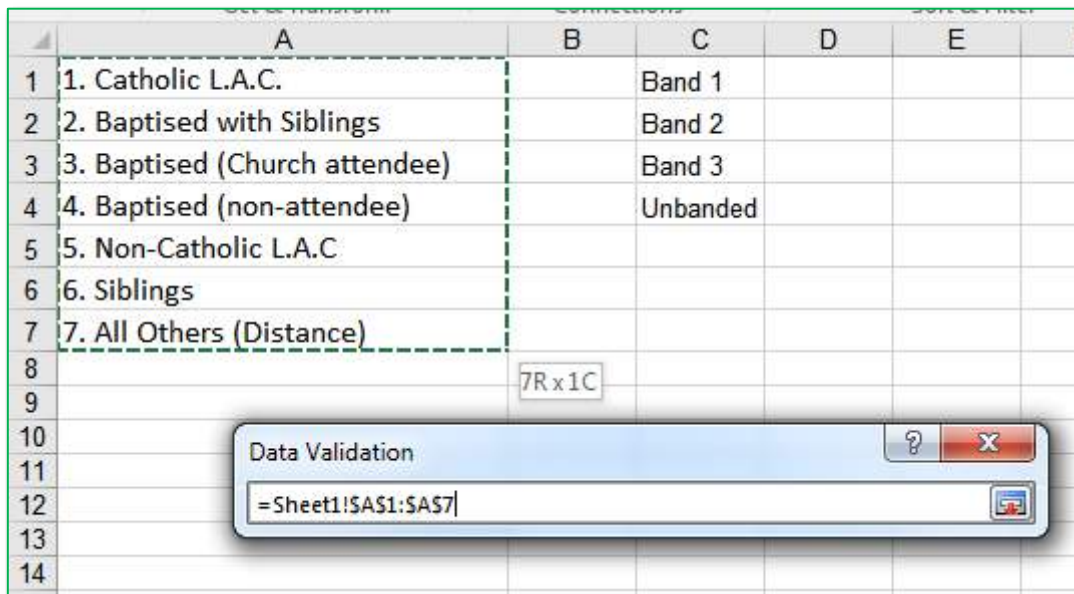
- A box will pop-up. Under Allow, change the dropdown menu to List.



- Under Source click the select range button which looks like this 
- When the following box appears, navigate to where you typed the criterion/bands.



- Clicking and holding the mouse, select all criterion options. It will look similar to the below.



- Press Enter and then OK, and the box will close.
- When you go back to the Criteria column in the mainsheet and click into a cell, you will now see a dropdown menu and you will only be able to pick an option from the list. This will prevent you from accidentally adding erroneous data into this column which would cause an import to fail in SAM.

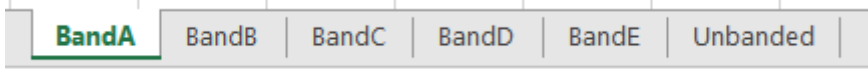
Data Tools		
	CV	CW
n Require	Criteria	Preference S
	1. Catholic L.A.C.	nding
	1. Catholic L.A.C.	nding
	2. Baptised with Siblings	nding
	3. Baptised (Church attendee)	nding
	4. Baptised (non-attendee)	nding
	5. Non-Catholic L.A.C	nding
	6. Siblings	nding
	7. All Others (Distance)	Pending
		Pending
		Pending

- Repeat the steps above for the Band column if required.

Importing the ranked list

Check the following before importing!

- The file is saved in the .xls format (Excel Workbook).
- Schools using Bands must have a *separate* worksheet for each band or group.

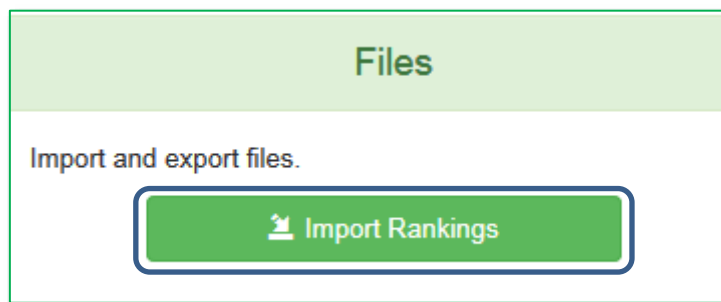


- Any individual worksheet names have spaces or non-standard characters removed in the worksheet name (eg. it should say “BandA” rather than “Band A”).
- The following columns are present and populated - AppRef, Position, Criteria, Distance.
- All Formulas, Filters and Conditional Formatting have been removed. Within Excel, once you are ready to upload, you may find it helpful to copy all the data and then ‘paste values’ into a fresh sheet. This function only pastes the *values* of the cells, so all formulas, filtering and formatting are removed.

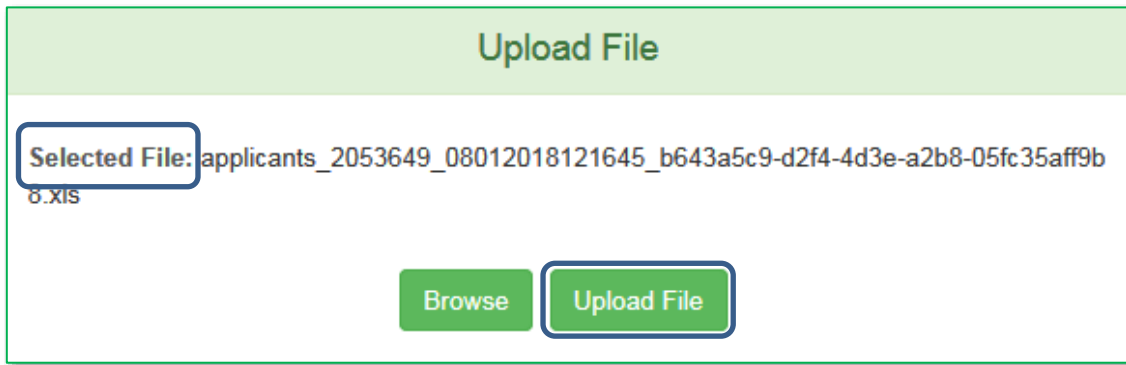
Paste Values



- From the Round Summary Screen, click Import Rankings (select Band first if applicable).



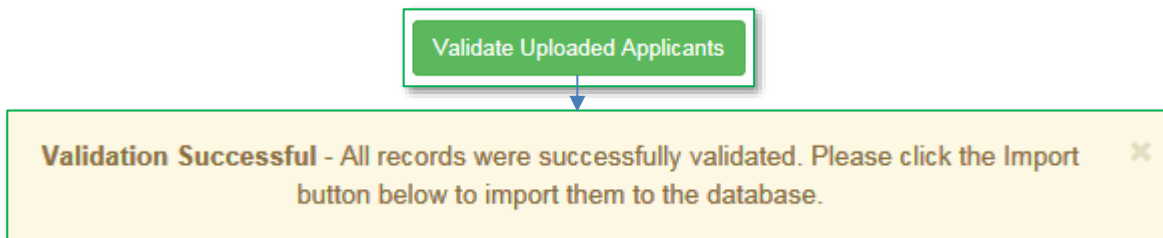
- Click Browse and then locate your spreadsheet. Then click Upload File.



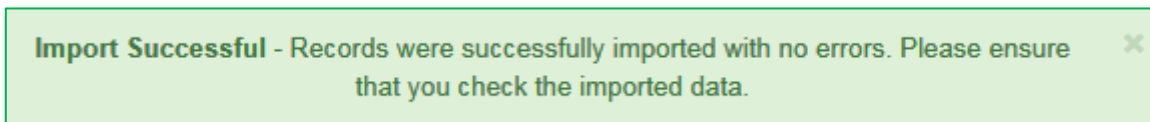
- If your spreadsheet is split into several worksheets (eg. one for each band/Group), select the one you wish to import.
- Assuming you didn't amend any column headings in the SAM export, the four main columns will match automatically, as per the screenshot on the next page.



- Click Validate Uploaded Applicants – this performs an initial check on the AppRef column to ensure all application reference numbers match ones in our database.



- Click Import to import the list position and criteria (and band and distance if applicable). If successful, the following message will be displayed.



- If applicable for your school, repeat until all Bands/Groups have been imported.
- You can check that the correct information has been imported by going to the Round Summary screen and clicking View Rankings.



- Select the Ranked list option, and then when loaded you can either view the rankings on the screen, or if preferred, export it to Excel so it can be printed or sent on to the Governors for verification.

Children with an EHCP and reduction to PANs

Please ensure that you have provided Croydon School Admissions Team with the number of children with an EHCP so that this number can be deducted from the school's PAN. Where banding is used, please also include what band these children are to be placed in so that band's intake can be reduced.

Supplementary Information Forms (SIF)

If a parent/carer has submitted a Supplementary Information Form (SIF) to the school, but has not completed an on time Common Application Form, their child's name will not appear on SAM. Where only a SIF has been completed, schools must send a list of all the applicants and their contact details to the school admissions team as soon as possible.

If the parent has completed a Common Application Form (CAF), but no SIF, the school must contact the parent and ask them to complete the SIF as soon as possible. Where no SIF has been completed the child must still be assigned a criterion and ranked. The child has to be considered under a lower criterion, e.g., 'distance' rather than 'Catholic'.

Secondary Schools only that use a banding test Where a child has not sat a banding test, they can be listed in a separate band e.g., band 0 rather than 1-5. This band will have 0 PAN capacity and will be considered after those that have sat the test (if there are still vacancies at the end of the allocation process) and are in higher bands, are offered a place at the school or a higher preference. Children in this band need to be assigned a criterion and rank. Croydon School Admissions Team will inform you when this band will need to be utilised.

IMPORTANT INFORMATION: When the school admissions team start running the allocation process, the admissions rounds (S26, J26 and R26) will be locked and you will not be able to view your list of applicants. You will be able to access the admissions rounds again on National Offer Day during the course of the afternoon.