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## Making entries for vocational qualifications via Interchange

A step-by-step guide for centres



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## Introduction

This guide demonstrates how to make entries for vocational qualifications via Interchange.

### Interchange

<https://interchange.ocr.org.uk>

For help getting started with Interchange, see our quick start guide

### Interchange quick start guide

<http://www.ocr.org.uk/Images/22056-getting-started-with-interchange.pdf>

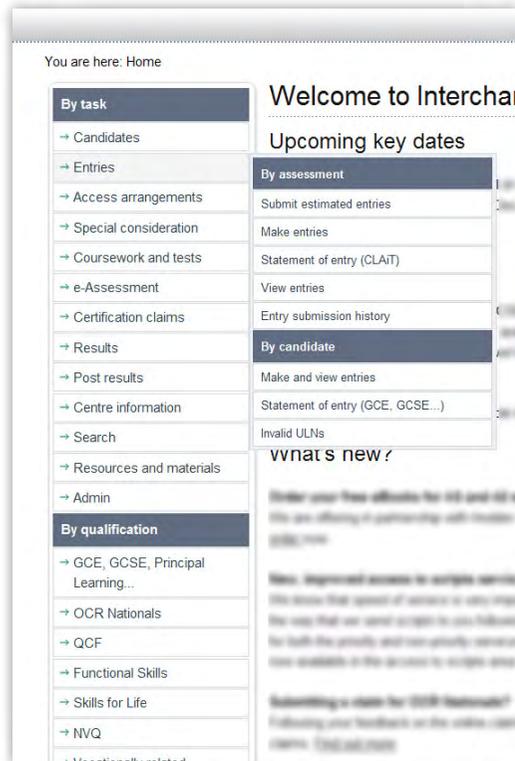
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## Log in to Interchange

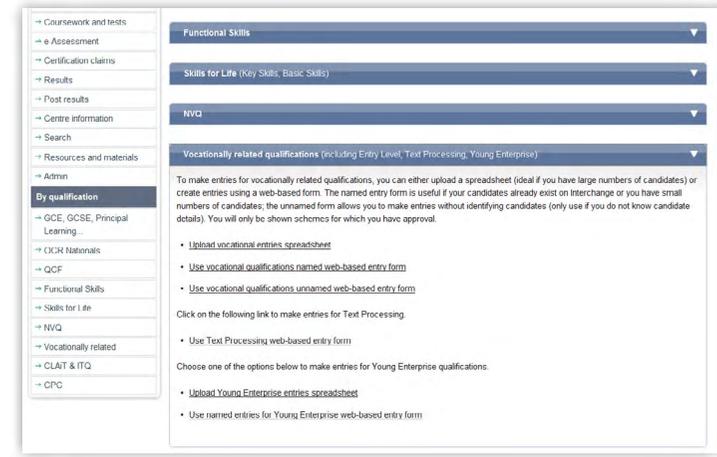
To get started, log in to Interchange, hover over 'Entries' in the left-hand menu and then click on 'Make entries'. Next, click on 'Vocationally related qualifications'. You then need to choose your entry method, depending on whether you're making **named** or **unnamed** entries.

If you are making **named** entries, you can use either a spreadsheet or a named web-based form. **Unnamed** entries are made via an unnamed web-based form.

*Choose 'Entries' from the left-hand menu*



*Choose entry method*





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### Spreadsheet validation

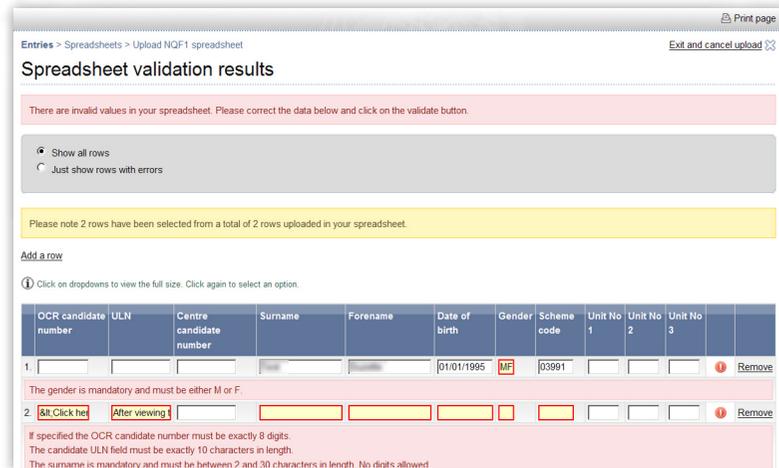
Once you've clicked 'Submit entries spreadsheet', Interchange will automatically validate the information. Any errors will show up in red. You will need to correct these before your entries can be processed. If necessary, make the amendments to your entry information and then click on 'Submit'.

**Note:** You can only enter candidates for qualifications you have full approval for.

You will then see a confirmation page where you can download a copy of your entries for your records.

**Note:** Please allow 6–10 working days for initial entries to be processed.

### Spreadsheet validation



Entries > Spreadsheets > Upload NQF1 spreadsheet

#### Spreadsheet validation results

There are invalid values in your spreadsheet. Please correct the data below and click on the validate button.

Show all rows  
 Just show rows with errors

Please note 2 rows have been selected from a total of 2 rows uploaded in your spreadsheet.

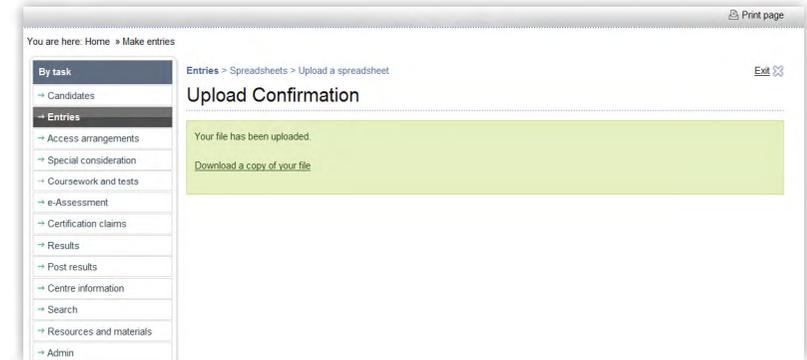
**Add a row**

Click on dropdowns to view the full size. Click again to select an option.

OCR candidate number	ULN	Centre candidate number	Surname	Forename	Date of birth	Gender	Scheme code	Unit No 1	Unit No 2	Unit No 3	
1					01/01/1995	M	03991				Remove
2	<small>Click here</small>	<small>After viewing</small>									Remove

The gender is mandatory and must be either M or F.  
If specified the OCR candidate number must be exactly 8 digits.  
The candidate ULN field must be exactly 10 characters in length.  
The surname is mandatory and must be between 2 and 30 characters in length. No digits allowed.

### Upload confirmation



You are here: Home > Make entries

By task

- Candidates
- Entries
- Access arrangements
- Special consideration
- Coursework and tests
- e-Assessment
- Certification claims
- Results
- Post results
- Centre information
- Search
- Resources and materials
- Admin

Entries > Spreadsheets > Upload a spreadsheet

### Upload Confirmation

Your file has been uploaded.

[Download a copy of your file](#)

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## Using the web-based form (named entries)

This method is useful if your candidates already exist on Interchange or you only have a few candidates to enter.

### Select assessment

Click on the 'Use vocational qualifications named web-based form' link. You will then be asked to select your assessment.

You can find your assessment by searching for the assessment code, title or part title and then clicking on 'Find assessment'. If you leave the search box blank, all the vocational qualifications for which you are approved will appear in the dropdown list.

Select the qualification you require and click 'OK'.

### Select assessment

The screenshot shows the 'Make OCR Nationals claim' page. It includes a navigation menu on the left with options like 'Candidates', 'Entries', and 'By qualification'. The main content area shows 'Edit claim' for '06502: OCR Level 3 National Certificate in ICT'. Below this is the 'Add candidate to claim' section, which has a 'Find candidate' search box and a table of existing candidates.

Candidate name	OCR candidate number	Date of birth	Action
...	13520736	...	<a href="#">Create new</a>
...	13520737	...	<a href="#">Create new</a>
...	13520738	...	<a href="#">Create new</a>
...	13520739	...	<a href="#">Create new</a>
...	13520740	...	<a href="#">Create new</a>
...	13520741	...	<a href="#">Create new</a>
...	13520742	...	<a href="#">Create new</a>
...	13520743	...	<a href="#">Create new</a>
...	13520744	...	<a href="#">Create new</a>
...	13520745	...	<a href="#">Create new</a>

### Select candidates

Next, you need to select your candidates. You can do this by choosing individual candidates or whole candidate groups. You should select existing candidates rather than creating new ones; however, if you cannot find a candidate, you can enter their details.

When searching for existing candidates, you can restrict the search to show only candidates added during a given time period, from 'today' to 'in the last five years'. You can also find the candidate by searching for their name, part name, UCI or candidate number. Enter your search criteria and click 'Find candidate'.

**Note:** If your search returns multiple results, you can arrange them by clicking on any one of the following column headings: *Candidate number, Name, UCI or Date of birth.*

Next, select the candidate you would like to make entries for by clicking in the tick box next to their details and then clicking the 'Add selected candidates' button. These candidates will then appear in the list on the right-hand side of the screen. Once you have selected all the candidates you need, click 'Next'.

**Note:** You can create bespoke candidate groups within Interchange, tailored to include candidates of your choice. To create a bespoke candidate group, log in to Interchange, hover over 'Candidates' in the left hand menu and click on 'Candidate groups'.

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### Select candidates

Select assessment > **Select candidates** > Entry options > Entry summary > Entry confirmation Exit and cancel entry

#### Make entries - select candidates

03991: NQF - OCR Level 1 Award in IT User Skills (ITQ)

Selected candidates (0)

To avoid re-entering candidate details, you can search for candidates that have previously been added

Only show candidates added in the last 5 years

**Find candidate group:**

Enter name, part name, UCI or candidate no.

[More search options](#)

(from this page)

Cand. no.	Name	UCI	Date of birth	
<input type="checkbox"/>	1234	test candidate	10/12/2011	<a href="#">Edit</a>
<input type="checkbox"/>	924	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	925	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	926	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	927	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	928	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	929	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	930	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	931	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	932	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	933	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	934	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	935	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	936	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	937	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	938	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	939	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	940	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	941	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	942	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	943	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	944	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	945	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	946	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	947	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	948	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	949	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	950	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	951	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	952	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	953	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	954	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	955	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	956	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	957	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	958	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	959	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	960	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	961	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	962	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	963	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	964	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	965	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	966	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	967	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	968	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	969	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	970	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	971	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	972	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	973	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	974	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	975	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	976	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	977	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	978	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	979	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	980	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	981	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	982	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	983	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	984	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	985	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	986	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	987	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	988	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	989	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	990	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	991	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	992	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	993	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	994	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	995	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	996	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	997	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	998	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	999	Test candidate	01/01/1980	<a href="#">Edit</a>
<input type="checkbox"/>	1000	Test candidate	01/01/1980	<a href="#">Edit</a>

(from this page)

Select assessment > **Select candidates** > Entry options > Entry summary > Entry confirmation Print page

#### Make entries - select candidates

03991: NQF - OCR Level 1 Award in IT User Skills (ITQ)

Selected candidates (3)

To avoid re-entering candidate details, you can search for candidates that have previously been added

Only show candidates added in the last 5 years

**Find candidate group:**

Enter name, part name, UCI or candidate no.

[More search options](#)

Cand. no.	Name	Date of birth	
<input type="checkbox"/>	1234	test candidate	<a href="#">Remove</a>
<input type="checkbox"/>	924	Test candidate	<a href="#">Remove</a>
<input type="checkbox"/>	925	Test candidate	<a href="#">Remove</a>

(from this page)

Showing 1-15 of 16 Previous 1 2 Next Show all

### Select entry options

You will then be asked to select your entry options for each candidate. You can choose to make either a full award entry or unit entries. If you're making unit entries, you can make up to three unit entries at once.

Select the entry option you need by clicking in the relevant radio button (either 'Full award entry' or 'Unit entry'). Next, tick the box for each candidate you want to enter for your chosen option and click on 'Apply to selected'. Repeat this process until you have input entry options for all candidates in the list and, once you're finished, click 'Next'.

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### Select entry options

Select assessment > Select candidates > **Entry options** > Entry summary > Entry confirmation Add more candidates + Exit and cancel entry X

**Make entries - entry options**

03991: NQF - OCR Level 1 Award in IT User Skills (ITQ)

**Please specify entry details for these candidates**

Please select the type of entry for these candidates

Full award entry

Unit entry    Enter up to 3 unit numbers at a time

Apply to selected

<input checked="" type="checkbox"/>	Cand. no.	Name	Date of birth	Entry details	
<input checked="" type="checkbox"/>		The candidate's name	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>		The candidate's name	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>		The candidate's name	01/01/1980	Not yet specified	Remove

Next >

Select assessment > Select candidates > **Entry options** > Entry summary > Entry confirmation Add more candidates + Exit and cancel entry X

**Make entries - entry options**

03991: NQF - OCR Level 1 Award in IT User Skills (ITQ)

**Please specify entry details for these candidates**

Please select the type of entry for these candidates

Full award entry

Unit entry    Enter up to 3 unit numbers at a time

Apply to selected

<input type="checkbox"/>	Cand. no.	Name	Date of birth	Entry details	
<input type="checkbox"/>		The candidate's name	01/01/1980	Full award	Remove
<input type="checkbox"/>		The candidate's name	01/01/1980	Full award	Remove
<input type="checkbox"/>		The candidate's name	01/01/1980	Units 1, 2, 3	Remove

Next >

### Submit your entries

You will then see the entry summary screen. Here, you can review the details of your entries before submitting them.

**Note:** If any of these details are incorrect, you must amend them **before** you submit. If you want to go back and amend the entry details, click on the relevant link on the right-hand side of the screen ('Change entry options', 'Add more candidates' or 'Exit and cancel entry') or, if you simply want to remove a candidate from the entry, click 'Remove' next to their name.

You can enter an order number/reference here if you wish.

Once you've checked the details, added an order number (if necessary) and you're happy that everything is correct, click on 'Submit entries' to submit your vocational qualification entries.

You will then see a confirmation page where you can download a copy of your entries for your records.

### Submit your entries

Select assessment > Select candidates > Entry options > **Entry summary** > Entry confirmation Change entry options > Add more candidates + Exit and cancel entry X

**Make entries - entry summary**

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**Candidates entries (3)**

Please review and submit the entries to complete

Cand No.	Name	UCI	UIN	Date of birth	Entry details	
	The candidate's name			01/01/1980	Full award	Remove
	The candidate's name			01/01/1980	Full award	Remove
	The candidate's name			01/01/1980	Units 1, 2, 3	Remove

Order number / reference

ⓘ Please note that one order number can be assigned to multiple entries. This number will be quoted on your invoice.

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*Entry confirmation*

Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation [Return to homepage](#)

### Make entries - entry confirmation

Make new entries

Make new:  entries for the same candidates

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You have successfully submitted the following entries

Candidates entries (3)

Cand No.	Name	UCI	ULN	Date of birth	Entry details
	Mr John Smith			01/01/1980	Full award
	Mr John Smith			01/01/1980	Full award
	Mr John Smith			01/01/1980	Units 1, 2, 3

Order number / reference:

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## Using the web-based form (unnamed entries)

To make unnamed entries, you use a web-based form.

### Select assessment

Click on the 'Use vocational qualifications unnamed web-based form' link. You will then be asked to select your assessment.

You can find your assessment by searching for the assessment code, title or part title and then clicking on 'Find assessment'.

Select the qualification you require and click 'OK'.

Select assessment

### Select entry quantities

You will then be asked to enter the quantities of each entry type – either full award or unit entries.

**Note:** Some qualifications are only available for unit entries. Please see the relevant centre handbook for more information

Enter the number of each entry type you'd like in the relevant boxes and then click on 'Add'. The entries will appear in the list on the right-hand side of the screen.

Once you have added all unnamed entries for all assessments, click 'Next'.

**Note:** You can edit or remove any entries here before submitting.

### Select entry quantities

OCR Cand. no.	Candidate name	Centre assessor	Grade	Assessed as	State
13520741	NATIONALS, FIVE		C P C M D C	Not Claiming	Apply to all
13520742	NATIONALS, FOUR		C P C M D C	Not Claiming	
13520743	NATIONALS, THREE		C P C M D C	Not Claiming	
13520744	NATIONALS, TWO		C P C M D C	Not Claiming	
13520745	NATIONALS, ONE		C P C M D C	Not Claiming	

### Confirm entry quantities

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### Submit your entries

You will then see the entry summary screen. Here, you can review the details of your entries before submitting them.

**Note:** If any of these details are incorrect, you must amend them **before** you submit. If you want to go back and amend the entry details, click on the relevant link on the right-hand side of the screen ('Add more entries' or 'Exit and cancel entry') or, if you simply want to remove a candidate from the entry, click 'Remove' next to their name.

You can enter an order number/reference here if you wish.

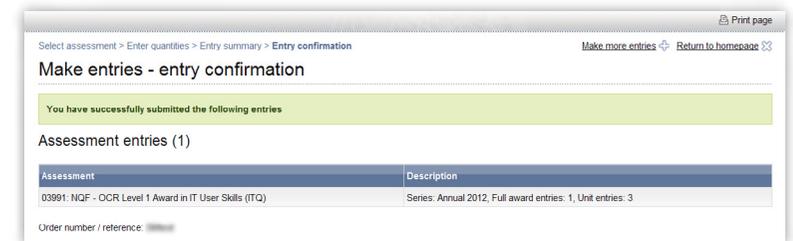
Once you've checked the details, added an order number (if necessary) and you're happy that everything is correct, click on 'Submit entries' to submit your vocational qualification entries.

You will then see a confirmation page.

### Submit your entries



### Entry confirmation



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## Viewing entries

You can view all entry information within Interchange. To access this area, hover over 'Entries' in the left-hand menu and then click on 'Entry submission history'. Click on the 'Vocationally related qualifications' heading – from here, you can view details of all named and unnamed entries.

### Named entries

There are two tabs on this page - 'Online Submissions' and 'Uploaded spreadsheets'. The 'Online Submissions' tab is the default.

If you've submitted your entries using the web-based form, click on the 'View named vocationally related qualifications entry submission history' link. You will then see a list of all named entries, with the most

recent at the top of the list. You can filter the results by selecting a date range and order number (if applicable). To view the entries, click on 'View details' in the 'Action' column.

If you've submitted your entries using the spreadsheet, click on the 'Uploaded spreadsheets' tab. You will then see a list of all named entries submitted by spreadsheet, with the most recent at the top of the list. An 'entry status' will be visible for each entry. The status will indicate whether you need to take any action to help us process your entries successfully.

Descriptions of each of the status messages (including any action required) are given in the table below:

Status	Description	Action required?
<b>Duplicate file</b>	The spreadsheet could not be processed as it contains duplicate entries	Please call the OCR Customer Contact Centre to resolve this issue
<b>Empty file</b>	The spreadsheet does not contain any details	Please check and upload the spreadsheet again
<b>OCR handling this</b>	We are currently resolving the outstanding issues with the spreadsheet	None required
<b>Processing complete</b>	The spreadsheet has been successfully uploaded and processed	None required
<b>Processing in progress</b>	We are currently resolving any issues with the spreadsheet	None required
<b>Read and recognised</b>	The spreadsheet has been successfully uploaded and is currently being processed	None required
<b>Read and rejected</b>	The spreadsheet is incorrectly formatted or there was a problem processing the file	Please call the OCR Customer Contact Centre to resolve this issue
<b>Upload failed</b>	The spreadsheet could not be uploaded	Please check and upload the spreadsheet again

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### Unnamed entries

Click on the 'View unnamed vocationally related entry submission history' link. You will then see a list of all unnamed entry submissions, with the most recent at the top of the list. You can filter the results by selecting various search criteria including entry code, submission date, process status, order number and submitter.

To view the entries, click on 'View' in the 'Actions' column.

#### Entry submission history

The screenshot shows the 'Welcome to Interchange' page with a navigation menu on the left. The 'Entries' menu item is highlighted, and a sub-menu is displayed with the following options:

- By task
  - Candidates
  - Entries**
  - Access arrangements
  - Special consideration
  - Coursework and tests
  - e-Assessment
  - Certification claims
  - Results
  - Post results
  - Centre information
  - Search
  - Resources and materials
  - Admin
- By qualification
  - GCE, GCSE, Principal Learning...
  - OCR Nationals
  - QCF
  - Functional Skills
  - Skills for Life
  - NVQ

The 'By candidate' sub-menu is also visible, containing options like 'Submit estimated entries', 'Make entries', 'Statement of entry (CLAIT)', 'View entries', 'Entry submission history', 'Make and view entries', 'Statement of entry (GCE, GCSE...)', and 'Invalid ULNs'.

#### Entry submission history (search results)

The screenshot shows the 'View entry submissions' page. It includes a filter section with the following details:

- Code:** 03991
- Date submitted:** Anytime
- Order no.:** [Empty]
- Submitted by:** Anyone
- Processed:** Yes (selected), No, Don't mind

Below the filters is a table of results:

Submitted	Code	Title	Qualification	Order no.	Entries	Processed	Actions
17/01/2012	03991	OCR Level 1 Award in IT User Skills (ITQ)	NQF	5	1	Yes	<a href="#">View</a>
17/01/2012	03991	OCR Level 1 Award in IT User Skills (ITQ)	NQF	5	5	Yes	<a href="#">View</a>
06/01/2012	03991	OCR Level 1 Award in IT User Skills (ITQ)	NQF	5	6	Yes	<a href="#">View</a>
14/11/2011	03991	OCR Level 1 Award in IT User Skills (ITQ)	NQF	5	5	Yes	<a href="#">View</a>

#### View entry details

The screenshot shows the 'Entry submission' details page for a specific entry. It includes the following information:

- Submission details:** Submitted on 17 January 2012 at 14:23, Submitted by [Name], Order no. [Number], Processed: Yes.
- Assessment details:** Code: 03991, Title: OCR Level 1 Award in IT User Skills (ITQ), Qualification: NQF.
- Entries for this assessment (1):** A table showing one entry with details:
 

Cand. no.	Name	UCI	ULN	Date of birth	Option	Actions
[Number]	[Name]	[Code]	[Code]	01/01/1995	Full entry	<a href="#">View</a>

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## Further support

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