

QCF entries

Introduction

- **Log into Interchange**
- Uploading a spreadsheet (named)
 - Download and complete the entries spreadsheet
 - Spreadsheet validation
- Using the web-based form (named)
- Using the web-based form (unnamed)
- Viewing entries
 - Named entries
 - Unnamed entries
- Further support

Making entries for vocational qualifications via Interchange

A step-by-step guide for centres





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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

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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

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|------------------------------------|--|
| → Candidates | Upcoming key dates |
| → Entries | By assessment |
| → Access arrangements | Submit estimated entries |
| → Special consideration | Make entries |
| → Coursework and tests | Statement of entry (CLAiT) |
| → e-Assessment | View entries |
| → Certification claims | Entry submission history |
| → Results | By candidate |
| → Post results | Make and view entries |
| → Centre information | Statement of entry (GCE, GCSE) |
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Choose entry method





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Uploading a spreadsheet (named entries)

Download and complete the entries spreadsheet

This method is ideal if you have large numbers of candidates. Click on 'Upload vocational entries spreadsheet' and then download the spreadsheet from the following page, saving it in a secure location on your computer. Complete the spreadsheet – either manually or by importing data from your management information system.

Note: If you need help filling out the spreadsheet, read the instructions on how to complete it by clicking on the help link (delete this line from the spreadsheet before you submit it).

Remember that some of the fields are mandatory (shown in yellow).

When you have completed the spreadsheet , please save it in either **XLS** or **CSV** format. Next, click on 'Browse' to find your saved spreadsheet, add an order number or reference in the box provided and then click on 'Submit entries spreadsheet'.

Download spreadsheet



Complete spreadsheet

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Spreadsheet validation

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isneet 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



Upload confirmation

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| u are here: Home » Make entrie | S | |
| By task | Entries > Spreadsheets > Upload a spreadsheet | Exit 😒 |
| → Candidates | Upload Confirmation | |
| → Entries | | |
| → Access arrangements | Your file has been uploaded. | |
| → Special consideration | Download a copy of your file | |
| -+ Coursework and tests | | |
| → e-Assessment | | |
| → Certification claims | | |
| → Results | | |
| → Post results | | |
| → Centre information | | |
| → Search | | |
| → Resources and materials | | |
| → Admin | | |



OCF entries

Using the web-based form (named entries)

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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 gualifications for which you are approved will appear in the dropdown list.

Select the qualification you require and click 'OK'.

Select assessment

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| By task | Make OCR Nati | onals claim | | |
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| Coursework and tests | Add candidate to cla | im | | rige to another guarineation |
| e-Assessment | | | | |
| Certification claims | Find candidate | | | |
| Results | Enter name, part name or C | CR candidate number | | |
| Post results | | Find candidate | | |
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| QCF | WITCHALL FOLD | 13520742 | 10000 | Create new |
| Functional Skills | Infilmed, 1988 | 13520743 | 11011100 | Create new |
| Skills for Life | 14/10/14L0.1000 | 13520744 | 110010-0000 | Create new |
| | Intelligence in case | 13520745 | and the second sec | Create new |

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'.



Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation

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Select candidates

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Select entry options

Exit and cancel entry 🔀

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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| Make entries | - entry options | | | |
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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 ('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

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| Select assessment | > Select candidates > Entry options > Entr ies - entry confirmation | y summary > Entry cor ON | firmation | | Return to homepage |
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| Make new entr | ies | | | | |
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entries spreadsheet

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

Select assessment

Click on the 'Use vocational gualifications 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'.

Using the web-based form (named) Select assessment Make entries - enter quantities Using the web-based form (unnamed) Assessment entries (0) Select assessment Assessment details Assessment code 03991 Title OCR Level 1 Award in IT User Skills (ITO Qualification NQF Enter quantities (i) Candidates can either be entered for the full award or individual units

Series Annual 2015 Full award entries Unit entries Add Cancel

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 righthand 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

| → Candidates | Details | | | | Related a | ctions | |
|-------------------------|---|--|------------------------------------|--------------|---------------------------------|---|-------|
| | Qualification Unit name Unit no OCR assessor | 06502: OCR Leve Advanced databas 6 | l 3 National Certificate in ses | ICT | <u>Change t</u> <u>View cen</u> | o another qualificatio tre assessors | n |
| → Certification claims | - | | | | | | |
| → Results | Find candidate | | | | | | |
| → Post results | | | | | | | |
| → Centre information | Add new ca | andidates | | | | | |
| → Search | - | | | - | _ | | |
| Resources and materials | OCR Cand. no. | Candidate name | Centre assessor | Grade | | Assessed as | State |
| → Admin | 13520741 | NATIONALS, FIVE | | CPCMCD® No | t Claiming | Apply to all | |
| By qualification | 13520742 | NATIONALS, FOUR | - | CPCMCDCN | t Claiming | | |
| + GCE GCSE Principal | 13520743 | NATIONALS, THREE | illigen 💌 | CPCM @ DC No | t Claiming | | |
| Learning | 13520744 | NATIONALS, TWO | inan 💌 | CPCM @ DC No | t Claiming | | |
| → OCR Nationals | 13520745 | NATIONALS, ONE | inan 💌 | CPCM @DC No | t Claiming | | |
| → QCF | Save claim | Cancel | | | | | |

Confirm entry quantities





QCF entries

Introduction

- **Log into Interchange**
- Uploading a spreadsheet (named)
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 - Spreadsheet validation
- Using the web-based form (named)
- Using the web-based form (unnamed)
- Viewing entries
 - Named entries
 - Unnamed entries
- Further support

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

| | 은 Print page |
|---|---|
| Select assessment > Enter quantities > Entry summary > Entry confirmation | Make more entries 🕂 Return to homepage 🔀 |
| Make entries - entry confirmation | |
| You have successfully submitted the following entries | |
| Assessment entries (1) | |
| Assessment | Description |
| 03991: NQF - OCR Level 1 Award in IT User Skills (ITQ) | Series: Annual 2012, Full award entries: 1, Unit entries: 3 |
| Order number / reference: | |



QCF entries

Viewing entries

Introduction

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



QCF entries

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Further support

Unnamed entries

Click on the 'View unnamed vocationally related entry submission history' link. You will then see a list of all unnamed entries, 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

| By task | Welcome to Intere | | | | |
|------------------------------------|---|--|--|--|--|
| → Candidates | Upcoming key dates | | | | |
| → Entries | By assessment | | | | |
| → Access arrangements | Submit estimated entries | | | | |
| Special consideration | Make entries | | | | |
| → Coursework and tests | Statement of entry (CLAiT) | | | | |
| → e-Assessment | View entries | | | | |
| → Certification claims | Entry submission history | | | | |
| → Results | By candidate | | | | |
| → Post results | Make and view entries | | | | |
| → Centre information | Statement of entry (GCE, GCSE) | | | | |
| → Search | Invalid ULNs | | | | |
| Resources and materials | vvnats new? | | | | |
| → Admin | Drate year free allocity for 40 a | | | | |
| By qualification | To polythering in particular with addression | | | | |
| → GCE, GCSE, Principal Learning | No. Name of Academic Academic | | | | |
| + OCR Nationals | He does hat special districts in a | | | | |
| → QCF | to had the priority and one provide | | | | |
| + Functional Skills | the automotive site | | | | |
| → Skills for Life | Admitting a class for DOR facto | | | | |
| * NVQ | Falcony per fechant in the set | | | | |

Entry submission history (search results)

| By task | View e | ntry | submissions | | | | | |
|---|---|---|---|---|-----------|------------------------|---------------------------------------|--|
| → Candidates | Namod | Stan | dard vocational | | | | | |
| → Entries | Nameu | otan | | | | | | |
| → Access arrangements | Filter res | ults | | | | | | |
| → Special consideration | | | | | _ | | | |
| → Coursework and tests | Code | | 03991 | Order no. | | | | |
| → e-Assessment | Processo | nittea | Anytime | Submitted by | Anyone | · · | | |
| Certification claims | | | o res o no o Dont mina | | | | | |
| → Results | Gu | | | | | | | |
| | | | | | | | | |
| → Post results | | | | | | | | |
| → Post results → Centre information | Submitted | Code | Title | Qualification | Order no. | Entries | Processed | Action |
| → Post results → Centre information → Search | Submitted 17/01/2012 | Code 03991 | Title OCR Level 1 Award in IT User Skills (ITQ) | Qualification NQF | Order no. | Entries | Processed Yes | Action |
| → Post results → Centre information → Search + Resources and materials | Submitted 17/01/2012 17/01/2012 | Code 03991 03991 | Title OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) | Qualification NQF NQF | Order no. | Entries 1 5 | Processed Yes Yes | Action <u>View</u> |
| → Post results → Centre information → Search → Resources and materials → Admin | Submitted 17/01/2012 17/01/2012 06/01/2012 | Code 03991 03991 03991 | Title OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) | Qualification NQF NQF NQF | Order no. | Entries 1 5 6 | Processed Yes Yes Yes | Action View View View |
| | Submitted 17/01/2012 17/01/2012 06/01/2012 14/11/2011 | Code 03991 03991 03991 03991 | Title OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) | Qualification NQF NQF NQF NQF NQF | Order no. | Entries 1 5 6 5 | Processed Yes Yes Yes Yes | Action View View View |
| → Post results → Centre information → Search → Resources and materials → Admin By qualification → GCE, GCSE, Principal Learning | Submitted 17/01/2012 17/01/2012 06/01/2012 14/11/2011 | Code 03991 03991 03991 03991 03991 | Title OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) OCR Level 1 Award in IT User Skills (ITQ) | Qualification NQF NQF NQF NQF | Order no. | Entries 1 5 6 5 5 | Processed Yes Yes Yes Yes | Action View View View View |

View entry details

| | | | | | | | Print | |
|---|----------------------|--------------------------|-----|-----|---|----------------------|---------|--|
| are here: Home » Entry subn | nission history | | | | | | | |
| By task | Entry sub | mission | | | | | | |
| → Candidates | Submission de | taile | | | | | | |
| → Entries | | | | | | | | |
| Access arrangements | Submitted | 17-January-2012 at 14:23 | | S | ubmitted by | properties cares | | |
| Special consideration | Processed | Yes | | 0 | rder no. | 30 th tot | | |
| Coursework and tests | | | | | | | | |
| • e-Assessment | Assessment de | tails | | _ | | | | |
| Certification claims | | and the second second | | | | | | |
| * Results | Code | 03991 Title OCR | | | Title OCR Level 1 Award in IT User Skills (ITQ) Qualification NQF | | | |
| + Post results | | | | | | | | |
| Centre information | | | | | | | | |
| + Search | | | | | | | | |
| Resources and materials | Entries for this | assessment (1) | | | | | | |
| → Admin | | | | | 0 | 0.0 | 4.10 | |
| By qualification | Cano. no. | Name | UCI | ULN | Date of birth | Option | Actions | |
| GCE, GCSE, Principal Learning | Return to entry list | 100-1100 | | | 01/01/1995 | Full entry | | |
| OCR Nationals | | | | | | | | |
| → QCF | | | | | | | | |



QCF entries

Further support

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OCR Customer Contact Centre 02476 851509 vocational.gualifications@ocr.org.uk

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