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## Making online claims for Cambridge Technicals

A step-by-step guide for centres



Welcome to Intercha





# Interchange **Step-by-step** guide

## Cambridge Technicals Claims

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## Introduction

This guidance demonstrates how to make online claims for Cambridge Technicals via Interchange.

### Interchange

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

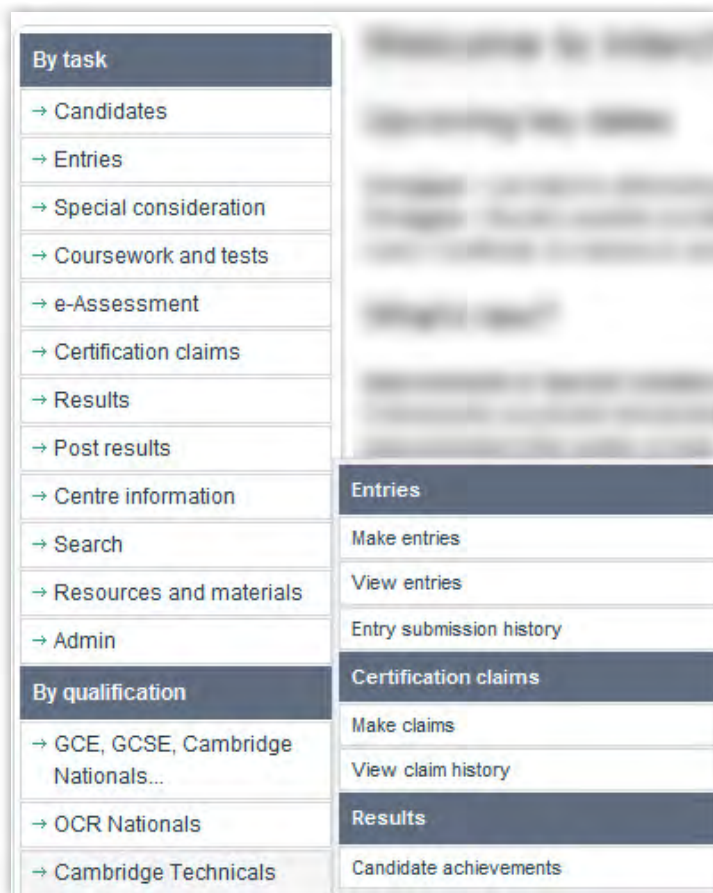
### Interchange quick start guide

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## Starting your online claim

To get started, log in to Interchange, hover over Cambridge Technicals in the left-hand menu and then click on 'Make claims'.

*Choose Cambridge Technicals from the left-hand menu*





# Interchange Step-by-step guide

# Cambridge Technicals Claims

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## Select a qualification

You will then be able to see a list of the Cambridge Technicals qualifications for which you have approval and the status of any claims.

If you cannot see this area, check with your Interchange Centre Administrator that you have the correct Interchange role – you need either the 'Centre Administrator' or the 'Tutor/Teacher' role.

**Note:** You will not be able to build or submit a claim without valid entries. You must ensure that all entries (including top up/moving down entries) are made at least four weeks before a planned moderation visit. Select a qualification

**Note:** A claim can be built over a period of time and can contain multiple candidates and units. However, you will need to submit your claim at least two weeks before your scheduled moderation visit. Please only submit a claim when you are ready for it to be moderated and processed.

If you're approved for a lot of Cambridge Technicals qualifications, you can search by entry code, title or part title in the find assessment area. Hover over Cambridge Technicals in the left-hand menu and click on 'Make claim'. Select the qualification from the list, clicking 'Create' next to the qualification title. Then select '**By Candidate**' or '**By Unit**' to begin building your claim.

Selecting '**By Candidate**' allows you to build your claim by selecting individual candidates. This is particularly useful when claiming multiple or all units for a particular candidate.

Selecting '**By Unit**' allows you to begin building a claim by choosing units for the qualification. This is particularly useful if one teacher is responsible for a unit or subject area and wants to build a unit claim, eg per term.

It is possible to build claims over time using both the 'By Candidate' and 'By Unit' methods for the same claim.

**Note:** Claims can be built over a period of time. Once you've started a claim (but not yet submitted it) 'Create' next to the claim details will change to 'Edit'. You can edit a claim by candidate or by unit. You can only start a new claim if all previous claims for that qualification have been submitted.

The screenshot shows the 'Make claim' interface. On the left is a navigation menu with options like 'Candidates', 'Entries', 'Access arrangements', etc. The main area has a search box for 'Find assessment' with the code '05325' entered. Below the search box is a table of results showing 16-30 of 67 items. The table has columns for Code, Qualification, Status, and Action. A dropdown menu is open for the first row, showing options for 'By Candidate' and 'By Unit'.

Code	Qualification	Status	Action
05318	OCR Level 3 Cambridge Technical Extended Diploma in Health and Social Care	No claim created	Create
05320	OCR Level 2 Cambridge Technical Certificate in Business	No claim created	Create
05322	OCR Level 2 Cambridge Technical Extended Certificate in Business	No claim created	Create
05325	OCR Level 2 Cambridge Technical Diploma in Business	Last claim Submitted	Create
05327	OCR Level 3 Cambridge Technical Certificate in Business	No claim created	By Candidate
05329	OCR Level 3 Cambridge Technical Introductory Diploma in Business	No claim created	By Unit
05332	OCR Level 3 Cambridge Technical Subsidiary Diploma in Business	No claim created	By Unit
05335	OCR Level 3 Cambridge Technical Diploma in Business	No claim created	Create
05338	OCR Level 3 Cambridge Technical Extended Diploma in Business	No claim created	Create
05340	OCR Level 2 Cambridge Technical Certificate in IT	Last claim Sampled	Create
05342	OCR Level 2 Cambridge Technical Extended Certificate in IT	Last claim Sampled	Create
05345	OCR Level 2 Cambridge Technical Diploma in IT	Last claim Sampled	Create

**Note:** It is possible to access your OCR Nationals claims within the Cambridge Technicals area and vice versa.



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## Adding your assessment personnel

The first time you create a claim for each qualification, you will need to set up your **centre assessors**.

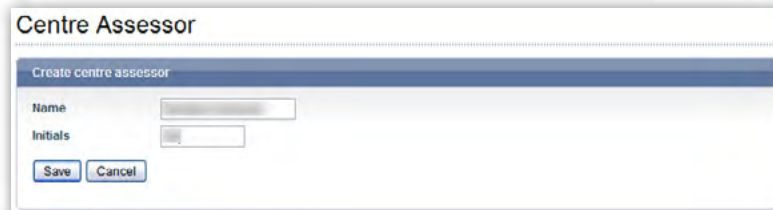
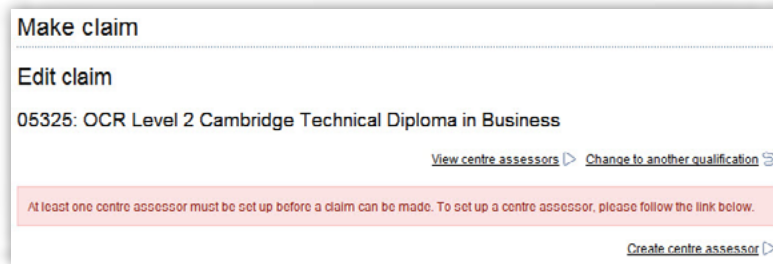
**Note:** These are the people within **your centre** who will be marking the assessment – not the OCR Assessor.

Type the centre assessor's full name and initials in the boxes provided. Up to four initials will be accepted and these should be unique within your centre. Alternatively, instead of using initials which are often not unique; if your centre allocates teacher codes, use those instead.

Make sure you set up your new centre assessors for each qualification before you start building the claim.

**Note:** Any number of centre assessors can build a claim, but only one of the assessors should submit it.

*Set up centre assessor*



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## Claiming by candidate

### Adding candidates to a claim

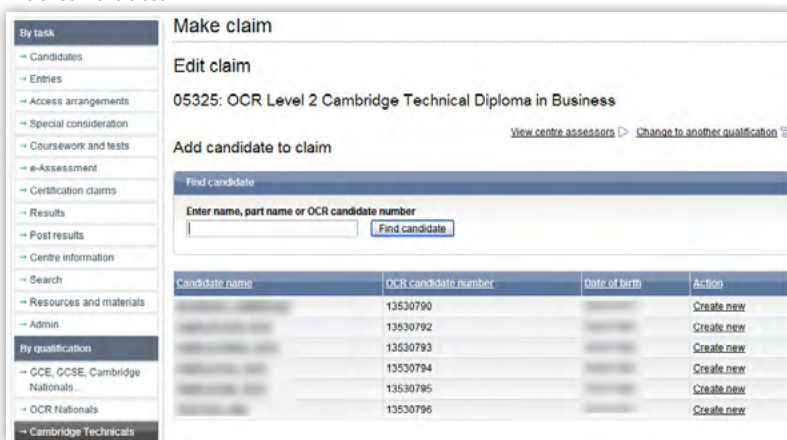
When you click on 'Create' and then 'By Candidate' next to a qualification title, you will see a list of all eligible candidates.

To begin building a claim for a candidate, click on 'Create new' next to the candidate's name. You will then see either all the available units for the qualification or, if you made unit entries, all the units the candidate is entered for.

**Note:** If you have only entered one centre assessor, you will see the assessor name pre-populated for every unit.

**Note:** If you have multiple candidates listed, you can sort the results by clicking on the column headings: Candidate name, OCR candidate number, Date of birth or Action.

#### Add candidates



Candidate name	OCR candidate number	Date of birth	Action
[Redacted]	13530790	[Redacted]	Create new
[Redacted]	13530792	[Redacted]	Create new
[Redacted]	13530793	[Redacted]	Create new
[Redacted]	13530794	[Redacted]	Create new
[Redacted]	13530795	[Redacted]	Create new
[Redacted]	13530796	[Redacted]	Create new

### Adding unit grades

The claim will show all the units that are available for the qualification selected or all the units that the candidate is entered for.

**Note:** Where a previous claim, has been made for a candidate, if you made full award entries, those units will be 'greyed out'. If you made unit entries, previously claimed units will not appear in the list.

To add a unit grade, select the centre assessor from the dropdown list and then click the radio button in the 'P' (Pass), 'M' (Merit) or 'D' (Distinction) column for each unit you wish to claim for that candidate.

Repeat this process for each candidate, making sure you click on 'Save claim' each time.

**Note:** You can add the grades for some or all of the units required to achieve the full qualification. If you only add some grades at this stage, before submitting the claim, you can return to the claim and continue to add the remaining grades to the claim as they are achieved.

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Add unit grade



**Make claim - Claim**  
05325: OCR Level 2 Cambridge Technical Diploma in Business

View centre assessors > Change to another qualification ⓘ

**Details**

Candidate name  
Candidate number  
OCR assessor

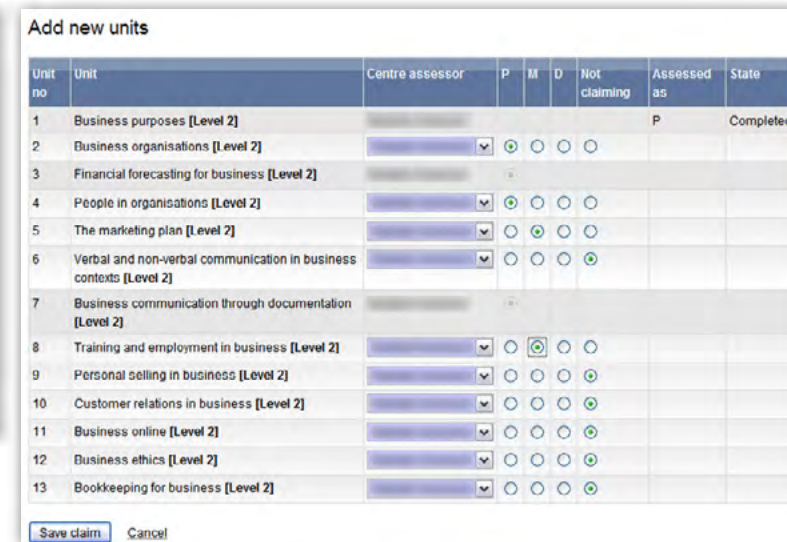
**Add units from another awarding body**

**Add new units**

Unit no	Unit	Centre assessor	P	M	D	Not claiming	Assessed as	State
1	Business purposes [Level 2]						P	Completed
2	Business organisations [Level 2]							
3	Financial forecasting for business [Level 2]							
4	People in organisations [Level 2]							
5	The marketing plan [Level 2]							
6	Verbal and non-verbal communication in business contexts [Level 2]							
7	Business communication through documentation [Level 2]							
8	Training and employment in business [Level 2]							
9	Personal selling in business [Level 2]							
10	Customer relations in business [Level 2]							
11	Business online [Level 2]							
12	Business ethics [Level 2]							
13	Bookkeeping for business [Level 2]							

Adding units from another awarding body is covered on [Page 10](#)

Add new units



**Add new units**

Unit no	Unit	Centre assessor	P	M	D	Not claiming	Assessed as	State
1	Business purposes [Level 2]						P	Completed
2	Business organisations [Level 2]							
3	Financial forecasting for business [Level 2]							
4	People in organisations [Level 2]							
5	The marketing plan [Level 2]							
6	Verbal and non-verbal communication in business contexts [Level 2]							
7	Business communication through documentation [Level 2]							
8	Training and employment in business [Level 2]							
9	Personal selling in business [Level 2]							
10	Customer relations in business [Level 2]							
11	Business online [Level 2]							
12	Business ethics [Level 2]							
13	Bookkeeping for business [Level 2]							

Save claim Cancel

**Note:** The radio buttons automatically default to 'Not claiming' until you enter the candidates' grade.



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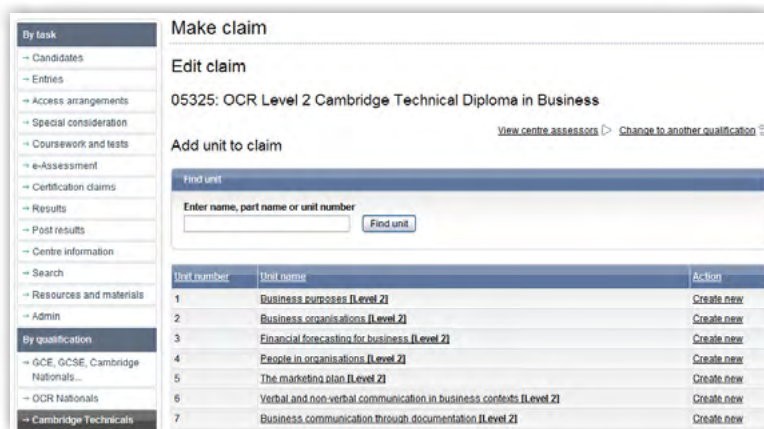
## Claiming by unit

### Selecting units

When you click on 'Create' and then 'By Unit' next to a qualification title, you will see a list of all eligible units.

To begin building a claim by unit, click on 'Create new' next to the unit title.

*Select a unit*



The screenshot shows the 'Make claim' interface. On the left is a navigation menu with options like 'Candidates', 'Entries', 'Access arrangements', etc. The main content area shows the qualification '05325: OCR Level 2 Cambridge Technical Diploma in Business'. Below this is a section 'Add unit to claim' with a search box 'Find unit' and a table of units.

Unit number	Unit name	Action
1	Business purposes (Level 2)	Create new
2	Business organisations (Level 2)	Create new
3	Financial forecasting for business (Level 2)	Create new
4	People in organisations (Level 2)	Create new
5	The marketing plan (Level 2)	Create new
6	Verbal and non-verbal communication in business contexts (Level 2)	Create new
7	Business communication through documentation (Level 2)	Create new

**Note:** Once you have started to build a claim and have saved it, the action will change to 'Edit'.

### Adding candidates to a claim

On the next page you will see a list of all candidates with entries for this unit. This includes candidates with unit and full award entries.

To add a grade for a candidate, click the radio button in the 'P' (Pass), 'M' (Merit), or 'D' (Distinction) column for each candidate you wish to claim for. Select the centre assessor for each candidate (you can select different assessors for different candidates), making sure you click on 'Save claim' each time. Repeat this process for each unit you'd like to make a claim for.















When selecting grades and/or centre assessors, you will see the 'Apply to all' option message appear. This allows you to apply the grade/centre assessor selection to all candidates that appear below your currently selected candidate on the page. **This will not apply the change to any candidates above your selection or, if applicable, to any candidates appearing on another page.**

**Note:** Where a previous claim has been made for a candidate, if you made full award entries, those units will be 'greyed out'. If you made unit entries, previously claimed units will not appear.

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Add a candidate

**Make claim - Claim**

**Details**

Qualification: 05325 OCR Level 2 Cambridge Technical Diploma in Business  
 Unit name: People in organisations  
 Unit no: 4  
 OCR assessor: [redacted]

**Related actions**

- Change to another qualification
- View centre assessors

Find candidate: [dropdown]

**Add new candidates**

OCR cand. no.	Candidate name	Centre assessor	Grade	Assessed as	State
13530790	[redacted]	[redacted]	P		
13530792	[redacted]	[redacted]	<input type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		<a href="#">Apply to all</a>
13530793	[redacted]	[redacted]	<input type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		
13530794	[redacted]	[redacted]	<input type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		
13530795	[redacted]	[redacted]	<input type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		

[Save claim](#) [Cancel](#)

Select and apply grades to all candidates

**Make claim - Claim**

**Details**

Qualification: 05325 OCR Level 2 Cambridge Technical Diploma in Business  
 Unit name: People in organisations  
 Unit no: 4  
 OCR assessor: [redacted]

**Related actions**

- Change to another qualification
- View centre assessors

Find candidate: [dropdown]

**Add new candidates**

OCR cand. no.	Candidate name	Centre assessor	Grade	Assessed as	State
13530790	[redacted]	[redacted]	P		
13530792	[redacted]	[redacted]	<input checked="" type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		
13530793	[redacted]	[redacted]	<input checked="" type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		
13530794	[redacted]	[redacted]	<input checked="" type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		
13530795	[redacted]	[redacted]	<input checked="" type="radio"/> P <input type="radio"/> M <input type="radio"/> D <input type="radio"/> Not Claiming		

[Save claim](#) [Cancel](#)



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## Adding units achieved with another awarding body

For some qualifications, it is possible to use units achieved with another awarding body to contribute to an OCR award.

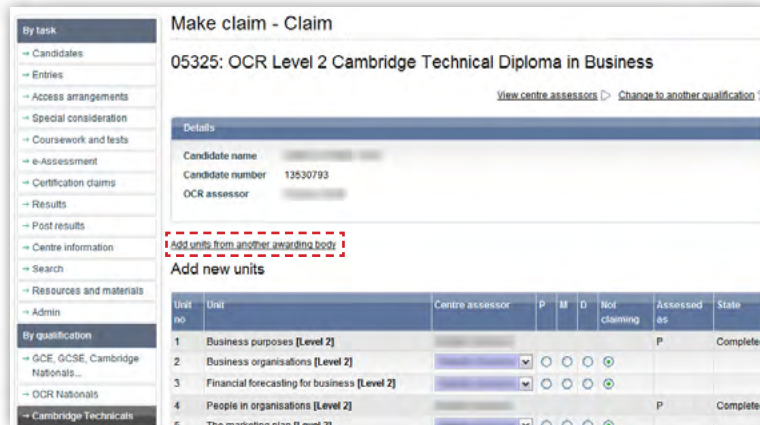
Click on 'Add units from another awarding body', select the unit and centre assessor then enter the name of the awarding body and click on 'Add'.

Enter the grade for each unit P, M, D and click on 'Save claim'.

When you have finished adding units, click on 'Done' to return to the claims page.

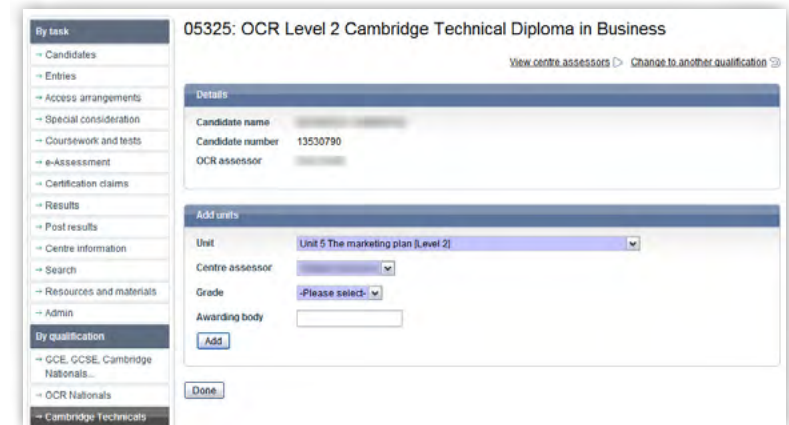
**Note:** Evidence of the achievement, for example, a copy of the certificate or results slip, must be given or sent to your OCR Assessor.

### Adding units achieved with another awarding body

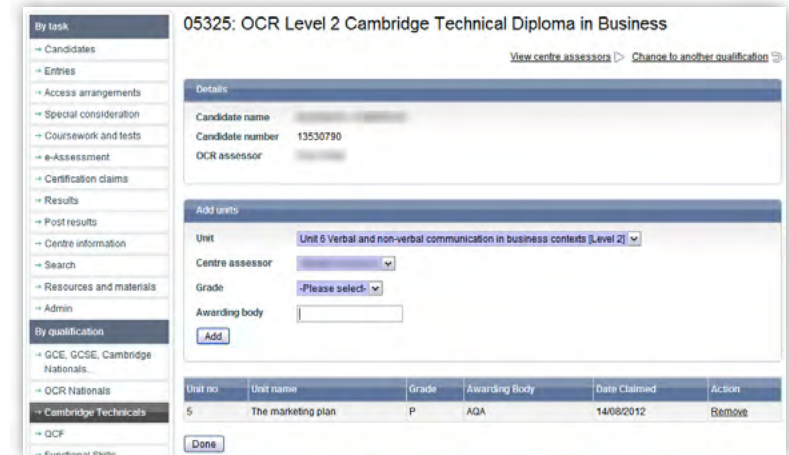


Unit no	Unit	Centre assessor	P	M	D	Not claiming	Assessed	State
1	Business purposes [Level 2]						P	Completed
2	Business organisations [Level 2]							
3	Financial forecasting for business [Level 2]							
4	People in organisations [Level 2]						P	Completed
5	The marketing plan, B level 21							

Select centre assessor, awarding body and grade



### Units from another awarding



Unit no	Unit name	Grade	Awarding Body	Date Claimed	Action
5	The marketing plan	P	ADA	14/08/2012	Remove



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## Editing the claim

You can go back later to amend or add to a claim before submitting it. You can access the claim by hovering over 'Certification claims' in the left-hand menu and clicking on 'Make Cambridge Technicals claims'. Search for the qualification, click on 'Edit' next to the claim then select either 'By Unit' or 'By Candidate' to view the claim.

Next, click on a candidate name to edit their claim. **Make sure you save the claim whenever you make any changes.** If you cancel or do not save a specific candidate claim, all the details you have entered will be removed.

**Note:** You can only make changes before submitting the claim.

## Removing a unit from the claim

If you'd like to remove a unit from the claim, find the claim and then click on 'Edit' and 'By Unit'. Next, select the unit from the list that you'd like to remove from the claim. Select the 'Not claiming' radio button for the first candidates in the list, then click the 'Apply to all' option to remove all candidate from this unit. Remember to click on 'Save claim' to remove this unit from the claim.

*Remove a unit from the claim*

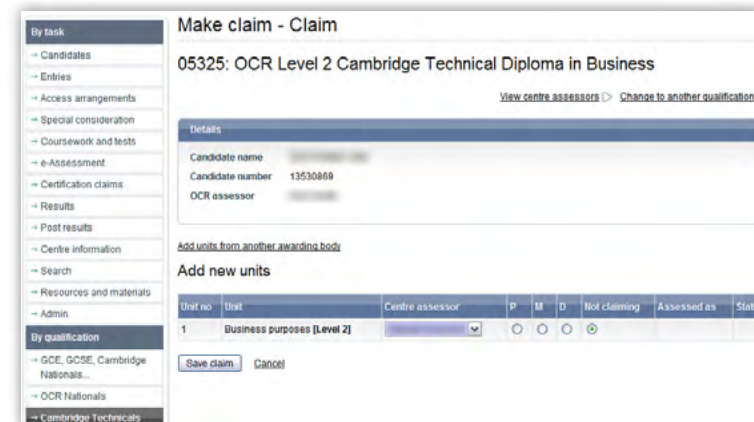
Unit no	Unit	Centre assessor	P	M	D	Not claiming	Assessed as	State
1	Business purposes [Level 2]						P	Completed
2	Business organisations [Level 2]						P	Completed
3	Financial forecasting for business [Level 2]							
4	People in organisations [Level 2]							
5	The marketing plan [Level 2]							Another AB
6	Verbal and non-verbal communication in business contexts [Level 2]					<input type="radio"/>		
7	Business communication through documentation [Level 2]					<input type="radio"/>		
8	Training and employment in business [Level 2]					<input type="radio"/>		
9	Personal selling in business [Level 2]					<input type="radio"/>		
10	Customer relations in business [Level 2]					<input type="radio"/>		
11	Business online [Level 2]					<input type="radio"/>		
12	Business ethics [Level 2]					<input type="radio"/>		
13	Bookkeeping for business [Level 2]					<input type="radio"/>		

## Removing a candidate from the claim

If you'd like to remove a candidate from the claim, find the claim by hovering over 'View claim history' in the left-hand menu under Cambridge Technicals. Click on 'Edit' and 'By Candidate'. Next, select the candidate you'd like to remove from the claim by clicking on the candidate's name.

Click on the radio button in the 'Not claiming' column for all units and click on 'Save claim'.

*Remove a candidate from the claim*



The screenshot shows the 'Make claim - Claim' interface for '05325: OCR Level 2 Cambridge Technical Diploma in Business'. It includes a sidebar menu, a 'Details' section with candidate information, and a table for 'Add new units'. The table has columns for 'Unit no', 'Unit', 'Centre assessor', 'P', 'M', 'D', 'Not claiming', 'Assessed as', and 'State'. The 'Not claiming' column contains radio buttons for each unit.

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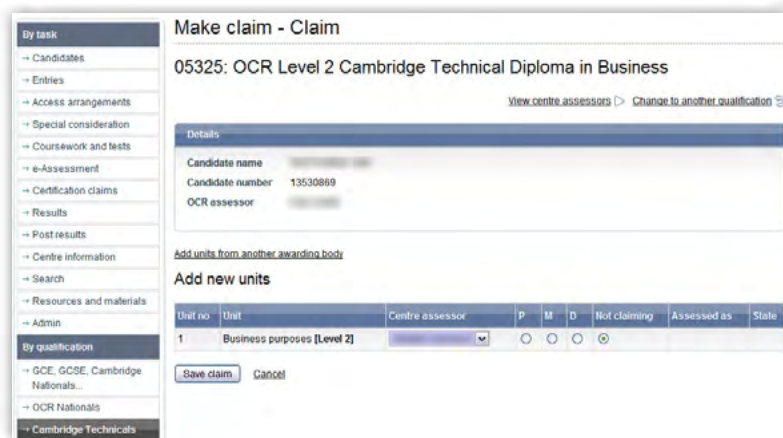
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## Removing a unit from a candidate's claim

If you'd like to remove a unit from a particular candidate's claim, find the claim by hovering over 'View claim history' in the left-hand menu under Cambridge Technicals. Click on 'Edit' and 'By Candidate'. Next, select the candidate you'd like to remove a unit for by clicking on the candidate's name. Click on the radio button in the 'Not claiming' column for the relevant unit you'd like to remove and click on 'Save claim'.

**Note:** Click on the 'Not claiming' radio button before saving the claim will remove the unit for **that candidate only**. If you want to remove a unit for **multiple candidates**, you can follow the process 'Removing a unit from the claim'.

*Remove a unit for a candidate*



The screenshot shows the 'Make claim - Claim' interface for '05325: OCR Level 2 Cambridge Technical Diploma in Business'. It includes a 'Details' section with candidate information and an 'Add new units' table. The table has columns for 'Unit no.', 'Unit', 'Centre assessor', 'P', 'M', 'D', 'Not claiming', 'Assessed as', and 'State'. The 'Not claiming' column for 'Business purposes [Level 2]' has a radio button selected.

Unit no.	Unit	Centre assessor	P	M	D	Not claiming	Assessed as	State
1	Business purposes [Level 2]		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		

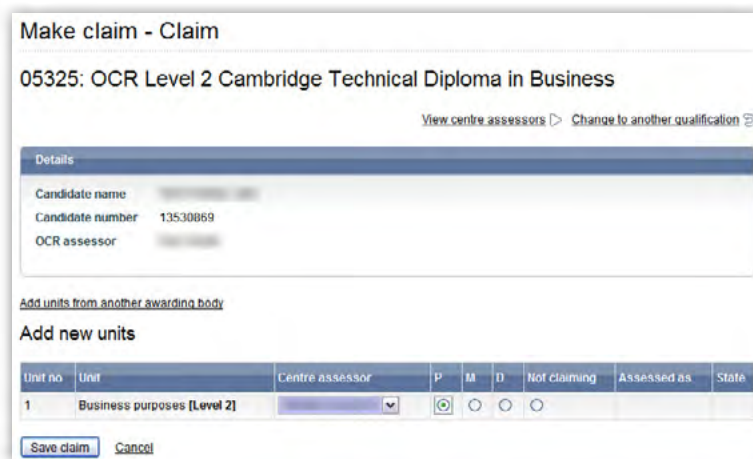


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## Submitting a claim

When you have included all the relevant candidate achievements, you can submit a claim from the 'View claim history' option on the claim.

Click 'View claim history'



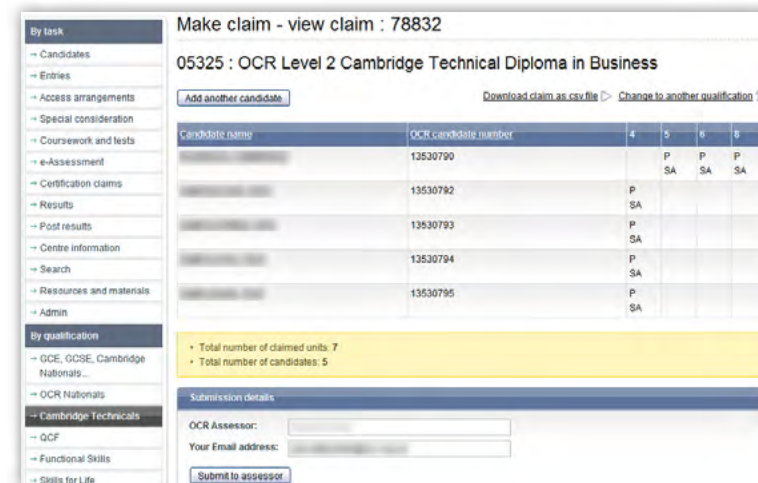
It is good practice to enter the data for each qualification, save the claim (without submitting) and then print it so that it can be **checked and amended** before submitting. Before you submit the claim, you can also export it as a CSV file for your records.

Please also check that the **email address** shown for you is correct. You can edit it here but it will not change your Interchange profile. If your address has permanently changed, ask your Centre Administrator to update your profile.

**Note:** Use a generic **email address**, in case you're not available eg exams@school.co.uk or sciencedept@centre.org

**Note:** It is important that you check your claim carefully before you submit, as you will not be able to amend any of the contents once it has been submitted

Check claim details



Candidate name	OCR candidate number	4	5	6	7
[Redacted]	13530790	P	P	P	P
[Redacted]	13530782		SA		
[Redacted]	13530793		SA		
[Redacted]	13530794		SA		
[Redacted]	13530795		SA		

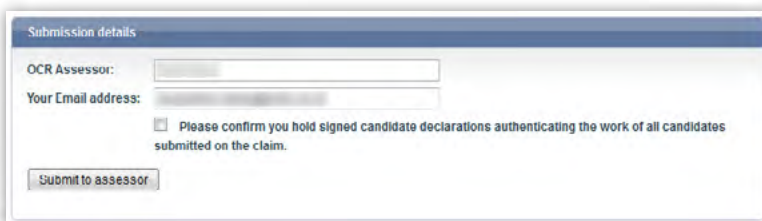


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## Centre declaration

**Note:** You must obtain signed candidate declarations authenticating the work of all the candidates submitted on the claim which is to be held in the Centre.

### Centre declaration



The Submit to assessor button is disabled until the centre declaration tick box is completed.

When this is submitted by the centre, an email is sent to the OCR Assessor advising them that the centre has made a claim. The OCR Assessor now has to select a sample, before visiting the centre to moderate the work.

The Candidate authentication statement is available on the OCR website:

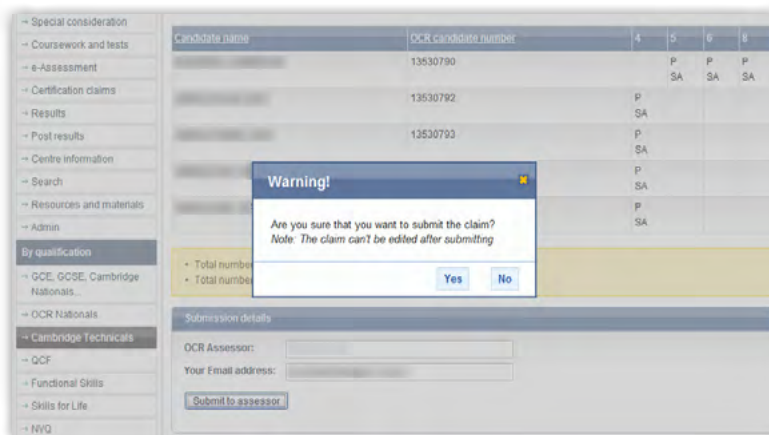


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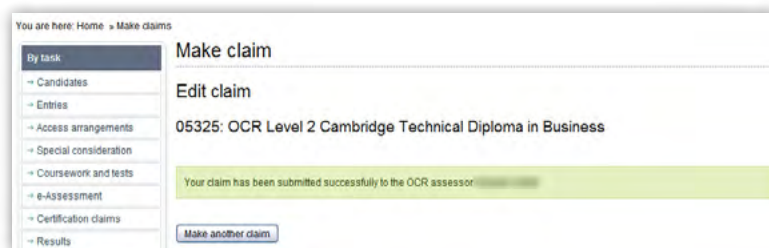
When you click on 'Submit to assessor', a warning message will appear prompting you to confirm that you want to submit the claim. Only click 'yes' if you are ready as, after this point, you will not be able to edit it.

#### Confirm claim



Candidate name	OCR candidate number	A	S	G	S
	13530790		P	P	P
			SA	SA	SA
	13530792		P		
			SA		
	13530793		P		
			SA		
			P		
			SA		
			P		
			SA		

#### Claim confirmation screen



You are here: Home > Make claims

**Make claim**

By task















- Candidates
- Entries
- Access arrangements
- Special consideration
- Coursework and tests
- e-Assessment
- Certification claims
- Results

**Edit claim**

05325: OCR Level 2 Cambridge Technical Diploma in Business

Your claim has been submitted successfully to the OCR assessor [redacted]

[Make another claim](#)

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## Sampling

### Receiving the sample notification

Once the claims have been submitted via Interchange, your OCR Assessor will receive an email telling them your claim is ready for sampling. They will then log in to Interchange and select a sample from the claim.

When they have selected the sample, you will receive an email from Interchange telling you the sample is ready to view.

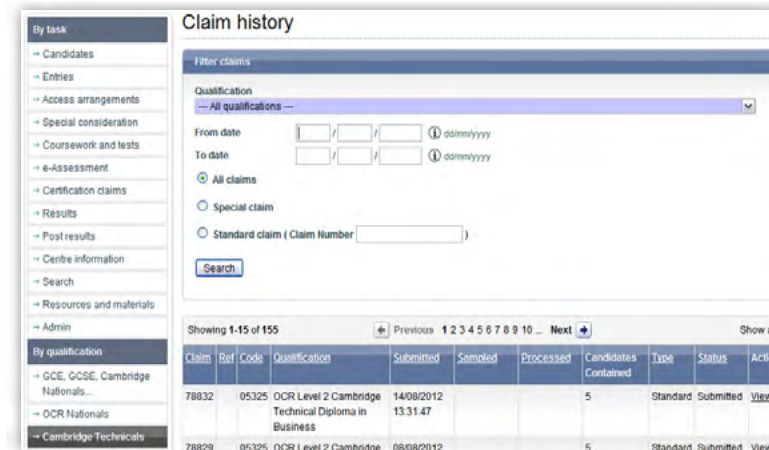
**Note:** This email will be sent to the email address you supplied when submitting the claim.

### Viewing the sample

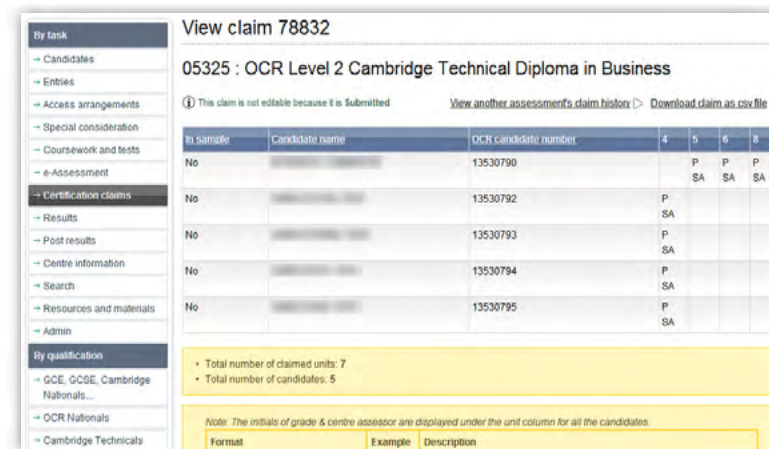
To view the selected sample, hover over 'Certification claims' in the left-hand menu and click on 'View claim history' under the 'Cambridge Technicals claims' heading. Click on 'View' next to the claim that has been sampled (indicated by the 'Sampled' message in the Status column).

All the units/candidates that the OCR Assessor wishes to sample are indicated with a green tick. You must ensure that this work is available at the moderation visit.

View the sample



Claim	Ref	Code	Qualification	Submitted	Sampled	Processed	Candidates Contained	Type	Status	Action
78832		05325	OCR Level 2 Cambridge Technical Diploma in Business	14/08/2012 13:31:47			5	Standard	Submitted	View
78829		05325	OCR Level 2 Cambridge	08/08/2012			5	Standard	Submitted	View



**05325 : OCR Level 2 Cambridge Technical Diploma in Business**

*This claim is not editable because it is Submitted. View another assessment's claim history > Download claim as csv file >*

In sample	Candidate name	OCR candidate number	4	5	6	8
No	[REDACTED]	13530790		P	P	P
No	[REDACTED]	13530792		SA	SA	SA
No	[REDACTED]	13530793		P		
No	[REDACTED]	13530794		SA		
No	[REDACTED]	13530795		P		
				SA		

• Total number of claimed units: 7  
• Total number of candidates: 5

*Note: The initials of grade & centre assessor are displayed under the unit column for all the candidates.*

Format	Example	Description



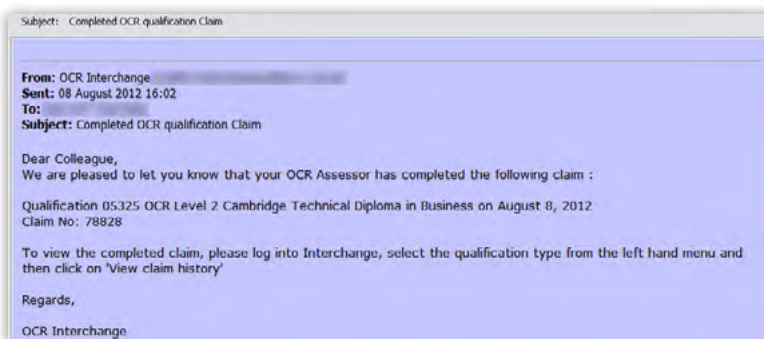


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## After the moderation visit

After the moderation visit, the OCR Assessor will submit the claims as agreed with you at the visit. You will then receive an email from Interchange, confirming that the claim has been completed.

### *Email notification*



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## Checking the progress of a claim

You can see the claim you are making at each stage of the process as well as after certification.

To view the claim status, hover over 'Cambridge Technicals' in the left-hand menu and then click on 'View claim history'.

**Note:** Your most recent claim should be at the top of the list. You can also filter by qualification and order the columns alphabetically by clicking on the column headings.

**Note:** You can check the whole claim or export the claim for your own records. The claim will stay available on Interchange for 12 months.

At each stage of the process, the claim will show a different status:

Status	Comments
No claims submitted	No claim has yet been generated for this qualification.
Unsubmitted	The claim is currently being generated and can still be edited.
Submitted	The claim has been submitted to your Assessor and can no longer be edited.
Sampled	The claim will indicate the sample the Assessor has selected.
Finalised	The claim has been revised/confirmed by the Assessor. This will only appear for a short time; however, if all units within a claim have been withdrawn, the claim will remain in this stage.
Processed	The claim has been sent to OCR and results should appear on Interchange in approximately 48 hours
Withdrawn	The OCR Assessor has withdrawn the whole claim

**Note:** The claim number is generated when you submit the claim. The reference is generated once the OCR Assessor has submitted the claim to OCR.

If your claim includes a lot of different units, we recommend the following:

**16 – 30 different units claimed** – Set your printer to landscape to ensure your printed version matches the screen.

**30+ units** – Export your claim, as all units claimed may not show on the printed version.





# Interchange **Step-by-step** guide

## Cambridge Technicals Claims

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### Further support

#### **OCR Customer Contact Centre**

02476 851509

[vocational.qualifications@ocr.org.uk](mailto:vocational.qualifications@ocr.org.uk)

Please quote your centre number, entry code and claim number in all communications.

