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Making entries for vocational qualifications via Interchange

A step-by-step guide for centres



Welcome to Interchange

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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>

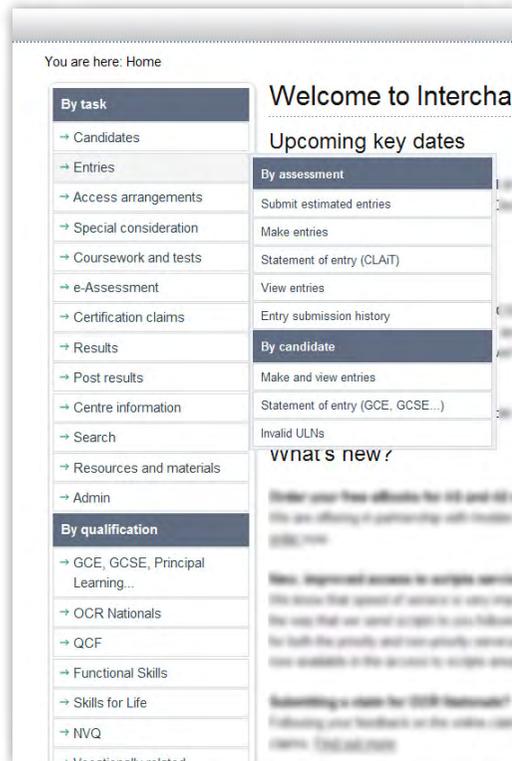
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Log in to Interchange

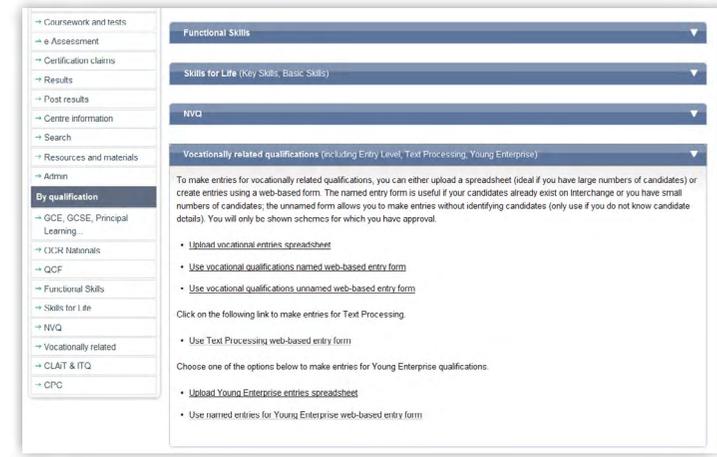
To get started, log in to Interchange, hover over 'Entries' in the left-hand menu and then click on 'Make entries'. Next, click on 'Vocationally related qualifications'. You then need to choose your entry method, depending on whether you're making **named** or **unnamed** entries.

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

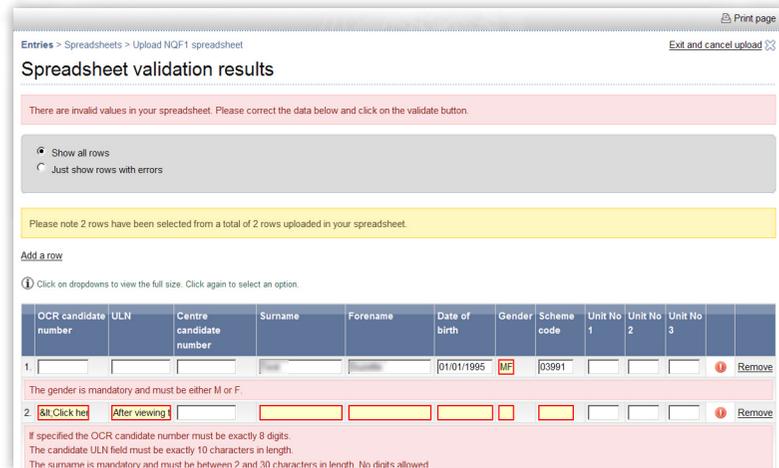
Once you've clicked 'Submit entries spreadsheet', Interchange will automatically validate the information. Any errors will show up in red. You will need to correct these before your entries can be processed. If necessary, make the amendments to your entry information and then click on 'Submit'.

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.

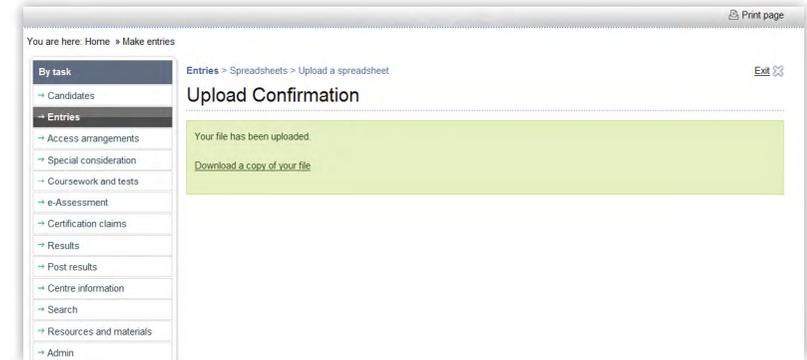
Add a row

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

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 a web interface for 'Make OCR Nationals claim'. It includes a sidebar menu 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 a 'Find candidate' search box and a table of existing candidates.

Candidate name	OCR candidate number	Date of birth	Action
...	13520736	...	Create new
...	13520737	...	Create new
...	13520738	...	Create new
...	13520739	...	Create new
...	13520740	...	Create new
...	13520741	...	Create new
...	13520742	...	Create new
...	13520743	...	Create new
...	13520744	...	Create new
...	13520745	...	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'.

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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"/>		Mr John Smith	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>		Mr John Smith	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>		Mr John Smith	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

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<input type="checkbox"/>	Cand. no.	Name	Date of birth	Entry details	
<input type="checkbox"/>		Mr John Smith	01/01/1980	Full award	Remove
<input type="checkbox"/>		Mr John Smith	01/01/1980	Full award	Remove
<input type="checkbox"/>		Mr John Smith	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

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

Candidates entries (3)

Please review and submit the entries to complete

Cand No.	Name	UCI	ULN	Date of birth	Entry details	
	Mr John Smith			01/01/1980	Full award	Remove
	Mr John Smith			01/01/1980	Full award	Remove
	Mr John Smith			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: Standard vocational entries for the same candidates

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

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
	Ms Jane Doe			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

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?
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

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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

Entry submission history (search results)

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

View entry details

Cand. no.	Name	UCI	ULN	Date of birth	Option	Actions
				01/01/1995	Full entry	

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Further support

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