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Making entries for Essential Skills Wales (ESW) via Interchange

A step-by-step guide for centres



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Introduction

This guidance demonstrates how to make entries for Essential Skills Wales (ESW) via Interchange.

Interchange

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

Interchange quick start guide

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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.

Note: Do not click on the 'Skills for Life (Key Skills, Basic Skills)' category and do not use the Key Skills entry form.

Choose your entry method

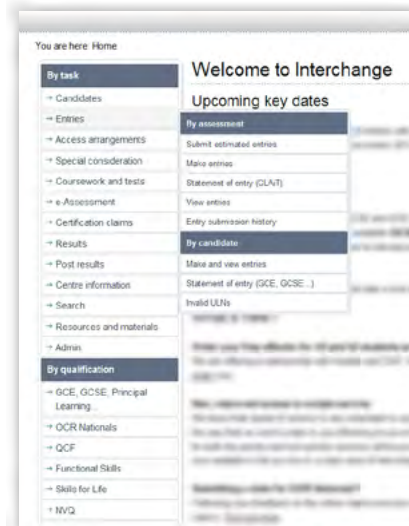
Entry Level

- Spreadsheet
- Named web-based form
- Unnamed web-based form

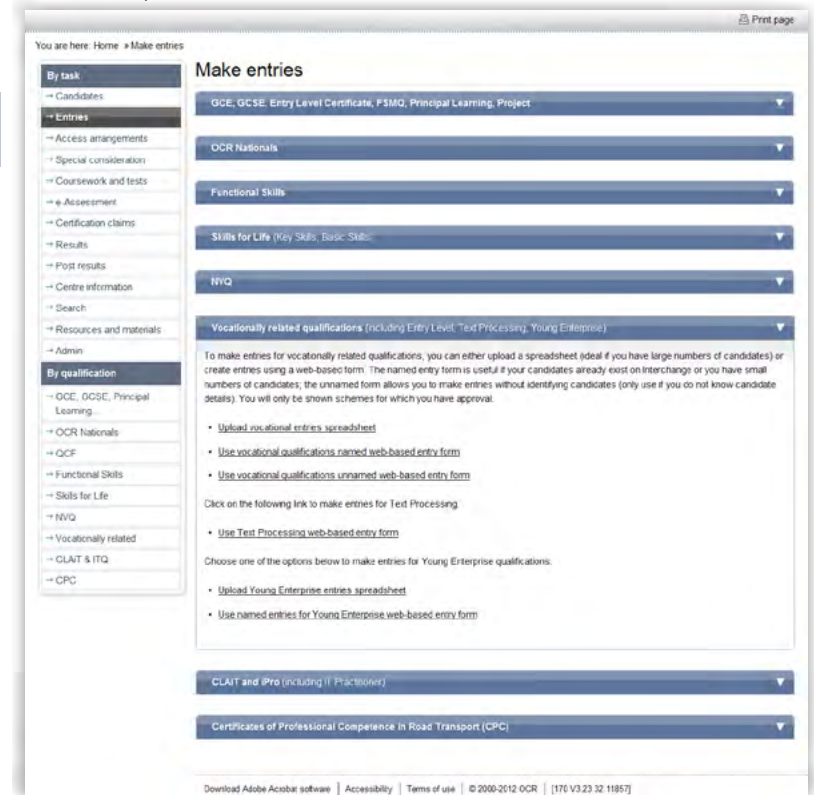
Levels 1–3

- Spreadsheet
- Named web-based form

Choose 'Entries' from the left-hand menu



Choose entry method



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Uploading a spreadsheet

This is an ideal way of submitting entries if you have large numbers of candidates.

This method can be used for both **Entry Level and Levels 1–3** ESW qualifications.

Download and complete the entries spreadsheet

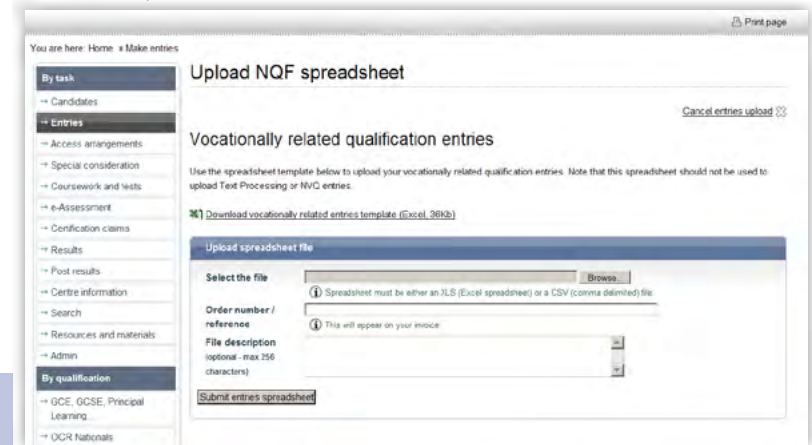
Click on 'Upload vocational entries spreadsheet' and then download and save the spreadsheet template. Complete the spreadsheet – either manually or by importing data from your management information system.

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).

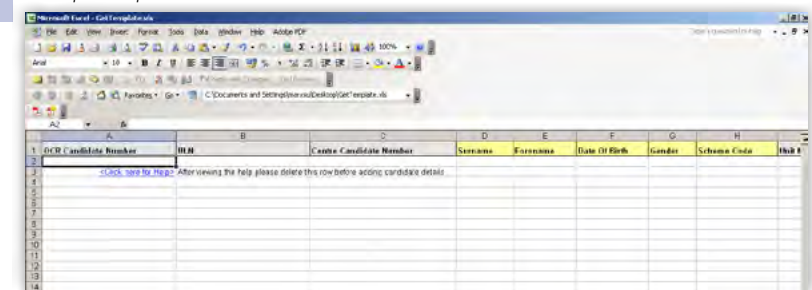
Remember that some of the fields are mandatory (shown in yellow).

When you have completed the spreadsheet and are ready to make your entries, 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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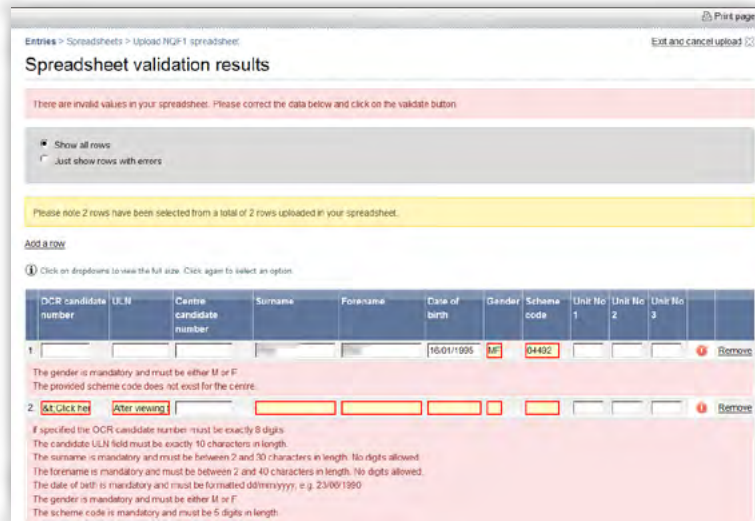
Spreadsheet validation

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.

Spreadsheet validation



Entries > Spreadsheets > Upload NCF 1 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.

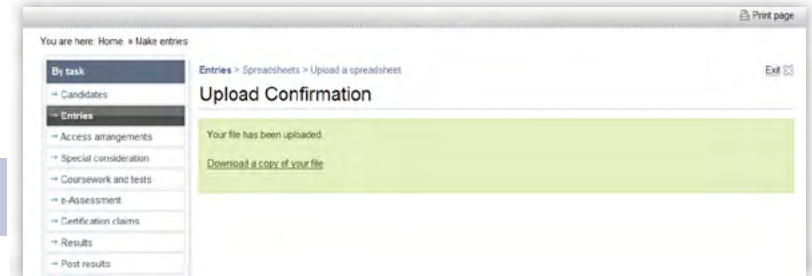
DCR candidate number	UELN	Centre candidate number	Surname	Forename	Date of birth	Gender	Schema code	Unit No 1	Unit No 2	Unit No 3	
1					16/01/1995	M	04402				Remove
2							04402				Remove

The gender is mandatory and must be either M or F.
The provided schema code does not exist for the centre.

Click here | [Alter viewing](#)

If specified the OCR candidate number must be exactly 8 digits.
The candidate UELN 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.
The forename is mandatory and must be between 2 and 40 characters in length. No digits allowed.
The date of birth is mandatory and must be formatted dd/mm/yyyy; e.g. 23/09/1980.
The gender is mandatory and must be either M or F.
The schema code is mandatory and must be 5 digits in length.

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

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

For **Entry Level** qualifications, you can submit either named or unnamed entries.

For **Levels 1–3**, you can submit **named entries only**.

Entry Level (named)

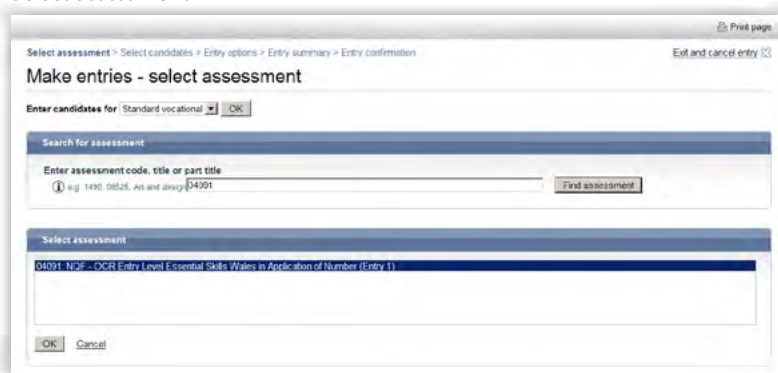
To submit named entries for Entry Level qualifications using the web-based form, click on the 'Use vocational qualifications named web-based form' link.

Select assessment

You will 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



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.

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'.

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(s) 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. The candidate(s) 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'.

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Select candidates



Make entries - select candidates

04091: NQF - OCR Entry Level Essential Skills Wales in Application of Number (Entry 1)

Selected candidates (4)

Cand. no.	Name	Date of birth	Remove
1234	John Smith	01/01/1995	Remove
1235	Jane Doe	01/01/1980	Remove
1236	John Smith	01/01/1980	Remove
1237	Jane Doe	01/01/1980	Remove

Showing 4-15 of 17

Cand. no.	Name	UCI	Date of birth	Remove
1234	John Smith	31200001234X	01/01/1980	Remove
1235	Jane Doe	31200001234X	01/01/1980	Remove
1236	John Smith	31200001234X	01/01/1980	Remove
1237	Jane Doe	31200001234X	01/01/1980	Remove
1238	John Smith	31200001234X	01/01/1980	Remove
1239	Jane Doe	31200001234X	01/01/1980	Remove
1240	John Smith	31200001234X	01/01/1980	Remove
1241	Jane Doe	31200001234X	01/01/1980	Remove
1242	John Smith	31200001234X	01/01/1980	Remove
1243	Jane Doe	31200001234X	01/01/1980	Remove
1244	John Smith	31200001234X	01/01/1980	Remove
1245	Jane Doe	31200001234X	01/01/1980	Remove
1246	John Smith	31200001234X	01/01/1980	Remove
1247	Jane Doe	31200001234X	01/01/1980	Remove
1248	John Smith	31200001234X	01/01/1980	Remove
1249	Jane Doe	31200001234X	01/01/1980	Remove
1250	John Smith	31200001234X	01/01/1980	Remove

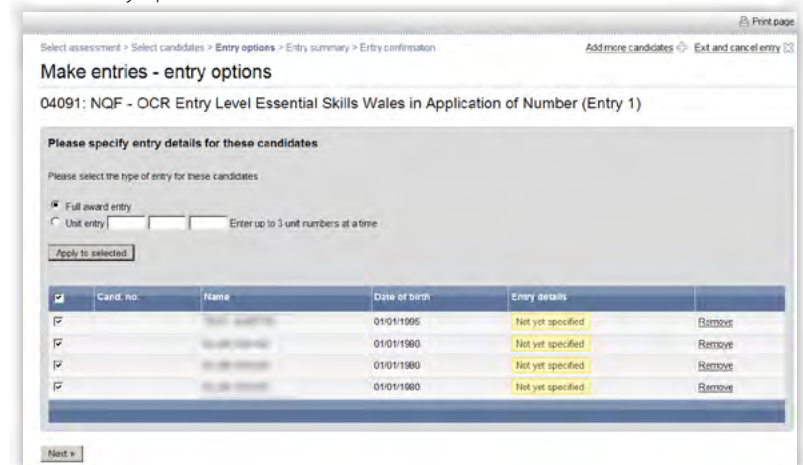
Select entry options

You will then be asked to select your entry options for each candidate.

Note: For all Essential Skills Wales qualifications, it is only possible to submit full award entries – unit entries are not valid.

Select the full award entry option by clicking in the 'Full award entry' radio button. Next, tick the box for all candidates and click on 'Apply to selected'. Once all candidates have been updated, click 'Next'.

Select entry options



Make entries - entry options

04091: NQF - OCR Entry Level Essential Skills Wales in Application of Number (Entry 1)

Please specify entry details for these candidates

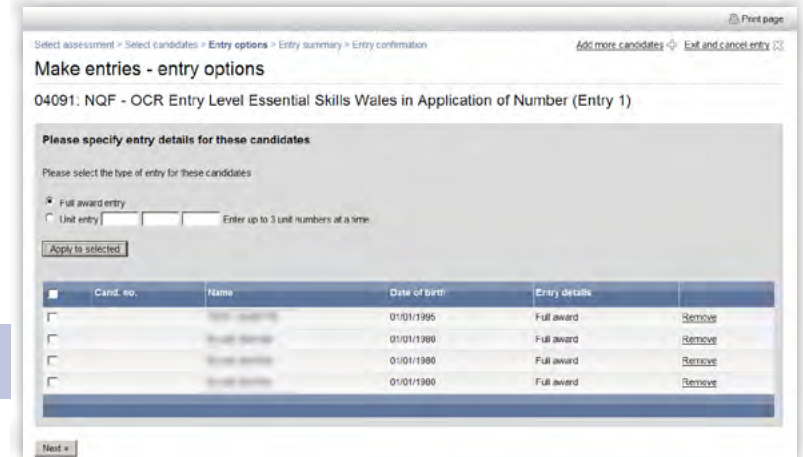
Please select the type of entry for these candidates

Full award entry
 Unit entry

Enter up to 3 unit numbers at a time

Apply to selected

✓	Cand. no.	Name	Date of birth	Entry details	Remove
<input checked="" type="checkbox"/>	1234	John Smith	01/01/1995	Not yet specified	Remove
<input checked="" type="checkbox"/>	1235	Jane Doe	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>	1236	John Smith	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>	1237	Jane Doe	01/01/1980	Not yet specified	Remove



Make entries - entry options

04091: NQF - OCR Entry Level Essential Skills Wales in Application of Number (Entry 1)

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

✓	Cand. no.	Name	Date of birth	Entry details	Remove
<input checked="" type="checkbox"/>	1234	John Smith	01/01/1995	Full award	Remove
<input checked="" type="checkbox"/>	1235	Jane Doe	01/01/1980	Full award	Remove
<input checked="" type="checkbox"/>	1236	John Smith	01/01/1980	Full award	Remove
<input checked="" type="checkbox"/>	1237	Jane Doe	01/01/1980	Full award	Remove

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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. The order number will be quoted on your centre's invoice.

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 ESW entries.

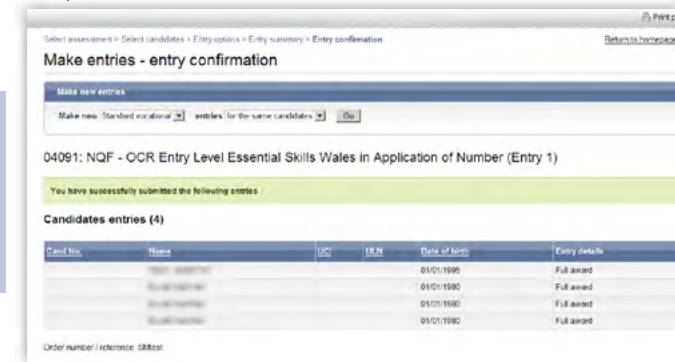
You will then see a confirmation page.

Submit your entries



Cand No.	Name	UCI	UIN	Date of birth	Entry details
1000000001	John Smith			01/01/1995	Full award Remove
1000000002	Jane Doe			01/01/1990	Full award Remove
1000000003	Michael Brown			01/01/1990	Full award Remove
1000000004	Sarah White			01/01/1980	Full award Remove

Entry confirmation



Cand No.	Name	UCI	UIN	Date of birth	Entry details
1000000001	John Smith			01/01/1995	Full award
1000000002	Jane Doe			01/01/1990	Full award
1000000003	Michael Brown			01/01/1990	Full award
1000000004	Sarah White			01/01/1980	Full award

Entry Level (unnamed)

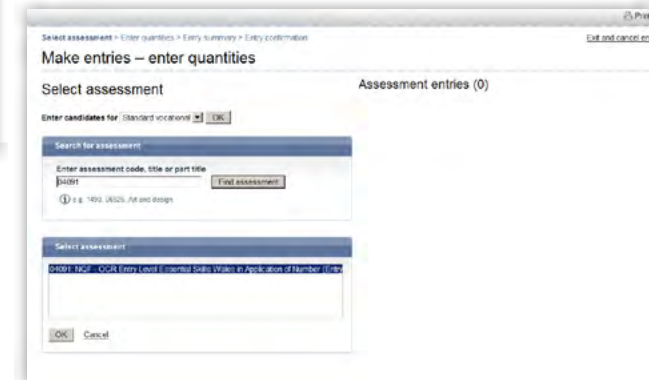
To submit unnamed entries for Entry Level qualifications using the web-based form, click on the 'Use vocational qualifications unnamed web-based form' link.

Select assessment

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



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Select entry quantities

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

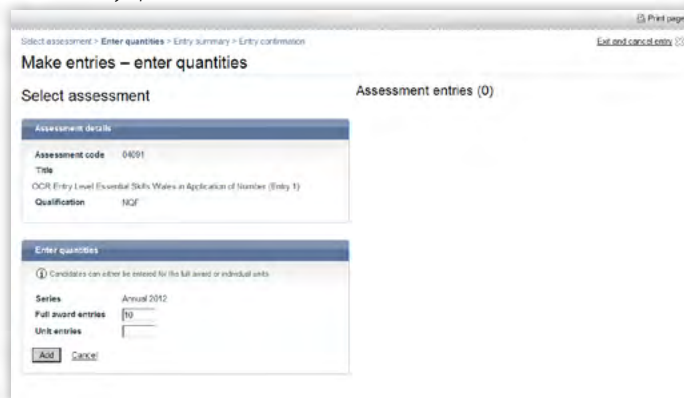
Note: Essential Skills Wales qualifications are single-unit qualifications, so only full award entries are valid.

Enter the number of full award entries you'd like in the relevant box and then click on 'Add'. The entries will appear in the list on the right-hand side of the screen.

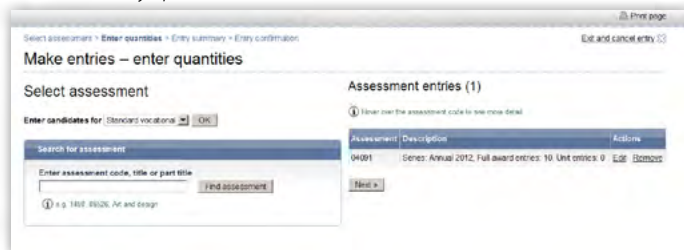
Once you have added all unnamed entries for all assessments, click 'Next'.

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

Select entry quantities



Confirm entry quantities



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 ESW entries.

You will then see a confirmation page.

Submit your entries



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Levels 1–3 (named)

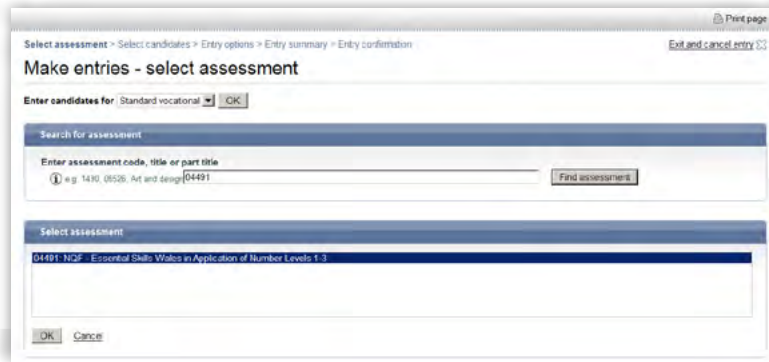
To submit entries for Levels 1–3 using the web-based form, click on the 'Use vocational qualifications named web-based form' link.

Select assessment

You will 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



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.

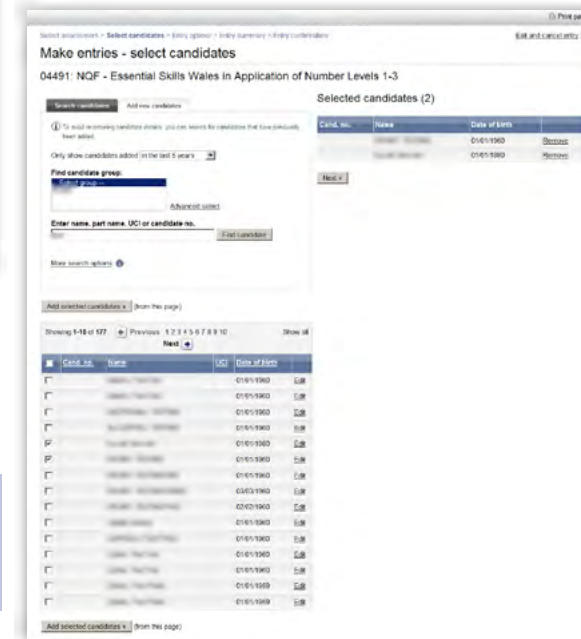
Note: You can create bespoke candidate groups within Interchange, tailored to include candidates of your choice. To create a bespoke candidate group, log in to Interchange, hover over 'Candidates' in the left hand menu and click on 'Candidate groups'.

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(s) 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. The candidate(s) 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'.

Select candidates



Candidate No.	Name	UCI	Date of Birth	Selected
01411900	...	01411900	01/01/1900	<input checked="" type="checkbox"/>
01411900	...	01411900	01/01/1900	<input checked="" type="checkbox"/>

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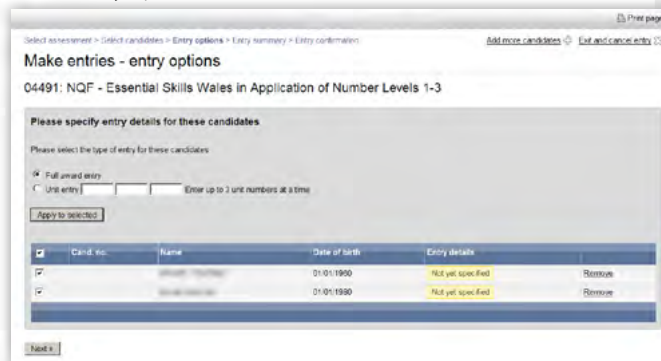
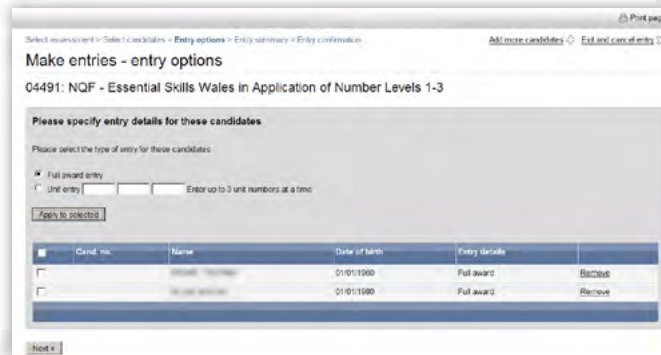
Select entry options

You will then be asked to select your entry options for each candidate.

Note: For all Essential Skills Wales qualifications, it is only possible to submit full award entries – unit entries are not valid.

Select the full award entry option by clicking in the 'Full award entry' radio button. Next, tick the box for all candidates and click on 'Apply to selected'. Once all candidates have been updated, click 'Next'.

Select entry options

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. The order number will be quoted on your centre's invoice.

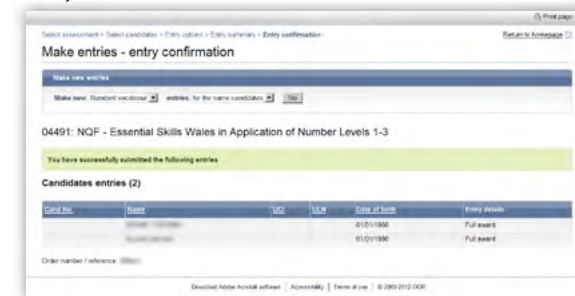
Once you've checked the details, added an order number (if necessary) and you're happy that everything is correct, click on 'Submit entries' to submit your ESW entries.

You will then see a confirmation page.

Submit your entries



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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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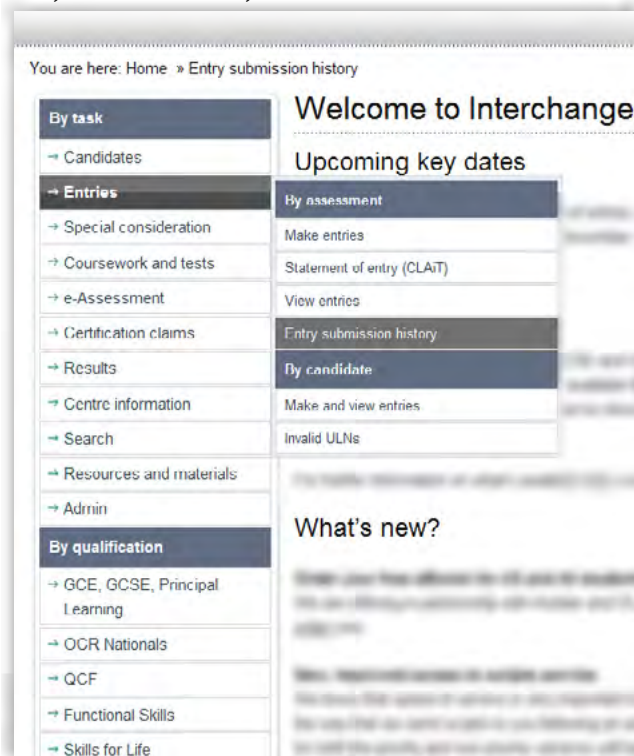
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Unnamed entries

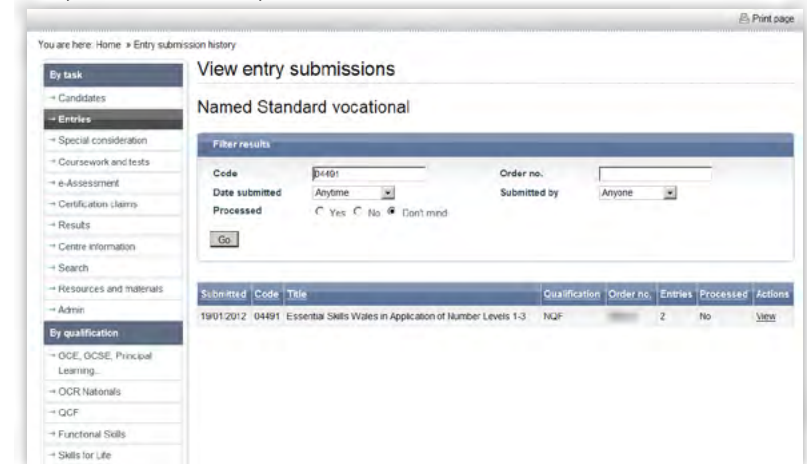
Click on the 'View unnamed vocationally related entry submission history' link. You will then see a list of all unnamed entries, with the most recent at the top of the list. You can filter the results by selecting various search criteria including entry code, submission date, process status, order number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

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

Entry submission history

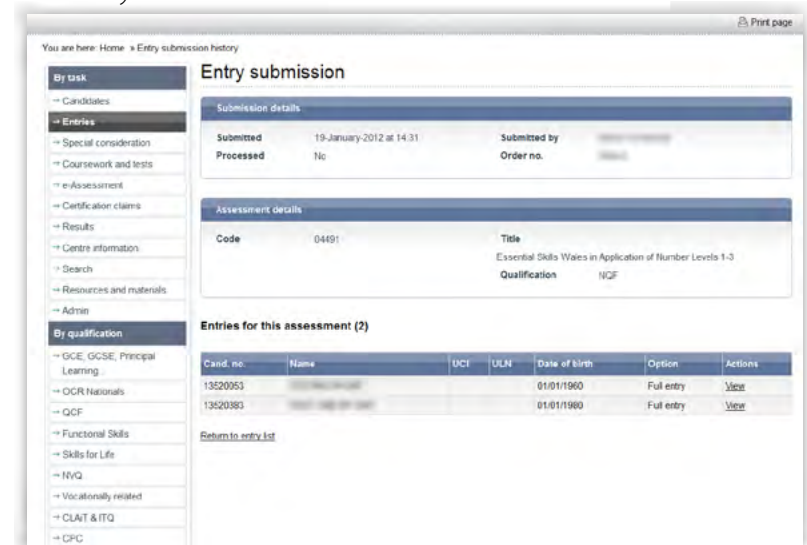


Entry submission history (search results)



Submitted	Code	Title	Qualification	Order no.	Entries	Processed	Actions
19/01/2012	04491	Essential Skills Wales in Application of Number Levels 1-3	NGF		2	No	View

View entry details



Entries for this assessment (2)						
Cand. no.	Name	UCI	ULN	Date of birth	Option	Actions
13520053				01/01/1980	Full entry	View
13520383				01/01/1980	Full entry	View

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OCR Customer Contact Centre

02476 851509

vocational.qualifications@ocr.org.uk