OCR CYMRU

Making online claims for Essential Skills Wales (ESW) via Interchange

A step-by-step guide for centres

Welcome to Intercha

Introduction

This guide explains how to make online claims for Essential Skills Wales (ESW) via Interchange.

Interchange

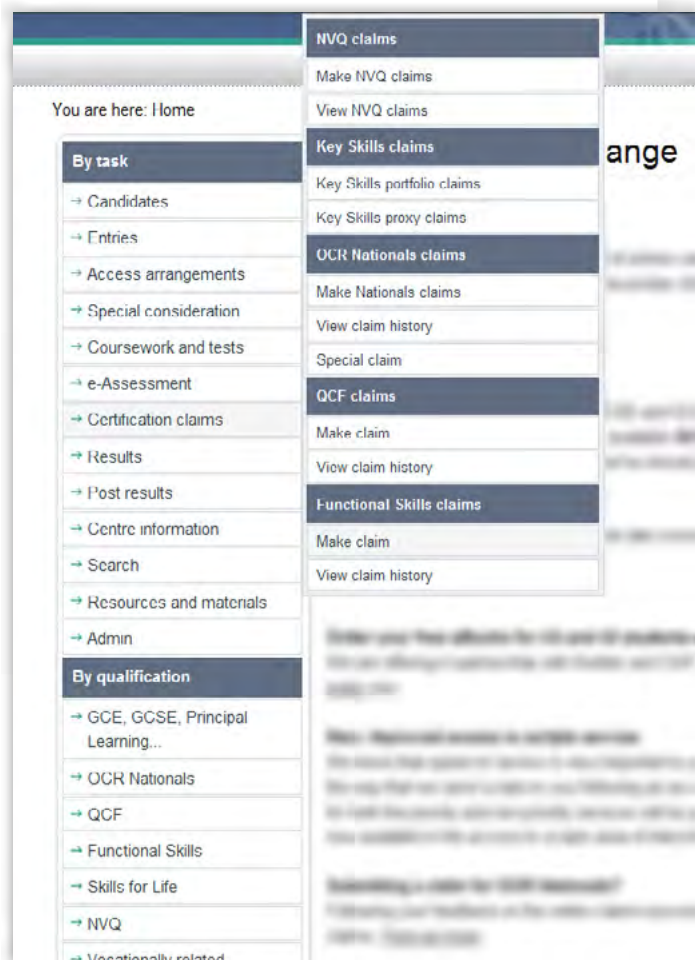For help getting started with Interchange, please see our quick start guide

Interchange quick start guide

Starting your online claim

To get started, log in to Interchange, hover over 'Certification claims' in the left-hand menu and then click on 'Make claim' under the 'Functional Skills claims' heading.

Select 'Certification claims' from the left-hand menu
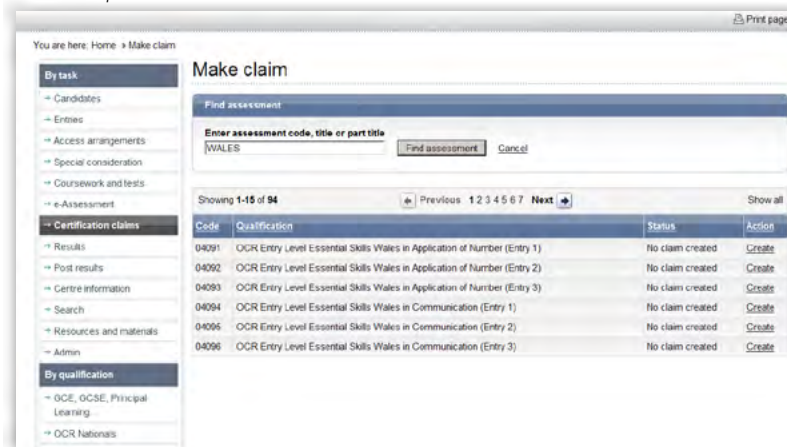
Select a qualification

You will then be able to see a list of all the vocational qualifications for which you have approval and the status of any claims being made.
If you cannot see this area, check with your Interchange Centre Administrator that you have the correct role – you need either the 'Centre Administrator' or 'Tutor/Teacher' role.

Note: A claim can be built over a period of time and can contain multiple candidates. So, to keep your admin to a minimum, try to put as many as possible in a single claim.

If you're approved for a lot of qualifications, you can search for a qualification by entry code, title or part title. Select the qualification from the list by clicking 'Create' next to the qualification title.

Note: Once you've started a claim (but not yet submitted it) 'Create' next to the claim details will change to 'Edit'.

Select a qualification

Adding your assessment personnel

The first time you create a claim for each qualification, you will need to set up your centre assessors.
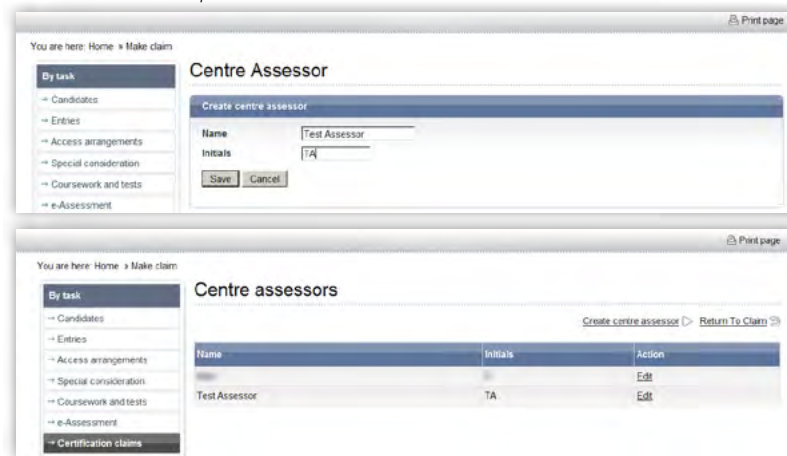
Note: These are the people within your centre who will be marking the assessment.

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.

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.

Select assessment personnel

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Adding candidates

There are two ways to add candidates to a claim, depending on whether you made named or unnamed entries.
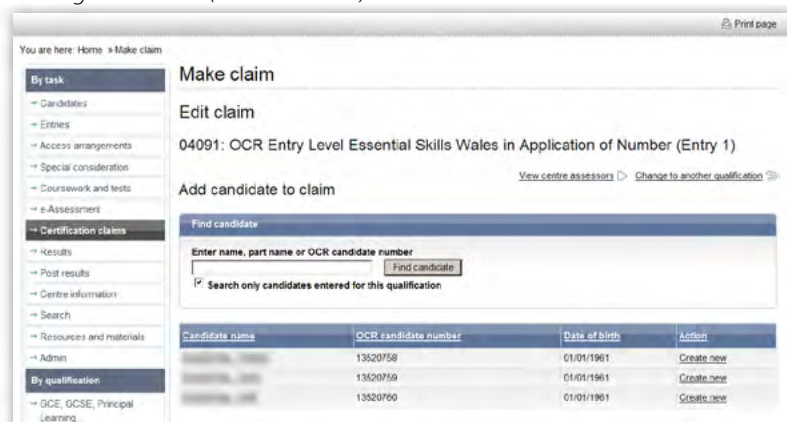
Named entries

If you made named entries, once you click 'Create' next to the 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 the qualification the candidate is entered for.

Note: Once you've started a claim (but not yet submitted it) 'Create new' next to the candidate details will change to 'Edit'.

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

Adding candidates (named entries)

Unnamed entries

If you made unnamed entries, once you click 'Create' next to a qualification title, you will need to build up a list of candidates to add to the claim. You should select existing candidates rather than creating new ones; however, if you cannot find a candidate, you can enter their details.

You will also see how many unnamed entries are available to use towards the claim. Each time you submit a claim, this number will decrease. If this gets low, you may need to make more unnamed entries before you can complete a claim.

To search for the candidate, enter the name, part name or OCR candidate number (remembering to **un-tick** the 'Search only candidates entered for this qualification' box) before clicking on 'Find candidate'. Candidates that match your search criteria will then be displayed.

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

Note: If you can't find a candidate, you will need to enter their details. Click on 'Create a new candidate' and enter their details in upper case. You must provide surname, forename, date of birth and gender. In addition, if you want achievements to be available for a 14–19 Diploma or other lifelong learning, please provide the unique learner number (ULN).
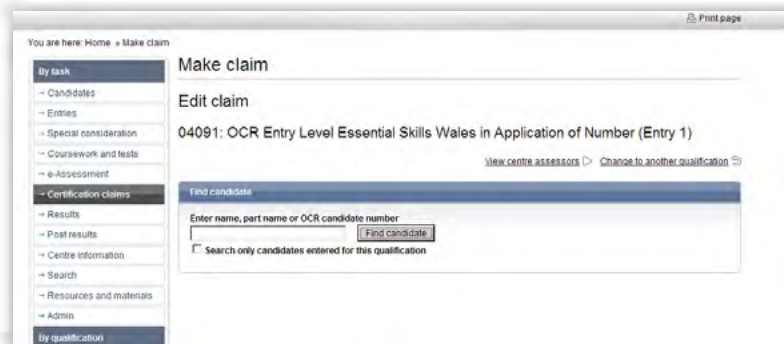
The details you enter here will appear on the candidate's certificate, so please check you have entered these details correctly before continuing with the claim.

To begin building a claim for a candidate, click on 'Create new' next to each candidate's name. You will then see the qualification the candidate is entered for.
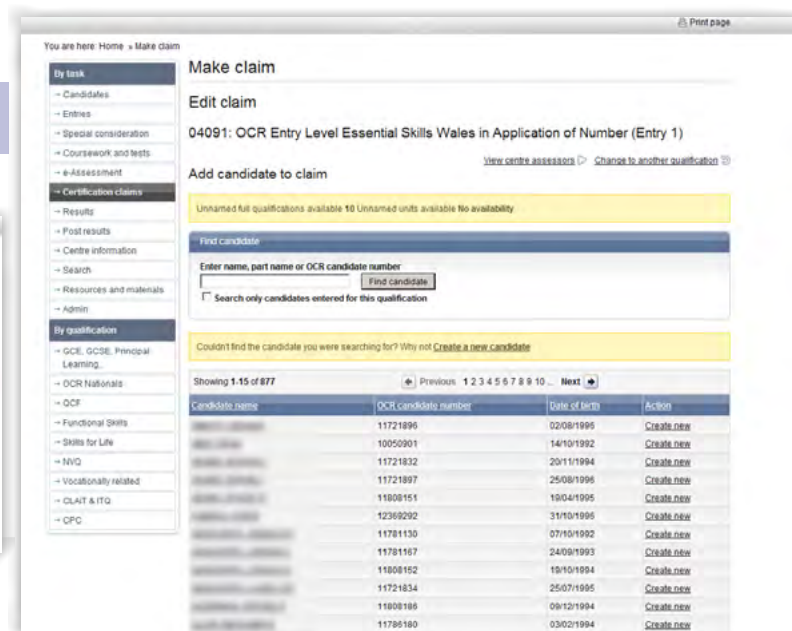
Note: Once you've started a claim (but not yet submitted it) 'Create new' next to the candidate details will change to 'Edit'

Search candidates (unnamed entries)

Adding candidates (unnamed entries)

Adding units

Entry Level Essential Skills Wales qualifications are single-unit qualifications. Therefore, it is only necessary to add one unit, at the level you wish to claim for.
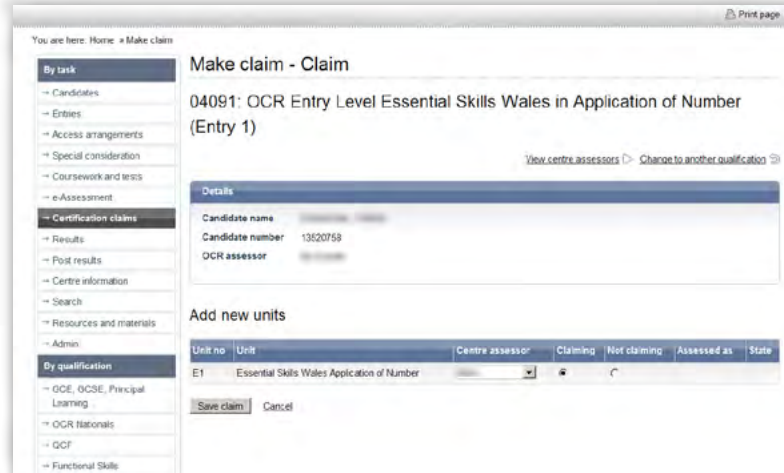
Entry Level

For Entry Level qualifications, you will see only one unit here. To add the unit, select the centre assessor from the dropdown list and click the radio button in the 'Claiming' column. To save these changes, click 'Save claim'.

Note: If you made **unnamed entries**, every unit you submit in the claim will decrease the total number of available unnamed unit purchases. If this gets low, you may need to make more unnamed entries before you can complete the claim.

Repeat this process for each candidate you'd like to add to the claim, making sure you click on 'Save claim' each time.

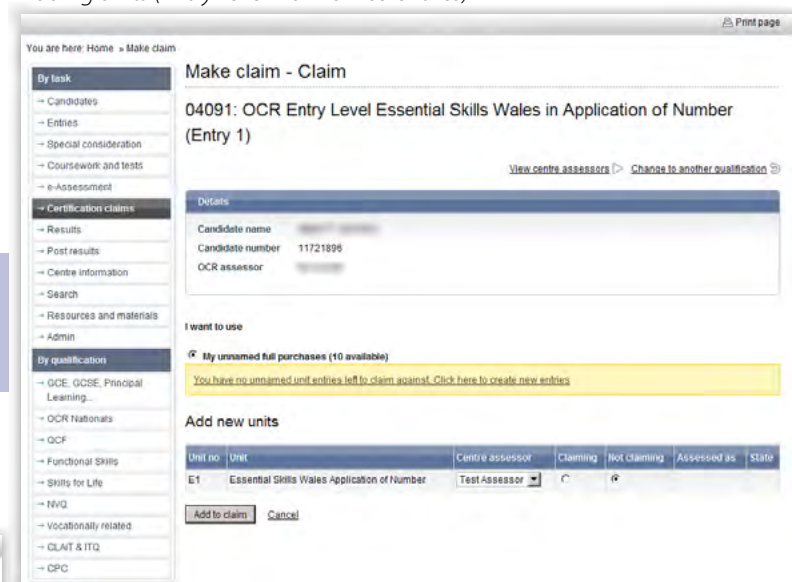*Adding units (Entry Level – named entries)*

Adding units (Entry Level – unnamed entries)
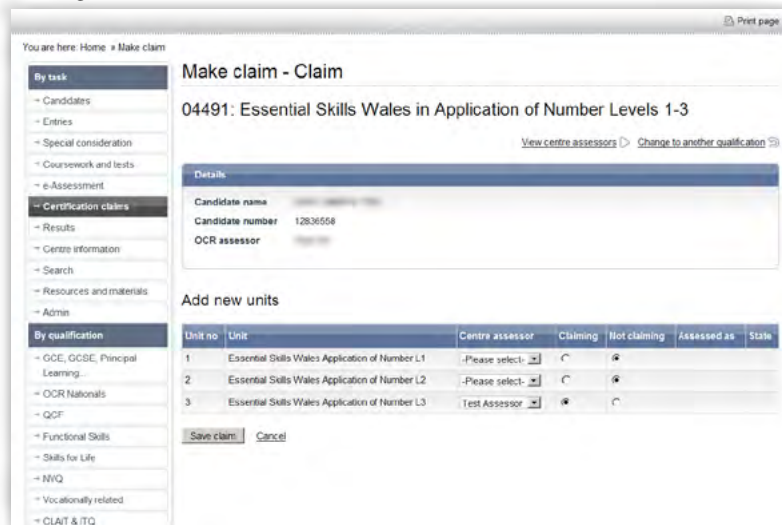
Levels 1–3

For Level 1–3 qualifications, you will see the qualification the candidate is entered for, at Levels 1–3 (in other words, three units). **Only select the award at the level you wish to claim for.**

To add the unit, select the centre assessor from the dropdown list and click the radio button in the 'Claiming' column **at the level you wish to claim for.**

Repeat this process for each candidate you'd like to add to the claim, making sure you click on 'Save claim' each time.

Adding units (Levels 1–3)

Note: For both Entry Level and Levels 1–3, if you have only entered one centre assessor, you will see that name pre-populated for every unit.

Note: Remember to save your additions before leaving each page. If you cancel or do not save a specific candidate claim, all the details you have entered will be removed – this includes candidate details if this is a new claim for a new candidate for an unnamed entry.

https://interchange.ocr.org.uk

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 'Functional Skills' in the left-hand menu and clicking on 'Make claim'. Search for the qualification, click on 'Edit' next to the claim, then click on 'View claim' to see 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: If you made unnamed entries and want to claim more units for a candidate (having already started a claim for this candidate), you can return to this claim as though it is a named candidate; the candidate will appear on your list of candidates for you to edit or add to a subsequent claim.

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

Removing a candidate from the claim

Entry Level
If you'd like to remove a candidate from the claim, find the claim and then click on 'Edit'. Next, click on the candidate's name to open the claim for that candidate. Click on the radio button in the 'Not claiming' column to remove the candidate from the claim and click on 'Save claim' (or 'Add to claim' if you have made unnamed entries).
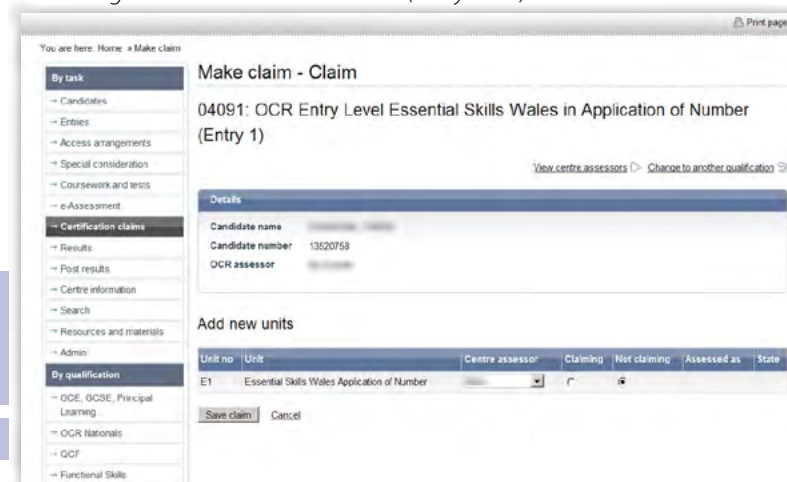
Levels 1–3
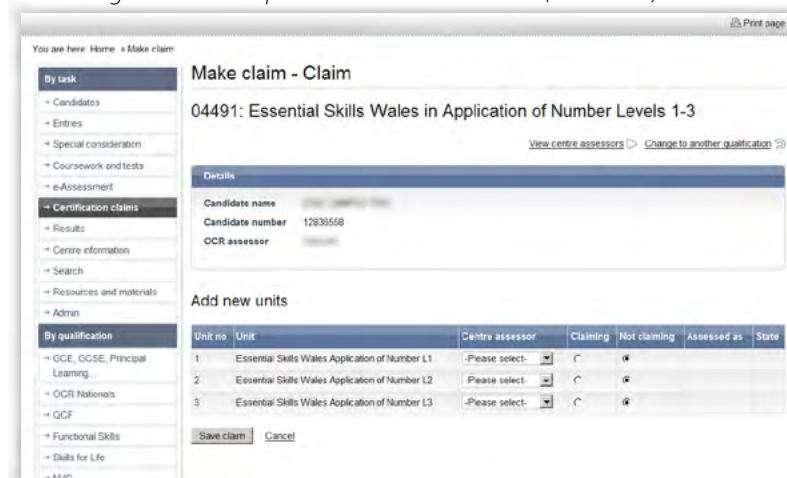If you'd like to remove a candidate from the claim, find the claim and then click on 'Edit'. Next, click on the candidate's name to open the claim for that candidate. Click on the radio button in the 'Not claiming' column for **all levels** and click on 'Save claim'.

Removing a candidate from the claim (Entry Level)

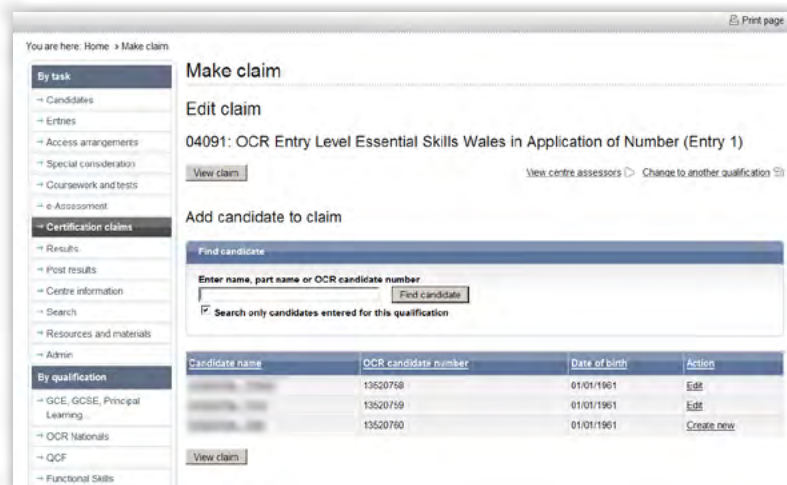*Removing a candidate/qualification from the claim (Levels 1–3)*

https://interchange.ocr.org.uk

Submitting the claim

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

Click 'View claim'

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.

Check claim details (Entry Level)

Check claim details (Levels 1–3)

For **Entry Level** only, you will also see a declaration and tick box on this page. This requires you to confirm that you have printed a copy of the claim to be included with the work submitted for moderation. If you do not tick this box, an error message will appear and you will not be allowed to submit the claim. Print the claim by clicking on the 'Print page' link on the right-hand side of the page before ticking the declaration box and clicking on 'Submit to assessor'.
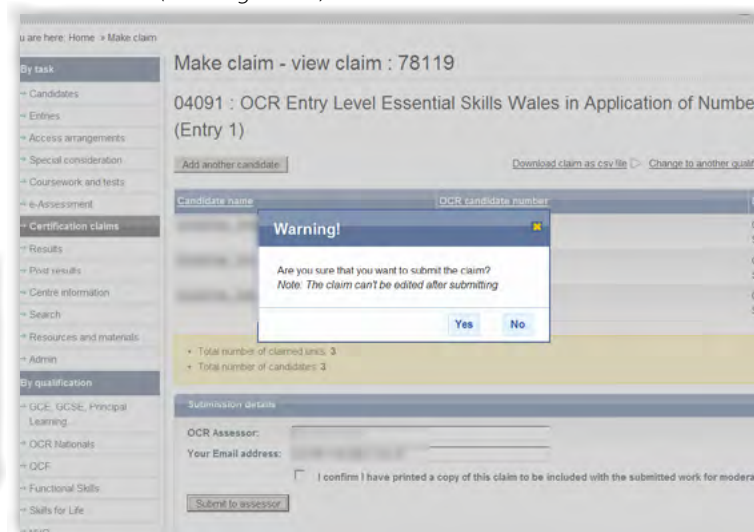
Declaration (Entry Level only)

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 to submit the claim as, after this point, you will not be able to edit it.

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.

Submit claim (warning screen)

When you submit the claim, you will see a message to confirm your claim has gone to the allocated OCR assessor. The OCR assessor will then receive an email to let them know that claims have been made.

Confirmation

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Submitting candidate work following an online claim (Entry Level only)

Within 24 hours of submitting your claim online, you need to send all of the candidate work to your examiner-moderator.

When sending your candidate work, you need to send a printout of the claim (see 'Submitting the claim' above for details) as well as a simple submission cover sheet for the claim – these can be downloaded from the relevant qualification page of the OCR website.
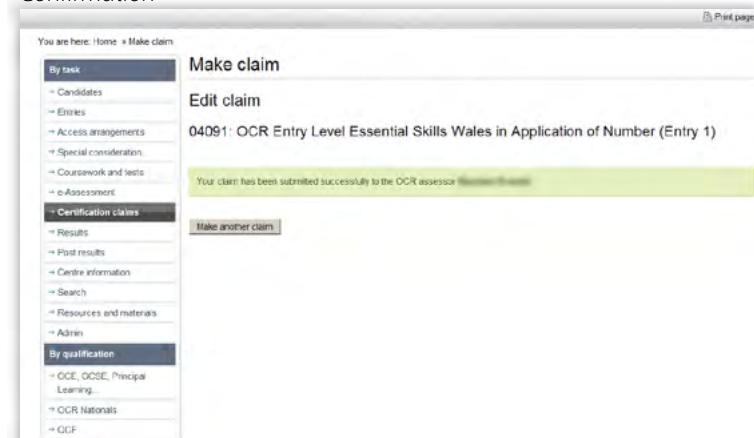
Note: You do not need to send a cover sheet for each candidate.

We are unable to return candidate work to centres, so you may wish to take a copy before submitting evidence.

Note: Please make sure that work for each claim is packaged separately; do not submit work for more than one claim in the same package.

We recommend that centres use a secure form of delivery to send the candidates' portfolios to their allocated examiner-moderator. We cannot take responsibility for any work lost in transit.
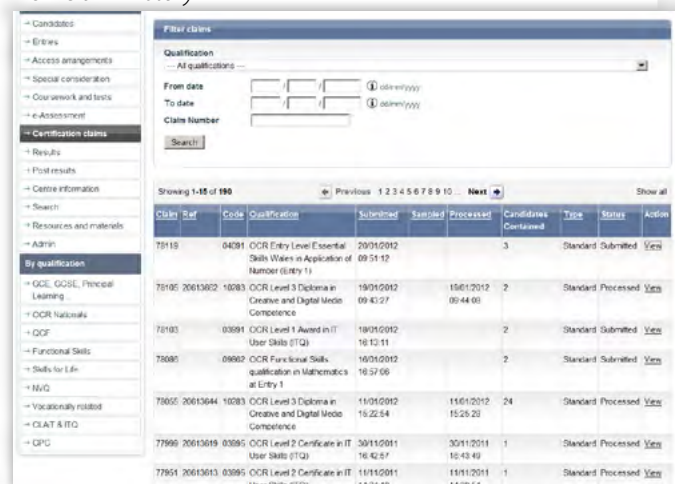
Checking the progress of a claim

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 'Certification claims' 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 your list of claims by clicking on the column headings.
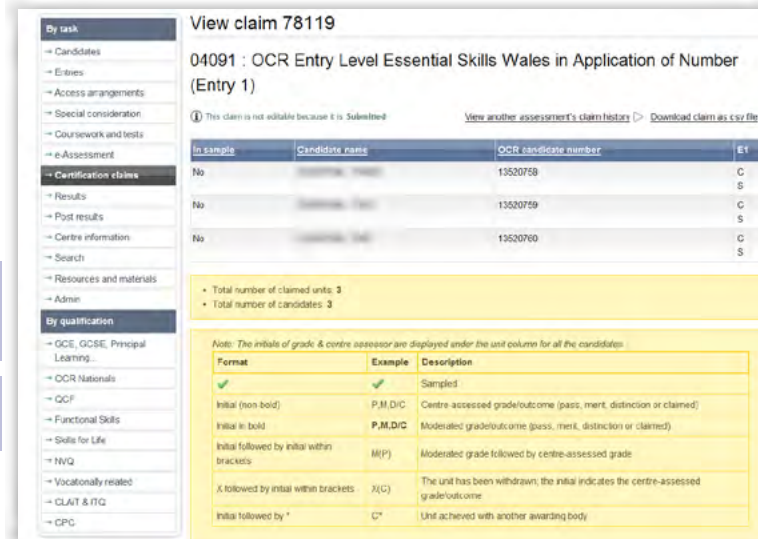
View claim history

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.

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
Submitted	The claim has been submitted to your assessor. It can no longer be edited.
Finalised	The claim has been revised/finalised by the OCR 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. If the assessor withdraws the claim, and the candidate wishes to achieve the qualification, when the candidate is ready, you simply need to make a new claim; there is no need to make a new entry.

Feedback reports

Entry Level

Once moderation is complete, the examiner-moderator will produce a centre feedback report for each batch of work submitted. This form is a multi-purpose document which is used to:

• Record the examiner-moderator's adjustments to the centre's assessment or administration

• Provide feedback to the centre on possible issues with the centre's assessment or administration.

To view the report, log in to Interchange, hover over 'Centre information' and then click on 'Examiner-moderator reports'.

Note: If you have made a number of small claims, only one report may be produced.

If you can't see the report . . .

• Check that you have submitted the claim (you can check the status by hovering over 'Certification claims' in the left-hand menu and clicking on 'View claim history').

• Check that you have sent everything you need to the OCR examiner-moderator.

• If the status is 'Submitted' and it's less than 35 days since you submitted the claim, the work is probably still with the moderator. If it's more than 35 days since submission and we haven't contacted you yet, contact the OCR Operations Key Skills Team on **02476 496555** or at keyskillsopsteam@ocr.org.uk, quoting your centre number, scheme code and claim number.

• If the OCR examiner-moderator has withdrawn the whole claim (rather than just individual candidates), OCR will send you the report directly (not via Interchange).

Levels 1–3

After each visit, the external verifier will prepare a quality assurance report, which will be emailed to you as soon as it is available. You can also access all of your reports via Interchange: just hover over 'Centre information' and then click on 'External verifier reports'.

If you don't receive the report…

If it's more than five days since your visit and you haven't received the report yet, please contact the OCR Customer Contact centre on **02476 851 509** or at vocational.qualifications@ocr.org.uk, quoting your centre number, scheme code and claim number.

Select 'Centre information' from the left-hand menu to view feedback reports
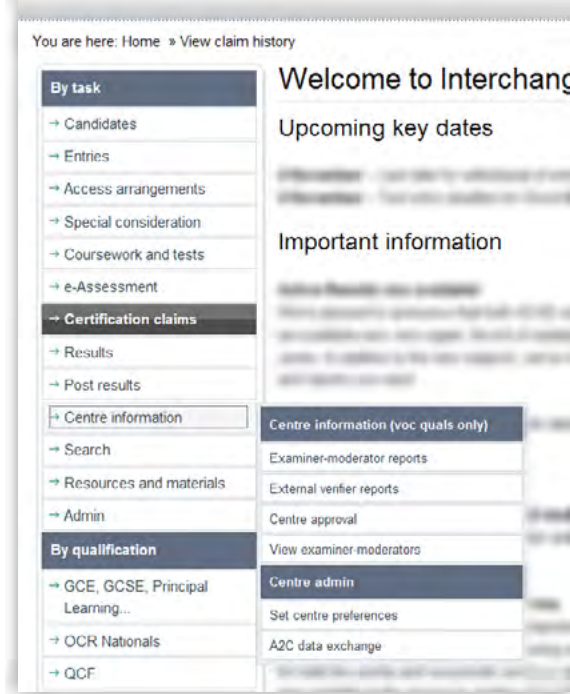
Left-hand navigation menu

Further support

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

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