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This guide explains how to make online claims for OCR vocational qualifications (QCF) via Interchange.

Interchange

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

Interchange quick start guide

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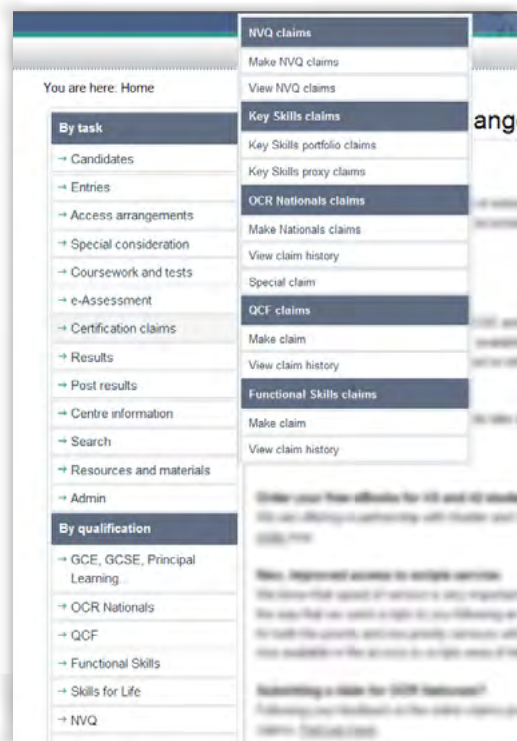
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Starting your online claim

To get started, log in to Interchange, hover over 'Certification claims' in the left-hand menu and click on the relevant 'Make claim' link within the qualification category you require.

Choose 'Certification claims' from the left-hand menu



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Select a qualification

You will then 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.

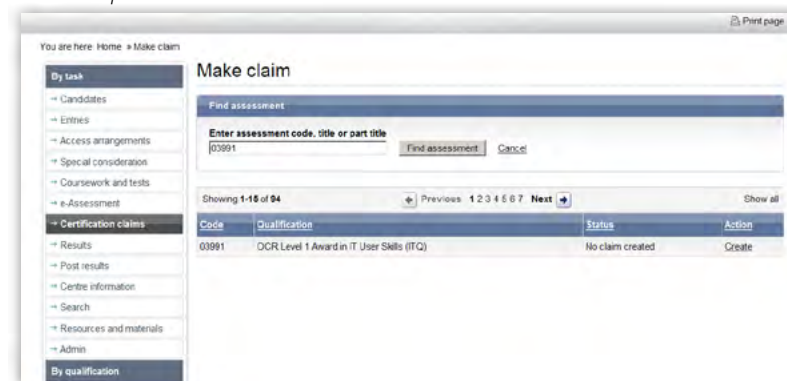
Note: You will **not** be able to build or submit a claim without valid entries.

Note: A claim can be built over a period of time and can contain multiple candidates and units. Please only submit a claim when you are ready for it to be moderated and processed.

If you're approved for a lot of vocational 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: 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'.

Select a qualification



The screenshot shows a web interface for creating a claim. On the left is a navigation menu with options like 'Candidates', 'Entries', 'Access arrangements', 'Special consideration', 'Coursework and tests', 'Assessment', 'Certification claims', 'Results', 'Post results', 'Centre information', 'Search', 'Resources and materials', and 'Admin'. The main area is titled 'Make claim' and contains a search box for 'Enter assessment code, title or part title' with a 'Find assessment' button. Below this is a table showing a list of qualifications:

Code	Qualification	Status	Action
03991	OCR Level 1 Award in IT User Skills (ITQ)	No claim created	Create

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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**.

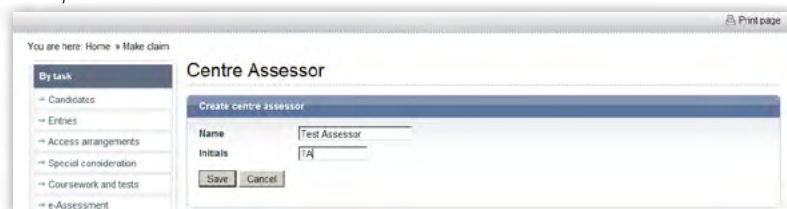
Note: These are the people within **your centre** who will be marking the assessment.

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.

Set up centre assessor




Name	Initials	Action
Test Assessor	TA	Edit

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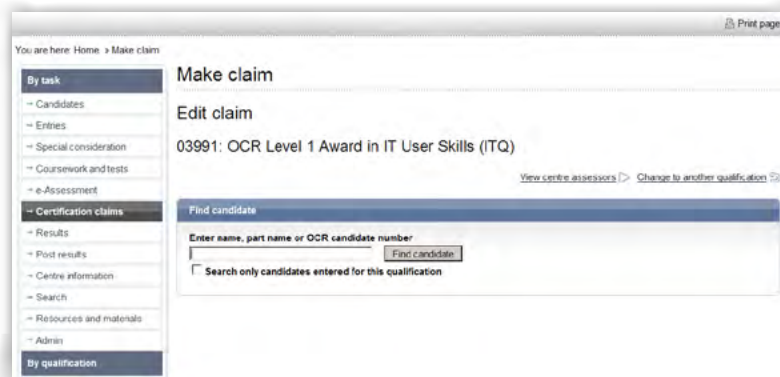
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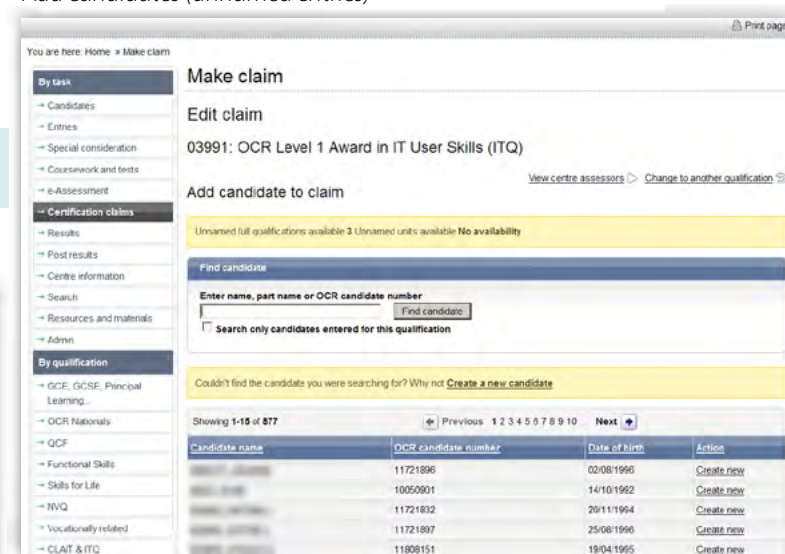
To begin building a claim for a candidate, click on 'Create new' next to each candidate's name. You will then see either all the available units for the qualification or, if you made unit entries, all the units the candidate is entered for.

Note: 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)



Add candidates (unnamed entries)



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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. These units should be claimed as part of your last claim before certification. You should claim these **before** OCR units if you are claiming both at the same time.

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'.

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

Select centre assessor and awarding body

Unit no	Unit name	Awarding Body	Data Claimed	Action
7	Bespoke software	AGA	19/01/2012	Remove

Units from another awarding body added

Unit no	Unit	Centre assessor	Claiming	Not claiming	Assessed as	State
1	Improving productivity using IT [Level 1]		<input type="checkbox"/>	<input type="checkbox"/>		
2	Improving productivity using IT [Level 2]		<input type="checkbox"/>	<input type="checkbox"/>		
3	Improving productivity using IT [Level 3]		<input type="checkbox"/>	<input type="checkbox"/>		
4	Audio software [Level 1]		<input type="checkbox"/>	<input type="checkbox"/>		
5	Audio software [Level 2]		<input type="checkbox"/>	<input type="checkbox"/>		
6	Audio software [Level 3]		<input type="checkbox"/>	<input type="checkbox"/>		
7	Bespoke software [Level 1]		<input checked="" type="checkbox"/>	<input type="checkbox"/>		Another AB
8	Bespoke software [Level 2]		<input type="checkbox"/>	<input type="checkbox"/>		
9	Bespoke software [Level 3]		<input type="checkbox"/>	<input type="checkbox"/>		
10	Computerised accounting software [Level 1]		<input type="checkbox"/>	<input type="checkbox"/>		
11	Computerised accounting software [Level 2]		<input type="checkbox"/>	<input type="checkbox"/>		

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

Note: Where a previous claim has been made for a candidate, if you made full award entries, the claim will show those units as achieved or, if you made unit entries, those units will not appear on the list.

To add a unit, select the centre assessor from the dropdown list (you can select different assessors for different units) and click the radio button in the 'Claiming' column. To save these changes, click 'Save claim'.

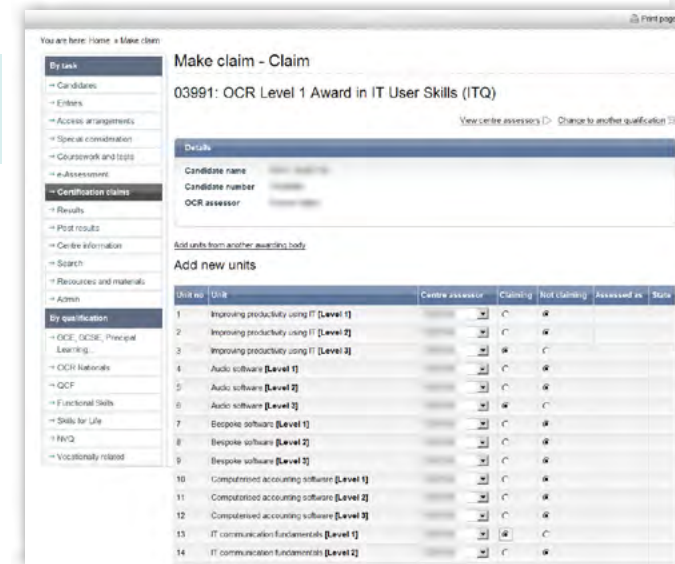
Note: If you have only entered one centre assessor, you will see that name pre-populated for every unit.

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

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.

Every unit you submit will decrease the total of your available unnamed unit purchases. If this gets low, you may need to make more unnamed entries before you can complete a claim.

Adding OCR units



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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 claims'. 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.

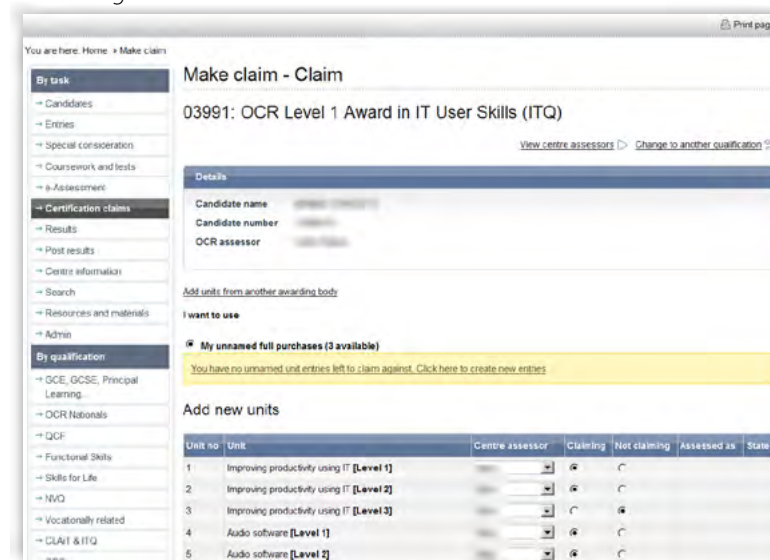
Note: You can claim some or all of the units required to claim the full qualification. If you only claimed some units, before submitting the claim, you can return to this claim and continue to add units to it as they are achieved. The full award will be issued automatically as soon as all the criteria have been met.

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'. 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 a unit from their claim and click on 'Save claim' (or 'Add to claim' if you made unnamed entries).

Removing a unit from the claim



The screenshot shows the 'Make claim - Claim' page for '03991: OCR Level 1 Award in IT User Skills (ITQ)'. It includes a 'Details' section with candidate information and a table for 'Add new units'.

Unit no	Unit	Centre assessor	Claiming	Not claiming	Assessed as	State
1	Improving productivity using IT [Level 1]		<input checked="" type="radio"/>	<input type="radio"/>		
2	Improving productivity using IT [Level 2]		<input checked="" type="radio"/>	<input type="radio"/>		
3	Improving productivity using IT [Level 3]		<input checked="" type="radio"/>	<input type="radio"/>		
4	Audio software [Level 1]		<input checked="" type="radio"/>	<input type="radio"/>		
5	Audio software [Level 2]		<input checked="" type="radio"/>	<input type="radio"/>		

Removing a candidate from a claim

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 units** and click on 'Save claim' (or 'Add to claim' if you made unnamed entries).

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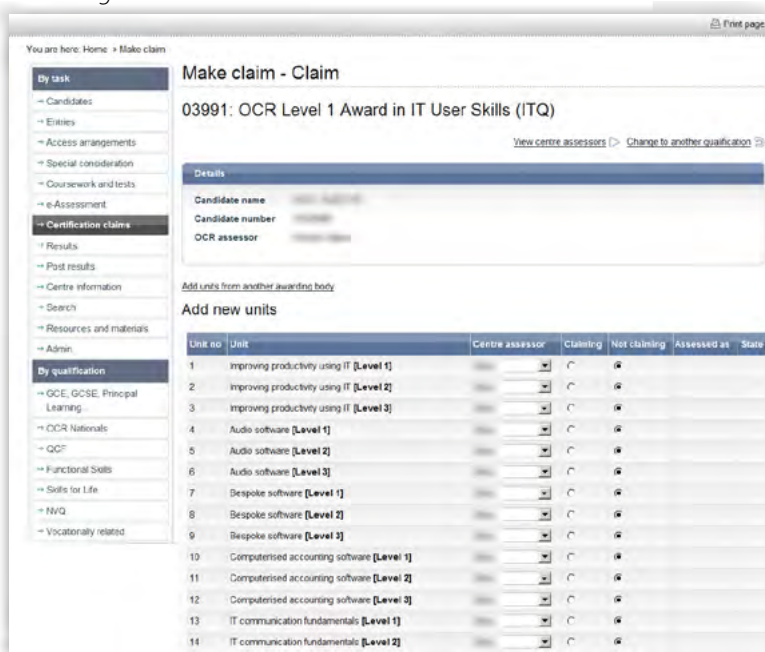
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Removing a candidate from the claim



Make claim - Claim
03991: OCR Level 1 Award in IT User Skills (ITQ)

Details

Candidate name: [redacted]
Candidate number: [redacted]
OCR assessor: [redacted]

Add new units

Unit no	Unit	Centre assessor	Claiming	Not claiming	Assessed as	State
1	Improving productivity using IT [Level 1]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
2	Improving productivity using IT [Level 2]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
3	Improving productivity using IT [Level 3]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
4	Audio software [Level 1]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
5	Audio software [Level 2]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
6	Audio software [Level 3]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
7	Bespoke software [Level 1]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
8	Bespoke software [Level 2]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
9	Bespoke software [Level 3]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
10	Computerised accounting software [Level 1]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
11	Computerised accounting software [Level 2]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
12	Computerised accounting software [Level 3]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
13	IT communication fundamentals [Level 1]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]
14	IT communication fundamentals [Level 2]	[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]

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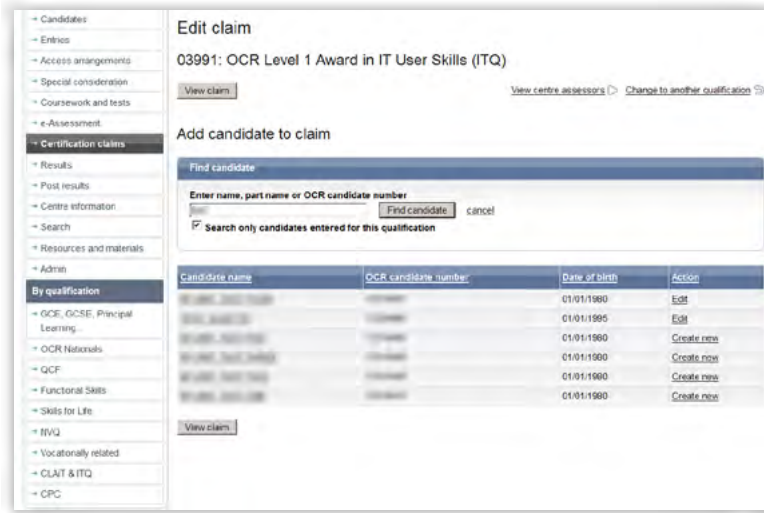
Further support

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.

Note: We recommend that you submit the claim in one file rather than individually. This will help the OCR assessor in the sampling process.

Click 'View claim'



Edit claim
03991: OCR Level 1 Award in IT User Skills (ITQ)

View claim

Add candidate to claim

Find candidate

Enter name, part name or OCR candidate number

Find candidate cancel

Search only candidates entered for this qualification

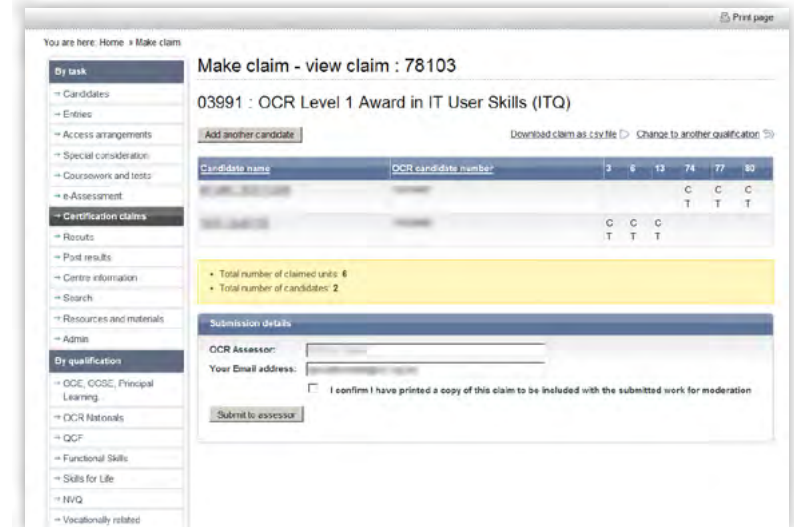
Candidate name	OCR candidate number	Date of birth	Action
John Smith	123456	01/01/1980	Edit
Jane Doe	789012	01/01/1985	Edit
John Smith	123456	01/01/1980	Create new
Jane Doe	789012	01/01/1985	Create new
John Smith	123456	01/01/1980	Create new
Jane Doe	789012	01/01/1985	Create new

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



Make claim - view claim : 78103

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

Download claim as csv file Change to another qualification

Candidate name	OCR candidate number	3	6	13	74	77	80
John Smith	123456				C	C	C
Jane Doe	789012				T	T	T

Total number of claimed units: 6
Total number of candidates: 2

Submission details

OCR Assessor: [text box]

Your Email address: [text box]

I confirm I have printed a copy of this claim to be included with the submitted work for moderation

Submit to assessor

For **remote assessments 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'.

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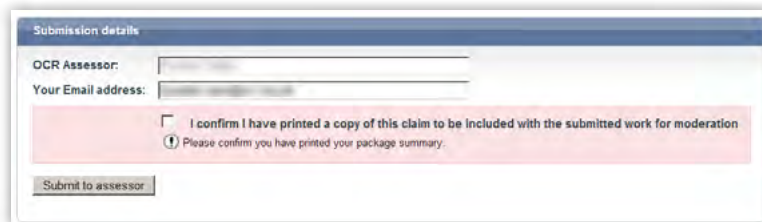
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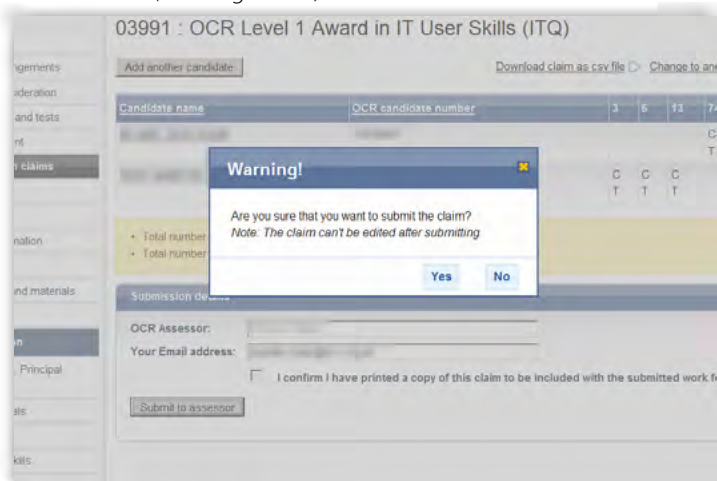
Declaration



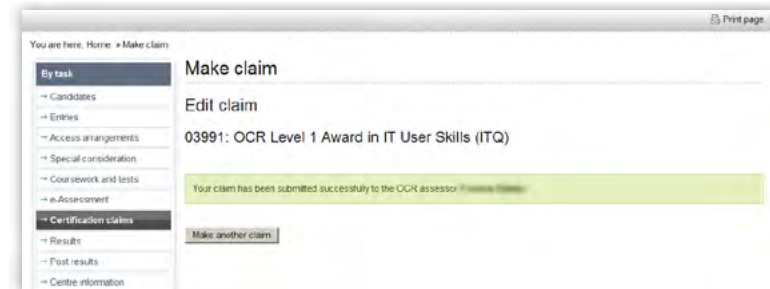
When you click on 'Submit to assessor' (or 'Submit to OCR' if you have direct claim status for externally verified qualifications), a warning message will appear, prompting you to confirm that you want to submit the claim. Only click 'yes' if you are ready to submit the claim as, after this point, you 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)



Confirmation



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Submitting candidate work following an online claim (postally examined/moderated qualifications)

Within 24 hours of submitting your claim online, you need to send all of the candidate work to your examiner-moderator. Alternatively, some qualifications allow evidence to be sent electronically – please see the relevant qualification centre handbook.

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 each candidate. These can be downloaded from the relevant qualification page of the [OCR website](#).

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.

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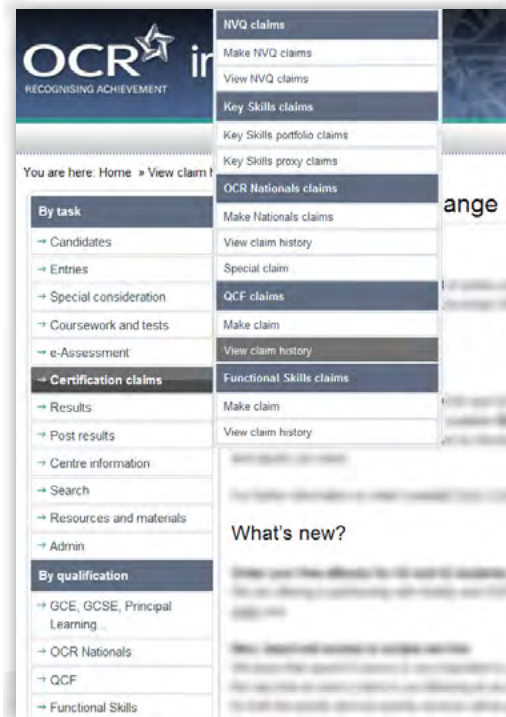
Checking the progress of a claim

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 'Certification claims' in the left-hand menu and then click on 'View claim history' within the qualification category you require.

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 it for your own records.

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.

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

Status	Comments
<i>Submitted</i>	The claim has been submitted to your assessor. It can no longer be edited.
<i>Finalised</i>	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.
<i>Processed</i>	The claim has been sent to OCR and results should appear on Interchange in approximately 48 hours.
<i>Withdrawn</i>	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.

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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 Operations VRQ Team on 02476 496553 or at opsvrqteam@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).

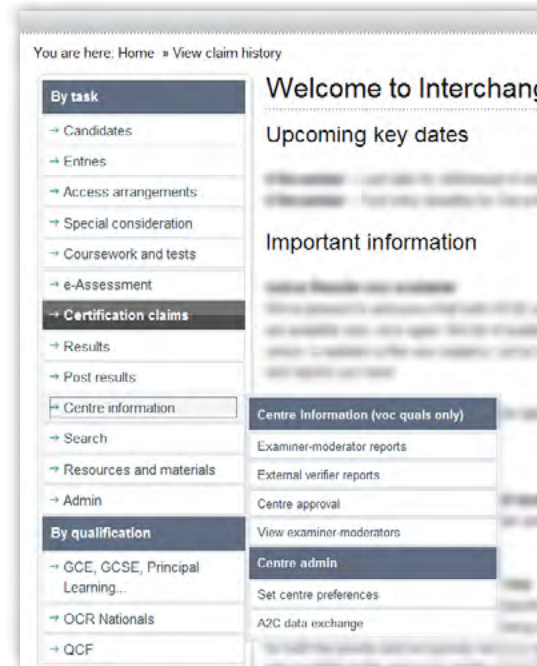
Externally verified qualifications

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



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OCR Customer Contact Centre

02476 851509

vocational.qualifications@ocr.org.uk

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