

# CBC SCHOOLS: Transfer Y4 data from Integris Assessment

## Stage 1: Prepare the Y4 TRANSFERS 2019 Markbook



The **Y4 TRANSFERS 2019** markbook (see page 3 for a snapshot) will enable you to transfer matched KS1 data (2017) and this year's Year 4 TA data to the destination schools for their new September 2019 intake.

To be undertaken by the Integris Administrator only.

Stage 1 steps cover the following:

1. Set up the **Y4 TRANSFERS 2019** markbook
2. Assign the **Y4 TRANSFERS 2019** markbook to year 4 pupils
3. Check the content of the **Y4 TRANSFERS 2019** markbook for missing data

### 1. Set up the **Y4 TRANSFERS 2019** markbook with Year 4 pupils

#### 1.1 Go to **Modules > Assessment** and **Assessment Planning**

The Assessment Plans window will be displayed

#### 1.2 Expand the Templates Folder by clicking on the Plus Symbol next to **Templates**

#### 1.3 Then click on the Plus symbol next to **LA Templates**

#### 1.4 Then click on the Plus symbol next to **Y4 Transfers**

The Y4 Return folder will open to reveal the **Y4 TRANSFERS 2019** assessment plan



#### 1.5 Click on the **Y4 TRANSFERS 2019** template name

#### 1.6 Now click on **Deploy** (top right of screen)

#### 1.7 Click No to the next prompt

#### 1.8 You will see your selected **Y4 TRANSFERS 2019** markbook listed and highlighted in the **Y4 Transfers** folder in **My Assessment Plans** on the **Assessment Plans** screen.

You can now follow with step 2 to complete this process.

### 2. Assign the **Y4 TRANSFERS 2019** markbook to the Year 4 pupils

#### 2.1 With the **Y4 TRANSFERS 2019** markbook highlighted, click the Edit an Assessment Plan icon

#### 2.2 On the **Edit Assessment Plan** screen, click on the **Enrolled Groups** tab

Edit Assessment Plan - Y4 CBC TRANSFER 2015

Preview | Print Plan

Group Name	Year	Sub-groups	Markbook Users	
Class 2A	2014/2015		Mr Phillip Catman	+ ✎ 🗑️ 🔗

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2.5 Click the **Add an Enrolled Group** icon  and you should see your classes with the teacher names linked to each class.

*You only need to assign the **Y4 TRANSFERS 2019** markbook to the Year 4 cohort only.*

2.6 Staying on the **Enrol Groups** screen, change the **Enrolled Group Type** field to **Year Group** and select **Year 4** and click **Add**. Then click **Close**.

Now you need to assign yourself as the Integris Administrator to the Y4 Transfer markbook and any other user (eg: Headteacher) that may need to access it.

2.7 Select the year 4 group markbook from the list and click on the **Markbook Users**  icon.

All the staff users to whom you have given Assessment as one of their roles will be listed.

2.8 Select your own User ID (as the administrator) as a user for the **Y4 TRANSFERS 2019** markbook and then click OK.

This will give you access and enable you to create the transfer files to send to the destination schools.

Select any additional users as required at this point.

2.9 Then click **Save** when you have finished.

2.10 To check that you now have access to the **Y4 TRANSFERS 2019** markbook, go to **Modules > Assessment > Markbook >** click the plus symbol next to **My Markbooks >** you should now see a copy of **Y4 TRANSFERS 2019** markbook(s) listed for Year 4 > select the **Y4 TRANSFERS 2019** markbook.

2.11 Click **Open a markbook** icon  to view it.

The **Y4 TRANSFERS 2019** markbook should contain the Year 4 pupils' EYF 2015 outcomes; KS1 TA outcomes from 2017 **and** their **Y4 TAs** from this year.

**Note:** if you have not recorded any Y4 TA data either for your own purpose or for the CBC LA return this term, then they will not appear in the Y4 2019 TA unit.

The example below is what you will see when you first open the **Y4 TRANSFERS 2019** markbook: *The **KS1 2017 TA** unit and the **Y4 2019** unit have been expanded by clicking on the  symbol.*

Markbook - Y4 TRANSFERS 2019 - Class 2A (2018/2019)

Name	Destination School	Date of Birth	SEN Stage	Ever FSM Entitled to FSM	Ethnicity	Any Premium Ever	Language	Gifted And Talented	ESOL	Traveller	KS1 2017 TA				Y4 2019			
											EYF 2015	KS1 En Rea	KS1 En Wri	KS1 Ma TA	KS1 S-C TA	Y4 Read TA	Y4 Write TA	Y4 Maths TA
Coppard, Ciaran	4567	23 Feb 2005	A	N	N	N	WSCO	ENG	N	N	N	EXS	EXS	EXS	HNM	2	2	3
Evett's, Kieran	2310	20 Oct 2004	P	N	N	N	WTUK	ENG	N	N	N					2	1	3
Lawrence, Amber	n/s	13 Sep 2004	P	N	N	N	WBRI	ENG	N	N	N					3	3	3

These Y4 TA results are drawn from the **CBC Y4 TA 2019 Return** markbook

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Next, go to **Administration > Utilities > Update Year Independent Markbooks...** > select **EYF** from the '**Select Key Stage**' box and select Year 4 from the list > click **Update**. Click Yes to any prompts. Go back to the **Y4 TRANSFERS 2019** markbook and re-open it. Check this unit again – if EYF outcomes were recorded in Integris previously, they should now appear.

There may be some pupils who do not have EYF outcomes – most likely being those that joined the school after Year R.

Missing EYF data can be obtained from K2S – we recommend you focus on searching for KS1 data and if EYF data becomes available at the same time, you can enter it in an individual record as per instructions for KS1.

#### Phonics 2016 unit: this unit contains a phonics mark and an outcome column

- **Are these populated with outcomes for the majority of pupils?**

**If yes**, continue to next Unit.

**If no**, click **Back** to exit the markbook.

Next, go to **Administration > Utilities > Update Year Independent Markbooks...** > select **Pho Final** from the '**Select Key Stage**' box and select Year 4 from the list > click **Update**. Click Yes to any prompts. Go back to the **Y4 TRANSFERS 2019** markbook and re-open it. Check this unit again – if Phonics marks and outcomes were recorded in Integris previously, they should now appear.

There may be some pupils who do not have Phonics outcomes – most likely being those that joined the school after Year 1.

Missing Phonics data can be obtained from K2S – we recommend you focus on searching for KS1 data and if Phonics data becomes available at the same time, you can enter it in an individual record as per instructions for KS1.

#### KS1 2017 TA Unit: this contains the KS1 outcome columns for KS1 Reading, Writing, Maths and Science.

- **Are these populated with outcomes for the majority of pupils?**

**If yes**, continue to next bullet point.

**If no**, click **Back** to exit the markbook.

Next, go to **Administration > Utilities > Update Year Independent Markbooks...** > select **KS1** from the '**Select Key Stage**' box and select Year 4 from the list > click **Update**. Click Yes to any prompts. Go back to the **Y4 TRANSFERS 2019** markbook and re-open it. Check this unit again – if KS1 outcomes were recorded in Integris previously, they should now appear.

- **Are there any missing KS1 outcomes for any individual Y4 pupils?** [*nb. Likely to be new pupils to your school since Year 2*].

**If no**, go to the **Y4 2019 TA** Unit description below.

**If yes**, note down these pupil names. Next, go to each of their records and obtain their UPNs. You will need to login to Keys to Success (via the DfE Sign-in gateway) to see if KS1 2017 data is present for them. When logged into Keys to Success, click on **Pupil Searchable data** > click the **I confirm ...** box and enter/paste in one of the UPNs in the empty text box and click Search. If the search returns a KS1 csv file, open this file and note down the outcomes for KS1 Read, Writing, Maths & Science for the pupil. Repeat this process for the next pupil by clicking on **Pupil Searchable Data** and repeating this step.

- **Add missing KS1 outcomes**; when you have obtained the KS1 outcomes for those pupils with missing KS1 data you then need to:
  - > find each of the respective pupils' records in turn in **Student Details** and for each, click **Edit**
  - > click on the **Key Stage** tab, and click **KS1**
  - > enter **2017** as the **KS1 Assessment Year**
  - > tick the tick box for **End of Statutory Assessment**
  - > enter the outcomes into each of the corresponding subject result boxes Read, Writ, Maths and Science
  - > click **Save** when you have completed each record.

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- Where no KS1 outcomes were available from K2S, then the KS1 data remains blank
- **Finally and importantly**, to ensure this data is pulled through into the Y4 Transfer 2019 markbook, you need to go to **Administration > Utilities > Update Year Independent Markbooks...** > select **KS1** from the 'Select Key Stage' box and select **Year 4** from the list > click **Update**. Click Yes to any prompts.  
**Check the KS1 2017 Unit in the Y4 TRANSFERS 2019 markbook again to ensure all data (where available) is now present.**

**\*\*\*\*TIME SAVING TIP for obtaining any missing EYF, Phonics and/or KS1 data for Year 4 pupils:**

For each pupil who has missing data, copy their UPN number into a list on a spreadsheet. When your list of UPNs is complete, go to KS2 via Dfe Sign-in and click on Pupil Searchable Data (and click on the confirm box). Copy the list of UPNs from your spreadsheet and paste them into the empty text box and click Search.

You will see a CTF link – click on this and download the CTF file to a location you remember! You can also download the CSV link and either save or open – this file will confirm to you what attainment data is in the CTF.

Now import the CTF – in Integris, go to Administration > Import & Export > Import CTF > click next and accept any warning messages. When the import is complete, you will need to go to Administration > Utilities > Update Year Independent Markbooks... > and then select in turn each EYF/ PHO Final Check/ KS1 from the 'Select Key Stage' box and select **Year 4** from the list > click **Update**. Click Yes to any prompts.

Go back to the **Y4 TRANSFERS 2019** markbook and check for the available data to be pulled through.

**Y4 2019 Unit:** these columns automatically capture the **Y4 TA data that has been entered for your school to make a Year 4 return to the LA**. If your school has not entered this data in the **CBC Y4 Return 2019 markbook**, then this unit will be blank. *Refer to point 3 above if you want to include Y4 TA data (in the format reported to LA) for your destination schools.*

When you have checked that the data expected is present and correct, you are ready to create transfer files for your destination schools.

Proceed to **Stage 2\_CreateY4Transfer\_Files**.

## Transferring Y4 data from Integris Assessment Stage 2: Create Y4 Transfers Files

### To be undertaken by the Integris Administrator

Stage 2 contains the following **two** main steps:

1. Check status of markbook and note the destination middle schools
2. Create the transfer files

#### 1. Check the status of the markbook:

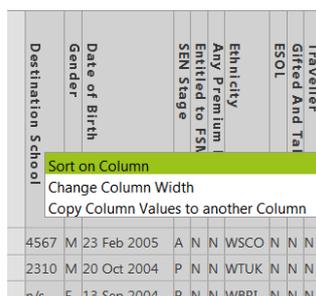
- 1.1 Go to **Assessment > Markbooks** > select the **Y4 TRANSFERS 2019** markbook assigned to your **Year 4** pupils to highlight it in bold.

- 1.2 Click the **Open Markbook**  icon

At this stage, the **Y4 TRANSFERS 2019** markbook has been checked for the required data present and is now ready for use to create transfer files to destination schools.

#### 2. Check and note the destination middle/primary schools

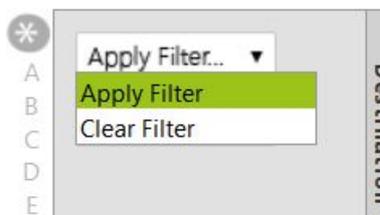
- 2.1 Sort the Destinations schools column to group the different destination schools together by **left clicking the column heading** for destination school and click on **Sort on Column**.  
This action will group together all the destination schools in ascending order. Repeat it to sort the schools in descending order.



Destination School	Gender	Date of Birth	SEN Stage	Entitled to FSN	Ethnicity	Any Premium	ESOL	Traveller	Gifted And Tal
4567	M	23 Feb 2005	A	N	N	WSCO	N	N	N
2310	M	20 Oct 2004	P	N	N	WTUK	N	N	N
n/s	F	13 Sep 2004	P	N	N	WBRI	N	N	N

- 2.2 Hover over each of the different DfE numbers **and note down the different destination school names and their DfE numbers, also making a note of the number of pupils that have the same destination school**. [Note: the number of different DfE numbers you list represents the number of transfer files you need to create in step 3 below].

- 2.3 Click **Apply Filter > Apply Filter** (at top left of markbook)



You will be presented with the following filter window:

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## Stage 2: Create Y4 Transfers Files



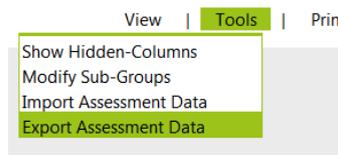
- 2.4 Now **set the filter** appropriately:
- > Select **Destination School** from the **Markbook Item** pull-down list
  - > Select **is equal to** from the **Criteria** pull-down list
  - > In the **Value** box, **type in one** of your destination DfE numbers
  - > click **OK**

After a few seconds, the markbook will only contain the pupils who have been assigned to the destination school you entered into the filter window.

You are now ready to create a transfer file for this destination school. Follow steps below.

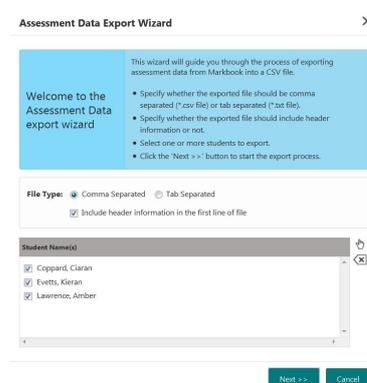
### 3. Create Y4 Transfers files for Middle or other schools

- 3.1 Take a few minutes to check that all the pupils are present in the markbook for the destination school selected.
- 3.2 To create the Y4 Transfers file for this filtered destination school, go to the **Tools** menu (top right of the markbook screen) and select **Export Assessment Data**



*Note: If you have made any changes to the markbook which have not been saved, you will be reminded to click **Save** before proceeding.*

*You are presented with the following Assessment Data Export Wizard screen:*



*All the Year 4 pupils assigned to the filtered destination school should already be selected in the list.*

- 3.3 Click **Next**

## Y4 TRANSFERS

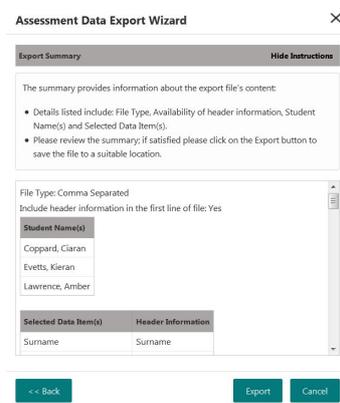
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The next window shows you that all of the data columns (bottom left section of the window) and all the contextual columns have been selected to be included in the transfer file as well as the UPNs, Surnames and Known names of the pupils.

#### 3.4 Click **Next**

The final screen displays a summary of what was selected for the transfer file.



Assessment Data Export Wizard

Export Summary Hide Instructions

The summary provides information about the export file's content:

- Details listed include: File Type, Availability of header information, Student Name(s) and Selected Data Item(s).
- Please review the summary: if satisfied please click on the Export button to save the file to a suitable location.

File Type: Comma Separated  
Include header information in the first line of file: Yes

Student Name(s)  
Coppard, Claran  
Evetts, Kieran  
Lawrence, Amber

Selected Data Item(s)	Header Information
Surname	Surname

Back Export Cancel

#### 3.5 Click **Export**

#### 3.6 In the next window, select **Open with Microsoft Office Excel**.

Your Year 4 pupils and all the TA levels along with the contextual items will be listed.

*This is your final opportunity to check that the data is all present and correct and the additional contextual items selected appear at the beginning of the spreadsheet.*

#### 3.7 Within Excel, click on **File > Save As...**

> **select an appropriate folder to save your Y4 Transfers file in** (or create a new folder called Y4 Transfers 2019 to save this file and subsequent files in)

> **ensure that Save As Type displays CSV (Comma Delimited)**

> **enter filename as <yourschoolname> Y4 Transfers 2019 to <destination schoolname>** (eg; AshwellLower Y4 Transfers 2019 to Faraway Middle)

> **answer Yes to any saving and formatting prompts and close the file.**

#### 3.8 Going back to the Year 4 Transfers 2019 markbook, you now need to filter the next destination school and repeat the above steps **from step 2.3 above** for each of the remaining destination schools on your list.

*When you have created a transfer file for each destination school, click **Back** to exit out of the markbook, saving any changes.*

You are now ready to send the transfer files to your Middle or other destination schools: **see below**.

#### Send Transfers files to destination schools:

##### CBC Schools:

##### > Via Anycomms to other schools in Central Beds

> login to Anycomms and from the home menu select Send to an Organisation

> upload each transfer file (as previously named from the folder you saved them in (eg; AshwellLower Y4 Transfers 2019 to FarawayMiddle; AshwellLower Y4 Transfers 2019 to

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*SomewherMiddle* etc. – *there is no need to change the names of these transfer files*) >and select the appropriate Middle school **within CBC** to send to.

#### **BBC Schools:**

##### ➤ **Via Anycomms to other schools in Bedford Borough**

- > login to Anycomms and from the home menu select Send to an Organisation
- > upload each transfer file (as previously named from the folder you saved them in (eg: *AshwellLower Y4 Transfers 2019 to FarawayMiddle*; *AshwellLower Y4 Transfers 2019 to SomewherMiddle* etc. – *there is no need to change the names of these transfer files*) >and select the appropriate Middle school **within BBC** to send to.

#### **All schools: sending to schools in another authority**

##### ➤ **Via S2S to schools in other authorities**

> please **zip the transfer file and rename** the zip file as follows in the case of sending to a Bedford Borough school from a CBC school: **823dddd\_822aaaa\_Y4Transfers.zip** (where dddd=your DfE number and aaaa=destination school's DfE number). *The 822 relates to Bedford Borough – replace 822 with the appropriate LA number for the destination school*

- > Then logon to DfE Sign-in and select the **S2S** web site
  - > From the side menu, click on + next to Upload
  - > Select **Upload Generic File**
  - > Click Browse and locate the zipped transfer file (named as above)
  - > Click Upload File
- When the file has been sent, repeat as above for the next file or Logout.

Please contact the destination schools to let them know that you have sent a transfer file.

*Well done – you have completed the Y4 Transfers process!*