



caspa

Comparison and Analysis of Special Pupil Attainment

Updating to CASPA 2026 for users of a CASPA 2023 School Module

This document summarises the options and relevant procedures for updating to CASPA 2026 for existing users of CASPA 2023.

Introduction:

You will only use this document if you are still using CASPA 2023. CASPA 2023 provided analysis for pupils who were on roll in the 2022/2023 academic year. An update path is still supported from CASPA 2023 to CASPA 2026 and as a result, you can either update one year at a time, populating each CASPA year with pupil data at each step, or jump straight to CASPA 2026. This document will discuss the options to enable you to make the best decision for you, and then guide you through the procedure that supports the option you choose.

1. Your decision

At this point, you have three options:

1. Update one year at a time through CASPA 2024 and CASPA 2025 to give you the best set of historic data for each year's on roll cohort
2. Update CASPA to CASPA 2026 without adding records for intermediate years
3. Ignore CASPA 2023 and start afresh with a new CASPA 2026 installation

The following may assist with deciding which option is correct for you:

- First check that you have any data at all in CASPA. In the unlikely event that your CASPA 2023 installation had never been used, select option 3.
- The feature 'Set effective year' in CASPA allows you to turn the clock back to a particular year that you were using CASPA (eg CASPA 2022) and carry out analysis for pupils on roll in that year. In order for this feature to be enabled for a particular year, your CASPA installation must have been populated with pupil records (ie, which pupils were on roll in the summer term of that year) and assessment data. In order to use the set effective year feature for summer 2024 and 2025, you must select option 1.
- If you update directly to CASPA 2026, CASPA will have no knowledge about which pupils were on roll in summer 2024 and summer 2025. If you are unable to create exports from your school MIS that identifies exactly those pupils who were on roll in the summer terms of 2024 and 2025, but you have data in CASPA 2023 that you wish to retain, option 2 is most likely to be the right option. You can still 'set effective year' to CASPA 2023 (or as far back as CASPA 2008 if you used that version) and the historic data for pupils who are still on roll will remain available.

2. Implementing your chosen option

Option 1. Update CASPA one year at a time, importing data after each update

In summary, this option will require that you first update to CASPA 2024 and then import pupil data and results, then repeat for CASPA 2025, and finally update to CASPA 2026.

Step 1: Check your data in CASPA 2023 was updated

First check that summer 2023 assessment results were recorded in CASPA 2023. Updating to CASPA 2024 will cause assessment results for Summer 2023 and targets for Summer 2024 recorded

in CASPA 2023 to be 'carried forward' to CASPA 2024 as the start value for the 2023/2024 academic year for pupils who were on roll in 2022/2023. As a result, it is valuable to ensure that the results and targets carried forward are up-to-date and representing those that were relevant in summer 2023.

Go to **Data | CASPA assessment data**. The left hand column (of the 3 columns normally displayed for both Core and Foundation subjects) will display the summer 2023 results if CASPA 2023 is up to date. If not, you are advised to update these at this stage since updating will result in CASPA carrying forward results and targets – so these should be the correct results and targets to avoid you needing to correct them later.

Results and targets can be entered manually into CASPA 2023 or imported from a wide range of electronic sources; for further information, refer to the appropriate guidance note available via the menu option **Help | Guidance notes**.

Step 2: Updating from CASPA 2023 to CASPA 2024

Please note that the process of downloading and installing the CASPA update will only be successful if the user carrying out this task has sufficient network privileges and if the download and execution of the CASPA update is not blocked by either firewalls or other IT security policies that may be in place. If you have any concerns as to whether your network user account has sufficient privileges, please contact your network administrator for advice, or ask a user with full Administrator rights to assist you.

If CASPA's update process encounters a problem during execution, a log file explaining the actions required to resolve any issues that prevented the update from completing will be generated.

To carry out the update from CASPA 2023 to CASPA 2024, go to the following web page and follow the instructions provided. Once complete, return to this document again and proceed to the next step.

<http://www.sgasystems.co.uk/caspa/updates/manual/CaspaUpdate2410.htm>

Step 3: Creating pupil records in CASPA 2024

On completion of the update to CASPA 2024, your CASPA installation will have been updated to CASPA 2024, but will not contain any information regarding which pupils were on roll at Summer 2024. If you were to update this 'empty' CASPA 2024 system to CASPA 2025 immediately, you will not be able to 'turn back the clock' to view data for the cohort of pupils on roll at Summer 2024.

In order to be able to record results, targets or evidence for pupils who were leavers during the 2023/2024 academic year, and to be able to 'turn the clock back' in CASPA 2026 to view data for your 2023/2024 cohort as if you were running CASPA 2024, pupil records for those pupils on roll at Summer 2024 must be created in CASPA 2024 before updating to CASPA 2025.

In order to create pupil records in CASPA 2024 for the cohort of pupils on roll in Summer 2024, please refer initially to the guidance that will be displayed immediately after the 'Welcome to CASPA' dialog that you will see when you first log in to CASPA 2024, which needs to be read in conjunction with the additional information below specific to the means by which you maintain pupil records in CASPA.

Additional guidance for SIMS Users:

Please follow the standard guidance for information on how to import the CASPA Pupil Data 2024 Report Definition file into SIMS .net. Once this has been done, please proceed as follows: Firstly, log in to SIMS. If SIMS was already open, please shut down and restart SIMS .net. Via the menu options in SIMS .net, select the following:

- **Reports | Design report**, and click the 'Open' button
- In the 'Open report' dialog, select **Focus | Student** and in the list of reports, select 'CASPA Pupil Data 2024' and click 'OK'
- Under 'Refine Data Area', in the dropdown menu below the heading 'My report is based on Student', select 'On Roll'
- Under 'Report Summary', double click on 'Effective on'
- Under 'Specify Effective date', tick 'Use Effective Date' and select a date during Summer 2024 to provide details for all pupils who were on roll during that term; please ensure that the date you select is before the leaving date used for leavers at the end of Summer 2024.
- Click 'Finish', select 'Run my report' and click 'OK' to run the report
- When SIMS reports 'Caspa Pupil Data 2024.xml has been created', you have successfully exported pupil data from SIMS .net

Now log in to CASPA 2024, from the **File** menu, select **Refresh pupil data from SIMS .net export file** and follow on-screen instructions. Please check the data that CASPA displays during the import very carefully (including year groups) to ensure the correct data for the 2023/2024 academic year is being imported. During the import process, CASPA will detect that pupils continuing on roll from the 2022/2023 academic year have changed year groups, etc., and will ask you to confirm that this is because the pupil data being imported is for a new academic year, i.e. that you have 'rolled forward' in your MIS. You must confirm that this is the case.

Additional guidance for users of an MIS other than SIMS .net:

Please create a full Common Transfer File (CTF) from your school MIS, based on a date during the Summer term 2024 to provide details for all pupils who were on roll during that term; please ensure that the date you select is before the leaving date used for leavers at the end of Summer 2024.

Now log in to CASPA 2024, from the **File** menu, select **Refresh pupil records from Common Transfer File** and follow on-screen instructions. Please check the data that CASPA displays during the import very carefully (including year groups) to ensure the correct data for the 2023/2024 academic year is being imported. During the import process, CASPA will detect that pupils continuing on roll from the 2022/2023 academic year have changed year groups, etc., and will ask you to confirm that this is because the pupil data being imported is for a new academic year, i.e. that you have 'rolled forward' in your MIS. You must confirm that this is the case.

Additional guidance for users with no MIS:

- **If you update pupil details manually:**

Rolling forward is achieved by selecting the menu option **Data | Advanced tasks | Roll data forward to new academic year**. Running this option will first display the 'Identify leavers' dialog which will allow you to identify pupils who left your school at the end of the Summer term 2023. Once you have identified all leavers, a NC year value for the new academic year will be automatically set for all pupils remaining on roll, presuming that each pupil will be promoted by one NC year. If necessary, you can modify these values using the Basic pupil data entry screen.

You can now add records for pupils who arrived in your school during the 2023/2024 academic year.

- **If you update pupil details by importing from a CSV:**

Please create a CSV file that represents **only** the cohort who were on roll in Summer 2024, in accordance with the specification available via the menu option **Help | Reference** in CASPA 2024.

Now log in to CASPA 2024 and, from the **File** menu, select **Refresh pupil records from**

Comma Separated Variable File and follow on-screen instructions. Please check the data that CASPA displays during the import very carefully (including year groups) to ensure the correct data for the 2023/2024 academic year is being imported. During the import process, CASPA will detect that pupils continuing on roll from the 2022/2023 academic year have changed year groups, etc., and will ask you to confirm that this is because the pupil data being imported is for a new academic year, i.e. that you have 'rolled forward' in your MIS. You must confirm that this is the case.

Step 4: Recording assessment data for Summer 2024 in CASPA 2024

If pupil records for Summer 2024 have been created in CASPA 2024 then, as part of this process, the assessment results for Summer 2023 and targets for Summer 2024 recorded in CASPA 2023 will have been 'carried forward' to CASPA 2024 as the start values for the 2023/2024 academic year for pupils remaining on roll in 2023/2024.

Just as you did in Step 1, results and targets should now be entered manually into CASPA 2024 or imported from a wide range of electronic sources; for further information, refer to the appropriate guidance note available via the menu option **Help | Guidance notes**.

Step 5: Updating from CASPA 2024 to CASPA 2025

Before updating to CASPA 2025, please ensure any CASPA guidance notes you may have opened are closed, in order that they can be updated.

To carry out the update from CASPA 2024 to CASPA 2025, go to the following web page and follow the instructions provided. Once complete, return to this document again and proceed to the next step.

<http://www.sgasystems.co.uk/caspa/updates/manual/CaspaUpdate2500.htm>

Step 6: Creating pupil records in CASPA 2025

When you reach the 'Welcome to CASPA 2025' screen, please stop and read the message, and follow the instructions given to refresh your basic pupil data, effectively repeating Step 3 above, but this time for the pupils who were on roll in the summer term 2025.

Once again, please check the data that CASPA displays during the import very carefully to ensure the correct data (including year groups) for the 2024/2025 academic year is being imported. This process will also identify your leavers at Summer 2024 and the new intake for Autumn 2024.

Following the successful refresh of basic pupil data, CASPA 2025 will be fully enabled.

Step 7: Recording assessment data for Summer 2025 in CASPA 2025

If pupil records for Summer 2025 have been created in CASPA 2025 then, as part of this process, the assessment results for Summer 2024 and targets for Summer 2025 recorded in CASPA 2024 will have been 'carried forward' to CASPA 2025 as the start value for the 2024/2025 academic year for pupils remaining on roll in 2024/2025.

Just as you did in Step 1, results and targets can be entered manually into CASPA 2025 or imported from a wide range of electronic sources; for further information, refer to the appropriate guidance note available via the menu option **Help | Guidance notes**.

Step 8: Updating from CASPA 2025 to CASPA 2026

Before updating to CASPA 2026, please ensure any CASPA guidance notes you may have open are closed, in order that they can be updated.

To carry out the update from CASPA 2025 to CASPA 2026, select **System | Check for updates**, and follow on-screen guidance.

Step 9: Creating pupil records in CASPA 2026

When you reach the Welcome screen in CASPA 2026, please stop and read the message, and follow the instructions given to refresh your basic pupil data. Since your CASPA installation is now up to date, follow the instructions in the guidance note exactly to create an export from your MIS for current-year pupils. This process will also identify your leavers at Summer 2025 and the new intake for Autumn 2025.

Step 10: Recording assessment data for autumn 2025 in CASPA 2026

If pupil records for Summer 2025 have been created in CASPA 2025 then, as part of this process, the assessment results for Summer 2025 and targets for Summer 2026 recorded in CASPA 2025 will have been 'carried forward' to CASPA 2026 as the start value for the 2025/2026 academic year for pupils remaining on roll in 2025/2026.

Just as you did in Step 1, results (including baseline assessments in the autumn term) and targets can be entered manually into CASPA 2026 or imported from a wide range of electronic sources; for further information, refer to the appropriate guidance note available via the menu option **Help | Guidance notes**.

Option 2. Update CASPA to CASPA 2026 without adding records for intermediate years

As noted previously, if you apply this option, you will not have the option to carry out analysis for pupils who left in summers 2024 or 2025 as CASPA will know only about pupils who were on roll each year you used CASPA up to summer 2023 and then in the current academic year. The update cannot be 'undone' once carried out so please be sure that this is your preferred option prior to carrying out the following steps.

Step 1: Update from CASPA 2023 to CASPA 2026

Before updating to CASPA 2026, please ensure any CASPA guidance notes you may have open are closed, in order that they can be updated.

To carry out the update from CASPA 2023 to CASPA 2026, select **System | Check for updates**, and follow on-screen guidance.

Step 3: Creating pupil records in CASPA 2026

When you reach the Welcome screen in CASPA 2026, please stop and read the message, and follow the instructions given to refresh your basic pupil data.

Following the successful refresh of basic pupil data, CASPA 2026 will be fully enabled.

Step 4: Recording assessment data for autumn 2025 in CASPA 2026

Results (including baseline assessments in the autumn term) and targets can be entered manually into CASPA 2026 or imported from a wide range of electronic sources; for further information, refer to the appropriate guidance note available via the menu option **Help | Guidance notes**.

Option 3. Start afresh with a new installation of CASPA 2026

This option will result in an entirely new CASPA 2026 installation with no data brought forward from your previous CASPA 2023 installation and with no simple way to migrate data from the old to the new installation. Continue with this option only if this is understood as you will start with an empty CASPA 2026 installation and will then go on to populate it with pupil and assessment data for your current on-roll cohort.

Step 1: Install CASPA 2026

Please go to the following web page and follow the supplied for guidance for installing CASPA 2026.

<http://www.sgasystems.co.uk/caspa/setups/caspainstaller.htm>

Step 2: Creating pupil records in CASPA 2026

When you reach the Welcome screen in CASPA 2026, please stop and read the message, and follow the instructions given to refresh your basic pupil data.

Following the successful refresh of basic pupil data, CASPA 2026 will be fully enabled.

Step 3: Recording assessment data for autumn 2025 in CASPA 2026

Results (including baseline assessments in the autumn term) and targets can be entered manually into CASPA 2026 or imported from a wide range of electronic sources; for further information, refer to the appropriate guidance note available via the menu option **Help | Guidance notes**.

3. Next Steps:

You are now ready to record assessment results, targets, evidence and notes using CASPA 2026.

You can immediately record results and targets for the new academic year. For example, any baseline assessments can be entered, and you can use CASPA to not only record the output of target setting activities, but also to inform and support you during your target setting (see guidance note **Help | Guidance notes | Using CASPA to inform target setting**).

It is worth noting that, having effectively 'jumped' to CASPA 2026, there are many enhancements to CASPA that you will not yet have experienced. For further information on these, please refer to CASPA's Help system (**Help | Contents**) for the 'What's new' pages.