Updating to CASPA 2019 for users of a CASPA 2018 School Module

Introduction:

This document summarises the relevant procedures for updating to CASPA 2019 for existing users of CASPA 2018.

You should only use this document if you are currently using CASPA 2018.

1. Options

In most cases, users will have an up to date CASPA 2018 installation. In more rare cases, the data in CASPA 2018 may be woefully out of date, or perhaps a completely empty CASPA 2018 installation may be considered for update to CASPA 2019. You therefore have the following options:

1. If you have an up to date CASPA 2018 (all pupils on roll in summer 2018 exist in CASPA, along with their summer 2018 results and correct targets for summer 2019 where entered, go directly to Step 3 in Section 2 below
2. If your CASPA 2018 installation is populated, but you are uncertain about how up to date it is, go to Step 1 in Section 2 below
3. If your CASPA 2018 is completely empty, or was previously an earlier CASPA version (eg CASPA 2017) but has not been populated with pupil records since updating to CASPA 2018, you have two options:
   • Populate CASPA 2018 with pupil records, and then results for summer 2018 and possibly earlier. In this case, go to Step 1 in Section 2 below
   • Update without populating CASPA. If you take this option, please be aware that although you can enter historic data for pupils on roll in the 2018/2019 academic year, you will never be able to record summer 2018 results and analyse progress for pupils who left your school in summer 2018, and the 'Set effective year' option will not be available for any year for which pupil records were not recorded This additional data can be of particular value during end of Key Stage analysis where, for example, the previous year's leavers represent those who completed a Key Stage. If you decide to update directly to CASPA 2019 without recording pupil details in CASPA 2018, go to Step 3 in Section 2 below

2. Update from CASPA 2018 to CASPA 2019

Step 1: Confirming accuracy of pupil records in CASPA 2018

Check that the Basic pupil data in CASPA 2018 is correct and reflects the pupils who were on roll in summer term 2018 via the **Data | CASPA assessment data** page.

If the pupils who were on roll in summer 2018 all exist and critical roll-forward data such as Year Groups are correct in CASPA 2018, please go to **'Step 2: Confirming accuracy of summer 2018 assessment data in CASPA 2018'** below.

If pupils who were on roll in summer 2018 are missing or critical roll-forward data such as Year Groups are incorrect, you need to refresh or create pupil records in CASPA 2018 for the cohort of pupils on roll in Summer 2018. Please refer initially to **Help | Guidance** notes selecting the note specific to your configuration with the title starting 'Transferring basic pupil data for...' 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 2018 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 2018' 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 2018 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 2018.
- Click 'Finish', select 'Run my report' and click 'OK' to run the report
- When SIMS reports 'Caspa Pupil Data 2018.xml has been created', you have successfully exported pupil data from SIMS .net

Now log in to CASPA 2018, 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 2017/2018 academic year is being imported.

If no records previously existed for the 2017/2018 year, during the import process, CASPA will detect that pupils continuing on roll from the 2016/2017 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 2018 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 2018.

Now log in to CASPA 2018, 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 2017/2018 academic year is being imported.

If no records previously existed for the 2017/2018 year, during the import process, CASPA will detect that pupils continuing on roll from the 2016/2017 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:**

  If your data is not already rolled forward to the 2017/2018 academic year, you will first need to carry out the next step. 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 2017. 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 2017/2018 academic year or update details via the menu option **Data | Basic pupils data**.

- **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 2018, in accordance with the specification available via the menu option **Help | Reference** in CASPA 2018

    Now log in to CASPA 2018 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 2017/2018 academic year is being imported.

    If no records previously existed for the 2017/2018 year, during the import process, CASPA will detect that pupils continuing on roll from the 2016/2017 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 2: Confirming accuracy of summer 2018 assessment data in CASPA 2018

Updating to CASPA 2019 will cause assessment results for Summer 2018 and targets for Summer 2019 recorded in CASPA 2018 to be 'carried forward' to CASPA 2019 as the start value for the 2018/2019 academic year for pupils remaining on roll in 2018/2019. 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 the summer term 2018.

Please note that values recorded in the 2019 target fields that are CASPA-generated levels which have not been amended or 'verified' (will be displayed in a red font) will not be carried forward. See the guidance note 'Using CASPA to information target setting' for more information about amending and verifying CASPA-generated levels.

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 2018 results if CASPA 2018 is up to date. If not, you are advised to update these at this stage.

Results and targets can be entered manually into CASPA 2018 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 3: Updating from CASPA 2018 to CASPA 2019

Before updating to CASPA 2019, 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 2018 to CASPA 2019, select **System | Check for updates**, and follow on-screen guidance. Please note that you must have adequate network privileges in order to update CASPA.

Step 4: Creating pupil records in CASPA 2019

When you reach the Welcome screen in CASPA 2019, please stop and read the message, and follow the instructions displayed to refresh your basic pupil data. Follow the instructions in the guidance note exactly to create an export from your MIS for current-year pupils. The import process will identify your leavers at Summer 2018 and the new intake for Autumn 2018.

Relevant assessment results for Summer 2018 (called 'Current result' in CASPA 2018) and targets for Summer 2019 recorded in CASPA 2018 will be 'carried forward' to CASPA 2019 as the start value for the 2018/2019 academic year for pupils remaining on roll in 2018/2019.

3. Next Steps:

You are now ready to make use of CASPA 2019's features.

You can immediately record results and targets for the new academic year. For example, baseline assessments for your new admissions 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**).

For further information on what is new in CASPA 2019, and previous major releases, please refer to CASPA's Help system (**Help | Contents**) for the 'What's new' pages.