

RM Integris - Statutory Assessments

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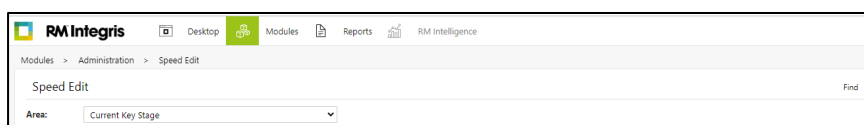
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Pre-assessment checks required prior to assessment data entry

Before you begin to enter any assessment data, please update the following items

Current Key Stage

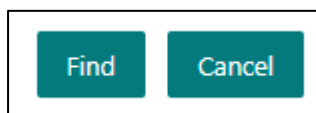
Step 1) In Modules, go to **Administration > Speed Edit**, and from the **Area** drop down list, select **Current Key Stage**.



Step 2) Click on **Find**, and choose the first year group for whom you will be completing an end of Key Stage Assessment (Reception for EYFS, Y6 for KS2)

Roll Status:	Current
Year Group:	Reception
Class:	--n/s--
House:	--n/s--
Gender:	--n/s--
NC Year:	--n/s--

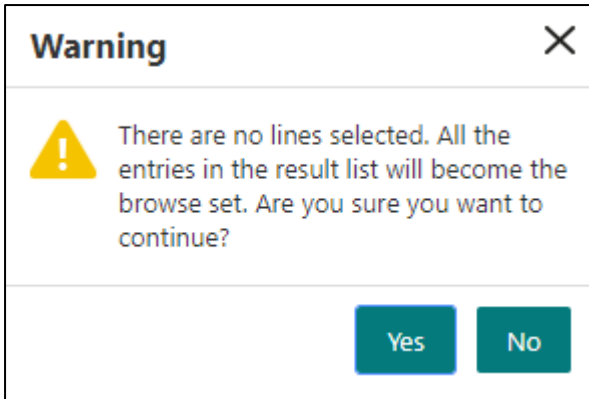
Step 3) Click on **Find**



Step 4) Click on **Select**



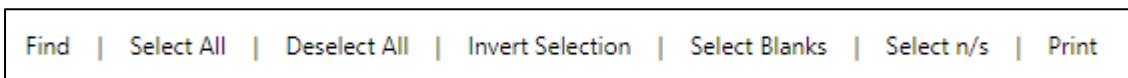
Step 5) Click on **Yes** to show all pupils



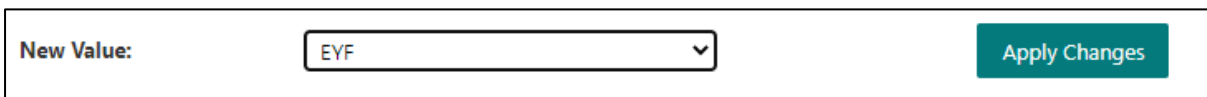
Step 6) Check the column headed '**Value**' to make sure that it is showing the correct Key Stage for this year group – in the example below, these pupils are all in reception and the correct Key Stage should be EYF

Value
EYF
EYF

Step 7) If any of the pupils are in the wrong year, click on **Select All** (next to **Find** – top of the screen). All pupils will be highlighted in blue



Step 8) Click on the drop down list next to **New Value**, and select the correct year. Then **Apply Changes**



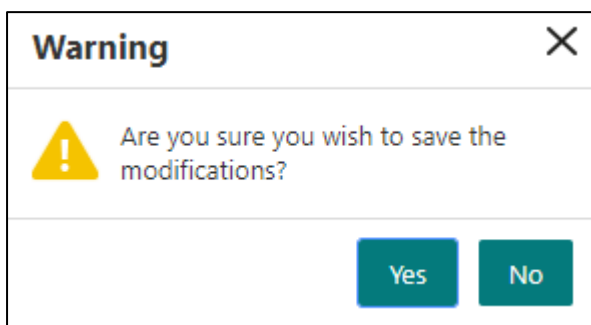
Step 9) The letter 'M' will appear in the 'Status' column to show that the update has happened

Value	Status
EYF	M
EYF	M
EYF	M

Step 10) Click on **Save**.



Step 11) Click **Yes** to the Warning – Are you sure you wish to save the modifications?



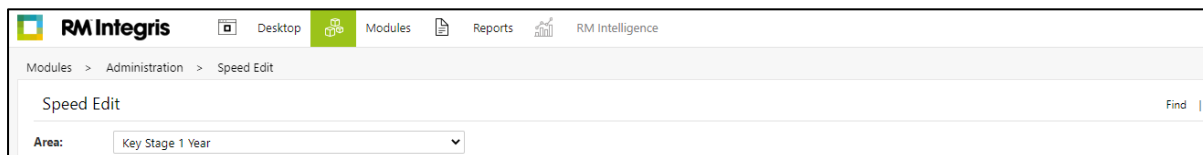
Step 12) Click **Exit**



Step 13) Repeat all steps for every year group being assessed in the current academic year.

Key Stage Year

Step 1) In Modules, go to **Administration > Speed Edit**, and from the **Area** drop down list, select the first key stage that you will be entering results for – in this example **Key Stage EYF Year**. Then click on **Find**.



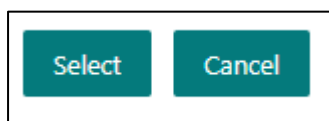
Step 2) Select the Year Group appropriate to the Key Stage – in this EYFS example enter 'reception' in the Year Group field

Roll Status:	Current	▼
Year Group:	Reception	▼
Class:	--n/s--	▼
House:	--n/s--	▼
Sex:	--n/s--	▼
NC Year:	--n/s--	▼

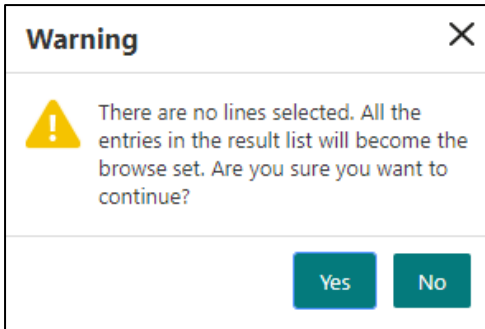
Step 3) Click on **Find**



Step 4) Click on **Select**



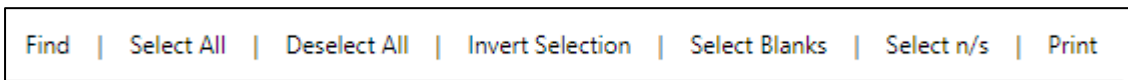
Step 5) Click on **Yes** to display all the pupils.



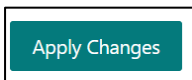
Step 6) Check that the year in the '**Value**' column is set to the current year



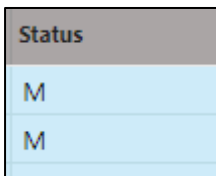
Step 7) If the current year is not showing then click on **Select All** (next to **Find** – top of the screen) - all pupils will be highlighted in blue.



Step 8) From the drop-down list in **New Value** select the current year, click on **Apply Changes**



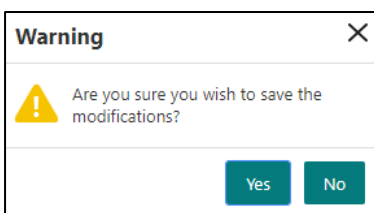
Step 9) The letter 'M' will appear in the 'Status' column to show that the update has happened



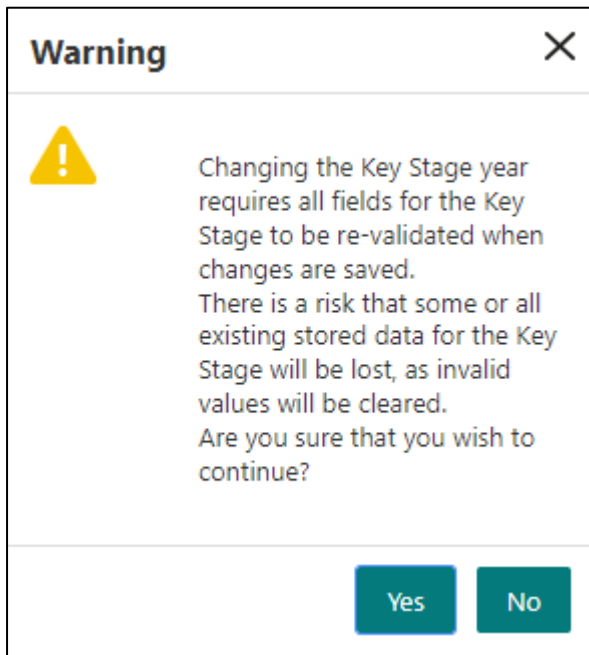
Step 10) Click on **Save**



Step 11) Click on **Yes** to the first warning



Step 12) Click **Yes** to the second warning



Step 13) Click on **exit**



Step 14) Repeat this for every Key Stage that you are going to complete - depending on your school type, the options are:

- Key Stage 2 year (year 6)
- Key Stage EYF year (year reception)
- Phonics check year (year 1). NOTE: The Phonics check year for Y2 retakes should remain set at the previous year (2023).

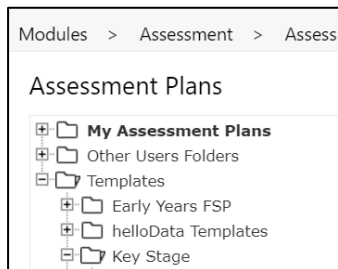
Set up Markbooks

Step 1) In the **'Modules'** tab, select **Assessment > Assessment Planning**.

Click on the '+' to expand **Templates**

Click on the '+' to expand **Key Stage**

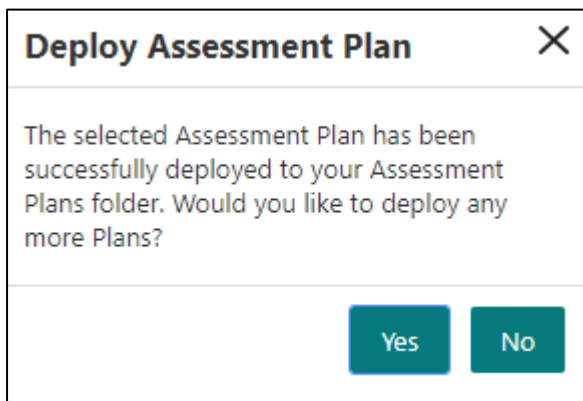
Click on the '+' to expand **2024**



Step 2) Highlight the relevant Key Stage, and click on **Deploy**

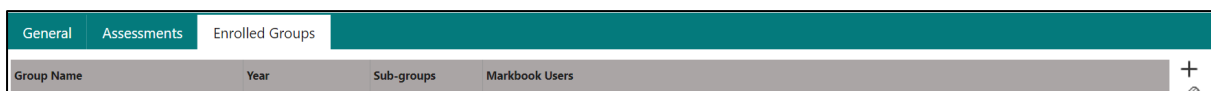


Step 3) This will move the selected Assessment Plan to **'My Assessment Plans'**, if you need further Key Stages, select **'Yes'** at the prompt, and repeat the process until you have all relevant Key Stages saved in My Assessment Plans.



Step 4) Click the plus sign to expand **My Assessment Plans > Key Stage > 2024** if it is not already open. Select the relevant assessment plan and click on the **Edit an Assessment Plan** icon (pencil icon)

Step 5) Select the **Enrolled Groups** tab and click on the **Add an enrolled group** icon (plus sign)



Step 6) Open the drop down list in the 'Enrolled Group Type' window. Select **Year Group** and highlight the relevant year (for example, Reception for EYFS, Y1 for Phonics, Y2 for Phonics retakes, Y6 for KS2).

Enrolled Group Type: Year Group

Year Groups:

Name
Not Specified
N2
1
2
3
4
5
6

Add Close

Step 7) Click on 'Add', then 'Close'. The Year Group will disappear from the list, and appear on the next screen.

Step 8) Click on the group to highlight it. Click on the **Add Markbook Users** icon (fourth icon down on the right)



Step 9) A list of users will appear, select yourself and/or any other user who will be entering data in the markbook. Click **OK**.

Add Markbook Users

Select one or more users and click on OK to add them as Markbook Users.

Surname	Known Name	Staff Code	Staff Type
ADMIN	ADMIN	ADM	Not Specified
COORDINATOR9001	ASSESSMENT	ASMCRD	Not Specified
LA	LA	SYS	Not Specified
Peters	Debbie		Teacher

OK Cancel

Step 10) Your selections will appear as Markbook Users against the Year Group on the next screen.

Markbook Users
Not Specified ASSESSMENT COORDINATOR9001, Miss Debbie Peters

Step 11) Click on **Save**

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
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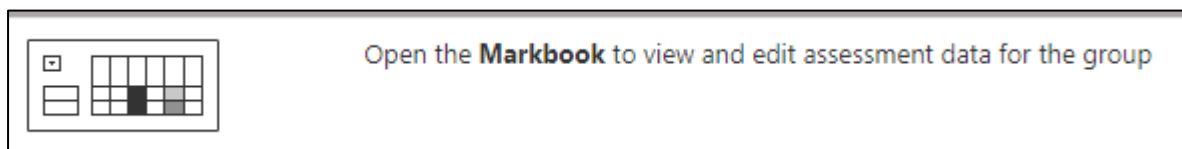
Step 12) Repeat steps 4 to 11 for all other Assessment Plans. See [Appendix B](#) on how to create a Phonics yr2 retake group and then [part b](#) of Appendix B on how to add this group to the Assessment Plan



Enter assessment data into markbooks

Step 1) Select **Modules > Assessment > Markbook**. Click the '+' to expand **My Markbooks** and click to highlight the relevant markbook.

Step 2) Click on the **Open the Markbook** button



Step 3) The next screen will show a collapsed view of the selected Key Stage. To start entering data, click on the plus sign against the required subject. This will expand the subject to show all the elements, as seen in the EYFS example below.

Apply Filter... Show...	Co...		Phy...		PSED		Literacy		Mat...		UndThe...		Expr...				
	ListenAttenUnderst	Speaking	Gross Motor	Fine Motor	Self Regulation	ManageSelf	Relationships	Comprehension	WordReading	Writing	Number	NumericalPaterns	PastPresent	PeopleCultureComm	NaturalWorld	CreateWithMaterials	ImaginativeExpressiv
Name																	
Abee, Ann	1	2	2	1	1	1	1										

To see a full description of what should be entered into each column, hover the mouse over the column header.

Table showing Teacher Assessment Columns to complete for each Key stage

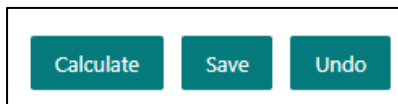
Key Stage	guidance
EYFS	all columns except for final section of three (Learning Charactr)
Phonics	first column –KS1 Pho Mark (numerical score) (second column updated with WA/WT when threshold is known)
Key Stage 2	<p><i>NB: For reading and maths, schools are no longer required to assess children who have been entered for the Key Stage 2 tests, the only categories that may be awarded are PK1–PK6 and EM.</i></p> <p>English reading - first column only if pupil has <u>not</u> been entered for Key Stage 2 tests</p> <p>English writing – second column needs completing for all KS2 pupils</p> <p>Mathematics – first column only if pupil has <u>not</u> been entered for Key Stage 2 tests</p> <p>Science – first column needs completing for all KS2 pupils</p>



Further guidance on valid codes can be found on the [Statutory Assessments SIP page](#)

Step 4) Enter the assessment data into each cell. Data can be typed in, or double clicking on a cell will produce a list of valid values from which to choose. Invalid data will be outlined in red and must be corrected.

Step 5) Click on **Save** at regular intervals, and when you have finished entering data, click on **Save** again.



Step 6) Click on the **Back** button to leave this screen



Please see [Appendix A](#) for instructions on how to print out a blank markbook to collect the results from the teachers



Sending Assessment Data to the Local Authority/Standards and Testing Agency

Step 1) In the 'Modules' tab, select **Administration > Import & Export > Key Stage Exports**

Please select the Import/Export Utility that you require from the list below:

Admission Transfer File (ATF)
Children Missing Education Export
CTF Export
CTF Import
Key Stage Exports
Pupil Premium Import

Step 2) Click on **Key Stage Exports**, then choose the appropriate Key stage and year from the list that appears.

Export Wizard

Welcome to the K

- Early Years Four
- Phonics Export
- Key Stage 1 Exp
- Key Stage 2 Exp
- Key Stage 3 Exp

Step 3) Click on **Next**



Step 4) From the next screen, click on the **Add Students** button (plus sign) and use the **Student find** screen to select the appropriate year group.

Roll Status:	Current	▼
Year Group:	Reception	▼
Class:	--n/s--	▼
House:	--n/s--	▼
Sex:	--n/s--	▼
NC Year:	--n/s--	▼

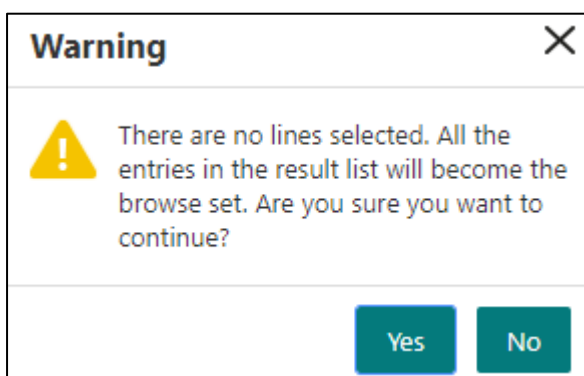
Step 5) Click on **Find**



Step 6) Click on **Select**



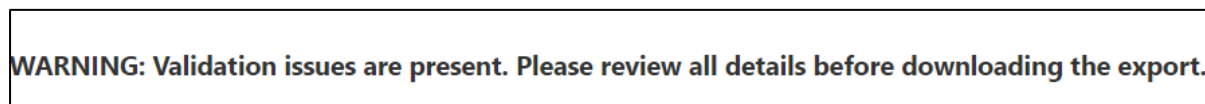
Step 7) Click on **Yes** to show all pupils



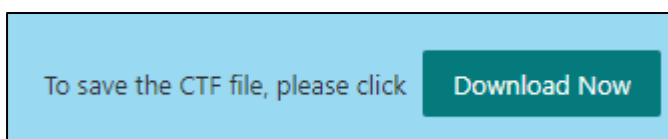
Step 8) Click on **Next**.



Step 9) An 'Export Summary' will appear. Please check for any 'WARNINGS' or errors, and correct them – it may not be possible to complete the export if errors remain. Use the scroll bar on the right of the screen to check error details. The screen will look similar to the one below.



Step 10) If you've cleared all the errors then click on the Download now button. This button may not appear if you still need to correct some errors.



Step 11) Save your file to a location of your choosing

Step 12) Your exported CTF will be zipped, and will need to be unzipped before uploading to s2s or the STA Primary Assessment Gateway (PAG).

Step 13) Upload your EYFS and Phonics to the Secure Transfer Website (s2s), and your Key Stage 2 TAs directly to the STA Primary Assessment Gateway (PAG)

S2S (through the DfE Sign-In website)
STA Primary Assessment Gateway

[https://services.signin.education.gov.uk/
Sign In \(education.gov.uk\)](https://services.signin.education.gov.uk/SignIn(education.gov.uk))

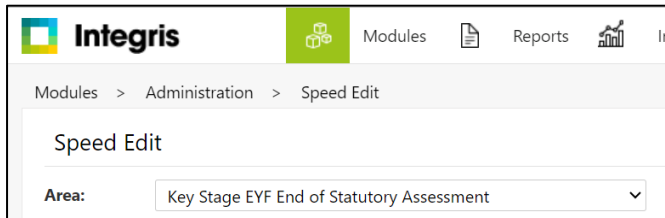
Please note that you should send Y1 Phonics and Y2 Phonics retakes in one CTF – see [Appendix B](#) for instructions on setting up an ad-hoc group for the Y2 pupils who are retaking the Y1 Phonics screening check.



Running Key Stage Reports

Pre-report checks

Step 1) Before you run any Key Stage reports, please update the following item in Speed Edit **End of Statutory Assessment** indicator. In Modules, go to **Administration | Speed Edit**, and from the **Area** drop down list, select **Key Stage <_> End of Statutory Assessment**.



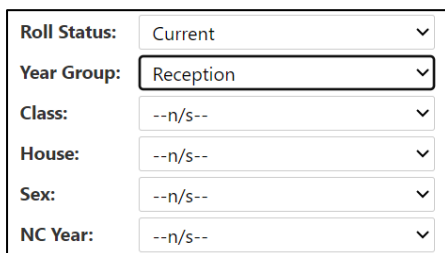
The screenshot shows the Integris software interface. At the top, there is a navigation bar with 'Integris' logo, 'Modules', and 'Reports' icons. Below this, a breadcrumb trail reads 'Modules > Administration > Speed Edit'. The main content area is titled 'Speed Edit' and features a dropdown menu labeled 'Area' with the selected option 'Key Stage EYF End of Statutory Assessment'.

Step 2) Click on **Find**



The screenshot shows a horizontal toolbar with several buttons: 'Find', 'Select All', 'Deselect All', 'Invert Selection', 'Select Blanks', 'Select n/s', and 'Print'. The 'Find' button is highlighted with a red box.

Step 3) Choose the appropriate year group who have reached the end of a Key Stage Statutory Assessment (for example Reception for EYFS, Y6 for KS2 – this does not apply to Phonics)



The screenshot shows a filter selection form with the following fields and values: 'Roll Status' set to 'Current', 'Year Group' set to 'Reception', 'Class' set to '--n/s--', 'House' set to '--n/s--', 'Sex' set to '--n/s--', and 'NC Year' set to '--n/s--'. Each field has a dropdown arrow on the right.

Step 4) Click on **Find**



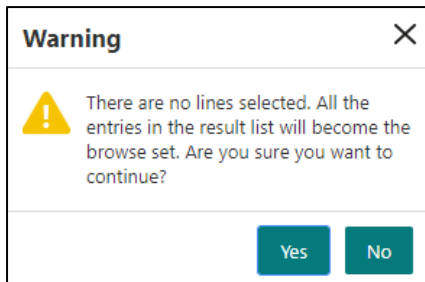
The screenshot shows two buttons: 'Find' and 'Cancel'. The 'Find' button is highlighted with a red box.

Step 5) Click on **Select**

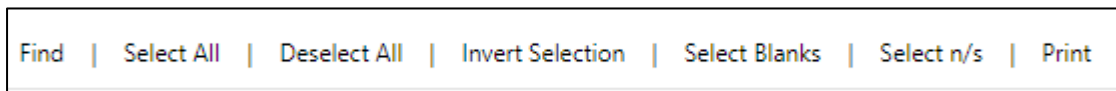


The screenshot shows two buttons: 'Select' and 'Cancel'. The 'Select' button is highlighted with a red box.

Step 6) Click on **Yes** to show all pupils.



Step 7) On the next screen, the column to check is the one headed **Value**. All pupils should have a **'Yes'** against them. If not, click on **Select All**



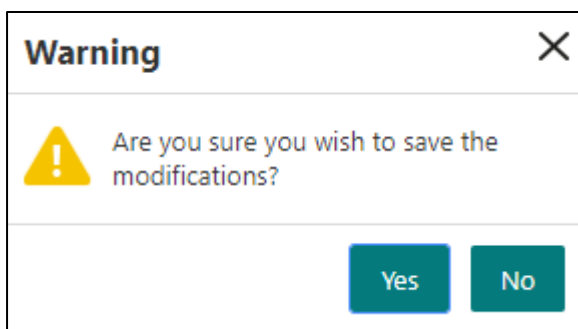
Step 8) Then click the **New Value** box, bottom left. Click on **Apply Changes**



Step 9) The letter 'M' will appear in the status column. Click on **Save**



Step 10) Click on **Yes**



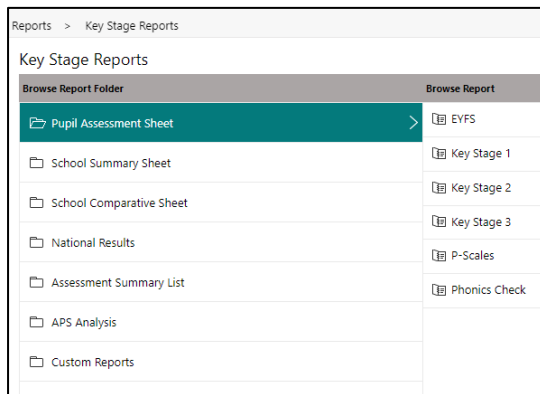
Step 11) All pupils should now have a **Yes** in the Value column. Click on **exit**



Step 12) Repeat for all Key Stage Year Groups

create reports

Step 1) In the **Reports** tab, select **Key Stage Reports**

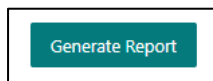


Most commonly used reports are the following:

Pupil Assessment Sheet	Reports for individual pupils
School Summary Sheet	Percentage of pupils achieving each level
School Comparative Sheet	Percentage of pupils achieving each level school vs National (2023)

But others may be useful for school analysis purposes.

Step 2) Select the Report and Key Stage you require. The report will automatically include all pupils whose Assessment Year is set to 2024, and who have been flagged as being at the end of statutory assessment. Click on **Generate Report**



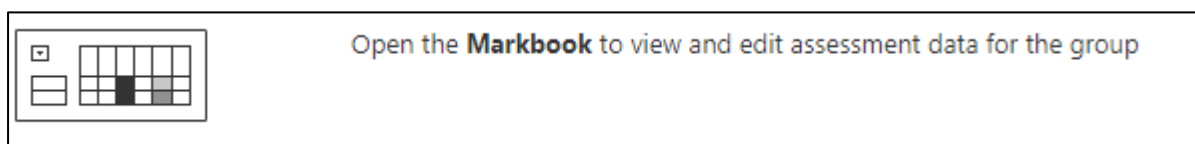
IMPORTANT NOTE 1: Please remember to import your Key Stage 2 Test Results BEFORE printing off the individual pupil reports!

IMPORTANT NOTE 2: Ensure that the Phonics outcome is showing on the markbook . If not, then the Phonics reports won't have this data to report on.

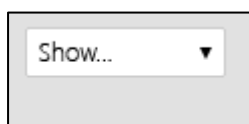
Appendix A: Printing a markbook

If you need to print off a paper copy of a markbook – for example; a blank grid for teachers to complete, or a print out of the data for checking – please follow the steps below after you have completed the [initial Markbook set up](#).

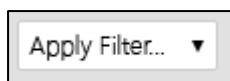
Step 1) In **Modules | Assessment | Markbook**, click on the plus sign next to **My Markbook**, highlight the relevant Key Stage, and click on the **Open a Markbook** icon



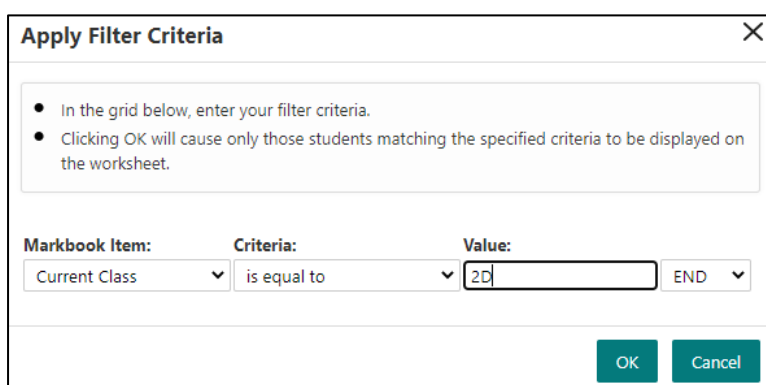
Step 2) To print a separate Markbook for each class, when the Markbook opens, select **Current Class** from the drop down list in the **Show** box, top left of the screen. This will display an extra column on the left hand side of the marksheet showing the pupils' current class.



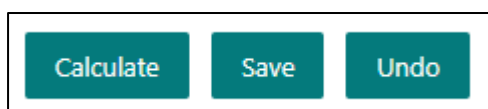
Step 3) Click on **Apply Filter**



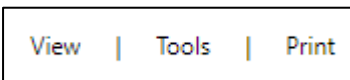
Step 4) From the dropdown list in 'Markbook Item' choose Current Class. Choose one class at a time to enter in the Value box and click on **OK** to apply the filter



Step 5) Click on **Save**



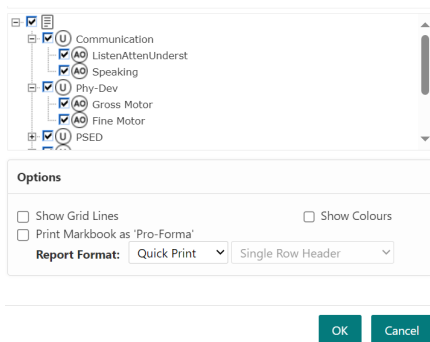
Step 6) The pupil list will now only show the pupils for the class you have filtered on. Click on **Print**



Step 7) The **Assessment Item Selection** box appears, below is the EYFS example. Different subjects within the key stage are shown in a collapsed view and are expanded by clicking on the plus icon. A tick in the subject box means that ALL the elements within that subject are automatically selected. Clicking on the tick in the subject box will de-select all the elements enabling you to choose which you want to print.

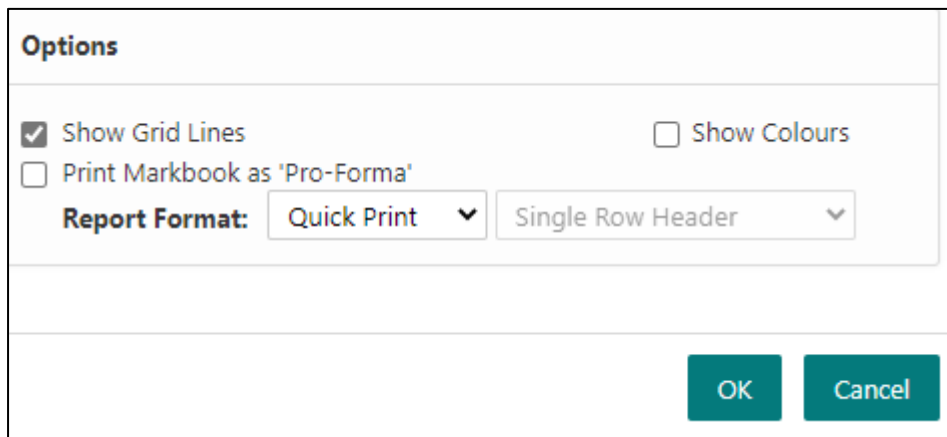
'AO' (Assessment Opportunity) means that data can be entered

'CC' (Calculated Cell) means data cannot be entered and the value will be calculated from data entered in the other cells.



Step 8) Select the elements that you need to print.

Step 9) Select **Show Grid Lines** and leave the default report format 'Quick Print'. Click on **OK**



Step 10) These selections will produce a grid which will be blank for teachers to complete if no data has been entered. Click on the **print** symbol



Step 11) Another option is to select 'Excel' as the Report Format in step 9 which enables you to manipulate such things as column width and cell size in the printed output.

Options

Show Grid Lines Show Colours

Print Markbook as 'Pro-Forma'

Report Format: Excel Single Row Header

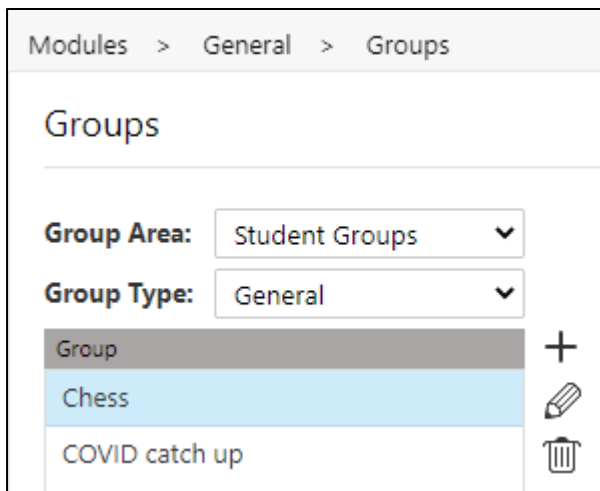
OK Cancel



APPENDIX B: Creating an Ad-hoc group for Y2 Phonics re-take pupils

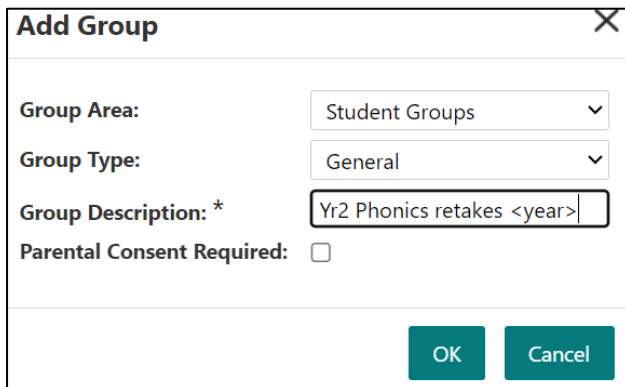
Create an Ad-hoc group

Step 1) Select **Modules | General | Groups**. Make sure that the **Group Area** says **Student Groups**, and choose '**General**' from the **Group Type** drop down list. Click on the **Add Group** icon (plus sign) in the Group box to create a new group



The screenshot shows a web interface for managing groups. At the top, there is a breadcrumb trail: "Modules > General > Groups". Below this, the title "Groups" is displayed. There are two dropdown menus: "Group Area" set to "Student Groups" and "Group Type" set to "General". Below these is a list of existing groups: "Group", "Chess", and "COVID catch up". To the right of the list are three icons: a plus sign (+) for adding a new group, a pencil for editing, and a trash can for deleting.

Step 2) In the next screen, give the new group an appropriate title. Click **OK**. The newly created group will now appear in the Groups box.



The screenshot shows a dialog box titled "Add Group" with a close button (X) in the top right corner. It contains the same "Group Area" and "Group Type" dropdowns as the previous screen. Below them is a "Group Description: *" text input field containing "Yr2 Phonics retakes <year>". There is also a "Parental Consent Required:" checkbox which is currently unchecked. At the bottom right, there are two buttons: "OK" and "Cancel".

Step 3) Highlight the group you've just created and click on the **Add members** icon (plus sign) in the student(s) box



The screenshot shows a table with the following structure:

Reference	Surname	First Name	Consent

At the top left of the table is the label "Student(s)". At the top right is a plus sign (+) icon. At the bottom right is a trash can icon.

Step 4) From the Student Find screen, select Year 2

Roll Status:	Current	▼
Year Group:	2	▼
Class:	--n/s--	▼
House:	--n/s--	▼
Gender:	--n/s--	▼
NC Year:	--n/s--	▼

Step 5) Then click on **Find**

Find	Cancel
-------------	---------------

Step 6) Then cherry pick the pupils who will be re-taking the Phonics screening check this year – this will be any pupil with a Wt (working towards) level in their Yr2 Phonics test in the Summer 2023 statutory return, or any pupil who did not take part in the screening for any other reason. Use the Control Key to cherry pick from the list of Y2 pupils.

Search Results		
Reference	Surname	Known Name
1494	Adams	Jenny
59	Allen	Chloe
1415	Alsbury	Stephen
26	Bailey	Thomas
1567	Baker	Bobby
63	Bates	Julia
58	Blake	Oscar
68	Brady	Daniel

Step 7) Click on **Select**.

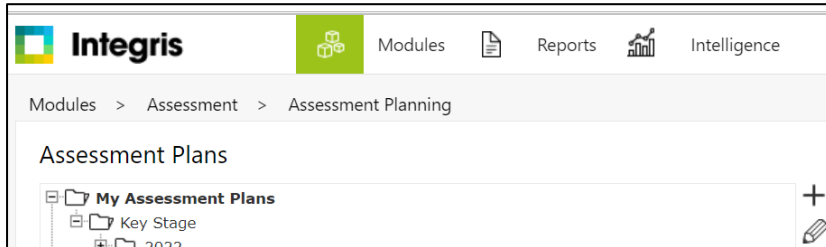
Select	Cancel
---------------	---------------

Step 8) The selected pupils will now appear in the ad-hoc group. This group will now be available as an option to choose when [creating a markbook for Yr2 Phonics retakes](#) or [creating a CTF to export your Phonics results to the LA](#).



Create a Markbook for Y2 Phonics retakes

Step 1) In **Modules | assessment | assessment planning** click the plus sign to expand **My Assessment Plans | Key Stage | 2024** if it is not already open and highlight the **NC Phonics Check 2024** assessment plan. Click on the **Edit an Assessment Plan** icon (pencil)

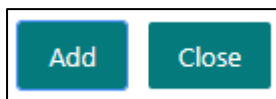


Step 2) Select the **Enrolled Groups** tab, click on **Add an enrolled group** icon (plus symbol)

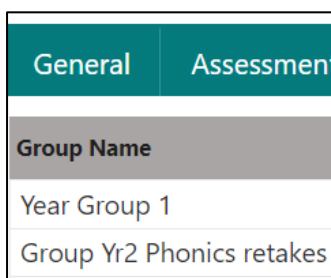


Step 3) In the **Enrolled Group Type** field, select **Student Group** and group type of **General**. Highlight the **Phonics Y2 Retakes <year>** group created earlier. Click on **Add**

Step 4) Click on **Close**.



Step 5) The Group will disappear from the list, and appear on the main screen.



Step 6) Click on the Group to highlight it. Click on the **Add Markbook Users** icon (fourth icon down on the right)



Step 7) A list of users will appear, select yourself and/or any other user who will be entering data in the markbook. Click **OK**.

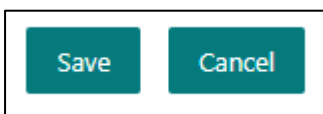
Add Markbook Users ✕

• Select one or more users and click on OK to add them as Markbook Users.

Surname	Known Name	Staff Code	Staff Type
ADMIN	ADMIN	ADM	Not Specified
COORDINATOR9001	ASSESSMENT	ASMCRD	Not Specified
LA	LA	SYS	Not Specified
Peters	Debbie		Teacher

OK Cancel

Step 8) Click on **Save**



Step 9) In **Modules | assessment | markbook** a separate Markbook will now be available for you to enter the Y2 Phonics retakes for <year>.

To use the ad-hoc group when exporting the Phonics CTF

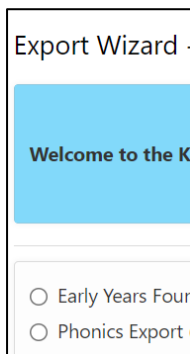
Step 1) Select **Modules > Administration > Import and Export** and choose **Key Stage Exports**



Please select the Import/Export Utility that you require from the list below:

Admission Transfer File (ATF)
Children Missing Education Export
CTF Export
CTF Import
Key Stage Exports
Pupil Premium Import

Step 2) Choose the Phonics Export 2024 option



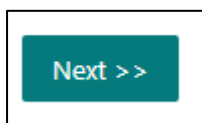
Export Wizard

Welcome to the K

Early Years Four

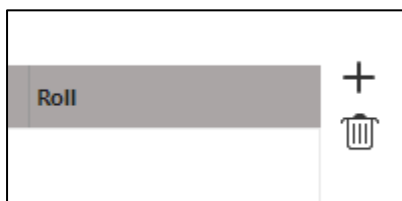
Phonics Export

Step 3) Click on **Next**



Next >>

Step 4) Click on the **Add Students** icon (plus sign)



Roll +

🗑️

Step 5) From the Student find screen, select Y1

Roll Status:	Current	▼
Year Group:	1	▼
Class:	--n/s--	▼
House:	--n/s--	▼
Gender:	--n/s--	▼
NC Year:	--n/s--	▼


Step 6) Click on **Find**

Find	Cancel
------	--------

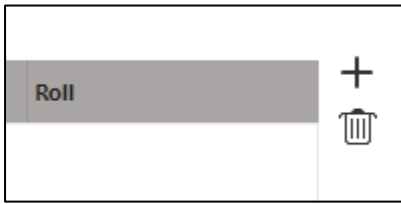
Step 7) Click on **Select**

Select	Cancel
--------	--------

Step 8) Click on **Yes**

Warning ✕	
	There are no lines selected. All the entries in the result list will become the browse set. Are you sure you want to continue?
<input type="button" value="Yes"/> <input type="button" value="No"/>	

Step 9) This will bring through all your Y1 pupils who have taken the Phonics screening check this year. Now click on the **Add Students** icon again.



Step 10) This time, in the Student Find screen, go down to the **Group Type** and **Group** section. Set Group Type to **General**. Pick your Y2 Phonics retake group from the list.

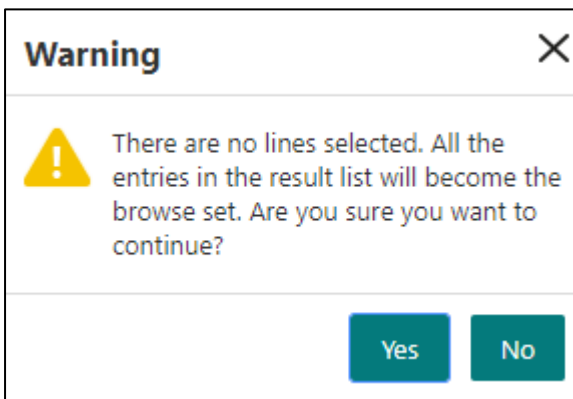
Step 11) Click on **Find**



Step 12) Click on **Select**



Step 13) Click on **Yes**



Step 14) The Y2 re-take pupils will now appear as part of the list of pupils to be exported and you can continue to complete the CTF process