



# A&T Back Office

## Setting Up In Year Transfer Groups

### In Year Transfer Groups

In year transfers are those in which children move from one school to another outside the normal phased transfer times.

To set up a new in year transfer group:

1. Create a transfer group. To do this, either:
  - Select **Process | Transfer Groups | Add New Transfer Group** to create a new transfer group from scratch, or
  - Select **Process | Transfer Groups** and copy an existing transfer group. This method is recommended by Capita One when adding the first in year transfer group, to save time.
2. Add transfer group basic details, or edit copied details.
3. Add coordinating Local Authorities, or edit copied LAs.
4. Define sub groups or edit copied sub groups. See reference guide *RG\_OL\_ATBO\_Transfer Group\_Sub Groups*.
5. Define process periods and record vacancies. See reference guide *RG\_OL\_ATBO\_Process Periods and Vacancies*.
6. Select feeder transfer groups.
7. Add students.

Optional tasks:

- Add **E-Application Settings** if the transfer group is to be made available for online applications. See reference guide *RG\_OL\_ATBO\_Transfer Group\_E-App Settings*.
- Associate tests with transfer groups if test scores are to be used as part of the allocation process. See reference guide *RG\_OL\_ATBO\_Tests*.

### Creating an In Year Transfer Group by Copying an Existing Group

During the copy process the following items are copied to the new transfer group:

- Most of the transfer group basic details.
- All sub groups, the sub group **Special Reason Codes** and sub group **Online Parameters**.
- Feeders.
- Coordinating Local Authorities.
- Most of the **E-Application Settings** information associated with the transfer group (including memo text and the **Online Label** for the transfer group).

The following items are not copied to the new transfer group:

- The setting of the **Use Admission Address** check box in the transfer group basic details.
- Process periods. These are year specific so do not apply to the new transfer year.
- Any sub groups without receivers.
- The **E-Application Settings** dates.

1. Select **Process | Transfer Groups**
2. Select the transfer group that contains the most schools (usually primary schools).
3. Click the grey arrow next to the **Intake NCY** field to display the details panel.
4. Click the **Copy Transfer Group** hyperlink.



A new transfer group is created, with the **Year** field incremented by one.

**NOTE:** The combination of transfer group code and year must be unique. If there is already a transfer group in the next academic year with the same transfer group code as the selected transfer group, then you cannot create a copy.

5. Select the **In Year** check box, amend the **Description** and **Group Code** and make any other appropriate changes to the basic details.
6. Click the **Save** button.
7. Make all other necessary changes for the transfer group as outlined in this reference guide.

### Creating an In Year Transfer Group by Adding a New Group

1. Select **Process | Transfer Groups | Add New Transfer Group**.
2. Follow the steps outlined in **Adding Basic Details** in the reference guide *RG\_OL\_ATBO\_Transfer Group\_Set Up Phased*, noting the following:
  - The **In Year** check box must be selected. This supports students of different ages from multiple NCYs in one transfer group.
  - Intake NCY and Student NCY are not used for in year transfer groups.
3. Click the **Save** button.
4. Make all other necessary changes for the transfer group as outlined in this reference guide.



### Adding Coordinating Local Authorities

1. Select **Process | Transfer Groups | Coordinating LAs**.
2. Enter part or all of the **LA Name** or **LA Number**.
3. Click the **Search** button to display a list of Local Authorities (LAs) meeting the search criterion. Any that have already been added to this transfer group are selected and listed first, followed by the other available Local Authorities. The two sets of LAs are separated by a thick brown line.
  - Click the **Show Available First** hyperlink to move all the LAs that have not yet been selected (but that meet the search criteria) to the top.
  - Click the **Show Selected First** hyperlink to move the selected LAs back to the top of the list.
4. Select or deselect the check boxes to add or remove Local Authorities.
5. Click the **Save** button.

6. If necessary, carry out the search again using different criteria to add more coordinating Local Authorities.

### Adding Feeder Transfer Groups and Students

The in year student selection process is carried out at the beginning of the academic year. It carries the following groups of students forward to the current in year transfer group:

- Home LA students on a waiting list in selected normal phased transfer groups from the previous academic year
- Any students with incomplete, outstanding applications from the previous year's in year transfer groups.

Feeder transfer groups must be selected for in year transfer groups before the **In Year Student Selection** process can be run.

**NOTE:** Before running **Student Selection**, ensure that as many students as possible have a correspondence address with a postcode, unless their address is flagged as **Overseas**.

1. Select **Process | Transfer Groups | Students | Student Selection** and click the **Edit Feeder Transfer Groups** hyperlink to display the available feeder transfer groups. The list of groups is determined by the academic year of the new (receiver) in year transfer group. It includes:
  - The in year transfer group from the academic year before the new in year transfer group.
  - Phased transfer groups from the academic year before the new in year transfer group.
2. If necessary, filter the list by **Code**, **Description** or **Year**.
3. Select all the appropriate transfer groups, i.e. all the phased groups for the year that has just finished or is about to finish, and the current in year group.
4. Click the **Select** button to return to the **Students** tab.

5. The **Date Place Required** defaults to 1st September of the in year transfer group's academic year. Select a different date if appropriate. This date will be added to any applications carried over to the new transfer group if a date has not already been specified.

6. Click the **Add Students** button to add the relevant students from the selected transfer group to the new in year transfer group.

The numbers of students successfully added to the transfer group and the number that could not be added are displayed as hyperlinks on the **Students** tab. Click either of these links to display a printable report listing the students and giving further information relating to their application.