



A&T Back Office

Setting Up Phased Transfer Groups

Phased transfers are those in which children move from one stage of compulsory education to another (for example primary to secondary or lower to middle), usually in September, and involve a change of school.

Transfer groups are set up via **Process | Transfer Groups**. You can either copy an existing transfer group or set up a new one from scratch. The four sections of this reference guide explain how to set up a phased transfer group from scratch, and also enable you to edit the details of a copied phased transfer group.

Other tasks to carry out:

- Define sub groups. See *RG_OL_ATBO_Transfer Group_Sub Groups*.
- Add **E-Application Settings** if the transfer group is to be available for online applications. See *RG_OL_ATBO_Transfer Group_E-App Settings*.
- Associate tests with transfer groups if test scores are to be used as part of the offer process. See *RG_OL_ATBO_Tests*.

Adding Basic Details

1. Select **Process | Transfer Groups**.
2. Click the **Add New Transfer Group** hyperlink.
3. Deselect the **In Year** check box.
4. Complete the mandatory fields: **Transfer Group Description**, **Group Code**, **Academic Year**, **Intake NCY** (the year the children will transfer into) and **Student NCY** (the year the children are currently in). There can only be one phased transfer group for each NCY and date combination.
5. Select the **Use GIS** check box to measure distances using GIS and to use geocoded catchment polygons combined with the easting and northing of the student's address for allocations, rather than postcode catchments.
6. Select the **Use Admission Address** check box to use admission addresses instead of correspondence addresses (if different) when running the distance and catchment flagging processes.
7. Enter the starting number for Local Authority generated preferences in the **System Generated Preferences Starting No** field.
8. Select the **Hide Applic. Verified** check box to omit the **Application Verified** indicator from **Students | Applications | Application Details**.
9. Select appropriate **No Application**, **Withdrawn**, **No Offer** and **Import Feeder** pseudo bases.
10. Select the **Active** check box.
11. Click the **Save** button.

NOTE: Academic Years are added via **v4 Client** or **v4 Bases**.

Adding Coordinating Local Authorities

Coordinating Local Authorities are other LAs with which your LA has an agreement concerning the allocation of school places. For LAs in England this must include all English LAs as a minimum.

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 as appropriate.
5. Click the **Save** button.
6. If necessary, carry out the search again using different criteria to add more coordinating Local Authorities.



A&T Back Office

Setting Up Phased Transfer Groups

Adding Feeders

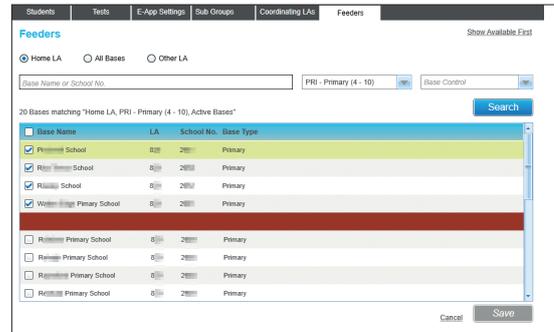
Feeders are the schools children currently attend. They are used during the student selection process to determine which children are added to phased transfer groups and from whom the LA (or the relevant Home LA) should expect an application.

1. Select **Process | Transfer Groups | Feeders**.
2. Select the **Home LA** bases, **All Bases** or **Other LA** bases radio button.
3. Enter or select the **Base Name** or **School No**, **Base Type** or **Base Control**.
4. Click the **Search** button to display a list of feeders that meet the search criteria.

If any of these feeders have already been selected for this transfer group they are listed first with their check boxes selected, followed by the other available feeders. The two sets of feeders are separated by a thick brown line.

- Click the **Show Available First** hyperlink to display the feeders that have not yet been selected (but that meet the search criteria) at the top of the list.

- Click the **Show Selected First** hyperlink to display the selected feeders at the top of the list (the default).



5. Select or deselect the check boxes to add or remove the feeders from the transfer group.
6. Click the **Save** button.
7. If necessary, carry out the search again using different criteria to add more feeders to the transfer group.

Adding Students

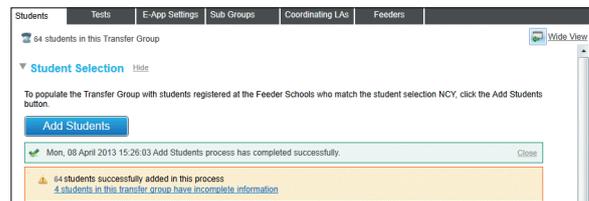
Student Selection populates the transfer group by attaching a cohort of students to a transfer group based on its **Student NCY** and the feeders associated with the transfer group.

Before adding students, ensure that as many of the students as possible have a correspondence address with a postcode and a Local Authority attached, unless their address is flagged as **Overseas**.

1. Select **Process | Transfer Groups | Students | Student Selection**.



2. Click the **Add Students** button to run the process.
 - All students registered at the feeders and in the National Curriculum Year selected as the **Student NCY** in **Transfer Group | Basic Details** are added to the transfer group.
 - The number of students successfully added is displayed.
 - If any of these students have incomplete information (e.g. no post code recorded as part of their correspondence address) they are added to the transfer group but are also recorded in an error log.
 - A Unique ID number (UID) is generated for each student.
3. If an error message is displayed, click the hyperlink in the message to view the error log.



If receivers are to be allocated on the basis of catchment areas you must correct any postcode errors before using **Pre-Offer Processing**, or these students will be automatically placed within the **No Application** base (from where they can be manually allocated via **Bases | Receivers | Preferences**).

Student Selection can be run more than once, for example:

- If new students have been registered at a feeder school.
- If new feeders have been added to the transfer group.

Each time, the process adds any new students and the count of these is displayed.

If students are added to the transfer group after this process has been carried out (e.g. by adding an application via the **Students** area), their UIDs are generated when they are manually added to a transfer group.

Note: Any student who resides in another LA will be added to the transfer group during this process but their application must be made to their Home LA. The LA can advise the other LAs of such students through the use of the DfE APT (Admissions Pre-Transfer) schema file which can be generated from the **A&T v3 | Inter Authority Transfer** processes.