



KS5: Academic Year Roll Over Checklist

This is a printable PDF version of our KS5 Academic Year Roll Over Checklist article, which you can use to tick off each step as you work through. Use this checklist to refresh student & grades data when students roll over into the next academic year. For example, when '24/25 (Current Y12) becomes '24/25 (Current Y13)'. Existing data for your cohorts will follow them as they roll over.

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Click the  icons for more information on that step, if needed.

1 / Import a new student data file (DATA > KS5 > select cohort > STUDENTS > Import)

- Extract an up-to-date student data file from your Management Information System (MIS), with your students' latest class and filter information, into Excel.
- Run the file through the Excel Add-In and save as a CSV (MS DOS). (SISRA tab in Excel > Prepare Student Data).
- In Analytics (STUDENTS > Import) select whether your file contains class/filter values from when students were in Y12 or Y13 and choose the file to import.
- Import the student data file and under the import options select: Update Classes – Yes, Update Filters - Yes, Update Statuses – Yes. This will ensure your classes, filters and student statuses are updated.

2 / Check and add KS4 Core Baselines (KS4 / EAP > Core Baselines)

If you have new students in your cohort, we recommend adding their KS4 core baselines, such as APS GCSE and APS All as well as KS4 Prior Maths and Prior English. For information on where to find KS4 core baselines, see our [KS5 - Where to find Core Baselines \(Admin\)](#) article.

- If you have a small number of new students, manually add their KS4 core baselines by clicking KS4/EAP > Core Baselines > Core Baselines List and clicking the **blue pencil** for the student(s) you want to add these for.
- If you have many new students, you can import their KS4 core baselines. These can be imported alongside your existing baselines, in a 4-column list in Excel, saved as a **CSV (MS DOS)** file. To do this, go to KS4/EAP > Core Baselines > Import Core Baselines, choosing the file, and clicking '**Start Import**'.

3 / Check and add EAP Baselines and EAPs (KS4 / EAP > EAP / Baselines)

- If you have entered expected grades into your EAPs, add EAP baselines for new students manually by clicking on the **grade count** for the baseline > '**Add Grade**' or, upload the new students' baselines in an additional file (using the same subject names) into KS4/EAP > EAP/Baselines > Uploads.
- [Create additional EAPs](#) for any new qualifications that use a different grade method, EAP baseline, or have different expected grades.


If you have blank / generic EAPs (with no expected grades), you don't need to add additional EAP Baselines! EAPs (if needed for new qualifications with a different grading type) can be created using ANY baseline.

4 / Upload a new set of assessment grades (GRADES > Uploads > Assessments)

Ensure your qualification names DO NOT include the data type (e.g. just 'Art' or 'Art AS' NOT 'Art Spring')

- Extract the grades from your MIS, into Excel. Here's a tip, if you ensure your qualification names in your MIS match those in Analytics, it will make the uploading process quicker and smoother for you!
- Run the file through the Analytics Excel Add-In and save as a **CSV (MS DOS)** file (4-column list including Student ID, Student Name, Qualification, and Grade).
- Click '**Create Assessment Collection**' to create a new collection. Enter a clear name including the year and assessment cycle (e.g. Y13 Autumn), enter an appropriate date, and select the correct term based on when these grades were collected.

- Click **'Upload Grade File'** and upload your assessment grades file.

 Taken to the **'Confirm Upload Qualification Name'** page? Set any new qualifications to 'New' and merge existing qualifications that have been uploaded with a different name.

5 / Upload latest grades data, e.g. Targets (GRADES > Uploads > Targets, Data Set 3, etc.)

- Extract the grades from your MIS, into Excel. Run the file through the Analytics Excel Add-In and save as a **CSV (MS DOS)** file (4-column list including Student ID, Student Name, Qualification, and Grade).
- Click **'Upload Grade File'** in the appropriate data set and upload your latest grade file.
- If a previous file exists in the same data set and you're replacing these grades, delete the previous file **after** uploading your new file (the **red X icon**), to ensure the latest grades pull through to reports when published.

Please note: You only need to upload grades if they have been collected for the new academic year - you do not need to re-upload data from previous years if they have not changed.

6 / Complete the Matching process for any new qualifications (GRADES > Matching)

Click **'Edit'** and check/complete the following:

- Set new qualifications to **'Yes'** in the **Included** column and select the relevant **EAP**.
- Enter the appropriate **QN code** (or Qualification Title) in the **QN/Qual Title column** and select the appropriate option. QN codes are recommended for accuracy and are usually in the format of 000/0000/0.

Qualification not listed? It may be unapproved, see [our KS5 Matching - Unapproved Qualifications \(Admin\) article](#).

- Select the **Faculty** (if applicable), click **'Save Changes'** and check/resolve any issues highlighted.

7 / Assign new qualifications to classes (STUDENTS > Classes > Assign Quals)

- Ensure all new qualifications have been assigned to the relevant set of classes by going to DATA > KS5 > select cohort > STUDENTS > Classes > Assign Quals and either clicking the **green plus** or **blue pencil icons**.




8 / Check Grades Management (GRADES > Grades Management > Select a data set or assessment collection)

- Resolve any **warning icons** that are flagged for each data set you have uploaded new grades into.

9 / Set Up L3 Value Added (GRADES > National Data > Value Added)

- Click **'Edit VA Data'** and select the latest available year. Analytics will then automatically link your qualifications to the national data available.

10 / Publish (STUDENTS, KS4/EAP & GRADES)

- Publish STUDENTS (STUDENTS > Publish Students > 'Publish'). 
- Publish KS4/EAP (KS4/EAP > Publish KS4/EAP > 'Publish'). 
- Publish GRADES for any data sets / assessments you have updated/added (GRADES > Publish Grades). 
 - To produce DfE based headlines, ensure the **Headlines toggle** is **green** and resolve any yellow or red **warning icons**.
 - Select a **Report Status** and an optional **Report Note**.
 - Select whether the data set or assessment should be your **default report**.
 - Click **'Publish'**.

Thanks for reading. Feel free to pop onto Live Chat if you have any queries.