



Standards
& Testing
Agency

Phonics screening check: monitoring visits guidance

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Introduction

This publication has been produced by the Standards and Testing Agency (STA) and provides guidance about monitoring visits for the phonics screening check. It contains the monitoring visit form and instructions for its completion.

Local authorities (LAs) have a statutory responsibility to monitor the administration of the phonics screening check. The legal basis for this activity is set out in The Education (National Curriculum) (Key Stage 1 Assessment Arrangements) (England) Order 2004 (as amended).

Monitoring visits help to ensure that the security and confidentiality of check materials are maintained, and that the check is administered correctly and consistently.

Section 1: Carrying out monitoring visits

Preparing for a visit

To carry out a monitoring visit correctly, you should make sure you have read and understood this document.

You should also be familiar with the published 2018 guidance:

- [Phonics screening check: administration guidance](#)¹ (in particular the section about maintaining the security of check materials)
- [Year 1 phonics screening check training video](#)²
- [2018 key stage 1: assessment and reporting arrangements](#)³ (ARA)

Your LA monitoring visits co-ordinator (or relevant person from your organisation) will give you specific information before each visit. Make sure you take:

- copies of the phonics screening check monitoring visit form and this guidance
- information to show which check materials the school has received (this information will be taken from the delivery note generator, which allows LAs to view the quantities of check packs sent to a school)
- details of the number of pupils being assessed at the school including any year 2 pupils who are expected to take the check
- copies of the 2018 check materials, available from the 'Test materials' section of [NCA tools](#)⁴ (for visits during check week)
- photo identification to present on arrival at a school (such as a passport, driving licence or official work pass)

Carrying out a visit

Depending on when your visit takes place, you will need to observe certain aspects of phonics screening check administration to make sure the school is following the check administration guidance correctly. You should use the monitoring visits form to record what you see. At the end of the visit you will need to meet with the headteacher, or delegated member of staff, to discuss your findings.

¹ www.gov.uk/government/publications/key-stage-1-phonics-screening-check-administration-guidance

² www.gov.uk/government/publications/phonics-screening-check-sample-materials-and-training-video

³ www.gov.uk/government/publications/2018-key-stage-1-assessment-and-reporting-arrangements-ara

⁴ <https://ncatools.education.gov.uk>

Visits before check week

Monitoring visits take place during the week beginning 4 June. You should use the visits to make sure that the phonics screening check materials are unopened and [stored securely](#)⁵, and that the school has received the correct number of packs. You can also discuss other elements of the proposed administration, such as the rooms where the check will take place.

Check materials

Your monitoring visits co-ordinator will give you details of the number of phonics screening check packs delivered to the school. Ask the headteacher, or the delegated member of staff, for annotated copies of their delivery note(s) and details of the number of check packs that were actually delivered.

Ensure that all phonics screening check materials are sealed and stored securely.

Damaged check packs

If a school has received damaged check packs, please advise them to contact the national curriculum assessments helpline immediately on 0300 303 3013, if they have not already done so.

Early opening of check materials

If you are carrying out a monitoring visit during the week beginning 4 June, the phonics screening check packs should not be open. If schools need to make adjustments to the check materials so that pupils can access it, these must be made during the check period, from Monday 11 June.

Who will administer the check

You should speak to the headteacher, or the teacher responsible for the administration of the check, to ensure that an appropriate member of staff will be administering it, and that they fully understand the administration arrangements, including scoring.

The phonics screening check must be administered on a one-to-one basis by a member of staff who is trained in phonics and known to the pupil. The role requires professional judgement about which responses are correct. The check should not be administered by a teaching assistant or higher level teaching assistant unless they are trained in phonics

⁵ www.gov.uk/government/publications/key-stage-2-tests-and-phonics-screening-check-keep-materials-secure

and have experience delivering phonics sessions to pupils. The check administrator must not be a relative or carer of the pupil taking the check.

Visits during check week

These visits take place during the phonics screening check week, Monday 11 June to Friday 15 June. You should read your copy of the 2018 check materials before the visit so you are familiar with the words pupils will be asked to decode. This will help you judge whether any pupils are given inappropriate assistance. Any printed versions of these materials must be kept secure until Monday 25 June.

You should arrive at the school in time to observe the complete phonics screening check administration process.

This includes:

- opening the check packs (if you arrive in time to observe the first check)
- administering the check(s)
- storing the check materials and answer sheets securely

You should also confirm that:

- the room for the phonics screening check is suitable
- wall displays are covered up or, if uncovered, they do not offer any assistance or distraction to pupils
- appropriate check administrators will be administering the check
- the school has made appropriate preparations for submission of data

You should carry out the checks relating to visits before or after the check period, if phonics screening checks have taken place for some pupils or are yet to be administered.

Pupil observation

You should aim to observe between 2 and 5 checks (depending on the size of the cohort).

Confirm with the headteacher, or check administrator, whether any pupils will find the observation uncomfortable. It is important that pupils are not distracted by the presence of a visitor. If a pupil is likely to be distracted, you should observe another pupil instead.

You should also agree with the headteacher and/or the check administrator whether your presence should be explained to the observed pupils.

What to do when observing the check

You should only enter the room before a pupil starts the phonics screening check. This is so that your monitoring activity does not disturb the pupil or interrupt administration of the check. The check administrator can also explain your presence to the pupil, if appropriate.

When you observe the phonics screening check ensure that:

- it is introduced to the pupil appropriately
- no inappropriate assistance is given (such as encouraging a pupil to blend words or 'have another go')

You are not expected to score any phonics screening checks in parallel with the check administrator. You might consider discussing the scoring decisions with the check administrator, but you should not overrule their judgement of a pupil's responses to the check.

If you observe what you consider misconceptions of phonics and/or the scoring of the check, you should discuss this with the check administrator after the check has been administered. For example, a visitor may think that the check administrator has not realised that an alternative pronunciation of a grapheme should be scored correctly. You would not need to report this to STA.

After the check has been completed, you should discuss the administration of the check with the check administrator.

Storing opened check materials

Schools must store the check materials and answer sheets securely until Monday 25 June. You should carry out the checks related to visits after the check week.

Collation of pupils' scores and return of data

You should discuss the arrangements in place for collation of pupils' scores into the data return sheets, and how this data will be provided to your LA. Where schools have already completed this task, you should make sure that the data return sheet has been completed correctly.

If the check has already been completed

You should carry out checks relating to visits after the check period if you arrive after the phonics screening checks have taken place.

Visits after check week

These visits take place immediately after the check week, from Monday 18 June. You should use these visits to discuss the administration of the check, ensure the materials are stored securely and confirm arrangements for submission of data.

Timetable variations

Schools can administer the phonics screening check until Friday 22 June if any pupils were absent during check week. Pupils must only attempt the check once during the check period. You should carry out the checks relating to visits during the check week if you observe a pupil taking the check.

Completing the monitoring visit form

You must complete all sections on the 2018 phonics screening check monitoring visit form (section 2) for each school you visit. You must answer all questions in sections A and B. Make sure you include your monitoring visits co-ordinator's name in case we have any enquiries about the visit.

If codes **X** or **N** are used, or you notice any other irregularity during the visit, contact the national curriculum assessments helpline on 0300 303 3013.

Meeting with the headteacher

Before you leave the school, you should meet with the headteacher, or delegated member of staff, to discuss your findings from the visit. If you have placed an **X** or **N** in any box on the monitoring visit form, you should advise whether the school should make changes to its check administration procedures for any remaining checks. If you did not find anything that concerned you, make this clear verbally to the school. Good practice should not be recorded on the monitoring visit form.

You and the headteacher, or delegated member of staff, should sign the monitoring visit form. This is to confirm the visit took place and that you have given feedback about the administration of the phonics screening check to the school.

You should leave a copy of the monitoring visit form, and any delivery notes you have annotated, with the headteacher or delegated member of staff. You must not add any additional detail or make changes to the monitoring visit form after this point.

After the monitoring visit

You should discuss any findings from your visit with your monitoring visits co-ordinator as soon as possible after you have carried out your visit.

If you identified any irregularities during your visit, you must send the completed monitoring visit form to your monitoring visits co-ordinator immediately after the visit. The deadline for returning all completed monitoring visit forms to your co-ordinator is Friday 22 June.

Section 2: 2018 phonics screening check monitoring visit form

Section A and **Section B** of this form must be completed for all visits. Only complete **Section C** if you have entered an X or N in Section B.

A copy of this form must be left with the school's headteacher, or delegated member of staff. Return the original to your monitoring visits coordinator.

School name											
DfE number					/						Date of visit
Monitoring visits coordinator									Local authority		

Section A: general administration	Y/N	Notes
Q1. Is there evidence that the consignment was checked on arrival?		
Q2. Are appropriate staff administering the check?		
Q3. Have administrators received appropriate training to administer the check?		
Q4. Is the room where the check is being, or going to be, administered appropriate?		

Section B: check-specific information	Check pack storage	Complete check administration observed	Completed answer sheets	Data collated for reporting
Indicate the status of observation with ✓, X, or N				

Section C:

Unless you have entered an X or N in Section B, please leave this section blank.

Short description of issues identified and any action you have taken:

Name of monitoring visitor		Headteacher or delegated member of staff	
Signature		Signature	

Please treat this form as confidential when it is complete.

Completing the form

Section A

Before, during and after the phonics screening check period, it should be possible to view the school's annotated delivery note to confirm that correct quantities of check materials were received by the school. You should be able to view the secure storage of check materials before and after the check.

For visits before and during the check period, you should ask the headteacher, or delegated member of staff, who is going to administer the check. Check administrators must be members of staff trained in phonics and known to the pupil, but not a relative or carer of the pupil.

You should ask whether the check administrators have read the 2018 KS1 assessment and reporting arrangements, the 2018 check administration guidance, 'Phonics screening check: scoring guidance', and watched the [Year 1 phonics screening check training video](#)⁶ so that they know how to administer the check properly.

You should also ask to view the room where the check is being, or will be, administered to ensure that it has been prepared properly. Displays that could help pupils in the check should have been removed or covered and the room itself should be appropriate for the administration of the check.

Section B

If **X** or **N** are used, contact the national curriculum assessments helpline on 0300 303 3013 immediately for further advice. Discuss the issues with your monitoring visits co-ordinator as soon as possible.

Unopened check pack storage

You should request to view the school's annotated delivery note(s) to confirm that correct quantities of check materials were received and that they are securely stored in a locked cupboard.

Use ✓ to indicate that the correct number of unopened check packs has been observed in a secure location.

Use **N** where the number of check packs listed on the delivery note and the number observed do not match. You should include a marked-up photocopy of the school's

⁶ www.gov.uk/government/publications/phonics-screening-check-sample-materials-and-training-video

delivery note(s) when you return the monitoring visit form. Where the distributor is clearly at fault this should be noted on the form.

Complete check administration observed

You should make sure that:

- the check is being administered by an appropriate check administrator
- no inappropriate assistance is given during the check
- displays/materials have been removed or covered, as appropriate

Use ✓ when the check administration observed during the monitoring visit is in accordance with the 2018 check administration guidance.

Use X where there is reason to question whether pupils have completed the check independently and unaided, for example where inappropriate support has been given (such as encouraging a pupil to blend words or 'have another go').

Completed answer sheets viewed

Use ✓ when the answer sheets have been properly completed and are being securely stored before collation for data return.

Use X where the answer sheets have not been properly completed and are not being securely stored before collation for data return.

Data collated for reporting

Use ✓ when the data from the answer sheets has been properly and accurately transferred to the LA's data system.

Use X where the data from the answer sheets has not been properly and accurately transferred to the LA's data system.

Returning the form

The headteacher or delegated member of staff should sign the form confirming the visit and that feedback about the check administration has been given to the school.

Return the form to your LA monitoring visit co-ordinator by Friday 22 June. LA monitoring visits co-ordinators must return this form to STA by Friday 29 June.

You can either return the forms electronically, sending a scanned copy of the completed form to sta.monitoring@education.gov.uk, or send completed forms in the post, via track and send service to Phonics monitoring, Standards and Testing Agency, 53-55 Butts Road, Earlsdon Park, Coventry, CV1 3BH.

Section 3: Getting help

If you have questions about carrying out monitoring visits, you should speak to your monitoring visits co-ordinator.

If they are unable to help, you can contact the national curriculum assessments helpline.

National curriculum assessments helpline

Telephone: 0300 303 3013

Email: assessments@education.gov.uk



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