



## **Universal Transfer Record (UTR) Guidance 2023**

The Universal Transfer Record (UTR) provides a succinct summary of learning and development and other relevant information to support the transition of children from nursery year into reception classes in schools, or between settings. The Bristol UTR should be completed with reference to the principles, processes and responsibilities outlined in the 'Bristol Positive Transitions in the Early Years' guidance.

The UTR has been developed in consultation with representatives from across the early years sector and it aims to be purposeful, practical and manageable. It should contain all the relevant information about the child at quick glance and clearly indicate where additional information may be included and where further conversations may be required to support transition of the child and family. The UTR should be completed by the child's key person wherever ever possible.

### **How to complete the UTR**

#### **Key information & About me**

- Complete details and circle or highlight to indicate Y / N if additional documents and / or conversations are required
- Write a few sentences to capture the child's voice and share the child's interests and play preferences. This will include information you have gathered over time from parents and carers.
- Add something about strategies and resources that support the child to settle and feel secure. This might include simple strategies such as verbal acknowledgement, using a transition object or photo of parents/carers etc.

#### **EYFS Transition Assessment**

- Write a few simple sentences to capture the child's characteristics of effective learning; for example, their confidence to play and explore, their attention and resilience, how they might plan, adapt and develop their play and their emotional wellbeing.
- Circle, highlight or name the early years framework or non-statutory guidance used to inform the 'Met or Not Yet' EYFS assessments.
- Include the age (in months) of when that assessment was made. This will help the school or setting understand the child's development and how this might relate to their own assessment system.
- Circle or highlight the Met or Not Yet box as appropriate for the child. [The Bristol Assessment Guidance](#) and the [Bristol Summative assessment pathway](#) may be helpful in completing Met and Not yet assessments.
- If a WellComm language assessment has been conducted, please indicate the stage that the child has achieved 'green' in, on the form. If this has not been conducted – please leave blank or strike through.
- Add comments on strengths and areas for further development if appropriate. For example, where a child may be excelling in a particular area or where they have specific support needs. It is not necessary to write a comment for all areas or for all children.
- It can be helpful to frame comments relating to areas for development using positive language, such as '*beginning to with visuals and prompts*' or '*is starting to .... when supported by an adult/ Makaton and more time for processing*'.

#### **Universal Transition Administration Information**

This is where further information and details, such as attendance and are recorded to help the receiving school or setting access all the information that they need to ensure a smooth and successful transition for both the child and the family.

## Completing the UTR for Children with SEND and emerging needs:

- **Either**  
Indicate where a Transfer pack has been completed and sent and indicate the which level of support the child is receiving. (This is to ensure that practitioners are clear about which children they need to link with the setting's SENCO about.)
- **Or**  
Indicate that a transfer pack has not been completed but there are some emerging needs that are being observed, in which case please indicate the area or areas of need. (This is to help schools identify children who may need more support and closer observation in transition and settling-in, but who do not yet have a clear identification of need.)

*(To insert a tick electronically, copy and paste the tick symbol ✓ highlighted in the document)*

## Additional Information

- Highlight, tick or circle any of the relevant additional information that applies to the child.
- Other Professionals Involved
- Please indicate any other professionals involved with the child or family, and their contact details that would be useful for the school to know about.
- Request for further conversations to support Transition
- Please use the box to indicate if further conversations between yourselves and the receiving school or setting would support a successful transition and remember to include your contact details.

## Parental Consent and GDPR

- In order to be GDPR compliant, parent must be made aware that the transfer record is being completed and shared with schools to improve outcomes for the child, in accordance with Data Protection Regulations (GDPR) and that they may request to view a copy if they wish. [A letter to inform parents](#) about the Universal Transfer record including a link to the [Privacy Notice](#) associated with the form is available to download from the Bristol Early Years website.

## How to Send the UTR to schools or settings

- When sending your UTRs to the receiving setting they will need to be emailed securely to the EYFS Leader of the school. Information on how to do this can be downloaded from the EYFS [Transitions page](#) of the Bristol Early Years website.
- Your lead Teacher can assist you in finding out the correct names and contact emails of receiving schools or settings.
- Sending UTRs by post is not considered a secure method, therefore settings who are unable to email them should deliver documents by hand to the correct named person.