

Using Assessment Plans

Assessment Tools

View, edit or apply assessment plan templates

This tab shows assessment plans that have been created for the qualification you are qualified to assess.

It also show assessment plans you have created that are not linked to assessment criteria.

VQ Manager [Revert to old look and feel](#) Welcome Anne Smith01 (Assessor 25405) [Logout options](#) [Help and training](#)

[Home](#) [My learners](#) **Assessment tools** [Reports](#)

[View, edit or apply assessment plan templates](#) [Create new assessment plan templates](#) [File library](#) [Internal verifier assessor feedback reports](#) [External verifier assessor feedback reports](#)

▼ **NVQ Certificate in Customer Service L2 (QCF) (EDI) 500_9378_2 (570)**
You have not created any assessment plans yet.

▼ **NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)**

Units and assessment criteria covered	Date created	Description	Select
1 1.1	01/08/2011	Progress review No.1	<input type="radio"/>
1 1.1	01/08/2011	Progress review No.2	<input type="radio"/>
1 1.1	27/03/2012	Test 27/3/12	<input type="radio"/>
1 1.1, 1.2; 2 2.1, 2.2, 2.3; 3 3.1, 3.2; 4 4.1, 4.2	28/09/2011	Test 28/9/11	<input type="radio"/>

▼ **Certificate for Proficiency in Food Industry Skills L2 (QCF) (EDI) 600_1659_0 (1049)**
You have not created any assessment plans yet.

▼ **Assessment plans not linked to criteria**

Date created	Description	Select
19/08/2011	E&D	<input checked="" type="radio"/>
06/09/2011	H&S policy 6/9/11	<input type="radio"/>
03/10/2011	Monday's worksheets	<input type="radio"/>

[View assessment plan template](#) [Edit assessment plan template](#) [Delete assessment plan template](#) [Apply to learner\(s\)](#)

Assessment plans linked to Qualifications

Assessment plans not linked to Qualifications

Types of assessment plans:

- Assessment plans linked to qualification – these plans are used for assessment
- Assessment plans not linked – these plans are for everything else, induction activities etc. policies and procedures

Remember – the way to communicate information to learners is through the assessment planning process

Creating assessment plans

File library

If you want any document/file/resource to go to learners in the assessment plan process they have to be in the file library:

The screenshot shows the VQ Manager interface. The 'File library' icon in the top navigation bar is highlighted with a red box. Below it, the 'Add files to library' section contains a 'Choose File' button (annotated with 'Choose file to upload'), a file upload area showing '4 files 100 Mb total maximum' and 'No file chosen', and an 'Upload Files' button (annotated with 'Click to upload'). To the right, a list of 'Uploaded files' is shown, with a red box and arrow pointing to it labeled 'Files documents already uploaded'. The list includes:

Date uploaded	File description	Uploaded by	Size	Delete
03/10/2011	cw1.pdf	Smith01, Anne (25405)	383 KB	
27/07/2012	assessment appeals.docx	Smith01, Anne (25405)	57 KB	
27/07/2012	learner policies procedures booklet 1_11_09.pdf	Smith01, Anne (25405)	408 KB	
27/07/2012	unit 101 communicate using customer service language mandatory u.pdf	Smith01, Anne (25405)	183 KB	

At the bottom right, there are 'Save' and 'Cancel' buttons.

Create new assessment plan template

The screenshot shows the VQ Manager interface. At the top, there's a navigation bar with 'Home', 'My learners', 'Assessment tools' (highlighted), and 'Reports'. Below this is a row of icons for 'View, edit or apply assessment plan templates', 'Create new assessment plan templates', 'File library', 'Internal verifier assessor feedback reports', and 'External verifier assessor feedback reports'. The main content area is titled 'Create assessment plan template Step 1: Select qualification'. It features a 'Select qualification:' dropdown menu with the following options: 'Not linked to any qualification's units' (selected), 'Not linked to any qualification's units', 'NVQ Certificate in Customer Service L2 (QCF) (EDI) 500_9378_2 (570)', 'NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)', and 'Certificate for Proficiency in Food Industry Skills L2 (QCF) (EDI) 600_1659_0 (1049)'. A 'Continue' button is on the right.

Plan not linked to assessment criteria:

The screenshot shows the 'Create assessment plan template Step 4: Edit and Save' screen. It has the same navigation bar and icons as the previous screen. The main content area is titled 'Create assessment plan template Step 4: Edit and Save'. It features a '▼ Assessment plan' section with a 'Name' field containing 'Induction Plan' and a 'Notes' field containing 'Please read policies and procedures.' A red callout bubble points to the 'Name' field with the text 'Give the plan a name and any instructions'. Below this is a '▼ Link files from library' section with a table of files. A red callout bubble points to the 'Select' column of the table with the text 'Select any files to attach, then click save'. At the bottom right, there are 'Save' and 'Cancel' buttons.

File name	File description	Size	Date	Type	Select
assessment appeals.docx	assessment appeals.docx	57 KB	27/07/2012	DOCX	<input type="checkbox"/>
cw1.pdf	cw1.pdf	383 KB	03/10/2011	PDF	<input type="checkbox"/>
learner policies procedures booklet 1_11_09.pdf	learner policies procedures booklet 1_11_09.pdf	408 KB	27/07/2012	PDF	<input checked="" type="checkbox"/>
unit 101 communicate using customer service language mandatory u.pdf	unit 101 communicate using customer service language mandatory u.pdf	183 KB	27/07/2012	PDF	<input type="checkbox"/>

▼ **Assessment plans not linked to criteria**

Date created	Description	Select
19/08/2011	E&D	<input type="radio"/>
06/09/2011	H&S policy 6/9/11	<input type="radio"/>
03/10/2011	Monday's worksheets	<input type="radio"/>
27/07/2012	Induction Plan	<input checked="" type="radio"/>

[View assessment plan template](#)
[Edit assessment plan template](#)
[Delete assessment plan template](#)
[Apply to learner\(s\)](#)

Make sure plan is selected – apply to learner(s):

[View, edit or apply assessment plan templates](#)
[Create new assessment plan templates](#)
[File library](#)
[Internal verifier assessor feedback reports](#)
[External verifier assessor feedback reports](#)

Apply to learners

Name	Additional unit assignments required	Email	Notify learner by email	Require learner's confirmation	No confirmation required
Anderson001, Charles	0		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anderson01, Charles			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson02, Charles			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson03, Charles	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson11, Charles	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test01, Ed	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

▼ **Assessment plan**

Name:

Target date:

Notes:

[Link files from library](#)
[Feedback and signoff](#)
[Learner confirmation](#)

[Apply to learner\(s\)](#)
[Cancel](#)

Plan linked to assessment criteria:

Select qualification:

The interface shows a navigation bar with five icons: a magnifying glass for 'View, edit or apply assessment plan templates', a folder with a plus sign for 'Create new assessment plan templates', a stack of books for 'File library', a clipboard with 'IV' for 'Internal verifier assessor feedback reports', and a clipboard with 'EV' for 'External verifier assessor feedback reports'. The main area is titled 'Create assessment plan template Step 1: Select qualification' with a 'Help for this page' link. Below the title is a 'Select qualification:' label followed by a dropdown menu showing 'NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)'. A blue 'Continue' button is at the bottom right.

View, edit or apply assessment plan templates Create new assessment plan templates File library Internal verifier assessor feedback reports External verifier assessor feedback reports

Help for this page

Create assessment plan template Step 1: Select qualification

Select qualification: NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)

Continue

Select unit(s):

The interface shows the same navigation bar as Step 1. The main area is titled 'Create assessment plan template Step 2: Select units' with a 'Help for this page' link. Below the title is a table with three columns: 'Unit number', 'Unit title', and 'Select'. The table lists 16 units, with the 6th unit, 'CU855 Manage personal development (13334)', selected. At the bottom right are 'Select unit(s)' and 'Cancel' buttons.

View, edit or apply assessment plan templates Create new assessment plan templates File library Internal verifier assessor feedback reports External verifier assessor feedback reports

Help for this page

Create assessment plan template Step 2: Select units

Unit number	Unit title	Select
CU860	Support team members in identifying, developing and implementing new ideas (13340)	<input type="checkbox"/>
CU864	Make effective decisions (13344)	<input type="checkbox"/>
CU867	Manage customer service in own area of responsibility (13347)	<input type="checkbox"/>
CU761	Set objectives and provide support for team members (13337)	<input type="checkbox"/>
CU855	Manage personal development (13334)	<input checked="" type="checkbox"/>
CU856	Develop working relationships with colleagues (13335)	<input type="checkbox"/>
CU857	Communicate information and knowledge (13336)	<input type="checkbox"/>
CU858	Plan, allocate and monitor work of a team (13338)	<input type="checkbox"/>
CU859	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility (13339)	<input type="checkbox"/>
CU861	Manage conflict in a team (13341)	<input type="checkbox"/>
CU862	Lead and manage meetings (13342)	<input type="checkbox"/>
CU863	Participate in meetings (13343)	<input type="checkbox"/>
CU865	Manage knowledge in own area of responsibility (13345)	<input type="checkbox"/>
CU866	Procure supplies (13346)	<input type="checkbox"/>

Select unit(s) Cancel

Select assessment criteria:

View, edit or apply assessment plan templates

Create new assessment plan templates

File library

Internal verifier assessor feedback reports

External verifier assessor feedback reports

[Help for this page](#)

Create assessment plan template Step 3: Select criteria

Unit	Learning outcome	Assessment criteria	The Candidate needs to...	How the learner can do it...	Select performance criteria to add to assessment plan <input checked="" type="checkbox"/> <input type="checkbox"/>
CU855	1	1.1	Outline work role performance requirements with those they report to.	Outline work role performance requirements with those they report to.	<input checked="" type="checkbox"/>
CU855	2	2.1	Identify ways that progress will be measured against own work objectives	Identify ways that progress will be measured against own work objectives	<input checked="" type="checkbox"/>
CU855	3	3.1	Explain knowledge and skills required for own work role.	Explain knowledge and skills required for own work role.	<input checked="" type="checkbox"/>
CU855	3	3.2	Identify opportunities and resources available for personal development.	Identify opportunities and resources available for personal development.	<input checked="" type="checkbox"/>
CU855	3	3.3	Produce a development plan to address own needs and agree with line manager.	Produce a development plan to address own needs and agree with line manager.	<input checked="" type="checkbox"/>
CU855	4	4.1	Plan activities in own development plan that address identified needs.	Plan activities in own development plan that address identified needs.	<input checked="" type="checkbox"/>
CU855	4	4.2	Collect feedback from colleagues on the result of development activities on own performance.	Collect feedback from colleagues on the result of development activities on own performance.	<input checked="" type="checkbox"/>
CU855	4	4.3	Assess the success of activities carried out as part of own development plan.	Assess the success of activities carried out as part of own development plan.	<input checked="" type="checkbox"/>

Select criteria

Cancel

View, edit or apply assessment plan templates

Create new assessment plan templates

File library

Internal verifier assessor feedback reports

External verifier assessor feedback reports

Create assessment plan template Step 4: Edit and Save

▼ Assessment plan

Name

Unit 1

Notes

Please see assessment criteria instructions.

▶ Link files from library

▼ Assessment criteria

Unit	Learning outcome	Assessment criteria	The Candidate needs to...	How the learner can do it...
CU855	1	1.1	Outline work role performance requirements with those they report to.	Please complete the attached worksheets
CU855	2	2.1	Identify ways that progress will be measured against own work objectives	Identify ways that progress will be measured against own work objectives

Assessment criteria can be reworded.

Repeat the same process of applying to learners:

View, edit or apply assessment plan templates

Create new assessment plan templates

File library

Internal verifier assessor feedback reports

External verifier assessor feedback reports

Apply to learners

Name	Additional unit assignments required	Email	Notify learner by email	Require learner's confirmation	No confirmation required
Anderson001, Charles		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anderson01, Charles			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anderson02, Charles			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anderson03, Charles	CU855	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson11, Charles		0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Test01, Ed	CU855	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If units appear in red as above, this means the learner is not doing these units and the assessment plan cannot be applied – you will need to change add the units in Unit Assignment TAB.

Assessment plans applied to learner:

Select learner Anderson001, Charles (34753)

Unit assignments

Assessment plans

Log evidence

Evidence list

Question bank

Progress reviews

Unit status, evidence matrix & signoff

Qualification status & signoff

Learner activity log

Search evidence

Help for this page

▼ NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)

Units and assessment criteria covered	Date assigned	Target date	Description	Status	Select
1 1.1; 2 2.1; 3 3.1, 3.2, 3.3; 4 4.1, 4.2, 4.3	27/07/2012	19/07/2012	Unit 1		<input type="radio"/>

▼ Personal Details (ECB) (340)

You have not applied an assessment plan to this learner yet.

▼ Assessment plans not linked to criteria

Date assigned	Target date	Description	Status	Select
27/07/2012	20/07/2012	Induction Plan		<input checked="" type="radio"/>

View assessment plan



Edit assessment plan

Remove assigned assessment plan

Ability to upload *ad hoc* documents to assessment plans

Assessors are now able to add documents directly to assessment plans, without uploading them to the File Library first. This option is **only** available after the assessment plan has been assigned to the learner. Assessors will need to click on My Learners and the Assessment Plans tab, select the learner in the drop-down at the top of the page, and select the Assessment Plan using the radio buttons. They should then click on 'Edit assessment plan' at the bottom of the page.

▼ Assessment plans not linked to criteria

Date assigned	Target date	Description	Status	Select
09/11/2015	30/11/2015	Enrolment documents	 	<input checked="" type="radio"/>

[View assessment plan](#)
[Edit assessment plan](#)
[Remove assigned assessment plan](#)

In the plan, there is a new section for files uploaded specifically to this plan for this learner, and also a section that allows the assessor to browse and add files.

Working with assessment plans

Assessment plans can be applied and sent to learners to work towards until complete. However assessors can also use assessment plans when logging evidence if assessor view of assessment plans is switched on. When you go log evidence, assessment plans are listed in different colours – this is the same view as the assessor:

Criteria met

Select the relevant assessment plan against which the evidence is to be logged or navigate to the relevant Unit, Element, performance Criteria, Range or Knowledge and Understanding item.

☐ Unit 1
☒ Unit 2
☐ Show gaps
☐ Open all checked items
☐ Open all linked items
☐ Close all

☒ NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X

Comments

Assessor comments

[Save and submit for verification](#)
[Return to Learner for action](#)
[Save and continue later](#)
[Cancel](#)

These are assessment plans, when you select, each will show the assessment criteria for the plan in the same colour as show

☒ Unit 1
☐ Unit 2

☐ Show gaps

☐ Open all checked items
☐ Open all linked items
☐ Close all

☐ NVQ Certificate in Team Leading L2 (QCF) (ED) 500_9208_X

- ☐ Unit CU855 Manage personal development
 - ☐ Learning outcome 1 Be able to identify and agree performance requirements of own work role
 - ☐ Assessment criteria 1 ☐
 - ☐ 1.1 Outline work role performance requirements with those they report to.
 - ☐ Learning outcome 2 Be able to measure and progress against objectives.
 - ☐ Assessment criteria 2 ☐
 - ☐ 2.1 Identify ways that progress will be measured against own work objectives
 - ☐ Learning outcome 3 Be able to identify gaps in skills and knowledge in own performance
 - ☐ Assessment criteria 3 ☐
 - ☐ 3.1 Explain knowledge and skills required for own work role.
 - ☐ 3.2 Identify opportunities and resources available for personal development.
 - ☐ 3.3 Produce a development plan to address own needs and agree with line manager.
 - ☐ Learning outcome 4 Be able to carry out and assess activities within own development plan.
 - ☐ Assessment criteria 4 ☐
 - ☐ 4.1 Plan activities in own development plan that address identified needs.
 - ☐ 4.2 Collect feedback from colleagues on the result of development activities on own performance.
 - ☐ 4.3 Assess the success of activities carried out as part of own development plan.

☐ Unit 1
☒ Unit 2

☐ Show gaps

☐ Open all checked items
☐ Open all linked items
☐ Close all

☐ NVQ Certificate in Team Leading L2 (QCF) (ED) 500_9208_X

- ☐ Unit CU855 Manage personal development
- ☐ Unit CU856 Develop working relationships with colleagues
 - ☐ Learning outcome 1 Understand the benefits of working with colleagues.
 - ☐ Assessment criteria 1 ☐
 - ☐ 1.1 Describe the benefits of productive working relationships.
 - ☐ Learning outcome 2 Be able to establish working relationships with colleagues.
 - ☐ Assessment criteria 2 ☐
 - ☐ 2.1 Identify colleagues within own and other organisations.
 - ☐ 2.2 Agree the roles and responsibilities for colleagues.
 - ☐ Learning outcome 3 Be able to act in a professional and respectful manner when working with colleagues.
 - ☐ Assessment criteria 3 ☐
 - ☐ 3.1 Explain how to display behaviour that shows professionalism.
 - ☐ Learning outcome 4 Be able to communicate with colleagues.
 - ☐ Assessment criteria 4 ☐
 - ☐ 4.1 Identify, information to others clearly and concisely.
 - ☐ 4.2 Explain how to receive and clarify own understanding of information.
 - ☐ Learning outcome 5 Be able to identify potential work-related difficulties and explore solutions
 - ☐ Assessment criteria 5 ☐
 - ☐ 5.1 Identify potential work-related difficulties and conflicts of interest.
 - ☐ 5.2 Explain how to resolve identified potential difficulties.

Signing off assessment plans

To check that assessment plans have been completed:

The screenshot displays a software interface for managing assessment plans. At the top, there is a navigation bar with icons for Unit assignments, Assessment plans, Log evidence, Evidence list, Question bank, Progress reviews, Unit status, evidence matrix & signoff, Qualification status & signoff, Learner activity log, and Search evidence. Below this, the main content area is titled "NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)". It contains a table with columns: Units and assessment criteria covered, Date assigned, Target date, Description, Status, and Select. The table lists two units: Unit 2 and Unit 1. Unit 2 has a date assigned of 27/07/2012 and a target date of 25/07/2012. Unit 1 has a date assigned of 27/07/2012 and a target date of 19/07/2012. Below the table, there is a section for "Personal Details (ECB) (340)" with a message: "You have not applied an assessment plan to this learner yet." Another section, "Assessment plans not linked to criteria", shows a table with columns: Date assigned, Target date, Description, Status, and Select. It lists one plan: Induction Plan, with a date assigned of 27/07/2012 and a target date of 20/07/2012. At the bottom right, there are three buttons: View assessment plan, Edit assessment plan, and Remove assigned assessment plan.

Units and assessment criteria covered	Date assigned	Target date	Description	Status	Select
1 1.1; 2 2.1, 2.2; 3 3.1; 4 4.1, 4.2; 5 5.1, 5.2	27/07/2012	25/07/2012	Unit 2		
1 1.1; 2 2.1; 3 3.1, 3.2, 3.3; 4 4.1, 4.2, 4.3	27/07/2012	19/07/2012	Unit 1		

Date assigned	Target date	Description	Status	Select
27/07/2012	20/07/2012	Induction Plan		

[View assessment plan](#) [Edit assessment plan](#) [Remove assigned assessment plan](#)

Make sure assessment plan is selected and click **Edit assessment plan**.

Unit assignments

Assessment plans

Log evidence

Evidence list

Question bank

Progress reviews

Unit status, evidence matrix & signoff

Qualification status & signoff

Learner activity log

Search evidence

▼ Assessment plan

Name

Unit 1

Assigned by

Smith01, Anne (25405)

Target date

19/07/2012

Notes

Please see assessment criteria instructions.

▶ Link files from library

▶ Feedback and signoff

▶ Evidence comments

▶ Assessment criteria

▶ Learner confirmation

Save

Cancel

Click on 'assessment criteria'

▼ Assessment criteria

Unit	Learning outcome	Assessment criteria	The Candidate needs to...	How the learner can do it...	Evidence assessed and approved	Range statements approved by assessor	K&U approved by assessor
CU855	1	1.1	Outline work role performance requirements with those they report to.	Please complete the attached worksheets	1		0/0
CU855	2	2.1	Identify ways that progress will be measured against own work objectives	Identify ways that progress will be measured against own work objectives	1		0/0
CU855	3	3.1	Explain knowledge and skills required for own work role.	Explain knowledge and skills required for own work role.	1		0/0
CU855	3	3.2	Identify opportunities and resources available for personal development.	Identify opportunities and resources available for personal development	1		0/0
CU855	3	3.3	Produce a development plan to address own needs and agree with line manager.	Produce a development plan to address own needs and agree with line manager.	1		0/0
CU855	4	4.1	Plan activities in own development plan that address identified needs.	Plan activities in own development plan that address identified needs.	1		0/0
CU855	4	4.2	Collect feedback from colleagues on the result of development activities on own performance.	Collect feedback from colleagues on the result of development activities on own performance.	1		0/0
CU855	4	4.3	Assess the success of activities carried out as part of own development plan.	Assess the success of activities carried out as part of own development plan.	1		0/0

As long as there is at least '1' against each assessment criteria then the plan has been completed and is ready to be signed off:

Click on the feedback and sign off:

▼ Feedback and signoff

Feedback

☒ Sign-off assessment plan

Plan is now complete:

Green tick – plan completed

Unit assignments | Assessment plans | Log evidence | Evidence list | Question bank | Progress reviews | Unit status, evidence matrix & signoff | Qualification status & signoff | Learner activity | Search evidence

▼ NVQ Certificate in Team Leading L2 (QCF) (EDI) 500_9208_X (571)

Units and assessment criteria covered	Date assigned	Target date	Description	Status	Select
1 1.1; 2 2.1, 2.2; 3 3.1; 4 4.1, 4.2; 5 5.1, 5.2	27/07/2012	25/07/2012	Unit 2		
1 1.1; 2 2.1; 3 3.1, 3.2, 3.3; 4 4.1, 4.2, 4.3	27/07/2012	19/07/2012	Unit 1		

Assigning multiple assessment plans at once

We have added a new tab to the Assessment Tools area called 'Apply multiple assessment plan templates'. (This could read activity plans or action plans depending on your centre settings).

The screenshot shows the VQ Manager interface. At the top, there's a navigation bar with 'Home', 'My learners', 'Assessment tools' (highlighted), 'Reports', and 'Dashboard'. A tooltip points to the 'Assessment tools' tab, stating: 'From this tab you can apply multiple activity plan templates to multiple learners.' Below the navigation bar, there are icons for 'View, edit or apply single activity plan templates', 'Apply multiple activity plan templates' (selected), 'Create new activity plan templates', 'File library', 'IQA assessor feedback reports', and 'External verifier feedback reports'. The main content area shows a 'Qualification' dropdown set to 'Customer Services NVQ - L2 (1)'. Below this, a table lists assessment plan templates for this qualification.

Units and performance criteria covered	Date created	Description	Select
5.1 A, B, C	24/07/2007	Thelma AP [148]	<input checked="" type="checkbox"/>
1.2 A, B, C, D, E, F, G; 1.1 A, B, C, D, E, F	22/04/2009	Unit 1 Prepare yourself to deliver good customer service [178]	<input checked="" type="checkbox"/>

At the bottom right of the table area is a blue button labeled 'Apply to learners'.

This tab will offer a drop-down to select a qualification, or not linked to criteria, and display the list of assessment plan templates for that qual. Users will not be able to select plans from more than one qualification at once. The assessor then ticks the required assessment plans in the “select” column.

When the blue arrow “Apply to Learners” is selected a new tab with a table with a list of the assessment plan titles appears with a box for each assessment plan target date. There is no “Notes” section at this stage. The notes are already on the template when you create it, and if necessary you can write notes on individual plans after you've assigned them.

The screenshot shows the 'Apply to learners' screen. At the top, the 'Qualification' dropdown is still set to 'Customer Services NVQ - L2 (1)'. Below it, the 'Apply to learners' section contains a table with learner information and checkboxes for assignment options.

Name	Additional unit assignments required	Email	Notify learner by email	Require learner's confirmation	No confirmation required
Krabbappel, Edna		wilhelm@strumpfer.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Primo, Roger		roger@facility.ac.uk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quin, Paula	5 and 1	paula@	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wolfson, Graham	5	graham@skillwise.net	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the learner table is a section titled 'Selected Activity plans'. It contains a table with two columns: 'Descriptions' and 'Target dates'.

Descriptions	Target dates
Thelma AP	<input type="text"/>
Unit 1 Prepare yourself to deliver good customer service	<input type="text"/>

At the bottom right of the 'Selected Activity plans' section are two buttons: 'Apply to learners' and 'Cancel'. A calendar widget is overlaid on the right side of the screen, showing the month of April 2016. The date 5th April is highlighted in yellow.

Select the learners and complete the target dates before selecting the blue arrow “Apply to learners”

Apply to learners

Name	Additional unit assignments required	Email	Notify learner by email	Require learner's confirmation	No confirmation required
Krabbappel, Edna		wilhelm@strumpfer.co.za	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Primo, Roger		roger@facility.ac.uk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quin, Paula	5 and 1	paula@	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wolfson, Graham	5	graham@skillwise.net	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Selected Activity plans

Descriptions	Target dates
Thelma AP	05/04/2016
Unit 1 Prepare yourself to deliver good customer service	19/04/2016

Apply to learners Cancel

A pop up appears to confirm the plans have been assigned to the learners. The target dates will be the same for all selected learners.

