

## Progress Reviews

Progress reviews can be set up in two ways by the assessor in the e-portfolio:

1. Ad hoc reviews can be added by assessors
2. Assessors can pre-set reviews

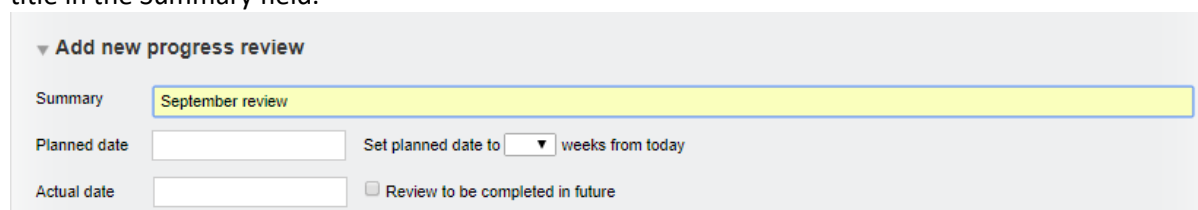
### Ad hoc reviews can be added by assessors

Assessor can add a progress review at any time by using the “Add new progress review” area.

### Assessors can pre-set reviews

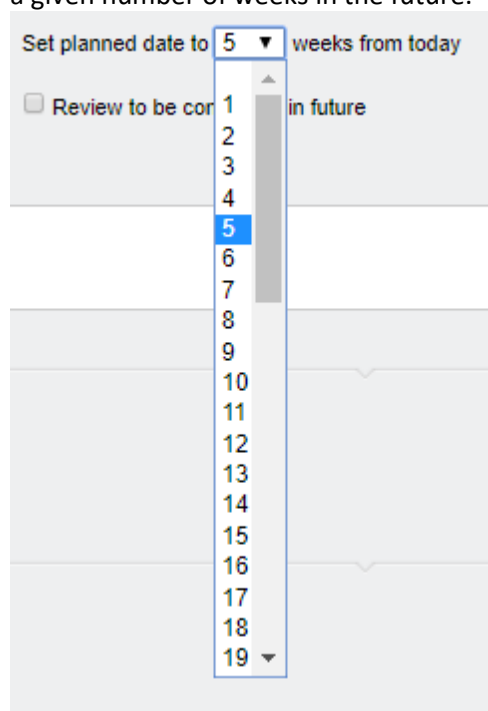
An Assessor can also create a pre-set Progress Reviews using the “Add new progress review area” again but adding a planned date for some time in the future. This will trigger the usual notifications in the ‘upcoming Progress Review’ area of the ToDo tab.

To set up a review like this, scroll down to the “Add new progress review” area and give the review a title in the Summary field.



The screenshot shows the 'Add new progress review' form. It has a 'Summary' field with the text 'September review'. Below it are 'Planned date' and 'Actual date' text boxes. To the right of the 'Planned date' box is a label 'Set planned date to' followed by a dropdown menu showing '5' and the text 'weeks from today'. Below the 'Planned date' box is a checkbox labeled 'Review to be completed in future'.

The planned date can be set in one of two ways. Clicking on the Planned date field will bring up the calendar for the Assessor to select a date. Alternatively, you can use the drop down to select a date a given number of weeks in the future.



The screenshot shows a close-up of the 'Set planned date to' dropdown menu. The dropdown is open, showing a list of numbers from 1 to 19. The number 5 is highlighted in blue. To the right of the dropdown is the text 'weeks from today'. Below the dropdown is a checkbox labeled 'Review to be completed in future'.

On selecting the desired number of weeks from today, the calendar automatically opens with the Monday of the chosen week selected. The Assessor can select another day if they wish at this point.

Planned date  Set planned date to  weeks from today

Actual date

Notes

◀ Sep 2017 ▶

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
|    |    |    |    |    | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

Click on the 'Review to be completed in the future' checkbox, add any relevant comments in the Notes field, and click 'save' at the bottom of the page.

On the day of the review, open the review and enter the Actual date, any notes and upload documents as normal. You are still able to tick the confirmation request for the learner and Line Manager. Don't forget to click 'save' at the bottom.

At this stage, we have added a comments box for the Learner and the Line Manager, so both are able to make comments as well as ticking the confirmation box. Note that confirmation can only be requested if the Actual date of the review is completed. This prevents users from confirming a review that hasn't happened yet.

Assessor view before confirmation:

▼ **Learner confirmation**

☐ Request learner to confirm?

▼ **Line manager confirmation**

☐ Request line manager to confirm?

► **Upload and attach files in support of this progress review**

Learner view:

▼ **Learner confirmation**

☐ I hereby confirm that I agree to the above

Learner comments

| ▼ Progress reviews (Gillett, Graham) |              |             |                            |                  |       |             |      |
|--------------------------------------|--------------|-------------|----------------------------|------------------|-------|-------------|------|
| Date logged                          | Date planned | Actual date | Summary                    | Logged by        | Notes | Attachments |      |
| 02/12/2016                           | 02/12/2016   | 02/12/2016  | Progress review 02/12/2016 | Krabbappel, Edna |       |             | Edit |
| 16/05/2017                           | 18/05/2017   | 16/05/2017  | progress review            | Krabbappel, Edna |       |             | Edit |
| 28/06/2017                           | 28/06/2017   | 28/06/2017  | progress review 3          | Krabbappel, Edna |       |             | Edit |
| 29/06/2017                           | 29/06/2017   | 29/06/2017  | progress review 3          | Krabbappel, Edna |       |             | Edit |
| 22/08/2017                           | 22/08/2017   | 22/08/2017  | August review              | Krabbappel, Edna |       |             | Edit |

Completed reviews have a new area whereby the current qualification progress pulls through onto the Progress Review. The date the review was saved by the Assessor appears on the screen along with the percentage completion for each qualification on that particular date. You will need to save the review with an Actual date and then re-open it to see this.

You will notice that the off the job training hours also pull through to this area.

▼ Progress review (Rose, Honey)

Summary
May 18 PR

Planned date
31/05/2018

Actual date
31/05/2018

Progress as on 31/05/2018

Apprenticeship Team Leader/Supervisor L3 ST0384\_01 Standards
28%

Diploma for Managers L3 (ILM) 603\_1166\_6
0%

NAS sample Programme of Delivery
0%

Off the job training as on 31/05/2018

Hours logged
42:00

Target hours to date
184:19

Total hours required
384:00

Notes (max. 500 words)

B
I
U
☺
”
🔗
☰
☰
Normal
⬇
A
🖨
T<sub>x</sub>

see attached

2/500 words

NB - The percentage completions will only appear on reviews completed after this enhancement. Unfortunately we were not able to backdate this feature to include it in reviews that were already complete.

## Using the emailing in functionality with Progress Reviews

Assessors can use this function with Progress Reviews. Remember that the email that is received by VQManager must be sent from the same email address that is recorded in your **personal details** tab.

The screenshot shows the VQManager web application interface. At the top, there is a header with the VQManager logo, a welcome message for Kurt Jacobs (Learner 3340), and links for 'Logout options' and 'Help and training'. Below the header, there is a navigation bar with icons for 'Home', 'My portfolio', and 'Reports'. A secondary navigation bar contains icons for 'To do', 'Info', 'My progress summary', 'File library', 'Personal details', and 'Messages'. The 'Personal details' tab is selected, and an arrow points to it. Below the navigation bar, there is a form for updating personal details. The form includes fields for 'User name' (KURTJACOBS3), 'Password', 'Home telephone number' (011 643 4978), 'Mobile telephone number' (07841 231138), and 'Email' (kurt@skillwise.net). There are 'Save' and 'Cancel' buttons at the bottom right of the form.

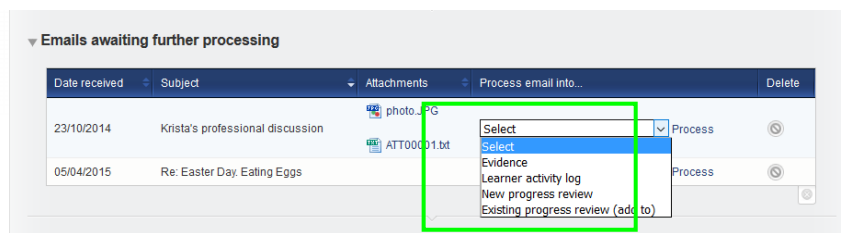
Emails must be sent to the following email address: **portfolio@vqmanager.co.uk**

The information is then *either* (depending on the settings for the centre, please speak with your assessor if you are unsure):

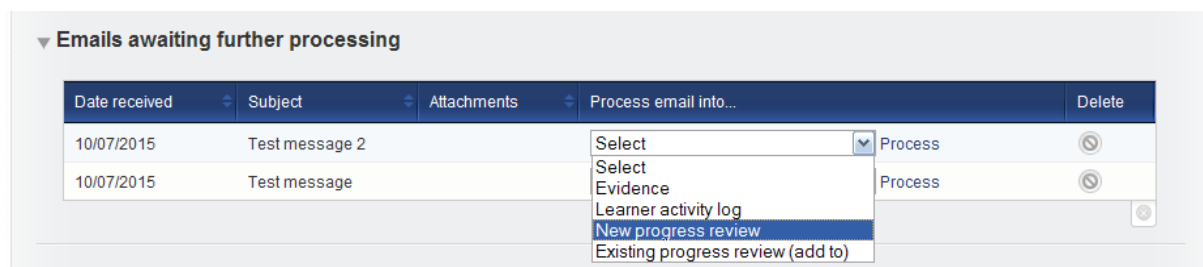
1. Placed on the **To do** tab of the assessor in a section called **Evidence emailed from learners**. Your assessor will process this email for you.
2. Placed on the **To do** tab of the learner in a section called **Emails awaiting further processing**. The email will appear as below:

| Emails awaiting further processing |                             |   |                       |        |  |
|------------------------------------|-----------------------------|---|-----------------------|--------|--|
| Date received                      | Subject                     | Attachments                             | Process email into... | Delete |  |
| 20/06/2012                         | Evidence from my daily work | Craig assembling goods for dispatch.doc | Select Process        |        |  |
| 20/06/2012                         | Direct observation of Kurt  | photo.JPG                               | Select Process        |        |  |
|                                    |                             | ATT11905.txt                            |                       |        |  |

Click on the **Process mail into** and select either **Evidence** **Learner Activity Log** **New Progreess Review** or **Existing progress Review (add to)** to proceed.



### Process in “New progress review”



If you select ‘New Progress Review’, a new page opens for you to select the learner and complete the Progress Review. Complete the form and click ‘save’ at the bottom.

### Process in “Existing Progress Review”

If you select ‘Existing Progress Review’, the page asks you to select the learner and the review you want to add to. Complete the form in the same way and click ‘save’ at the bottom.

