Procedure Manual VQManager

External Verifiers

Introduction

The purpose of this manual is to provide procedural training for all External Verifier user of VQManager.

Note: The term 'Learner' has been used throughout the system to represent a person undergoing a vocational qualification. Other synonyms could be **candidate** or **student**.

System Structure

VQManager is a hierarchical system. It is made up of a number of Assessment Centres which can be actual places, or can be a virtual collection of people. The Assessment Centre has members grouped within it. These members include:

- Learners
- Assessors
- Internal Verifiers (Internal Quality Assurers)
- External Verifiers
- Other System Users

Each learner is allocated to an assessor who could have many learners. Internal Verifiers ensure that standards remain consistent and can have access to any of the assessors within the centre. External Verifiers ensure that consistency is maintained between Assessment Centres and can see any Assessors and Internal Verifiers. EVs also look at consistency of standards/criteria in particular being met.

Logging onto VQManager

All users log in to VQManager in the same way. At the login screen, the user enters their:

- Username
- Password

The username and password are created by the Centre Administrator. Users can change their passwords in the Personal Details section. Logon to VQManager by using the following procedure:

Step	Action
1	From the login page, type in your username in **Username** field.
2	Type in your password in the ***Password*** field.
3	Click on the ***Login*** link.

User homepage

Each user type has a homepage customised to their requirements. This allows the user to get summarised information and quick access to different parts of the system.

The menu bar

Each user type also has a menu bar customised to their functions. An example of this can be seen below.
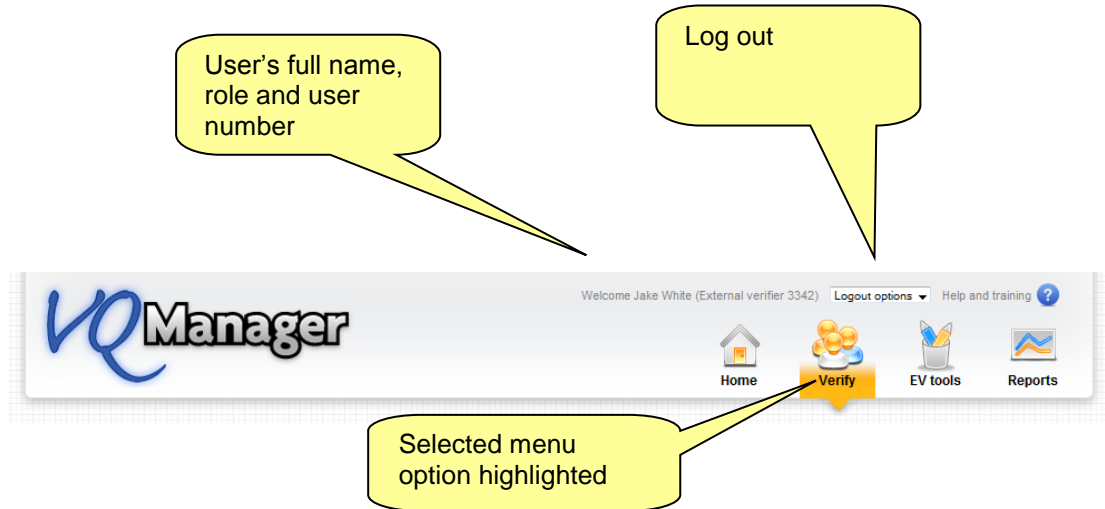
Personal Information

Users can change and update their personal information. This is originally set up by the Centre Administrator or comes from a Management Information System (MIS). Edit or view your personal details by following this procedure:

| Step	Action
1	On the *Home* page, click on the *Personal Details* tab.
2	The personal details appear. If you wish to edit these, make the relevant changes.
3	Click in the *Save* button.
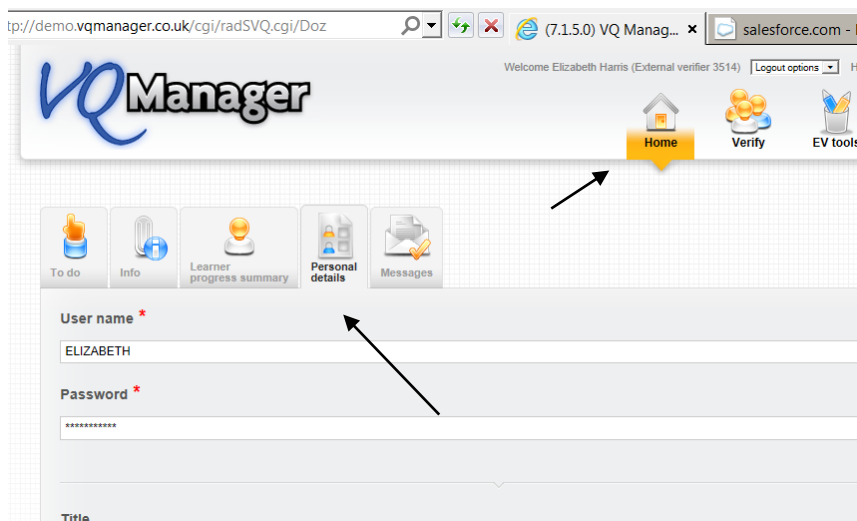
Note:

- The user name must be unique. VQManager will not allow you to add a user name which is identical to one already in use.
- Please use a password which is secure.
- Avoid creating passwords using:
  - Dictionary words in any language.
  - Words spelled backwards, common misspellings, and abbreviations.
  - Sequences or repeated characters. Examples: 12345678, 222222, abcdefg, or adjacent letters on your keyboard (qwerty).
  - Personal information. Your name, birthday, driver's license, passport number, or similar information.

Help

Each section on VQManager has rollover help attached. These sections are called tabs. The rollover help gives you information about the requirements of the tab itself as well as tips and hints and instructions on what to do. All the buttons and links also have mouse over information. An example can be seen below:
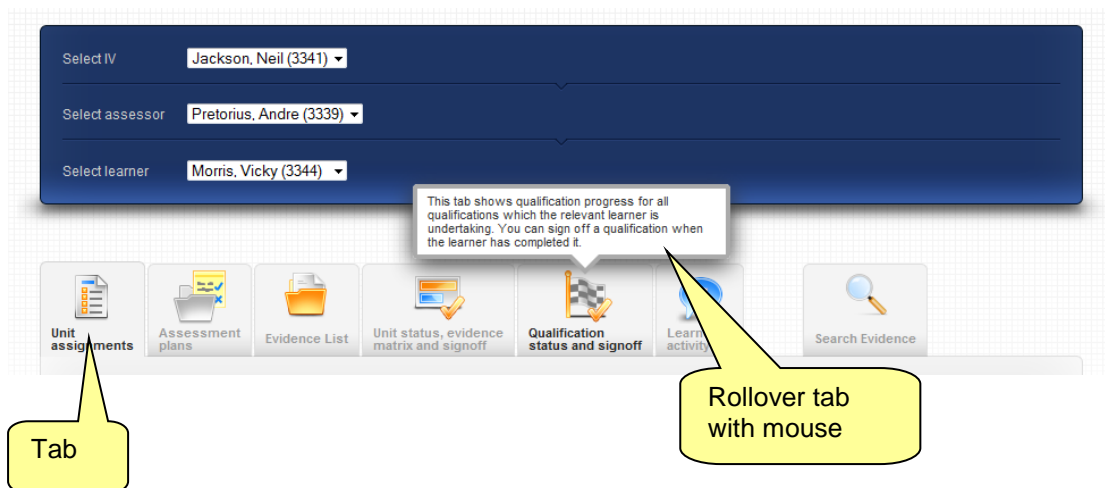
Browsers

VQManager uses technology which is incompatible with some old browsers. It is recommended that users upgrade their browsers to the latest version available. Updates are available for download from the internet free of charge.

EXTERNAL VERIFIERS

Introduction

External Verifiers are tasked with ensuring that there is consistency in the way that Assessors are assessing evidence across assessment centres. EVs are responsible for:

- Verifying that Assessors are assessing evidence consistently by reviewing the assessments
- Checking that IVs in the centre are verifying to a consistent standard
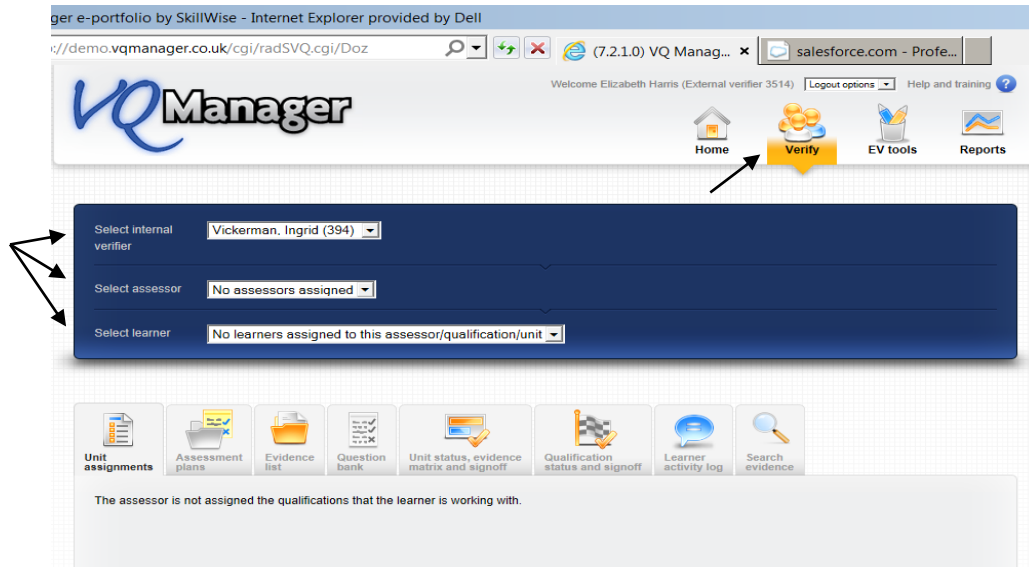- Writing assessment feedback reports to Assessors

EV: Home page - Tabs

On the **Home** page the EV can find a number of tabs including:

Tab name	Information about tab
To do	The *To Do* page contains sections with outstanding tasks for the EV. Examples of these are: • Evidence returned by IV after action has been taken All items appearing on this page should be dealt with by the EV.
Info	The *Info* tab contains items which are the responsibility of another user, but which the EV needs to monitor. Examples of these are: • Evidence awaiting action by IV
Learner progress information	The *Learner progress summary* tab contains a progress snapshot for all learners allocated to specific assessors including: • Learner name • Qualification name(s) • Current completion percentage • Qualification start date • Qualification target completion date • Estimated further days to complete qualification (based on current rate of completion) • Guided Learning Hours (GLH) if applicable.
Personal details	This tab allows the EV to change their personal details.
Messages	System *Messages* (e.g. notifications of system updates) can be found on this tab. These may be from SkillWise, or from the centre.
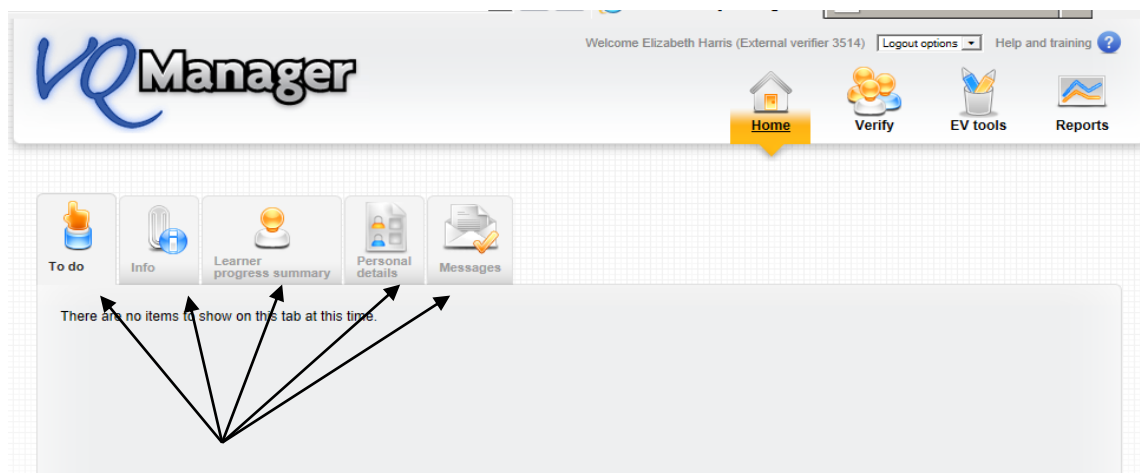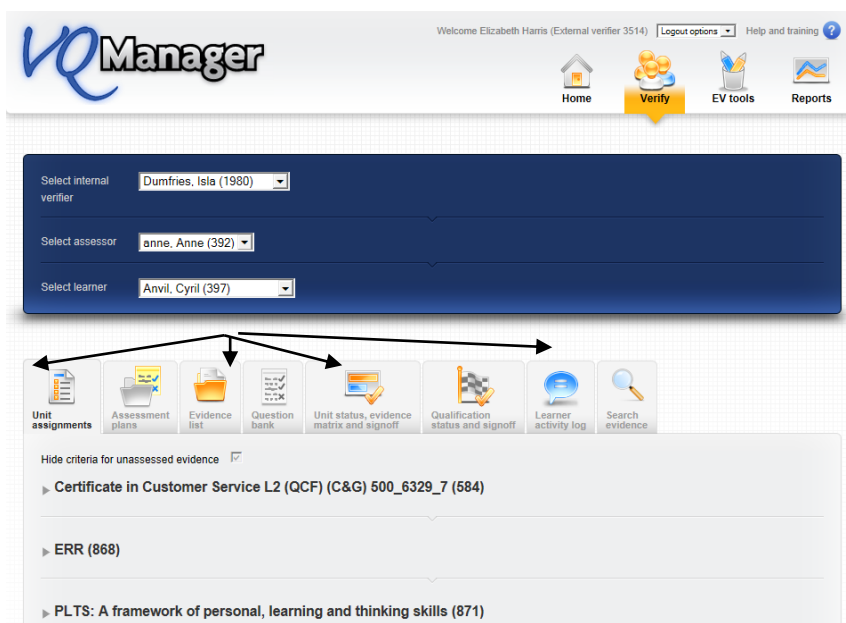
Verify

The Verify menu option contains all information related to Learners that have been allocated to the EV. They are organised according to the IV and Assessor who have been working with them.

Follow this procedure:

Step	Action
1	Click on the *Verify* menu option.
2	Select an **IV** from the list
3	Select an **Assessor** from the list
4	Select a **Learner** from the list. Note: The tabs now contain information for the Learner selected including: Unit assignments Assessment/ Activity plans (if applicable to the centre) Evidence list Unit status, evidence matrix and sign off Qualification status and signoff Learner activity log

Verify > Unit Assignments tab

This tab contains a list of all units assigned to the Learner by their Assessor(s). View the units assigned to the Learner by following this procedure:

Step	Action
1	On the **'Unit Assignments'** tab (with the correct Assessor/ Learner combination selected) click on the qualification name. The units belonging to the qualification will appear
2	Click on the **'Cancel'** button.

Verify > Assessment Plans

The *Assessment Plans* tab shows all assessment plans which have been assigned to the Learner.

The Summary view of the Assessment Plan tells you the following:

- Units and criteria that the plan covers
- The date the plan was assigned to the Learner
- The target date (i.e. the date by when the plan must be complete)
- The name of the plan
- The status of the plan. If you roll your mouse over the icons, the status information can be seen (see image)

Note:
- It is possible that the organisation has Assessment plans switched off. If this is the case, the Assessment Plans tab will not appear.
- Assessment plans could have a different name in your organisation, e.g. Activity Plans.
- Assessment Plans are located under the specific qualification on which they are based.
- If there is no Assessment Plan applied to the Learner for a specific qualification, the message 'An assessment plan has not been linked to this candidate yet' appears.
- Assessment Plans which are not based a specific qualification can be found in the '*Assessment Plans not linked to criteria*' section. An example of this sort of plan would be one based on induction.

Verify > Assessment Plan > View Assessment Plan

Follow this procedure to view an existing Assessment plan:

Step	Action
1	Select the Assessment Plan that you want to view by using the radio button next to the relevant plan.
2	Click on the **View Assessment Plan** button at the bottom of the screen.
3	The selected Assessment Plan appears.
4	Close the plan by clicking on the **Cancel** button at the bottom of the screen.

Note:
The Assessment plan in its entirety appears. Areas of interest for the EV are:
- Target date that the assessor set for the completion of the plan
- Files that were attached to it for the Learner to read (if applicable)
- Assessor feedback and signoff for the plan (if applicable)
- Evidence comments – these are Assessor feedback comments written against evidence which meets some of the criteria contained in the plan
- Any specific Assessor notes written to the Learner in the Performance Criteria section
- Learner confirmation of the plan (if applicable)

Verify > Evidence List

The **Evidence list** tab shows a summary list of all evidence logged for the selected Learner. This evidence is arranged by qualification. You are able to filter the evidence list which is displayed by using the following options:

- Select Qualification
- Select Unit

Verify > Evidence List > Open and view evidence

The **Evidence list** tab shows evidence logged for the selected Learner. This evidence is arranged by qualification. An example of an evidence summary is shown below. It tells you:

- Date evidence was created
- Unique evidence number (highlighted in red below)
- Evidence method(s)
- Qualification(s) and units
- Description of evidence

Follow this procedure to open the evidence:

Step	Action
1	Find the evidence item you wish to open
2	Click on the open arrow button to the right hand side of the evidence summary
3	The evidence item opens

Note:
- The workflow state that the evidence is in can be seen if you roll your mouse over the arrow button. The pop-up will tell you what the last thing was that happened with the evidence (see image above).
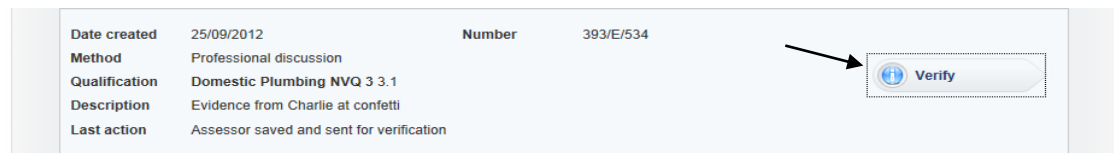
Verify > Evidence List > Verify evidence

Once evidence has been assessed (and possibly sampled by the IV), the EV may choose to review it. The Evidence list tab shows all evidence logged for the selected Learner. Evidence which has been assessed can be accessed from:
- The **Evidence List** tab – with the word *Verify* to the right of it.
- The Evidence matrix which can be found in the **Unit status, evidence matrix and signoff** tab. This is probably the preferable place to sample evidence as it's easier to see what you have covered, and what has not yet been verified.

Evidence can be verified by following this procedure:

Step	Action
1	Click on the **Verify** button to the right of the evidence summary item.
2	Once the evidence has opened, review the evidence.
3	Add a feedback comment in the **EV Comments** field.
4	Select one of the following links: • **Mark as verified** This suggests that you are finished with the evidence (you may still edit your feedback it if you wish) • **Save and return to IV for action** Send the evidence to the IV if there is something you need them to do • **Save and continue later** Select this when you want to work on the evidence yourself later. • **Cancel** Use this when you wish to close the evidence without saving any changes.

Note:
- The audit trail information is available for each evidence item in a section called **Audit Trail**. This will tell you exactly who has done what with the evidence item and when.

Evidence

Evidence methods

- ☐ Work products
- ☐ Witness testimony
- ☐ Written questions
- ☐ Simulation / storyboard
- ☑ Professional discussion

- ☐ Direct observation
- ☐ Oral questions
- ☐ Candidate feedback statement
- ☐ Accredited prior learning
- ☐ User defined option

Evidence number

393/E/534

Date

25/09/2012

Summary evidence description

Evidence from Charlie at confetti

Description of evidence

Sent from my iPhone

▼ **Audit trail**

Date	Time	Action	User	Role	Status
25/09/2012	14:42:07	Uploaded file photo.jpg	anne, Anne (392)		
25/09/2012	14:42:07	Assessor saved and sent for verification	anne, Anne (392)	Assessor	Q0100QI

Current work flow status: 122 (Q0100QI)

Last action: Assessor saved and sent for verification

	Date uploaded	File description	Uploaded by	Size
	25/09/2012	photo.jpg	anne, Anne (392)	2253 KB

▶ **Authenticate evidence**

Criteria met

Navigate to and select the relevant Unit, Element, Assessment criteria, Range or Knowledge and Understanding items against which the evidence is to be logged.

- ☐ Open all checked items

Comments

Assessor comments (anne, Anne)

Good evidence

Comments to trainee assessor (This comment is not visible to the learner)

Internal verifier comments

External verifier comments

Verify > Evidence List > Verify evidence > Return evidence for action

VQManager allows EVs to return evidence to the IV for action. The IV will either respond or send the evidence back to the relevant Assessor. The Assessor can edit the evidence and resubmit it to the IV or even send it back to the Learner if necessary. The evidence will continue to use the same evidence number. Evidence can be returned for action by following this procedure:

Step	Action
1	Within the **Evidence** page, review the evidence.
2	Write a feedback comment to the IV / Assessor in the **EV Comments** field so that they know what action to take.
3	Click on the **Return to IV for action** button. This evidence is then placed on the IV's homepage for action. When it is complete, it will be returned to you and appear on your own To Do page.

Note:
- Evidence items which have an action requested are listed on the **Info** tab of the EV homepage under a section titled **Evidence returned to IV for action**. This allows you to keep track of these items.
- You may return evidence as many times as you wish in order to get it correct. A full audit trail is kept in the system of the progression of the evidence.

When the Assessor / IV has completed the actions requested, they can resubmit the evidence to the EV with the requested amendments made. This evidence will appear in another new section on the **ToDo** tab of the EV homepage – **Resubmitted evidence**. This evidence can be EV'd as normal, and if necessary, submitted back again for further action.

Verify > Unit status, evidence matrix and signoff

The External Verifier can review any assessment that an Assessor has made on the Learner's evidence. They can do it using the following procedure:

Step	Action
1	From the **Unit status, evidence matrix and signoff** tab, select the unit you want to review using the radio button.
2	Click on the **View progress and Verify** button
3	The evidence matrix for the selected unit appears.
4	Review evidence by clicking on the **Verify** link for each evidence item. This can be found in the **EV date** column.
	Note: • Please ensure that the **EV date** column is showing in the evidence matrix. This can be shown or hidden using the checkbox at the top of the screen. • To see which evidence which has been reviewed by an IV, select the IV Date checkbox. If the evidence has been reviewed by the IV, the date that the review occurred will appear. • If the evidence item has been reviewed by an EV, the **verify** link changes to a date – the date on which the review occurred.
5	Once the evidence has opened, review the evidence.
6	Add a feedback comment in the **EV Comments** field.
7	Select one of the following links: • **Mark as verified** This suggests that you are finished with the evidence (you may still edit it if you wish) • **Save and return to IV for action** Send the evidence to the IV if there is something you need them to do • **Save and continue later** Select this when you want to work on the evidence later. • **Cancel** Use this when you wish to cancel the review
	Note: Evidence reviews can be edited at any time.

Select learner   Davies, len (698)

Unit assignments | Assessment plans | Evidence list | Question bank | Unit status, evidence matrix and signoff | Qualification status and signoff | Learner activity log | Search evidence

▼ Domestic Plumbing NVQ 3 (14)

Start date: 15/12/2008   Overall qualification % completion to date: 10 %

End date: 15/06/2009

Num	Unit title	% Completed (Actual)	Date assigned	Signed off by assessor	Confirmed by learner	Verified
3	Installation or Maintenance of Systems and Components (180)	21	15/12/2008			●
13	Commission and decommission complex Systems and Components (181)	0	15/12/2008			○

View Progress and sign-off ▶
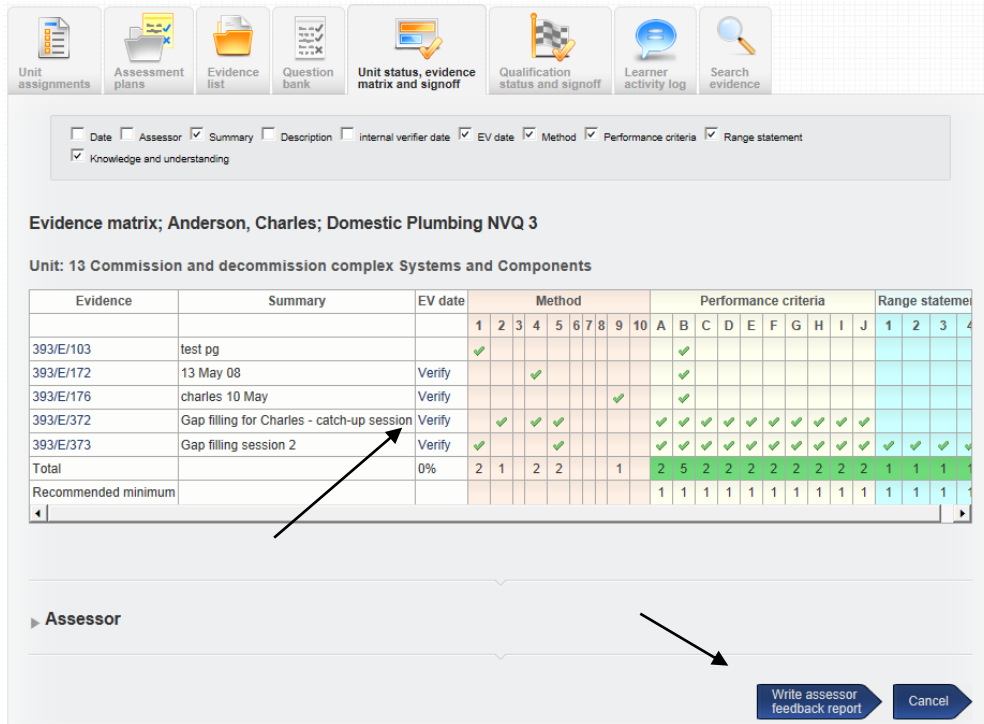
Verify > Unit status, evidence matrix and sign off > Sign off unit

An IV can sign off an individual unit which has been assigned to the Learner after full compliance with the requirements. Follow this procedure to view units that have been signed off by the IV:

Step	Action
1	From the Evidence matrix scroll to the bottom of the screen
2	Review the overall feedback comment for the unit (if applicable)
3	Review the rating of the evidence into the rating options provided: • Valid • Current • Authentic • Sufficient • Relevant
4	Check whether the **Verified** checkbox is checked – this signs off the unit.
5	Click on: • **Write feedback report** to go directly to the EV report for the Assessor • **Cancel** to cancel

☐ Date ☐ Assessor ☑ Summary ☐ Description ☐ Internal verifier date ☑ EV date ☑ Method ☑ Performance criteria ☑ Range statement
☑ Knowledge and understanding

Evidence matrix; Anderson, Charles; Management NVQ - L3

Unit: 8 Implement change

Evidence	Summary	EV date	Method											Performance criteria							Range statement								
			1	2	3	4	5	6	7	8	9	10	A	B	C	D	E	F	G	1	2	3	4	5	6	7	8	1
393/E/365	Evidence around implementing change	Verify		✔			✔						✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔
Total		0%		1			1						1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Recommended minimum													1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

▾ Assessor

Summative Assessment

Charles your excellent preparation helped us to sign off that unit in one session, well done.

☑ I confirm that the student has demonstrated competence by satisfying all the skills and knowledge criteria for this unit. I therefore deem this unit to be signed off.

▾ Learner

Learner's feedback

☐ Learner's confirmation

▾ Internal verifier

Internal verifier feedback

That was well assessed, and Anne your pre-planning helped Charles to be successful first time. Well done.

Internal verifier evidence rating

☑ Valid
☑ Current
☑ Authentic
☑ Sufficient
☑ Relevant

☑ Verified

[Write assessor feedback report] [Cancel]

Verify > Qualification status and signoff

An IV can sign off a qualification after full compliance with the requirements. Follow this procedure to view a qualification signoff:

Step	Action
1	From **the Qualification status and signoff** tab select the qualification that you want to review using the radio button
2	Click on **View progress and sign off**
3	Note the unit completion summary. All these units should be 100% complete. Check the Assessor summative assessment (if applicable)
4	Check whether the Internal Verifier sign-off checkbox is checked
5	Click on the Cancel button

Verify > Learner Activity Log

Learners, Assessors, IVs and EVs can access and add to a learner-specific Activity Log. Add to an Activity Log by following this procedure:

Step	Action
1	In the **Learner Activity Log** tab scroll down to the **Add new log** section. Select a Category for the new log by using the dropdown.
4	Type in a **Summary title** for the log.
5	Select the **date** on which the activity occurred.
6	Add some detail on the activity in the **Activity Detail** field.
7	**Upload and attach an electronic file** if relevant.
8	Click on the **Save** button. The new activity log item has been added.

Note:
- The summary information shows you the following information:
  - Date logged
  - Date of activity
  - Category
  - Summary title
  - Activity detail (note, this can be seen as a rollover if the mouse is hovered over the speech bubble icon.
  - Attachments
  - Guided Learning Hours (if applicable)

- Activity logs may only be removed by the person who logged them.
- Assessors, Learners and IVs can add activity log items to the list

Search for evidence

You can search for a specific evidence item on the **Search Evidence** tab. In order to search for evidence you will need one of the following:

- Evidence number
- A specific word that can be found in the evidence summary description.

EV Tools

Introduction

The **EV Tools** section is the place where you will find all content and tools not associated with a specific Learner. Tabs include

Tab name	Information about tab
EV Assessor feedback reports	This tab is the place where you can collate EV feedback comments into a feedback report for a specific Assessor.
IV Assessor feedback reports	This tab is the place where any IV feedback reports for a specific Assessor can be viewed
Assessor Activity log	The Assessor activity log is the tab where Assessors, EVs and IVs can log Activity, e.g. continuous professional development
File Library	You can upload files you might need to your File Library. It may also contain files shared with you by a Centre Administrator.
Internal Verifier sampling plan	Here you can view the sampling plans created by IVs. Note that not all centres use the sampling plan.

EV tools > EV Assessor feedback reports

The External Verifier can write feedback reports for an Assessor. They can do it using the following procedure:

Step	Action
1	From the **EV assessor feedback report** tab, select the relevant IV/ Assessor combination by choosing from the drop list.

Note that any existing feedback reports will appear in summary form below the selection area. |
| 2 | Click on **Write new report** to start a new feedback report to the Assessor. |
| 3 | Select a Learner from the list of Learners linked to the Assessor.

Note: Any EV comments which you have created against this assessor/ learner combination in the evidence will pull through to this report in the **Evidence** section. |
| 4 | Type in a name for your feedback report in the **Feedback report name** field. |
| 5 | Type in a review of the Assessor which consolidates the comments from the evidence. |
| 6 | Click on the **Save and submit to assessor** button when you are happy with the feedback report.

Note: You can choose to save the feedback report and submit it to the Assessor at a later date. Click on the **Save** button. You can edit the report by selecting the radio button nest to it in the summary list, and clicking on **Edit or view**. |

EV tools > IV Assessor feedback reports

If an IV has written a feedback report in VQManager, these will appear in this tab. Follow this procedure to review an existing IV report:

Step	Action
1	From the **IV assessor feedback report** tab, select the relevant IV/ Assessor combination by choosing from the drop list. A list of existing feedback reports will appear in summary form below the selection area.
2	Select the report that you would like to view.
3	Click on the **View** button.
4	The IV feedback report appears.
5	Click on **Cancel** to close the report.

Note:
- The summary information shows you the following information:
  o Date created
  o Report name
  o Learner name
  o IV name
  o Date submitted
  o Date read by Assessor
  o Assessor comments? (if applicable)
  o Documents attached? (if applicable)
- IV reports must be acknowledged by the relevant assessor

EV tools > Assessor Activity Log

Assessors, IVs and EVs can access and add to an assessor-specific Activity Log. EVs can view or add a new **Assessor Activity Log** by following this procedure:

Step	Action
1	From the **Assessor activity log** tab, select the relevant IV/ assessor combination.
2	A view of all previous activity logs appears in the summary view. View an existing log by clicking on the **View** link or add a new log by filling in the information in the **Add New Log** section.
3	Select a **Category** by using the dropdown.
4	Type in a **Summary title** for the log.
5	Select the **date** on which the activity occurred.
6	Add some detail on the activity in the **Activity Detail** field.
7	**Upload and attach** an electronic file if relevant.
8	Click on the **Save** button. The new activity log item has been added.

Note:
- The summary information shows you the following information:
  - Date logged
  - Date of activity
  - Category
  - Summary title
  - Activity detail
  - Attachments

- Activity logs may only be removed by the person who logged them
- Assessors and IVs can add activity log items to the list

EV tools > File Library

The EV has access to a personal file library which allows for the upload and storage of any electronic files. Upload files to the **File Library** by following this procedure:

Step	Action
1	On the **File Library** tab link click on the **Add files to library** section.
3	Browse your computer or external drive to find the relevant document(s).
4	Click on the '**Upload files**' button.
5	The uploaded file appears in the 'Uploaded Files' section. The view presents the following information: • File type • File name • File description (which you may edit so that you know what the file is about) • File size • Date uploaded
6	Click on the file name to open the file in a new window.
7	Click on **Save** to save the file library.

Note: The File Library may also contain files that a Centre Administrator has shared with you.

EV tools > Internal Verifier sampling plan

The EV has access to view IV Sampling Plans by following this procedure:

Step	Action
1	On the Internal Verifier sampling plan tab select the IV, assessor and qualification you wish to view using the drop down area.
3	Click on the **View Plan** button
4	The plan is displayed showing the IV intentions for that qualification.
5	The view presents the following information: • Learners allocated to this assessor and on this qualification • Percentage through the whole qualification • Units allocated to learner • Current status of each unit • Percentage complete for each unit • Any intention to sample • What is intended to be sampled • The date that sampling is intended to occur • Whether it is an interim or final sample • Any notes • Whether it has been sampled and the date

Note: Not all centres use sampling plans.

Reports

The sections which follow contain information about the reports which EVs can draw within VQManager.

Reports > Learner Status Details

This report gives personal information about each candidate including contact information. Follow this procedure to view the report:

Step	Action
1	From the **Reports** menu option, click on the **Learner Status Details** tab.
2	Select: • **View report** to see the report onscreen. • **Download report** to download report to CSV (can be read in Excel)
3	Click on **Cancel** to close the report

Reports > Progress

Follow this procedure to view the report:

Step	Action
1	From the **Reports** menu option, click on the **Progress** tab.
2	Select: • The type of progress report you would like to see • The learner that you would like to see • The qualification that you would like to see
3	Click on **View report** to see the report
4	Click on **Cancel** to close the report.
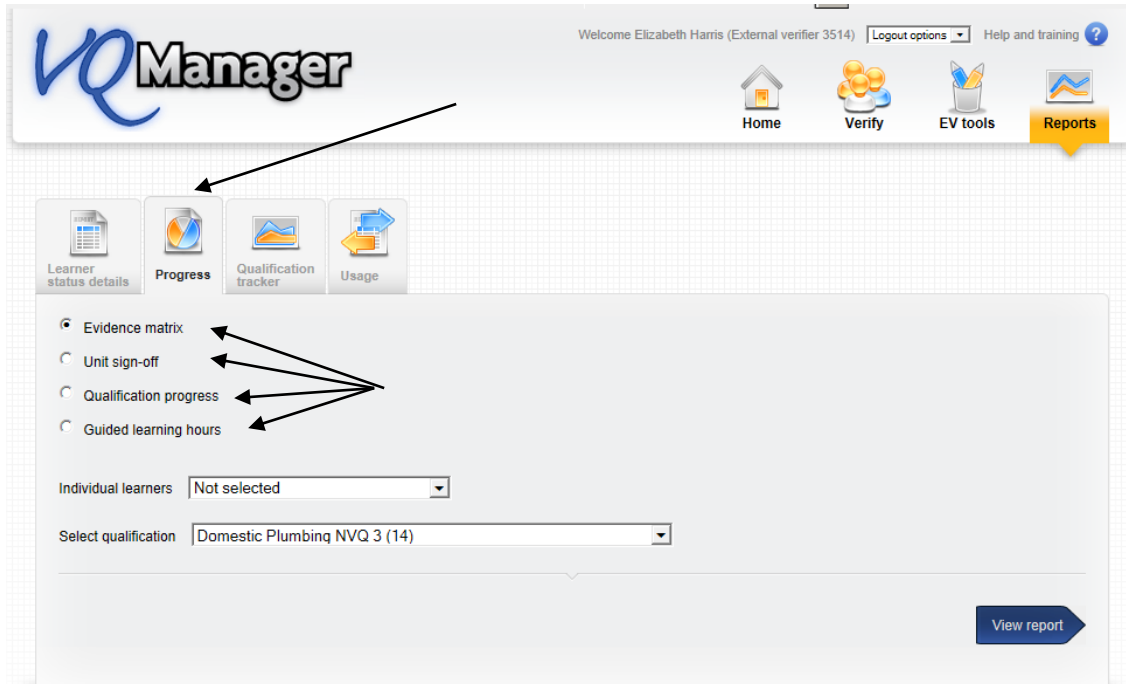
There are 4 progress reports which you can view:

• **Learner Evidence Matrix** Report
  This report shows the evidence matrix for the selected learner/ qualification combination for all units assigned to the learner.

- **Unit signoff Report**
  This report shows the unit summary for all Learners assigned to a particular qualification

One of the ways of commencing external verification is to view the situation for an Assessor's Learners at a unit level. The **Unit sign-off report** is a good way of doing this. Follow this procedure to view the **Unit sign-off report**:

Step	Action
1	From the **Reports** page, select the **Unit sign-off report** using the radio button.
2	Select the Assessor from the 'Candidates of Assessor' drop list. All the units for the Assessor's candidates for the specific qualification will appear in the list.
3	Click on the **'View Report'** link.
4	The report displays. Note that 4 dates can appear for each unit. These dates represent from top down: • Date assessor assigned unit to learner • Date assessor signed off unit • Date learner claimed competence in the unit (if required) • Date IV signed off unit (if applicable). This can also be seen in the system if you roll your mouse cursor over a date.

Note that each cell could also have a colour associated with it:
- Grey: unit not assigned to Learner
- White: unit in progress
- Yellow: unit signed off by Assessor
- Green: unit signed off by IV.

- **Qualification progress**
  This report shows the qualifications that have been assigned to each Learner, their progress, and the extrapolated completion date of the Learner working at their current rate. This allows you to easily see if a learner is on target to complete in time or not.

- **Guided Learning Hours**
  This report shows the number of Guided Learning Hours logged for a specific Learner/ qualification combination if applicable. Not all centres record Guided Learning Hours.

Reports > Qualification tracker

This report keeps track of Learner progress on a monthly basis so that progress can be seen over time. Follow this procedure to view the report:

Step	Action
1	From the **Reports** menu, click on the **Qualification tracker** tab.
2	Select: • Qualifications to include (or all qualifications) • Whether you want to see the learners belonging to a specific assessor (or all assessors) • The start date for the report • The end date for the report
3	Click on: • **View report** to see the report online • **Download report** to download the report to CSV
4	The report can be seen. **Note:** • The tracker report will not download or view properly in the Internet Explorer v6 or v7 browsers.

Reports > Usage

This report shows the number of times that users have logged into VQManager within the date range selected.

Follow this procedure to view the report:

Step	Action
1	From the **Reports** menu, click on the **Usage** tab.
2	Select: • The **start date** for the report • The **end date** for the report • If you want to include users who haven't logged in at all in the period selected Note that your centre will automatically be selected
3	Click on the **View report** button