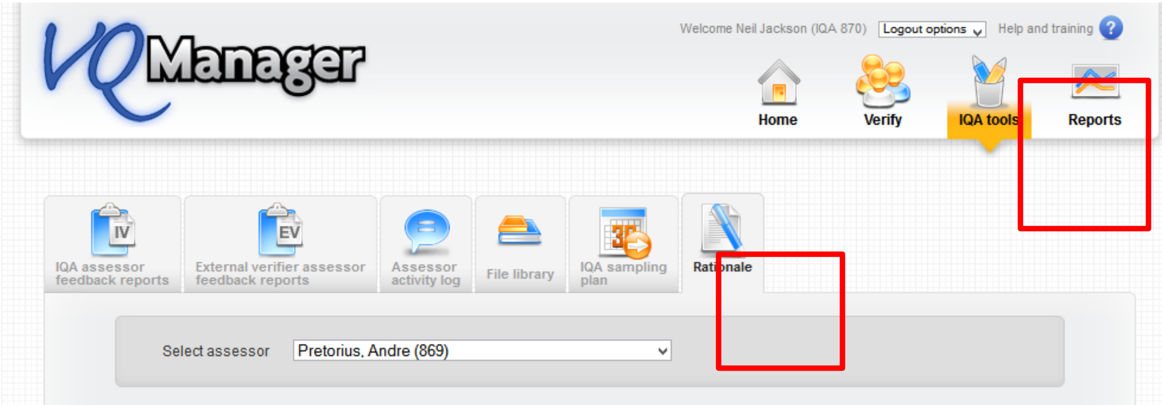
IV/IQA Rationale

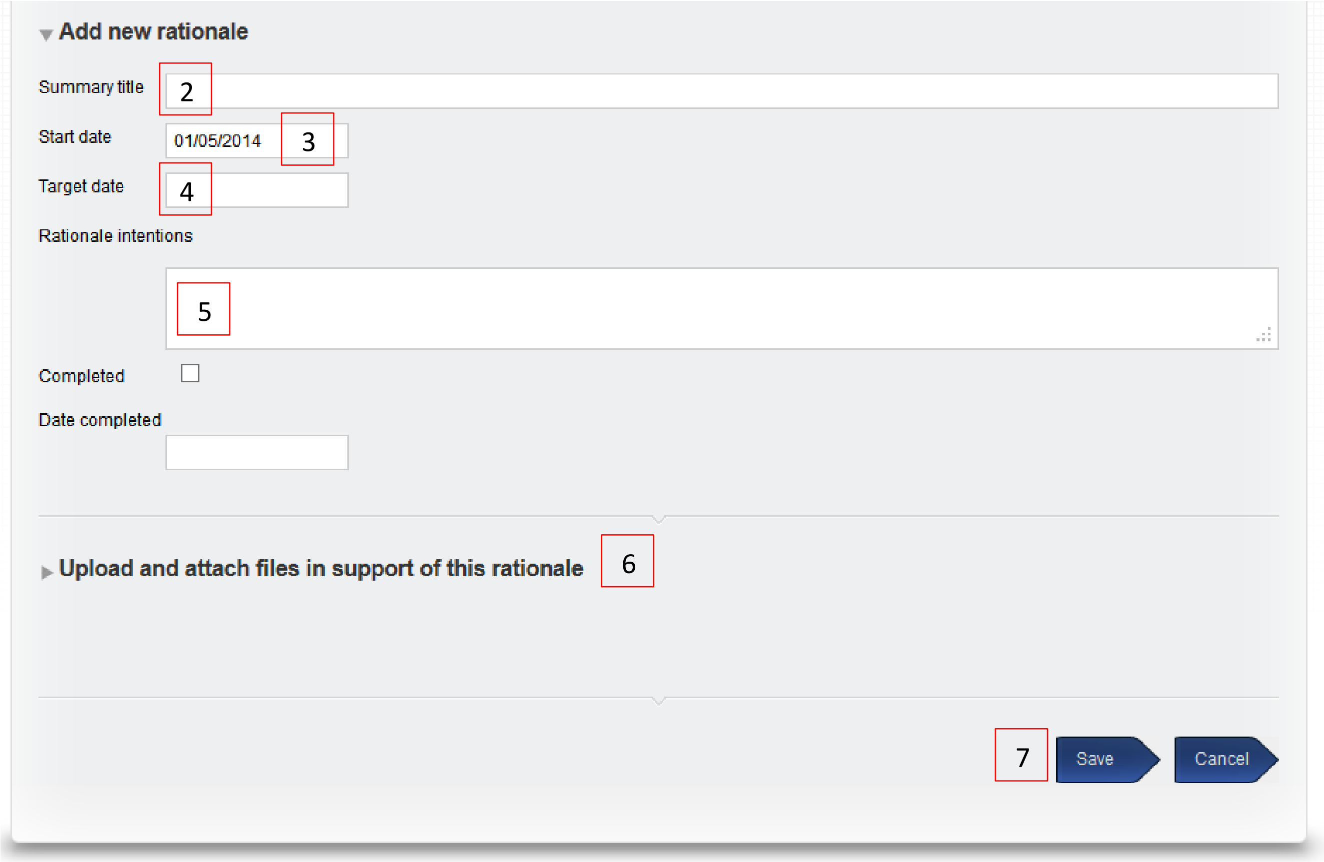
A Rationale can be defined as a record of quality assurance intentions and is associated with a specific assessor who is linked to the IV/ IQA.

The Rationale tab can be found under the main menu option **IQA tools** (or possible Internal Verifier tools depending on how your centre is structured). The **Rationale** tab is the furthest right (see image below).



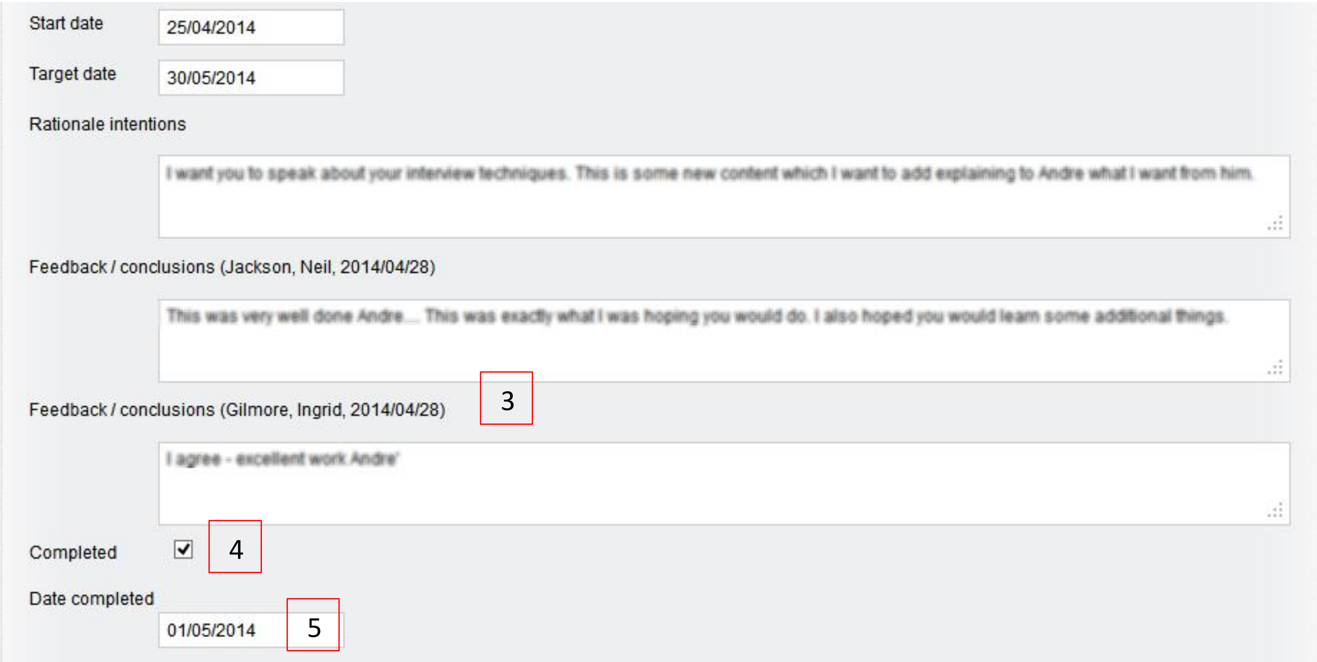
Follow this procedure to create a new Rationale (see image which follows):

Step	Action	Note
1	Select an assessor from the list.	Only assessors linked to you as IV/IQA will appear on the list.
2	Type in a **Summary title** for the new Rationale.	This field is mandatory.
3	Select a **Start date** for the new Rationale. This is the date from which the new Rationale will be valid.	Today's date will default into the field, but it can be changed if required. This field is mandatory,
4	Select a **Target date** for the new Rationale. This represents the end of the period for which the Rationale is intended.	This field is mandatory.
5	Type in your **Rationale intentions**. These are your quality assurance intentions for the specific assessor over the period that the Rationale is active.	This field is mandatory.
6	**Upload and attach a file in support of the Rationale**.	Use this section to attach any pertinent electronic files if required.
7	Click the **Save** button.	The new Rationale is saved.



Follow this procedure to complete a Rationale (see image which follows):

Step	Action	Note
1	Select the assessor for whom the Rationale has been created from the list.	Existing Rationales for that assessor will be listed in the **Previous Rationales** table.
2	Select the Rationale that you wish to complete from the list by clicking on the **Edit** link.	The Rationale will appear in a pop-up window.
3	Type in **Feedback/ conclusions** for the Rationale.	Multiple IV/IQAs can add their own feedback to the Rationale if required.
4	Check the **Completed** checkbox to indicate that the Rationale is complete.	
5	Select the **Date completed** for the date that the Rationale has been completed.	This field is mandatory if the Completed checkbox is checked and cannot be a date in the future.
6	**Upload and attach a file in support of the Rationale**.	Use this section to attach any pertinent electronic files if required.
7	Click the **Save** button.	The Rationale is saved.



Follow this procedure to edit a Rationale:

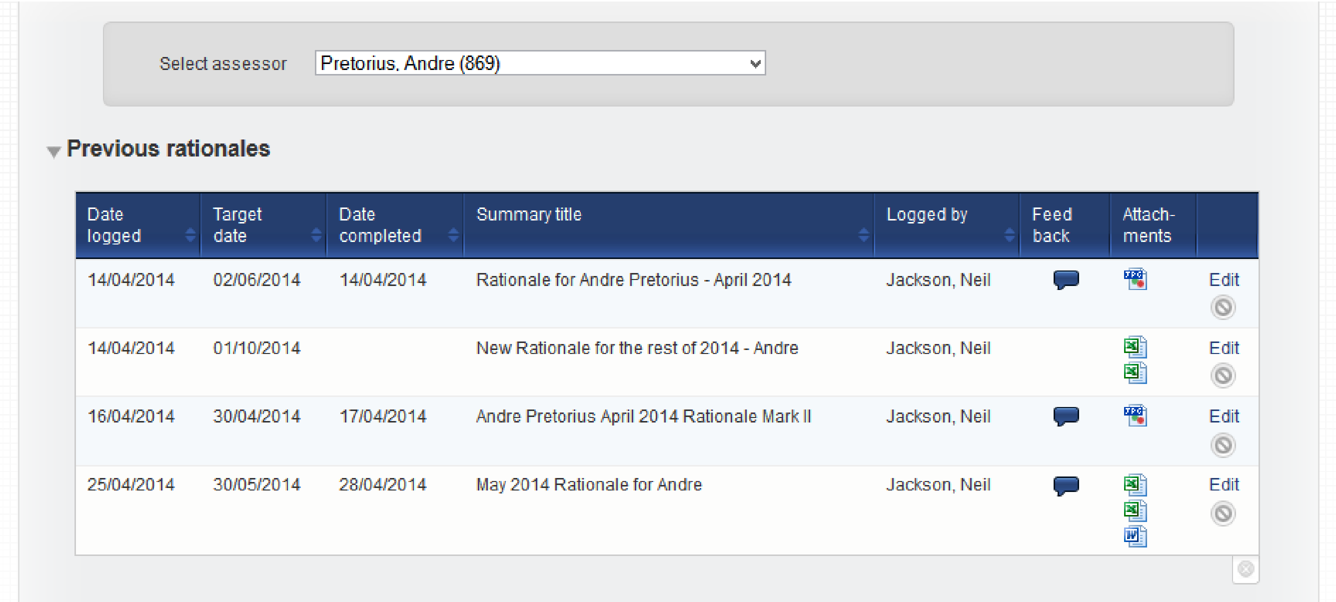
Step	Action	Note
1	Select the assessor for whom the Rationale has been created from the list.	Existing Rationales for that assessor will be listed in the **Previous Rationales** table.
2	Select the Rationale that you wish to edit from the list by clicking on the **Edit** link.	The Rationale will appear in a pop-up window.
3	Make any changes required to the Rationale.	Changes to the **Rationale intentions** and **Feedback/ conclusions** fields are saved for audit purposes.
4	Click the **Save** button.	

Follow this procedure to delete a Rationale:

Step	Action	Note
1	Select the assessor for whom the Rationale has been created from the list.	Existing Rationales for that assessor will be listed in the **Previous Rationales** table.
2	Select the Rationale that you wish to delete from the list by clicking on the **Delete** icon.	
3	Click the **OK** button to confirm deletion.	Deletion cannot be reversed so be careful that the correct Rationale has been selected for deletion.

All existing Rationales associated with the Assessor selected appear in a summary table which is visible once the Assessor has been selected. The table provides the following information:

Column title	Description
Date logged	This is the date on which the Rationale was created and saved and is automatically created by VQManager.
Target date	This is the **Target date** selected for the Rationale when the Rationale was created.
Date completed	This is the **Date completed** selected for the Rationale (visible if the Rationale has been completed).
Summary title	This is the **Summary title** for the Rationale.
Logged by	This is the **Name** and **VQManager user number** of the IV/IQA who created the Rationale.
Feedback	The Feedback speech bubble is shown if **Feedback/ conclusions** have been created for the Rationale. Roll your mouse over the icon to see the latest feedback (if applicable).
Attachments	The Attachments column shows icons indicating the type of file attached to the Rationale (if applicable). Roll your mouse over the icon to see the name and type of file and click to open the file if required.
Actions	Use the options in this column to perform the following actions: • **Edit** the Rationale • **Delete** the Rationale


Select assessor Pretorius, Andre (869)

Previous rationales

Date logged	Target date	Date completed	Summary title	Logged by	Feed back	Attach-ments	
14/04/2014	02/06/2014	14/04/2014	Rationale for Andre Pretorius - April 2014	Jackson, Neil			Edit
14/04/2014	01/10/2014		New Rationale for the rest of 2014 - Andre	Jackson, Neil			Edit
16/04/2014	30/04/2014	17/04/2014	Andre Pretorius April 2014 Rationale Mark II	Jackson, Neil			Edit
25/04/2014	30/05/2014	28/04/2014	May 2014 Rationale for Andre	Jackson, Neil			Edit

All activity associated with a Rationale is tracked to provide a complete audit trail and can be found at the bottom of each existing Rationale once opened. The audit trail will list the following information:

- **Date** action taken (DD/MM/YYYY)
- **Time** action taken (Hour/ Minute/ Second)
- **Action** taken, e.g.:
  - New Rationale added
  - Rationale intentions added
  - Feedback/ conclusions added
  - File attached
- Content. This can be seen in a Content speech bubble icon. Roll over the icon to see the content.
- User responsible for action (name and VQManager user number)

Additionally, the audit trail tracks changes in content to the following fields:

- **Rationale intentions**
- **Feedback/ conclusions**

Changes can be seen by clicking on the Content speech bubble icon and are displayed above the Audit trail table (see image below).

- Added (new) content is highlight in green.
- Deleted content is highlighted in pink.