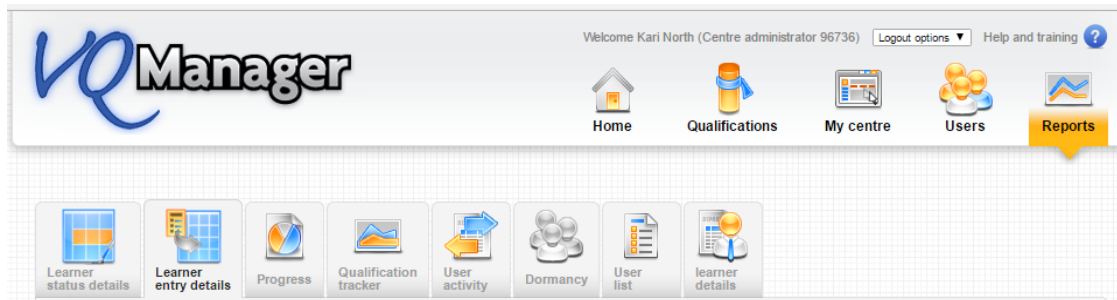


VQManager Enhancements January 2017

Adding to Learner Entry Details report



We have added several new data columns for the Learner Entry details report for the Centre Administrator, namely the following.

Employer

Qual Sign Off Date - assessor

Qual Sign Off Date - IV

Date Results Submitted to Awarding Body

Date Certificate Received

Date Sent Certificate to Learner

Awarding Body - learner enrolment number

Date Registered (awarding body)

Old look

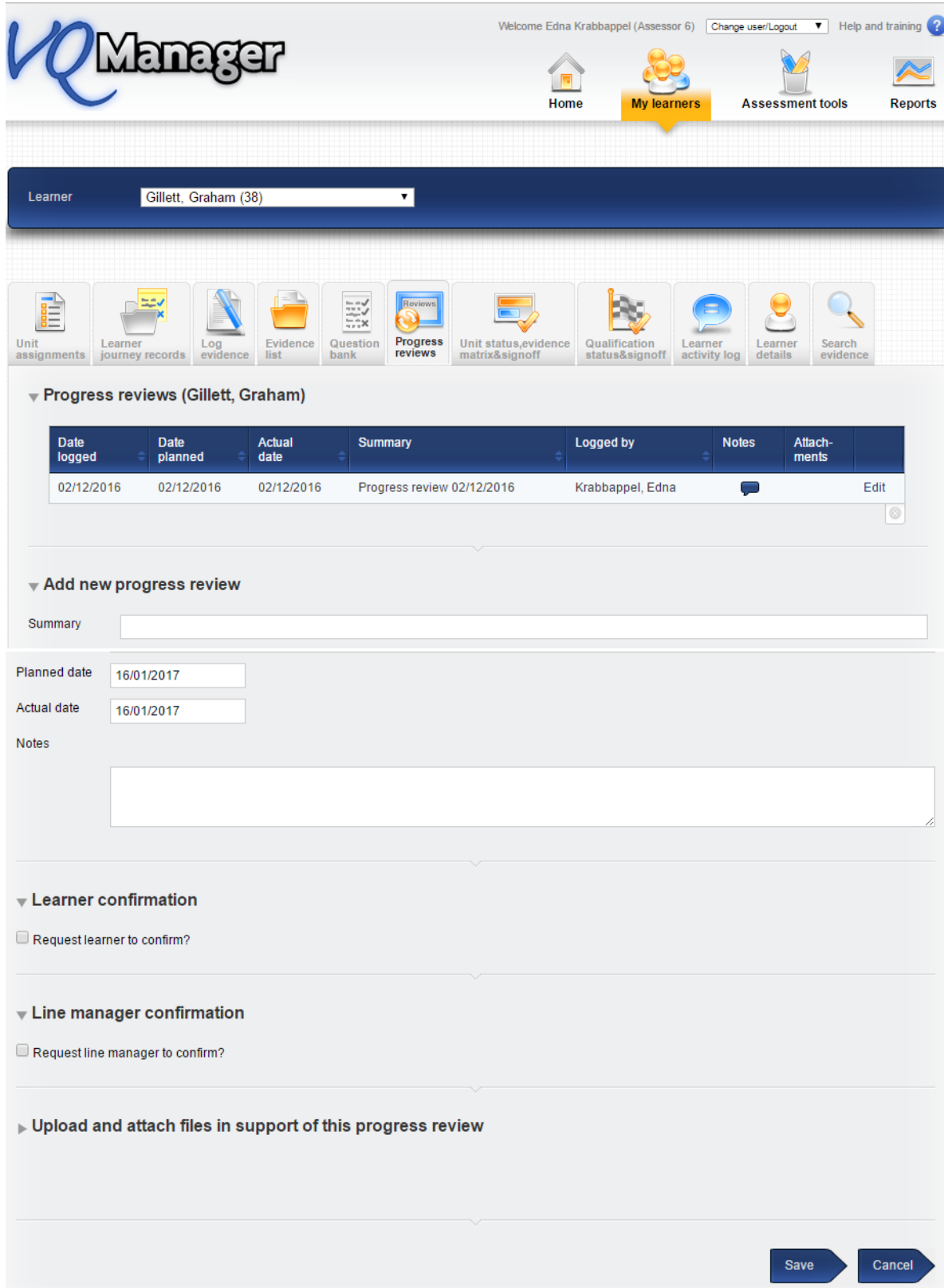
Learner Entry Details Report									
Unique user number	First name	Surname	Funding stream	DOB	Qualification		Start	End	

New look

Learner Entry Details Report															
Unique user number	First name	Surname	Funding stream	DOB	Employer	Qualification	Start	End	Qual assessor sign off date	Qual IV sign off date	Date results submitted to awarding body	Date certificate received	Date certificate sent to learner	Awarding body learner enrolment number	Date registered (awarding body)
	2016_12_16_L_1	2016_12_16_L_1													
	A1	A1			Boots Reading										
	A2	A2 change		01/06/1980	Boots Reading									AB# 478181254	07/07/2015
AAA111	AAA111	AAA111			Boots UK Ltd	Housing Benefits NVQ	19/12/2016	19/12/2017							

Adding Learner and Line Manager confirmation to Progress Reviews

Assessors are now able to ask Learners and Line Managers, if applicable, (this is hidden if no LM is assigned to that learner) to confirm Progress Reviews. This applies to both pre-set and ad-hoc Progress Reviews.



The screenshot shows the VQ Manager web application interface. At the top, the logo "VQ Manager" is on the left, and the user "Welcome Edna Krabbappel (Assessor 6)" is on the right with a "Change user/Logout" dropdown and a "Help and training" link. Below the header is a navigation bar with icons for Home, My learners (highlighted), Assessment tools, and Reports. A dark blue bar below the navigation bar shows the selected learner: "Learner Gillett, Graham (38)". Below this is a row of icons for various functions: Unit assignments, Learner journey records, Log evidence, Evidence list, Question bank, Progress reviews (highlighted), Unit status, evidence matrix & signoff, Qualification status & signoff, Learner activity log, Learner details, and Search evidence. The main content area is titled "Progress reviews (Gillett, Graham)". It contains a table with the following data:

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

Below the table is a section titled "Add new progress review" with a "Summary" text input field. Below that are "Planned date" and "Actual date" text input fields, both containing "16/01/2017". Below these is a "Notes" section with a large text area. Further down is a section titled "Learner confirmation" with a checkbox labeled "Request learner to confirm?". Below that is a section titled "Line manager confirmation" with a checkbox labeled "Request line manager to confirm?". At the bottom is a section titled "Upload and attach files in support of this progress review" with a file upload area. At the very bottom right are "Save" and "Cancel" buttons.

The audit trail includes an entry as to when the confirmation has been completed.

▼ **Learner confirmation**

☒ Learner confirmed on 02/12/2016

▼ **Line manager confirmation**

☒ Line manager confirmed on 02/12/2016

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

▼ **Audit trail**

Date	Time	Action	Content	User
02/12/2016	09:54:08	New log added		Krabbappel, Edna (6)
02/12/2016	09:54:08	Confirmation requested from learner		Krabbappel, Edna (6)
02/12/2016	09:54:08	Confirmation requested from line manager		Krabbappel, Edna (6)
02/12/2016	09:54:43	Confirmed by learner		Gillett, Graham (38)
02/12/2016	09:55:01	Confirmed by line manager		Lineman, Lineman (21)

The Learner receives a notification on the ToDo tab to “View/confirm” the entry. Select the hyperlink to reveal the Progress Review and the confirmation box.

VQ Manager Welcome A2 A2 change (Learner 1515) [Change user/Logout](#) [Help and training](#)

[Home](#) [My portfolio](#) [Reports](#)

[To do](#) [Info](#) [My progress summary](#) [File library](#) [Personal details](#) [Messages](#)

Help for this page

▼ **Confirmation of progress reviews**

Planned date	Summary	Actual date	
19/12/2016	Progress Review 3	19/12/2016	View / confirm

Welcome A2 A2 change (Learner 1515) | Change user/Logout | Help and training ?

Progress review item - Google Chrome

dev.vqmanager.co.uk/cgi/radSVQ.cgi/al?&r=1515&i=ccccrfmfvdrfrrdrkfrvklgds&osu=0&ca=1515&st=1_1_0_confirmation_of_progress_reviews&as=-1&aly=40&al=358&

Progress review (A2 change, A2)

Summary: Progress Review 3

Planned date: 19/12/2016

Actual date: 19/12/2016

Notes: progress review

Learner confirmation

☐ I hereby confirm that I agree to the above

The Line Manager receives a notification on the ToDo tab to “View/confirm” the entry. Select the hyperlink to reveal the Progress Review and the confirmation box.

Welcome Gary Mabbut (Line manager 1251) | Logout options | Help and training ?

VQ Manager

Home | Reports

Associates | To do | Info | Dashboard | File library | Messages | Personal details

Confirmation of progress reviews

Learner	Planned date	Summary	Actual date	
A2 change, A2	19/12/2016	Progress Review 3	19/12/2016	View / confirm

Welcome Gary Mabbut (Line manager 1251) | Logout options | Help and training ?

Progress review item - Google Chrome

dev.vqmanager.co.uk/cgi/radSVQ.cgi/al?&r=1251&i=rffcrfmfvdrfrrdrkfrvksvks&osu=0&ca=1515&st=6_1_3_0_confirmation_of_progress_reviews&as=-1&aly=40&al=358&

Progress review (A2 change, A2)

Summary: Progress Review 3

Planned date: 19/12/2016

Actual date: 19/12/2016

Notes: progress review

Learner confirmation

☒ Learner was requested to confirm on 19/12/2016

Line manager confirmation

☐ I hereby confirm that I agree to the above

This is not available to the Other System User, only Line Manager

Add notification for assessor when new learner is added.

We have added a notification for the Assessor on the To Do list when new learners are assigned.

This table has a 'remove' tick box in it so that the assessor can hide the entry if already viewed.

There is a link "view" which when selected takes the assessor to that new learner's Unit Assignments page.

▼ New learners assigned (last 30 days)				
Date assigned	Learner		Remove	
16/01/2017	Notification, Kari (1640)	View	<input type="checkbox"/>	
				Update page

▼ Upcoming (next 7 days) and overdue learner journey record delivery dates				
<input checked="" type="checkbox"/> Show 66 overdue learner journey records				
Due	Learner	Learner journey record	Qualification and performance criteria	
31/10/2016	newton, chris (1630)	Music performance	BTEC Extended Diploma in Music Technology L3 (OCF) Edexcel 500_7716_8 (96) 4.1 A, B, C, D, E, F, G, H, I	Edit
31/10/2016	Flanders, Rod (7)	ILP		Edit

Opening criteria when 'select all' is ticked for a group of criteria

When you select the "tick all" icon the unit (or Performance criteria or range – depending on which "tick all" you select) opens up all the relevant ticked criteria beneath.

Unit 5 NEW: Evaluate Benefit Claims ☒ ☐

Show gaps

Open all

Open all checked items

Open all linked items

Close all

⊕ BTEC in Hairdressing (Test)

⊕ Customer Services NVQ - L2

⊖ Housing Benefits NVQ

⊕ Unit 5 Evaluate Benefit Claims ☒ ☐

⊕ Unit 5 NEW: Evaluate Benefit Claims ☒ ☐

Enhancement Jan 2017

Version 1

17/01/17

Because the example below was ticked at unit level, the criteria for the whole unit including PCs and range all become ticked and the elements open up to show you what has been ticked. (Previously you had to open them up to ensure the elements were definitely ticked).

Housing Benefits NVQ

- ☒ Unit 5 Evaluate Benefit Claims ☒
- ☒ Unit 5 NEW: Evaluate Benefit Claims ☒
 - ☒ Element 5.1 Identify and Collect Information
 - ☒ Criteria 5.1 ☒
 - ☒ **A Check all claims to establish the claimant's eligibility for the benefit claimed in accordance with statutory requirements**
Written storyboards and list work actioned to be checked by your supervisor/quality checker. You should also produce a witness statement from them confirming that your assessment of the claimant's eligibility is correct. Also, highlight specific regulations involved.
 - ☒ **B Check all claims for sufficiency of evidence to support the claim**
Written storyboards and list work actioned to be checked by your supervisor/quality checker. You should also produce a witness statement from them confirming that the evidence you have collected is correct and sufficient.
 - ☒ **C Act promptly to obtain any missing information where evidence is insufficient**
List work actioned to be checked by your supervisor/quality checker. You should also produce a storyboard detailing the action taken and the relevant timescales.
 - ☒ **D Offer appropriate advice/help where a claimant requires assistance in pursuing a claim**
List work actioned to be checked by your supervisor/quality checker. You should also produce a storyboard detailing your action and advice given.
 - ☒ **E Conduct all communication with claimants in a professional manner and in a format useful to the claimant**
Witness statement and list work actioned to be checked by your supervisor/quality checker. You should also produce a witness statement from them confirming that your assessment of the claimant's eligibility is correct. Also, highlight specific regulations involved.
 - ☒ Range 5.1 Claimants ☒
 - ☒ Private tenants
 - ☒ Local Authority tenants

If the selection had been at criteria level, only the criteria would open and not the range.

Housing Benefits NVQ

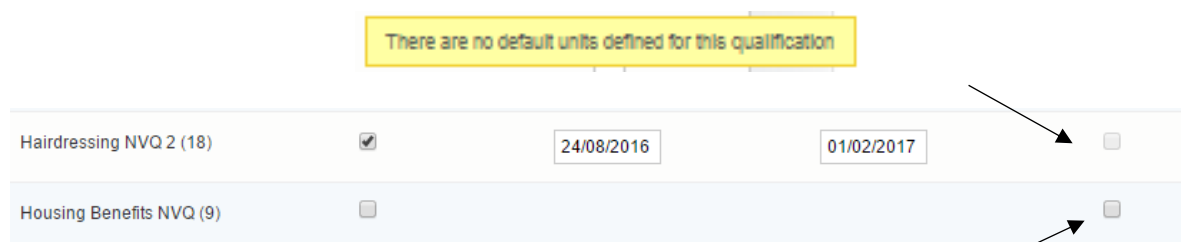
- ☒ Criteria 5.1 ☒
 - ☒ **A Check all claims to establish the claimant's eligibility for the benefit claimed in accordance with statutory requirements**
Written storyboards and list work actioned to be checked by your supervisor/quality checker. You should also produce a witness statement from them confirming that your assessment of the claimant's eligibility is correct. Also, highlight specific regulations involved.
 - ☒ **B Check all claims for sufficiency of evidence to support the claim**
Written storyboards and list work actioned to be checked by your supervisor/quality checker. You should also produce a witness statement from them confirming that the evidence you have collected is correct and sufficient.
 - ☒ **C Act promptly to obtain any missing information where evidence is insufficient**
List work actioned to be checked by your supervisor/quality checker. You should also produce a storyboard detailing the action taken and the relevant timescales.
 - ☒ **D Offer appropriate advice/help where a claimant requires assistance in pursuing a claim**
List work actioned to be checked by your supervisor/quality checker. You should also produce a storyboard detailing your action and advice given.
 - ☒ **E Conduct all communication with claimants in a professional manner and in a format useful to the claimant**
Witness statement and list work actioned to be checked by your supervisor/quality checker. You should also produce a witness statement from them confirming that your assessment of the claimant's eligibility is correct. Also, highlight specific regulations involved.
- ☒ Range 5.1 Claimants ☒
- ☐ Range 5.1 Information ☐
- ☐ Range 5.1 Statutory Requirements ☐

This function does not work for BTEC – pass, merit, distinction type qualifications due to the way criteria are graded rather than met.

Change to how default units tick box works

Default units are assigned to qualifications by the Organisation Administrator. See the support area for guidance in respect of this functionality, www.skillwise.net/support. Default units are generally mandatory units but can also be optional units which are *always* completed by your learners doing that particular qualification with your organisation.

Where no default units are set up for that qualification and organisation, the box is greyed out and therefore cannot be ticked and this pop up displays:

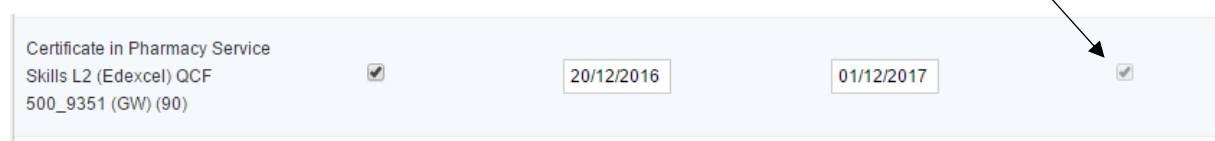


There are no default units defined for this qualification

Hairdressing NVQ 2 (18)	<input checked="" type="checkbox"/>	24/08/2016	01/02/2017	<input type="checkbox"/>
Housing Benefits NVQ (9)	<input type="checkbox"/>			<input type="checkbox"/>

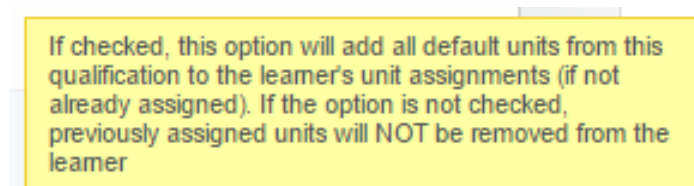
Where default units have been assigned to a qualification for your organisation the box is darker and able to be selected.

When the CA has ticked the box to assign default units and clicked save at the bottom of the page, the tick box will now remain ticked in the user profile, but it will now be greyed out so it can't be unticked.



Certificate in Pharmacy Service Skills L2 (Edexcel) QCF 500_9351 (GW) (90)	<input checked="" type="checkbox"/>	20/12/2016	01/12/2017	<input checked="" type="checkbox"/>
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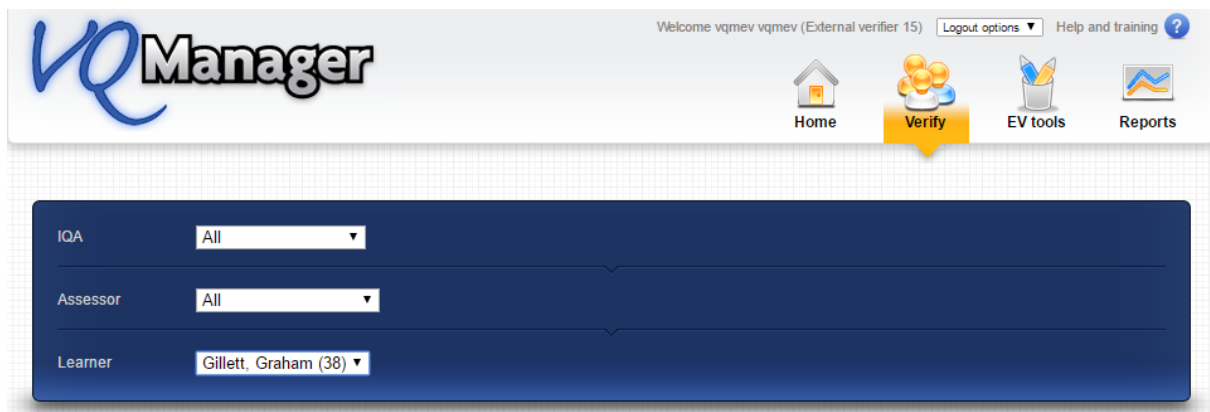
When you hover over the tick box this pop up displays.



If checked, this option will add all default units from this qualification to the learner's unit assignments (if not already assigned). If the option is not checked, previously assigned units will NOT be removed from the learner

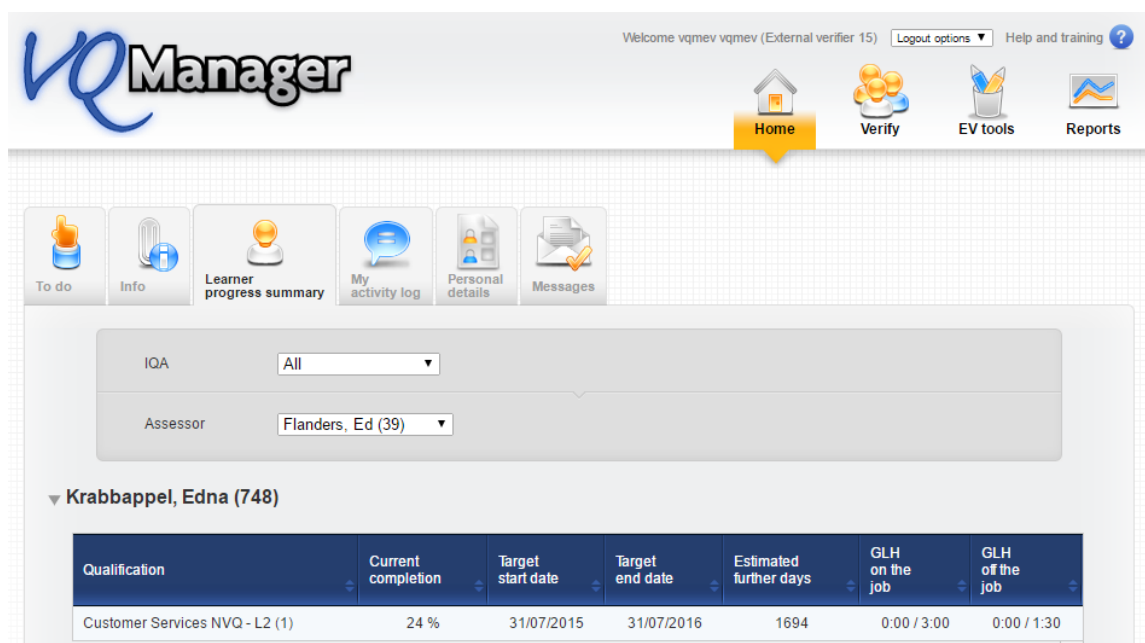
Simplification of EQA/EV selectors

On the Verify tab, in order to simplify the EQA/EV access to information, we have removed the requirement to select a Verifier or Assessor on all the tabs. The EV/EQA can select "All" in both these drop down categories. This means that as long as the EV/EQA has the correct verifiers, assessors and learners assigned to then they can go straight to the learner they wish to view, rather than needing to know which verifier and assessor to select to see the learner they are interested in.



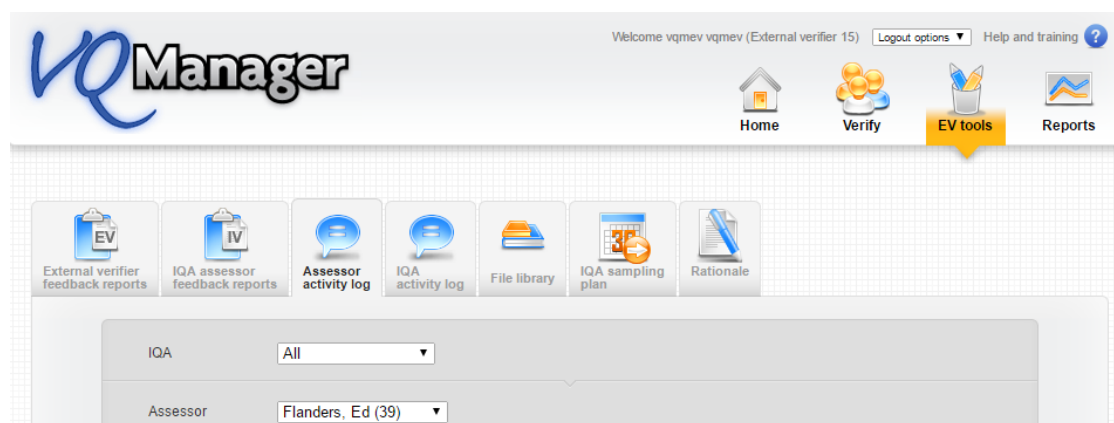
Learner Progress Summary:

We have added an “All” option in the IQA selector so this area can filter learners by assessor only.



Assessor Activity Log:

We have added an “All” option in the IQA/ IV selector so the EV/EQA can simply choose the progress reviews of any linked assessor.



Simplifying the setting of an assessor as trainee or qualified

In order to simplify this process we have added a new box in the “Roles” section of the “User profile” area for the Centre Administrator. It is now at this point where the CA selects whether the assessor is a trainee or a qualified one. You cannot tick both.

The screenshot shows the 'System information' section of a user profile. It includes fields for 'User name' and 'Password', a 'Force password change' checkbox, and a 'Status' section with radio buttons for 'Active', 'Disabled', and 'Archived'. The 'Roles' section is a table with two columns: 'Roles' and 'Default'. It lists 'Learner', 'Assessor' (with sub-options 'Qualified' and 'Trainee'), 'IQA', and 'External verifier'. The 'Trainee' checkbox under 'Assessor' is checked.

Roles		Default
Learner	<input type="checkbox"/>	<input type="radio"/>
Assessor		
Qualified	<input type="checkbox"/>	<input type="radio"/>
Trainee	<input checked="" type="checkbox"/>	<input type="radio"/>
IQA	<input type="checkbox"/>	<input type="radio"/>
External verifier	<input type="checkbox"/>	<input type="radio"/>

Instead of assigning the assessor to each qualification and selecting trainee or qualified, there is now just a single column to indicate which qualification/s they will be assessing. We will be running an update process to populate this column for all existing assessors on VQManager for your organisation.

The screenshot shows a table titled 'Assessor qualification assignments'. It has a header row 'Qualifications' and a table body with four rows of qualifications, each with a checkbox in the right-hand column.

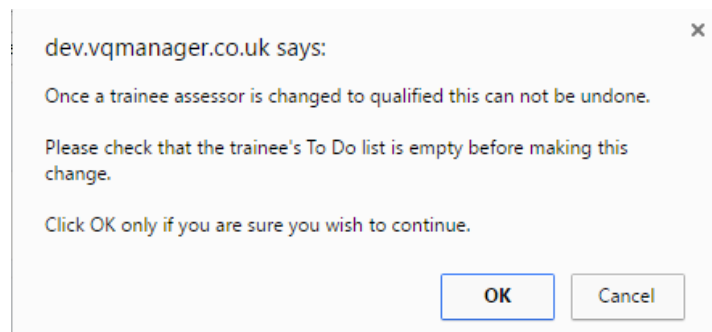
Qualifications	
Assessor Toolkit - Warehousing Apprenticeship L2 {linking test} (92)	<input checked="" type="checkbox"/>
BTEC Extended Diploma in Music Technology L3 {QCF} Edexcel 500_7716_8 (96)	<input checked="" type="checkbox"/>
BTEC in Hairdressing (Test) (76)	<input type="checkbox"/>
Certificate in Equality and Diversity L2 (NCFE) - question bank (102)	<input type="checkbox"/>

When the assessor becomes qualified the qualified box needs to be ticked. This will automatically remove the tick from the trainee box.

This close-up shows the 'Assessor (1641)' section. It has two rows: 'Qualified' with an unchecked checkbox and 'Trainee' with a checked checkbox. An arrow points to the 'Qualified' checkbox.

Assessor (1641)	
Qualified	<input type="checkbox"/>
Trainee	<input checked="" type="checkbox"/>

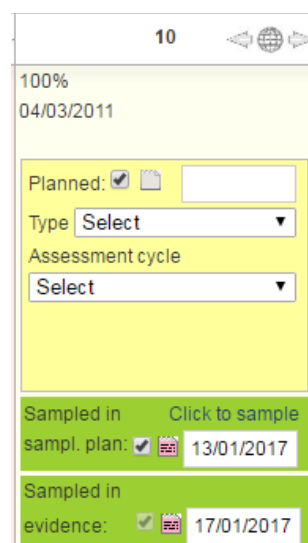
The trainee assessor's To Do list **must be empty before** making the change (if the assessor has work pending at the time of the change, it can make some evidence disappear from view for users). There is a pop up reminder for this.



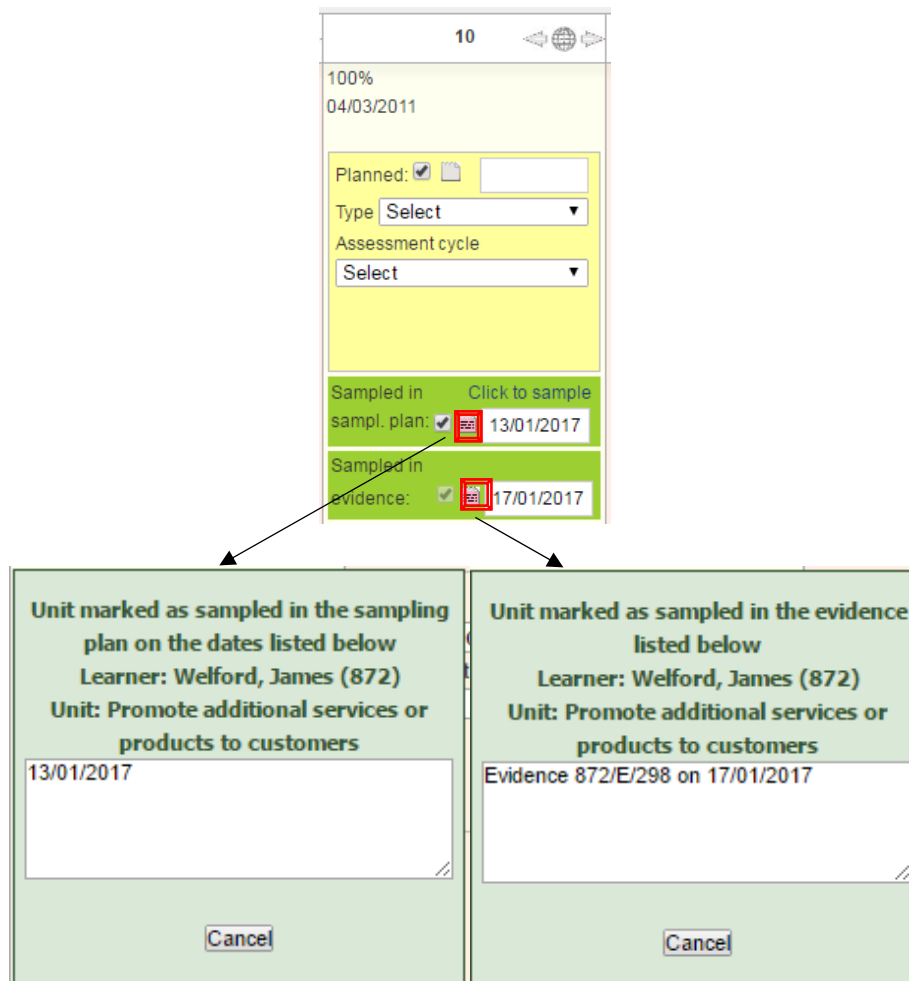
Note that it is not possible to change a qualified assessor to a trainee. If you need to do this, you will need to contact SkillWise.

Automatically updating sampling plan when evidence signed off by IQA/IV

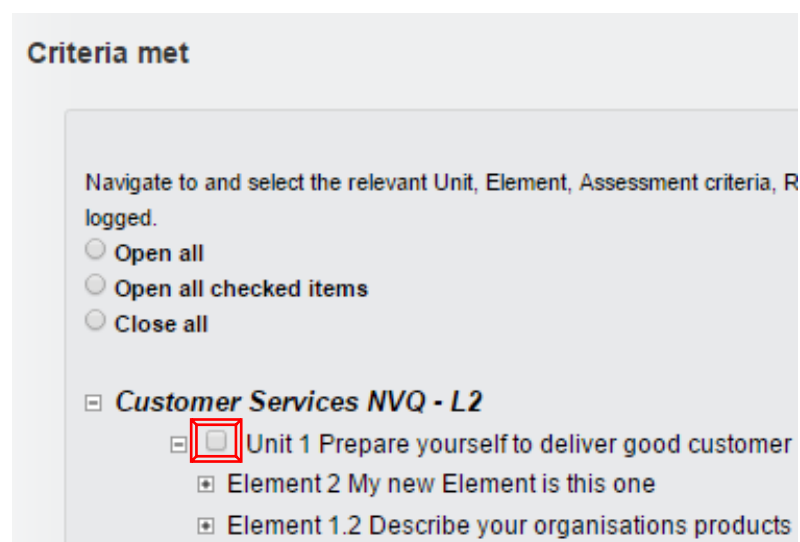
There is a new section within the sampling plan "sampled in evidence" which now allows for an automatic update to the plan when a piece of evidence is sampling for that unit. It is located below the existing "Sampled in sampling plan" section.



The idea of adding "Sampled in evidence" under the existing "Sampled in plan" checkbox in the sampling plan is to allow these two sections to function independently of each other and hopefully will also be easier for the IQA/IVs to view. By putting them in separate boxes, it shows users which dates were manually entered, and which were placed there by the system. 'Sampled in sampl. plan' for manual dates, and 'sampled in evidence' for automated dates.



When a piece of evidence is sampled but NO units are ticked as sampled within the evidence – nothing is recorded in the sampling plan.



When a piece of evidence is sampled and units are ticked as sampled within the evidence, dates are added to the new sampling section against all of the selected units.

Criteria met

Navigate to and select the relevant Unit, Element, Assessment criteria, F logged.

☐ Open all
☐ Open all checked items
☐ Close all

☒ **Customer Services NVQ - L2**

☒ Unit 1 Prepare yourself to deliver good customer

- ☒ Element 2 My new Element is this one
- ☒ Element 1.2 Describe your organisations products

When a unit is signed off this is still displayed at the top of the sampling plan cell. This doesn't pull through into the sampling area at the bottom. This has not changed.

5

100%

17/01/2017

17/01/2017

Planned: ☐ ☐

Type:

Assessment cycle:

Sampled in:

Sampl. plan:

The only exception to Unit sign off is if 'unit not sampled' is selected at Unit sign off, because that does go into the sampling area at the bottom. This has not changed.

5

100%

12/10/2016

Planned: ☐ ☐

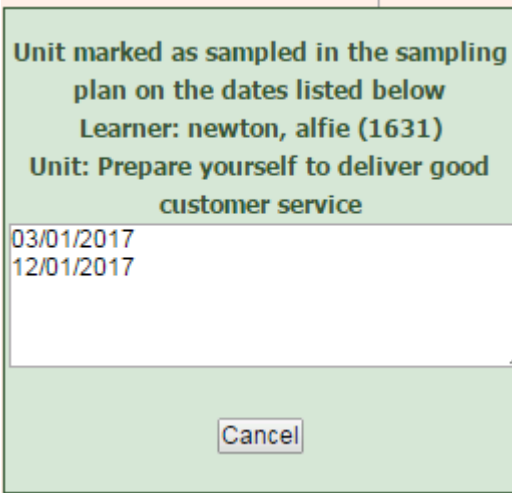
Type:

Assessment cycle:

Not sampled: ☒ 12/10/2016

The most recent date is displayed in the summary view. Previous dates can be viewed by clicking to view the audit trail. This will include the most recent date as well, for clarity.

We know that an IQA/IV may need to verify a unit in the sampling plan more than once and this is now possible without losing the information around the previous sampling. Multiple sampling events in the sampling plan plus audit trail is now available, but currently limited to one sampling per IV/learner/unit per day. See screenshot below for how the system records and displays multiple manual sampling dates.



A screenshot of a system dialog box with a light green background. The text inside is as follows:

Unit marked as sampled in the sampling plan on the dates listed below
Learner: newton, alfie (1631)
Unit: Prepare yourself to deliver good customer service

Below the text, there is a list of dates:
03/01/2017
12/01/2017

At the bottom of the dialog box, there is a button labeled "Cancel".