

IV/IQA Sampling Plans

The sampling plan is located in the "Internal verifier tools" tab

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VQ Manager

The internal verifier sampling plan allows internal verifiers to create a plan of which units for which qualification/ assessor/ learner combination that they plan to sample. It also allows the internal verifier to enter an anticipated date for the sample and records the actual date when evidence within the unit is sampled.

Internal verifier tools Reports

Internal verifier assessor feedback reports External verifier assessor feedback reports Assessor activity log File library Internal verifier sampling plan Rationale

Select assessor Adams, Julie (468)

Select qualification Customer Services NVQ L2 (1)

Select employer All

Select learner All

View plan - Normal View plan - Print friendly

A sampling plan can be set using the dropdowns in the grey area and can be filtered by:

- Assessor
- Qualification
- Employer
- Learner.

You are also able to select "All" assessors to allow you to create a sampling plan for all assessors managing a particular qualification. Please be aware this may take a few seconds to load as the plan created will be larger than normal.

Once the sampling plan is open the first column is fixed so that the learner's name is always visible. The unit number is repeated throughout the document so if you scroll down this too will always remain visible.

Tip: Click in any box and use the keyboard's arrows to navigate up or down, left or right. There is no need to scroll to the bottom to use the grey scroll bar to move left or right.

The sampling plan is divided into two areas. The first area (identified in turquoise) allows for a plan to be submitted which is learner specific but not unit specific.

Select "planned" and click in the field to the right, a pop up appears to enable a date to be specified for the planned sample.

Using the “Type” drop down, select either “Interim” or “Final”.

		Whole qualification
Gillett Graham (38)	0%	Planned: <input checked="" type="checkbox"/> 14/01/2015 Type: Select Asses: Select Sele: Interim Final Sampled: <input type="checkbox"/>

The sampling plan has different colours for interim versus final sampling. There is a third colour for situations where neither interim nor final has been selected.

Unit not assigned
 Unit assigned
 Assessor signed-off
 IQA signed-off
 Sample planned
 Interim sample
 Final sample
 Sample completed
 Not sampled

IQA sampling plan

		Whole qualification	1	5	6
ABC ABC (761)	0%	Planned: <input type="checkbox"/> Type: Select Assessment cycle: Select Sampled: <input type="checkbox"/>	7% Planned: <input checked="" type="checkbox"/> 04/10/2013 Type: Select Assessment cycle: Progress reviews Click to sample Sampled: <input checked="" type="checkbox"/> 04/10/2013	Planned: <input checked="" type="checkbox"/> Type: Interim Assessment cycle: Assessment plans Click to sample Sampled: <input type="checkbox"/>	Planned: <input checked="" type="checkbox"/> 02/10/2 Type: Final Assessment cycle: Evidence methods Click to select WP Click to sample Sampled: <input checked="" type="checkbox"/> 05/10/

From the “Assessment Cycle” select one of the following:

- Evidence methods
- Assessment plans
- Progress reviews
- Observation of assessor
- Sampling strategy
- Other (see notes)

		Whole qualification
Gillett Graham (38)	0%	<div style="background-color: #ffff00; padding: 5px;"> Planned: <input checked="" type="checkbox"/> <input type="checkbox"/> 14/01/2015 Type Interim ▼ Assessment cycle Select ▼ Select Evidence methods Assessment plans Progress reviews Observation of assessor Sampling strategy Other (see notes) </div>

If "Evidence methods" is selected you are then able to "Click to select" and then select one or more methods from the new pop up (modelled on your centre's "Log evidence" tab).

		Whole qualification
Gillett Graham (38)	0%	<div style="background-color: #ffff00; padding: 5px;"> Planned: <input checked="" type="checkbox"/> <input type="checkbox"/> 14/01/2015 Type Interim ▼ Assessment cycle Evidence methods ▼ <u>Click to select</u> <input type="text"/> Sampled: <input type="checkbox"/> </div>

		Whole qualification	1	5									
Gillett Graham (38)	0%	Planned: <input checked="" type="checkbox"/> <input type="checkbox"/> 14/01/2015 Type: Interim Assessment cycle: Evidence methods	Planned: <input type="checkbox"/> <input type="checkbox"/> Type: Select Assessment cycle: Select	Planned: <input type="checkbox"/> <input type="checkbox"/> Type: Select Assessment cycle: Select									
		<div style="border: 1px solid black; padding: 10px; background-color: #e0f2f1;"> <p align="center">IV sampling plan evidence methods Learner: Gillett, Graham (38) Unit: Whole qualification</p> <table border="0"> <tr> <td><input type="checkbox"/> Work products</td> <td><input type="checkbox"/> Direct observation</td> </tr> <tr> <td><input type="checkbox"/> Witness testimony</td> <td><input type="checkbox"/> Oral questions</td> </tr> <tr> <td><input type="checkbox"/> Written questions</td> <td><input type="checkbox"/> Candidate feedback statement</td> </tr> <tr> <td><input type="checkbox"/> Simulation / storyboard</td> <td><input type="checkbox"/> Accredited prior learning</td> </tr> <tr> <td><input type="checkbox"/> Professional discussion</td> <td></td> </tr> </table> <p align="right">OK Cancel</p> </div>				<input type="checkbox"/> Work products	<input type="checkbox"/> Direct observation	<input type="checkbox"/> Witness testimony	<input type="checkbox"/> Oral questions	<input type="checkbox"/> Written questions	<input type="checkbox"/> Candidate feedback statement	<input type="checkbox"/> Simulation / storyboard	<input type="checkbox"/> Accredited prior learning
<input type="checkbox"/> Work products	<input type="checkbox"/> Direct observation												
<input type="checkbox"/> Witness testimony	<input type="checkbox"/> Oral questions												
<input type="checkbox"/> Written questions	<input type="checkbox"/> Candidate feedback statement												
<input type="checkbox"/> Simulation / storyboard	<input type="checkbox"/> Accredited prior learning												
<input type="checkbox"/> Professional discussion													

If "Other, (see notes)" is selected, please use the "notes" area to stipulate your intentions. The notes icon changes to include writing if notes have been added so it is easy to identify whether notes have been added or not when closed.

		Whole qualification			Whole qualification
Gillett Graham (38)	48%	Planned: <input checked="" type="checkbox"/> <input type="checkbox"/> 14/01/2015 Type: Interim Assessment cycle: Other (see notes)			Planned: <input checked="" type="checkbox"/> <input type="checkbox"/> 14/01/2015 Type: Interim Assessment cycle: Other (see notes)
		Sampled: <input type="checkbox"/>			Sampled: <input type="checkbox"/>

		Whole qualification	1	5
Gillett Graham (38)	0%	IV sampling plan notes Learner: Gillett, Graham (38) Unit: Whole qualification <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;">Write my intentions here</div> <div style="text-align: right; margin-top: 5px;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div>		

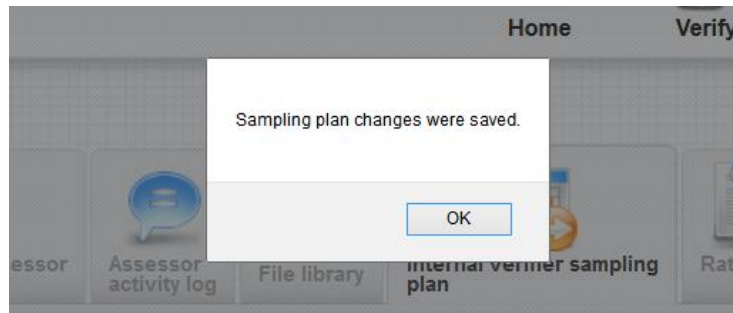
Click on the “world” icon in the top right hand corner of each unit to activate the zoom out.

By clicking in a specific cell the pop up will close and you will be taken directly to that cell.

Always make sure you “save” any additions or changes you make.

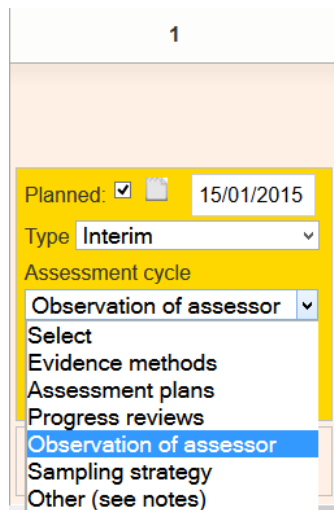


You will see a pop up advising you that any additions or changes you have made have been saved.



If you intend to sample a specific unit, the process and all the options are exactly the same:

- Select the unit
- Add a date
- Select interim or final
- Select assessment cycle option
- Add notes if required
- Save



For an IV with many learners, it's hard for you to keep track of all the dates you've put in the sampling plan, so you run quite a risk of overlooking planned dates and thus falling foul of the awarding body. There is a built in reminder on the IV home page (very much like the one which

reminds learners of overdue assessment plan dates) which shows the IV sampling that is due within the next 5 days. If you overshoots this date the reminder turns red.

The screenshot shows the VQ Manager interface. At the top, there's a navigation bar with 'Home', 'Verify', 'Internal verifier tools', and 'Reports'. Below this is a 'To do' section with icons for 'Info', 'Learner progress summary', 'Personal details', and 'Messages'. The main content area is titled 'Evidence saved for further work' and contains a table with columns: Learner, Date saved, Evidence number, Qualification, External verifier, and Internal verifier. Below this is a section for 'Upcoming (next 5 days) and overdue sampling plan dates' with a table containing columns: Planned date, Learner, Unit, Type, Assessment cycle, Evidence methods, and Remove. A 'Sample' link is visible in the 'Remove' column for the entry dated 16/12/2011. An arrow points to this 'Sample' link.

To go to the unit to be sampled, select the “sample” link and the unit to be sampled will appear.

This screenshot shows the 'Unit status, evidence matrix and signoff' page. It features a navigation bar with icons for 'Unit assignments', 'Assessment plans', 'Evidence list', 'Question bank', 'Progress reviews', 'Unit status, evidence matrix and signoff', 'Qualification status and signoff', 'Learner activity log', and 'Search evidence'. Below the navigation bar are several checkboxes for filtering the evidence matrix, including 'Date', 'Assessor', 'Summary', 'Description', 'Internal verifier date', 'EV date', 'Method', 'Performance criteria', 'Range statement', and 'Knowledge and understanding'. The main content area displays the following information:

- Evidence matrix; Gillett, Graham; Business Administration NVQ Level 2
- Unit: 110 (110) Ensure your own actions reduce risks to health and safety (ENTO)
- Element: 3.1 Identifying hazards and evaluating risks

Below this information is a table representing the evidence matrix. The table has columns for 'Evidence', 'Summary', 'Internal verifier date', 'Method' (1-9), 'Performance criteria' (A-F), 'Range statement' (1-3), and 'Knowledge and understanding' (1-11). The data shows a 'Vq mobile test' with a '0%' completion rate and a 'Recommended minimum' of 1 for each criterion.

The page also has a section which pulls through all the notes you may have made on the sampling plans (eg it's an interim sample, and that you intend to sample Observations).

The page also includes a "Sampled" check box and date selector for the actual sampled date and these dates save back into the sampling plan. This saves you having to go back to the sampling plan to indicate that they have sampled.

▼ Internal verifier sampling

Sampled

Date sampled: 18/06/2014

Sampling notes
Note from the sampling plan

▼ Internal verifier sign-off

Internal verifier evidence rating

Valid

Current

Authentic

Sufficient

Relevant

Unit not sampled

I confirm that the candidate's sampled work meets the standards specified for this unit and may be presented for external verification and/or certification.

Save and write assessor feedback report Save and go to sampling plan Cancel

There is also a check box when you sign a unit off called “unit not sampled”. This allows you to sign off the units without declaring that you have checked all the content.

Internal verifier evidence rating

Valid

Current

Authentic

Sufficient

Relevant

Mark all

Unit not sampled

I confirm that the candidate's sampled work meets the standards specified for this unit and may be presented for external verification and/or certification.

Save and write assessor feedback report Save and go to sampling plan Save Cancel

When you tick the “unit not sampled” box when signing off a unit, the lower part of the sampling plan unit box goes blue automatically. This will allow you to look at the sampling plan and know that if the unit is signed off that it has not actually been verified.

Internal verifier sampling plan

		Whole qualification	1	2	3
Leigh Krista (96738)	100% 31/07/2014	100% 31/07/2014	100% 31/07/2014		
		Planned: <input type="checkbox"/> <input type="checkbox"/> Type: Select Assessment cycle: Select Select	Planned: <input type="checkbox"/> <input type="checkbox"/> Type: Select Assessment cycle: Select Select	Planned: <input type="checkbox"/> <input type="checkbox"/> Type: Select Assessment cycle: Select Select	Planned: <input type="checkbox"/> <input type="checkbox"/> Type: Select Assessment cycle: Select Select
		Sampled: <input type="checkbox"/>	Not sampled: <input checked="" type="checkbox"/> 19/08/2014	Click to sample Sampled: <input type="checkbox"/>	Click to sample Sampled: <input type="checkbox"/>
		Whole qualification	1	2	3

When you have sampled it, the reminder disappears from the home page.

If you see the reminder but the intended sampling is no longer relevant, you can delete it from the reminder list although the sampling plan view continues to show as your recorded intention.

Upcoming (next 5 days) and overdue sampling plan dates

Planned date	Learner	Unit	Type	Assessment cycle	Evidence methods	Remove
16/12/2011	Gillett, Graham (38)	(110) Ensure your own actions reduce risks to health and safety (ENTO)				<input checked="" type="checkbox"/> Sample

[Remove the selected items from this page](#)

Upcoming (next 5 days) and overdue sampling plan dates

Planned date	Learner	Unit	Type	Assessment cycle	Evidence methods	Remove
16/12/2011	Gillett, Graham (38)	(110) Ensure your own actions reduce risks to health and safety (ENTO)				<input type="checkbox"/>

[Remove the selected items from this page](#)

Items removed from here will remain in your sampling plan

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.

100%
04/03/2011

Planned:

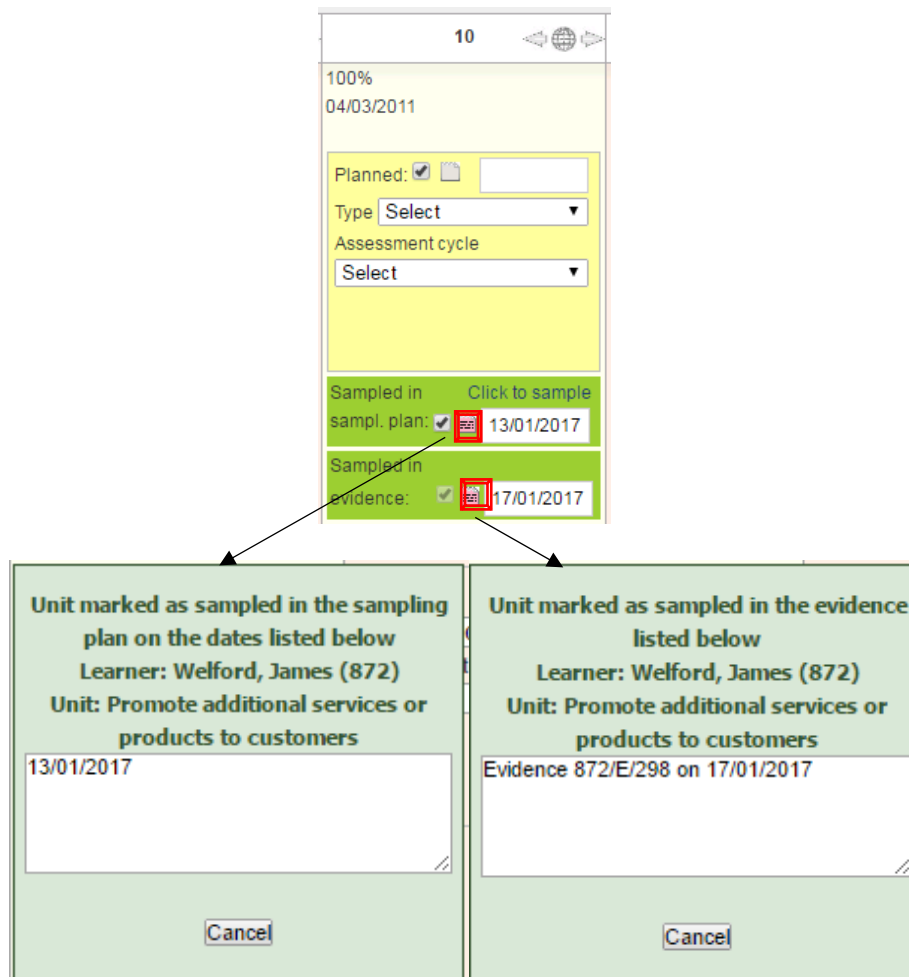
Type: Select

Assessment cycle: Select

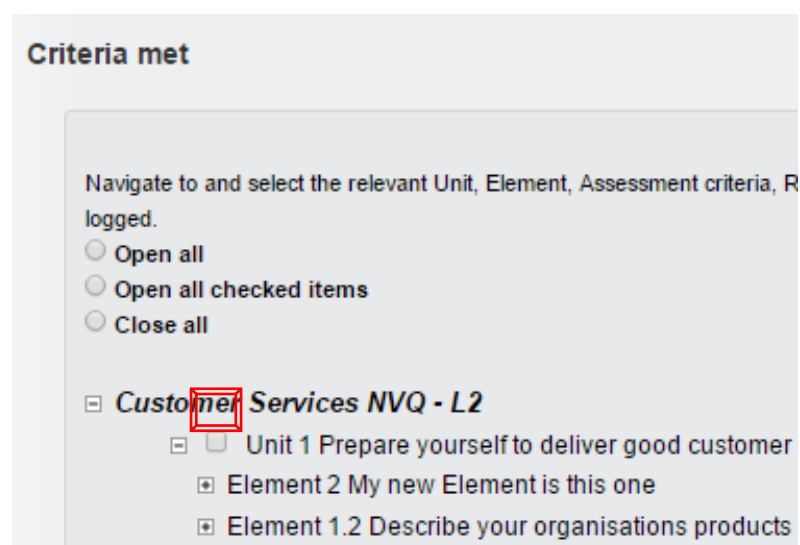
Sampled in: Click to sample
sampl. plan: 13/01/2017

Sampled in evidence: 17/01/2017

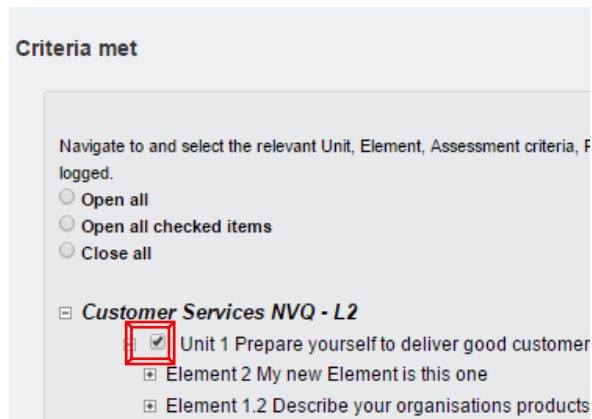
The idea of adding "Sampled in evidence" under the existing "Sampled in plan" checkbox in the sampling plan is to allow these two sections to function independently of each other and hopefully will also be easier for the IQA/IVs to view. By putting them in separate boxes, it shows users which dates were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



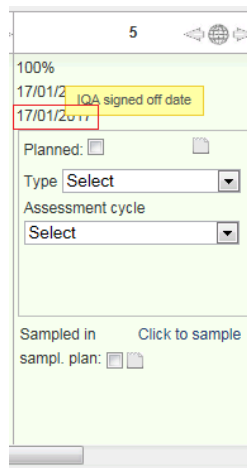
When a piece of evidence is sampled but NO units are ticked as sampled within the evidence – nothing is recorded in the sampling plan.



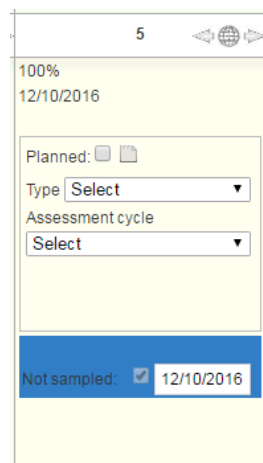
When a piece of evidence is sampled and units are ticked as sampled within the evidence, dates are added to the new sampling section against all of the selected units.



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.



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.



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.

