

## VQManager Enhancement February 2021

### Adding a note to Progress Review tab to remind users what to write – centre switch

We have added a centre switch so that a text field can be populated to instruct assessors in the **Progress Review** tab to remind them what information they need to gather. The script will be created by the centre – (it will be the same for all assessors) and will be added behind the scenes by SkillWise.

Here is an example of a text box which has been created. The additional text is only visible to the assessor when creating a new review, or completing a pre-set review.

The screenshot shows the 'Add new progress review' form. It includes fields for 'Summary', 'Planned date' (08/02/2021), 'Set planned date to' (dropdown), 'Actual date' (08/02/2021), and a checkbox for 'Review to be completed in future'. A red box highlights the 'Must include' section, which lists the following items:

- Discussion overview
- Action plan
- ES Comments
- Any ES/trainee concerns
- OTJ Check

Below this list is a 'Notes (max. 1000 words)' field with a rich text editor toolbar.

In the below slide, I have copied the text and dropped it into the **Notes** field to create categories for easy completion. This is just a suggestion.

The screenshot shows the 'Notes (max. 1000 words)' field with the 'Must include' list pasted into it. The text is as follows:

Must include:  
- Discussion overview  
my notes  
- Action plan  
my notes  
- ES Comments  
my notes  
- Any ES/trainee concerns  
my notes  
- OTJ Check  
my notes

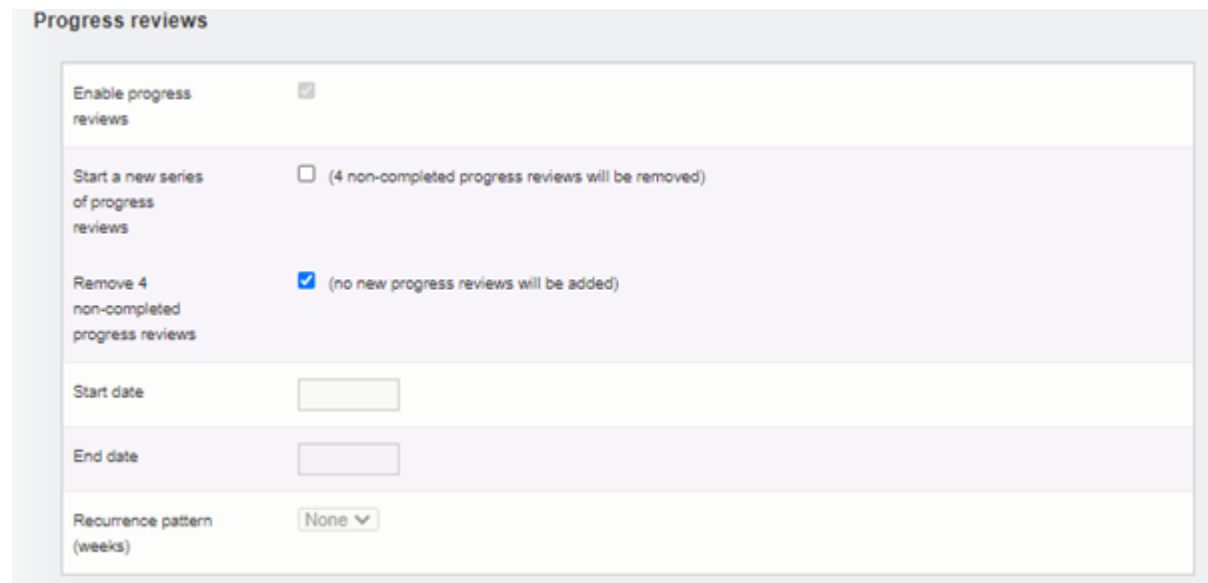
The word count at the bottom right is 28/1000 words.

Once the review is saved, the text box disappears:



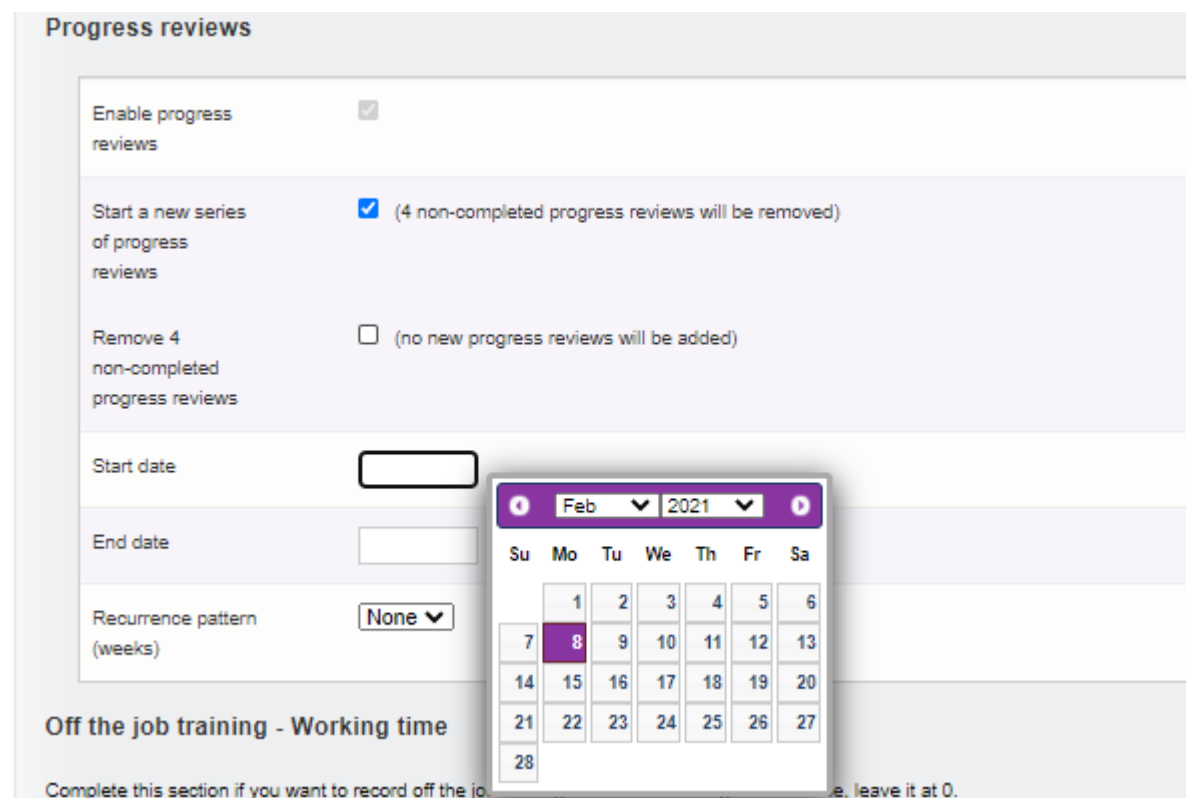
### Allowing CA to alter a pre-set sequence of Progress Reviews - removing previous set without creating a new one

We have added a second scenario when removing pre-set **Progress reviews** in the user tab. Currently the system requires you to add a new set when removing an old one, but we realise this isn't always the case. You can now delete an old series and save those changes without setting up a new set of reviews.



The screenshot shows the 'Progress reviews' configuration form. The 'Enable progress reviews' checkbox is checked. The 'Start a new series of progress reviews' checkbox is unchecked, with the text '(4 non-completed progress reviews will be removed)' next to it. The 'Remove 4 non-completed progress reviews' checkbox is checked, with the text '(no new progress reviews will be added)' next to it. Below these are fields for 'Start date', 'End date', and a 'Recurrence pattern (weeks)' dropdown menu set to 'None'.

The dates and recurrence pattern fields will only be activated and required if **Start new** is selected.



This screenshot shows the same 'Progress reviews' form, but with the 'Start a new series of progress reviews' checkbox selected. The 'Remove 4 non-completed progress reviews' checkbox is now unchecked. A date picker is open over the 'Start date' field, showing the month of February 2021. The date '8' is highlighted. Below the form, there is a section titled 'Off the job training - Working time' with a note: 'Complete this section if you want to record off the job training. If not, leave it at 0.'

### Preventing users selecting an end date that is before the start date in the Diary

In the **Diary**, there has been a small adjustment to prevent mistakes being made. You cannot now add an end date that is before the start date. Being able to do this previously affected the OTJ calculations and we want to eliminate this problem.

When selecting an **End date**, dates before the **Start date** are now greyed out in the calendar selector.

### Changing centre so that assessors can edit learner's personal details and learners can't - centre switch

Some learners have been changing or not entering accurately their personal details information into the system. We have added a switch so that if you would like to disable the ability for your learners to alter their own details, and instead allow the assessors to do this, this can now be done. If switched, in the **Learner details** tab the assessor is be able to edit the following fields:

- Title
- Name
- Date of birth
- Gender
- Home postcode
- Address
- Current postcode
- Country of domicile
- Phone numbers
- E-mail address

Other fields are completed by a Centre Admin, as now.

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[Home](#) [My students](#) [Assessment tools](#) [Reports](#)

Student: Welford, James (872)

Unit assignments | Assessment plans | Log evidence | Evidence list | Learner diary | Question bank | Progress reviews | Unit status, evidence matrix & signoff | Qualification status & signoff | Learner activity log | Student details | Search evidence

Title: None

Forename: James

Surname/ family name: Welford

This development is available upon request. Please contact us to have this changed for your organisation.

#### Making sure Evidence list defaults to 'all'

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Qualification: All

Unit: All units

Method: All methods

We have improved the Evidence list page so that it now always initially displays with the **All** option in the dropdowns. Client feedback has shown, especially with learners, that where filters are applied by virtue of previously visited pages, users were missing items that potentially needed their attention.

### Adding a link for users to tick all criteria in an assessment plan

There is now a new link in the **Log evidence** page in the **Criteria met** section to speed up the logging of evidence against assessment plans. This is available to both learners and assessors. Clicking on **tick all criteria in this plan** will populate all of the criteria the selected plan covers.

**Criteria met**

As a tutor you may choose to [accept all student ticks.](#)

Select the relevant assessment plan against which the evidence is to be logged or navigate to the relevant Unit, Element, Assessment criteria, Range or Knowledge and Understanding item.

☐ Wil\_2015\_03\_06 Test AP 1 [view plan](#) **tick all criteria in this plan**

☐ Show gaps

☐ Open all and show gaps

☐ Open all

☐ Open all checked items

☐ Open all linked items

☐ Close all

☒ **Customer Services NVQ - L2**

Clicking on the new link also opens up the qualification tree to display all the ticked criteria.

☐ Wil\_2015\_03\_06 Test AP 1 [view plan](#) [tick all criteria in this plan](#)

☐ Show gaps

☐ Open all and show gaps

☐ Open all

☐ Open all checked items

☐ Open all linked items

☐ Close all

☒ **Customer Services NVQ - L2**

☒ Unit 1 Prepare yourself to deliver good customer service ☒

☒ Unit 5 Provide customer service within the rules ☒

☒ Element 5.1 Follow organisation procedures

☒ Performance criteria 5.1 ☒

☒ A Follow organisational procedures and instructions in a willing and helpful way

☒ B Recognise the limits of what you are allowed to do

This is likely to be met by the same evidence as meeting 5.1A

☒ C Refer to somebody in authority when you need to

This is likely to be met by the same evidence as meeting 5.1A

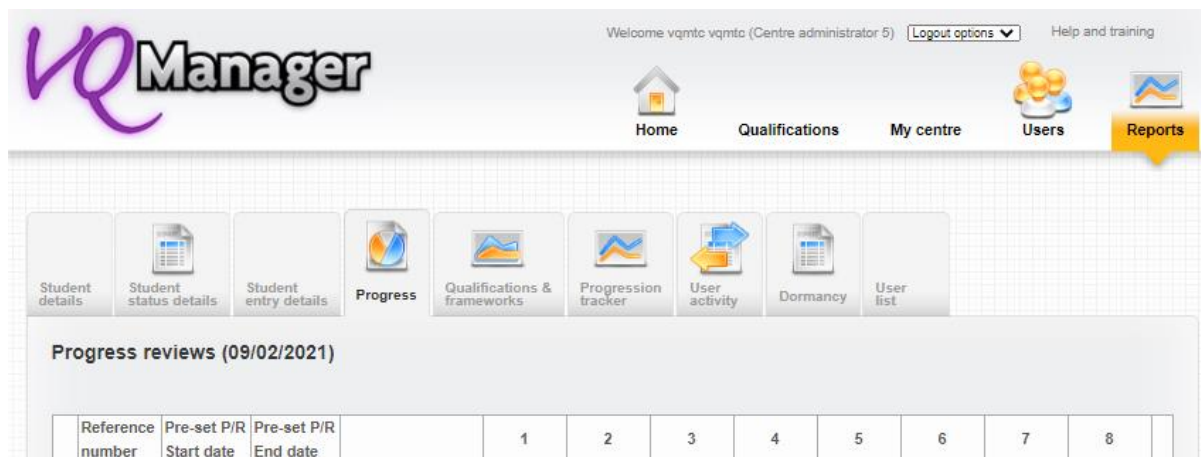
☒ D Work in a way that protects the security of customers and their property

Users can still change the criteria ticks (untick any not met or tick additional criteria if required), prior to saving the evidence. They can also select more than one assessment plan in a single evidence record. This function works in the same way as the existing quick tick function.

☒ ☐

### Changing column headings in Progress Review report for clarity

We have altered the headings for the start and end date columns in the Centre Admin's **Progress review** report. **Start date** becomes **Pre-set P/R start date** and **End date** becomes **Pre-set P/R end date**. This is to avoid confusion with the qualification start and end dates, which are not included in this report.

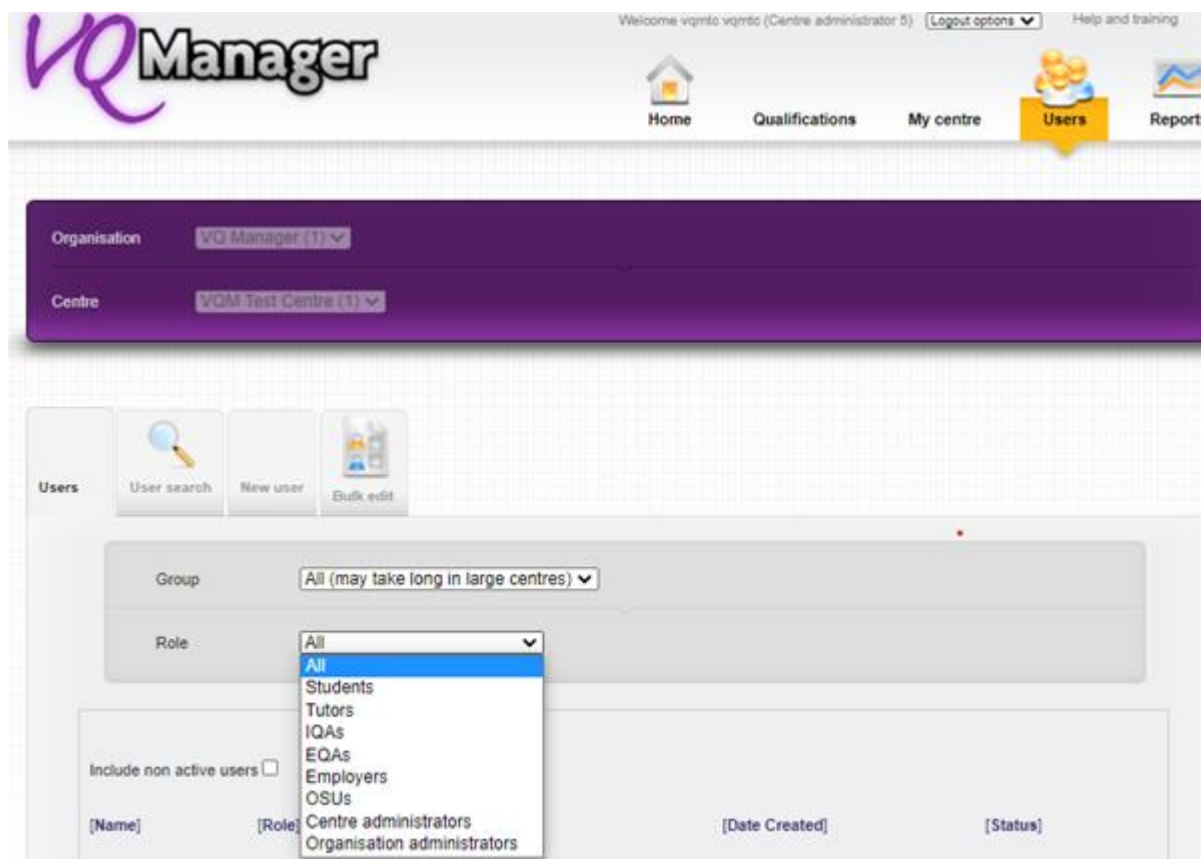


The screenshot shows the VQManager interface. At the top, there's a navigation bar with 'Home', 'Qualifications', 'My centre', 'Users', and 'Reports'. Below this is a grid of icons for various functions: Student details, Student status details, Student entry details, Progress, Qualifications & frameworks, Progression tracker, User activity, Dormancy, and User list. The 'Progress' icon is highlighted. Below the grid, there's a section titled 'Progress reviews (09/02/2021)'. It contains a table with the following columns: Reference number, Pre-set P/R Start date, Pre-set P/R End date, and eight numbered columns (1-8).

Reference number	Pre-set P/R Start date	Pre-set P/R End date	1	2	3	4	5	6	7	8
------------------	------------------------	----------------------	---	---	---	---	---	---	---	---

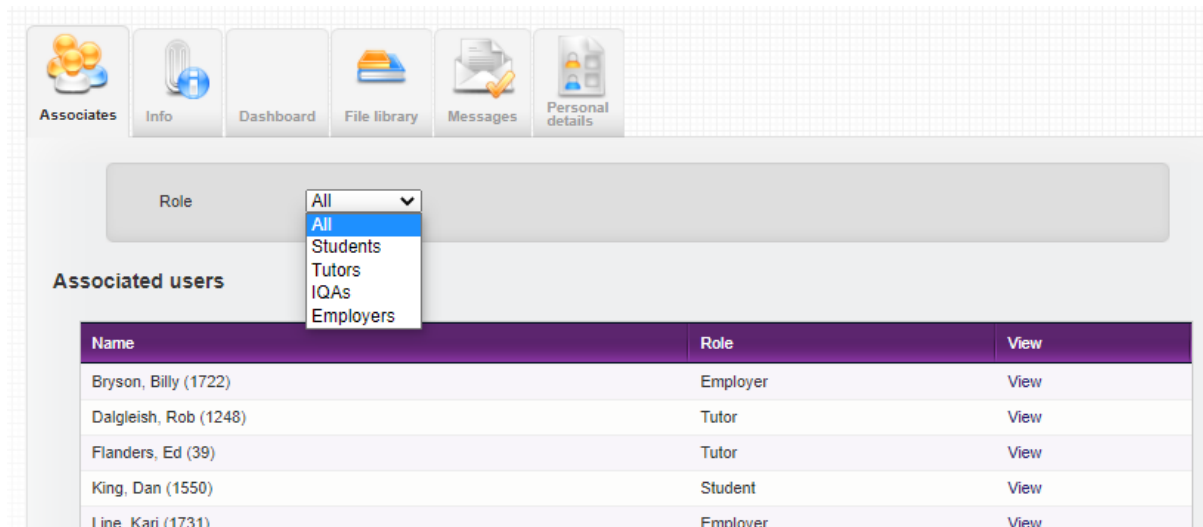
### Adding filter by role to user lists - Admins and OSU

We have added a **Role** filter in the **Users** list for Centre and Org Admins. This will make it easier to navigate this list, and quicker to find the user you are looking for.



The screenshot shows the VQManager interface with the 'Users' section selected. At the top, there's a navigation bar with 'Home', 'Qualifications', 'My centre', 'Users', and 'Reports'. Below this is a purple header bar with 'Organisation' and 'Centre' dropdowns. The 'Users' section has a 'User search' icon, a 'New user' button, and a 'Bulk edit' button. Below these, there's a 'Group' dropdown set to 'All (may take long in large centres)'. The 'Role' dropdown is open, showing a list of roles: All, Students, Tutors, IQAs, EQAs, Employers, OSUs, Centre administrators, and Organisation administrators. There's also an 'Include non active users' checkbox. At the bottom, there are columns for '[Name]', '[Role]', '[Date Created]', and '[Status]'.

A similar filter is available to Other System Users.



Role: **All** (dropdown menu open showing: All, Students, Tutors, IQAs, Employers)

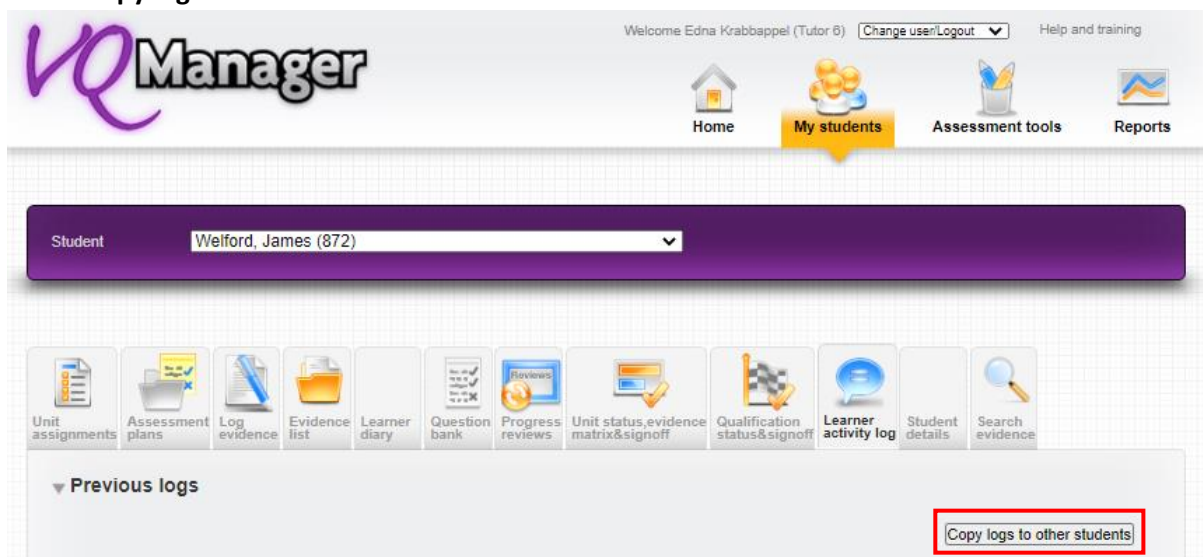
**Associated users**

Name	Role	View
Bryson, Billy (1722)	Employer	<a href="#">View</a>
Dalglish, Rob (1248)	Tutor	<a href="#">View</a>
Flanders, Ed (39)	Tutor	<a href="#">View</a>
King, Dan (1550)	Student	<a href="#">View</a>
Line, Kari (1731)	Employer	<a href="#">View</a>

### Showing on screen where Activity Log has already been copied to a learner

This development is a small amendment to the sharing of Activity logs we completed last time. We had already prevented the same log being copied to the same learner more than once and now this is shown on the page itself. It is similar to the assigning assessment plans notifications.

Select **Copy logs to other students** link



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**VQManager**

Home My students Assessment tools Reports

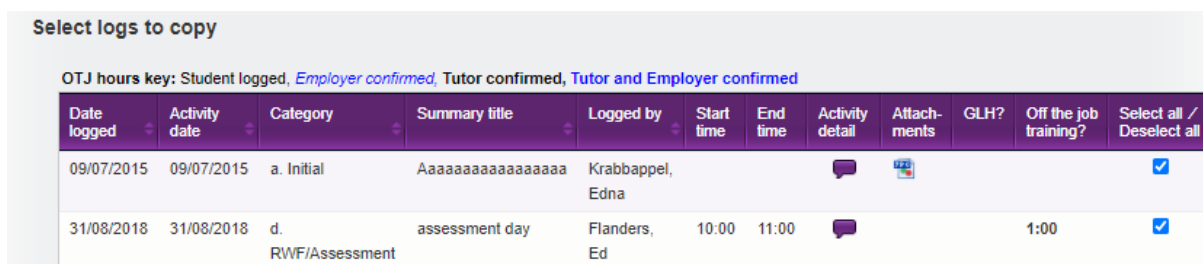
Student: **Welford, James (872)**

Unit assignments Assessment plans Log evidence Evidence list Learner diary Question bank Progress reviews Unit status, evidence matrix & signoff Qualification status & signoff **Learner activity log** Student details Search evidence

▼ Previous logs

[Copy logs to other students](#)

Select the log/s to copy:



**Select logs to copy**

OTJ hours key: Student logged, Employer confirmed, Tutor confirmed, Tutor and Employer confirmed

Date logged	Activity date	Category	Summary title	Logged by	Start time	End time	Activity detail	Attachments	GLH?	Off the job training?	Select all / Deselect all
09/07/2015	09/07/2015	a. Initial	Aaaaaaaaaaaaaaaaaa	Krabbappel, Edna							<input checked="" type="checkbox"/>
31/08/2018	31/08/2018	d. RWF/Assessment	assessment day	Flanders, Ed	10:00	11:00				1:00	<input checked="" type="checkbox"/>



Now the system not only won't allow you to share the log twice, but also shows you, of the logs to share, how many that learner has already been given.

Select students for copying to

Student	Qualification	Employer	Curriculum area	Institution	Selected logs already applied to student	Select all / Deselect all
2016_12_16_L_1, 2016_12_16_L_1 (1639)	Customer Services NVQ - L2 (1)				2 of 2	
2017_02_16_Wil_test_L_1, 2017_02_16_Wil_test_L_1 (1643)	Management NVQ - L3 (2)				2 of 2	
AAA111, AAA111 (968)	Housing Benefits NVQ (9); Key Skills (15)	Boots UK Ltd	Construction			<input type="checkbox"/>
ABC, ABC	Customer Services NVQ - L2 (1);	Boots UK	Business			<input type="checkbox"/>

### Showing IQA dates in evidence matrix for units ticked as being sampled

Where a piece of evidence covers criteria from several units, the IQA may only have looked at the evidence with regards to one or some of those units when sampling. This improvement allows that to be seen in the evidence matrix, as well as the sampling plan.

Where the IQA ticks a unit as sampled in the evidence

☐ **Certificate in Warehousing and Storage L2 (QCF) (Edexcel) 501\_1061\_5**

- ☐ Unit 1 Health, safety and security at work
- ☒ Unit 2 Develop effective working relationships with colleagues in logistics operations
  - ☐ Learning outcome 1 know how to develop effective working relationships with colleagues in logistics operations
    - ☐ **Assessment criteria 1**
      - ☐ ☒ 1 explain the relevant organisational policies and procedures for developing effective working relationships in logistics operations that relate to: health, safety and security
      - ☐ ☒ 2 explain the relevant organisational policies and procedures for developing effective working relationships in logistics operations that relate to: quality standards
      - ☐ ☒ 3 explain the relevant organisational policies and procedures for developing effective working relationships in logistics operations that relate to: confidentiality
      - ☐ ☒ 4 explain the relevant organisational policies and procedures for developing effective working relationships in

a sampled date is now shown in the evidence matrix, alongside the dates of each interaction of the IQA with this evidence. If the IQA has interacted with the evidence more than once, the earliest sampling date is displayed.

**Chang, Chantel Jade**  
**Certificate in Warehousing and Storage L2 (QCF) (Edexcel) 501\_1061\_5**

Unit: 2 Develop effective working relationships with colleagues in logistics operations

Tutor sign off date: 22/06/2015

IQA sign off date:

Learning outcome: 1 know how to develop effective working relationships with colleagues in logistics operations

Evidence	Summary	IQA dates	Method										Assessment criteria									
			1	2	3	4	5	6	7	8	9	10	1	2	3	4	1.2	1.3	1.4	1.5	1.6	
703/E/989	Unit 2 storyboard	10/11/2016(verified) 08/03/2019(returned) <div>10/11/2016(sampled)</div> View / Re-verify							1				1	1	1	1	1	1	1	1	1	
703/E/990	Unit 2 witness	10/11/2016(returned) 10/11/2016(returned) 10/11/2016(returned) 10/11/2016(returned) 18/01/2021(verified) 10/11/2016(sampled) View / Re-verify		1									1	1	1	1	1	1	1	1	1	
703/E/991	Unit 2 PD	Verify									1		1	1	1	1	1	1	1	1	1	
703/E/1266	Products	09/02/2021(returned) View / Re-verify	1										1	1	1	1						
Total			1	1					1		1		4	4	4	4	3	3	3	3	3	
Recommended minimum													1	1	1	1	1	1	1	1	1	