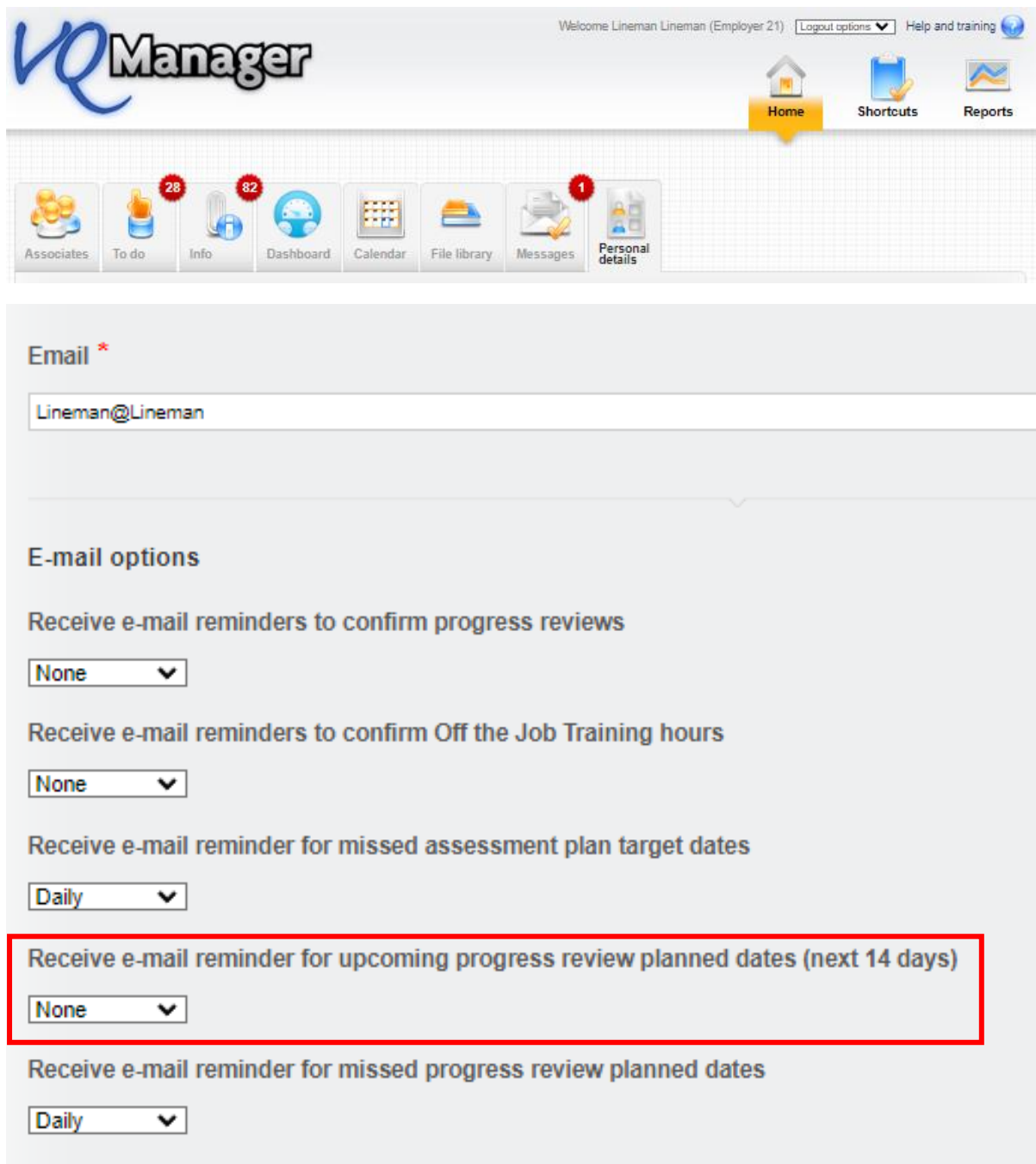


VQManager Enhancements March 2023

Adding opt-in e-mail notification for line managers of upcoming progress reviews

We have added an opt-in e-mail for Line Managers, to let them know when a progress review is coming up. The notification is located in the **Personal Details** Tab alongside other opt in notifications.



The screenshot displays the VQManager web application interface. At the top, the 'VQManager' logo is on the left, and the user 'Lineman Lineman (Employer 21)' is logged in. Navigation icons for Home, Shortcuts, and Reports are visible. A horizontal menu contains icons for Associates, To do (28), Info (82), Dashboard, Calendar, File library, Messages (1), and Personal details. The 'Personal details' section is active, showing the email 'Lineman@Lineman'. Under 'E-mail options', there are five notification settings, each with a dropdown menu. The option 'Receive e-mail reminder for upcoming progress review planned dates (next 14 days)' is highlighted with a red rectangle and currently set to 'None'.

Email *

Lineman@Lineman

E-mail options

Receive e-mail reminders to confirm progress reviews

None ▼

Receive e-mail reminders to confirm Off the Job Training hours

None ▼

Receive e-mail reminder for missed assessment plan target dates

Daily ▼

Receive e-mail reminder for upcoming progress review planned dates (next 14 days)

None ▼

Receive e-mail reminder for missed progress review planned dates

Daily ▼

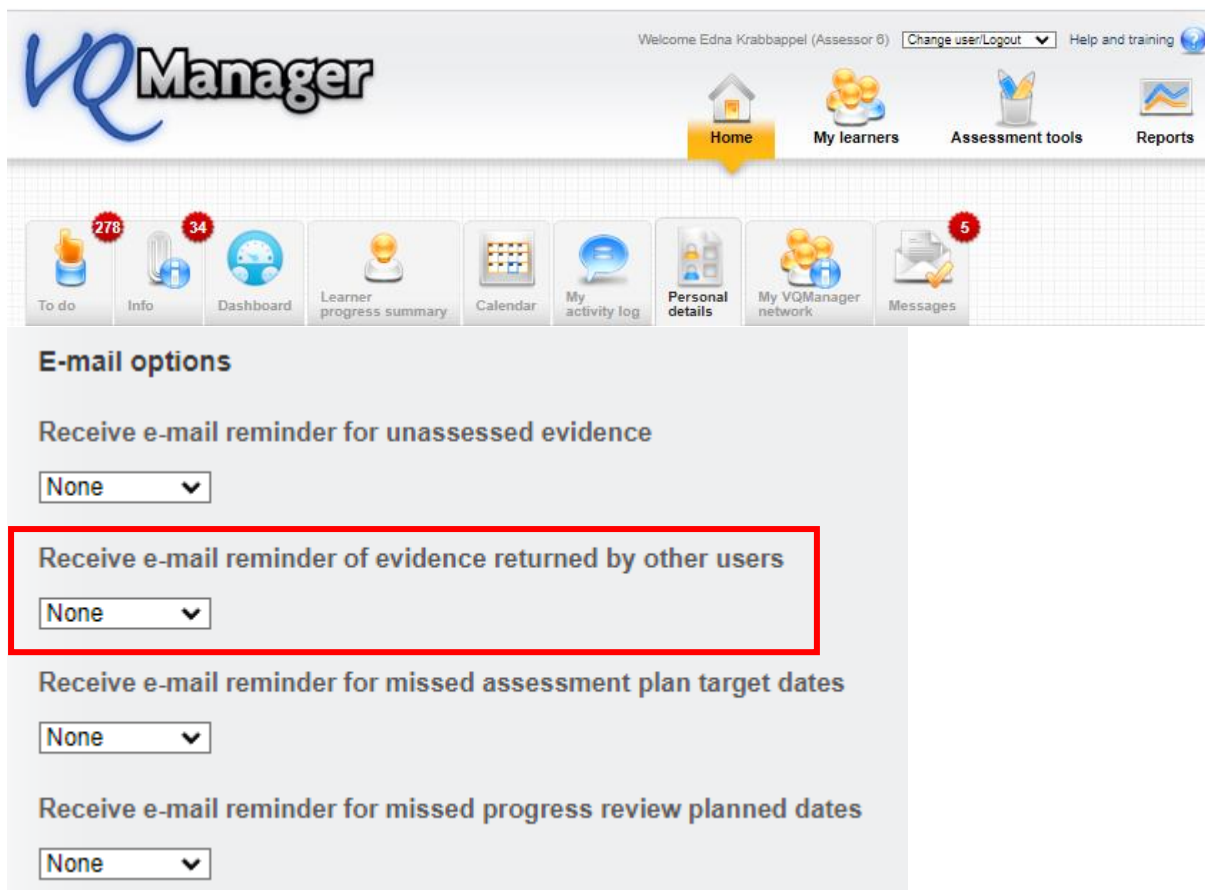
It has the same options as the other reminders in this category.

None ▾
None
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Daily

Here are the full details of the email summary notifications: <https://skillwise.net/wp-content/uploads/2023/02/Email-Summary-Notifications-V3.pdf>

Adding an opt-in notification for assessors of evidence returned

We have added a new opt-in notification e-mail for assessors. This notification lets them know about any evidence on the **To Do** list that has been returned by either the learner or the IQA for further work. There is already one for new, unassessed evidence, so this is in addition to that one.



The screenshot shows the VQManager dashboard for user Edna Krabbappel (Assessor 6). The dashboard includes a navigation bar with icons for Home, My learners, Assessment tools, and Reports. Below this is a row of icons for various functions: To do (278), Info (34), Dashboard, Learner progress summary, Calendar, My activity log, Personal details, My VQManager network, and Messages (5). A modal window titled "E-mail options" is open, displaying four notification settings, each with a dropdown menu currently set to "None". The second option, "Receive e-mail reminder of evidence returned by other users", is highlighted with a red rectangular border.

E-mail options

Receive e-mail reminder for unassessed evidence
None ▾

Receive e-mail reminder of evidence returned by other users
None ▾

Receive e-mail reminder for missed assessment plan target dates
None ▾

Receive e-mail reminder for missed progress review planned dates
None ▾

It has the same options as the other reminders in this category.

None ▾
None
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Daily

The email is very similar to the other opt in options and would look like this:

Dear VQManager assessor,

You have evidence item(s) returned to you on the To-do tab of your Home page which require your attention.

Please log in to VQManager (www.vqmanager.co.uk) to assess this evidence.

Note that there may also be other evidence or tasks in various stages of progress which also require processing on your To do tab.

To stop receiving this email, please change your preferences on the Personal details tab once you have logged in to VQManager.

Kind regards

*Evidence 458/E/247 "evidence summary description text" submitted on 15/02/2010 by builder, tom
Evidence 18678/E/987 "evidence summary description text" submitted on 16/06/2017 by Becket, Thomas*

Please note that this is a notification email only and any replies to this email address will not be answered. If you have a query regarding this email or any aspect of VQManager, please contact your Centre Administrator directly.

New 'Learner activity' report

We have added a new **Learner activity** report, along the same lines as the Assessor activity and Line manager activity reports. It is located in **Reports** then **User Activity**. It shows the following actions in the system over a chosen period of time.

- Adding, editing and deleting Learner Activity Log entries
- Adding, editing and deleting Diary entries
- Progress review confirmation
- Assessment plan confirmation
- Unit sign off confirmation
- Qual sign off confirmation
- Editing and completion of Progression Tracker evaluations
- Editing and completion of Learning content / questions (including MCQ scores in the notes)
- Logging and editing evidence

VQManager

Welcome Edna Krabbappel (Assessor 6) [Change user/Logout](#) [Help and training](#)

Home My learners Assessment tools Reports

Learner contact details Progress Qualification tracker Progression tracker User activity Dormancy Report builder

☐ Users who logged in
☐ Learner unit progress
☐ Learner evidence
☐ Learner activity log entries
☒ Learner activity
☐ Employer activity

Learners:

Start date (inc):

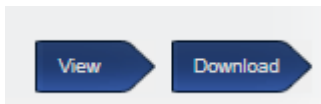
End date (inc):

Learner activity report (27/02/2023, ABC, ABC (761))

Please note:
Actions related to deleted items may display incomplete data in the report.

Date	Time	Qualification	Activity
30/03/2022	16:04:28		Reflective account: New log added (976)
30/03/2022	16:04:55		Learner activity log: New log added (977)
31/03/2022	12:31:27		Reflective account: Reflective account edited by student (978)
31/03/2022	12:38:37		Reflective account: New log added (980)
31/03/2022	12:38:55		Learner activity log: New log added (981)
14/04/2022			Assessment plan: Confirmed (1383)
14/04/2022		Customer Services NVQ - L2 (1)	Assessment plan: Confirmed (1381)
14/04/2022	18:53:20		Reflective account: New log added (984)
19/05/2022	12:43:36	Customer Services NVQ - L2 (1)	Evidence: Student submitted to Workplace training supervisor (761/E/1458)
19/05/2022	12:46:38	Customer Services NVQ - L2 (1)	Evidence: Student submitted to Workplace training supervisor (761/E/1459)
19/05/2022	12:57:26	Customer Services NVQ - L2 (1)	Evidence: Student submitted to Workplace training supervisor (761/E/1460)
19/05/2022	13:06:36		Reflective account: New log added (986)

It has the usual 'view' and 'download' options.



To avoid confusion, we have renamed the existing report that used to be called 'Learner activity' to 'Learner unit progress'. There are no changes to that report other than the name.

Allow assessor to delete evidence in certain states from To Do list


Assessors are now able to delete evidence directly from the **To Do** list, *where it hasn't already been assessed*.

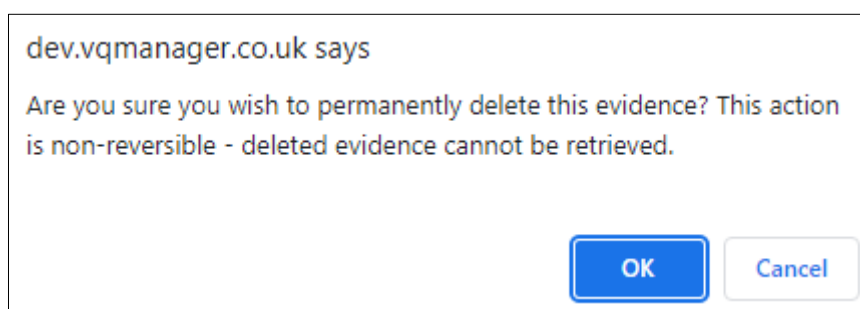
This new function applies to assessors only, and only to evidence in the **Unassessed evidence** and **Unsubmitted evidence** tables on the **To do** tab.

The screenshot shows the VQManager interface. At the top, there's a header with the VQManager logo, a welcome message for Edna Krabbappel (Assessor 6), and navigation links like 'Home', 'My learners', 'Assessment tools', and 'Reports'. Below this is a 'To do' tab with a list of tasks. The 'Unassessed evidence' table has columns: Learner, Date received, Evidence number, Qualification, and a rightmost column with delete icons. The 'Unsubmitted evidence' table has columns: Learner, Date saved, Evidence number, Qualification, and a rightmost column with delete icons. Red boxes highlight the delete icons in the rightmost column of each table.

Learner	Date received	Evidence number	Qualification	
Welford, James(872)	16/09/2021	872/E/1413	Customer Services NVQ - L2 9	Countersign
Welford, James(872)	13/04/2017	872/E/1022	No qualification / criteria selected	Assess
King, Dan(1550)	09/09/2016	1550/E/979	Key Skills 6	Assess
Flanders, Rod(7)	08/06/2007	7/E/82	Customer Services NVQ - L2 1	Assess

Learner	Date saved	Evidence number	Qualification	
Wolfson, Graham(330)	16/11/2010	330/E/238	BTEC in Hairdressing (Test) 1, 2	Edit
Welford, James(872)	05/01/2011	872/E/249	Customer Services NVQ - L2 6	Edit
Smith, Annette(706)	28/10/2010	706/E/224	BTEC in Hairdressing (Test) 2	Edit
Smith, Annette(706)	02/11/2010	706/E/234	BTEC in Hairdressing (Test) 1	Edit
Mann, Christopher John(713)	28/10/2010	713/E/227	BTEC in Hairdressing (Test) 2	Edit

The usual pop-up warning appears when you select the delete icon each time.  Please be very careful when doing this as deletions are non-reversible; deleted evidence cannot be retrieved.



Progress reviews - 'Request learner to confirm' auto selected

When creating or editing **Progress reviews**, the tick box to request learner confirmation will be automatically ticked, provided these users haven't already confirmed the review. Assessors can still de-select this option before saving if it is not required.

The screenshot shows the VQManager interface for adding a new progress review. At the top, the 'My learners' tab is selected, and a learner dropdown menu shows 'ABC, ABC (761)'. Below this is a toolbar with icons for various functions, including 'Progress reviews'. The main form area is titled 'Add new progress review' and contains several sections:

- Summary**: A text input field for the summary.
- Planned date**: A date input field set to '27/02/2023' and a dropdown menu for 'Set planned date to' followed by 'weeks from today'.
- Actual date**: A date input field set to '27/02/2023' and a checkbox labeled 'Review to be completed in future'.
- Must include:** A list of required items: Discussion overview, Action plan, ES Comments, Any ES/trainee concerns, and OTJ Check.
- Notes**: A text area with a maximum word count of 1000 words, accompanied by a rich text editor toolbar.
- Learner confirmation**: A section containing a checkbox labeled 'Request learner to confirm?', which is checked and highlighted with a red box.
- Employer confirmation**: A section containing a checkbox labeled 'Request employer to confirm?', which is also checked.

This auto-select function will also be applied to the line manager/employer request box, where the learner has a line manager/employer assigned.

Add a mouse-over in the To Do list to show evidence Summary description

We have added a function whereby users can now view the **Summary description** of evidence from the **To Do** list, so they can see the title of the piece of evidence without having to open it.



The user would hover over the evidence number and the title (summary description) of that piece of evidence appears.

The screenshot shows a table titled 'Unsubmitted evidence'. The table has columns for Learner, Date saved, Evidence number, Qualification, and Edit. A mouse-over tooltip is visible over the 'Evidence number' column, displaying the summary description: 'Identify additional services or products that are available'.

Learner	Date saved	Evidence number	Qualification	Edit
ABC, ABC(761)	27/02/2023	761/E/1295	Customer Services NVQ - L2 10	Edit
Gillett, Graham(38)	14/04/2021	38/E/1273	No qualification / criteria selected	Edit

The **Summary description** field displayed is located here on the **Log new evidence** tab.

The screenshot shows the 'Log new evidence' tab. It features a 'Methods' section with checkboxes for various evidence types: Work products, Witness testimony, Written questions, Simulation / storyboard, Professional discussion, Direct observation, Oral questions, Candidate feedback statement, Accredited prior learning, and Diary entry. Below this is a text input field labeled 'Summary description (max. 80 characters)' which is highlighted with a red border.

Unit assignments | Assessment plans | **Log new evidence** | Evidence list | Reflective account | Learning content | Progress reviews | Unit status, evidence matrix&signoff | Qualification status&signoff | Learner activity log | Learner details | Search evidence

Evidence

Methods

- ☐ Work products
- ☐ Witness testimony
- ☐ Written questions
- ☐ Simulation / storyboard
- ☐ Professional discussion
- ☐ Direct observation
- ☐ Oral questions
- ☐ Candidate feedback statement
- ☐ Accredited prior learning
- ☐ Diary entry

Summary description (max. 80 characters)

Top Tip

If the learner has more than one assessor/teacher, a great idea would be to ask the learner to include the initials of the assessor within the title of the evidence. Using this new function, the assessors/teachers can hover over the evidence number and see the summary description and also their own initials to see instantly who has perhaps set the work or who is the most appropriate person to assess/mark that piece of work. An assessment plan reference number could also be quoted for ease.


Add a 'sort' arrow to the 'status' column in the Assessment plan list

We have added a 'sort' arrow to the assessment plan table in the **Status** (signed off / not signed off). This is available for all users with this table.

▼ Customer Services NVQ - L2 (1)

[Sign off multiple assessment plans](#)

click to toggle sorting up or down on this column

Units and performance criteria covered	Date assigned	Target date	Description	Status	
1.1 A, B	25/06/2015	22/06/2015	ALPS [740]	 	View Edit Remove
5.1 A, B, C, D; 2, , , ; 1.2 A, B, C, D, E, F, G; 1.1 A, , , B, C, D, E, F; 5.2 A, B, C, D	06/01/2023	17/07/2023	Testing file deletion [1419]	 	View Edit Remove
12.1 A, B, C, D, E, F, G; 12.2 A, B, C, D, E	14/04/2022	31/08/2022	Unit 12 [1381]	 	View Edit Remove
1.2 B; 1.1 A, C; 15.2 G	19/12/2013	23/12/2013	vqmcan Test Assesmant Plan 1 [658]	 	View Edit Remove
5.1 A, B, C, D	18/02/2016	29/02/2016	Wii_2015_03_06 Test AP 1 [754]	 	View Edit Remove

Showing which units are mandatory in Unit assignment tab

We have added a column to the **Unit assignments** tables to show which units are mandatory, according to the rules of combination.

VQManager

Welcome Edna Krabbappel (Assessor 6) [Change user/Logout](#) [Help and training](#)

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

Learner: [Bangisa, Janice \(712\)](#)

[Unit assignments](#) [Assessment plans](#) [Log new evidence](#) [Evidence list](#) [Reflective account](#) [Learning content](#) [Progress reviews](#) [Unit status, evidence matrix&signoff](#) [Qualification status&signoff](#) [Learner activity log](#) [Learner details](#) [Search evidence](#)

▼ **Customer Services NVQ - L2 (1)**
[Learner target dates: 01/01/2008 to 01/02/2017]

Unit number	Unit title	Mandatory?	Target date	Credit value	Select all / Deselect all
1	Prepare yourself to deliver good customer service (1)	Yes	<input type="text"/>	3	<input checked="" type="checkbox"/>
5	Provide customer service within the rules (2)	Yes	<input type="text"/>	2	<input checked="" type="checkbox"/>
6	Recognise and deal with customer queries, requests and problems (15)		<input type="text"/>	5	<input type="checkbox"/>
9	Give customers a positive impression of yourself and your organisation (3)		<input type="text"/>	2	<input type="checkbox"/>
10	Promote additional services or products to customers (4)		<input type="text"/>	5	<input type="checkbox"/>
11	Process customer service information (5)		<input type="text"/>	5	<input type="checkbox"/>

Note: This is different to the default units. Mandatory units are those required in order to pass, according to the official rules of combination for the qualification. Clients can set up their own lists of default units for their learners, which may include a mixture of mandatory and optional units. Information on the default units function is here: <https://skillwise.net/wp-content/uploads/2019/08/Org-Admin-adding-default-units-to-qualifications.pdf>

Allow content e-mailed into the system to be added to existing evidence

You are now able to e-mail evidence into the system and add it to an existing evidence item. Evidence will only appear as an option if the evidence is with the user in question for editing at the time.

▼ **Emails awaiting further processing**

Date received	Subject	Attachments	Process email info...	Delete
28/03/2014	Wil test 2014_03_28 A		Select	Process
28/03/2014	Wil test 2014_03_28 B		Select	Process
28/03/2014	Wil test 2014_03_28 C		New evidence	Process
28/03/2014	Wil test 2014_03_28 D		Existing evidence (add to)	Process
28/03/2014	Wil test 2014_03_28 E		New learner activity log	Process
28/03/2014	Wil test 2014_03_28 F		New assessor activity log	Process
28/03/2014	Wil test 2014_03_28 G		New progress review	Process
28/03/2014	Wil test 2014_03_28 H		Existing progress review (add to)	Process
28/03/2014	Wil test 2014_03_28 F		New Reflective account	Process
28/03/2014	Wil test 2014_03_28 G		Select	Process
28/03/2014	Wil test 2014_03_28 H		Select	Process
12/02/2015	Test message		Select	Process
12/02/2015	Test 2015_02_12 B		Select	Process

Select **Existing evidence (add to)** from the **Process email into** options and then select **Process**.

From here it will allow you to select **Learner**:

The screenshot shows the VQManager interface. At the top, there is a navigation bar with icons for 'To do' (279), 'Info' (34), 'Dashboard', 'Learner progress summary', 'Calendar', 'My activity log', 'Personal details', 'My VQManager network', and 'Messages' (5). Below the navigation bar, there is a form with two dropdown menus. The first dropdown menu is labeled 'Learner' and has a red box around it. The second dropdown menu is labeled 'Evidence' and shows 'No existing evidence'.

Learner

ABC, ABC (761)

Evidence

Select

Select

13/05/2021 : Identify additional services or products that are available (761/E/1295)

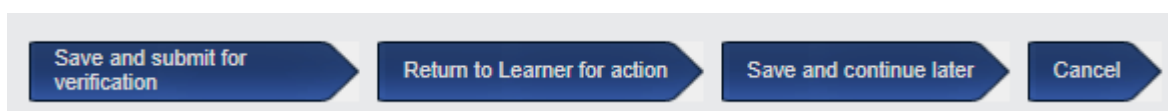
07/07/2021 : Questions (761/E/1376)

- Description
- Any attachments

The system will add a note at the top of the added content, to show where it's come from.

VQManager Enhancement -March 23

Save using the normal save options:



Here are the details of the full emailing in functionality: <https://skillwise.net/wp-content/uploads/2019/08/Assessor-emailing-into-the-e-portfolio-V2.pdf>

Add centre switch to choose where OTJ are recorded.

We have two areas for recording OTJT hours, the **Diary** tab and the **Activity log** tab. Some users have found this confusing, so we have added a centre switch with different options.

The options within the switch are:

- Log OTJ in **Diary** only
- Log OTJ in **Activity log** only
- Log OTJ in both **Diary** and **Activity log**

The default setting remains the third option, that hours can be added to both areas, since that is what we have now.

For either of the first two switches, the **Diary** or **Activity log** tabs would still be available to use but for the tab not selected, the area for logging OTJ would be hidden for all users.

For backwards compatibility, you will still see the OTJ column in the summary table, where there are entries there. Where there are no entries, it will hidden along with the section to log OTJ hours.

Here are the details of the full OTJ Training Functionality: <https://skillwise.net/wp-content/uploads/2022/12/Off-the-job-training-V2.pdf>

If you would prefer to only allow OTJ to be added on one tab or the other, please let us know along with your preference.

Updating notification e-mails with custom centre text

To help users, and make the notifications clearer to them, we have added the custom naming conventions to them. Some of the customisable names are:

User roles (learner, assessor, IQA, EQA, OSU, Expert witness, Line Manager)
Off the job training
Assessment plan
Verification

So now, any email notifications which go out, will reflect the naming conventions in your centre.

All enhancements (unless specified) have been automatically added to VQManager for you.