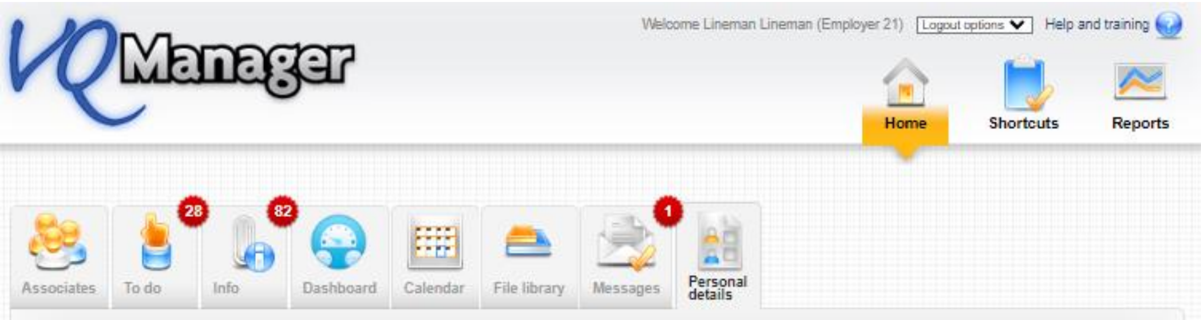
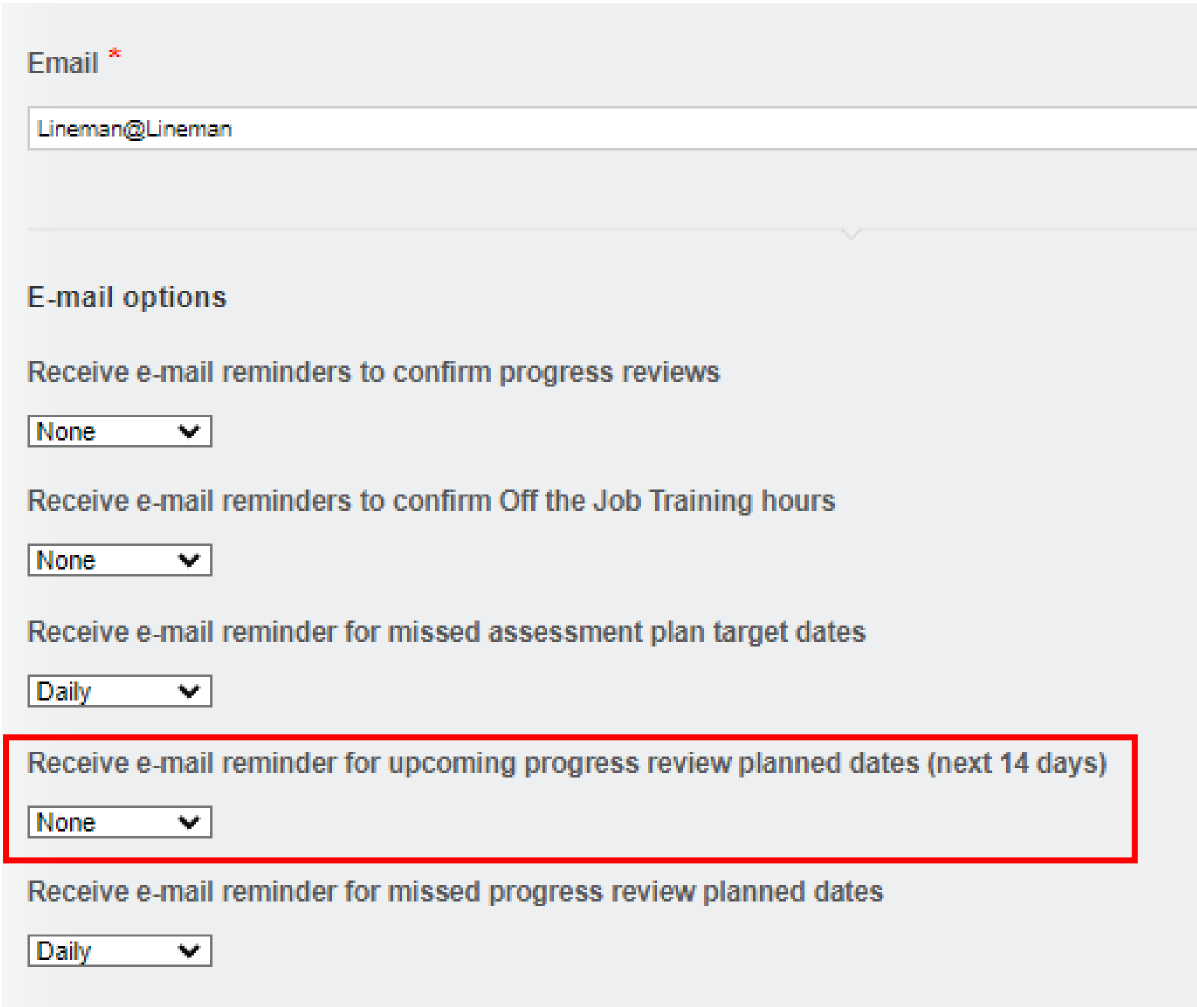
VQManager Enhancements March 2023

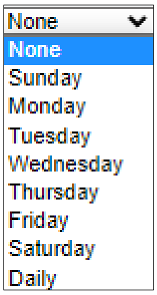
<u>Adding opt-in e-mail notification for line managers of upcoming progress reviews</u>

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.





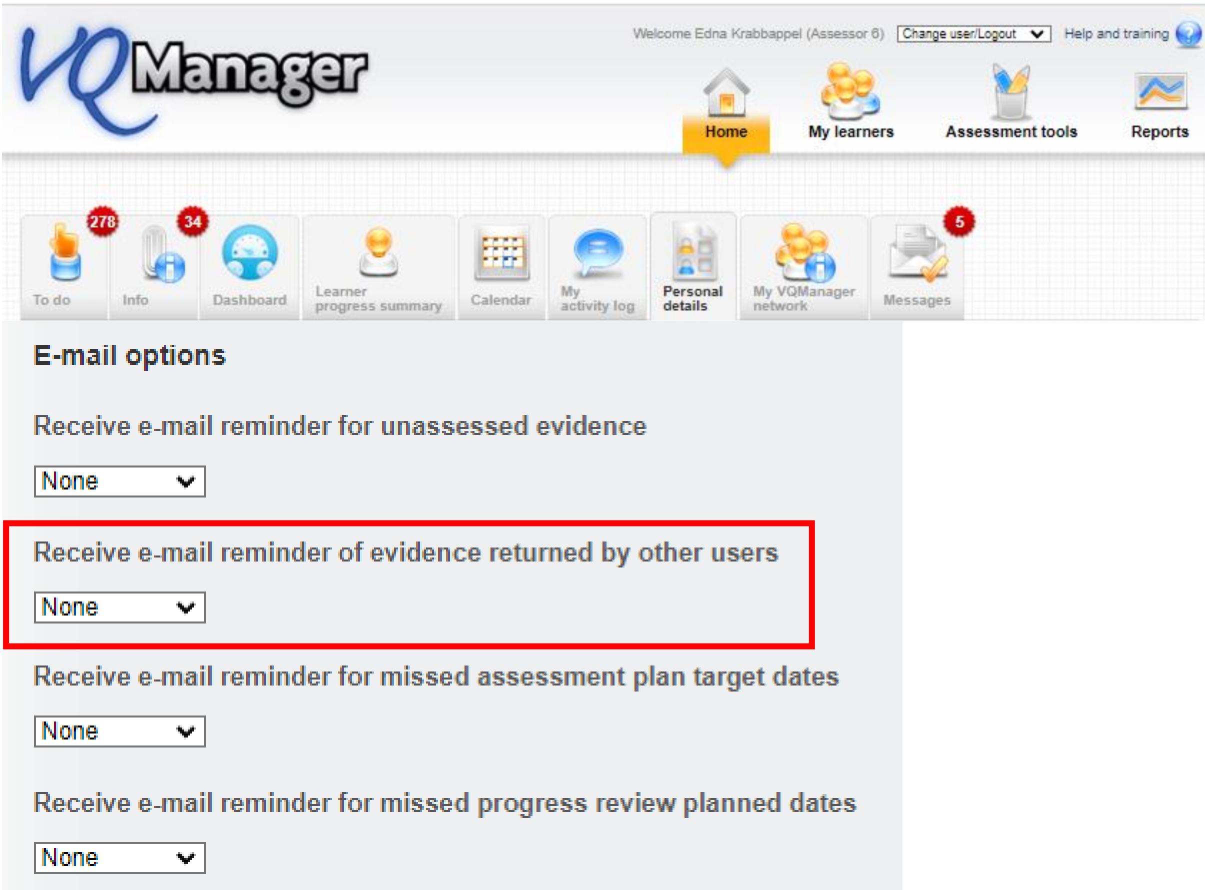
It has the same options as the other reminders in this category.



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

<u>Adding an opt-in notification for assessors of evidence returned</u>

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.



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

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

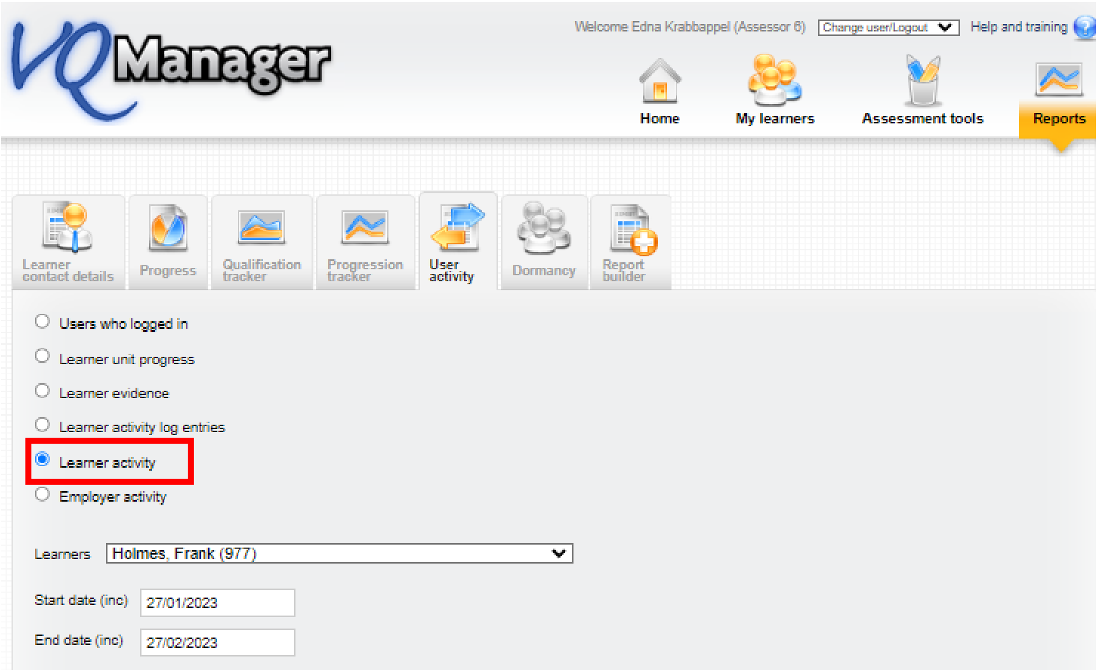
Evidence 458/E/247 "evidence summary description text" submitted on 15/02/2010 by builder, tom
Evidence 18678/E/987 "evidence summary description text" submitted on 16/06/2017 by Becket, Thomas

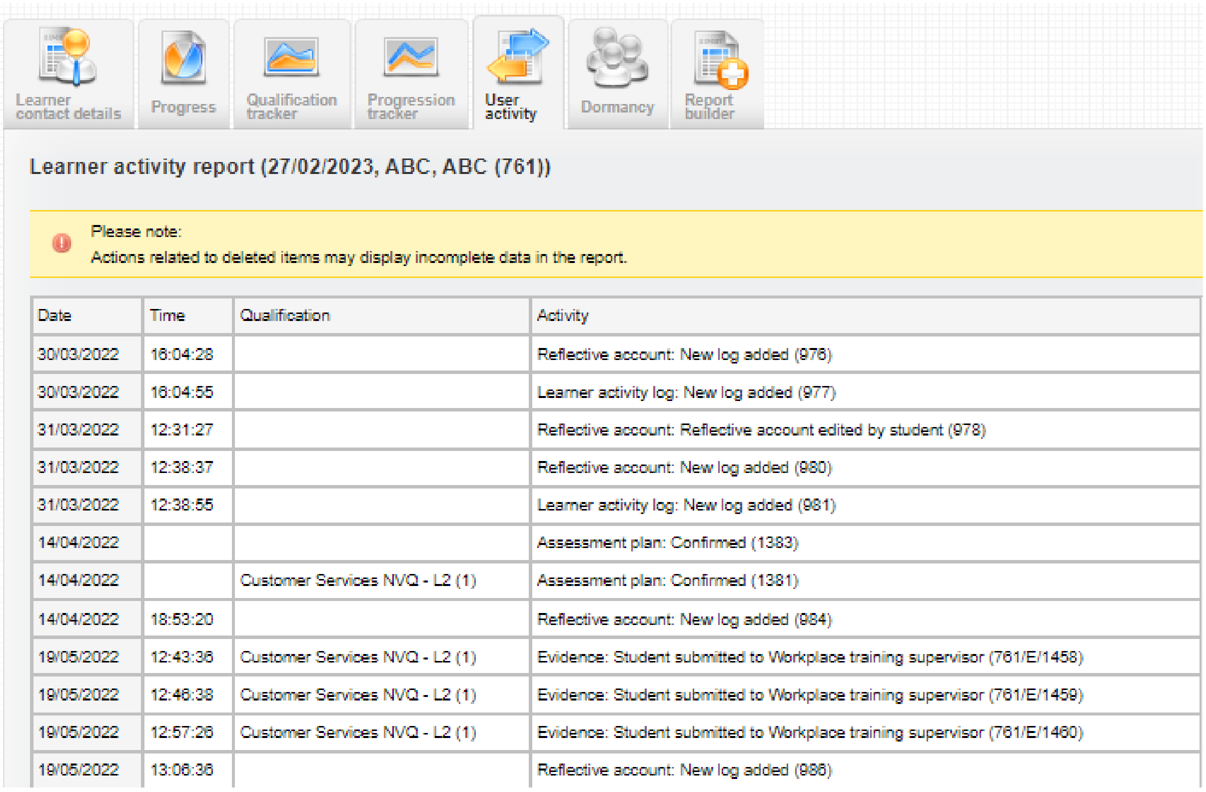
Please note that this is a notification email only and any replies to this email address will not be answered. If you have a query regarding this email or any aspect of VQManager, please contact your Centre Administrator directly.

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





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)

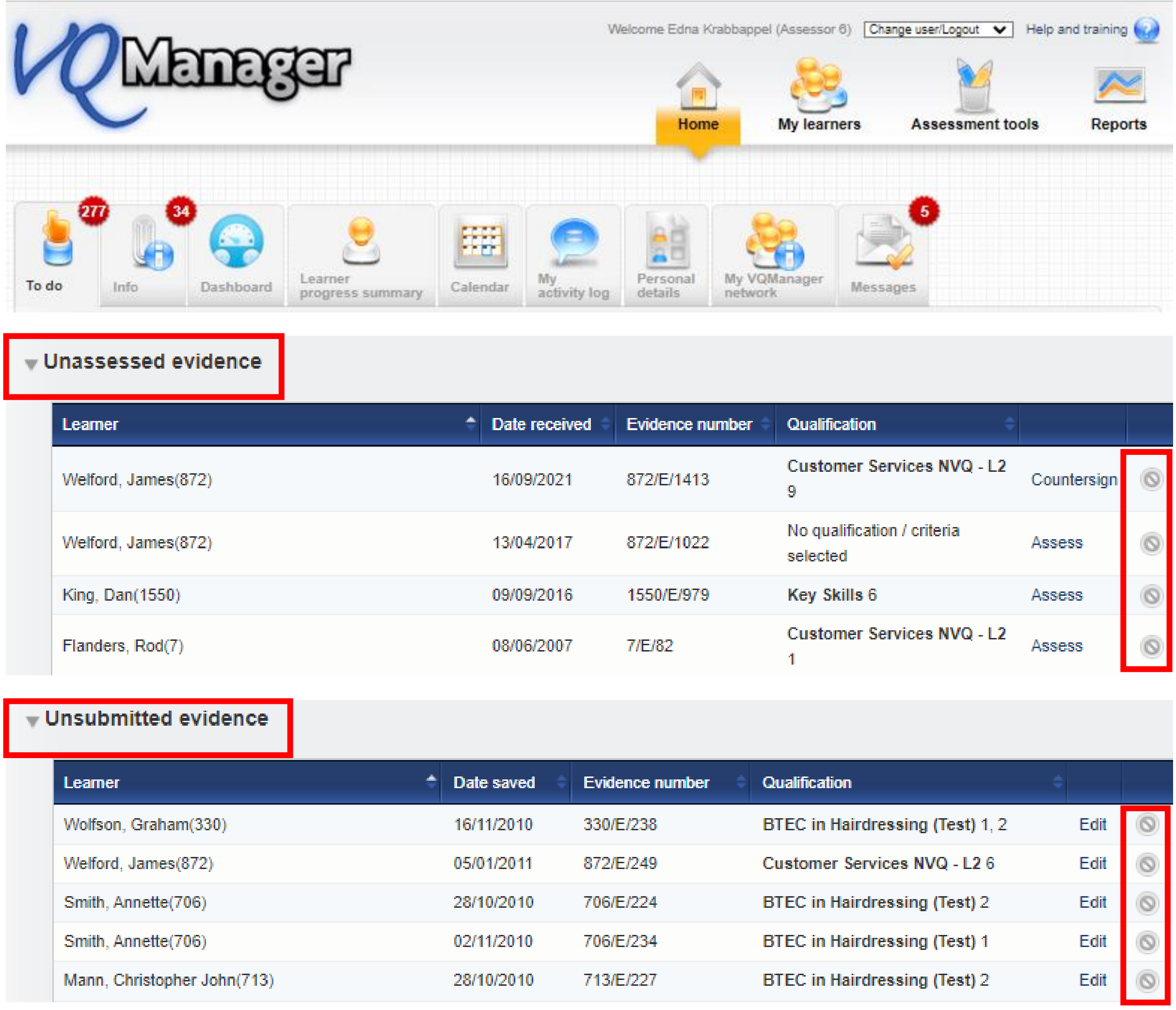
It has the usual 'view' and 'download' options.

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.

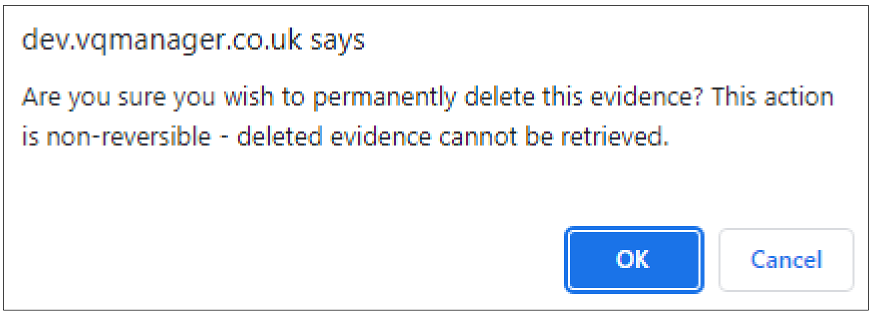
Allow assessor to delete evidence in certain states from To Do list

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.

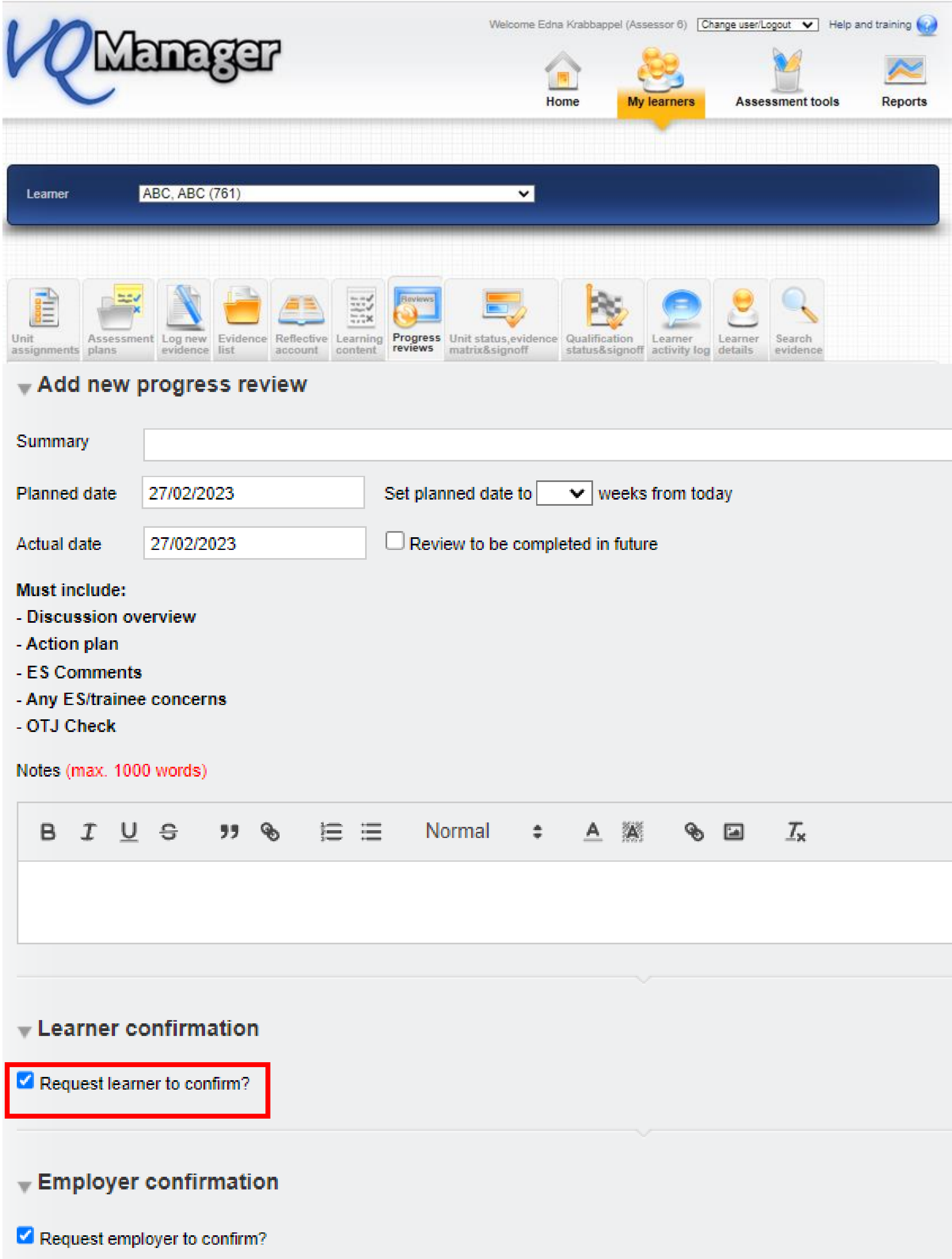


The usual pop-up warning appears when you select the delete icon each time. Please be very careful when doing this as deletions are non-reversible; deleted evidence cannot be retrieved.



Progress reviews - 'Request learner to confirm' auto selected

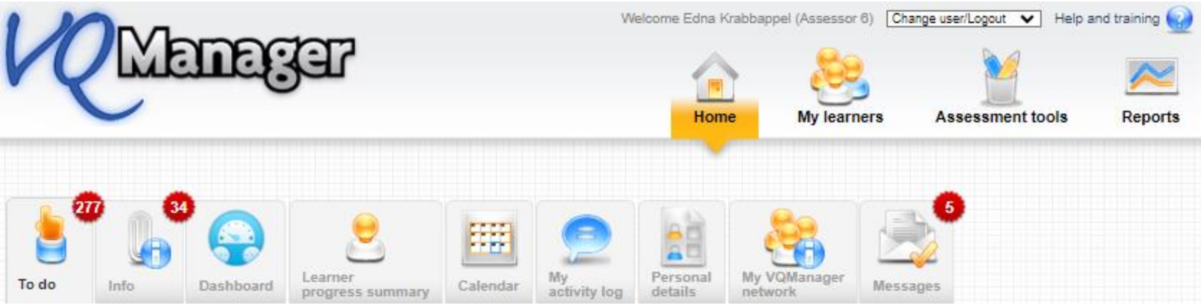
When creating or editing **Progress reviews**, the tick box to request learner confirmation will be automatically ticked, provided these users haven't already confirmed the review. Assessors can still de-select this option before saving if it is not required.

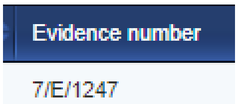


This auto-select function will also be applied to the line manager/employer request box, where the learner has a line manager/employer assigned.

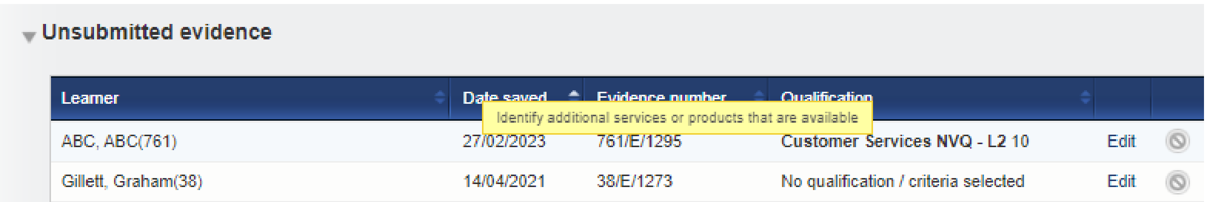
Add a mouse-over in the To Do list to show evidence Summary description

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.



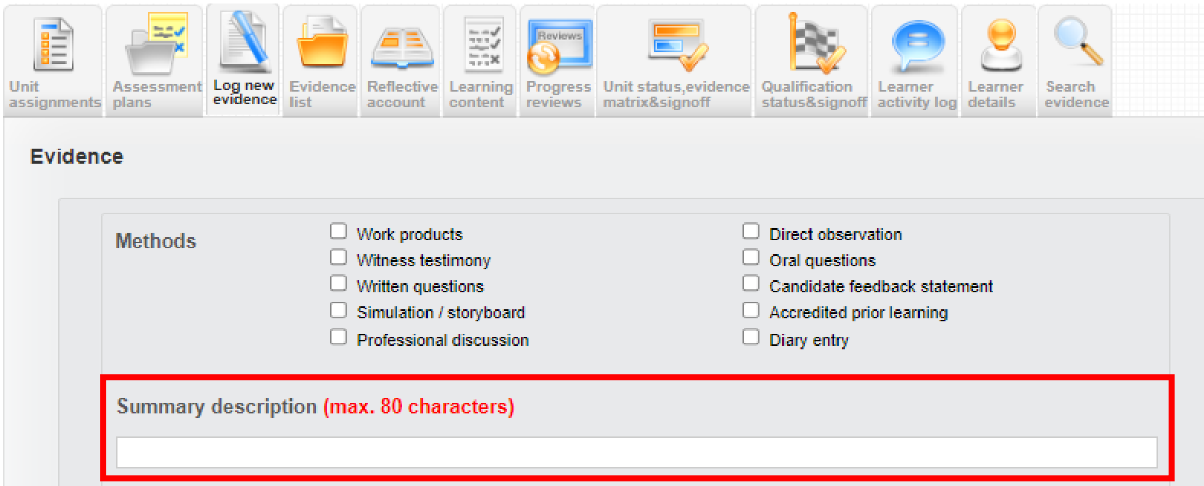


The user would hover over the evidence number and the title (summary description) of that piece of evidence appears.



Learner	Date saved	Evidence number	Qualification		
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.



Top Tip

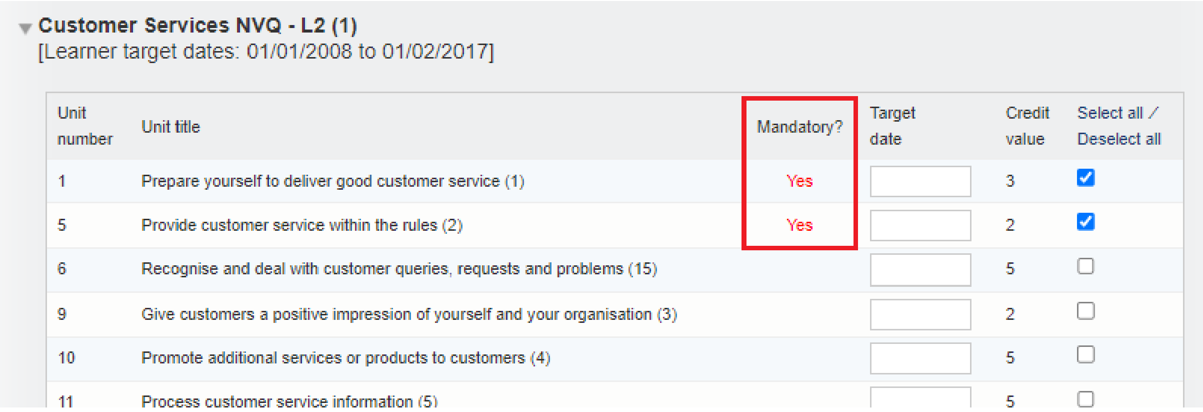
If the learner has more than one assessor/teacher, a great idea would be to ask the learner to include the initials of the assessor within the title of the evidence. Using this new function, the assessors/teachers can hover over the evidence number and see the summary description and also their own initials 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.

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.



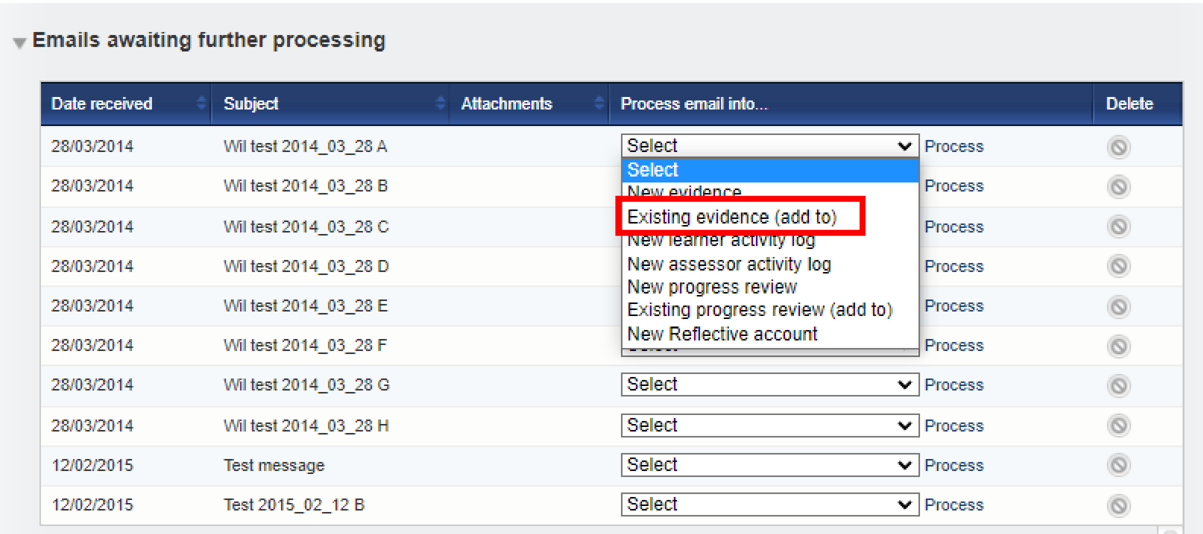
Customer Services NVQ - L2 (1)
[Learner target dates: 01/01/2008 to 01/02/2017]

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

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*](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.

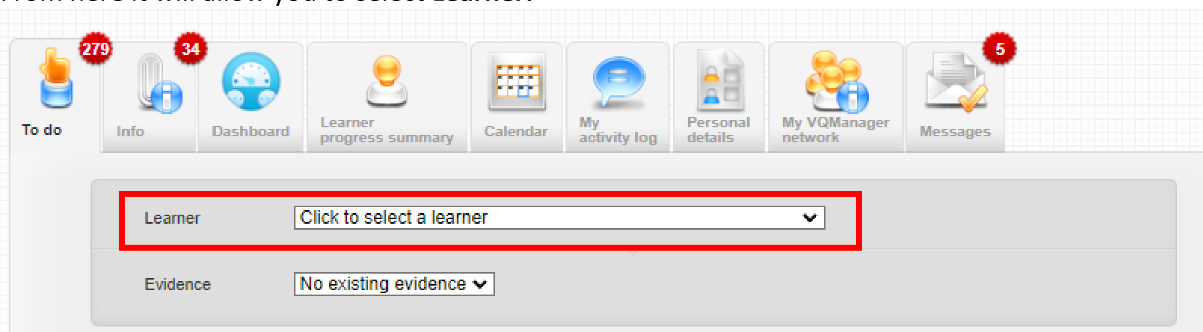


Emails awaiting further processing

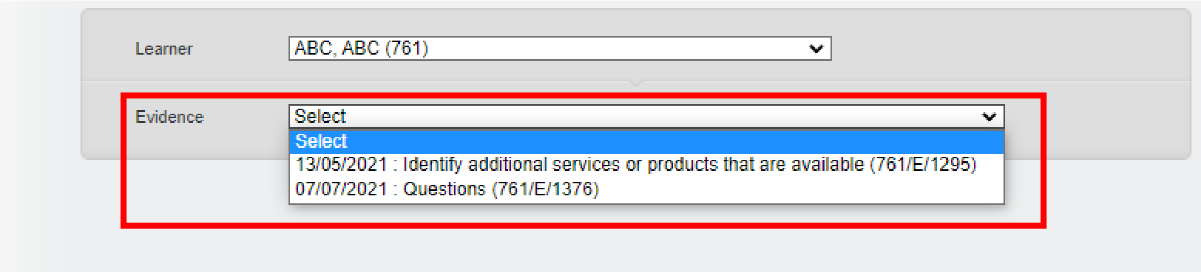
Date received	Subject	Attachments	Process email into...		Delete
28/03/2014	Wil test 2014_03_28 A		Select	Process	
28/03/2014	Wil test 2014_03_28 B			Process	
28/03/2014	Wil test 2014_03_28 C			Process	
28/03/2014	Wil test 2014_03_28 D			Process	
28/03/2014	Wil test 2014_03_28 E			Process	
28/03/2014	Wil test 2014_03_28 F			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:**

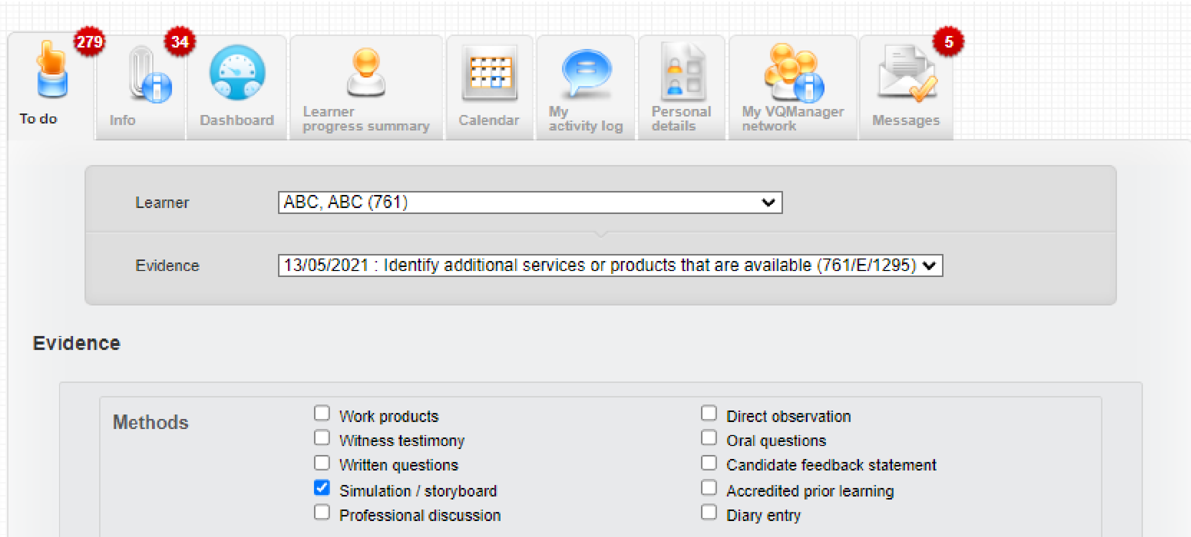


Then **Evidence:** only evidence available to be edited will be shown here.

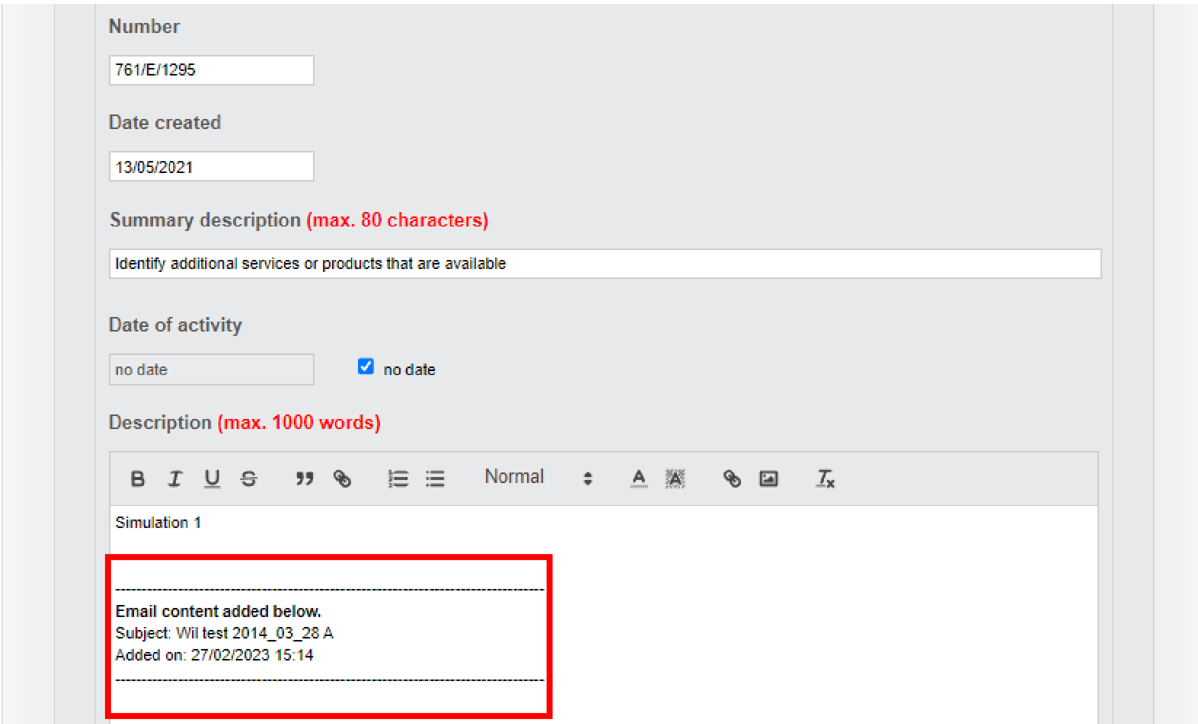


Select the evidence and the page will refresh, dropping all elements of the email into the existing version –

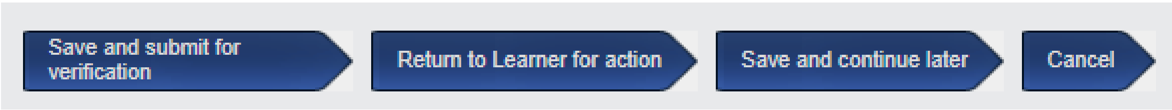
- Description
- Any attachments



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



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.