

## Progress Reviews

Progress reviews can be set up by the Centre Admin or by the assessor in three ways in the e-portfolio:

1. Centre Admin pre-sets a sequence of reviews
2. Ad hoc reviews can be added by assessors
3. Assessors can pre-set a review for the future

### Centre Admin can pre-set reviews

Centre Admin can set up Progress Reviews which appear on their own tab for the learner. In the learner's user profile, the Centre Admin adds a start and end date for the learner and enters a recurrence pattern (e.g. 4 weeks)

The screenshot shows a configuration form for 'Progress reviews'. It has the following fields:

- Enable progress reviews:** A checkbox that is checked.
- Start date:** A text input field containing '17/12/2020'.
- End date:** A text input field containing '31/12/2021'.
- Recurrence pattern (weeks):** A dropdown menu with 'None' selected. The dropdown is open, showing a list of options: 'None', '1', '2', '3', and '4'. The '4' option is highlighted in blue.

The form is titled 'Progress reviews' and is part of a section labeled 'Off the job training - Worki...'.

This will then automatically create Progress Reviews recurring between the learner's start and end date according to the pattern selected. For example, if a 4-week recurrence pattern is chosen, the first review will be 4 weeks after the learner's start date, and there will be another review planned every 4 weeks until the learner's end date. Assessors will be reminded of these progress reviews on their To Do tab, and the reminders will be removed when the assessor enters an 'actual' date against the planned review.

If a Centre Admin has set up a set of Progress Reviews for a learner and these needed altering, i.e. the reviews need to re-scheduled, in the learner's profile, there is a tick box to instigate this.

### How do I delete pre-planned Progress Reviews added incorrectly?

In the learner's profile, there is a tick box, 'Start a new series of progress reviews'.

**Progress reviews**

Enable progress reviews

Start a new series of progress reviews  (5 non-completed progress reviews will be removed)

Start date

End date

Recurrence pattern (weeks)

When this is selected, the date and recurrence pattern fields clear, and allow new dates to be put in.

**Progress reviews**

Enable progress reviews

Start a new series of progress reviews  (5 non-completed progress reviews will be removed)

Start date

End date

Recurrence pattern (weeks)

The Centre Admin should add the new dates and recurrence pattern, and click 'save' at the bottom of the page. When this is done, the new Progress reviews will be created in the learner's account.

Any un-completed Progress reviews from the previous set will be deleted, where un-completed means no actual date was selected, and/or no text has been added in the Notes section. The number of reviews that will be removed is stated in the learner's profile.

Start a new series of progress reviews  (5 non-completed progress reviews will be removed)

Progress reviews created on an ad-hoc basis by the assessor, even ones scheduled for the future, are not affected.

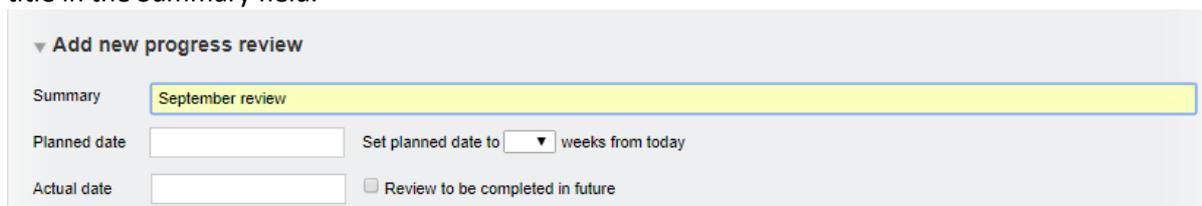
### Ad hoc reviews can be added by assessors

Assessor can add a progress review at any time by using the “Add new progress review” area.

### Assessors can pre-set reviews

An Assessor can also create a pre-set Progress Reviews using the “Add new progress review area” again but adding a planned date for some time in the future. This will trigger the usual notifications in the ‘upcoming Progress Review’ area of the To Do tab.

To set up a review like this, scroll down to the “Add new progress review” area and give the review a title in the Summary field.



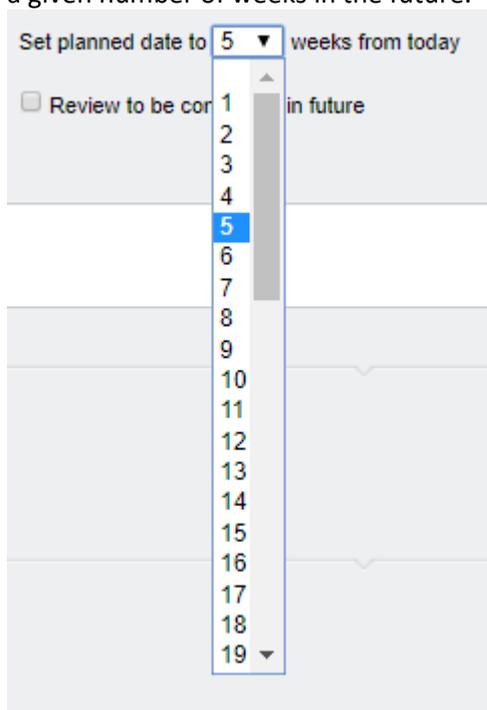
▼ Add new progress review

Summary

Planned date  Set planned date to

Actual date   Review to be completed in future

The planned date can be set in one of two ways. Clicking on the Planned date field will bring up the calendar for the Assessor to select a date. Alternatively, you can use the drop down to select a date a given number of weeks in the future.



Set planned date to 5 weeks from today

Review to be completed in future

1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19

On selecting the desired number of weeks from today, the calendar automatically opens with the Monday of the chosen week selected. The Assessor can select another day if they wish at this point.

Planned date  Set planned date to  weeks from today

Actual date

Notes

◀ Sep 2017 ▶

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Click on the 'Review to be completed in the future' checkbox, add any relevant comments in the Notes field, and click 'save' at the bottom of the page.

On the day of the review, open the review and enter the Actual date, any notes and upload documents as normal. You are still able to tick the confirmation request for the learner and Line Manager. Don't forget to click 'save' at the bottom.

At this stage, we have added a comments box for the Learner and the Line Manager, so both are able to make comments as well as ticking the confirmation box. Note that confirmation can only be requested if the Actual date of the review is completed. This prevents users from confirming a review that hasn't happened yet.

Assessor view before confirmation:

▼ **Learner confirmation**

Request learner to confirm?

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▼ **Line manager confirmation**

Request line manager to confirm?

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

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Learner view:

▼ **Learner confirmation**

I hereby confirm that I agree to the above

Learner comments

▼ Progress reviews (Gillett, Graham)

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
16/05/2017	18/05/2017	16/05/2017	progress review	Krabbappel, Edna			Edit
28/06/2017	28/06/2017	28/06/2017	progress review 3	Krabbappel, Edna			Edit
29/06/2017	29/06/2017	29/06/2017	progress review 3	Krabbappel, Edna			Edit
22/08/2017	22/08/2017	22/08/2017	August review	Krabbappel, Edna			Edit

Completed reviews show the target completion to date and also current qualification progress in the Progress Review. The date the review was saved by the Assessor appears on the screen along with the percentage completion for each qualification on that particular date. You will need to save the review with an Actual date and then re-open it to see this.

You will notice that the off the job training hours also pull through to this area.

▼ Progress review (Gillett, Graham)

Summary

May PR

Planned date

25/05/2023

Actual date

25/05/2023

Progress as on 25/05/2023

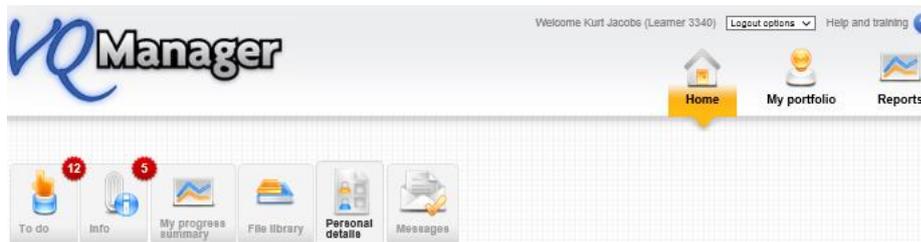
BTEC in Hairdressing (Test)	Score: 360	Calculated grade: D*
Housing Benefits NVQ	Target completion to date: 78	Current completion: 100
Learning content and MCQs (DEMO)	Target completion to date: 100	Current completion: 0
Local Tax SVQ - L3	Target completion to date: 100	Current completion: 100
Money Management MCQ (DEMO)	Target completion to date: 100	Current completion: 93
V1 Assessor SVQ	Target completion to date: 59	Current completion: 2

Off the Job Training as on 25/05/2023

Hours logged	29:45
Target hours to date	350:30
Total hours required	500:00

## Using the emailing in functionality with Progress Reviews

Assessors can use this function with Progress Reviews.



Remember that the email that is received by VQManager must be sent from the same email address that is recorded in your **personal details** tab.

Home telephone number  
011 643 4978

Mobile telephone number  
07841 231138

Email \*  
kurt@skillwise.net

Save Cancel

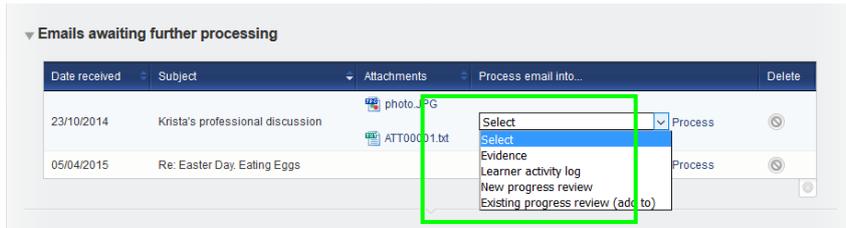
Emails must be sent to the following email address: [portfolio@vqmanager.co.uk](mailto:portfolio@vqmanager.co.uk)

The information is then *either* (depending on the settings for the centre, please speak with your assessor if you are unsure):

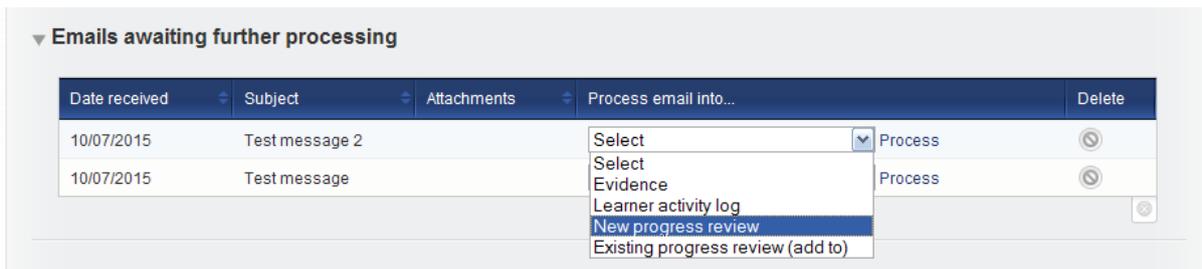
1. Placed on the **To do** tab of the assessor in a section called **Evidence emailed from learners**. Your assessor will process this email for you.
2. Placed on the **To do** tab of the learner in a section called **Emails awaiting further processing**. The email will appear as below:

Date received	Subject	Attachments	Process email into...	Delete
20/06/2012	Evidence from my daily work	Craig assembling goods for dispatch.doc	Select Process	
20/06/2012	Direct observation of Kurt	photo.JPG ATT11905.txt	Select Process	

Click on the **Process mail into** and select either **Evidence Learner Activity Log New Progress Review** or **Existing progress Review (add to)** to proceed.



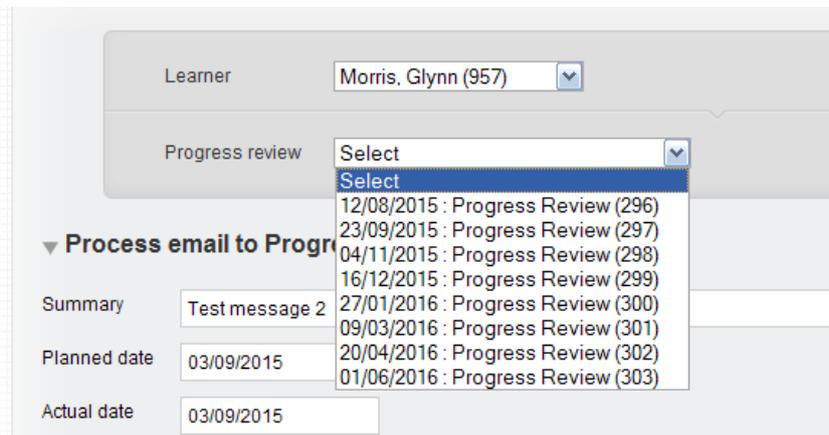
**Process in “New progress review”**



If you select ‘New Progress Review’, a new page opens for you to select the learner and complete the Progress Review. Complete the form and click ‘save’ at the bottom.

**Process in “Existing Progress Review”**

If you select ‘Existing Progress Review’, the page asks you to select the learner and the review you want to add to. Complete the form in the same way and click ‘save’ at the bottom.



**Note added to Progress Review tab to remind users what to write**

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 (or add any other text you think is needed). 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.

▼ Add new progress review

Summary

Planned date  Set planned date to  weeks from today

Actual date   Review to be completed in future

**Must include:**

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

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.

Notes (max. 1000 words)

**B I U S " " ☒ ☒** Normal **A** **Ix**

**Must include:**

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

28/1000 words

Once saved, the text box disappears:

▼ Progress review (Welford, James)

Summary

Planned date

Actual date

Progress as on 08/02/2021

Customer Services NVQ - L2	36%
Management NVQ - L3	15%

Off the job training as on 08/02/2021

Hours logged	5:00
Target hours to date	1484:00
Total hours required	1484:00

Notes (max. 1000 words)

**B I U S " " ☒ ☒** Normal **A** **Ix**

**Must include:**

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

[This development is available upon request. Please contact us to have your text inserted into the Progress review area.](#)

▼ **Add new progress review**

Summary

Planned date  Set planned date to  weeks from today

Actual date   Review to be completed in future

**Must include:**

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

Notes (max. 1000 words)

**B I U S " ↻ ☰ ☷ Normal ↕ A [X] 🔗 📎 T<sub>x</sub>**

▼ **Learner confirmation**

Request learner to confirm?

▼ **Employer confirmation**

Request employer to confirm?

**Progress reviews - 'Request learner to confirm' auto selected**

We have set up a centre switch which can be selected to automatically tick the 'request learner to confirm' box when creating a new **Progress review** and when editing an existing one, provided the learner hasn't already confirmed the review. Assessors can still de-select this option before saving if it is not required.


Welcome Edna Krabbappel (Assessor 6)  [Help and training](#)

Home
My learners
Assessment tools
Reports

Learner

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

▼ **Add new progress review**

Summary

Planned date  Set planned date to  weeks from today

Actual date   Review to be completed in future

**Must include:**

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

Notes (max. 1000 words)

**B I U S ” ↻ ☰ ☷ Normal ↕ A A ↻ 📎 T<sub>x</sub>**

▼ **Learner confirmation**

Request learner to confirm?

▼ **Employer confirmation**

Request employer to confirm?

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

**If you would like this setting up for either the learner or line manager/employer, or both, please let us know along with your preference.**

### **Add current progress to 'Add new progress review' pane**

On the **Progress review** tab, we have added an area which displays current progress so assessors can view this when they are completing a review (rather than just afterwards when a review is saved), since it may be relevant to what they might write. The information shows progress for all qualifications assigned to the learner as well as OTJ hours (if applicable).

It appears in the **Add new progress review** section and also on opening a pre-set review.

▼ Add new progress review

Summary

Planned date  Set planned date to  weeks from today

Actual date   Review to be completed in future

Progress as on 17/10/2023

BTEC in Hairdressing (Test)	Score: 360	Calculated grade: D*
Housing Benefits NVQ	Target completion to date: 84	Current completion: 100
Learning content and MCQs (DEMO)	Target completion to date: 100	Current completion: 0
Local Tax SVQ - L3	Target completion to date: 100	Current completion: 100
Money Management MCQ (DEMO)	Target completion to date: 100	Current completion: 93
V1 Assessor SVQ	Target completion to date: 65	Current completion: 2

Off the Job Training as on 17/10/2023

Hours logged	44:45
Target hours to date	374:30
Total hours required	500:00