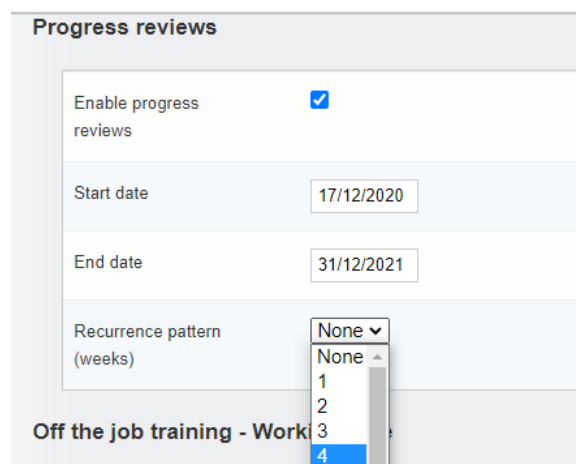# Progress Reviews

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)

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'.

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

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.

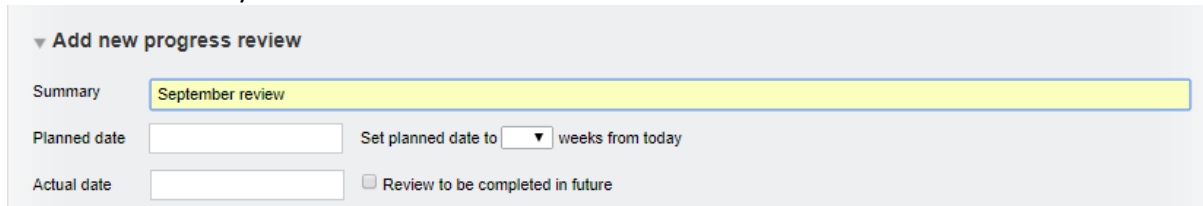Progress reviews created on an ad-hoc basis by the assessor, even ones scheduled for the future, are not affected.

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.
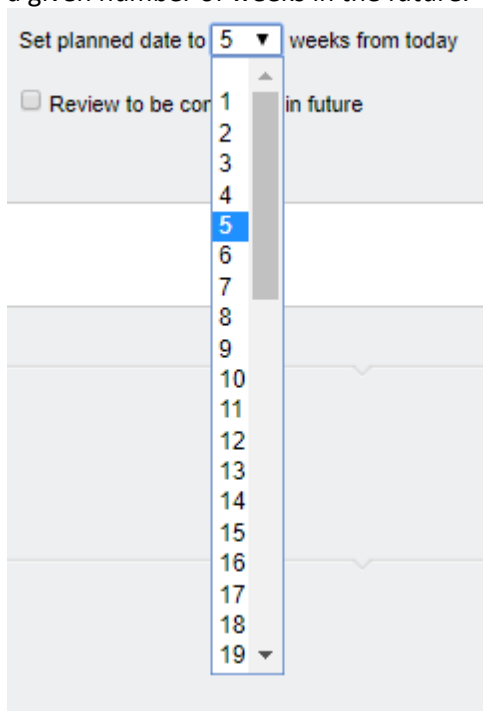
▾ Add new progress review			
Summary	September review		
Planned date		Set planned date to ▾ weeks from today	
Actual date		☐ Review to be completed in future	

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 cor | in future

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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.

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 view:

Progress reviews (Gillett, Graham)

Date logged	Date planned	Actual date	Summary	Logged by	Notes	Attach-ments	
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 us this function with Progress Reviews.
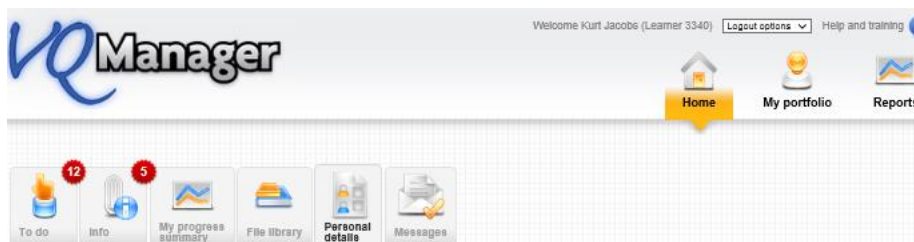
Remember that the email that is received by VQManager must be sent from the same email address that is recorded in your **personal details** tab.

Emails must be sent to the following email address: **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:
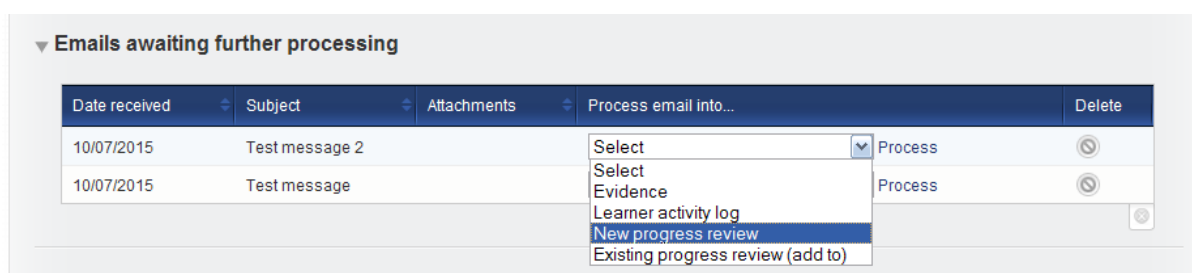

Click on the **Process mail into** and select either **Evidence Learner Activity Log New Progreess Review or Existing progress Review (add to)** to proceed.
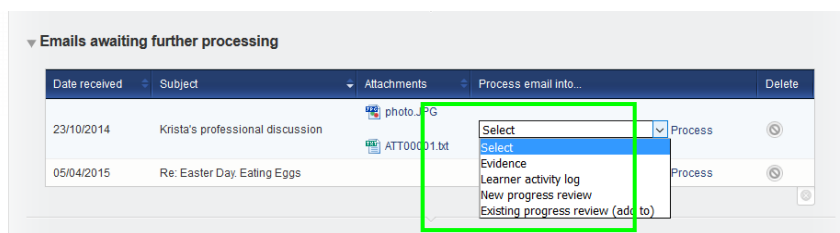
Process in **"New progress review"**

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.

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.

Once saved, the text box disappears:

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   27/02/2023   Set planned date to [▼] weeks from today

Actual date   27/02/2023   ☐ Review to be completed in future

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

Notes (max. 1000 words)

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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 hen 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.

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	17/10/2023
Actual date	17/10/2023

Set planned date to [▾] weeks from today

☐ 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

Allow Line Managers to upload files to Progress Reviews.

Previously line managers were only able to add comments to the progress reviews, they are now able to upload files too. The uploading of files works in the same way as it does for other users and areas of the system.

[alr120]

Progress review (Eusebio, Francis)

Summary	Review 2
Planned date	13/10/2023
Actual date	13/10/2023

Progress as on 13/10/2023

Certificate in Pharmacy Service Skills L2 (Edexcel) QCF 500_9351 (GW)	Target completion to date: 100	Current completion: 0
Certificate in Understanding the Safe Handling of Medicines L2 question bank	Target completion to date: 100	Current completion: 0
Hairdressing NVQ 2	Target completion to date: 100	Current completion: 0
Key Skills	Target completion to date: 100	Current completion: 0

Off the Job Training as on 13/10/2023

|	
Hours logged	0:00
Target hours to date	984:12
Total hours required	984:12

Employer confirmation

☐ I hereby confirm that I agree to the above

Employer comments

▸ Upload and attach files in support of this entry

Add rows to Progress Review report to show which users signed off.

It is now possible to see the name of the person who signed off a progress review in the progress review report.
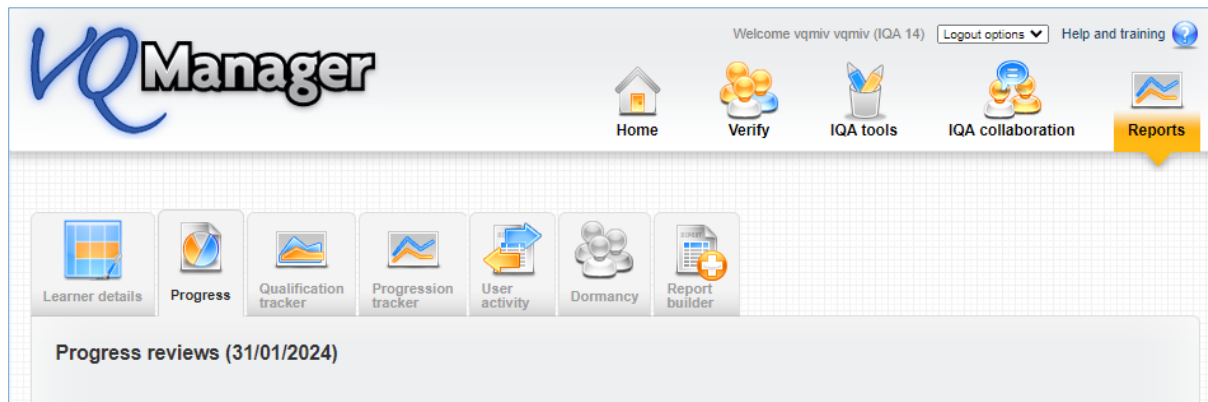
The name which appears is the name of the assessor who confirms the review in the "actual date" field.

	1	2
Planned	16/01/2017	12/06/2017
Actual	16/01/2017	15/06/2017
Assessor	Kari North	
Difference	0	3
Days since last		150
Learner confirmed		11/08/2017
Employer confirmed	19/01/2022	n/a
Employer	Bryson, Billy (1722)	n/a

The name of the line manager (employer) who also confirms the review is now visible - if this is applicable.

The new rows in this report appear in the on screen and downloadable versions as you would expect.