



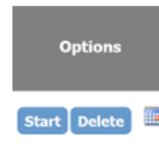
# Assessor Basics

Starting reviews



# Starting reviews

To start a scheduled review from the reviews page, click the Start button shown below the Options column.



Actual Review Date	Scheduled Review Date	Last Review Date	ALN	ASN
28/02/2014 <input type="button" value="Set today"/>	31/12/2013	<input type="text"/>	Not specifi	Not specifi
The <b>actual review date</b> defaults to the date that you click the <b>start</b> button.  <b>Set today</b> – This button will reset the date and re-calculate the progress.	This is the date you <b>scheduled</b> your review.	This field will display the date of the <b>previous review</b> . The field will be blank if this is your first review with the learner.	If the <b>Additional Learning/Support Needs</b> have been specified for a learner, they will appear as <b>yes</b> or <b>no</b> .	

## Progression between reviews

The unit progression between reviews section, will show the following columns.

Unit Progression between Reviews				
Unit (click to read)	Progress/ Grade at 11/02/2014	Progress/ Grade at 28/03/2014	Anticipated Completion Date	% increase since Last Review
[CU678] Work in a business environment (Level 2)	0%	0%	25/07/2014	--
[CU679] Communication in a business environment (Level 2)	0%	0%	25/07/2014	--
[CU680] Manage own performance in a business environment (Level 2)	0%	13%	25/07/2014	+13%
[CU681] Improve own performance in a business environment (Level 2)	0%	0%	25/07/2014	--
[CT184] Principles of Managing Information and Producing Documents	0%	0%	25/07/2014	--
<b>Overall</b>	<b>5%</b>	<b>5%</b>	<b>25/07/2014</b>	<b>--</b>

Your **overall** progress since the last review will be shown as a total % at the bottom of this table.

This column **will not** appear if this is your first review with the learner.

## Achievement between reviews

This section will show you any assessments and units that have been completed. There will be a references that you can click to view the assessment/unit.

Achievements between Reviews	
Assessments Completed	No assessments were completed
Units Signed Off	No units signed off

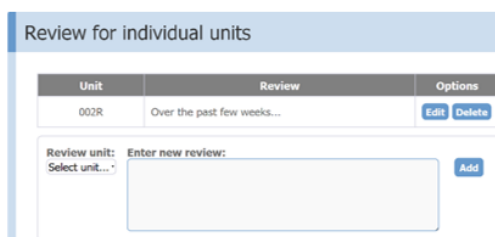
Achievements between Reviews	
Assessments Completed	[CS1] [PRJ1] [PRJ2] [RA1] [WP1] [WP2]
Units Signed Off	[001S] [002R] [003W] [CT183] [CT184] [CU678] [CU679] [CU680] [CU681]
Assessment	Support Method
PRJ1	Telephone Coaching <input checked="" type="checkbox"/>
WP1	<input type="checkbox"/>

# Continued...

## Review for individual units

1. Select the unit from the drop down list.
2. Enter your review into the text box.
3. Click the Add button.

You have the option to create reviews for individual units



Unit	Review	Options
002R	Over the past few weeks...	Edit Delete

Review unit: Enter new review:  
Select unit... Over the past few weeks... Add

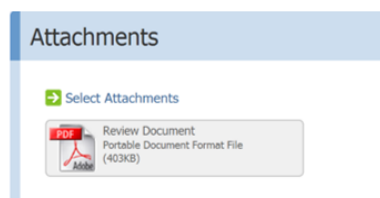
## Review for all units

Enter your review in the text box.  
These changes will save when you sign  
or save the review page.



## Attachments

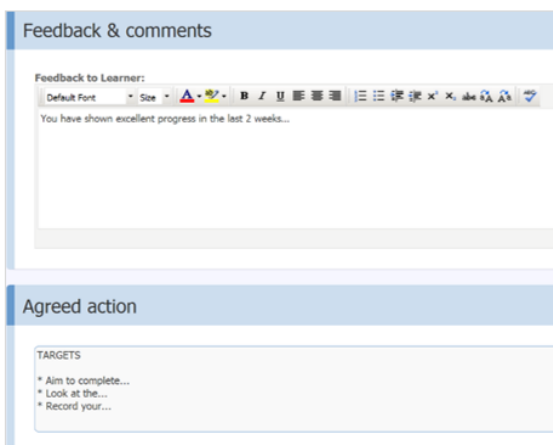
Any additional documents that you wish add to the review, can be uploaded here.



## Feedback & Agreed Action

These 2 sections can be used to split up general review feedback and any targets or activities the learner can do before their next review.

This section will be used to summarise the review and give the learner some feedback regarding their assessments, progress etc.



Feedback to Learner:

Default Font Size [font icons] [bold] [italic] [underline] [link] [unlink] [list] [ul] [undo] [redo] [clear] [help]

You have shown excellent progress in the last 2 weeks...

Agreed action

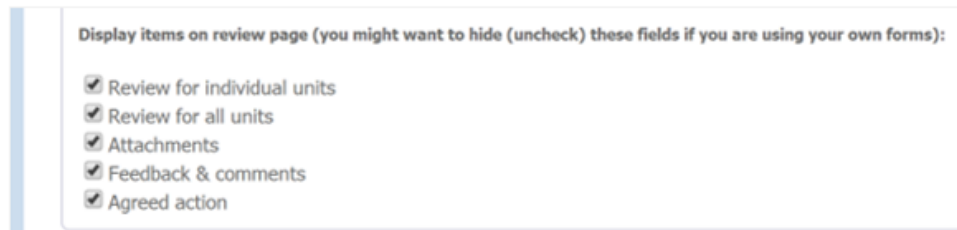
TARGETS

- \* Aim to complete...
- \* Look at the...
- \* Record your...

# Continued...

## Customising your Reviews

These sections of the review can be removed by a Centre Manager in the Centre Settings.

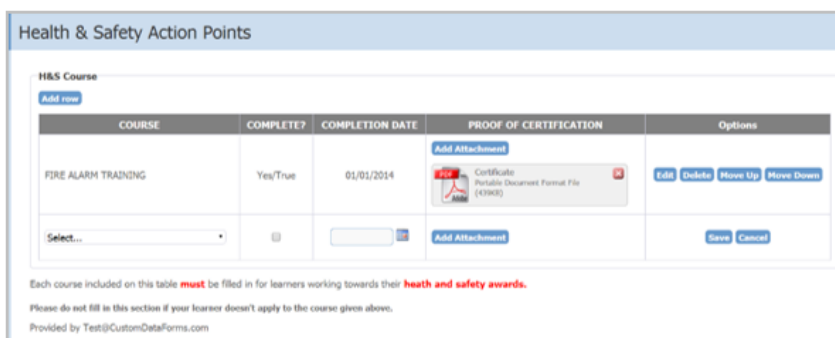


Display items on review page (you might want to hide (uncheck) these fields if you are using your own forms):

- Review for individual units
- Review for all units
- Attachments
- Feedback & comments
- Agreed action

## Using Custom Data Forms

Custom Data Forms can be included within reviews, if there is additional information that needs to be recorded.



Health & Safety Action Points

H&S Course  
Add new

COURSE	COMPLETE?	COMPLETION DATE	PROOF OF CERTIFICATION	Options
FIRE ALARM TRAINING	Yes/True	01/01/2014	<p>Add Attachment</p> <p>Certificate Portable Document Format File (10360)</p>	<p>Edit Delete Move Up Move Down</p>
Select...			<p>Add Attachment</p>	<p>Save Cancel</p>

Each course included on this table **must** be filled in for learners working towards their **health and safety awards**.  
Please do not fill in this section if your learner doesn't apply to the course given above.  
Provided by Test@CustomDataForms.com

Custom forms can be created to contain additional information which needs to be presented in reviews.

Only *Centre Managers* have the ability to create Forms and assign them to the learners.

A Form will only appear in a learner's Review when the following conditions are met:

- The publish option of the form is set to "Reviews" (Assessor/Learner/Employer)
- The Form is published.
- The Form is assigned to the learner at the point the review was started.

# Continued...

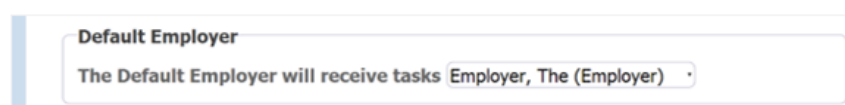
## Employer signatures

It is possible to configure your Centre so that the learner's Employer is required to sign the Review after the Learner.

- An Employer can only sign a review if the Employer user group is enabled in the Centre Settings.

Employer signature required (a Default Employer must be set for each learner)

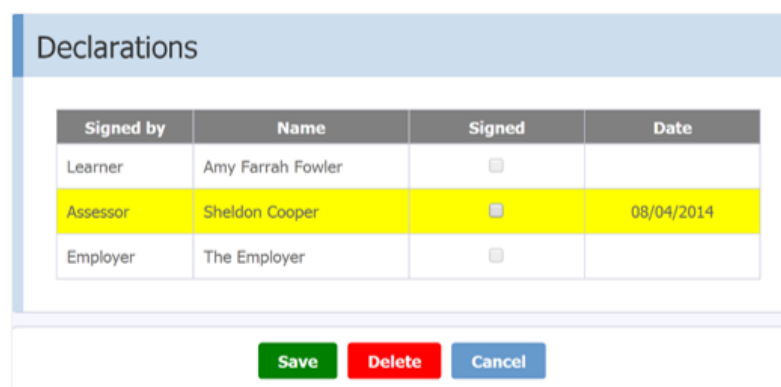
- The Employer must be set Default Employer on the learner's Access Accounts tab.



The screenshot shows a configuration field titled "Default Employer". Below the title, it says "The Default Employer will receive tasks" followed by a dropdown menu currently displaying "Employer, The (Employer)".

If you are a Centre Manager, or an Assessor that can manage learner's accounts, you can assign the default Employer by following the steps below.

1. Open the learner's portfolio.
  2. Click the Access Accounts tab at the top of the page.
- Select an Employer from the drop down list and Save at the bottom.



The screenshot shows a table titled "Declarations" with the following data:

Signed by	Name	Signed	Date
Learner	Amy Farrah Fowler	<input type="checkbox"/>	
Assessor	Sheldon Cooper	<input type="checkbox"/>	08/04/2014
Employer	The Employer	<input type="checkbox"/>	

Below the table are three buttons: "Save" (green), "Delete" (red), and "Cancel" (blue).

The Employer's signature section will appear at the bottom of the review, when the learner's account has been correctly configured.

To learn more see our full guides

<https://live.onefile.co.uk/userguides/>



[info.onefile.co.uk/onboarding](https://info.onefile.co.uk/onboarding)