



# Skills Portfolio

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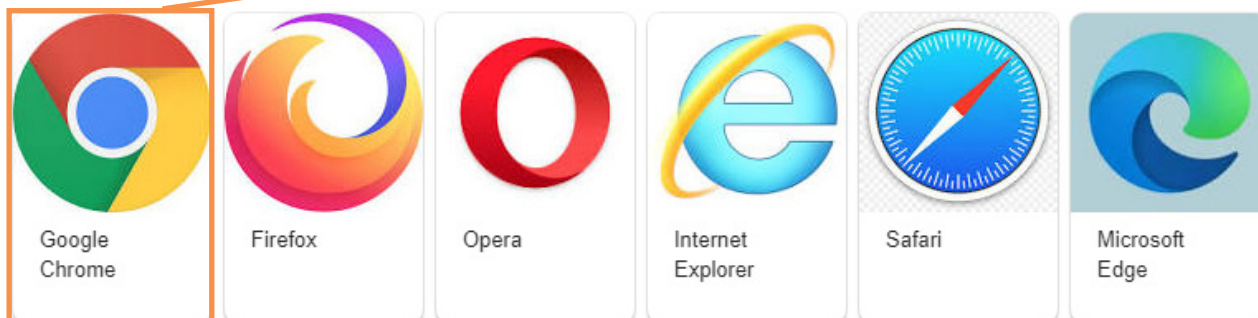
## User Guide

# Contents

<b>Logging into Skills Forward</b>	<b>Page 3</b>
<b>Add a Learner</b>	<b>Page 4</b>
<b>Creating an Assessor</b>	<b>Page 6</b>
<b>Create an Assessors Group of Learners</b>	<b>Page 8</b>
<b>Adding Learners to a Group</b>	<b>Page 10</b>
<b>Navigate to a Learner's Profile/Portfolio</b>	<b>Page 12</b>
<b>Assign a Qualification/Standard to a Learner</b>	<b>Page 14</b>
<b>View Caseload/Learners OJT Progression</b>	<b>Page 19</b>
<b>How to Assess/Mark Submitted Evidence</b>	<b>Page 21</b>
<b>Complete/View an ILP (Individual Learner Plan)</b>	<b>Page 26</b>
<b>How to Record a Visit</b>	<b>Page 27</b>
<b>How to View Visits</b>	<b>Page 30</b>
<b>How to Build an Assessment Plan</b>	<b>Page 32</b>
<b>Linking Templates to Assessment Plans</b>	<b>Page 37</b>
<b>Assign an Assessment Plan</b>	<b>Page 39</b>
<b>IQA Sampling Plan</b>	<b>Page 41</b>
<b>Assign User IQA Role/Permissions</b>	<b>Page 41</b>
<b>Create an IQA Plan</b>	<b>Page 43</b>
<b>Configure an IQA Sampling Plan</b>	<b>Page 45</b>
<b>Add Items to an EQA Plan</b>	<b>Page 47</b>
<b>Assign Verifiers to EQA Plans</b>	<b>Page 48</b>
<b>Assign Groups to EQA Plans</b>	<b>Page 49</b>
<b>Assign Qualifications to EQA Plans</b>	<b>Page 50</b>
<b>Showcase</b>	<b>Page 51</b>
<b>How to Delete Evidence</b>	<b>Page 54</b>
<b>How to Merge Evidence</b>	<b>Page 55</b>
<b>How to give an Employer Access to Learner Profiles</b>	<b>Page 56</b>
<b>Creating Employer Profile</b>	<b>Page 56</b>
<b>Create an Employers Group of Learners</b>	<b>Page 58</b>

# Logging into Skills Forward

1. Open your Web Browser (Preferably Chrome)



2. Enter the following address - [myskillsforward.co.uk](https://myskillsforward.co.uk)



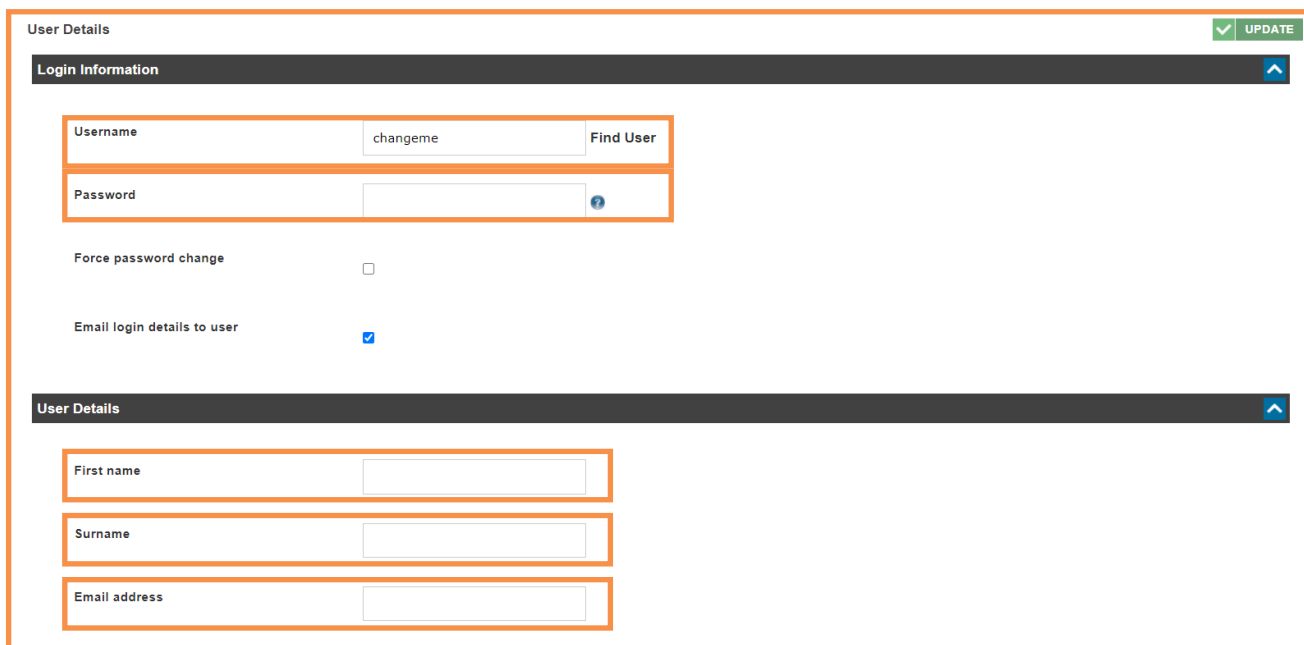
3. Enter your User name
4. Enter your Password
5. Select the Login button.

## How to add a learner

Having logged onto the platform you will arrive at the Dashboard which is your home page.

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon > Select **add a new user**.

Next complete the mandatory fields:



The screenshot shows a 'User Details' form with two sections: 'Login Information' and 'User Details'. In the 'Login Information' section, the 'Username' field contains 'changeme' and has a 'Find User' button next to it. The 'Password' field is empty. Below these are two checkboxes: 'Force password change' (unchecked) and 'Email login details to user' (checked). The 'User Details' section contains three empty text input fields for 'First name', 'Surname', and 'Email address'. A green 'UPDATE' button with a checkmark is visible in the top right corner of the form area.

**Username** – create a username for your learner, there are no rules it just needs to be bespoke as no two usernames can be the same.

**Password** – if you know what the learners password is going to be populate this field accordingly, in the event you do not, use the temporary password of changeme.

**First name** – specify the first name of your learner.

**Surname** – specify the surname of your learner.

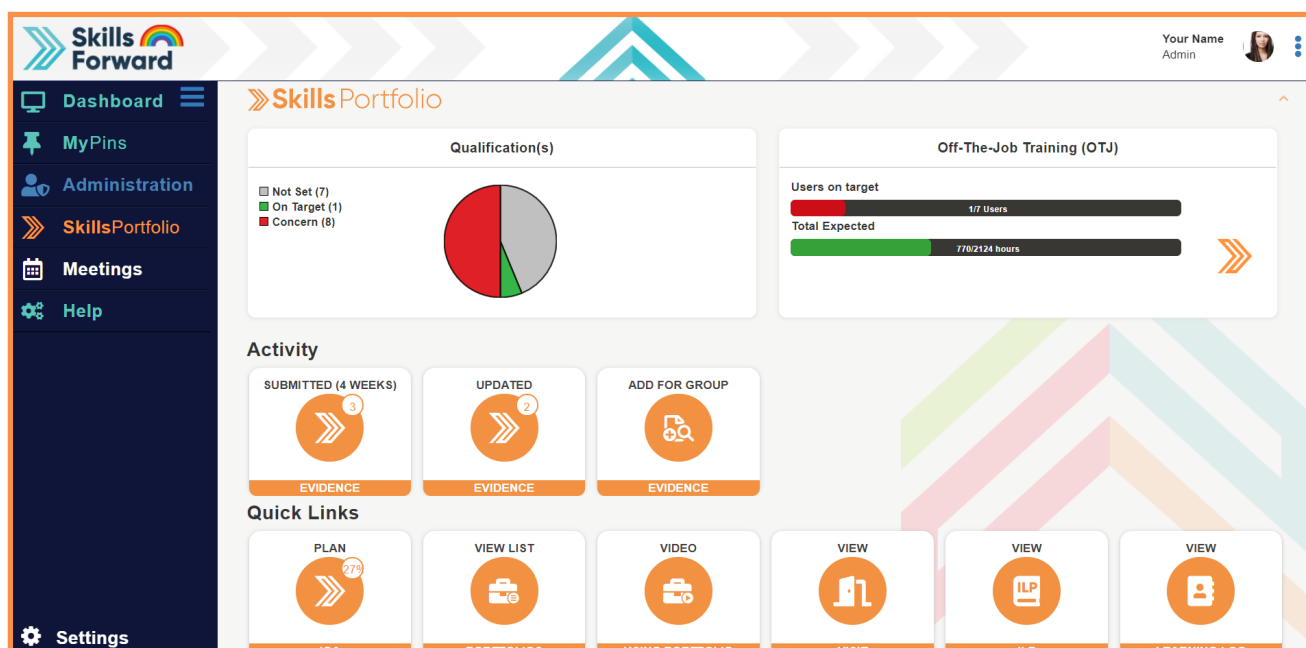
**Email address** – specify the email address of your learner if you have it.

Selecting the **Update** button to create the account we will send an automated email with log in instructions.

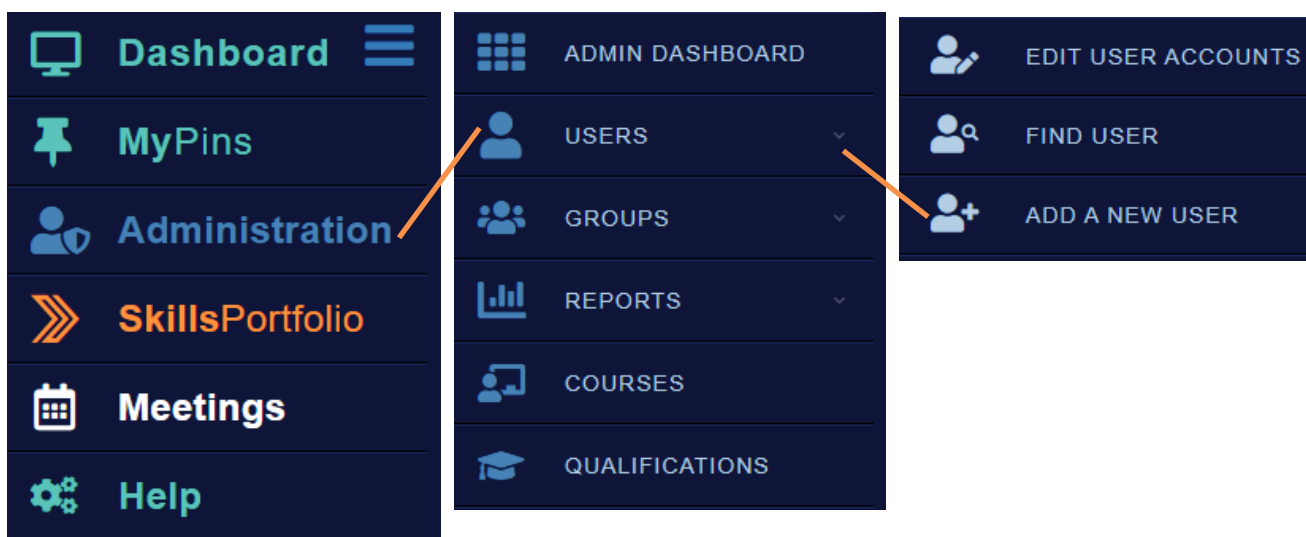
Select **Update** to finalise the creation of this account, all is left to do is assign a qualification.

# Creating an Assessor

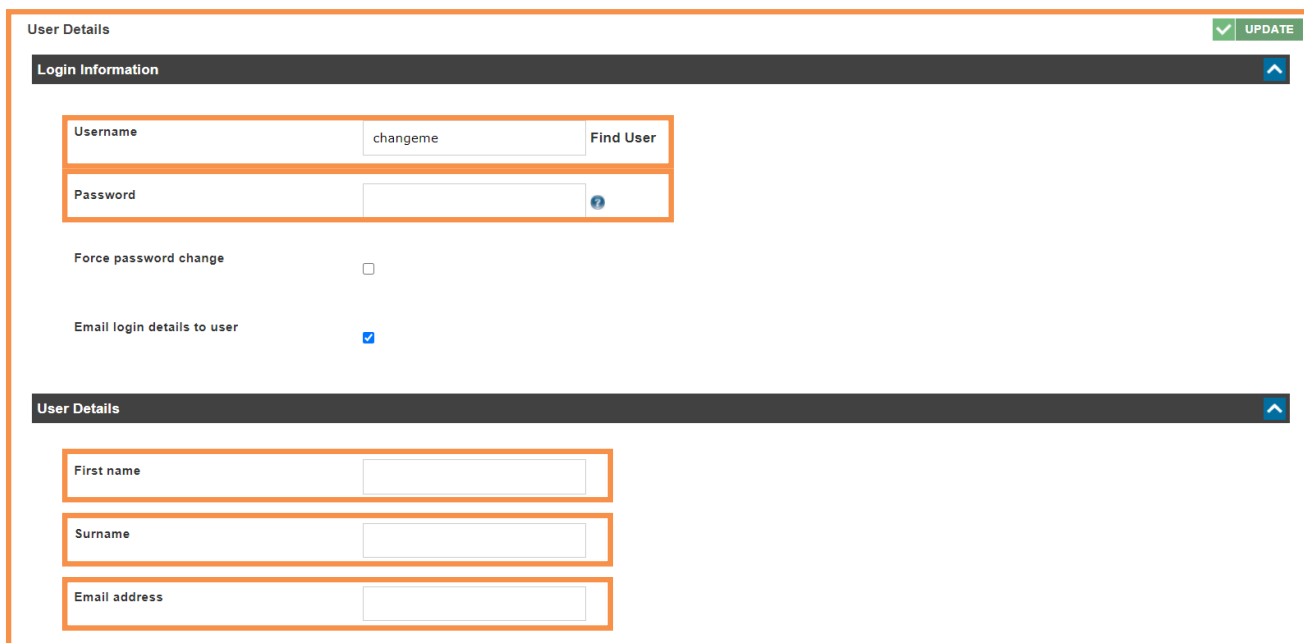
Having logged onto the platform you will arrive at the Dashboard which is your home page.



From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon > Select **add a new user**.



Next complete the mandatory fields:



The screenshot shows a 'User Details' form with two sections. The top section is 'Login Information' and the bottom is 'User Details'. In the 'Login Information' section, the 'Username' field contains 'changeme' and has a 'Find User' button next to it. The 'Password' field is empty. Below it are two checkboxes: 'Force password change' (unchecked) and 'Email login details to user' (checked). The 'User Details' section contains three empty text input fields for 'First name', 'Surname', and 'Email address'. A green 'UPDATE' button with a checkmark is visible in the top right corner of the form.

**Username** – create a username for your assessor, there are no rules it just needs to be bespoke as no two usernames can be the same.

**Password** – if you know what the assessors password is going to be populate this field accordingly, in the event you do not, use the temporary password of changeme.

**First name** – specify the first name of your assessor.

**Surname** – specify the surname of your assessor.

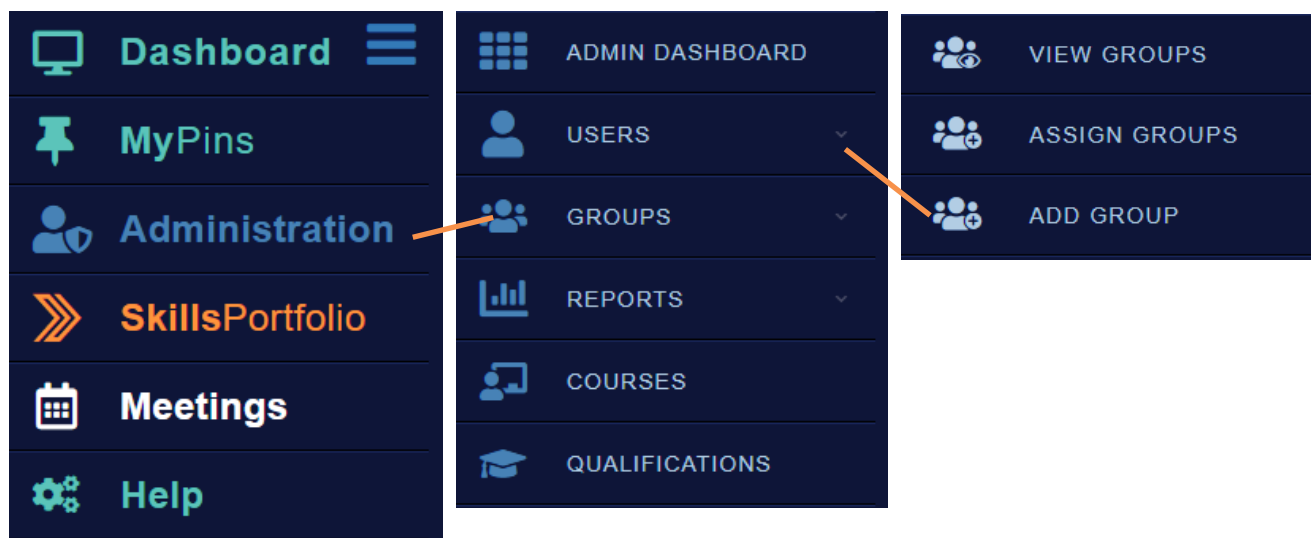
**Email address** – specify the email address of your assessor if you have it.

Selecting the **Update** button to create the account we will send an automated email with log in instructions.

Select **Update** to finalise the creation of this account, all is left to do is create a group of learners for this assessor to access.

# Process for the Creation of an Assessors Group of Learners

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **group's** icon > Select **Add group**.



Proceed to give the group a **title** and select **Update** to finalise the creation.

The screenshot shows the 'Add Group' form. At the top, there is a 'Show All' button and a 'Group Details' dropdown menu. Below this, the 'Group Details' section is visible. The form contains the following fields:

- Title:** A text input field with a red asterisk indicating it is required. Below the field, it says 'This is the title of the group.' An orange box highlights this field.
- Reference:** A text input field with the placeholder text 'Optional group reference.'
- Date Started:** A date picker field.
- Date Finished:** A date picker field.
- Parent:** A dropdown menu with the option 'Select Parent'. Below it, it says 'If required select the group that is the parent of this group.'
- Group Type:** A dropdown menu with the option 'Default'. Below it, it says 'Optionally select a group type.'
- Add Child Users:** A checkbox that is checked. Below it, it says 'Add any users in child groups to this group.'
- Auto Assign Group Courses:** An unchecked checkbox. Below it, it says 'Automatically assign courses linked to the Group to Tutors and Learners.'



## Select **Add Users**

**Testing**

Group
Edit Group
Edit Users
Group Notes

Group Files
Group Web Forms
Add Group To Web Form

Show All
Group Details
Sub Groups
Group Courses

Group Users

Group Details
COPY GROUP

Group Title: Testing
Group Type: Default

Sub Groups
+ ADD SUB GROUP

Group Courses
+ ADD COURSES

Group Users
+ ADD USERS

## Select the **Assessor/s** you would like for this group. Select **Forward**

SELECTED 3 / 19 (MAX 1000)
SHOWING 1-19 / 19
SELECT ALL
STAGE 1 / 2

FIRST NAME

Admin, Amber	Assessor, Trainee	Foley, Callum	IQA, Trainee	Learner, Abi	Learner, Demo	Learner, Fiona	Learner, Francis	Learner, Georgia
Learner, Harriet	Learner, Joanne	Learner, Kiki	Learner, Richard	Learner, Test	Manager, Mandy	SF051020, SF0510...	sf210920, sf210920	Tutor, Tina
Verifier, EQA								

BACK
SAVE
FORWARD

Select the **Admin role** from the dropdown.

Select role for selected users... STAGE 2 / 2

Role: Admin ▼

- Student
- Admin**
- Manager
- Teacher

BACK SAVE FORWARD

Select **Save** in order to assign an assessor to the group.

## Adding Learners to a Group

Select **Add Users**

**Testing**

Group Edit Group Edit Users Group Notes

Group Files Group Web Forms Add Group To Web Form

Show All Group Details Sub Groups Group Courses

Group Users

Group Details COPY GROUP

Group Title Testing

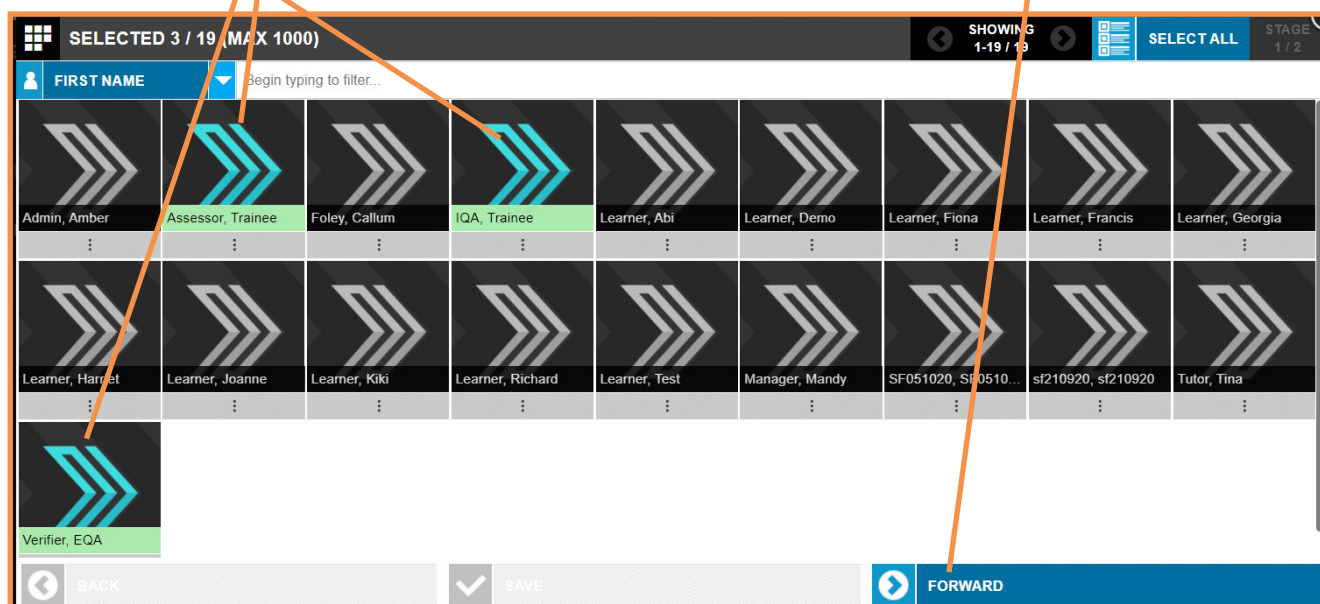
Group Type Default

Sub Groups ADD SUB GROUP

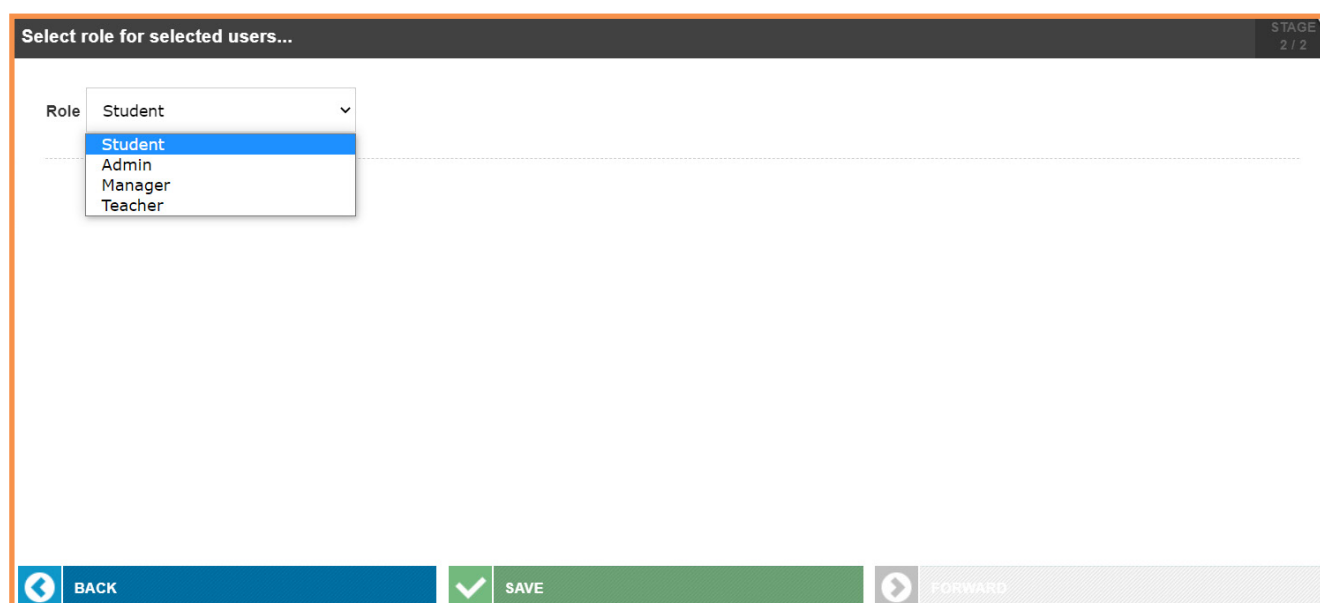
Group Courses ADD COURSES

Group Users ADD USERS

Select the **Learner/s** you would like for this group. Select **Forward**



Select the **Student** role from the dropdown.



Select **Save** in order to assign an learners to the group.

Repeat steps to add Learners on **page 10**, any time an assessor needs access to a new learner.

## Navigate to a Learner's Profile/Portfolio

Having logged onto the platform you will arrive at the Dashboard which is your home page.

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon > Select **edit user account** to receive a list of all users.

Find your Learner among the list, select **View User** to open a user profile.

19 Users + ADD NEW STUDENT

Filters |

Results |

	Name	Email address	Username	Learner Reference	Last access	Actions
	Admin, Amber		demopa		23 days 12 hours	VIEW USER
	Assessor, Trainee	Traineeassessor@demoportfollo.co.uk	traineeassessor		Never	VIEW USER
	Foley, Callum	callum@skillsforward.co.uk	callum@skillsforward.co.uk857563544		Never	VIEW USER
	IQA, Trainee	traineeiqa@demoportfollo.co.uk	traineeiqa		Never	VIEW USER
	Learner, Abi		demop1		104 days 10 hours	VIEW USER
	Learner, Demo		totaltraining		11 days 7 hours	VIEW USER
	Learner, Fiona		demop187		535 days 15 hours	VIEW USER
	Learner, Francis		demop16		1339 days 13 hours	VIEW USER
	Learner, Georgia		demop17		752 days 14 hours	VIEW USER
	Learner, Harriet		demop18		214 days 10 hours	VIEW USER
	Learner, Joanne	joanne.learner01@demo.com	joanne.learner01		Never	VIEW USER

Once on the Learners profile, select the **Portfolio tile** to be taken to there.

Home > Administration > Users > Fiona Learner

**Fiona Learner** Profile LOGIN AS

**Fiona Learner** 2 days 15 hours ago

Basic Info	More Details	Options
Username	demop187	
Email address		
Enrolment Type	User Add Page	
Authentication method	Skills Forward Password (manual)	
EPAO		

6 Courses + ADD COURSES

2 Qualifications + ADD QUALIFICATION

No Roles ^

# How to Assign a Qualification or Standard to a Learner

Navigate to the learners profile in question, On the learners profile select the **Add Qualification** button.

Home » Administration » Users » Fiona Learner

Fiona Learner Profile LOGIN AS

**Fiona Learner** 1 days 14 hours ago

**Basic Info** More Details Options

Username demopl87

Email address

Enrolment Type User Add Page

Authenticatio... Skills Forward Password (manual)

EPAO

6 Courses + ADD COURSES

2 Qualifications + ADD QUALIFICATION

Qualification	Reference	Date Started	Anticipated Completion Date	Actual Completion Date	Progress	On Track	Teacher Track	Actions
City & Guilds Level 2 NVQ Certificate in Customer Service (QCF)	500/9341/1	--	--	--	■■■■■■■■■■	-	-	QUALIFICATION

If a qualification has been assigned to another learner within your organisation, it will appear in this section already. In the event this is not the case, search for your qualification via the **blue button**.

Assign To Qualification

Pathway

Category  [SEARCH QUALIFICATIONS](#)

Qualifications

Customer Service Practitioner - STD/CSP ■ 0/1 required credits assigned

19 (M)

VTCT Level 2 NVQ Diploma in Hairdressing (QCF) - 601/6886/4 ■ 0/64 required credits assigned | 0/64 credits required at level (Level 2)

UHB20 (M) UHB21 (M) UHB22 (M)

UHB23 (M) UHB24 (M) UHB25 (M)

UHB26 (M)

Functional Skills Legacy ■

City & Guilds Level 2 NVQ Certificate in Customer Service (QCF) - 500/9341/1 ✓ 44/28 required credits assigned | 0/15 credits required at level (Level 2)

101 (M) 201 (M) 102 (O)

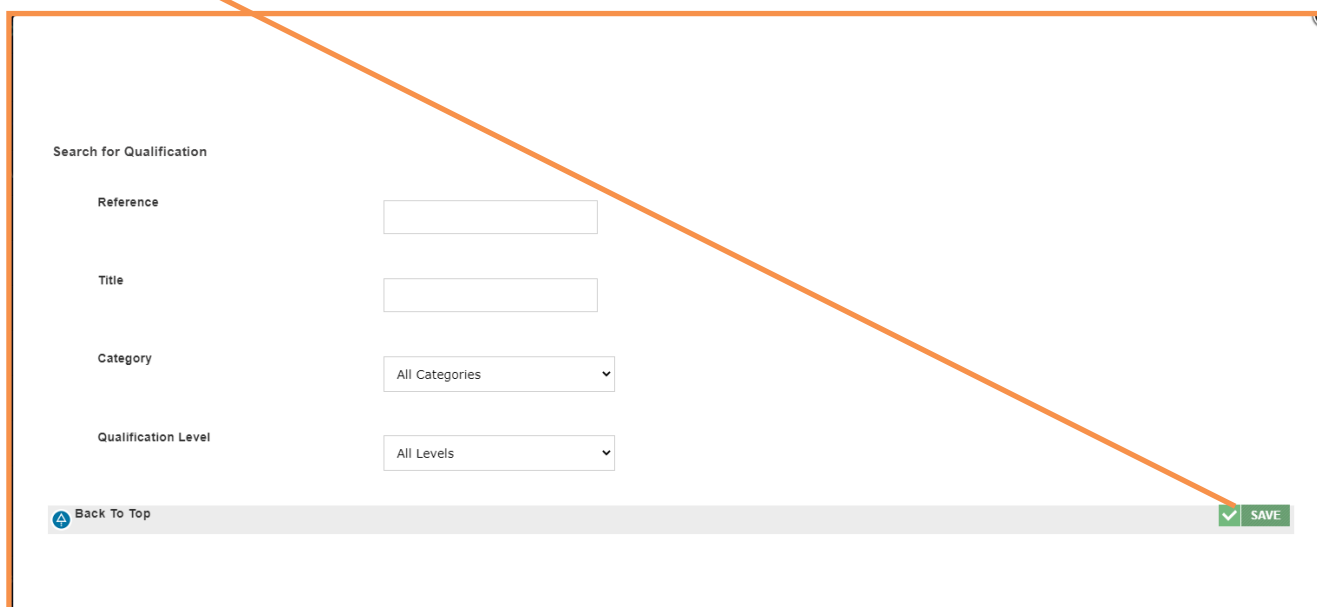
202 (O) 104 (O) 212 (O)

105 (O) 219 (O) 222 (O)

Business Administration Standard - ST0070 ✓ 21/1 required credits assigned

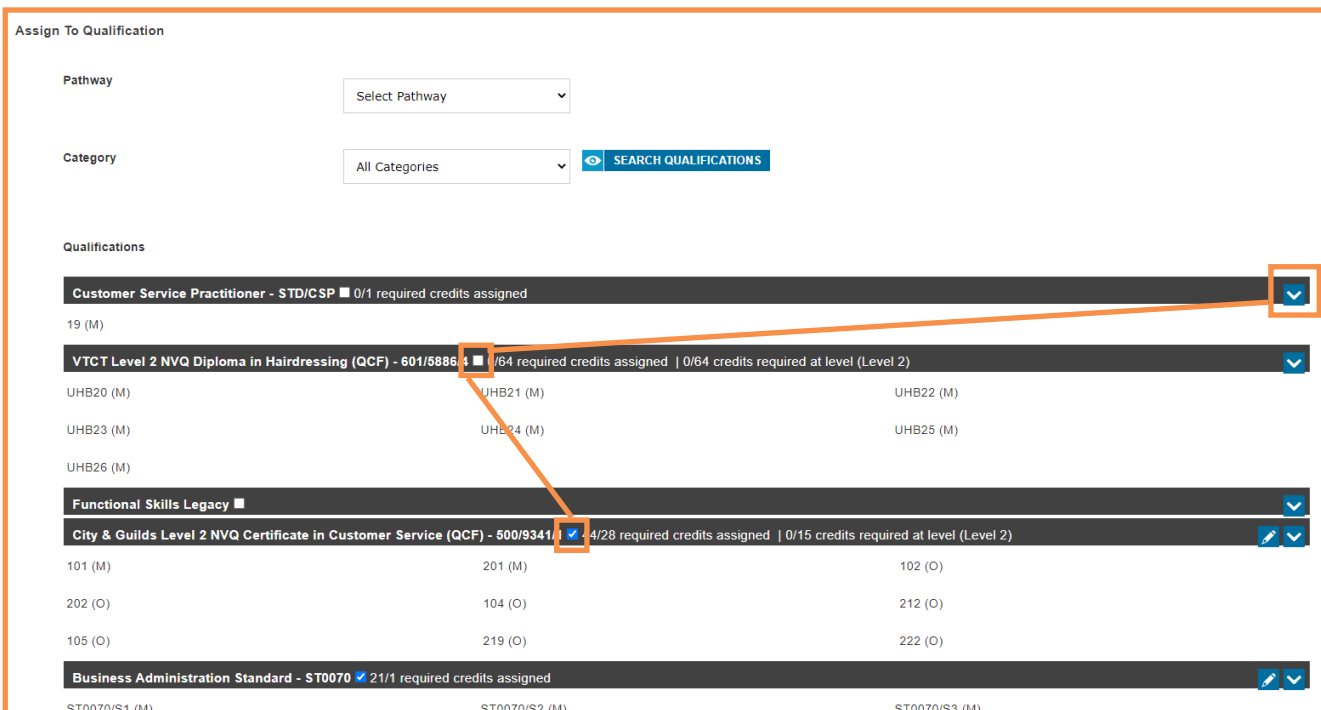
ST0070/S1 (M) ST0070/S2 (M) ST0070/S3 (M)

You can search for **qualification/standard** by specifying a **title** or **ref** and selecting **save**.



In the event your qual exists you will be able to use it from here. If not, raise a ticket to request the build of your qual.

Select the **blue dropdowns** and **tick** the optional units that relate to your learner once you have selected the qual of your choice.



**Assign To Qualification**

Pathway:

Category:  [SEARCH QUALIFICATIONS](#)

**Qualifications**

<b>Customer Service Practitioner - STD/CSP</b> <input type="checkbox"/> 0/1 required credits assigned			<input type="button" value="v"/>
19 (M)			
<b>VTCT Level 2 NVQ Diploma in Hairdressing (QCF) - 601/5886</b> <input type="checkbox"/> 0/64 required credits assigned   0/64 credits required at level (Level 2)			<input type="button" value="v"/>
UHB20 (M)	UHB21 (M)	UHB22 (M)	
UHB23 (M)	UHB24 (M)	UHB25 (M)	
UHB26 (M)			
<b>Functional Skills Legacy</b> <input type="checkbox"/>			<input type="button" value="v"/>
<b>City &amp; Guilds Level 2 NVQ Certificate in Customer Service (QCF) - 500/9341</b> <input checked="" type="checkbox"/> 4/28 required credits assigned   0/15 credits required at level (Level 2)			<input type="button" value="v"/>
101 (M)	201 (M)	102 (O)	
202 (O)	104 (O)	212 (O)	
105 (O)	219 (O)	222 (O)	
<b>Business Administration Standard - ST0070</b> <input checked="" type="checkbox"/> 21/1 required credits assigned			<input type="button" value="v"/>
ST0070/S1 (M)	ST0070/S2 (M)	ST0070/S3 (M)	

Specify the **start** and **completion date** for this learner.  
 Select the **Create Portfolio** tick box.  
 Select **Update** to finalise changes.

**Date Started** 8/10/2020

**Anticipated Completion Date** 30/10/2020

**Set dates for Unit(s)**

**Create Portfolio**

**UPDATE**

## Upload Evidence on behalf of your Learner

Navigate to the **Learners Portfolio**. Next select the **Add Evidence** tile.

**Your Learners Name** **Portfolio**

### Skills Portfolio

**Qualification(s)**

Current 0%  
Expected Insufficient target data (0/2 set)

**Off-The-Job Training (OTJ)**

Current 1 hours  
Expected Not set

**Current Qualifications**

**VTCT Level 2 NVQ Diploma in Hairdressing (QCF)**

Current 0%  
Expected Insufficient target data (0/1 set)

**Customer Service Practitioner**

Current 0%  
Expected Insufficient target data (0/1 set)









**Evidence**

ADD EVIDENCE UNLINKED ACCEPTED REFERRED PLANNED



Select the **Evidence Type** from the options given.

### Select Evidence Type

 <b>Assignment</b> Written document covering criteria	 <b>Professional Discussion</b> One-to-one or group discussion & tutorial
 <b>Digital Evidence</b> Voice recording, photo or videos evidence	 <b>Reflective Account</b> Reflective Account
 <b>Question &amp; Answer</b> Oral questioning	 <b>Witness Testimony</b> Professionally competent statement or reference
 <b>Product Evidence</b> Documents to support criteria	 <b>Test or Exam</b> Mandatory or Non-Mandatory test papers

Give your piece of evidence a **Title** and specify some **Details** surrounding the evidence you are uploading.

Add Evidence Details Qualifications UPDATE

#### Details


Title


Details 


Details / Description for the Evidence.

**Drag and drop the file** of evidence to the grey box with dotted lines section of this page.

#### Files


 Upload a File

 Online Document

 Online Video

Upload

Drag files or click here to upload



(max size: 125MB per upload)

Alternatively you can use the Upload button to select it.

Map your criteria to the relevant criteria within the unit by using the **blue dropdowns** in relation to your specific unit.

Here you will be able to **check the tick box** in relation to the relevant unit.

**Qualifications**

**Customer Service Practitioner**

19 - End Point Assessment

**VTCT Level 2 NVQ Diploma in Hairdressing (QCF)**

UHB20 - Style and finish hair

UHB21 - Set and dress hair

UHB22 - Cut Hair Using Basic Techniques

UHB23 - Colour and lighten hair

UHB24 - Advise and consult with clients

UHB25 - Shampoo condition and treat the hair and scalp

UHB26 - Develop and maintain your effectiveness at work

select **Update**

Back To Top ✓ UPDATE ✗ CANCEL

As the previous section to map your criteria to the relevant criteria within the unit by using the blue dropdowns in relation to your specific unit. Here you will be able to fill the tick box in relation to the relevant criteria.

**Link Evidence to Criteria**

**VTCT Level 2 NVQ Diploma in Hairdressing (QCF):** UHB23 - Colour and lighten hair

**Performance Criteria**

<input type="checkbox"/> P1	<input type="checkbox"/> P8.2	<input type="checkbox"/> P13	<input type="checkbox"/> P22	<input type="checkbox"/> P31
<input type="checkbox"/> P2	<input type="checkbox"/> P8.3	<input type="checkbox"/> P14	<input type="checkbox"/> P23	<input type="checkbox"/> P32
<input type="checkbox"/> P3	<input type="checkbox"/> P8.4	<input type="checkbox"/> P15	<input type="checkbox"/> P24	<input type="checkbox"/> P33
<input type="checkbox"/> P4	<input type="checkbox"/> P8.5	<input type="checkbox"/> P16	<input type="checkbox"/> P25	<input type="checkbox"/> P34
<input type="checkbox"/> P5	<input type="checkbox"/> P8.6	<input type="checkbox"/> P17	<input type="checkbox"/> P26	<input type="checkbox"/> P35
<input type="checkbox"/> P6	<input type="checkbox"/> P9	<input type="checkbox"/> P18	<input type="checkbox"/> P27	<input type="checkbox"/> P36
<input type="checkbox"/> P7	<input type="checkbox"/> P10	<input type="checkbox"/> P19	<input type="checkbox"/> P28	<input type="checkbox"/> P37
<input checked="" type="checkbox"/> P8	<input type="checkbox"/> P11	<input type="checkbox"/> P20	<input type="checkbox"/> P29	<input type="checkbox"/> P38
<input type="checkbox"/> P8.1	<input type="checkbox"/> P12	<input type="checkbox"/> P21	<input type="checkbox"/> P30	

**Range**  
None Selected

**Knowledge**  
None Selected

**UHB24 - Advise and consult with clients**

**Press and Update to successfully upload Evidence.**

✓ UPDATE

# View your Caseload/Learners OJT Progression

From your homepage select the **off the job training** tile.

The screenshot shows the Skills Portfolio dashboard. On the left is a navigation menu with items: Dashboard, MyPins, Administration, SkillsPortfolio, Meetings, Help, and Settings. The main content area is titled 'SkillsPortfolio' and includes a 'Qualification(s)' section with a pie chart showing: Not Set (7), On Target (1), and Concern (8). Below this is an 'Activity' section with three tiles: SUBMITTED (4 WEEKS) with 3 evidence items, UPDATED with 2 evidence items, and ADD FOR GROUP. A 'Quick Links' section contains six tiles: PLAN (27%), VIEW LIST, VIDEO, VIEW, VIEW (ILP), and VIEW (LEARNING LOG). A box highlights the 'Off-The-Job Training (OTJ)' tile, which shows 'Users on target' at 1/7 Users and 'Total Expected' at 770/2124 hours.

Filters

Results

ADD MULTIPLE LOGS

Name	Total Off-The-Job Training (OTJ) Time	Expected Off-The-Job Training (OTJ) Time	Total Time	Last Completed	Total Logs	Actions
Learner, Abi	432:00	368	432:00	02/10/2020	35	OPEN LOGS
Learner, Demo	01:00	0	01:00	04/10/2020	1	OPEN LOGS
Learner, Fiona	90:00	396	90:00	24/04/2019	8	OPEN LOGS
Learner, Francis	04:00	368	04:00	08/05/2017	1	OPEN LOGS
Learner, Georgia	114:00	368	114:00	08/08/2018	3	OPEN LOGS
Learner, Harriet	167:41	368	167:41	23/07/2018	8	OPEN LOGS
Learner, Kiki	02:30	0	02:30	01/12/2017	1	OPEN LOGS
Learner, Richard	14:00	368	14:00	02/04/2019	4	OPEN LOGS

Here you will be able to see a page that lists your learners, the **first column** in the list will inform you of a learners **total off the job training hours**.

The **second column** in the list will specify the **hours of off- the job training** expected of this learner, you could use this to measure progress.

The **fourth column** will specify the **date** in which this learner last completed OJT.

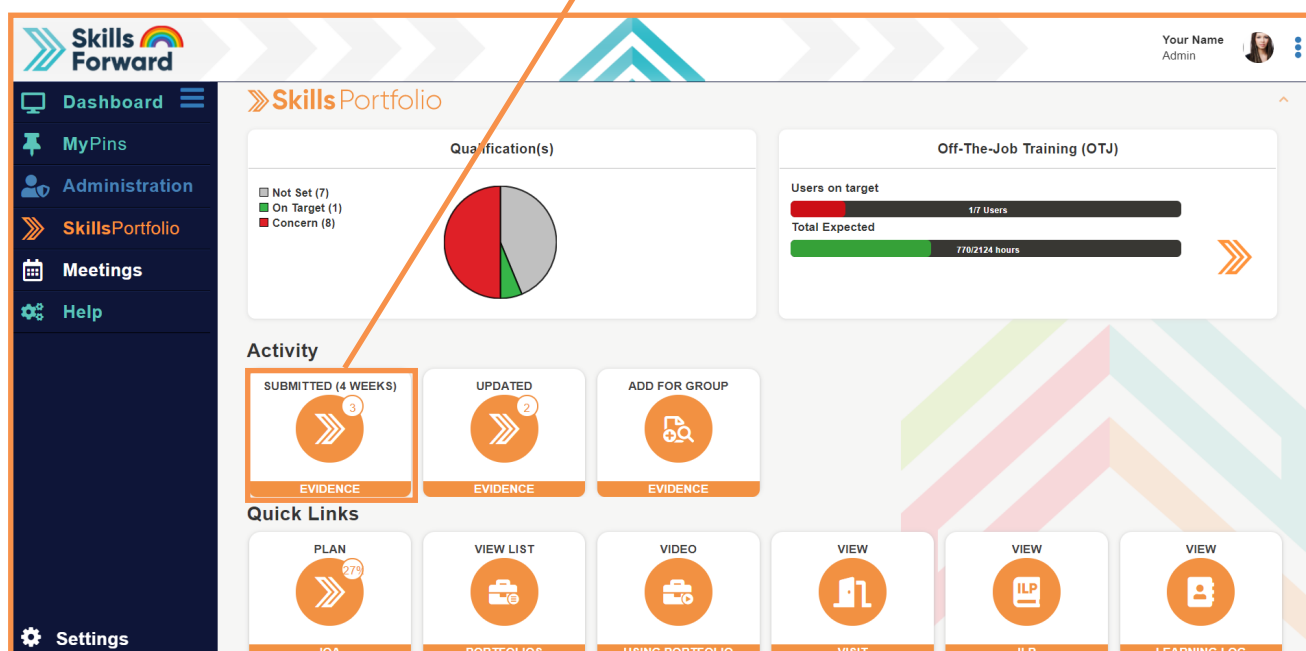
To open **all of a learners logs** be sure to select the **open logs button** in the **7th column** of this page, if there is no button next to the learner this would indicate there are no logs



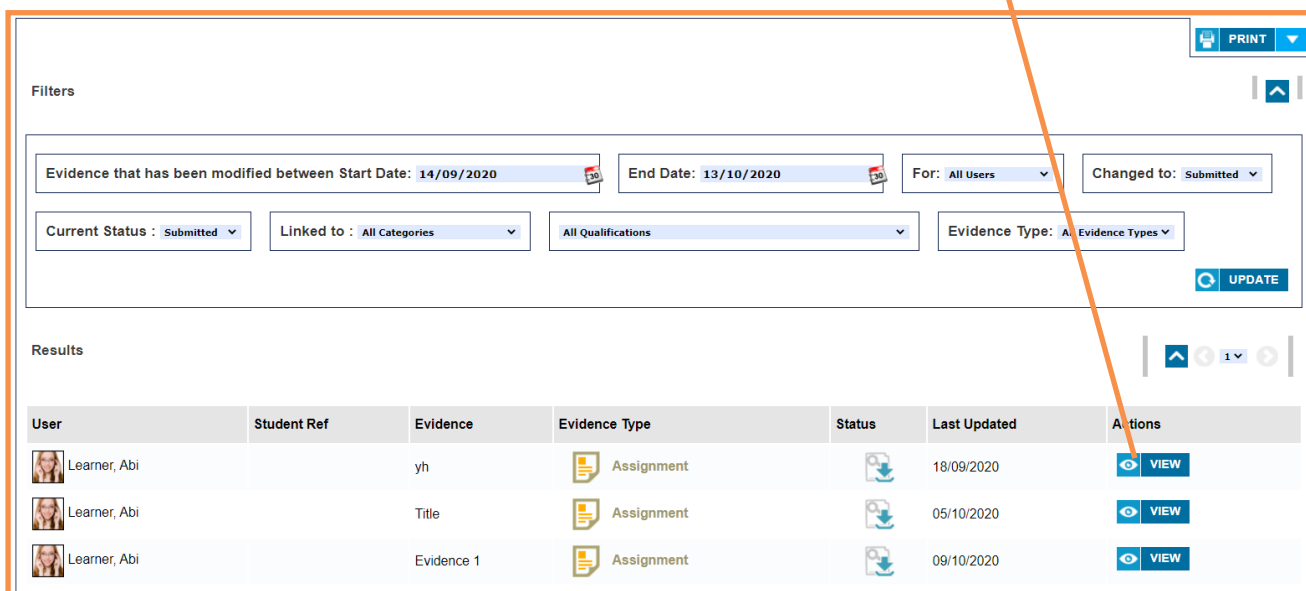
Name	Total Off-The-Job Training (OTJ) Time	Expected Off-The-Job Training (OTJ) Time	Total Time	Last Completed	Total Logs	Actions
 Learner, Abi	432:00	368	432:00	02/10/2020	35	 OPEN LOGS
 Learner, Demo	01:00	0	01:00	04/10/2020	1	 OPEN LOGS
 Learner, Fiona	90:00	396	90:00	24/04/2019	8	 OPEN LOGS
 Learner, Francis	04:00	368	04:00	08/05/2017	1	 OPEN LOGS
 Learner, Georgia	114:00	368	114:00	08/08/2018	3	 OPEN LOGS
 Learner, Harriet	167:41	368	167:41	23/07/2018	8	 OPEN LOGS
 Learner, Kiki	02:30	0	02:30	01/12/2017	1	 OPEN LOGS
 Learner, Richard	14:00	368	14:00	02/04/2019	4	 OPEN LOGS

# How to Assess/Mark Submitted Evidence

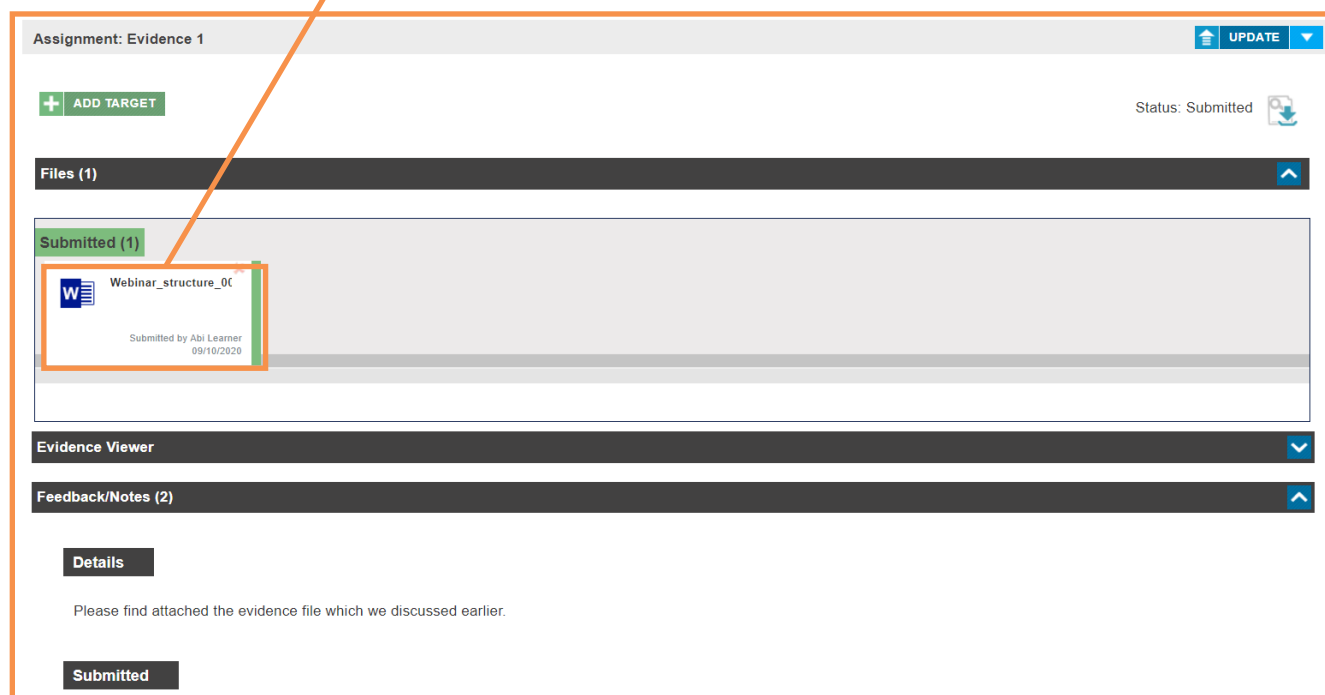
From homepage select the **Submitted** tile in the activity section.



Here you will be able to see every piece of evidence that has the status of submitted, to begin the process of marking, select the **View** button.



Here will be the details of the piece of evidence that has been submitted. Firstly, select on the attached file, where applicable in order to access it externally to the platform.



Assignment: Evidence 1 UPDATE

+ ADD TARGET Status: Submitted

**Files (1)**

**Submitted (1)**

Webinar\_structure\_0t  
Submitted by Abi Learner  
09/10/2020

**Evidence Viewer**

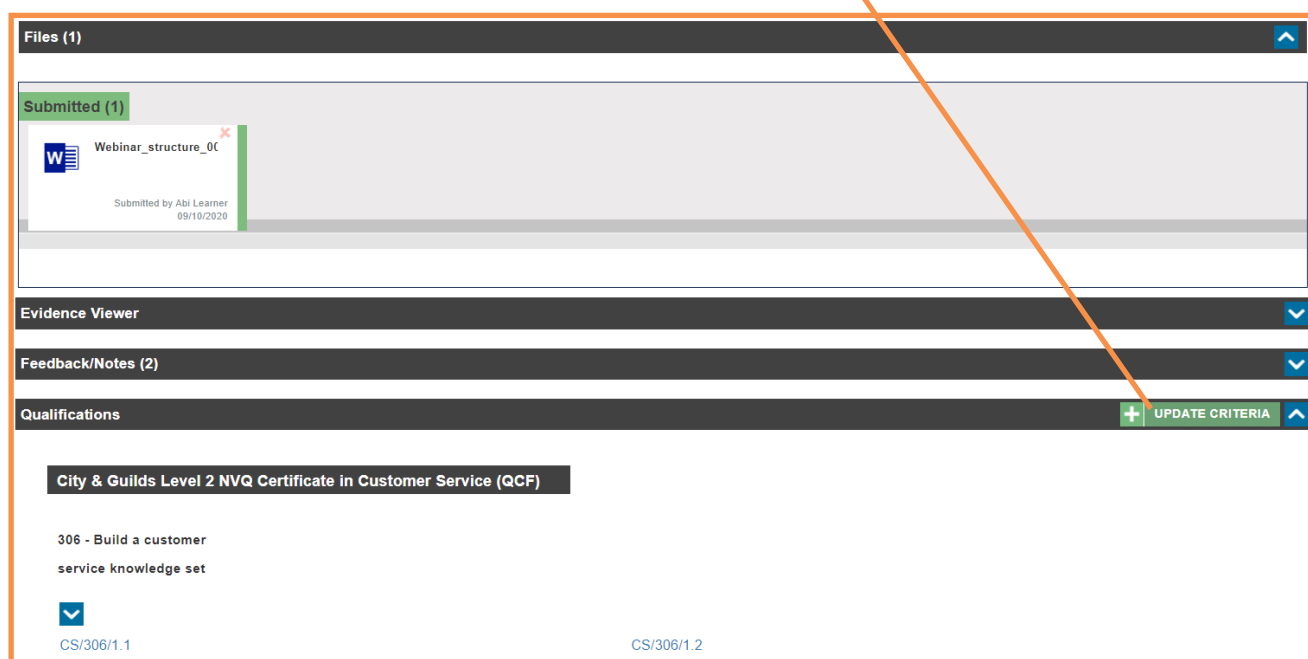
**Feedback/Notes (2)**

**Details**

Please find attached the evidence file which we discussed earlier.

**Submitted**

Having reviewed the evidence map to the unit(s)/criteria in which the learner is assigned to. To begin this process select the **Update Criteria** button.



**Files (1)**

**Submitted (1)**

Webinar\_structure\_0t ✕  
Submitted by Abi Learner  
09/10/2020

**Evidence Viewer**

**Feedback/Notes (2)**

**Qualifications** + UPDATE CRITERIA

**City & Guilds Level 2 NVQ Certificate in Customer Service (QCF)**

306 - Build a customer service knowledge set

CS/306/1.1 CS/306/1.2

Use a **blue dropdown** on the relevant qualification/standard in order to view the units within the qualification/standard and choose accordingly.









Select **Update**.

To mark the evidence, return to the evidence page you would like to mark and Select the blue **Update** button.

Select the **Status** you would like to mark the evidence from the dropdown and select **Submit** in order to finalise the marking of this piece of evidence.

Select the **Evidence Type** from the options given.

### Select Evidence Type

 <b>Assignment</b> Written document covering criteria	 <b>Professional Discussion</b> One-to-one or group discussion & tutorial
 <b>Digital Evidence</b> Voice recording, photo or videos evidence	 <b>Reflective Account</b> Reflective Account
 <b>Question &amp; Answer</b> Oral questioning	 <b>Witness Testimony</b> Professionally competent statement or reference
 <b>Product Evidence</b> Documents to support criteria	 <b>Test or Exam</b> Mandatory or Non-Mandatory test papers

Give your piece of evidence a **Title** and specify some **Details** surrounding the evidence you are uploading.

Add Evidence Details Qualifications UPDATE

#### Details

Title


Details 


Details / Description for the Evidence.

**Drag and drop the file** of evidence to the grey box with dotted lines section of this page.

#### Files


Upload a File

 Online Document

 Online Video

Upload

Drag files or click here to upload



(max size: 125MB per upload )

**Alternatively you can use the Upload button to select it.**



If your training provider has requested this to be set, map your criteria to the relevant qualification unit by using the **blue dropdowns** in relation to your specific qualification.

Here you will be able to **check the tick box** in relation to the relevant unit.

**Qualifications**

**Customer Service Practitioner**

19 - End Point Assessment

**VTCT Level 2 NVQ Diploma in Hairdressing (QCF)**

UHB20 - Style and finish hair

UHB21 - Set and dress hair

UHB22 - Cut Hair Using Basic Techniques

UHB23 - Colour and lighten hair

UHB24 - Advise and consult with clients

UHB25 - Shampoo condition and treat the hair and scalp

UHB26 - Develop and maintain your effectiveness at work

select **Update**

Back To Top ✓ UPDATE ✗ CANCEL

As the previous section to map your criteria to the relevant criteria within the unit by using the blue dropdowns in relation to your specific unit. Here you will be able to fill the tick box in relation to the relevant criteria.

**Link Evidence to Criteria**

VTCT Level 2 NVQ Diploma in Hairdressing (QCF): UHB23 - Colour and lighten hair

**Performance Criteria**

<input type="checkbox"/> P1	<input type="checkbox"/> P8.2	<input type="checkbox"/> P13	<input type="checkbox"/> P22	<input type="checkbox"/> P31
<input type="checkbox"/> P2	<input type="checkbox"/> P8.3	<input type="checkbox"/> P14	<input type="checkbox"/> P23	<input type="checkbox"/> P32
<input type="checkbox"/> P3	<input type="checkbox"/> P8.4	<input type="checkbox"/> P15	<input type="checkbox"/> P24	<input type="checkbox"/> P33
<input type="checkbox"/> P4	<input type="checkbox"/> P8.5	<input type="checkbox"/> P16	<input type="checkbox"/> P25	<input type="checkbox"/> P34
<input type="checkbox"/> P5	<input type="checkbox"/> P8.6	<input type="checkbox"/> P17	<input type="checkbox"/> P26	<input type="checkbox"/> P35
<input type="checkbox"/> P6	<input type="checkbox"/> P9	<input type="checkbox"/> P18	<input type="checkbox"/> P27	<input type="checkbox"/> P36
<input type="checkbox"/> P7	<input type="checkbox"/> P10	<input type="checkbox"/> P19	<input type="checkbox"/> P28	<input type="checkbox"/> P37
<input checked="" type="checkbox"/> P8	<input type="checkbox"/> P11	<input type="checkbox"/> P20	<input type="checkbox"/> P29	<input type="checkbox"/> P38
<input type="checkbox"/> P8.1	<input type="checkbox"/> P12	<input type="checkbox"/> P21	<input type="checkbox"/> P30	

**Range**  
None Selected

**Knowledge**  
None Selected

UHB24 - Advise and consult with clients

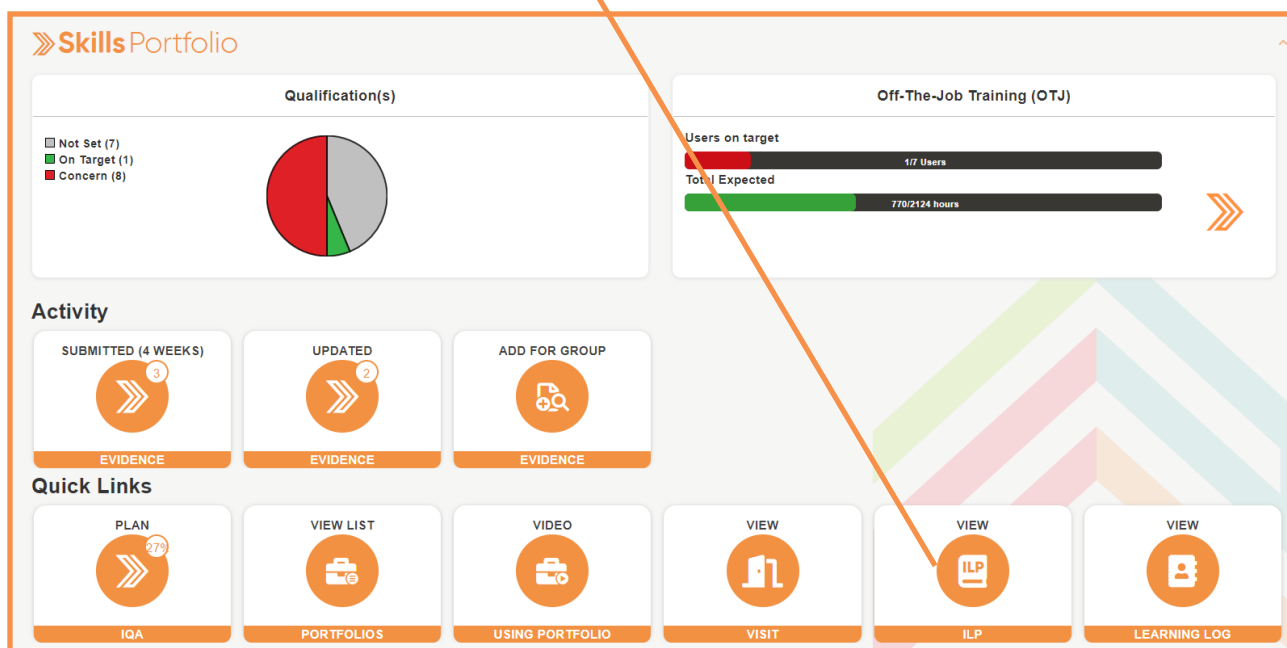
**Press and Update to successfully upload Evidence.**

✓ UPDATE

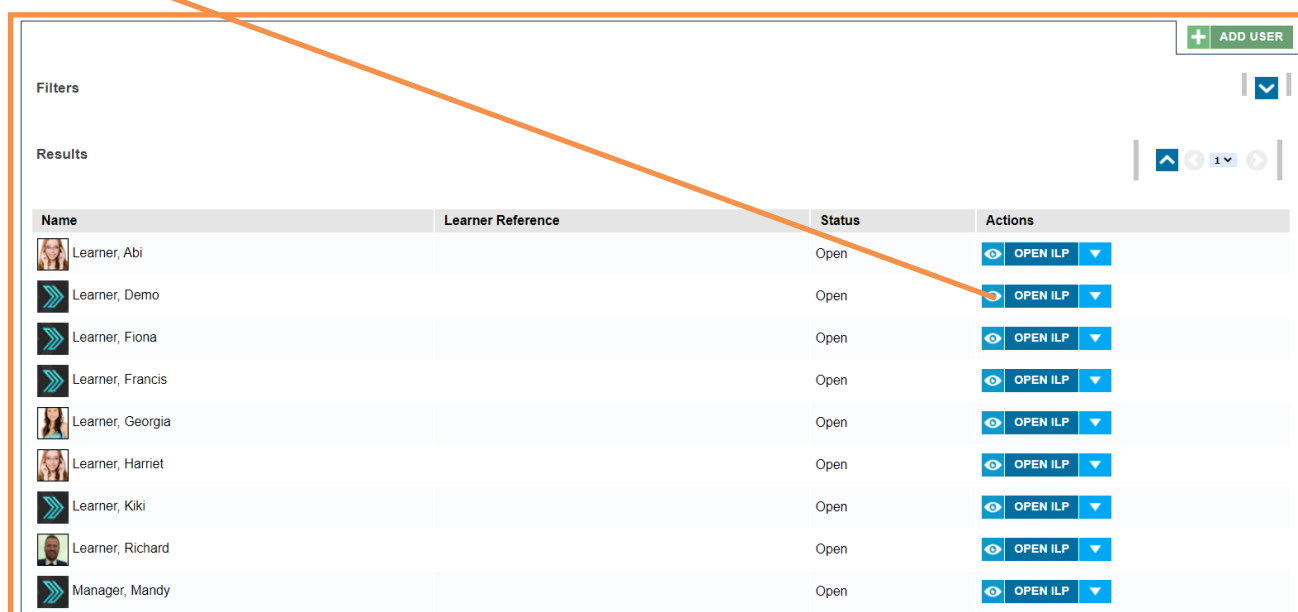
# How to Complete/View an ILP (Individual Learner Plan)

Skills forward allows you to document this electronically via our default, editable ILP. If you have an ILP or your own you wish to use instead please send this to your account manager and we'll create that on the site for you.

From your home page, select the **ILP tile**.



Here you will be able to see a list of all learners within your group, select the **Open ILP button** that relates to your chosen learner.



You will now be able to start completing your document electronically, and select the **Save** button after completing a page in order to save progress.

**Learner Details**

**Privacy Notice How We Use Your Personal Information**  
**How We Use Your Personal Information**  
 The personal information you supply will be used by the Skills Funding Agency, an Executive Agency for the Department of Business, Innovation and Skills, to issue you with a Unique Learner Number (ULN) and create your Personal Learning Record (PLR). For more information about how your information is processed and shared refer to the Extended Privacy Notice available on Gov.uk.  
**Data Protection Act 1998:**  
 The information you provide may be shared with other organisations for education, training, employment and well-being related purposes, including for research. You may be contacted during and after you have completed your programme of learning to establish whether you have entered employment or gone into further education or training. You may be contacted by the European Social Fund (ESF) Managing Authority, or its agents, to carry out research and evaluation to inform the effectiveness of the programme

**Learner Details**

Title:	Choose	Name:	Abi Learner	Date of Birth:	N.I Number :
Gender:	Unknown	Ethnicity:	Choose	E-mail Address:	Contact Number:
Age at start:		Mobile No:			
Apprentice Address:					

## How to Record/Review a Visit

Skills forward allows you to document your learner’s progress electronically via our default, editable visits. If you have a visit(s) or your own you wish to use instead please send them to your account manager and we’ll create that on the site for you.

From your home page, select the **Visit tile**.

**SkillsPortfolio**

**Qualification(s)**

- Not Set (7)
- On Target (1)
- Concern (8)

**Off-The-Job Training (OTJ)**

Users on target: 1/7 Users

Total Expected: 770/2124 hours

**Activity**

- SUBMITTED (4 WEEKS) 3
- UPDATED 2
- ADD FOR GROUP

**Quick Links**

- PLAN 279 IQA
- VIEW LIST PORTFOLIOS
- VIDEO USING PORTFOLIO
- VIEW VISIT
- VIEW ILP
- VIEW LEARNING LOG

Here you will be able to see a list of all learners within your group, users with an open visits tile indicates they already have visits recorded whereas the users with start visit don't have any recorded as of yet.

Depending on the type of user, select the **Open Visit** or the **Start Visit** button.

The screenshot shows a table of learners with columns for Name, Learner Reference, Last Visit, Visits, and Actions. Callout lines point from the text above to the 'Open Visits' and 'Start Visit' buttons in the Actions column.

Name	Learner Reference	Last Visit	Visits	Actions
Learner, Abi		--	14	OPEN VISITS
Learner, Fiona		--	4	OPEN VISITS
Learner, Joanne		--	1	OPEN VISITS
Learner, Richard		--	5	OPEN VISITS
SF051020, SF051020		--	0	START VISIT
sf210920, sf210920		--	0	START VISIT

You will now be able to select the start visit tile that relates to the visit type you are aiming to document, for the **open visit users** you will need to select the green **New Visit** button before selecting the Visit type.

Portfolio Visit List For Abi Learner

The screenshot shows a table of visit types for Abi Learner. A callout line points from the text above to the '+ NEW VISIT' button in the top right corner.

Visit Type	Number Of Visits	Last Visit status	Last Visit Date	Next Visit Date	Signature Count	Actions
4 Week	2	--	--	--		OPEN VISIT
Teaching, Learning & Assessment visit	4	--		27/07/2018		OPEN VISIT
Review	7	--	--	--		OPEN VISIT

Start visit

The screenshot shows a table for selecting a start visit type. Each row has a 'START VISIT' button with a dropdown arrow.

Visit Type	Number Of Visits	Min Days	Max Days	Actions
Review	7	0	31	START VISIT
Teaching, Learning & Assessment visit	4			START VISIT
4 Week	2			START VISIT

You will now be able to start completing your document electronically, select the **Save button** after completing a page in order to save progress.

Target	Unit Associated to	Target Date	Date Completed	ACTIONS	REMOVE
Complete knowledge	Advise and consult with clients (UHB24)	30/11/2016	-	OPEN TARGET	DELETE TARGET
Complete 04/04/18	Style and finish hair (UHB20)	01/01/1970	01/05/2020	OPEN TARGET	DELETE TARGET
Complete Last Two months work	Style and finish hair (UHB20)	23/08/2019	02/06/2020	OPEN TARGET	DELETE TARGET
Complete Test	Style and finish hair (UHB20)	01/01/1970	20/05/2020	OPEN TARGET	DELETE TARGET
Complete TEst 011019	Style and finish hair (UHB20)	01/01/1970	15/05/2020	OPEN TARGET	DELETE TARGET

Use the **dropdown button** to change the page of this doc, ensuring you are completing every field and selecting **save** throughout.

Employer Name:

Reflection

What have you learnt?

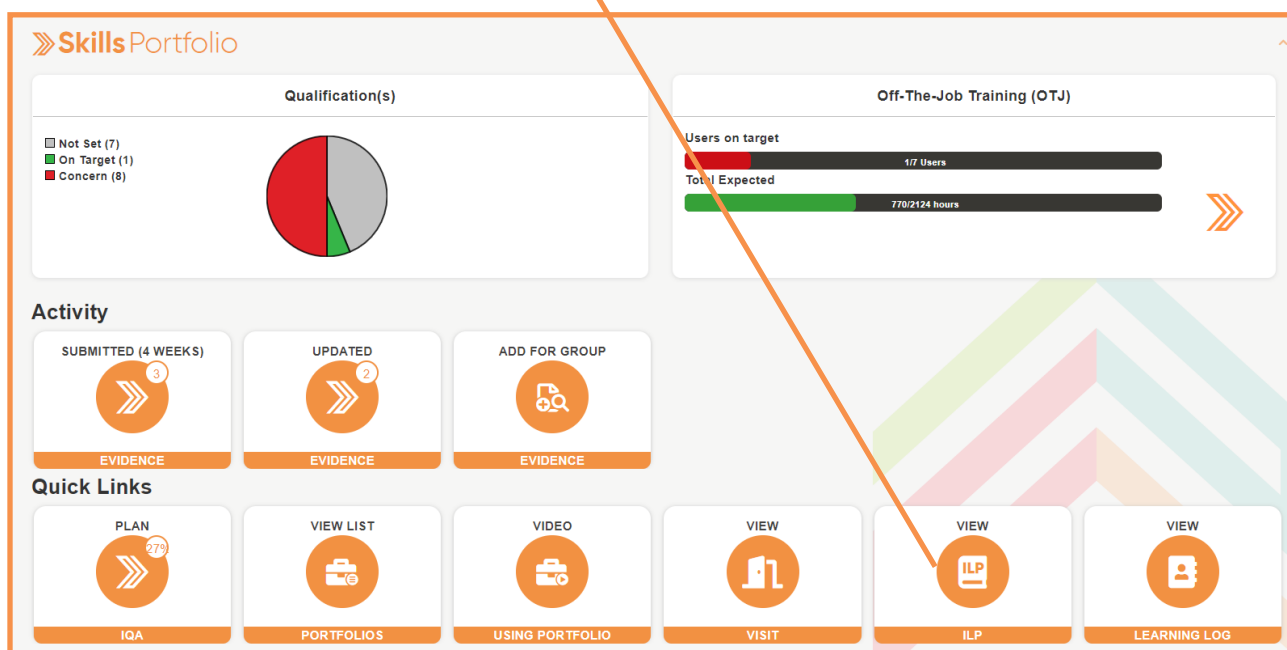
How have you applied this?

What difference has this made?

Overview of progress made against last visits objectives

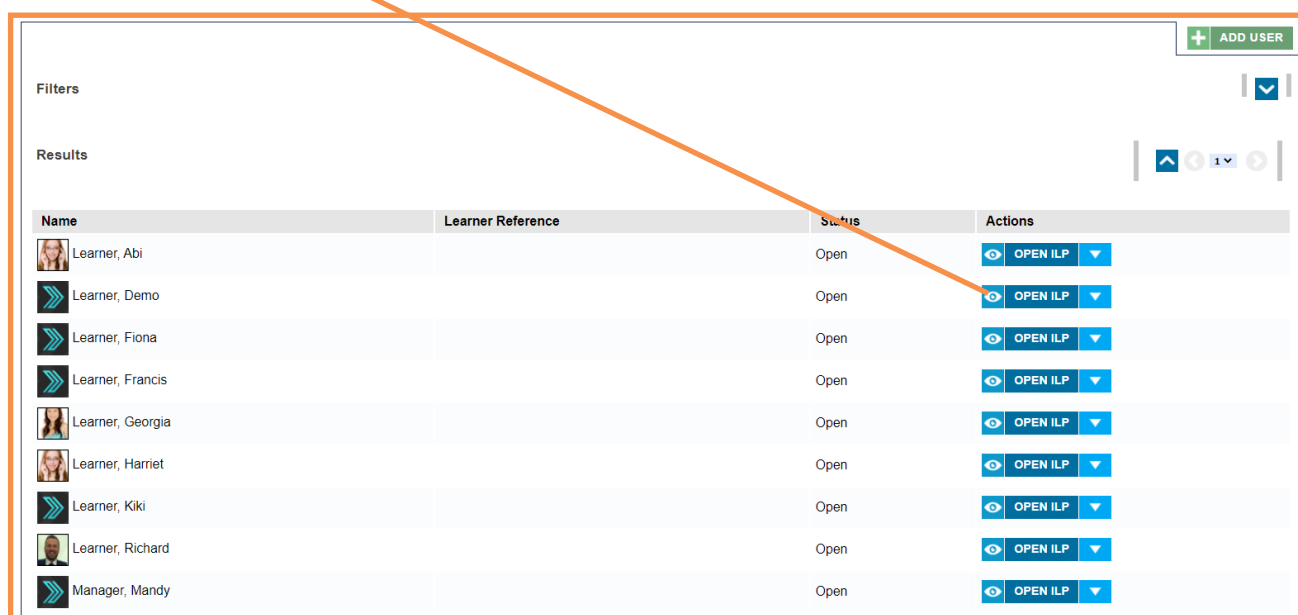
# How to View Visits

From your home page, select the **ILP** tile.



Here you will be able to see a list of all learners within your group, users with an open visits button indicates they already have visits recorded whereas the users with start visit don't have any recorded as of yet.

Select the **Open Visits** button that relates to your chosen learner.

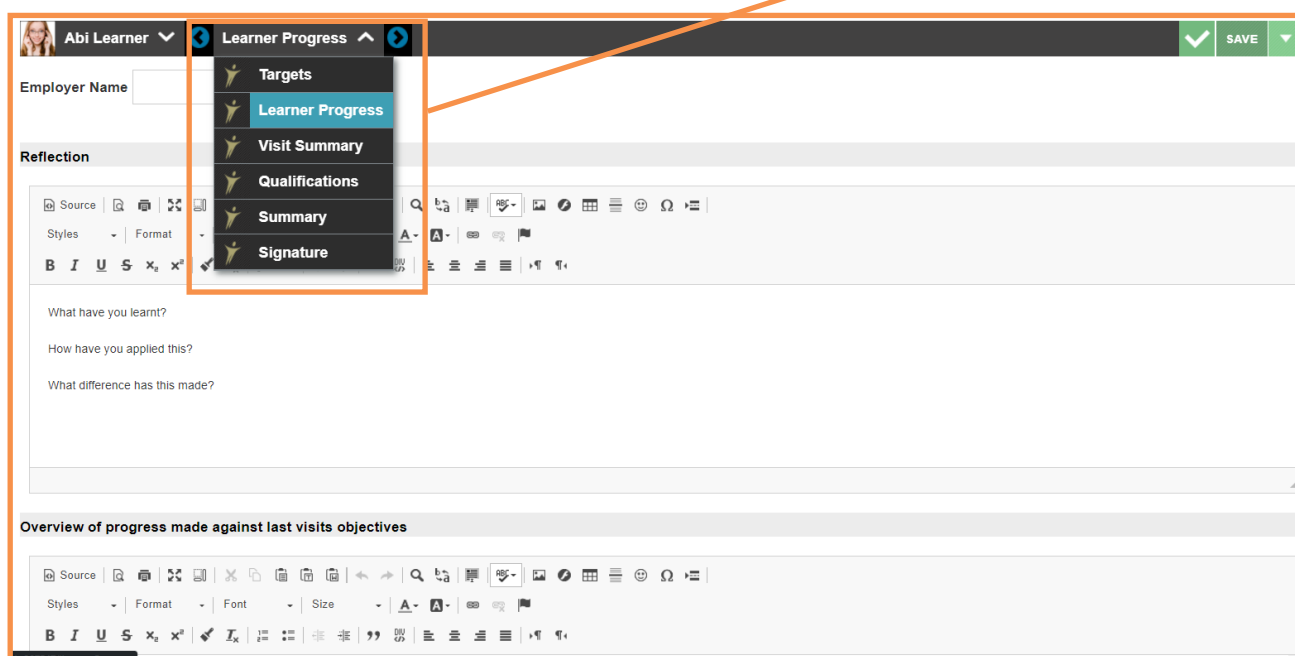


The recorded visits are categorised by type, select the **Open Visit** button that relates to your chosen visit type.

Portfolio Visit List For Abi Learner + NEW VISIT

Visit Type	Number Of Visits	Last Visit status	Last Visit Date	Next Visit Date	Signature Count	Actions
4 Week	2		--	--		OPEN VISIT
Teaching, Learning & Assessment visit	4		--	27/07/2018		OPEN VISIT
Review	7		--	--		OPEN VISIT

You will now be able to see the recorded visit, use the **dropdown menu** to change the page of this doc.



The screenshot shows a document editor interface for 'Abi Learner'. A dropdown menu is open under the 'Learner Progress' tab, listing several options: Targets, Learner Progress (highlighted), Visit Summary, Qualifications, Summary, and Signature. The document content includes a 'Reflection' section with prompts like 'What have you learnt?' and 'How have you applied this?'. Below the reflection is an 'Overview of progress made against last visits objectives' section. The interface includes a top navigation bar with a 'SAVE' button and a bottom toolbar with various editing tools.

# How to Build an Assessment Plan

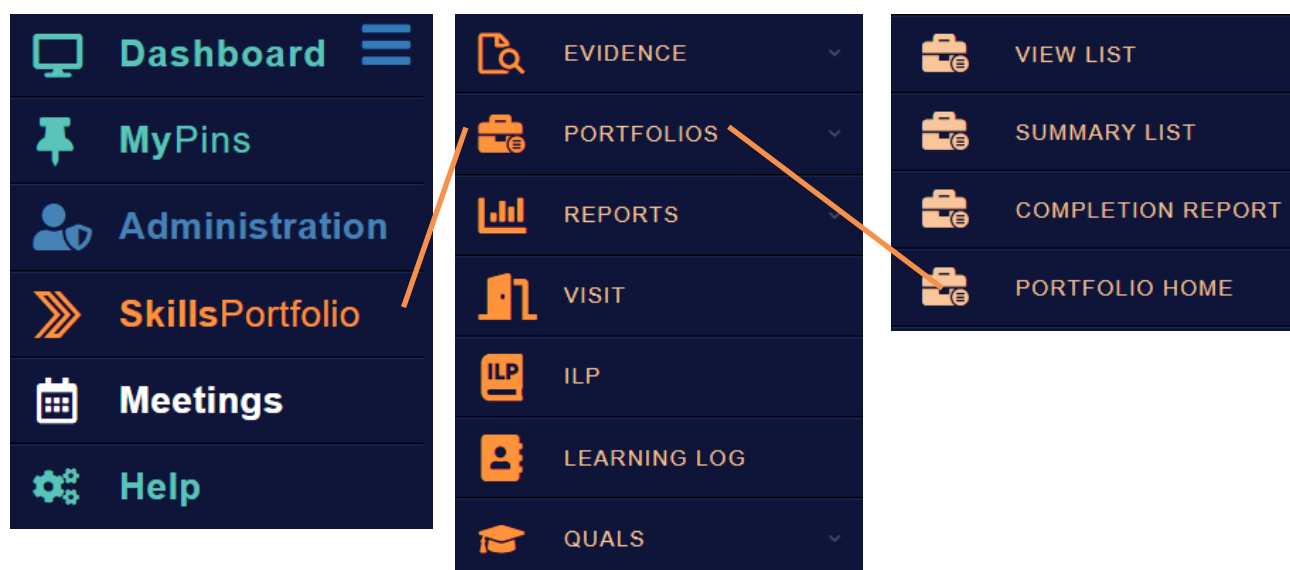
## What is an assessment plan?

An assessment plan is for portfolio users only. An assessment plan is a series of tasks/instructions hosted on templates that can be assigned to learner's profiles. These tasks/instructions are evidence that are directly linked to criteria present in a qualification they are assigned too. Once the task has been completed it will mark off progression in relation to their qualification.

You must be an **administrator** to create an assessment plan; customers have the rights to do so.

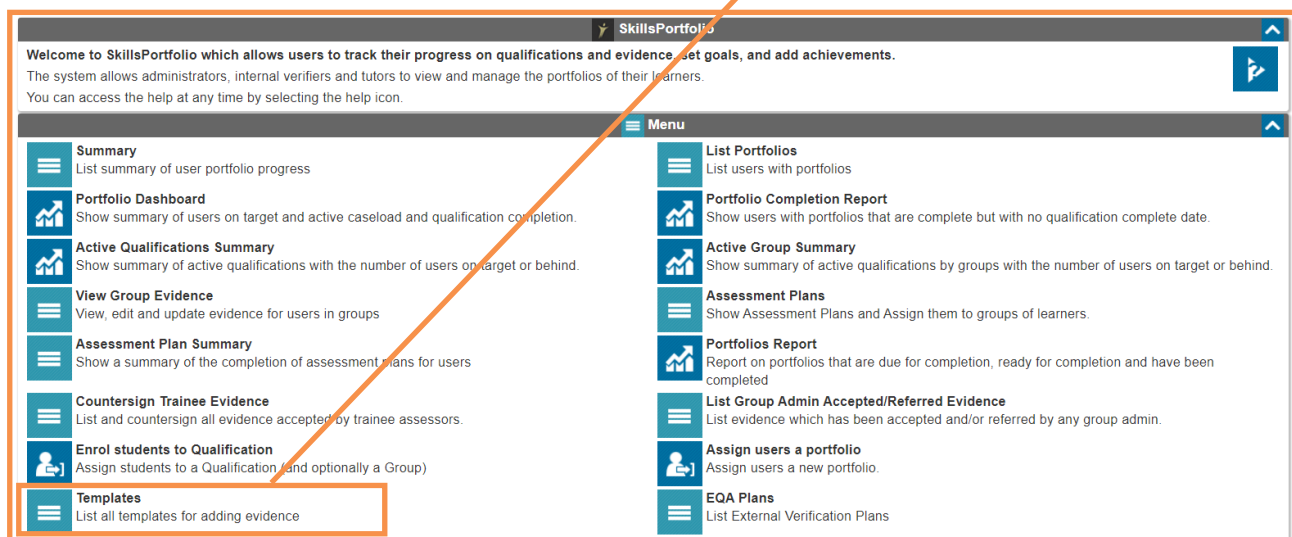
In order to create an assessment plan first you must create templates that hold the relevant instruction, and are linked to the units and criteria as required. They are then added to the assessment plan and sequenced as desired.

From the home page, select the portfolio button that appears on the side tool bar. Select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.





From portfolio home select the button **'Templates'**.



The screenshot shows the SkillsPortfolio home page. At the top, there is a header with the text: "Welcome to SkillsPortfolio which allows users to track their progress on qualifications and evidence, set goals, and add achievements. The system allows administrators, internal verifiers and tutors to view and manage the portfolios of their learners. You can access the help at any time by selecting the help icon." Below the header is a "Menu" section with two columns of items. The "Templates" item in the left column is highlighted with a red box, and a red arrow points from the text above to this item.

Menu	
<b>Summary</b> List summary of user portfolio progress	<b>List Portfolios</b> List users with portfolios
<b>Portfolio Dashboard</b> Show summary of users on target and active caseload and qualification completion.	<b>Portfolio Completion Report</b> Show users with portfolios that are complete but with no qualification complete date.
<b>Active Qualifications Summary</b> Show summary of active qualifications with the number of users on target or behind.	<b>Active Group Summary</b> Show summary of active qualifications by groups with the number of users on target or behind.
<b>View Group Evidence</b> View, edit and update evidence for users in groups	<b>Assessment Plans</b> Show Assessment Plans and Assign them to groups of learners.
<b>Assessment Plan Summary</b> Show a summary of the completion of assessment plans for users	<b>Portfolios Report</b> Report on portfolios that are due for completion, ready for completion and have been completed
<b>Countersign Trainee Evidence</b> List and countersign all evidence accepted by trainee assessors.	<b>List Group Admin Accepted/Referred Evidence</b> List evidence which has been accepted and/or referred by any group admin.
<b>Enrol students to Qualification</b> Assign students to a Qualification (and optionally a Group)	<b>Assign users a portfolio</b> Assign users a new portfolio.
<b>Templates</b> List all templates for adding evidence	<b>EQA Plans</b> List External Verification Plans

Begin by selecting the green **ADD TEMPLATE** button present on this page.

The screenshot shows the 'Templates' management page. It includes a header with a calendar icon and the title 'Templates'. A green '+ ADD TEMPLATE' button is located in the top right corner. Below the header is a 'Filters' section with three dropdown menus: 'All Plans', 'Select Unit', and 'All Evidence'. An 'UPDATE' button is positioned to the right of these filters. The 'Results' section at the bottom features a table with the following columns: Template Title, Evidence Type, Units, Owner, and Actions. The first row of the table shows the number '101' under Template Title, 'Generic' under Evidence Type, '1' under Units, and 'Institution' under Owner.

Please begin to populate the fields on this template using the following guidance.

The screenshot displays the 'Add Template' form. At the top right, there are 'Qualifications' and 'UPDATE' buttons. The form is divided into a 'Details' section. The 'Title' field is highlighted with an orange box, and a callout box points to it with the text: **Title** – of the template that will show within the list of templates for identification purposes. Other fields in the form include 'Owner' (Institution), 'Evidence Type' (Generic), 'Linked Evidence Template' (-), 'Traffic Light' (-), and 'Group' (Available to all).

**Default title** – this shows within the portfolio when viewing the template.

Default Evidence Type

Default Status

Default Title

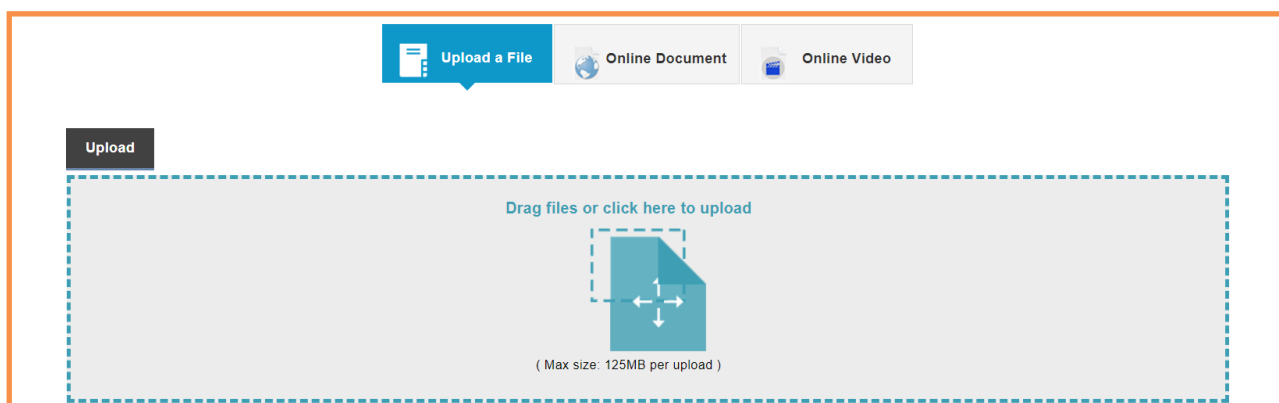
Default Details

Information for Teachers

**Default details** – this is where you will specify the task itself e.g.: ‘record yourself dealing with a phone call and attach the recording to evidence’.

**Information for Tutors** – this is where you will specify any data the tutor making this needs to be aware of e.g.: don’t accept evidence if the text isn’t in red’.

**Drag files or click here to upload** - Drag files or select here to upload - use where applicable to add files.



Upload a File | Online Document | Online Video

Upload

Drag files or click here to upload

( Max size: 125MB per upload )

Select at the very minimum the applicable units using the blue drop down in relation to the qualification icon located at the bottom of page. Here you will be able to tick the box of the relevant unit and select **update**. You will map it to the criteria once you have selected update in the same fashion as before.

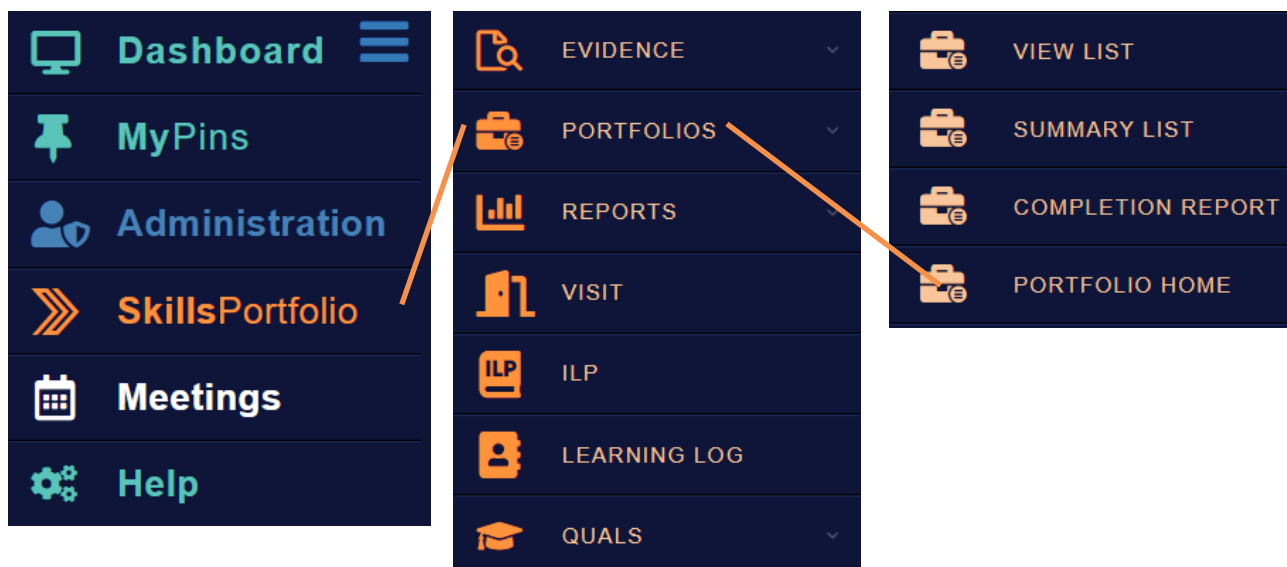
The screenshot shows a web interface titled "Qualifications". At the top, there is a header "Unassigned Qualifications" with a blue upward arrow icon. Below this, a list of qualifications is displayed. The first qualification is "Customer Service Standard", which is expanded to show "Customer Service Practitioner". Underneath, there is a checkbox labeled "End Point Assessment" which is currently unchecked. Below this, a list of qualification types is shown with blue downward arrow icons: "Diploma", "VTCT Level 2 NVQ Diploma in Hairdressing (QCF)", "Functional Skills", "NVQ", "Standard", "Technical Certificate", and "Other". At the bottom of the interface, there is a "Back To Top" button on the left and "UPDATE" and "CANCEL" buttons on the right. The "UPDATE" button is green with a checkmark, and the "CANCEL" button is red with an 'X'.

**All other fields are not mandatory.**

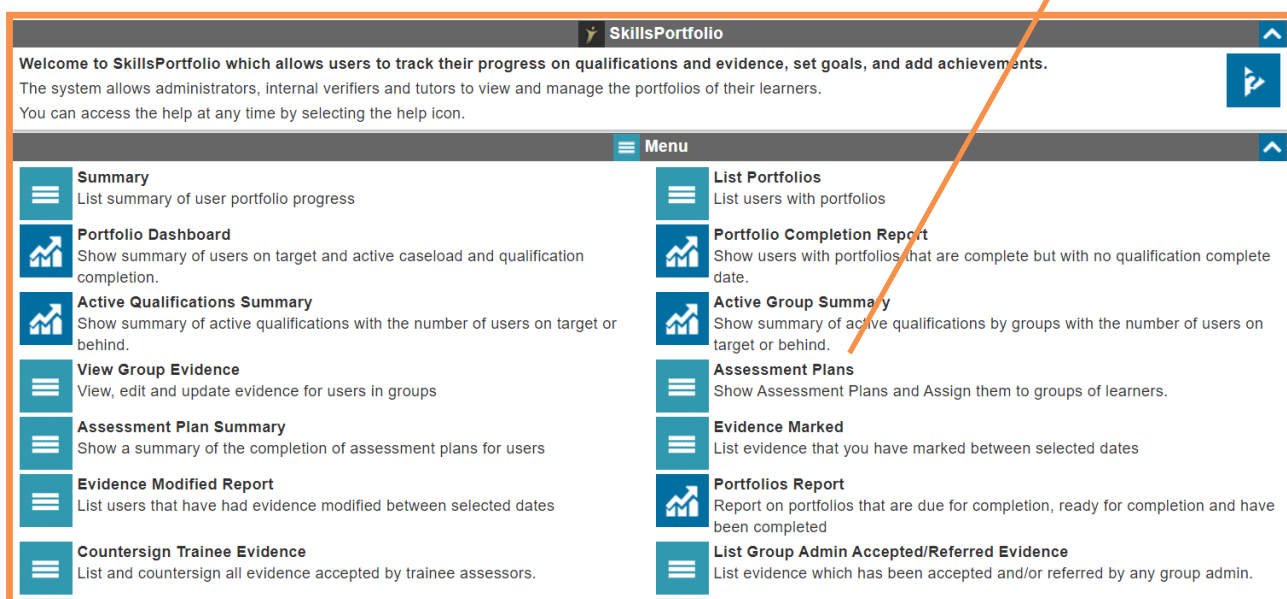
**Repeat this process for each template as required until you have mapped relevant parts of the qualification.**

# Linking Templates to Assessment Plans

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio > Portfolios > Portfolio Home**.



From portfolio home you will be able to click the icon **'Assessment Plans'**.



From this page you can see any existing Assessment Plans, if you wish to add a new one then select the green **ASSESSMENT PLAN** button.

Assessment Plans						+ ASSESSMENT PLAN
Title	Friendly Title	Reference	Templates	Valid From	Valid To	Actions
Automotive LV	Automotive LV	--	3	--	--	EDIT PLAN
Azesta	Azesta	--	3	--	--	EDIT PLAN
Customer Service	Customer Service	--	9	--	--	EDIT PLAN
H&S	H&S	--	1	--	--	EDIT PLAN
Need	Need	--	2	01/07/2018	16/06/2019	EDIT PLAN
Prem Dem	Prem Dem	--	4	--	--	EDIT PLAN
SeaRegs	SeaRegs	--	2	03/09/2018	31/08/2020	EDIT PLAN
testing	testing	--	0	--	--	EDIT PLAN
Total Training	Total Training	--	1	--	--	EDIT PLAN

Please begin to populate the fields on this template using the following guidance.

Title

**Title** - relevant to the qualification/plan you're creating.

Friendly Title

**Friendly title** – shows within the portfolio.

Plan reference

**Plan reference** - to add your internal reference to the plan where applicable for ease of identification

Valid From

Valid To

Add Template

**Add template** – select the template you wish to add from the existing templates you've already created then select update.

Add Linked Assessment Plan

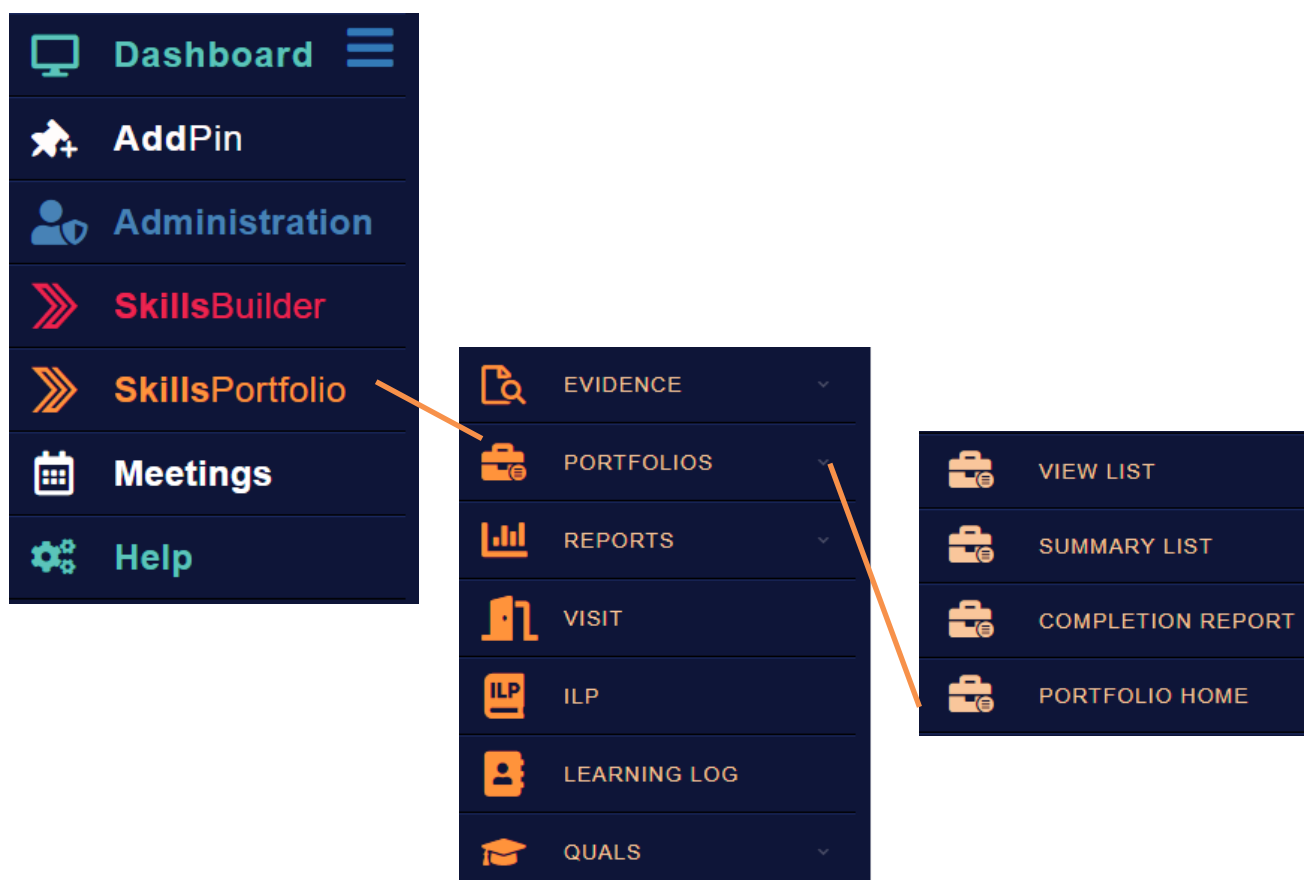
Repeat the previous step until all templates are present in the plan in the order you would expect. Edit the sequence as desired

Select **update** to finish the build of the assessment plan.

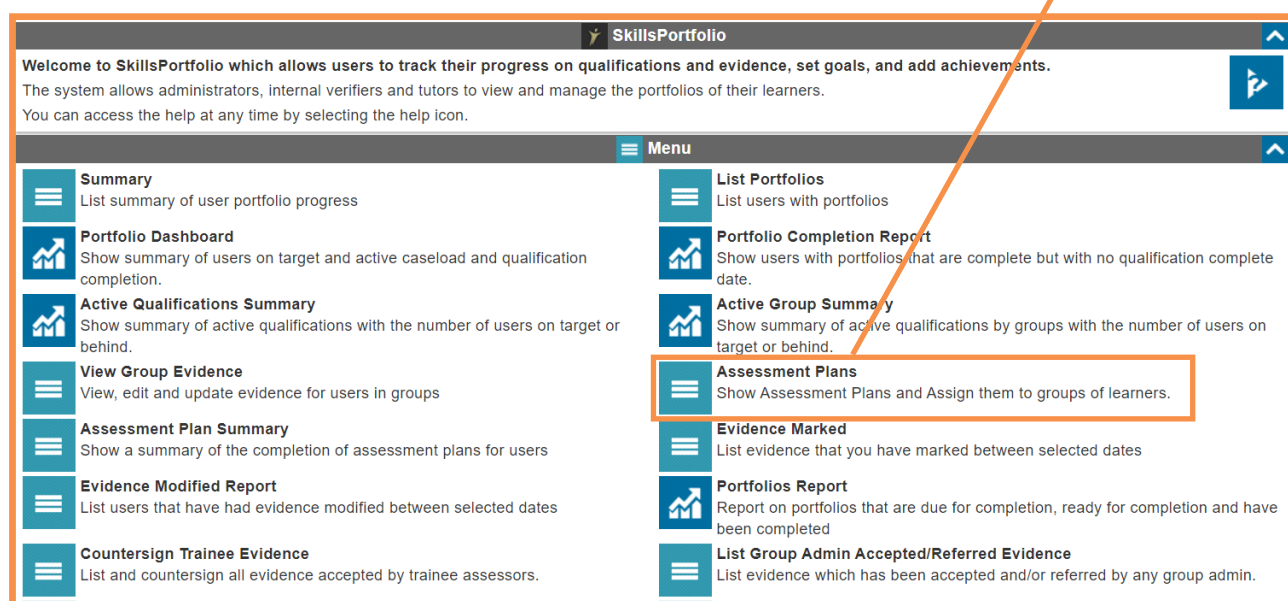


# Assign an Assessment Plan

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From portfolio home you will be able to click the icon **'Assessment Plans'**.



Here will be a list of all assessment plans you have created. Select the **dropdown** next appropriate plan and select **Assign Plan**.

The screenshot shows a table titled 'Assessment Plans' with columns: Title, Friendly Title, Reference, Templates, Valid From, Valid To, and Actions. The table lists several plans like 'Automotive LV', 'Azesta', 'Customer Service', etc. A callout box highlights the 'Assign Plan' button in the 'Actions' column for the 'Total Training' row. The callout box also shows other buttons: 'EDIT PLAN', 'SUMMARY', 'DELETE PLAN', and 'STRUCTURE'.

Title	Friendly Title	Reference	Templates	Valid From	Valid To	Actions
Automotive LV	Automotive LV	--	3	--	--	[EDIT PLAN] [Assign Plan]
Azesta	Azesta	--	3	--	--	[EDIT PLAN] [Assign Plan]
Customer Service	Customer Service	--	9	--	--	[EDIT PLAN] [Assign Plan]
H&S	H&S	--	1	--	--	[EDIT PLAN] [Assign Plan]
Need	Need	--	2	01/07/2018	16/06/2019	[EDIT PLAN] [Assign Plan]
Prem Dem	Prem Dem	--	4	--	--	[EDIT PLAN] [Assign Plan]
SeaRegs	SeaRegs	--	2	03/09/2018	31/08/2020	[EDIT PLAN] [Assign Plan]
testing	testing	--	0	--	--	[EDIT PLAN] [Assign Plan]
Total Training	Total Training	--	1	--	--	[EDIT PLAN] [Assign Plan]

Here you will be able to **select a group of users** to assign the plan too.

The screenshot shows the 'Assign Assessment Plan' form. It includes fields for 'Group' (set to 'Portfolio Group'), 'Users' (checked, showing '8 Students'), 'Assign All' (checkbox), 'Target Start' (set to 'XXX days before target'), and 'Automatic Target Range' (From/To fields). A callout box highlights the 'Group' dropdown menu.

Select **update** to finalise the assign of an assessment plan.



Be aware of the fact, adding new users to the group will not assign them to the plan you will need to repeat these steps.



# IQA Sampling Plan

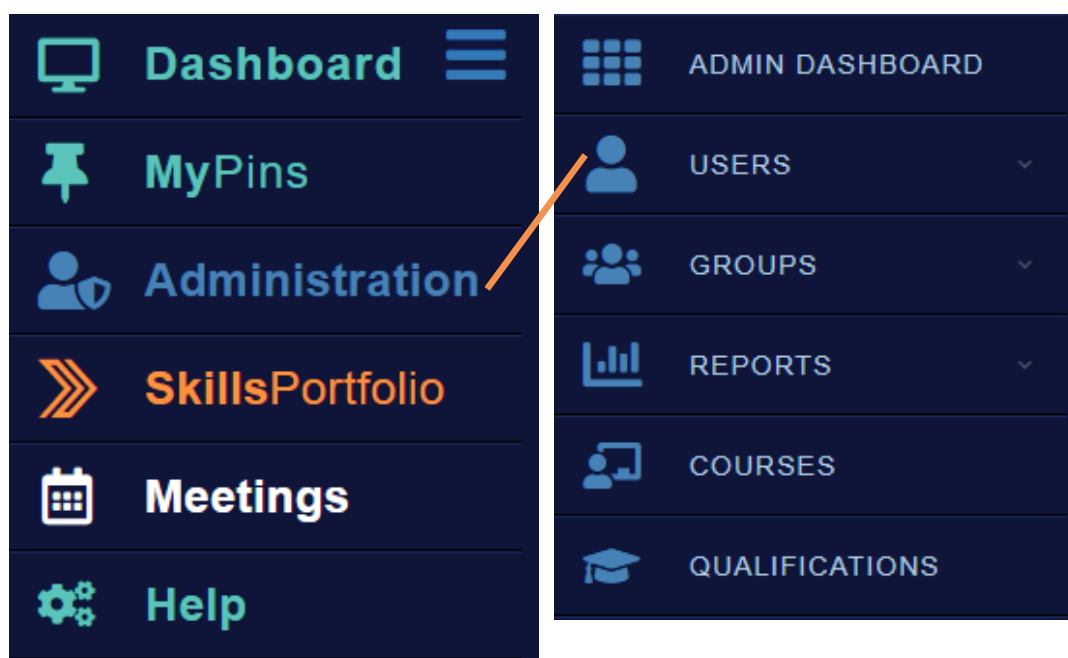
## What is an IQA Sampling plan?

This feature allows evidence that has been accepted by assessors/tutors to be verified or IQA referred by an internal verifier.

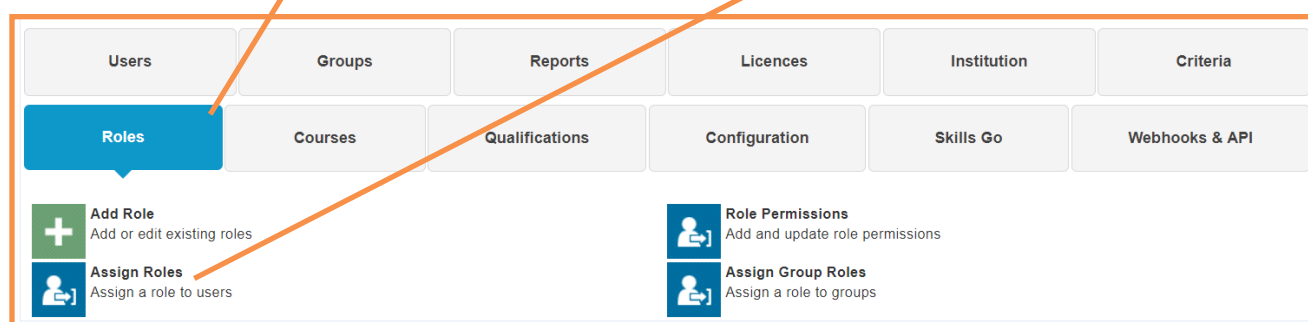
## Assign User IQA Role/Permissions

From home page select the **Administration** tab in the tool bar located on the left hand side of the page

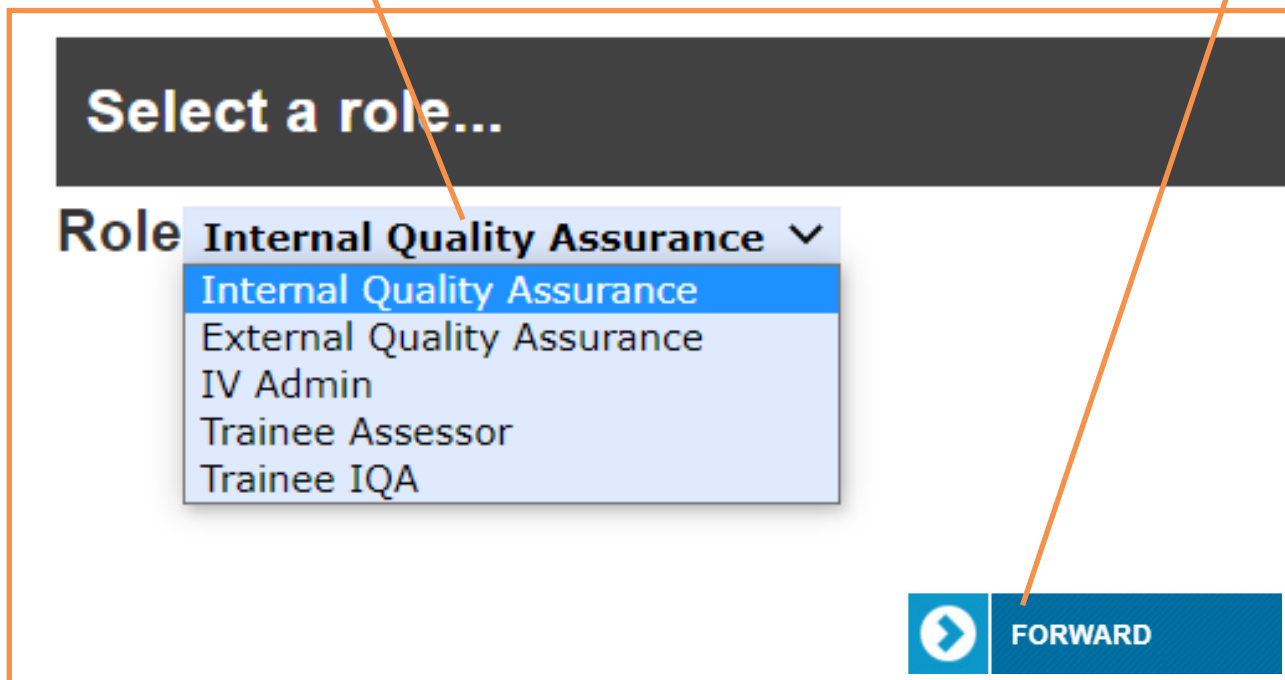
Select **Admin Dashboard**



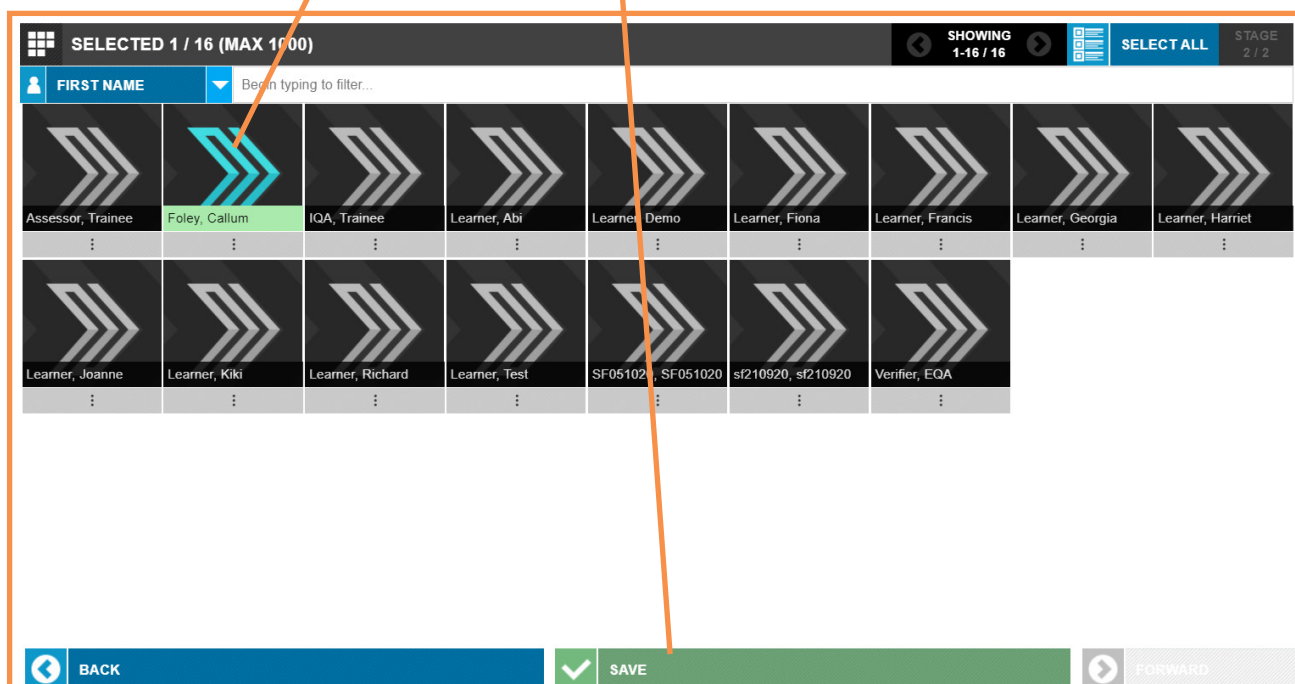
Select the **Roles section** > Select the **Assign Roles icon**



Select **Internal Quality Assurance** from the dropdown list, then select **Forward**

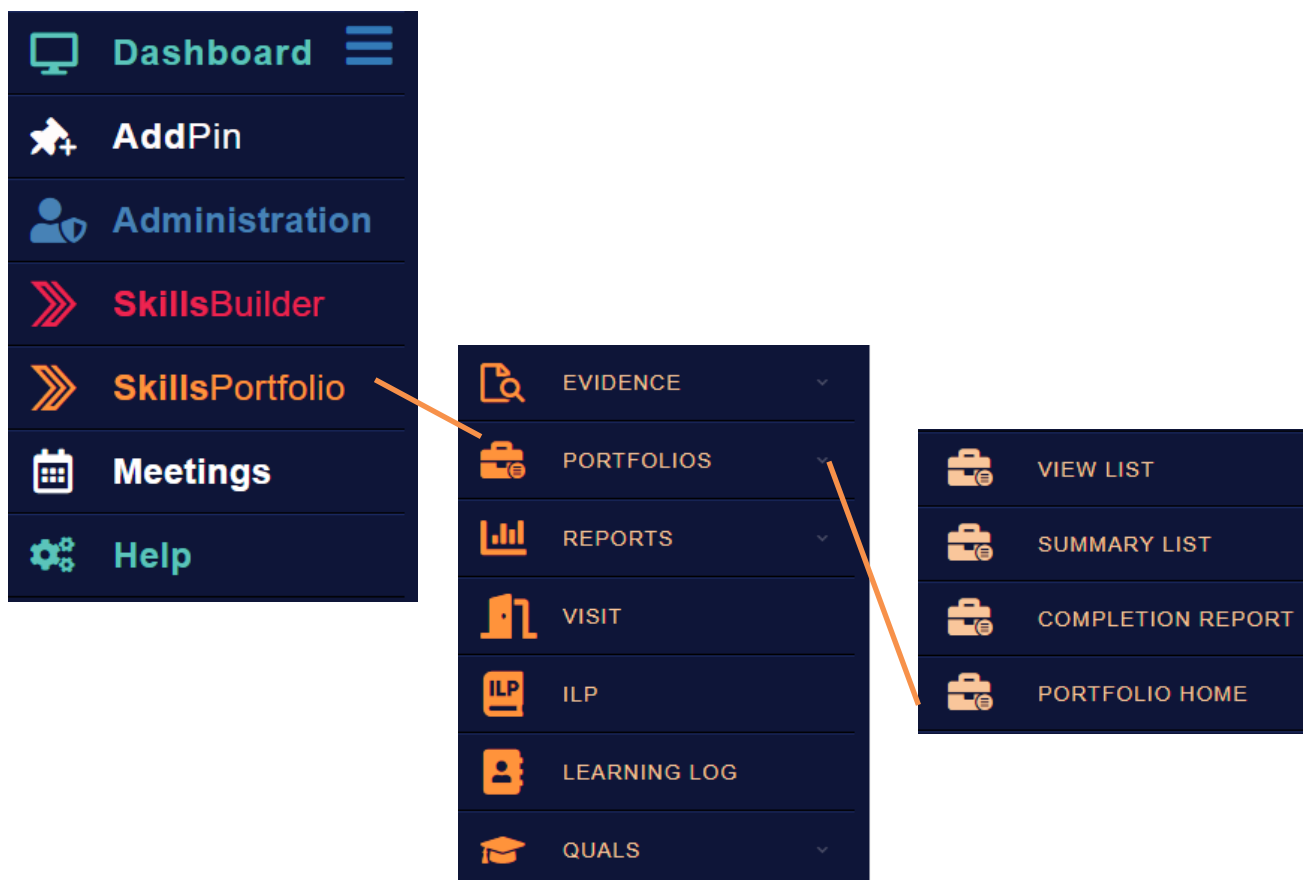


Select your **chosen user** and select **save**.

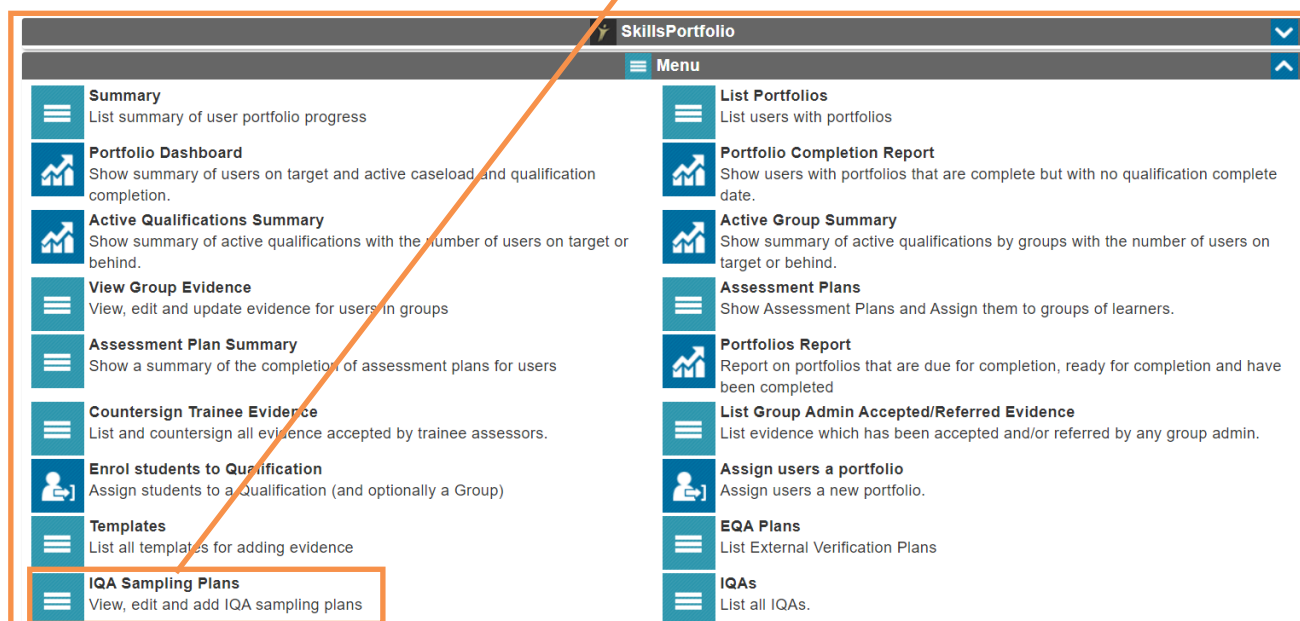


# Create an IQA Plan

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From this page select the **IQA sampling plans** option



## Select **Add Sampling plan**

Add the IQA to this plan by selecting their profile from the **drop down**. If their profile isn't present in the drop down they have not been assigned the role of IQA.

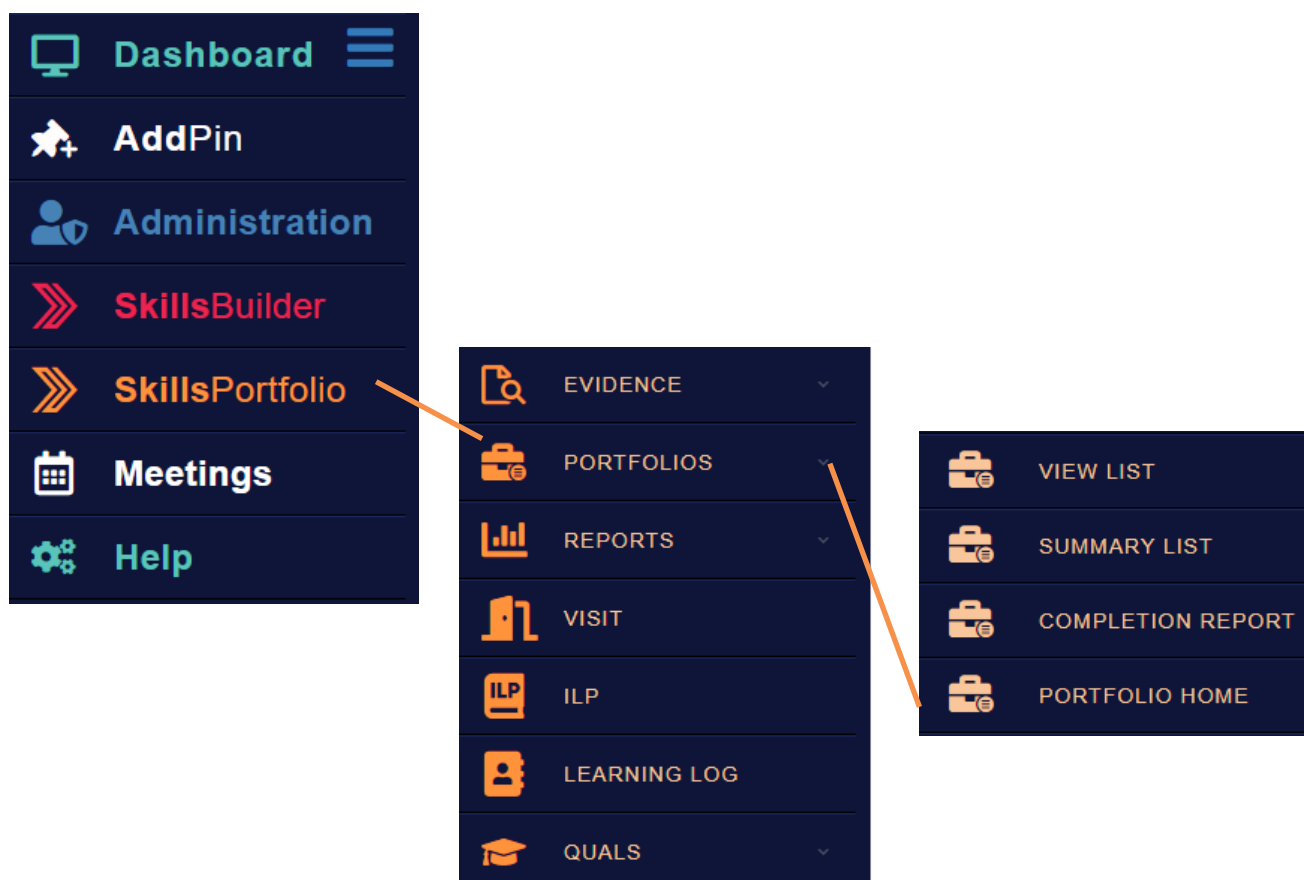
- **Specify the start and end date** the IQA plan will be available for
- **Specify the evidence assessed** to and evidence assessed from.
- **You may select a period** if you wish. The plan will be broken down into the number of periods selected, allowing you to view what evidence was IQA'd in which period.
- **Select a plan repetition** if required. This can be used instead of a longer plan with multiple periods.

Select **update** in order to finalise the creation of the plan. Be aware this is not the final step in the process you must now configure the plan.

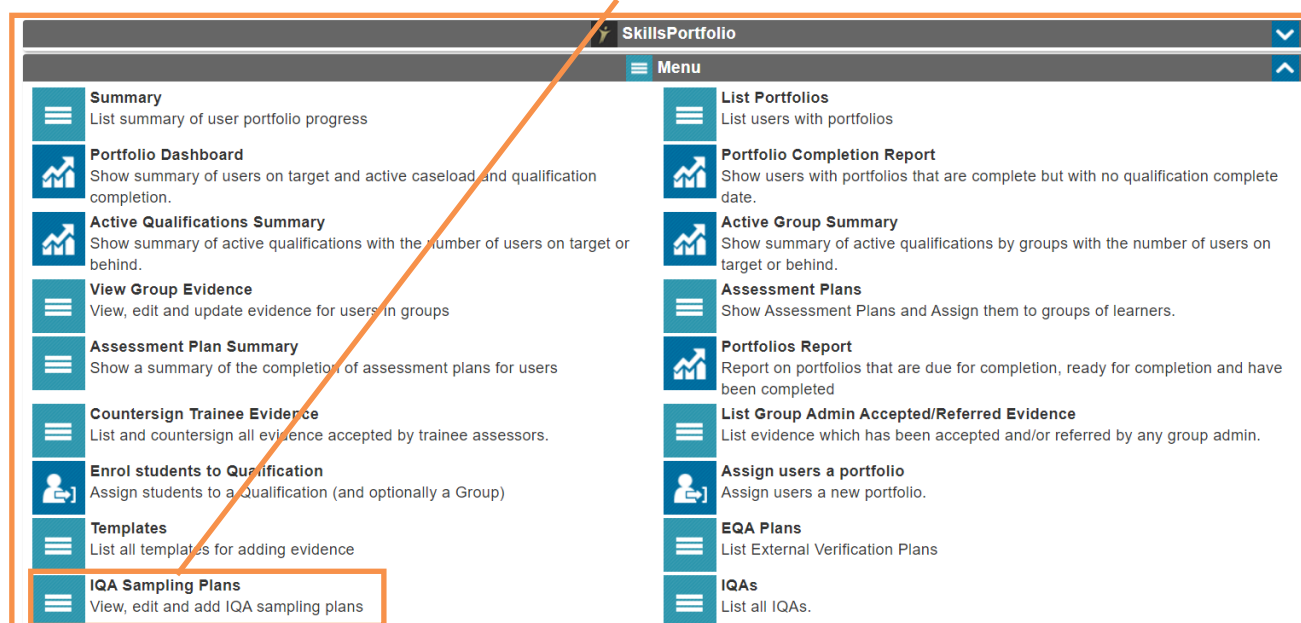
<b>Add IQA</b>	Add Verifier	▼ *
<b>IQA Start Date</b>	14/10/2020	*
<b>IQA Finish Date</b>	20/10/2020	*
<b>Evidence Assessed From</b>	19/10/2020	*
<b>Evidence Assessed To</b>	21/10/2020	*
<b>Add Periods</b>	4	▼
<b>Plan Repetition</b>	Monthly	▼ *
		✓ UPDATE

# Configure an IQA Sampling plan

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio** > **Portfolios** > **Portfolio Home**.



From this page select the **IQA sampling plans** option



Here you will be able to see all open IQA plans. Select the **drop down** that relates to the '**View IQA**' button you are to configure. Select **Configure**.

IQA Sampling Plans

Filters

Results

IQA	Evidence Period	IQA Period	Sampling Periods	Plan Checks	Completion (%)	Actions
<input checked="" type="checkbox"/> Tutor, Tina Tutor, Tina	14/10/2020 - 14/10/2020	14/10/2020 - 14/10/2020	1			<ul style="list-style-type: none"> <li>VIEW IQA</li> <li>OVERVIEW</li> <li>EDIT IQA</li> <li>CONFIGURE</li> <li>DELETE</li> </ul>

On this page select the '**Add items to plan**' button.

Configure IQA Sampling Plan - (14/10/2020 to 14/10/2020) + ADD ITEMS TO PLAN

Depending on the nature of the plan, select an **assessor/qualification** or **group**.

Select Item to Add to Plan

**Assessor**  
Select an assessor and percentage of assessed evidence

**Assessor/Qualification**  
Select an assessor and percentage of assessed evidence for a particular qualification

**Group**  
Select a group and percentage of assessed evidence

Depending on the tab you have selected you will be able to specify a **percentage** of evidence assessed to be displayed within the plan.

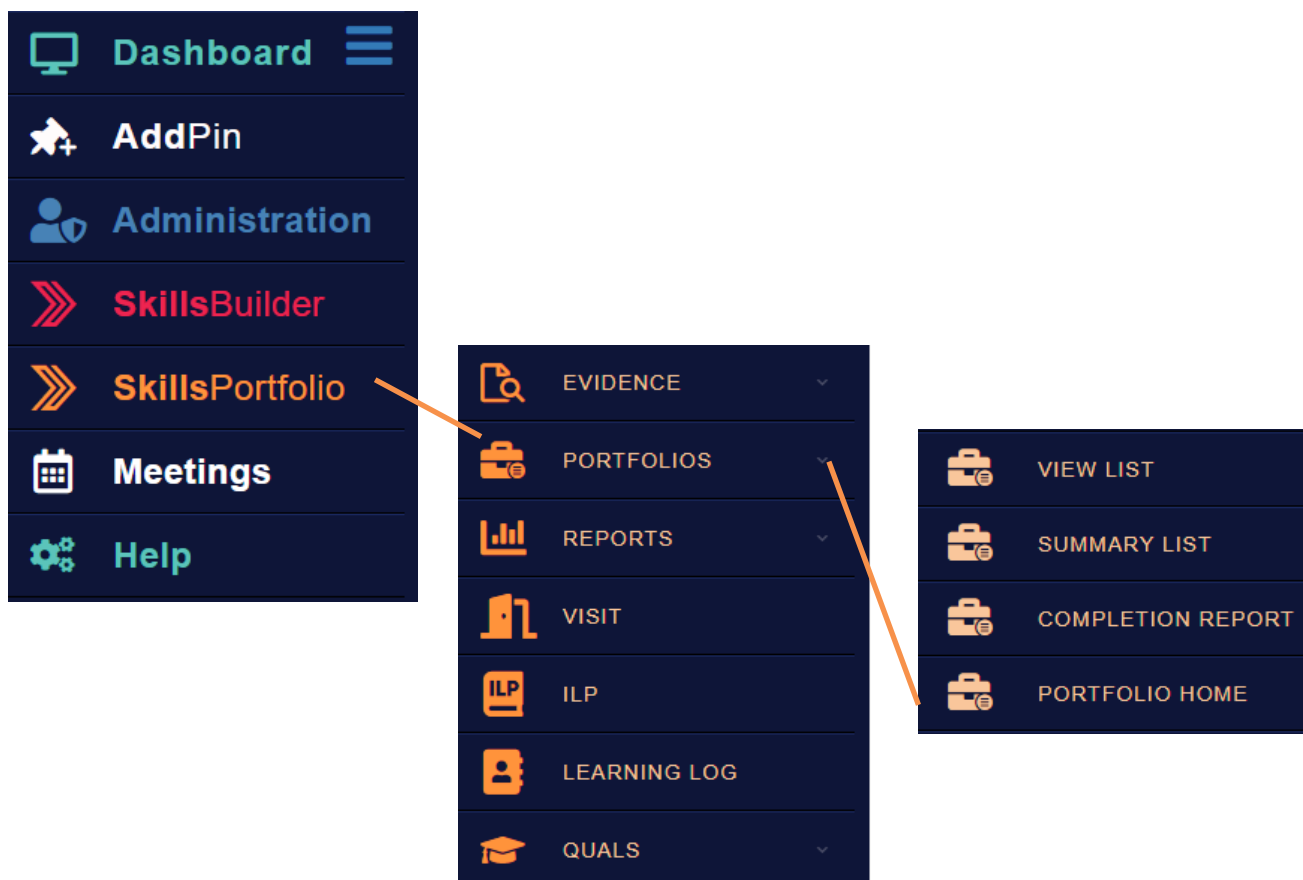
Assessor	Number of Items Assessed	Amount to Check
Admin, Amber	27	<input type="text"/> %
Assessor, Trainee	2	<input type="text"/> %

SAVE CANCEL

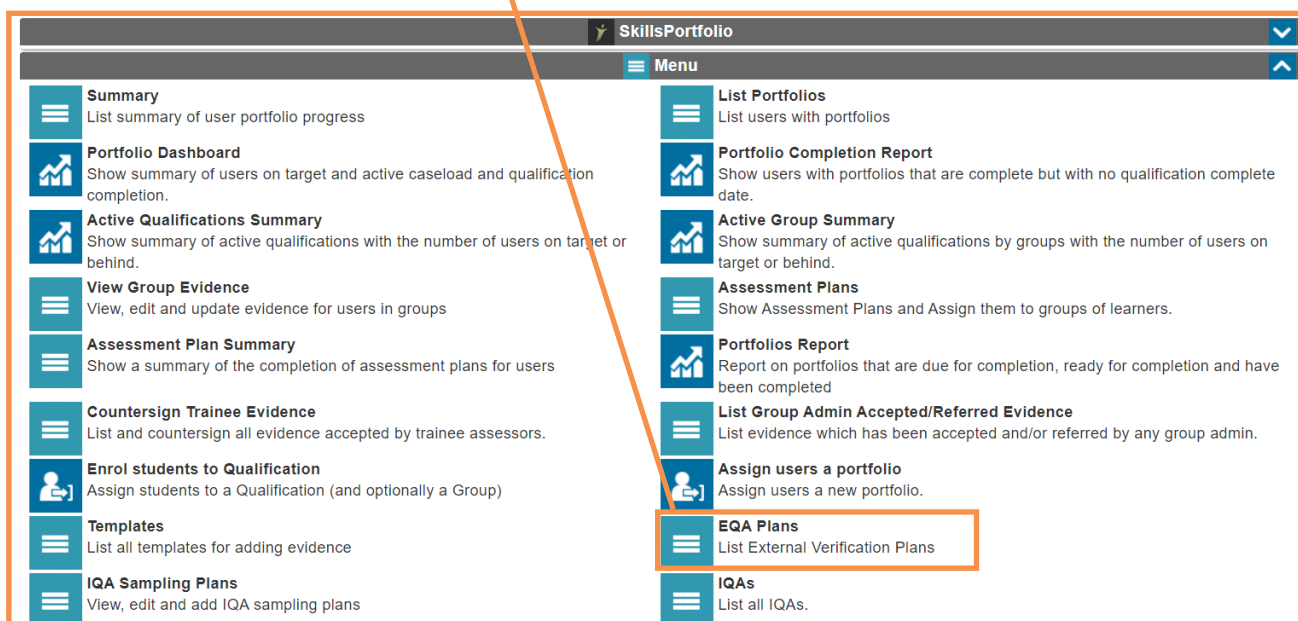
Repeat this process until the plan configuration is complete. Select **save** in order to finalise your changes.

# Add Items to an EQA Plan

From the home page, click the portfolio button that appears on the side tool bar, Proceed to select **Skills Portfolio > Portfolios > Portfolio Home**.



From this page select the **EQA Plans** option





# Assign Verifiers to EQA Plans

Here you will be able to see all open EQA plans  
 Select the **dropdown** that relates to the 'View EQA' button you are to add items and select **Assign Verifiers** from the list.

The screenshot shows the 'EQA Plans' interface. At the top right is a green '+ ADD EQA SESSION' button. Below it are 'Filters' and 'Results' sections. The 'Results' section contains a table with the following columns: Title, Verifiers, Users, Qualifications, Comments, Start Date, End Date, and Actions. The table lists several EQA plans, including 'EQA Demo Plan', 'eqa', 'Test 03/01/20', 'Plan 1', 'eqa session 101', 'eqa session 1', and 'yh'. For each plan, the 'Actions' column contains a 'VIEW EQA' button with a dropdown arrow. A dropdown menu is open for the 'VIEW EQA' button of the 'eqa' plan, showing options: 'ASSIGN VERIFIERS', 'ASSIGN GROUPS', 'ASSIGN QUALS', 'EDIT EQA SESSION', and 'DELETE'. An orange arrow points from the text above to the 'ASSIGN VERIFIERS' option in the dropdown menu.

A window will popup allowing you to **highlight** your **chosen EQA** for the plan.  
 Be sure to select **save** in order to finalise your changes.

The screenshot shows a user selection popup window. At the top, it says 'SELECTED 1 / 18 (MAX 1000)'. Below this is a search bar with the text 'FIRST NAME' and a dropdown arrow, followed by the placeholder text 'Begin typing to filter...'. The main area of the popup is a grid of user cards. Each card has a chevron icon on the left and the user's name on the right. The card for 'Assessor, Trainee' is highlighted with a green border and a green chevron icon. An orange arrow points from the text above to this highlighted card. At the bottom of the popup is a green bar with a white checkmark icon and the text 'SAVE'.



# Assign Groups to EQA Plans

Then from the same dropdown list, select **Assign Groups**; this will allow you to **assign a group** in which the EQA will be able to access on the plan.

EQA Plans
+ ADD EQA SESSION

Filters | v

Results | 1

Title	Verifiers	Users	Qualifications	Comments	Start Date	End Date	Actions
EQA Demo Plan	1	1 Group	All Qualifications	0	07/02/2017	01/02/2022	<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>
eqa	0	All Users	All Qualifications	0	18/10/2017	18/10/2017	<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>
Test 03/01/20	0	1 Group	9 Qualifications	0			<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>
Plan 1	0	All Users	All Qualifications	0			<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>
eqa session 101	1	All Users	All Qualifications	0			<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>
eqa session 1	1	1 Group	1 Qualification	0			<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>
yh	0	All Users	All Qualifications	0	17/09/2020	10/09/2021	<span style="background-color: #17a2b8; color: white; padding: 2px 5px;">VIEW EQA</span>

ASSIGN VERIFIERS
ASSIGN GROUPS

ASSIGN QUALS
EDIT EQA SESSION

DELETE

A window will popup allowing you to **assign** your **chosen Group** for the plan. Be sure to select **save** in order to finalise your changes.

SELECTED 1 / 5 (MAX 1000)
SHOWING 1-5 / 5
SELECT ALL

**GROUP TITLE** Begin typing to filter...

demo

group

Group 1

Group Name 001

Tutors

✓ SAVE

## Assign Qualifications to EQA Plans

If necessary repeat this step once more ensuring you select assign qualification; this will allow you to assign a qualification, which will allow the EQA to view all evidence submitted against it on the plan.

Once again from the same screen as previously, Select the **dropdown** that relates to the 'View EQA' button you are to add items and select **Assign Quals** from the list.

**EQA Plans** + ADD EQA SESSION

Filters ▼

Results 1

Title	Verifiers	Users	Qualifications	Comments	Start Date	End Date	Actions
EQA Demo Plan	1	1 Group	All Qualifications	0	07/02/2017	01/02/2022	VIEW EQA ▼
eqa	0	All Users	All Qualifications	0	18/10/2017	18/10/2017	VIEW EQA ▼
Test 03/01/20	0	1 Group	9 Qualifications	0			VIEW EQA ▼
Plan 1	0	All Users	All Qualifications	0			VIEW EQA ▼
eqa session 101	1	All Users	All Qualifications	0			VIEW EQA ▼
eqa session 1	1	1 Group	1 Qualification	0			VIEW EQA ▼
yh	0	All Users	All Qualifications	0	17/09/2020	10/09/2021	VIEW EQA ▼

Expanded Actions for 'eqa':

- ASSIGN VERIFIERS
- ASSIGN GROUPS
- ASSIGN QUALS**
- EDIT EQA SESSION
- DELETE

A window will popup allowing you to **assign** your **Qualifications** for the plan. Be sure to select **save** in order to finalise your changes.

SELECTED 1 / 18 (MAX 1000) SHOWING 1-18 / 18 SELECT ALL

QUALIFICATION

Active IQ Level 2 C... **Business Administr...** City & Guilds Level... Customer Service ... Customer Service ... ForSkills Automotiv... ForSkills Automotiv... Functional Skills Le... NCFE Level 2 Dipl...

The Care Certificat... VTCT Level 2 NVQ...

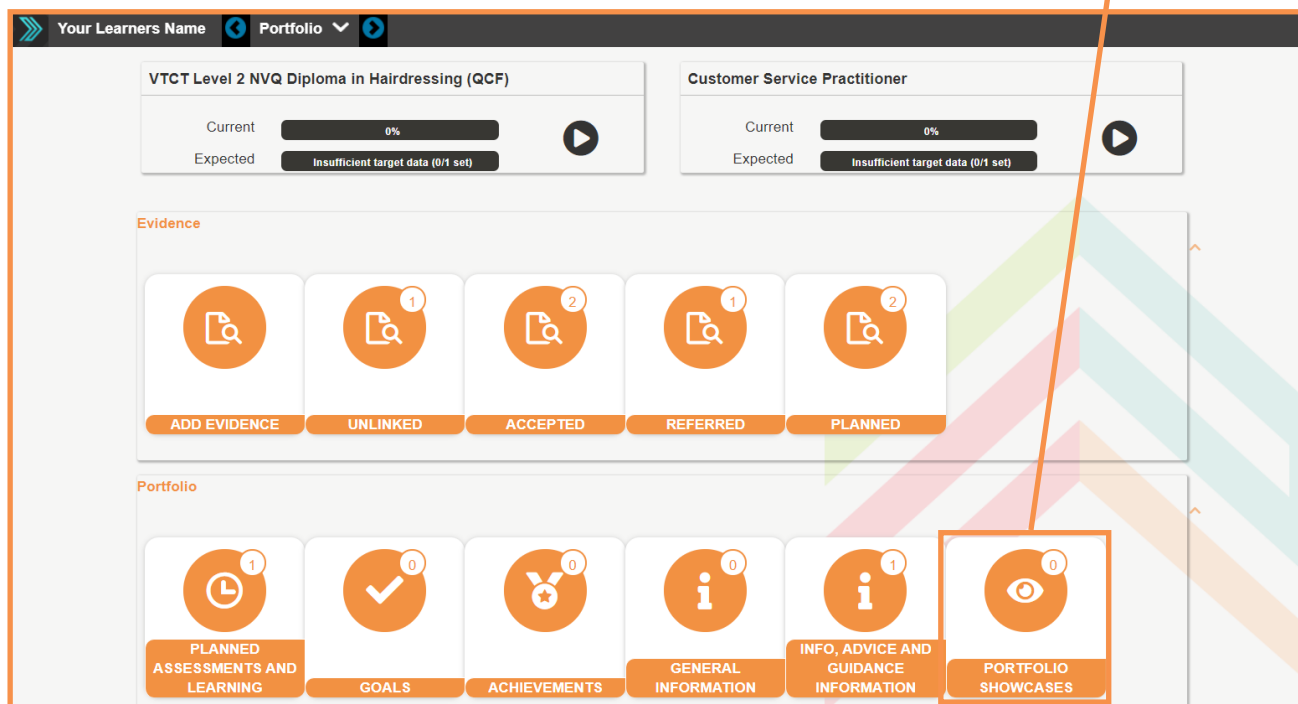
SAVE

**You have now successfully created this plan**

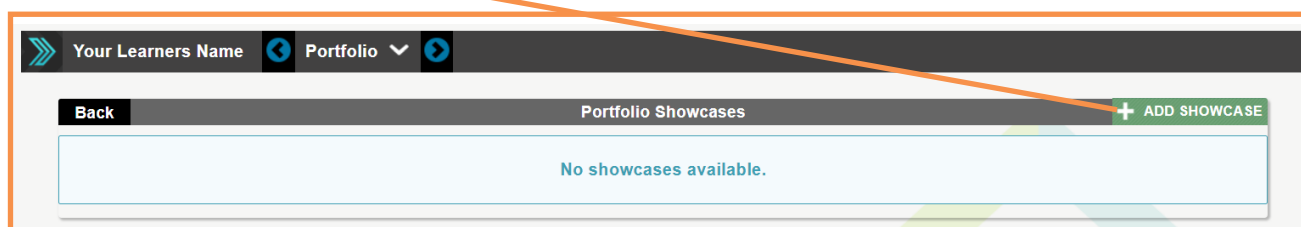
# Showcase

Using guidance from page 12 “**How to Navigate to your Learners Portfolio**” find your learners portfolio and open it.

From the bottom of your Learners Portfolio page select **Portfolio Showcases**.



Select **Add Showcase**.



Add a **title** and optional **details** for the showcase  
 Select **save**

Create Showcase

Showcase Title

Details 

Details of the Showcase can be added here.

[Back To Top](#)

Add evidence to the showcase via the green **Add Evidence** button.

List Showcase Evidence - Showcase 1

**This showcase does not have any evidence associated with it**

Select the **View Evidence** button that relates to the evidence you are aiming to add to the showcase.

List Showcase Evidence - Showcase 1

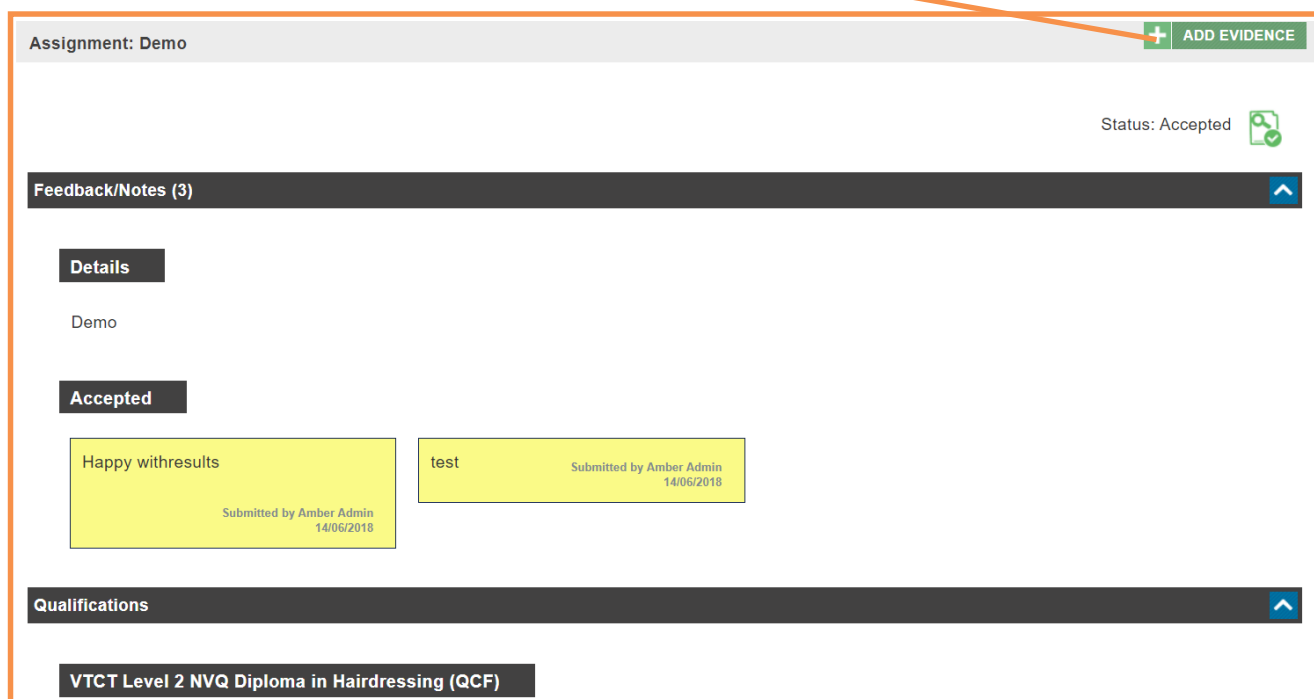
Evidence Not In Showcase

Filters | v |

Results | ^ |

Title	Evidence Type	Evidence Status	Last Updated	Actions
Need 2	Assignment	Planned	05/09/2018	<input type="button" value="VIEW EVIDENCE"/>
Demo	Assignment	Accepted	14/06/2018	<input type="button" value="VIEW EVIDENCE"/>
RPL	Recognition Of Prior Learning (RPL)	Accepted	05/09/2018	<input type="button" value="VIEW EVIDENCE"/>
group learning session	Assignment	Planned	29/05/2020	<input type="button" value="VIEW EVIDENCE"/>
Title of Evidence	Assignment	Referred	09/10/2020	<input type="button" value="VIEW EVIDENCE"/>

Proceed to select the green **Add Evidence** button to finalise the assign to the showcase.



The screenshot shows an assignment titled "Assignment: Demo" with a status of "Accepted". A green "ADD EVIDENCE" button is highlighted in the top right corner. Below the assignment title, there is a "Feedback/Notes (3)" section. Underneath, the "Details" section shows the assignment name "Demo". The "Accepted" section displays two evidence pieces: "Happy withresults" and "test", both submitted by Amber Admin on 14/06/2018. At the bottom, the "Qualifications" section lists "VTCT Level 2 NVQ Diploma in Hairdressing (QCF)".

Proceed to select the green **Add Evidence** button to finalise the assign to the showcase.

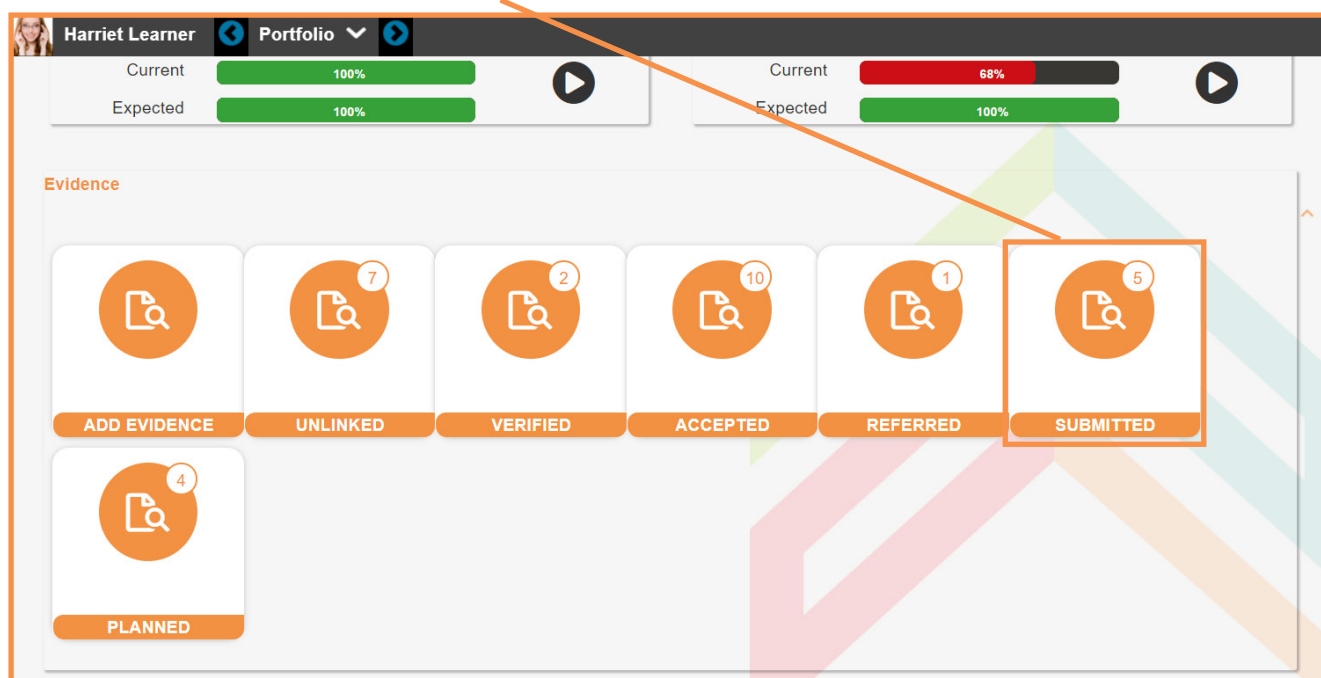
Repeat adding rest of evidence pieces until the showcase is complete.

## How to Delete Evidence

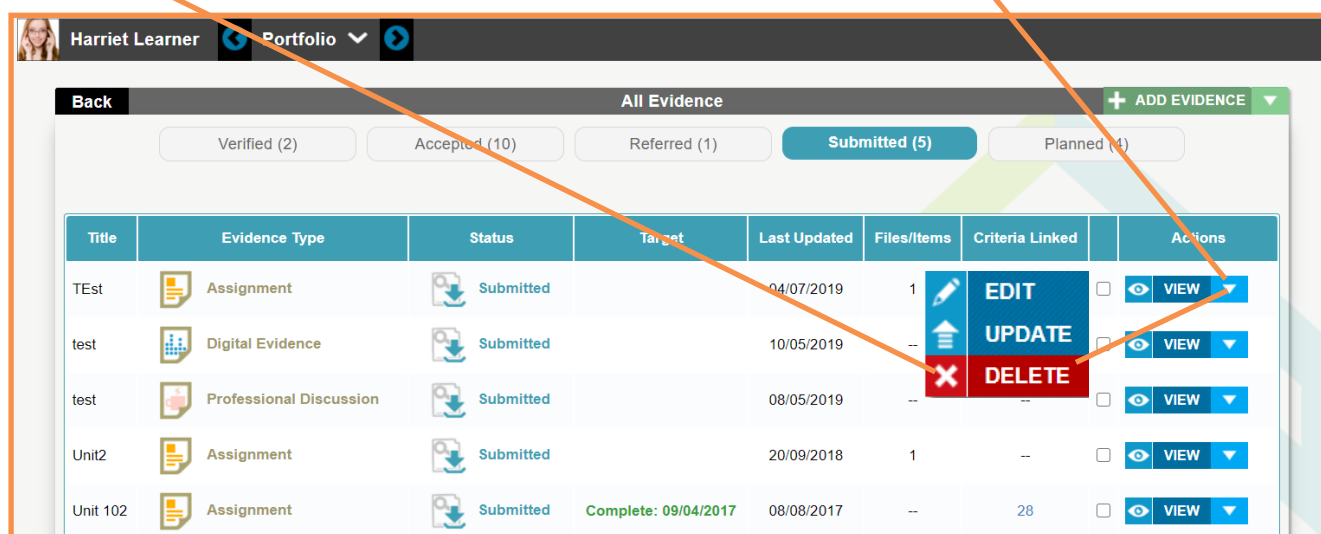
Note: Evidence **must be at the Submitted status** in order to be deleted. You **cannot delete planned or accepted evidence** without changing the status to 'submitted'.

Navigate to a learner's portfolio/profile following steps from Page 12.

Select the tile labelled '**Submitted**' under the Evidence section on the Portfolio.



Select the **drop down** located to the right of the **view button** that relates to the evidence you are aiming to delete.  
Select **delete** from the drop down list.

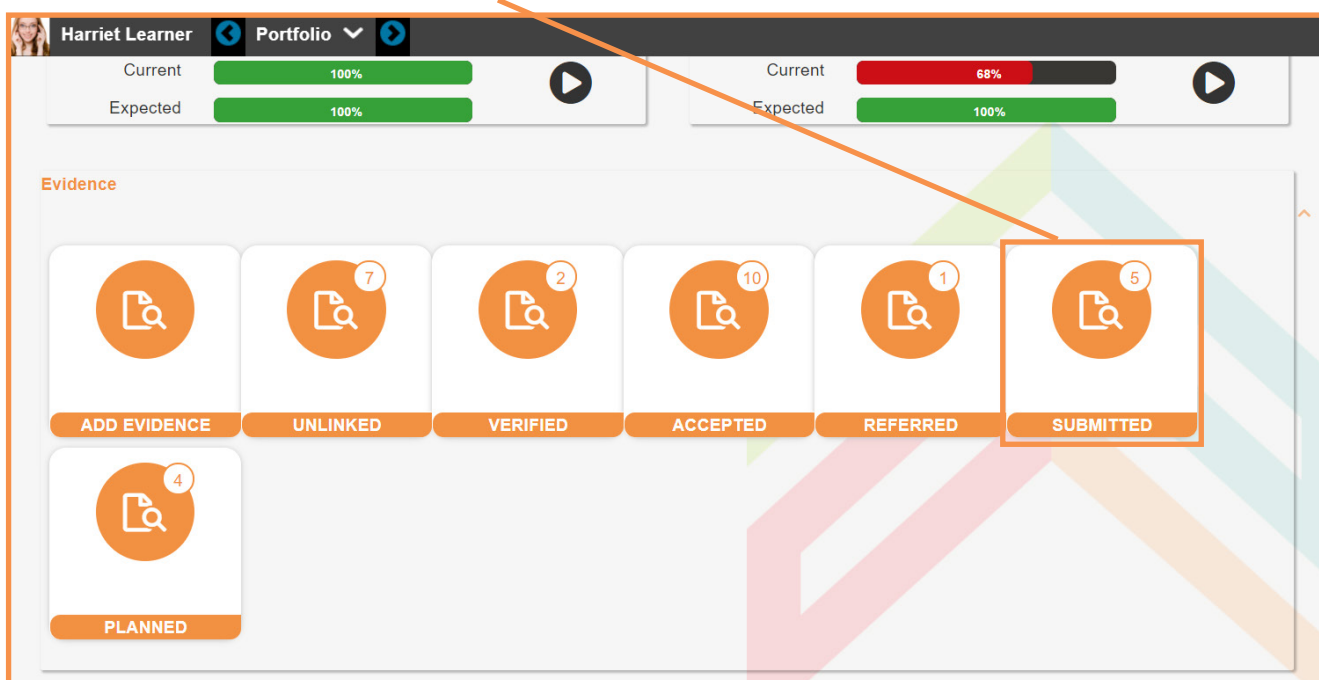


# How to Merge Evidence

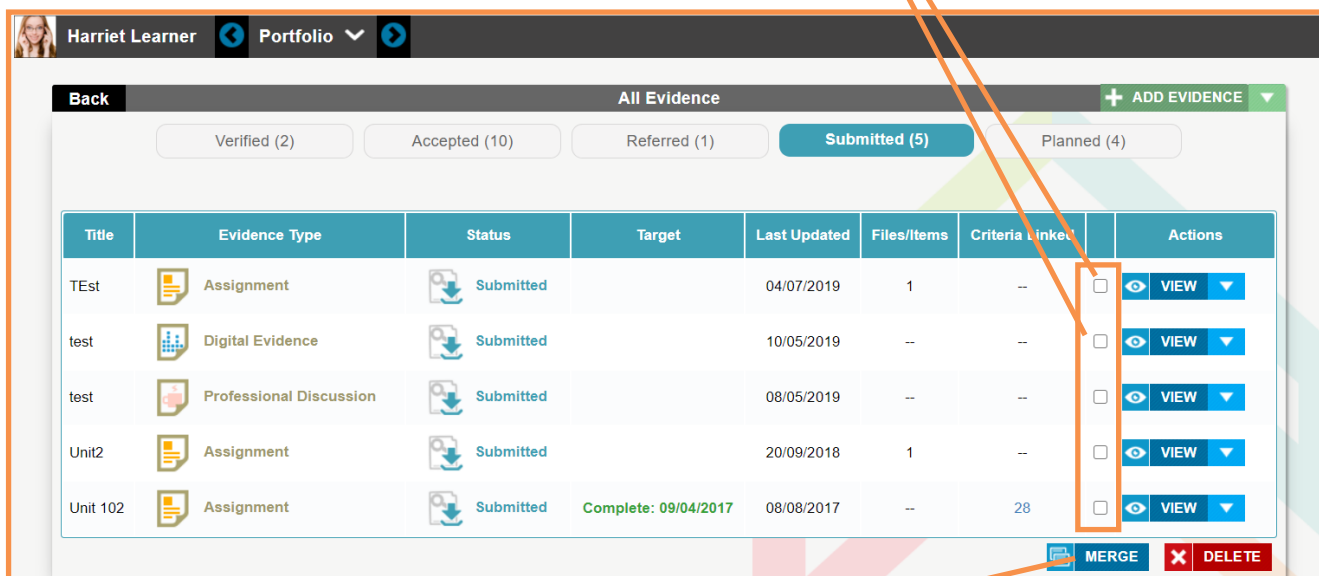
Note: Evidence **must be at the Submitted status** in order to be deleted. You **cannot delete planned or accepted evidence** without changing the status to 'submitted'.

Navigate to a learner's portfolio/profile following steps from Page 12.

Select the tile labelled '**Submitted**' under the Evidence section on the Portfolio.










You will notice a tick box relating to every unit **check the boxes** of evidence that is to be merged.



Scroll to the bottom of page and select **Merge**.

You will now be expected to **tick the circle** of the primary piece of evidence.

Merge Evidence						
Title	Evidence Type	Status	Criteria Linked	Last Updated	Primary	Actions
TEst	 assignment	 Submitted	0	04/07/2019	<input checked="" type="radio"/>	 VIEW
test	 digital_evidence	 Submitted	0	10/05/2019	<input type="radio"/>	 VIEW

 MERGE

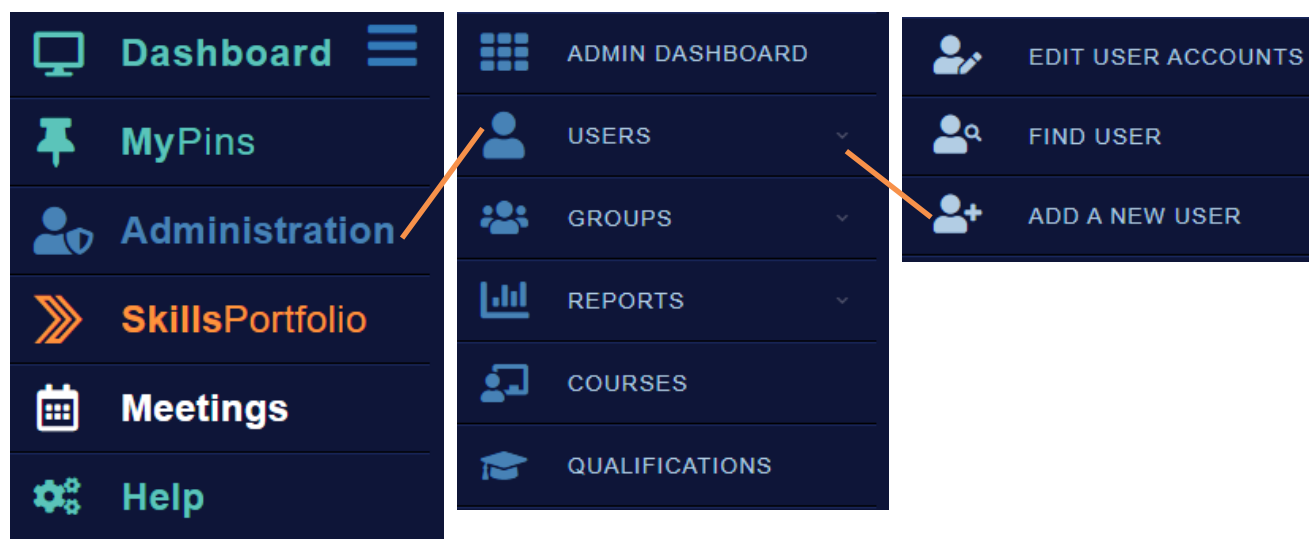
Select **Merge** to finalise the process.

## How to give an Employer Access to Learner Profiles

Adding an employer to the platform will give the external party view only access to a learner's portfolio and its progression.

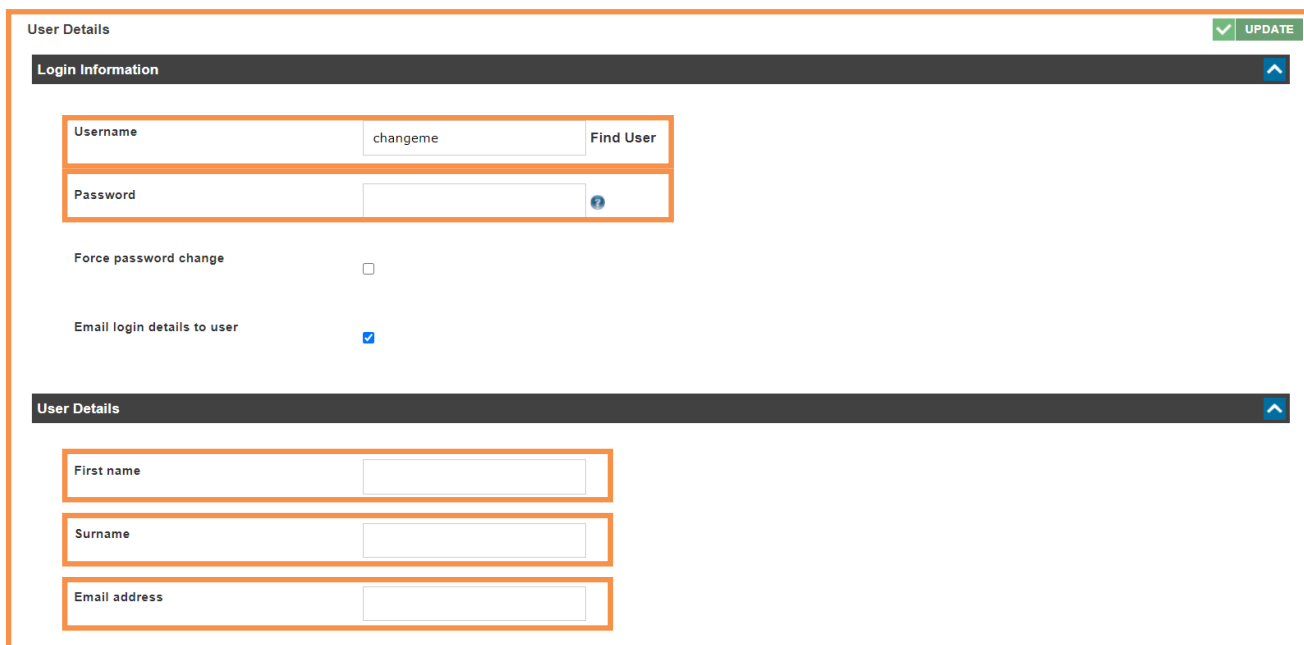
## Creating a Employer Profile

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **user's** icon > Select **add a new user**.





Next complete the mandatory fields:



The screenshot shows a 'User Details' form with two sections. The first section, 'Login Information', contains a 'Username' field with the value 'changeme', a 'Find User' button, a 'Password' field, a 'Force password change' checkbox (unchecked), and an 'Email login details to user' checkbox (checked). The second section, 'User Details', contains three empty text input fields for 'First name', 'Surname', and 'Email address'. A green 'UPDATE' button with a checkmark is visible in the top right corner of the form.

**Username** – create a username for your learner, there are no rules it just needs to be bespoke as no two usernames can be the same.

**Password** – if you know what the learners password is going to be populate this field accordingly, in the event you do not, use the temporary password of changeme.

**First name** – specify the first name of your learner.

**Surname** – specify the surname of your learner.

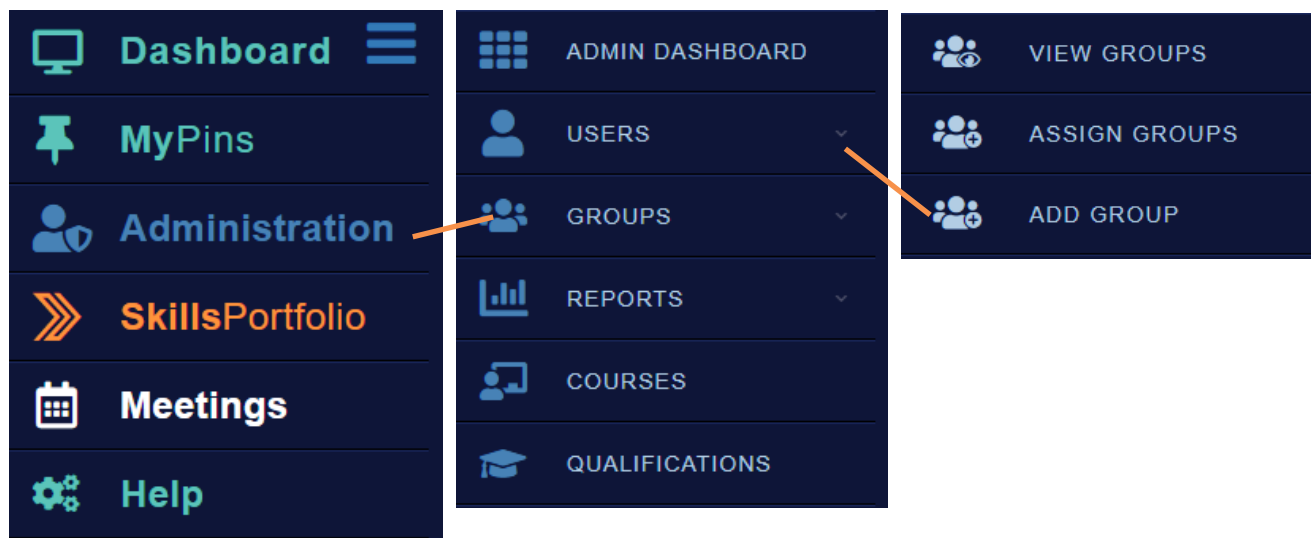
**Email address** – specify the email address of your learner if you have it.

Selecting the **Update** button to create the account we will send an automated email with log in instructions.

Select update to finalise the creation of this account. All that is left to do is create a group of learners for this employer to access.

# Create an Employers Group of Learners

From home page select the **Administration** tab in the tool bar located on the left hand side of the page > Proceed to select **group's** icon > Select **Add group**.



Proceed to give the group a **title**.

The image shows the 'Add Group' form interface. At the top, there's a 'Show All' button and a 'Group Details' dropdown. Below is a 'Group Details' section with several fields:
 

- Title:** A text input field with a red asterisk and a tooltip that says 'This is the title of the group.' This field is highlighted with an orange box.
- Reference:** A text input field with a tooltip 'Optional group reference.'
- Date Started:** A date picker field.
- Date Finished:** A date picker field.
- Parent:** A dropdown menu labeled 'Select Parent' with a tooltip 'If required select the group that is the parent of this group.'
- Group Type:** A dropdown menu with 'Default' selected. The dropdown is open, showing options: Default, Assessor, **Employer** (highlighted with an orange box), Enrolment, Enrolment - Global, LS Coach, Mentor, and Security.
- Add Child Users:** A section with a checkbox for 'Auto Assign Group Courses' and a tooltip 'Automatically assign courses linked to the Group to Tutors and Learners.'

You must set the Group Type as **Employer**. Select **update** to create the group.

## Select **Add Users**

**Testing**

Group
Edit Group
Edit Users
Group Notes

Group Files
Group Web Forms
Add Group To Web Form

Show All
Group Details
Sub Groups
Group Courses

Group Users

Group Details
COPY GROUP

Group Title: Testing
Group Type: Default

Sub Groups
+ ADD SUB GROUP

Group Courses
+ ADD COURSES

Group Users
+ ADD USERS

## Select the **Employer** you would like for this group. Select **Forward**

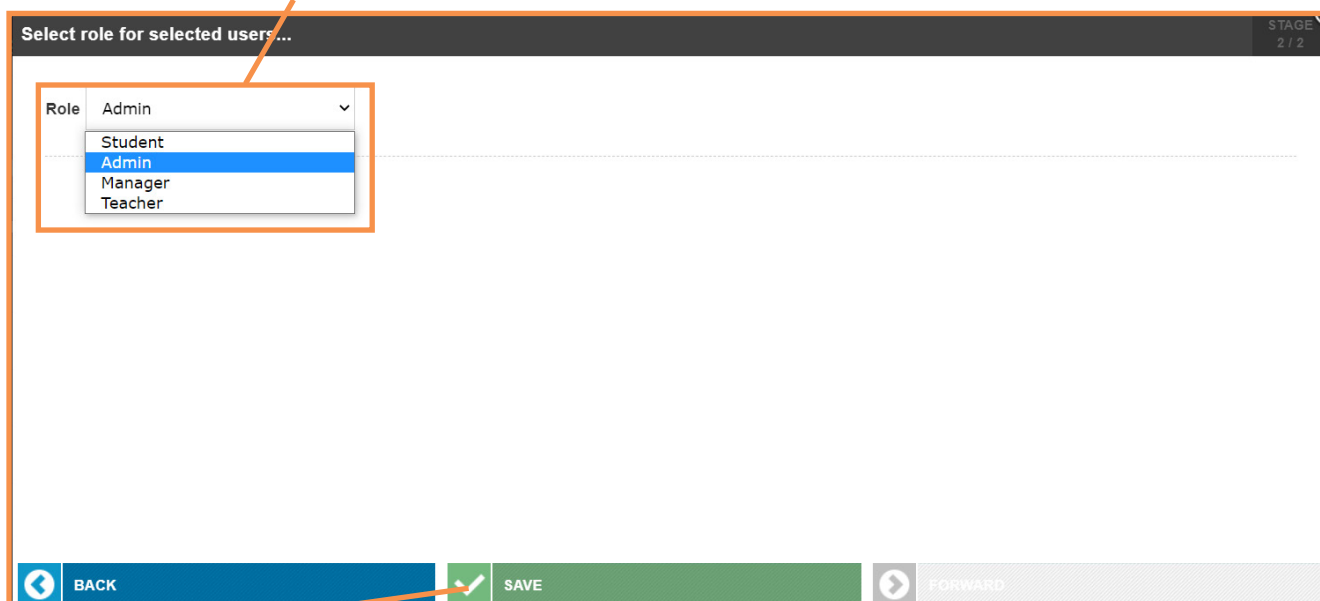
SELECTED 3 / 19 (MAX 1000)
SHOWING 1-19 / 19
SELECT ALL
STAGE 1 / 2

FIRST NAME

Admin, Amber	Assessor, Trainee	Foley, Callum	IQA, Trainee	Learner, Abi	Learner, Demo	Learner, Fiona	Learner, Francis	Learner, Georgia
Learner, Harriet	Learner, Joanne	Learner, Kiki	Learner, Richard	Learner, Test	Manager, Mandy	SF051020, SF0510...	sf210920, sf210920	Tutor, Tina
Verifier, EQA								

BACK
SAVE
FORWARD

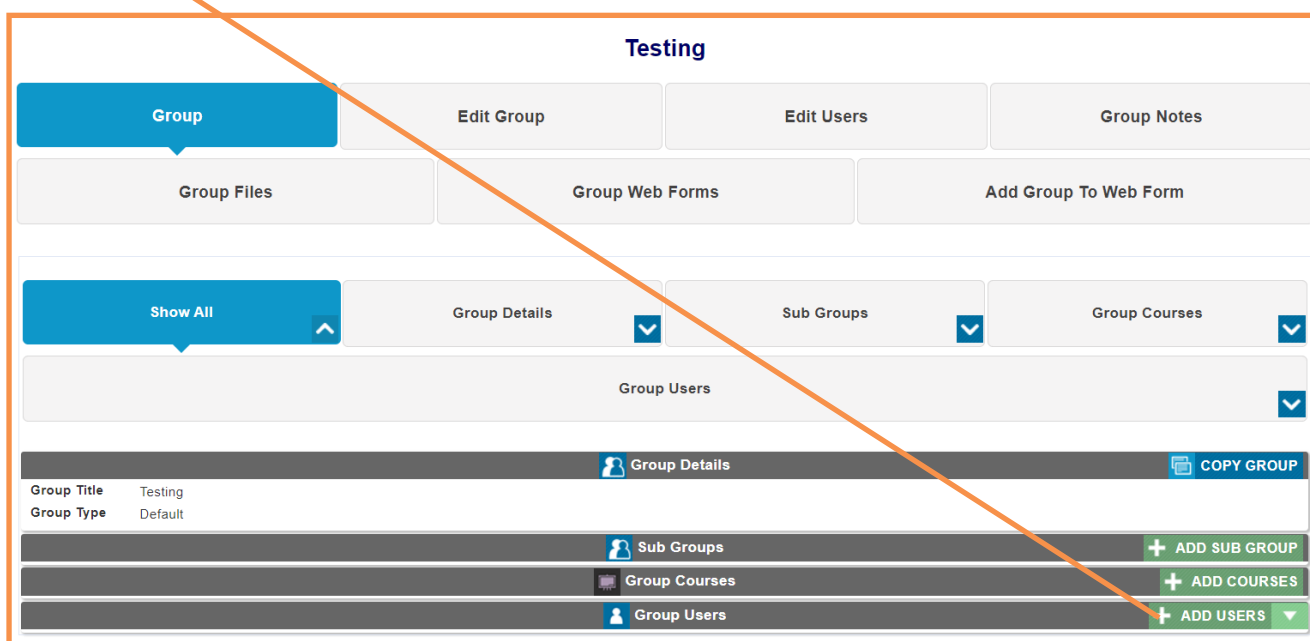
Select the **Manager role** from the dropdown.



The screenshot shows a web interface with a dark header bar containing the text "Select role for selected users..." and "STAGE 2 / 2". Below the header is a dropdown menu with the label "Role" and a current selection of "Admin". The dropdown list is open, showing the following options: "Student", "Admin" (highlighted in blue), "Manager", and "Teacher". At the bottom of the interface, there is a navigation bar with three buttons: "BACK" (with a left arrow), "SAVE" (with a checkmark icon), and "FORWARD" (with a right arrow). An orange arrow points from the text above to the "Manager" option in the dropdown. Another orange arrow points from the text below to the "SAVE" button.

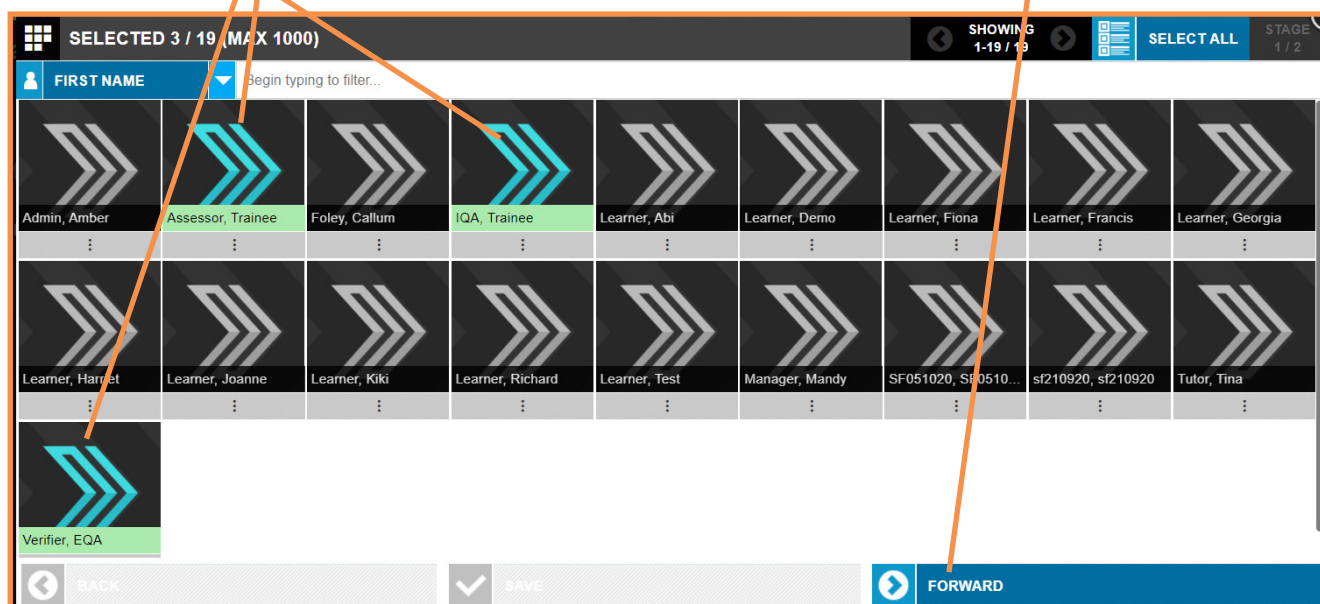
Select **Save** in order to assign an Employer to the group.

Select **Add Users**

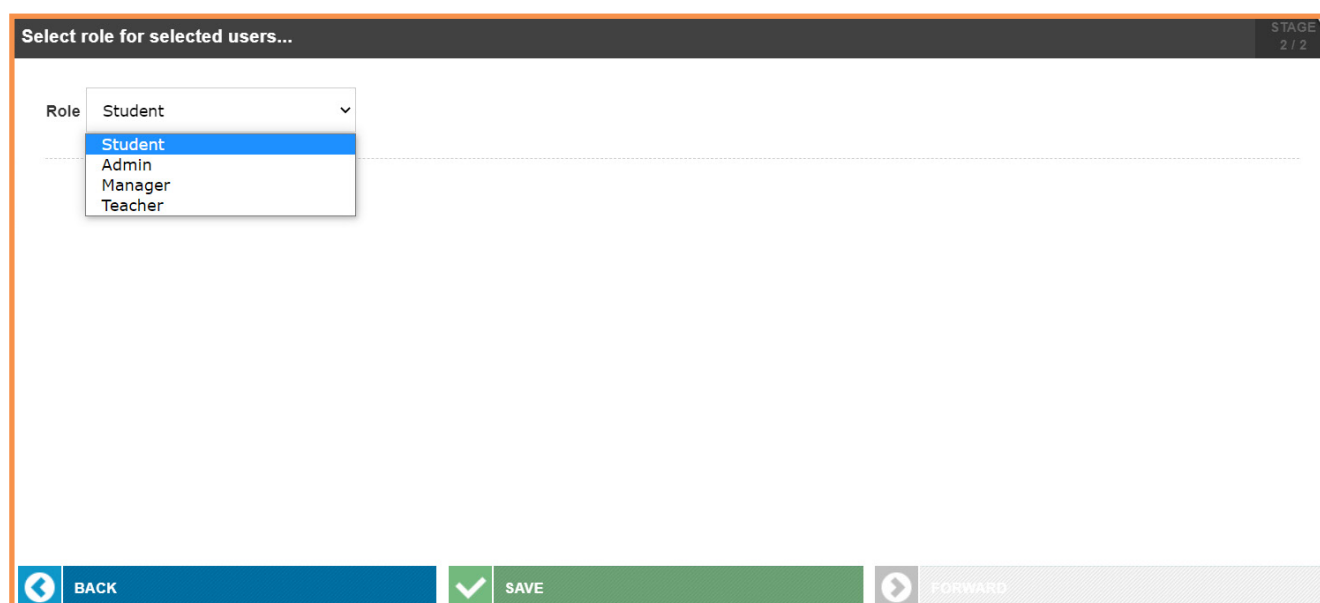


The screenshot displays a group management interface for a group named "Testing". At the top, there are several tabs: "Group" (active), "Edit Group", "Edit Users", and "Group Notes". Below these are more tabs: "Group Files", "Group Web Forms", and "Add Group To Web Form". A "Show All" button is visible on the left. The main content area shows a list of group details with columns for "Group Details", "Sub Groups", "Group Courses", and "Group Users". Each column has a dropdown arrow. Below this, there are four rows of actions: "Group Details" with a "COPY GROUP" button, "Sub Groups" with an "ADD SUB GROUP" button, "Group Courses" with an "ADD COURSES" button, and "Group Users" with an "ADD USERS" button. An orange arrow points from the text above to the "ADD USERS" button. The "Group Title" is "Testing" and the "Group Type" is "Default".

Select the **Learner/s** you would like for this group. Select **Forward**



Select the **Student** role from the dropdown.



Select **Save** in order to assign an learners to the group.

Repeat steps to add Learners on **page 60**, any time an employer needs access to a new learner.



# Skills Portfolio



[www.skillsforward.co.uk](http://www.skillsforward.co.uk)



[info@skillsforward.co.uk](mailto:info@skillsforward.co.uk)



0300 102 1023

