



Skills Portfolio

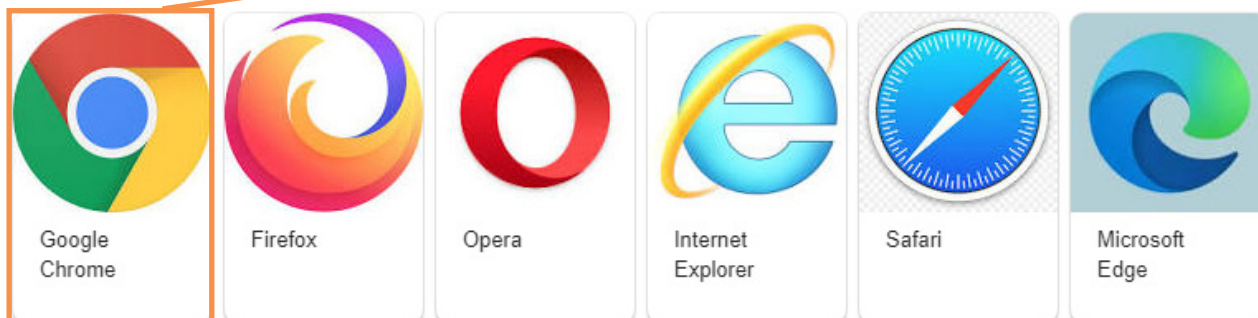
How to Build/Assign an Assessment Plan

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Logging into Skills Forward

1. Open your Web Browser (Preferably Chrome)



2. Enter the following address - myskillsforward.co.uk



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

What is an Assessment Plan?

An assessment plan is for **portfolio users only**. An assessment plan is a series of task/instructions hosted on templates that can be assigned to learner's profiles.

These tasks/instructions will be directly linked to criteria present in a qualification they are assigned too. The idea is 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.

Process:

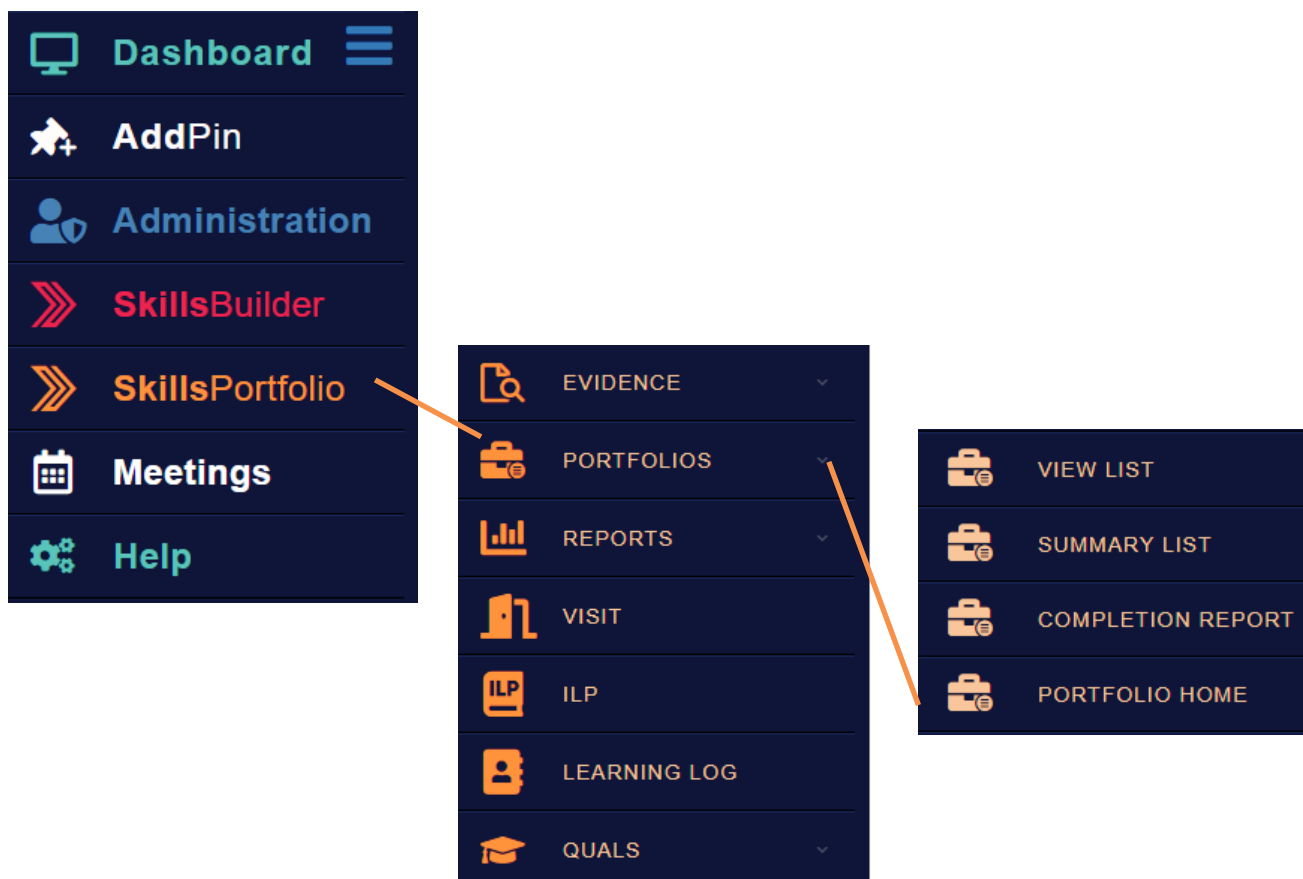
In order to create an assessment plan first you must add all templates that hold the relevant instruction, you will then knit/LINK these templates together to form the assessment plan.

The screenshot displays the Skills Forward SkillsPortfolio interface. On the left is a dark blue navigation sidebar with icons and labels for Dashboard, AddPin, Administration, SkillsBuilder, SkillsPortfolio, Meetings, Help, and Settings. The main area is titled 'SkillsPortfolio' and contains several data visualization and action components:

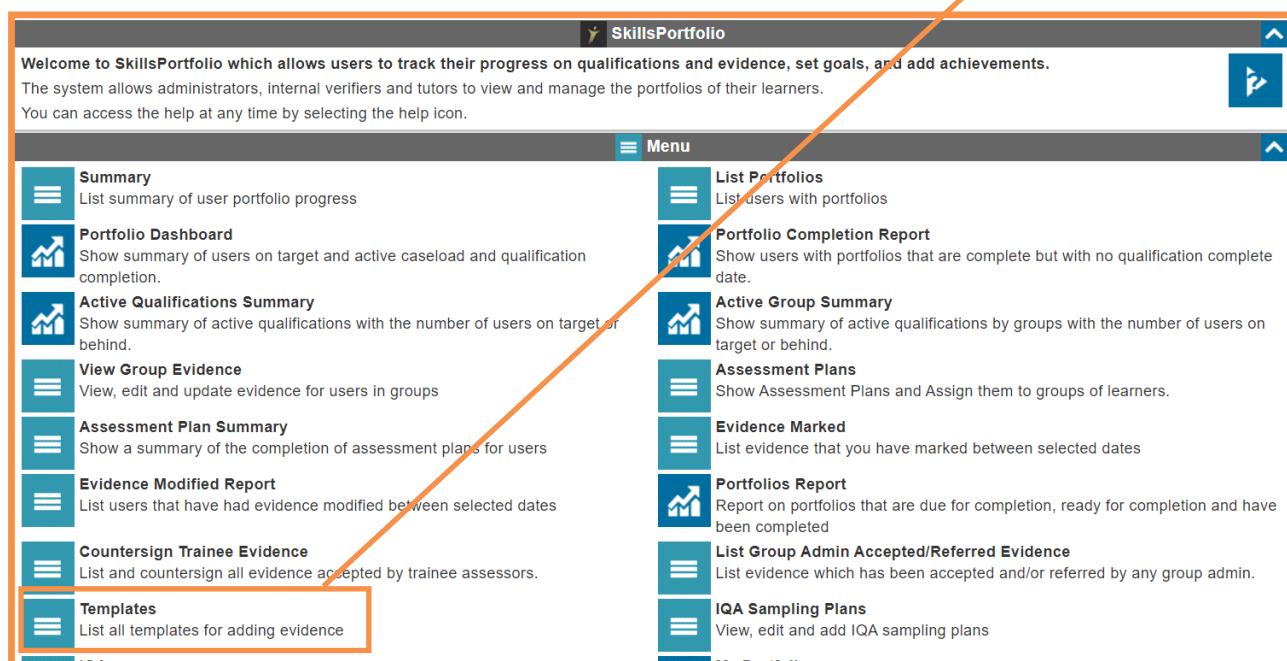
- Qualification(s)**: A pie chart showing the status of qualifications: 7 Not Set (red), 1 On Target (green), and 8 Concern (grey).
- Off-The-Job Training (OTJ)**: Two progress bars. The first shows 'Users on target' at 1/7 Users. The second shows 'Total Expected' at 770/2122 hours.
- Activity**: Three cards representing recent actions: 'SUBMITTED (4 WEEKS)', 'UPDATED', and 'ADD FOR GROUP'. Each card has an orange arrow icon and a corresponding 'EVIDENCE' button.
- Quick Links**: A row of six buttons for quick navigation: 'PLAN' (IQA), 'VIEW LIST' (PORTFOLIOS), 'VIDEO' (USING PORTFOLIO), 'VIEW' (VISIT), 'VIEW' (ILP), and 'VIEW' (LEARNING LOG).

Add a Template

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 **'Templates'**



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

The screenshot shows the 'Templates' interface. At the top right, there is a green button with a plus sign and the text 'ADD TEMPLATE'. An orange arrow points from this button to the text above. Below the button are filter options: 'All Plans', 'Select Unit', and 'All Evidence'. An 'UPDATE' button is located at the bottom right of the filter section. Below the filters is a 'Results' section with a table. The table has columns for 'Template Title', 'Evidence Type', 'Units', 'Owner', and 'Actions'. The first row shows '101', 'Generic', '1', and 'Institution'.

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

The screenshot shows the 'Add Template' form. The 'Title' field is highlighted with an orange box. A callout box points to this field with the following text: **Title** – no rules as to what this needs to be just needs to be relevant, initially title the templates **'task1'** – **'task x'** as it makes it easier to link the templates in the correct order. Other fields in the form include 'Owner' (Institution), 'Evidence Type' (Generic), 'Linked Evidence Template' (-), 'Traffic Light' (-), and 'Group' (Available to all). There is also a 'Qualifications' dropdown and an 'UPDATE' button at the top right.

Default title – this will only show once the user physically opens the template so can hold more data if needs be.

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.: ‘Please 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 - If the template requires attachments please drag and drop them here.

Drag files or click here to upload



(Max size: 125MB per upload)

It is essential you then map this template to the relevant unit/criteria using the **blue drop down** in relation to the qualification icon located at the bottom of page.

The screenshot shows a 'Qualifications' interface with a list of 'Unassigned Qualifications'. The list includes:

- Customer Service Standard
- Customer Service Practitioner
- End Point Assessment (checkbox)
- Diploma
- VTCT Level 2 NVQ Diploma in Hairdressing (QCF)
- Functional Skills
- NVQ
- Standard
- Technical Certificate
- Other

At the bottom of the interface, there are buttons for 'Back To Top', 'UPDATE' (with a green checkmark), and 'CANCEL' (with a red X). An orange arrow points from the 'UPDATE' button back to the 'End Point Assessment' checkbox.

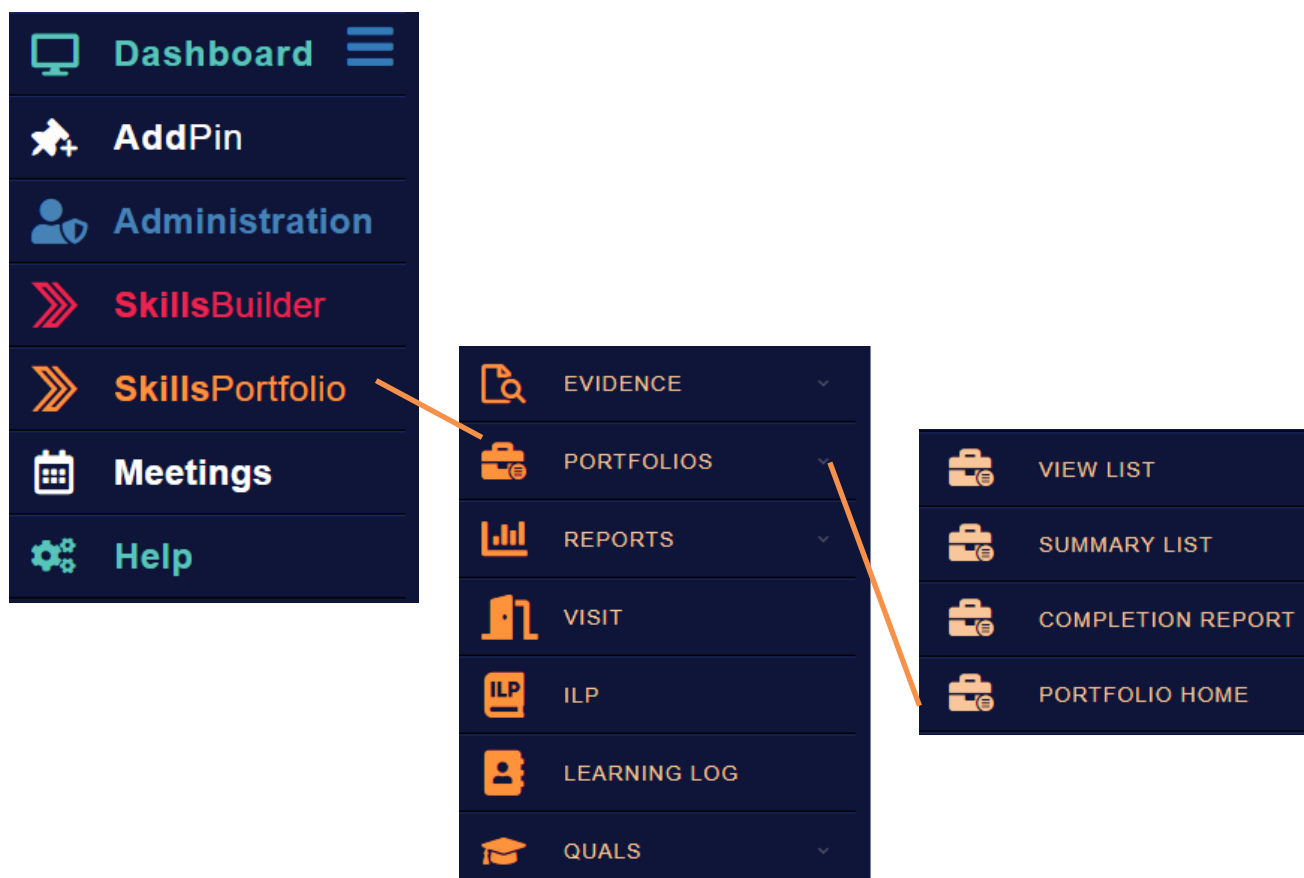
Here you will be able to tick the box of the relevant unit and press **update**. You will map it to the criteria once you have pressed update in the same fashion as before.

All other fields are not mandatory and are not usually required to populate them.

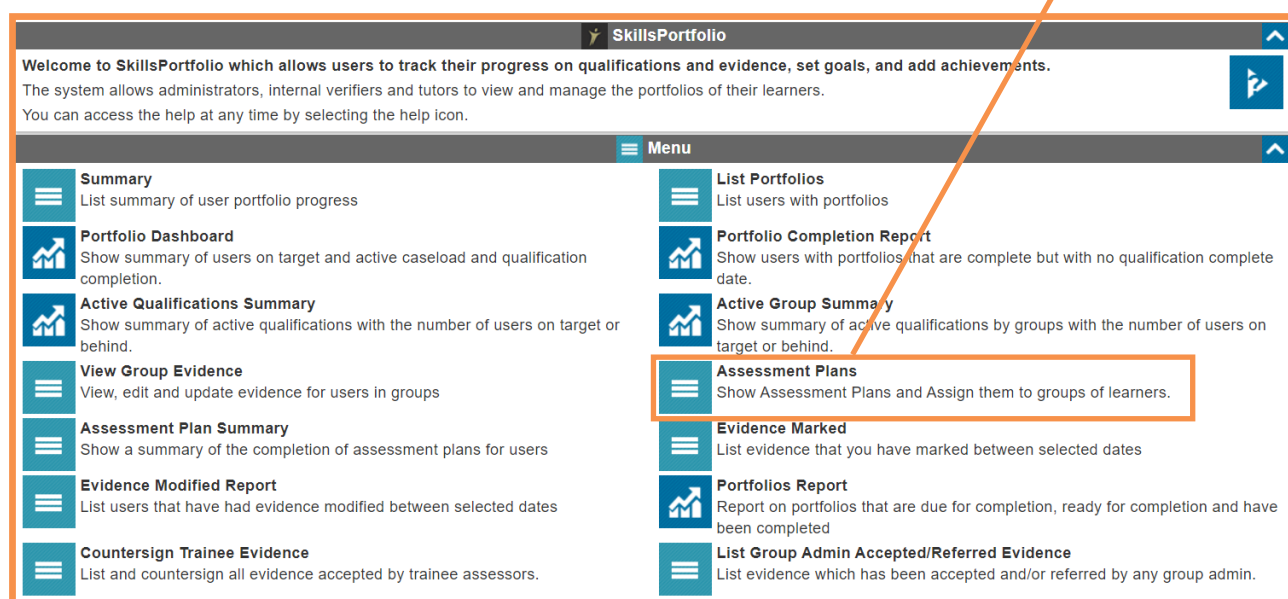
REPEAT THIS PROCESS UNTIL YOU HAVE A TEMPLATE FOR VERY UNIT/ CRITERIA PRESENT ON THE DESIRED QUALIFICATION.

Knit / LINK Templates together to form the 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'**.



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

Friendly Title

Plan reference

Valid From

Valid To

Add Template

Add Linked Assessment Plan

Title - no rules as to what this needs to be just needs to be relevant I usually consult the client for their input.

Friendly title – this will only show once the user physically opens the plan so can hold more data if needs be.

Plan reference - no rules as to what this needs to be just needs to be relevant I usually consult the client for their input. E.g.: LETTA/01

Add template – select the template you would like to be shown first in the plan. And proceed to press update

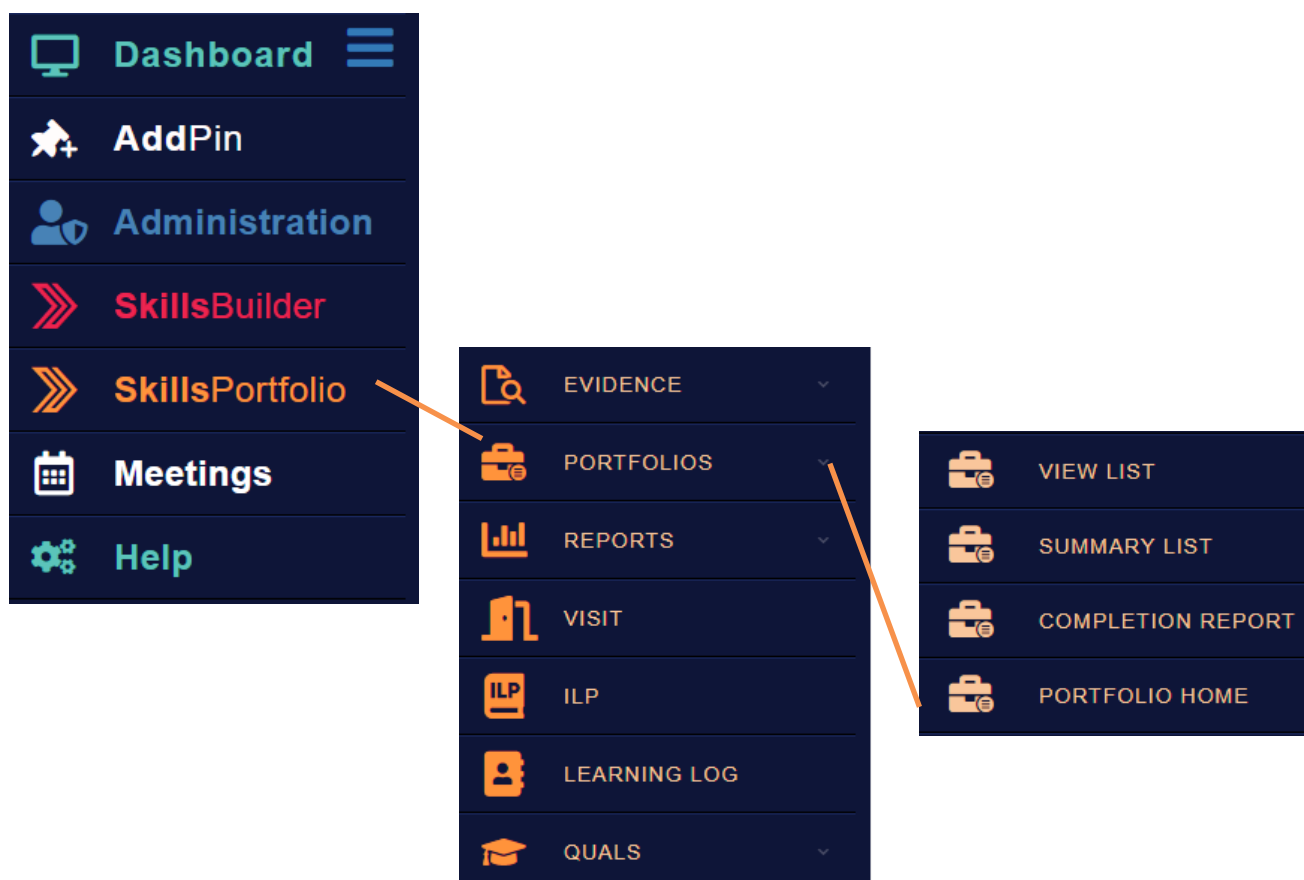
Add Linked Assessment Plan – repeat the previous step until all templates are present in the plan in the order you would expect.

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

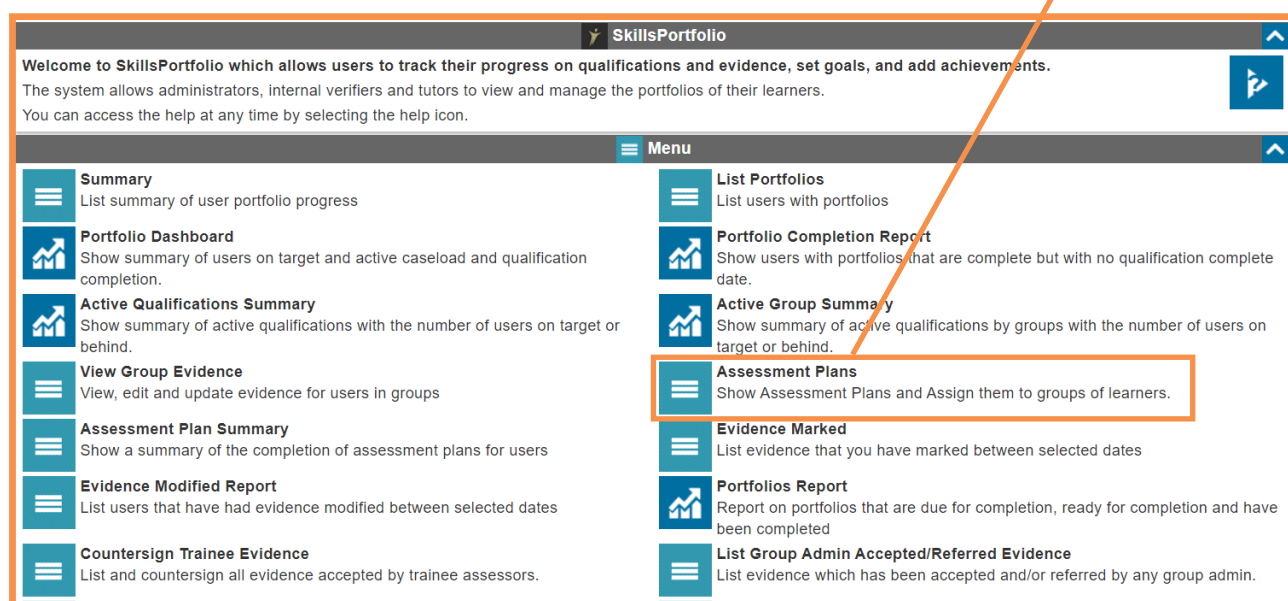


Assign an Assessment Plan

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 please select the **dropdown arrow** next to the edit plan icon in relation to the relevant plan. Proceed to select **Assign Plan**.

The screenshot shows a table titled 'Assessment Plans' with the following columns: Title, Friendly Title, Reference, Templates, Valid From, Valid To, and Actions. The table lists several assessment plans, including Automotive LV, Azesta, Customer Service, H&S, Need, Prem Dem, SeaRegs, testing, and Total Training. The 'Actions' column for each row contains an 'EDIT PLAN' button with a dropdown arrow. A callout box highlights the dropdown menu for the 'Total Training' row, showing the following options: EDIT PLAN (with an up arrow), ASSIGN PLAN (highlighted in green), SUMMARY, DELETE PLAN (with a red X), and STRUCTURE (with a down arrow).

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 ▲ ASSIGN PLAN SUMMARY DELETE PLAN STRUCTURE

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

Assign Assessment Plan

Group Portfolio Group ▼ *

Users
 8 Students

Assign All
 Assign template if user not assigned to units(s)

Target Start
 Set to days before target.

Automatic Target Range
 From To

Templates

Template Start Date	End Date	Status	Type	Select
101	<input type="text"/>	<input type="text"/>	Planned ▼	Witness Testimony ▼ <input checked="" type="checkbox"/>

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.



Skills Portfolio



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