City & Guilds | Learning Assistant

THE E-PORTFOLIO DESIGNED AROUND YOU

Training Manual

Assessor & IQA

Version 4.0

Introduction

This training manual is designed to take you through the basic steps in the assessment cycle within Learning Assistant.

1. **You will log in as a candidate**: upload a piece of evidence, cross reference the evidence against the qualification and send a completed Learning Outcome/assignment to your assessor

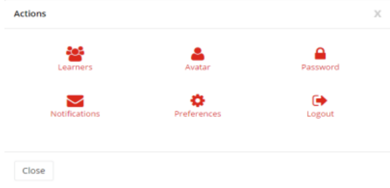
2. **You will log in as an assessor**: look at the work the learner has sent you, sign off individual criteria, make an assessment decision, give your learner feedback and record an observation on the candidate

3. **You will then IQA your colleagues work**: sample some work, decide to refer it back to your assessor or verify it as completed and give your feedback.

Getting Started

Once you have logged in:

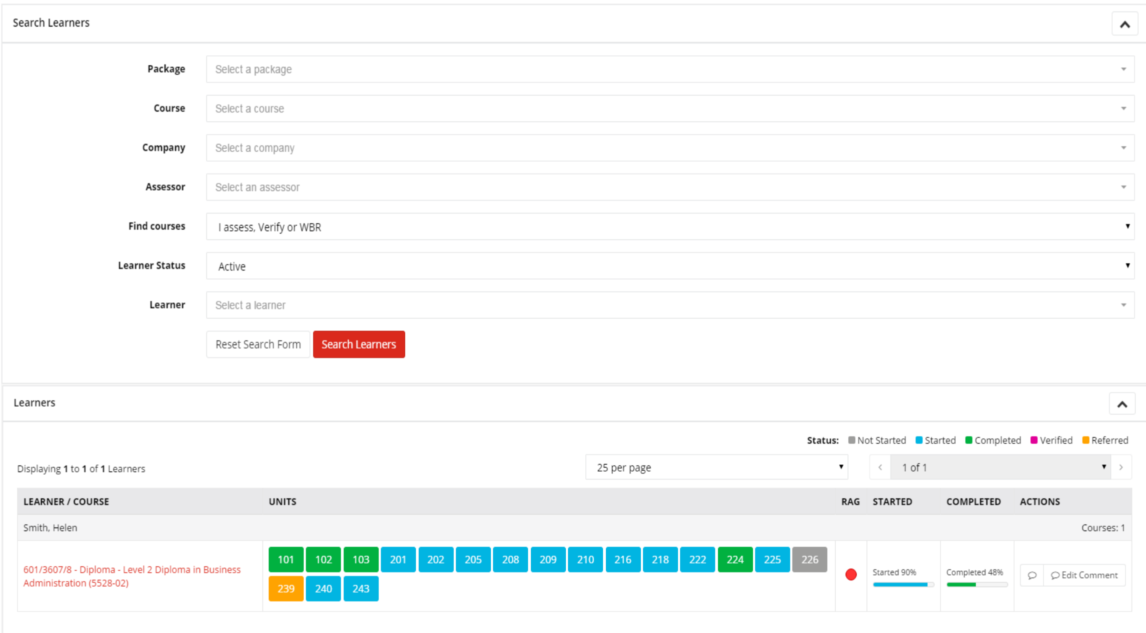
Update your details in **PROFILE** by clicking on the profile picture icon



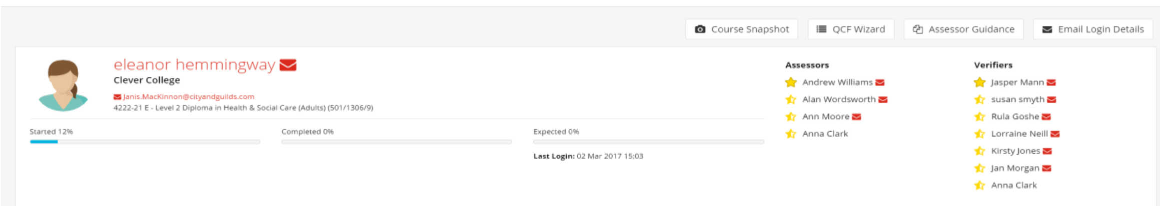
- **Learners** – you can quickly find a learner's portfolio by using their name
- **Avatar** - you can upload a photo of yourself
- **Password** – You can change your password at any time (always keep it secure)
- **Notifications** – this allows you to manage your caseload a little easier by letting the Learning Assistant System send you updates on changes within your caseload
- **Preferences** – this allows you to set certain aspect of the system to suit your needs

To find your learners, click on the Learner tab in the navigation bar

- Using the search filters, go to **FIND COURSES** and change it to **I ASSESS** and click **Search**
- Your test learner will be listed below



- Clicking on the learners **portfolio name** will open their portfolio
- You can select additional optional units for your candidates by clicking on the **QCF Wizard** (top right)



Part 1: Review as a Candidate

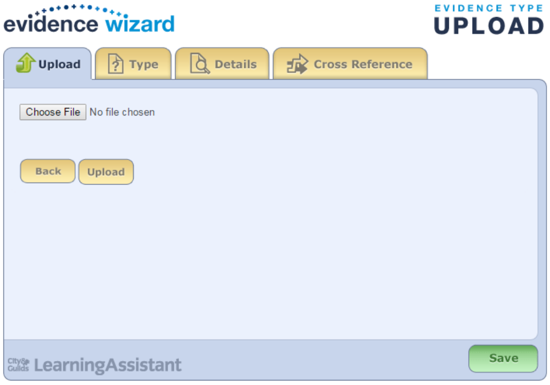
- Login as the candidate

We will be covering 3 stages

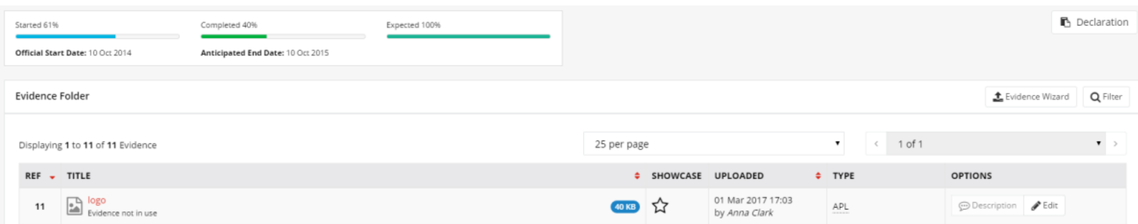
1: Upload evidence 2: Cross Reference 3: Submit Learning Outcome to Assessor

Upload Evidence & Cross Reference

- Go to the **Evidence Folder** tab
- Click on **Evidence Wizard** – located on the right hand side of the screen
- Within the Evidence Wizard, **Browse** and **Upload** evidence (anything of a digital nature)



- Moving along the tabs across the top, determine the **Evidence Type**, add the relevant **Details**
- Click the **Cross Reference** tab, click into a **Unit**, click into a **Learning Outcome** (Element)
- Tick as many boxes as are relevant in the **Assessment Criteria** in the drop down list
- Click **Save** after each **Unit**
- You can select additional units, outcomes and criteria for the same piece of evidence
- Once you have completed the cross referencing, click **Save**

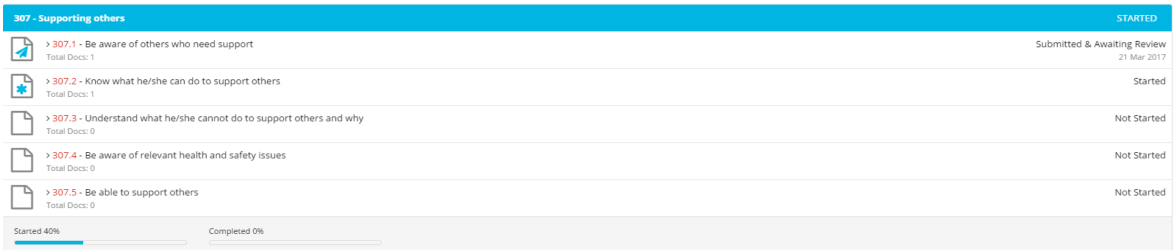


- **Repeat** this process to upload and cross-reference a second piece of evidence

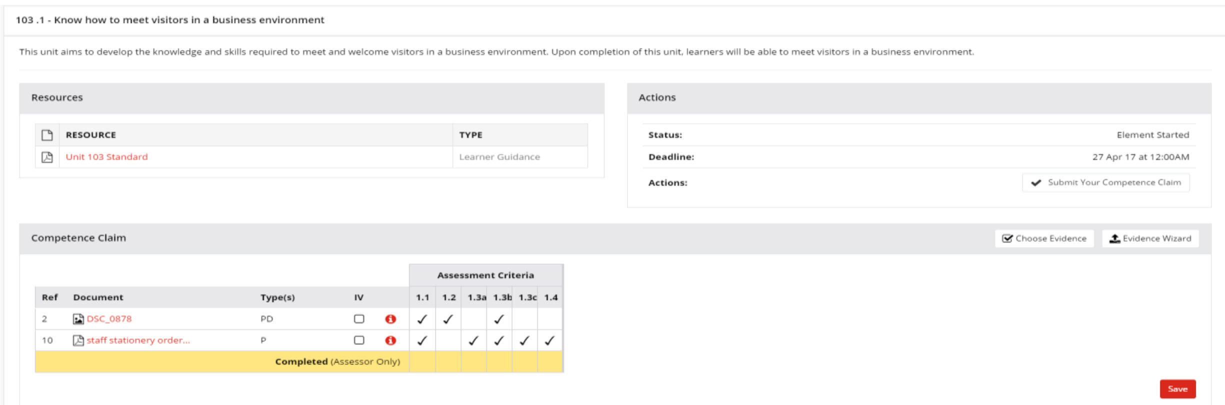
Tip: You should now see the piece of evidence uploaded in the Evidence Folder, with a date stamp and signature of who uploaded the evidence. Hover over the Description button, and the details of the evidence will pop up. If you have forgotten to cross reference every criteria, click on the Edit button to continue cross referencing or edit the details you added earlier.

Submit work to your Assessor

- Go to the **Course Folder**
- Find a **Learning Outcome** that has been **Started**



- Click on the **Learning Outcome** number
- Within the Outcome you'll see the pieces of evidence that you cross referenced earlier



Tip: you could add further evidence from the evidence folder if you wish by clicking on Choose Evidence tab, and continue cross reference within the matrix.

- If you think you have completed the **Learning Outcome**, you can send it to your assessor by clicking **Submit Your Competence Claim**
- The outcome status has now changed to **Element Submitted & Awaiting Review**
- The outcome is now locked and cannot be edited until the assessor and reviewed and given feedback

Tip: Have you found the Candidate Declaration? This is something your candidate should sign at the beginning of their qualification, but it can be signed multiple times e.g. after each completed unit.

Log out as the candidate

Part 2a: Review as an Assessor

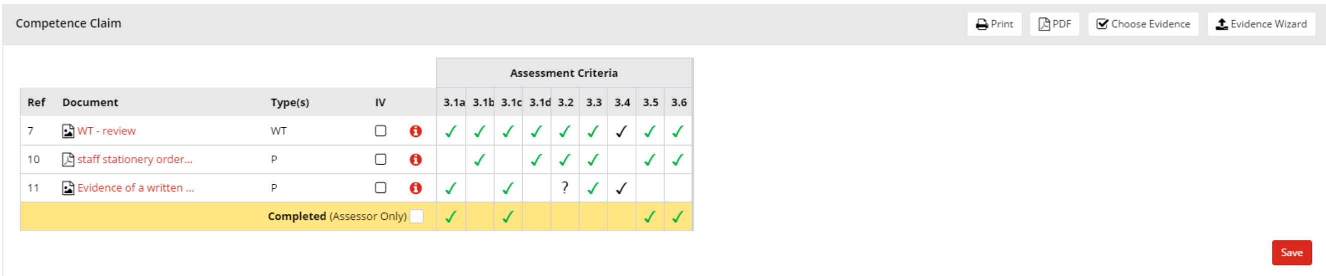
Log in as yourself

Assessing the candidates work

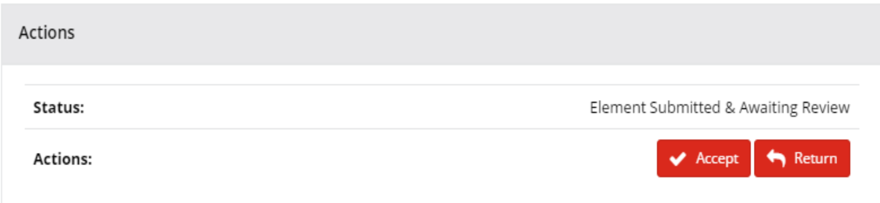
- Go to **Assessor Task**
- See the **Awaiting Review** box

- Click on the **Outcome (Element)** submitted to you by your candidate
- Click on the **Evidence** to review its contents
- Change the **black ticks** into **green ticks** and **question marks**

Tip: You will need to standardise as a team as to how this function is used e.g. what does the question mark represent.



- **Save**
- You can sign off individual criteria as completed by clicking in the **Completed (Assessor Only) matrix** – this controls the learner progress
- If you require the learner to do some additional work, click **Return**



- A **Contact Diary** window will open, Type your feedback into the **Action** box
- Ask your candidate to acknowledge your feedback, by ticking in the **Require Candidate Acknowledgement?**
- Click **Create**

Tip: you could add a meeting date with your candidate, upload a document/resource. When you candidate acknowledges the feedback, it will date stamp the date and time within the Contact Diary entry.

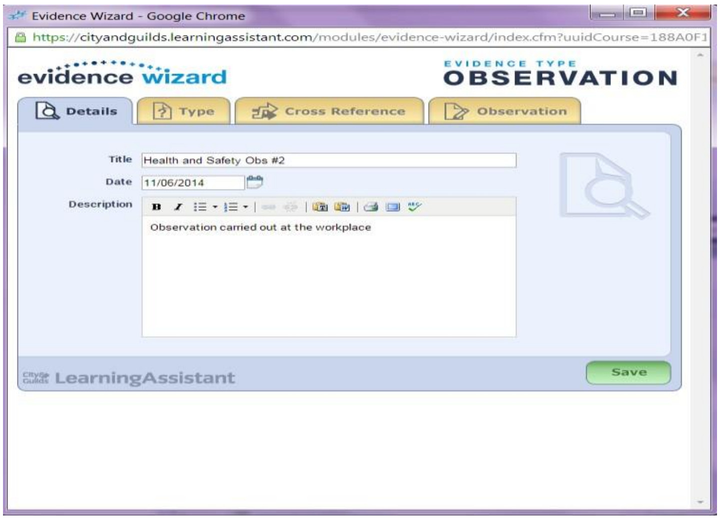
- Click **Close**
- The outcome status has now changed to **Element Reviewed and Returned**. Your feedback has been added to the bottom of the page
- Go to the candidate's **Contact Diary** – see your feedback here too

Tip: you can always add Contact Diary entries by clicking the Create Entry tab (top right)

Recording an Observation

This is a template built into Learning Assistant to record a holistic observation directly into your candidate’s portfolio.

- Go to the candidates **Evidence** Folder
- Click **Evidence Wizard** (top, right hand side)
- Click **Create New Observation**
- Add in the observation **Details**, moving across the tabs



- Click **Evidence Type**, Observation is already ticked but if relevant you could add additional licence types
- Click **Cross Reference** where you can holistically reference all the criteria that was met
- Click **Observation** to record further information from your observation
- Click **Save**
- The Observation has now been saved in the Evidence Folder as a PDF

Once again, you can go to the **Course** folder and sign off individual criteria

- Find a Unit/Learning Outcome that has been **Started,** and click on the blue **Unit/Learning Outcome** number
- You can sign off individual criteria as completed by clicking in the **Completed (Assessor Only) matrix** – this controls the learner progress
- **Save**

Ref	Document	Type(s)	IV	Assessment Criteria 1.1	1.2	1.3	1.4	1.5
7	WT - review	WT		✓	✓	✓	✓	✓
10	staff stationery order...	P		✓	✓	✓		✓
11	Evidence of a written ...	P		✓		✓		
		Completed (Assessor Only)		✓		✓		✓

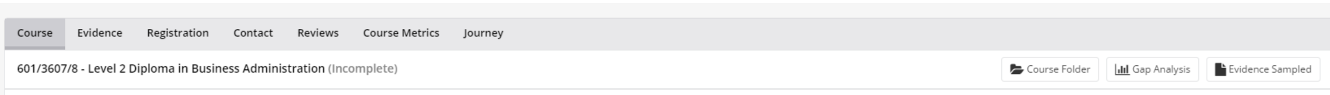
Changing the status of an Outcome

Next, to show how an assessor can easily change their original assessment decision:

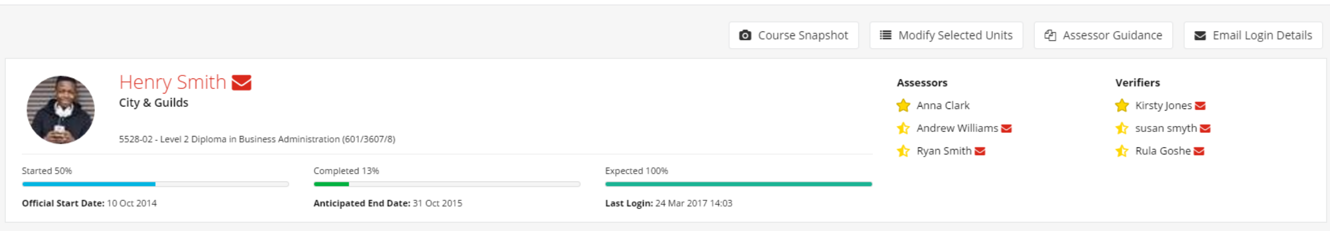
- Go to the candidate's **Course Folder**
- Within the outcome you **Reviewed and Returned** earlier, click on the **Accept** button
- Type in different feedback into the **Action** box
- Again, you can ask your learner to acknowledge the feedback
- **Create and Close**
- The outcome status has now changed to **Element Reviewed and Accepted**

It's as easy as that!

Have you found the **Gap Analysis** and **Course Progress** tabs – within the Course Folder, top right you will see 3 icons?



Have you found the **Assessor Declaration**?



Part 2b: Using Learning Assistant for City & Guilds VRQ delivery

- Go the filters **Candidate Folder**
- Using the search filters, change the search filter **Find Course** to **'I Assess'**
- Select a candidate on the **City & Guilds VRQ course**

Within the candidate portfolio, you will see that as an assessor you can control when your candidate will start a task and which tasks should be included in their portfolio click on the icons

- Click the Release to **Release the Task** for the candidate
- Click the Exclude to **Exclude the Task** from the candidate portfolio

Review as a Candidate

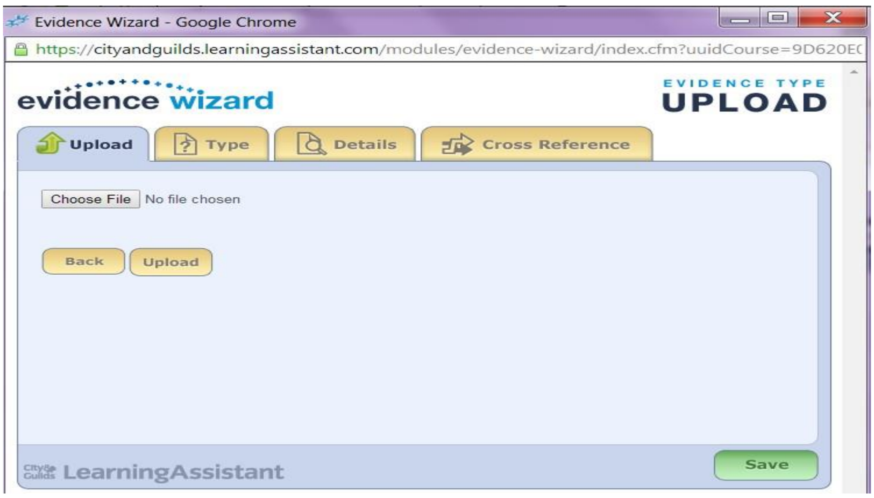
- **Log in as the candidate**

We will be covering 3 stages

1: Upload evidence 2: Cross Reference 3: Submit Task to Assessor

Upload Evidence & Cross Reference

- Go to the **Evidence Folder** tab
- Click on **Evidence Wizard** – located on the right hand side of the screen
- Within the Evidence Wizard, **Select Upload a File**, **Browse** and **Upload** evidence (anything of a digital nature)
- Moving along the tabs across the top, determine the **Evidence Type**, add the relevant **Details**
- Click the **Cross Reference** tab, click the **Task** this evidence is related to
- Click **Save**



Tip: You should now see the piece of evidence uploaded in the Evidence Folder, with the date stamp and signature of who uploaded the evidence. Hover over the 'E' button, and the details of the evidence will pop up

- Repeat this process to upload and cross-reference a second piece of evidence

Submit Task to your Assessor

- Go to the **Course** Folder
- Find a Task that has been **Started**
- Click on the **Task number**
- Within the Task you'll see the pieces of evidence that you cross referenced earlier


Related Evidence

Choose Evidence | Evidence Wizard

Displaying 1 to 3 of 3 Evidence | 25 per page | 1 of 1

REF	EVIDENCE	TYPE	IV
48	Evidence 12 Oct 2016	None	
50	minutes to a meeting	P	
51	professional discussion with team	PD	

- If you think you have completed the Task, you can send it to your assessor by clicking **Submit Your Task**
- The outcome status has now changed to **Task Submitted & Awaiting Review**

Tip: Have you found the Candidate Declaration? This is something your candidate should sign at the beginning of their qualification, but it can be signed multiple times e.g. after each completed unit.

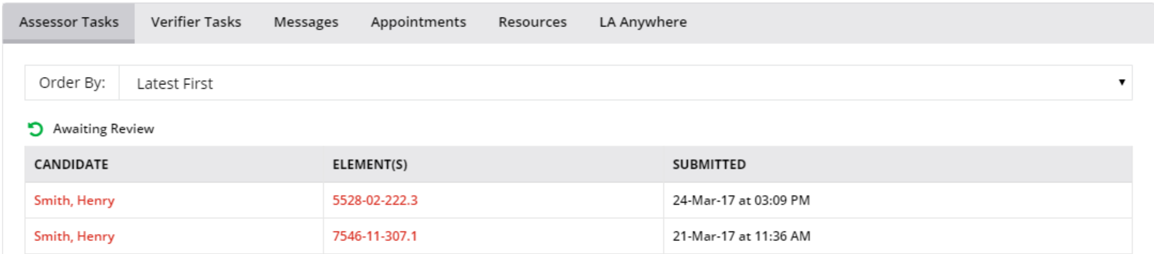
Log out as the candidate

Review as an Assessor

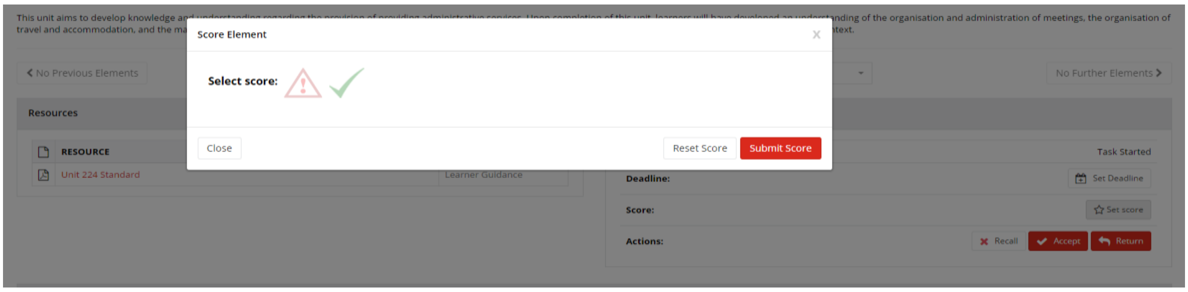
Log in as yourself

Assessing the candidates work and setting a Grade

- Go to **Assessor Task**
- See the **Awaiting Review** box

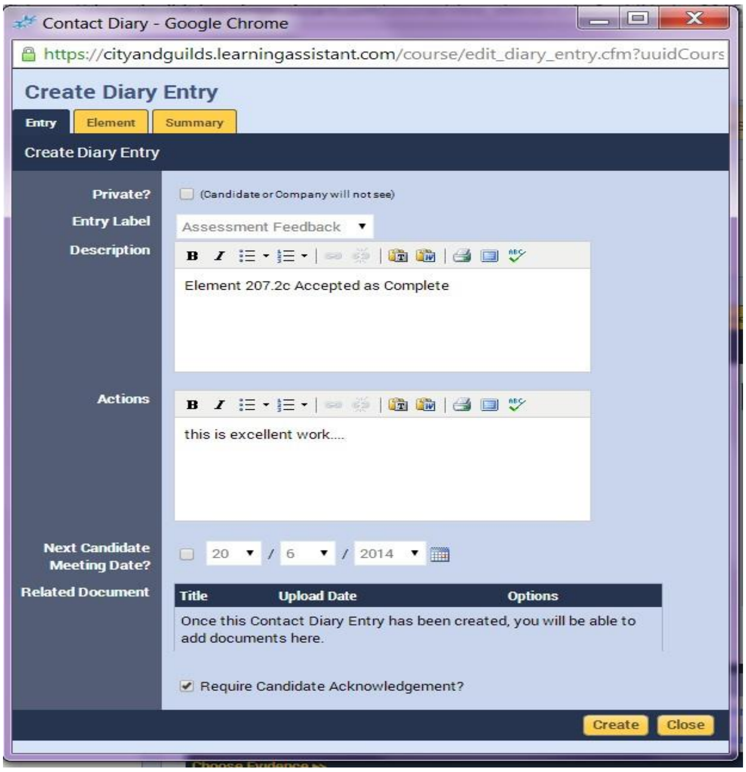


- Click on the **Task (Element)** submitted to you by your candidate
- Click on the **Evidence** to review its contents
- If you are happy that your candidate has done sufficient work, you can give your candidate a **Grade** by clicking on **Set Score**



- To sign off the Task as complete, click **Accept** (if you need your candidate to do more work, you would click **Return**)
- A **Contact Diary** window will open, Type your feedback into the **Action** box
- Click **Create**

Tip: you could add a meeting date with your candidate, upload a document/resource and ask for your candidate to acknowledge the feedback



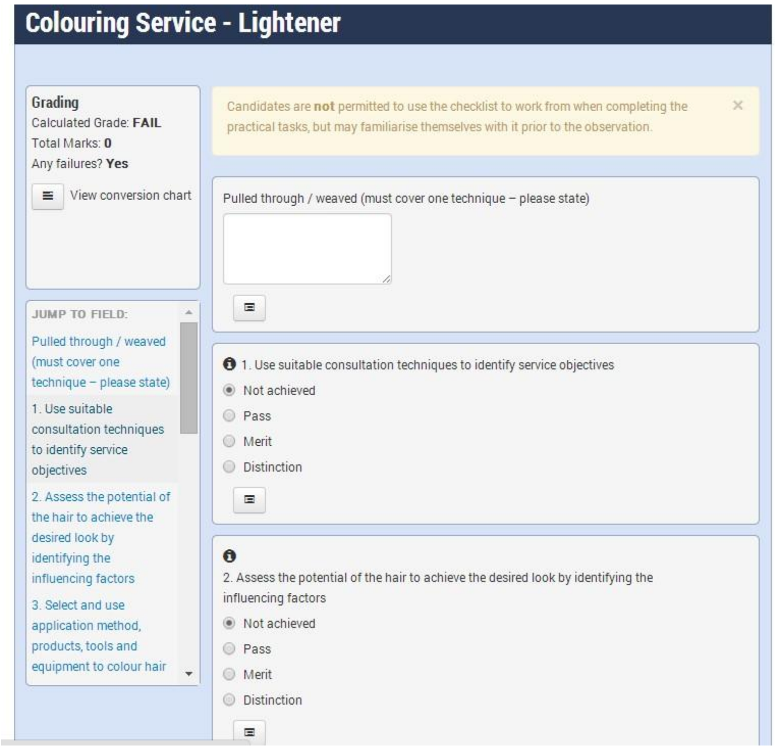
- Click **Close**
- The outcome status has now changed to **Element Reviewed and Accepted**. Your feedback has been added to the bottom of the page
- Go to the candidate's **Contact Diary** – see your feedback here too

Using the Grading Checklist and Recording Forms

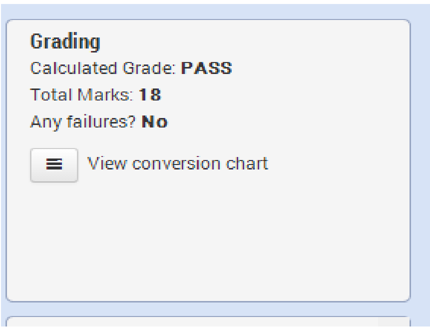
Certain Tasks will have the City & Guilds grading checklist populated in the Task.

- In the relevant Task, go to **Grading Checklists** or **Recording Forms**

- Click on the **VIEW/START filling in the checklist/form now**, it will open in a new window
- Complete the checklist as per the qualification standards



- You can add **additional notes** by clicking on
- Find out what the **grade requirements** are by clicking on
- Once you have completed the checklist, the **Grade** will be automatically worked out in the top right hand side of the checklist



- To save the checklist, click **Save and Submit**
- The checklist will then state ‘Success! Your form has been saved’, click **Close**
- Click **Close** in the checklist
- Your checklist will now be saved in the evidence folder as a PDF

Have you found the **Modify Selected Units** (top right)? This allows you to choose optional units for your candidate

Have you found the **Assessor Declaration**?

Part 3: Review as an IQA

You don't need to logout, Learning Assistant separates your caseload for you.

Assessor Tasks | Verifier Tasks | Messages | Appointments | Resources | LA Anywhere

Order By: Latest First

Sampling Plan Tasks

CANDIDATE	COURSE	UNIT	EVIDENCE TYPES	DATE
Learner, Susan	5528-02	222	PD,P	21/06/17
Learner, Susan	5528-02	224	O,PD	21/06/17

Awaiting Verification

CANDIDATE	COURSE	UNITS
Franks,Martin	1234-33	1
Smith,Adam	AutoLV	2

Referred

CANDIDATE	ELEMENT(S)	REFERRED	UPDATED
Williams, Eric	0640-20 255.2	18-Oct-16 at 11:53 AM	

Sampling a Learning Outcome/Task

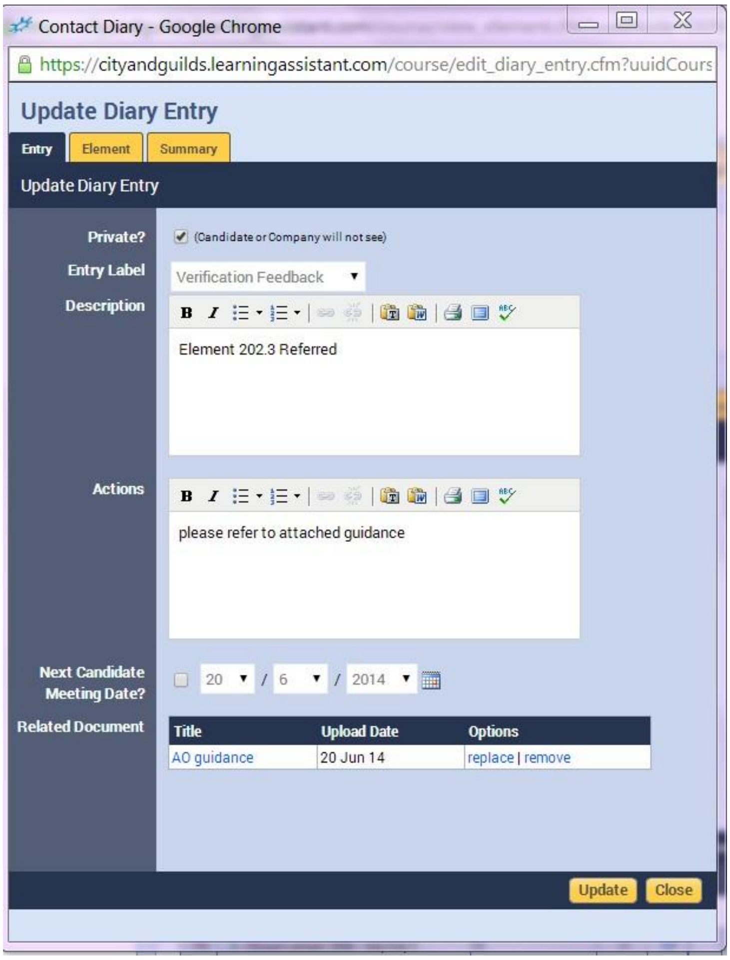
- Go to the **Candidate Folder** – Candidate Manager
- Click on the filter **Find Courses** and change to **I Verify**
- **Search**
- Click on the name of your new Candidate
- Within the Candidate's **Course Folder**, find an **Outcome/Task** that has been **Reviewed and Accepted** by the Assessor
- Open up the **Outcome/Task**
- Select a piece of evidence to sample, tick within **IV column**. This visually shows which evidence you have sampled and which evidence the feedback is related to.

Competence Claim

Ref	Document	Type(s)	IV		Assessment Criteria 1.1	1.2	1.3	1.4	1.5
1	stationary order	P	☑	ℹ	✓	✓		✓	✓
2	samples of emails	P	☑	ℹ	✓	✓	✓	✓	✓
			Completed (Assessor Only)		✓	✓	✓	✓	✓

Tip: if you can't do this, it might be because an evidence type was not selected. Simply click on the and click on evidence type and choose the correct evidence type

- If you wish, you could turn the assessor **green ticks** into **question marks** and **pink ticks** (this is not relevant to the VRQ type qualifications)
- To send the work back to the Assessor with action points, click **Refer**
- A **Contact Diary** entry will open, within the **Actions** explain why you are referring the Outcome/Task



Tip: As an IQA your contact diary entries are set to Private i.e. the candidate will not see the entries

- **Create** then **Close**
- The **Outcome** status has now changed to **Element Referred**
- Go to your **Homepage**, and look at your **Verifier Task** and find the outcome that you have **Referred** listed

Order By:	Latest First

Sampling Plan Tasks

CANDIDATE	COURSE	UNIT	EVIDENCE TYPES	DATE	
Learner, Susan	5528-02	222	PD,P	21/06/17	
Learner, Susan	5528-02	224	O,PD	21/06/17	

Awaiting Verification

CANDIDATE	COURSE	UNITS
Franks,Martin	1234-33	1
Smith,Adam	AutoLV	2

Referred

CANDIDATE	ELEMENT(S)	REFERRED	UPDATED
Williams, Eric	0640-20 255.2	18-Oct-16 at 11:53 AM	

Back to the Assessor Role

- Go to your **Homepage**, and into **Assessor Tasks**
- See the **Verifier Referrals** box

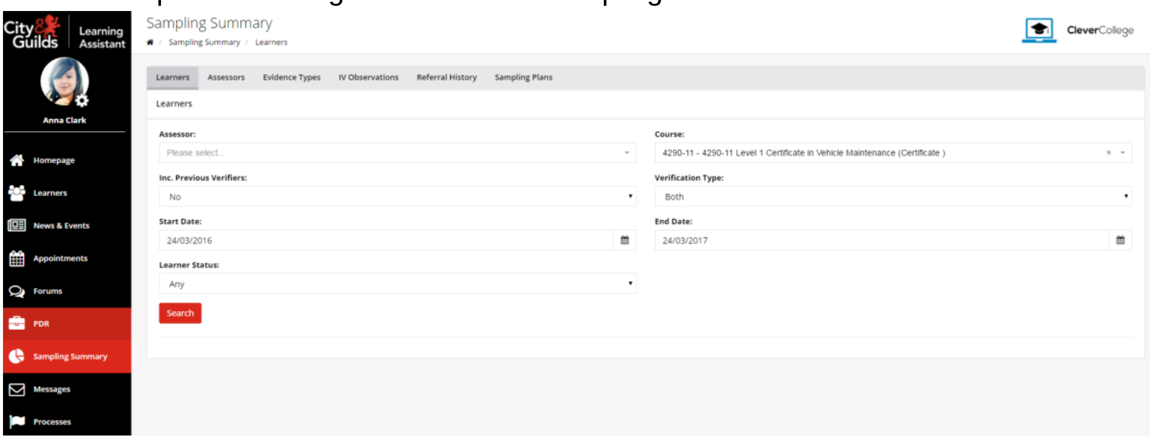
Verifier Referrals

CANDIDATE	ELEMENT(S)	REFERRED
Smith, Helen	5528-02 239.2	09-Sep-15 at 10:22 AM

- Click on the **Outcome/Tasks** referred by your IQA
- Read your IQAs feedback in the **Contact Diary** at the bottom of the page
- Respond to your **IQAs** remarks by clicking **Create Entry**
- To ensure your candidate does not see the entry, tick **Private**
- Change the **Entry Label** to **Verification Feedback**
- Give the entry a **Description** e.g. Referral Response
- In the **Action** box, add your remarks for the IQA
- **Create and Close**

Tip: if the Outcome/Task needs additional evidence or work from the candidate, you can Return the work to the candidate by clicking Return.

Go to **SAMPLE SUMMARY** and watch the support video to discover more about your IQA tools and reports including how to build a Sampling Plan



Tip: Go to your **Homepage**, click on **RESOURCE** go to **Visit the LA Portal** for additional support Movies and Forums

Click on **Apps** to find out more about our LA APP and LA Anywhere

There are three places to where RESOURCES can be added to Learning Assistant depending one what they are: **RESOURCES** tab on your homepage, on the **LEARNING OUTCOME PAGE** within your candidates Course Folder and under **CANDIDATE/ASSESSOR GUIDANCE** on the candidate portfolio page (top right). Resources are added to Learning Assistant by your SuperUsers.