Assessment Plans

OVERVIEW

Assessment plans help you plan tasks, activities and assessments, helping to track the audit trail of planned work. They can also be used to schedule your next visit with a learner.

Please note that you will need to sync your completed assessment plans to the live system for the tasks to be generated for your learners.

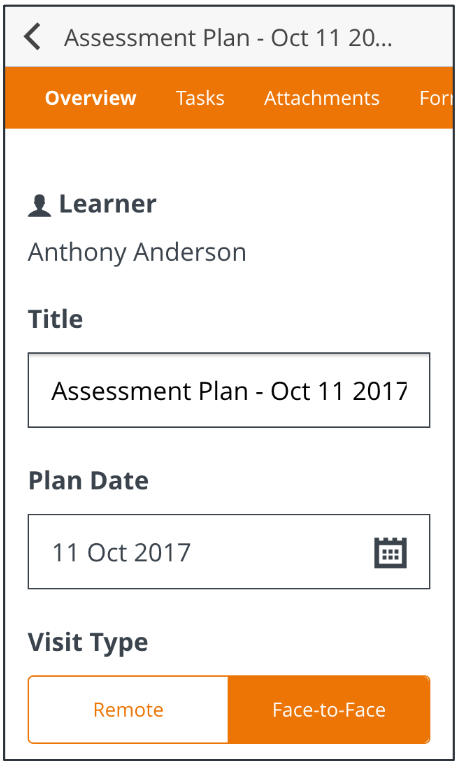
ACCESSING ASSESSMENT PLANS

To start or complete an assessment plan, click on the **Plans** icon on your homepage or learner's overview page.

You'll see two tabs at the top of the page: **Pending** and **Sync Ready**. Any assessment plans that are pending your action, if they've been created on the app or synced from the live system, will be found under the **Pending** tab. Any assessment plans that you mark to finish online or have signed will be under the **Sync Ready** tab, ready to sync up to the live system. To open an assessment plan that's already in this area, you can just tap on its name.

To create an assessment plan on the app, press the **context menu icon** in the bottom-right corner of your screen and tap either **Create Plan** or **Create Plan from Template**, if you want to use an assessment plan template.

SET YOUR TASKS, COMPLETE AND SYNC



With your assessment plan now open, you can fill it in as you would on the live system.

You can set your learners activity tasks and assessment tasks under the Tasks section, and if your centre uses any custom data forms in their assessment plans, these will appears under the Forms section.

When you want to continue to the next section, just swipe right on your screen or tap the next section heading at the top of the page. As you move from one section to another, the app will auto-save your work. This means that if you need to come back to this plan later on, you can just click the back arrow and finish the plan when you're ready.

When you're finished, move on to the **Sign** section to mark your assessment plan as sync ready. Click on the **context menu icon** in the bottom-right corner of your screen:

- **Finish Online** allows you to sync the assessment plan to the live system as it is, so you can make any necessary changes before signing it off.
- **Sign** allows you to sign the assessment plan.
  - Once you've signed, you can **also collect the learner's signature** by clicking on the context menu icon again. The learner can read through the plan and sign it too.

When you've marked your assessment plan as sync ready, exit by clicking the back arrow in the top-left corner of your screen. Your plan will now be marked as **Sync Ready**.

Under the **Sync Ready** section, click on the **Sync all** button in the bottom-right corner of your screen to sync all of your completed assessment plans to the live system. Once this is done, those plans won't appear on your device anymore.

Alternatively, sync individual assessment plans by holding your finger down on one assessment plan to select it and press the **Sync** button in the bottom-right corner of your screen.