Assessment Plans

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OVERVIEW

Assessment Plans are a tool used by Assessors to help plan tasks, activities and assessments for themselves, learners and employers. They can also be used to schedule the next visit with a learner.

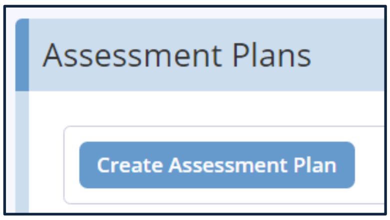
USER RESTRICTIONS

Only assessors can create assessment plans for their learners. However, both assessors and centre managers can create assessment plan templates, which can then be assigned to a selection of learners by their assessors.

DETAILS

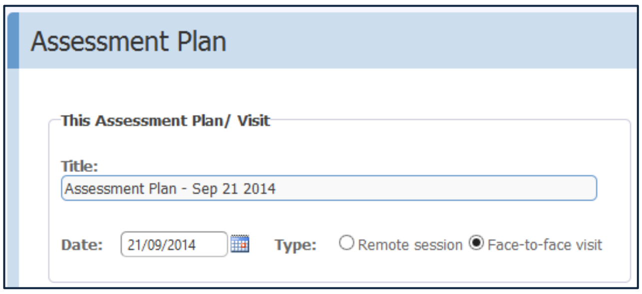
To create a new **Assessment Plan**, follow these steps:

1. Select your learner from the **Assessor Dashboard**
2. Click the **Assessment Plans** icon
3. Click on the **Create Assessment Plan** button



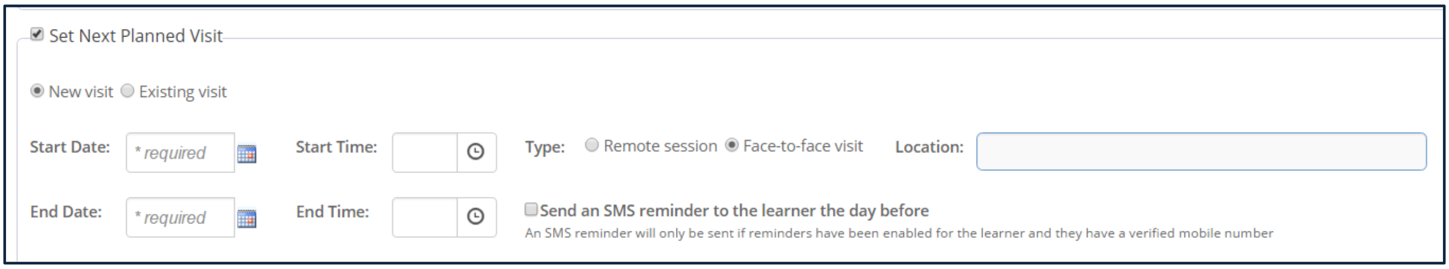
This Assessment Plan/ Visit

The date of the plan will default to the date the assessment plan was created. This can be changed if you would like to backdate the plan.



Next Planned Visit

This section allows you to specify when you are next going to visit the learner. If you haven't already planned to visit the learner, you will need to fill out the following fields:



If a visit has already been scheduled, you can select the **Existing Visit** option. This will display all visits set in the future that you can select from a drop down list.

Click the **Set Next Planned Visit** checkbox if you don't want to set a future visit from the assessment plan.

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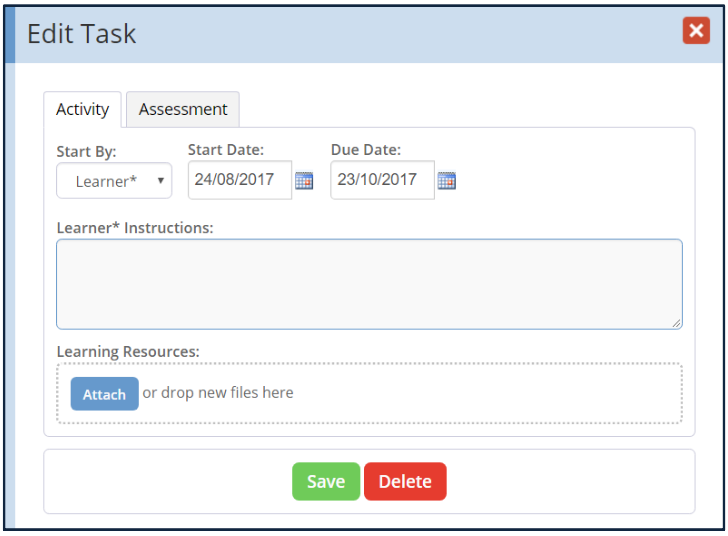
Activity Tasks

Click on the **Add Task** button and then then select the **Activity** tab to create an activity task.

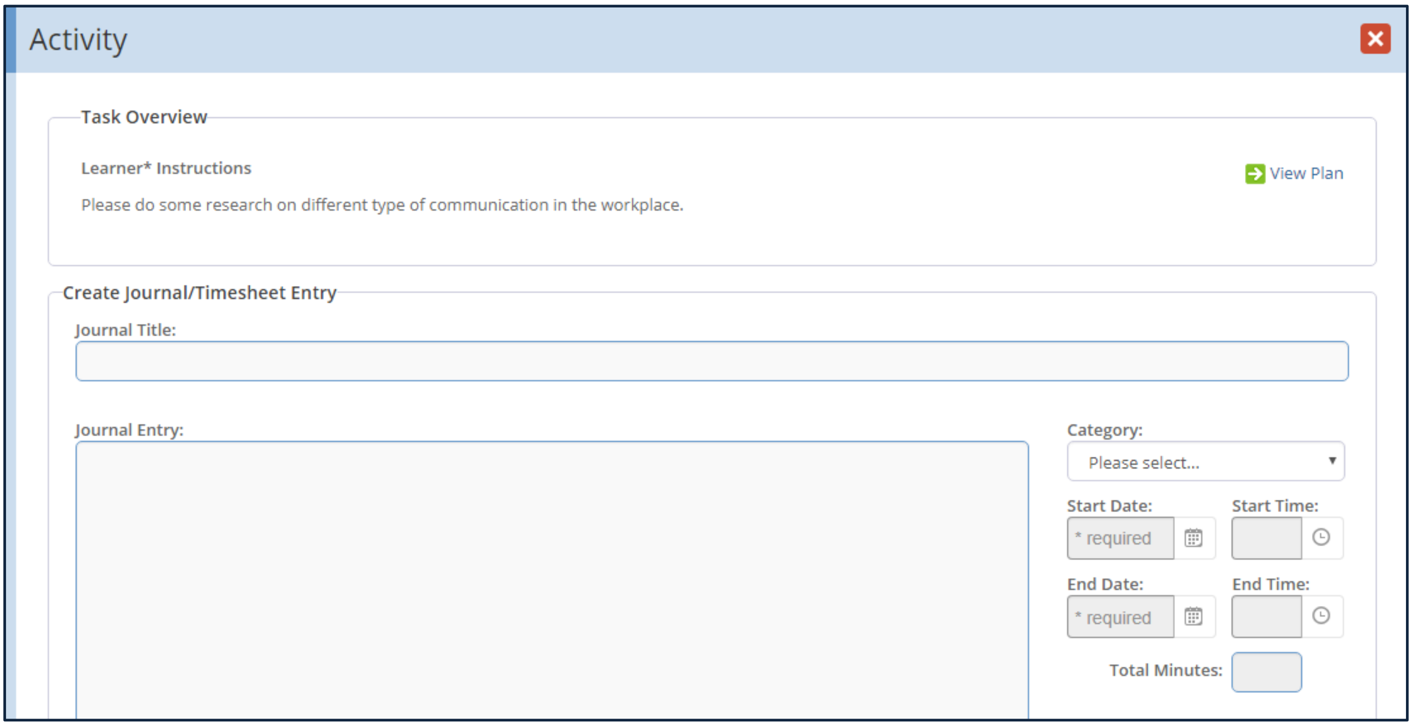
An **Activity Task** will not create an assessment and can be used as a reminder to perform an activity (e.g. revision or learning and development).

Use the drop-down list to change which user is going to start the task and then change the start/ due dates if necessary.

You can also click the **Attach** button to upload learning resources, or simply drag and drop the files onto the task.



When a user receives an activity task, it will be displayed in their task list. The user can optionally create a Journal entry and a timesheet entry directly from the activity task, as shown below!



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Assessment Tasks

To create an assessment task, click on the **Add Task** button and make sure you're on the **Assessment** tab.

Assessment Methods

The method will default to the first in the list that the learner can start. Feel free to click on the drop-down list and select the relevant method for the task.

Changing the method will determine which user could start the task. For example, if an "observation" is configured so that the "learner can't start", the learner option won't appear in the drop down list.

If the setting to allow "Employers to start assessments" is enabled and the learner has a default Employer, you will also be able to see the option to send the task to the Employer.

> **Note:** Methods can be created and customised by a Centre Manager. If you can't see a method in this drop down list, it either hasn't been created or isn't assigned to the learner's class.

Use Template (optional)

The drop-down list will only appear when you select a method, where assessment templates have been created, that also map to the learner's units. Selecting a template will automatically fill the task details.

Map Evidence

You will see the option to Map Evidence if the setting to use "per-criteria assessments" has been enabled.

Holistically – one area to add evidence, which maps to all the selected criteria.
Per-criteria – a separate area to map evidence to each individual selected criteria.

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Select Outcomes

The **Select Outcomes** page is designed to allow the Assessor to select which units, outcomes or criteria they are planning for the assessment to cover.

The following radio buttons are displayed at the top of the page to allow you to filter:

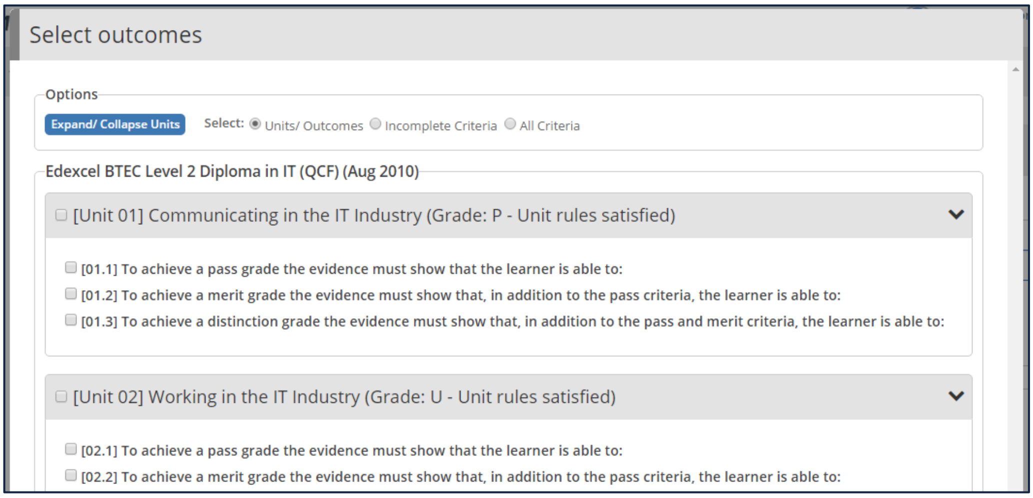
- Units/Outcomes
- Incomplete Criteria
- All Criteria

Units/Outcomes

A list of all units and outcomes the learner is currently working towards will be displayed.

Placing a tick in the unit title section means that you are planning for the assessment to cover the whole unit.

Placing a tick next to an individual outcome means that you are planning for the assessment to cover the specified learning outcomes.

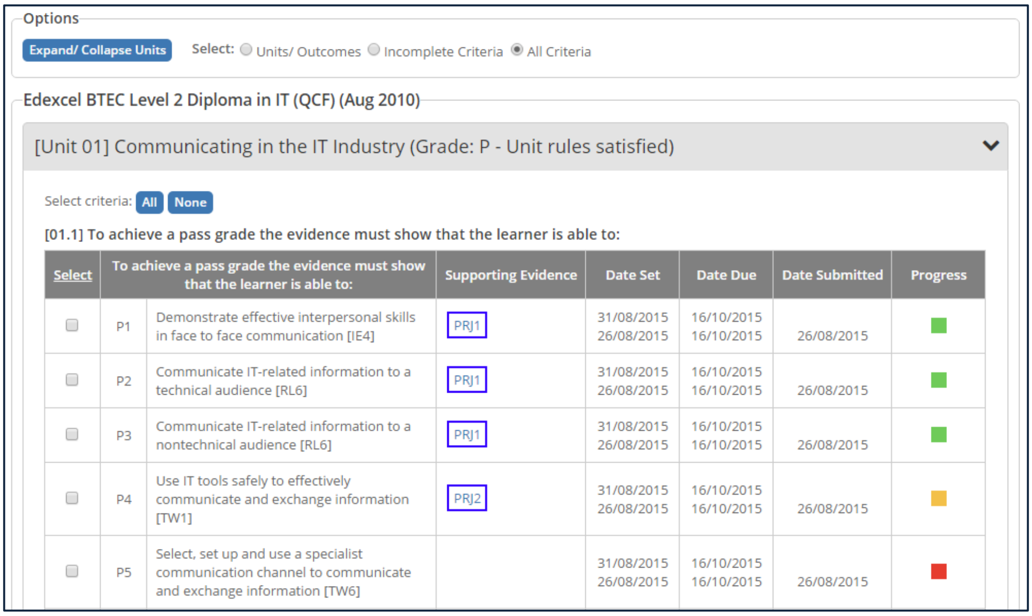


Incomplete Criteria

The "Incomplete Criteria" filter will display the learner's Gap Analysis. Only pending criteria or criteria yet to be covered will be shown in this view. You will not be able to see any criteria that has already been signed off.

All Criteria

The "All Criteria" page displays a full list of all criteria the learner is working towards, regardless of whether it has been completed or not.



Select		To achieve a pass grade the evidence must show that the learner is able to:	Supporting Evidence	Date Set	Date Due	Date Submitted	Progress
	P1	Demonstrate effective interpersonal skills in face to face communication [IE4]	PRJ1	31/08/2015 26/08/2015	16/10/2015 16/10/2015	26/08/2015	
	P2	Communicate IT-related information to a technical audience [RL6]	PRJ1	31/08/2015 26/08/2015	16/10/2015 16/10/2015	26/08/2015	
	P3	Communicate IT-related information to a nontechnical audience [RL6]	PRJ1	31/08/2015 26/08/2015	16/10/2015 16/10/2015	26/08/2015	
	P4	Use IT tools safely to effectively communicate and exchange information [TW1]	PRJ2	31/08/2015 26/08/2015	16/10/2015 16/10/2015	26/08/2015	
	P5	Select, set up and use a specialist communication channel to communicate and exchange information [TW6]		31/08/2015 26/08/2015	16/10/2015 16/10/2015	26/08/2015	

Criteria can be selected by ticking the corresponding box from the **Select** column.

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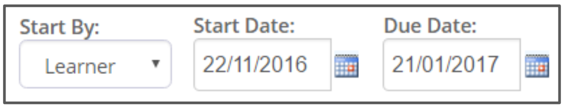
Start/Due Dates

The **Start Date** determines when the task will be generated.
For example, if you set it 2 weeks on from the date you created the plan, the task will only be shown on the date you have chosen.



The **Due Date** determines when the task will appear overdue.
For example, if you set this to a week from the **Start Date**, the task will appear in red if it hasn't been completed.

Attachments

Generic attachments can be added to the plan, but remember that it's now possible to attach learning resources to individual tasks!

Feedback & Comments

Feedback can be sent to the learner by typing into the **Feedback & Comments** box. The feedback will automatically be sent to the learner when you sign the plan.

Signatures

When the plan is finished, place a tick in the **Signed** column and click the **Save** button.

The learner will now receive a task, where they will be required to sign the plan to accept the tasks.

Signatures

Signed in agreement	Name	Signed	Date
Learner			
Assessor	Trish Edwards		22/11/2016 09:16:28
Internal Verifier			
External Verifier			

Once signed by the learner, any tasks due to be started will appear for the relevant users.

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