



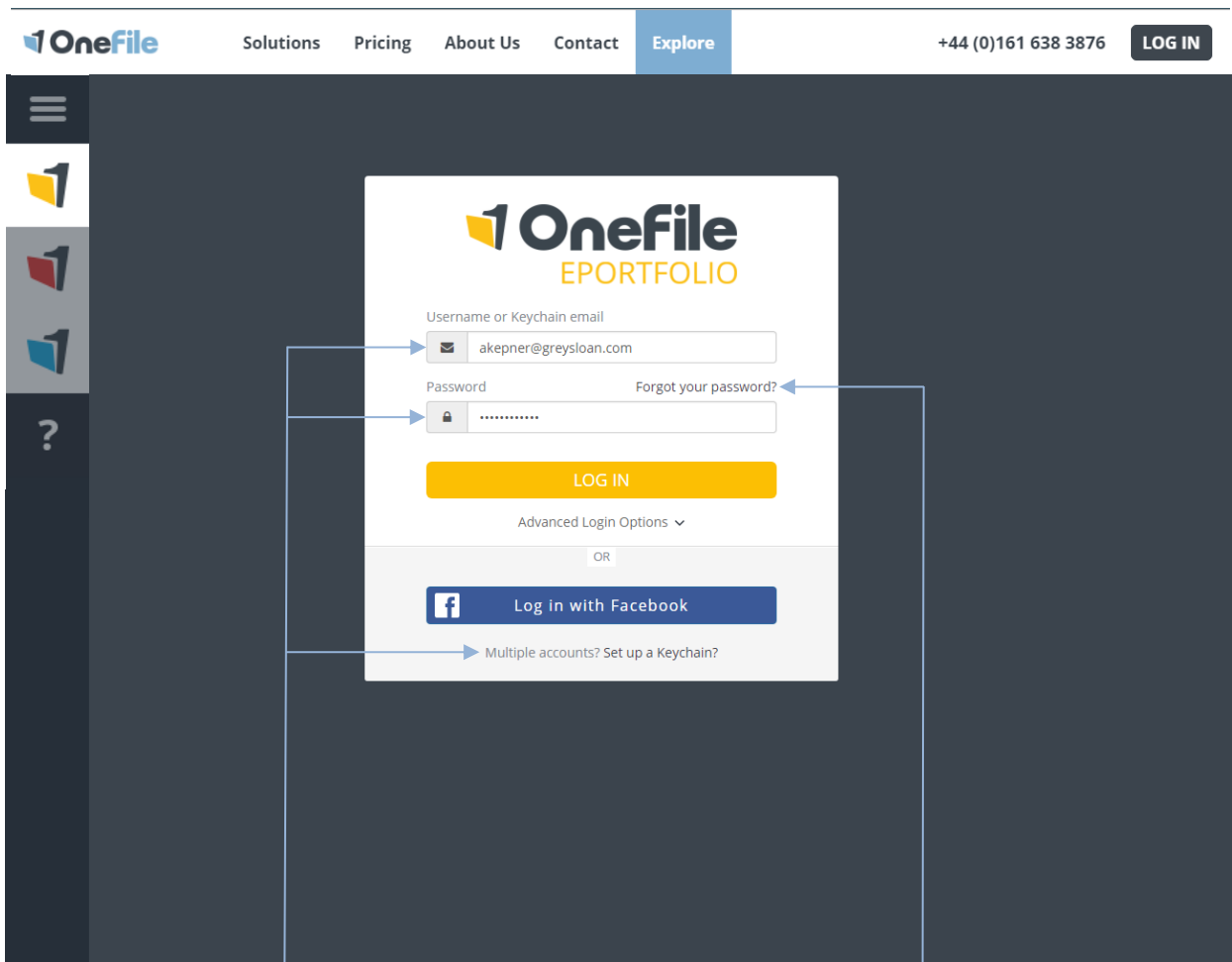
TRAINING & ASSESSMENT EPORTFOLIO

# Assessor Induction Guide



# Logging into your Account

To login, navigate to <http://www.onefile.co.uk/> then select the "Login" button located within the top right hand of the homepage. Within the login page, please enter your OneFile log in credentials within the Username and Password fields. The details are case sensitive so they need be typed exactly as displayed.



Enter your Username or Keychain email and password here, then select Login. Ensure that you select 'Live OneFile' within 'Advanced Login Options'.

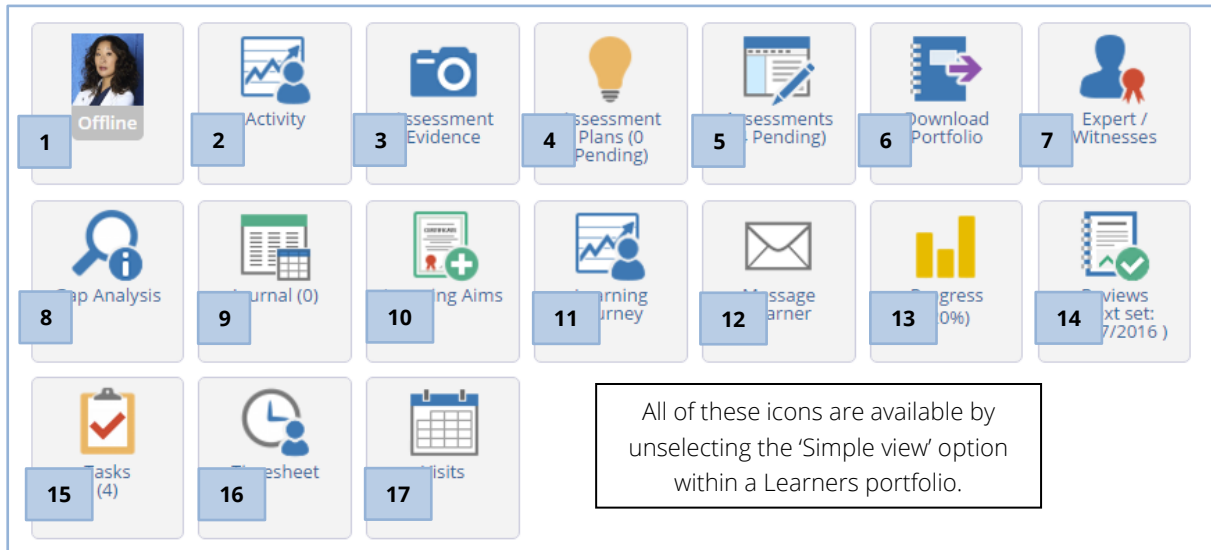
If you are unable to login, you can request a new password by clicking onto the 'Lost password' button or contacting your centre manager.

# Homepage Icons

The screenshot shows the Onefile homepage dashboard. It includes a 'Filter Learners' section with dropdowns for 'Class' and 'Name', and checkboxes for 'Show my learners only' and 'Show archived learners'. There are two circular progress indicators: 'Learners last logged in' and 'Learners on target'. The 'Learners on target' indicator has a legend: Green for 'Ahead of target', Amber for 'On target', and Red for 'Behind target'. An 'Upload' button is located in the top right. Below these is a table with columns: Learner, Main Learning Aim, Progress (Target)%, Anticipated Completion Date, Target Deviation, Next Review Date, Units Signed Off, Tasks, and Portfolio Options. A learner entry for 'Yang, Christina' is shown with a profile picture, episode name, medical number, and an 'Offline' status. The progress bar shows 20% (23%) with a green bar and a red bar. The target deviation is -3%. The next review date is 19/07/2016. The units signed off are 0/2. The tasks column shows 4 tasks. Portfolio options include Assessments, Plans, and Gap Analysis.

|    |   |     |  |
|----|---|-----|--|
| 1. | Filter the learners by class.   | 7.  | See if the learner is on target.<br><b>Green</b> – on target.<br><b>Amber</b> – slightly behind target.<br><b>Red</b> – behind target. |
| 2. | Type in the learner's name to search for their account quicker.   | 8.  | Be able to view tasks that have been allocated to learners.  |
| 3. | Tick this to view only the learners you are the default Assessor for.   | 9.  | The class name that the learner is assigned too.   |
| 4. | Click on the learner's name to access their portfolio.  | 10. | See the number of units that have been signed off.   |
| 5. | View the learner's main learning aim.   | 11. | View and upload any documents onto your Account.   |
| 6. | See the learner's current progress ( <b>green</b> ) and target progress ( <b>red</b> ) in percentage form.<br>The learner's actual progress is the bolded number on the left. |     |  |

# Portfolio Icons



|    |   |     |   |
|----|---|-----|---|
| 1. | The learner's profile.  | 10. | View and/or select learner's "Learning Aims", "Units" and "Unit Dates".               |
| 2. | View all activity that has happened within the learner's portfolio.         | 11. | View a graph which shows the learner's progress alongside their completed activities. |
| 3. | View or upload evidence for the learner.                                    | 12. | Send the learner a message.   |
| 4. | View or create Assessment Plans.  | 13. | View the learner's completed progress.  |
| 5. | View or create Assessments.   | 14. | View completed reviews and schedule/start reviews.                                    |
| 6. | Download a ZIP folder copy of the learner's portfolio.                      | 15. | View incomplete "Tasks" sat with the learner.   |
| 7. | Create or view any Expert or Witnesses assigned to the learner's portfolio. | 16. | Logged time spent with the learner.   |
| 8. | View Assessment gaps within the learner's portfolio.                        | 17. | View visits that you have arranged with the learner.                                  |
| 9. | Read comments within the learner's journal.                                 |     |   |

# How to create an Assessment Plan

1 Pending

Create an Assessment Plan of teaching, learning & development

Plans

**Create Assessment Plan**

Click on the 'Plans' icon. This can be found underneath the learners 'Information & Options' heading.

Click on the 'Create Assessment Plan' button.

Assessment Plan

This Assessment Plan / Visit

Title:

Date:  Type:  Remote session  Face-to-face visit

Set Next Planned Visit

New visit  Existing visit

Date:  Type:  Remote session  Face-to-face visit Location:

Start:  End:

The Assessment Plan title. The title can be edited to be more specific.

Plan a next visit with the Learner by keeping the check box ticked. If you uncheck this box, the section will collapse.

Tasks

Activity tasks & Assessments listed here will be generated when the learner signs the plan. Tasks set in the future will only appear when the Start Date is reached.

No tasks set

**Add Task**

Click 'Add Tasks' to create assessment or activity tasks for the learner.

Tasks

Activity tasks & Assessments listed here will be generated when the learner signs the plan. Tasks set in the future will only appear when the Start Date is reached.

No tasks set

Set as assessment task:

Started by:  Learner  Assessor

**Select outcomes:**

Description of task:

Start date:  **Save** **Cancel**

Due date:

Holistic assessment  Per-criteria assessment

Holistic - A single text box to answer all the questions within the assessment.

Pre-Criteria - Separate answer boxes below each question within the assessment.

Pick who you would like to start the assessment. This user will be able to add the criteria and evidence to the assessment plan once generated.

Click 'Select Outcomes' to assign assessment criteria onto this assessment plan.

Add in a text description of the task(s).

The start date is when this task will be generated.

The due date is when the task is classed as 'overdue'. The task will appear red after this date.

### Attachments

Nothing is attached

Select the green paperclip icon to attach supporting guidance.

### Feedback & Comments

Feedback to Learner:

Words: 0 Characters: 0

Create task to acknowledge this feedback

Add feedback and comments onto the assessment plan.

These comments will be automatically sent to the learner once you have signed the plan.

By selecting this tick box, the learner will receive a task to acknowledge the feedback entered.

### Issues Arising

Record any issues arising.

### Signatures

| Signed in agreement | Name           | Signed                              | Date                |
|---------------------|----------------|-------------------------------------|---------------------|
| Learner             | Christina Yang | <input type="checkbox"/>            |                     |
| Assessor            | Derek Shepherd | <input checked="" type="checkbox"/> | 13/07/2016 14:16:26 |
| Internal Verifier   |                | <input type="checkbox"/>            |                     |
| External Verifier   |                | <input type="checkbox"/>            |                     |

Save Delete Cancel

When the Assessment Plan is complete, tick the sign on completion box.

Once the Assessment Plan has been saved the learner will receive a Task to accept or reject the Assessment Plan.

# Adding Criteria to an Assessment Plan

## Units/Outcomes:

Options  
 Select:  Units/ Outcomes  Incomplete Criteria  All Criteria

Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010)

[Unit 1] Paediatric Emergency First Aid (Progress 45% - Unit rules satisfied)

[1.1] Understand the role of the paediatric first aider

[1.2] Be able to assess an emergency situation and act safely and effectively

[1.3] Be able to provide first aid for an infant and a child who is unresponsive and breathing normally

Allows you to select the "Units/Outcomes" that you would like the assessment task to cover.

This option does not select the individual pieces of criteria.

## Incomplete Criteria:

Options  
 Select:  Units/ Outcomes  Incomplete Criteria  All Criteria

Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010)

[Unit 1] Paediatric Emergency First Aid (Progress 45% - Unit rules satisfied)

Select criteria:

[1.4] Be able to provide first aid for an infant and a child who is unresponsive and not breathing normally

| Select                              | Assessment Criteria   | Supporting Evidence | Progress                           |
|-------------------------------------|---|---------------------|------------------------------------|
| <input checked="" type="checkbox"/> | 4.1 identify when to administer CPR to an unresponsive infant and an unresponsive child who is not breathing normally |                     | <span style="color: red;">■</span> |
| <input type="checkbox"/>            | 4.2 demonstrate how to administer CPR using an infant and a child manikin   |                     | <span style="color: red;">■</span> |
| <input type="checkbox"/>            | 4.3 describe how to deal with an infant and a child who is experiencing a seizure                                     |                     | <span style="color: red;">■</span> |

This will bring up a gap analysis view of the learner's outcomes/criteria that haven't been covered.

Add a tick into the box to select the criteria and click the 'Continue' button to add it to the assessment plan task.

## All Criteria:

Options  
 Select:  Units/ Outcomes  Incomplete Criteria  All Criteria

Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010)

[Unit 1] Paediatric Emergency First Aid (Progress 45% - Unit rules satisfied)

Select criteria:

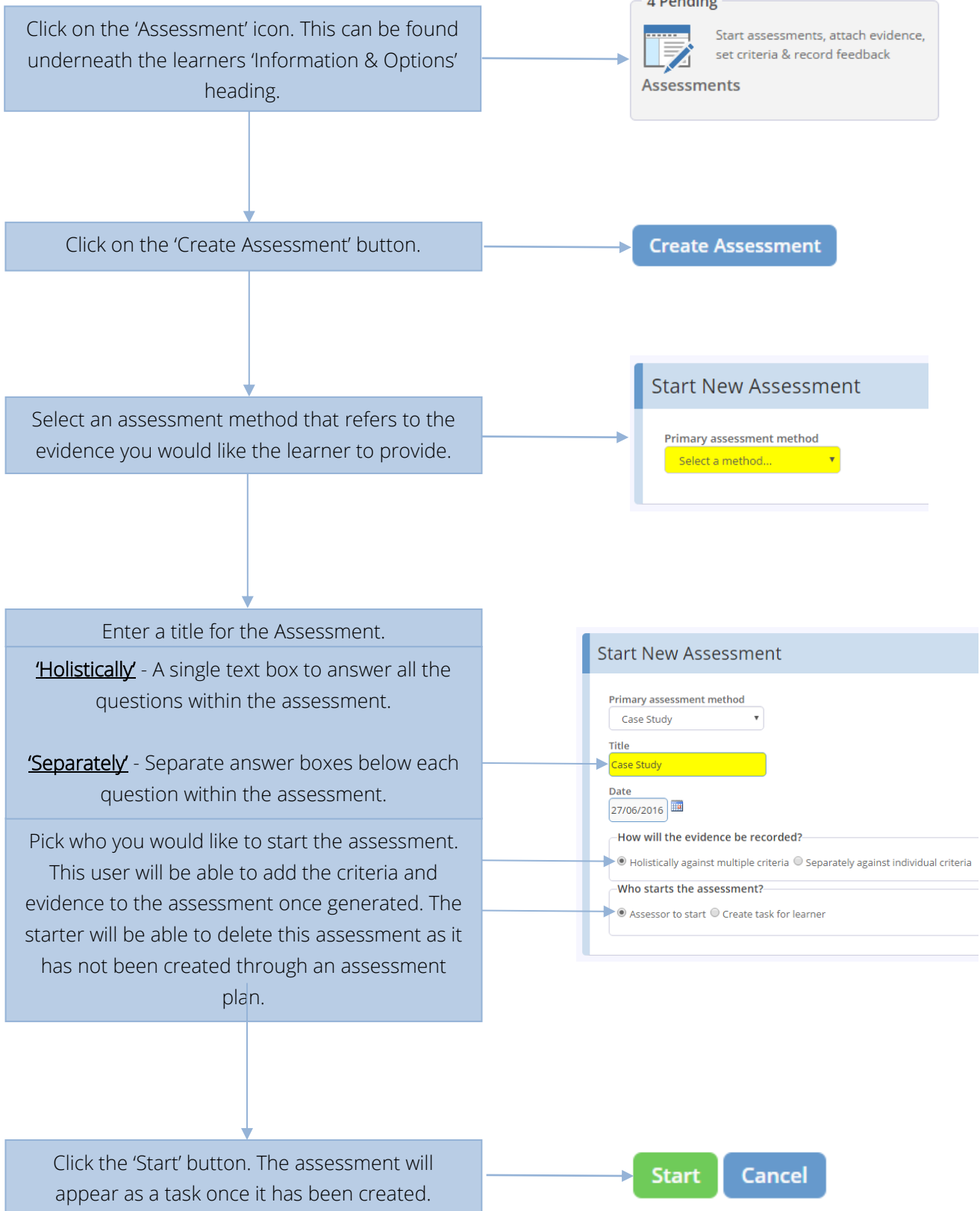
[1.1] Understand the role of the paediatric first aider

| Select                   | Assessment Criteria  | Supporting Evidence              | Progress                             |
|--------------------------|--|----------------------------------|--------------------------------------|
| <input type="checkbox"/> | 1.1 identify the responsibilities of a paediatric first aider  | <input type="text" value="OB1"/> | <span style="color: green;">■</span> |
| <input type="checkbox"/> | 1.2 describe how to minimise the risk of infection to self and others  | <input type="text" value="OB1"/> | <span style="color: green;">■</span> |
| <input type="checkbox"/> | 1.3 describe suitable first aid equipment, including personal protection, and how it is used appropriately     | <input type="text" value="OB1"/> | <span style="color: green;">■</span> |
| <input type="checkbox"/> | 1.4 identify what information needs to be included in an accident report/incident record, and how to record it | <input type="text" value="OB1"/> | <span style="color: green;">■</span> |

This will bring up a gap analysis view of all the learners outcomes/criteria within their qualification(s).

Add a tick into the box to select the criteria then click the 'Continue' button to add it to the assessment plan task.

# How to create an Assessment





| Primary Method | Reference | Title      | Date       |
|----------------|-----------|------------|------------|
| Case Study     | CS1       | Case Study | 27/06/2016 |

Criteria

As this is an 'Assessor started' assessment, you can add criteria to the assessment.

Evidence

Times Ne... 16px A B / U Import Word Document

Words: 0 Characters: 0

Written evidence can be added here including word documents which can be imported.

Evidence Attachments

Nothing is attached

You can attach uploaded evidence files via the paperclip icon.

| Visit Type    | Assessor Travel Time (minutes) | Assessor Assessment Time (minutes) | Learner Assessment Time (minutes) |
|---------------|--------------------------------|------------------------------------|-----------------------------------|
| Not specified | 0                              | 0                                  | 0                                 |

Declaration & Signatures

Only sign here when you have finished with this assessment and wish to send it to the next person.

| Declaration   | Name                      | Signed on Completion                | Date             |
|---|---------------------------|-------------------------------------|------------------|
| I agree that the information provided here is an accurate account of what has taken place | Christina Yang (Learner)  | <input type="checkbox"/>            |                  |
| I agree that the information provided here is an accurate account of what has taken place | Derek Shepherd (Assessor) | <input checked="" type="checkbox"/> | 15/07/2016 14:49 |
| I have sampled this evidence as part of my verification sample                            | Internal Verifier         | <input type="checkbox"/>            |                  |
|   | External Verifier         | <input type="checkbox"/>            |                  |

Save & Refresh Save & Quit Delete Cancel

It is beneficial to save assessments on a regular basis whilst working on them. This will confirm that all information inputted will be saved and can be amended at a later date.

When the assessment is complete, tick the sign on completion box. Clicking 'Save & Quit' after signing will send it to your learner to declare and sign.

# Uploading Evidence

Click the 'Upload' icon located within the 'Learner Dashboard' heading of your homepage.



**Upload**

Upload files and manage files from mobile devices

Clicking on 'Select files' will allow you to select a file from your PC.

When you've selected the file, click 'Open' to confirm. The file will then be uploaded to OneFile.

Once uploaded, the evidence will appear in a table of content highlighted. This will allow you to change or save the title.

| Select                              | Description | Document Type                    | Size (KB) | Date Created     | Date Last Modified | Options |
|-------------------------------------|-------------|----------------------------------|-----------|------------------|--------------------|---------|
| <input checked="" type="checkbox"/> | UG17        | Microsoft Word Open XML Document | 663       | 18/07/2016 13:12 | 18/07/2016 13:12   |         |

To save the information, click the disk icon. The file's data will turn white when saved.

| Select                              | Description | Document Type                    | Size (KB) | Date Created     | Date Last Modified | Options |
|-------------------------------------|-------------|----------------------------------|-----------|------------------|--------------------|---------|
| <input checked="" type="checkbox"/> | UG17        | Microsoft Word Open XML Document | 663       | 18/07/2016 13:12 | 18/07/2016 13:16   |         |

If you are unable to locate evidence uploaded from the OneFile App within the learner's "Evidence" section, it may have been synced through to your uploaded evidence section.

# Reviews

To plan a learner's review, click into the learner's portfolio and click the 'Reviews' button within the 'Information and Options' heading.

**None scheduled**

Schedule, start and complete learner progress reviews

**Reviews**

### Schedule New Review

New visit  Existing visit

**1**  Remote session  Face-to-face visit

**2** Date:  **3** Type:

**4** Location:

**5** Start:  **6** End:

Assessor:  **Create**

|           |  |           |   |
|-----------|--|-----------|---|
| <b>1.</b> | Whether this is a 'new' or 'existing' visit.   | <b>4.</b> | Location. Enter if you are planning a face-to-face visit. |
| <b>2.</b> | Date of the visit in which the review will take place.                                 | <b>5.</b> | Start and end times of the visit.                         |
| <b>3.</b> | Visit type. Whether the review be completed remotely or face-to-face with the learner. | <b>6.</b> | The Assessor that will be completing the review.          |

To start a review, click the 'Start' button within the reviews table.

**Options**

**Start** **Delete**

| Actual Review Date                                       | Scheduled Review Date  | Last Review Date                        | LSF  |
|--|--|---|--|
| <input type="text" value="19/07/2016"/> <b>Set today</b> | <input type="text" value="19/07/2016"/> <input type="text" value="13:15"/> | <input type="text" value="23/05/2016"/> | <input type="text" value="Not specified"/> |

The actual review date defaults to the date that you click the start button.

Selecting the 'Set today' button will reset the date and recalculate the progress.

This is the date the review is scheduled for.

This field will display the date of the previous review.

If this is the learner's first review the field will be blank.

If the learner has any 'Learner Supported Funds', the information will appear here.

For more information about reviews [click here](#).

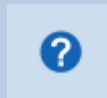
# Help and Support

## Technical Support at OneFile:

Call – 0161 638 3876

Email – [support@onefile.co.uk](mailto:support@onefile.co.uk)

Our office is open between 8am – 6pm, Monday – Friday (excluding Bank Holidays).



By clicking the 'Help' icon you will be able to view videos or user-guides relating to the page in question. This icon is available in the top right corner of every page in your portfolio.

### User Guides

- Creating your own assessments
- Learner Induction Guide
- Learner Induction Video

→ Search all user guides

Clicking these links will bring you to all the knowledge-based articles relating to OneFile.

→ Book free online training

Clicking this icon will allow you to book on an online learner webinar. Webinars are online training sessions covering different areas of OneFile and are hosted by members of the Technical Support Team. You will have the opportunity to ask questions and seek guidance.

→ Contact OneFile

Send an email to the OneFile Support Team for help regarding technical enquires.