

Public Health Practitioner Registration Support Scheme

E-Portfolio User Guide for Assessors

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Public Health Practitioner Registration Support Scheme

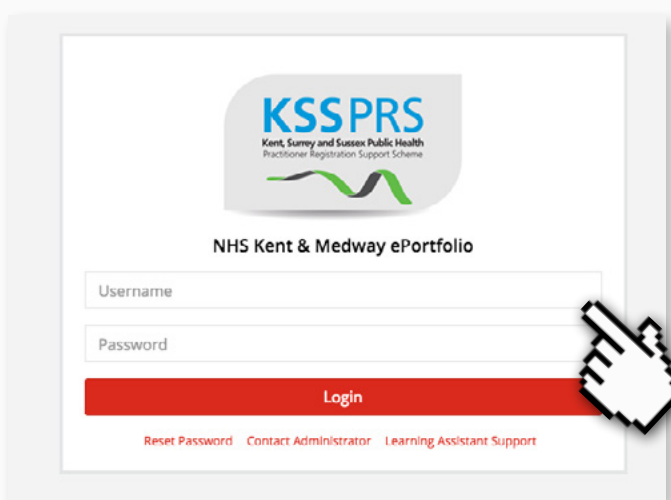
E-Portfolio User Guide for Assessors

1. Logging in

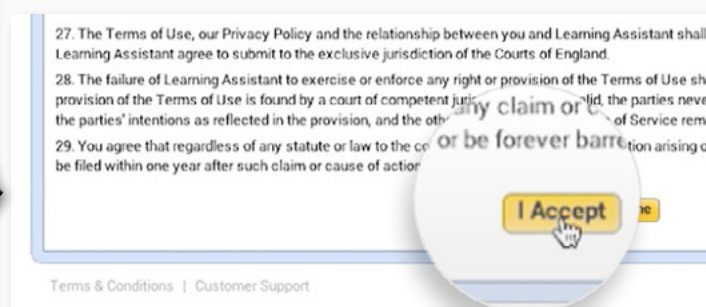
STEP 1 Type the address for **your local site** into your website browser and login using the username and password you have been given. If you are unsure of the link you require please contact your scheme coordinator.

<https://system.learningassistant.com/yourlocal site>

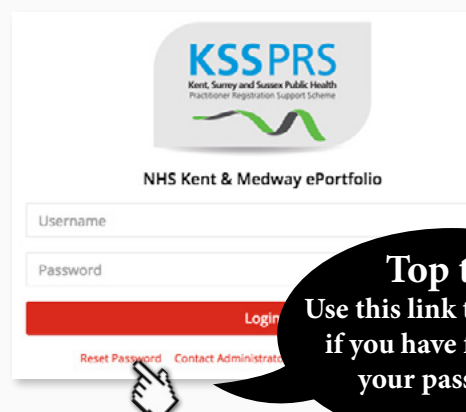
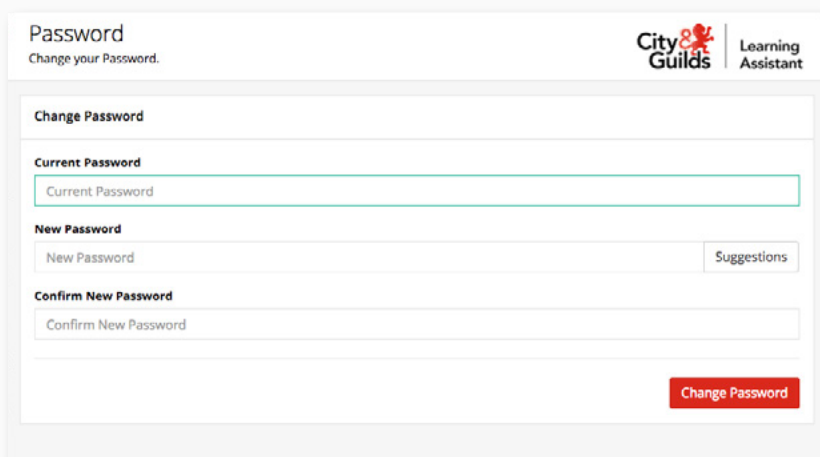
Top tip!
Save the web address to your favourites to make it easy to find.



STEP 2 Accept the Terms & Conditions.



STEP 3 Change your password to something secure and memorable. Please note the password is case sensitive.



Top tip!
Use this link to help you if you have forgotten your password.

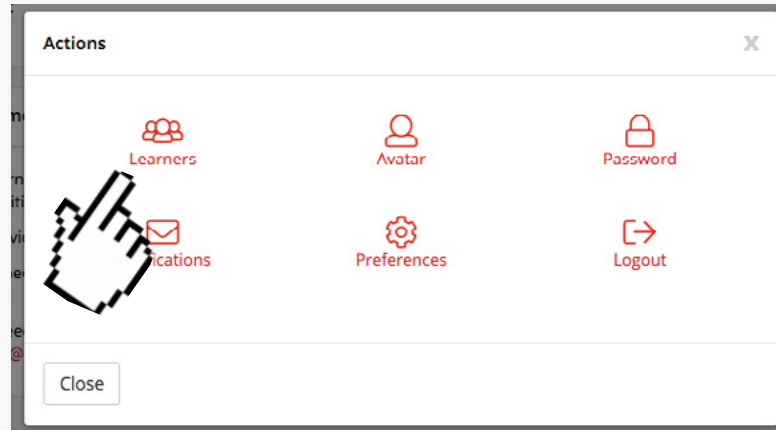
2. Finding your practitioner

STEP 1a Find your practitioner

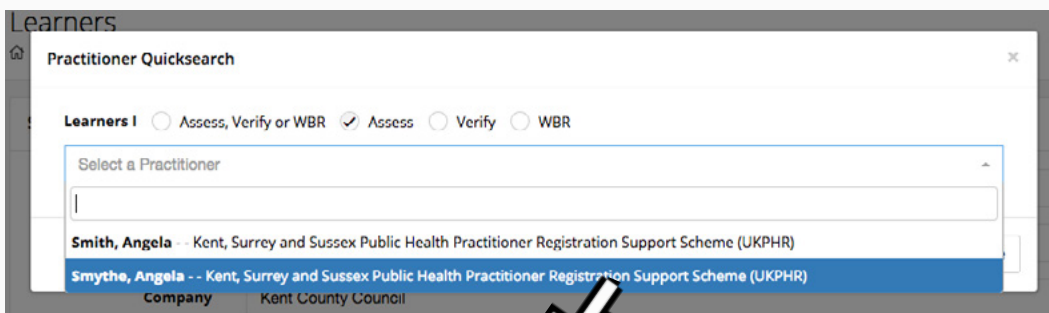
To locate the practitioner's portfolio, click on the **Settings icon** (located by your profile picture).



STEP 1b Click on Learners in the Actions panel



This will open up the **Quicksearch** functionality



STEP 1c Click on the practitioner's whose portfolio you wish to see.

This will open their portfolio at the course folder.

Angela Smythe
Kent County Council (Practitioner)
angela.smythe@kcc.gov.uk
UKPHR - Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme

Assessors: Jane Smith
Verifiers: Lewis Riggs

Started 35% | Completed 21% | Expected 100%

Official Start Date: 31 Jul 2015 | Anticipated End Date: 30 Apr 2016 | Last Login: 31 Mar 2016 12:34

Course: Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (Incomplete)

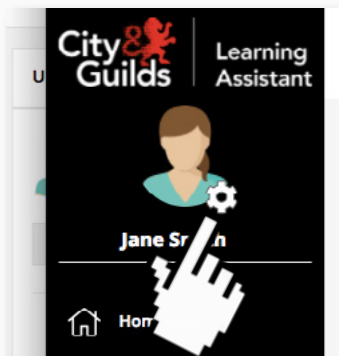
01

01 - Area 1 Professional and ethical practice	STARTED
> 01.1a - 1a Recognise and address ethical dilemmas and issues – demonstrating knowledge of existing and emerging legal and ethical issues in own area of practice Total Docs: 3	Started
> 01.1b - 1b Recognise and address ethical dilemmas and issues – demonstrating the proactive addressing of issues in an appropriate way Total Docs: 0	Not Started

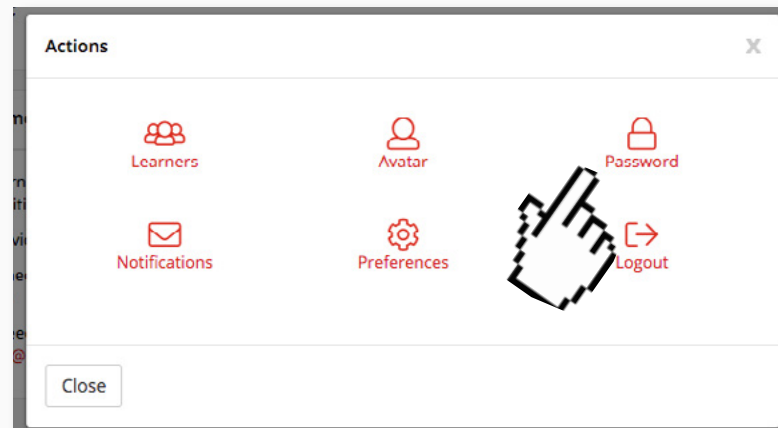
3. Changing your password and uploading your picture

As well as being prompted to change your password when you first log in, you have the ability to update it at any time whilst logged in to the e-portfolio system.

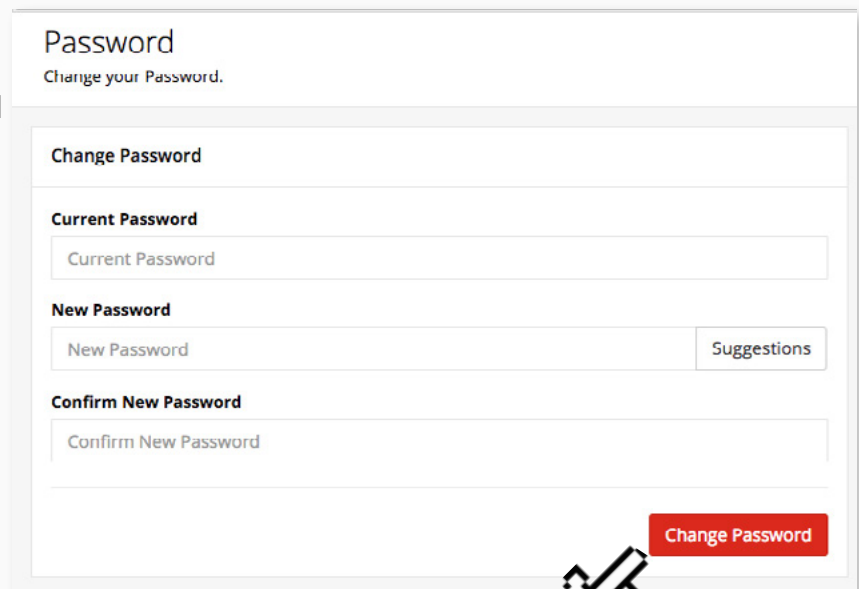
STEP 1a To change your password, click the **Settings icon**



STEP 1b Click on **Password** in the Actions panel to open the password change tool



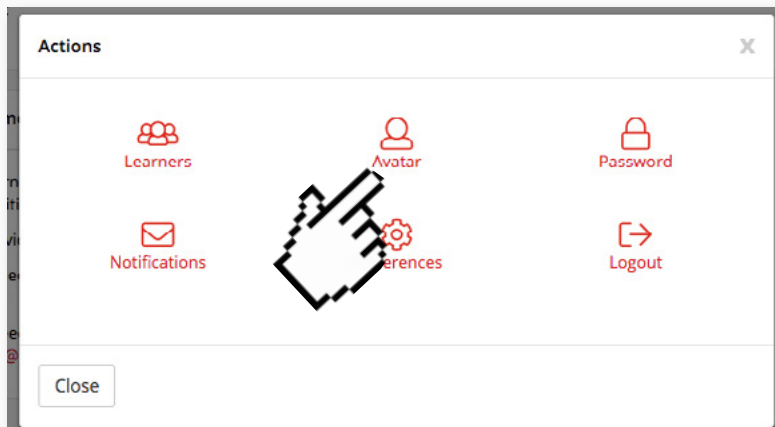
STEP 1c Update your password by entering your existing password, followed by your new password and then confirming it.

A screenshot of the 'Password' change form. The title is 'Password' and the subtitle is 'Change your Password.'. The form has three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. There is a 'Suggestions' button next to the 'New Password' field. At the bottom right, there is a red 'Change Password' button. A hand cursor is pointing to this button.

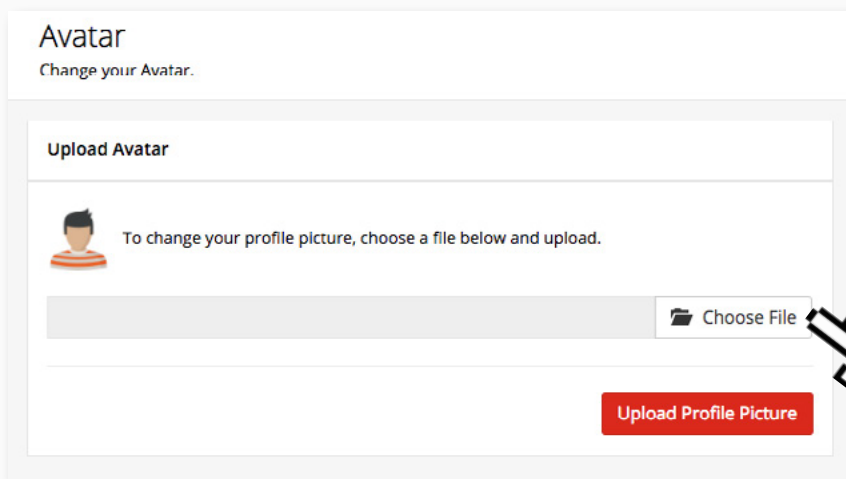
STEP 1d To complete the process click the **Change Password** button.

Learning Assistant also allows the you to add your photo to the e-portfolio.

STEP 2a From the same Actions panel, click on **Avatar**



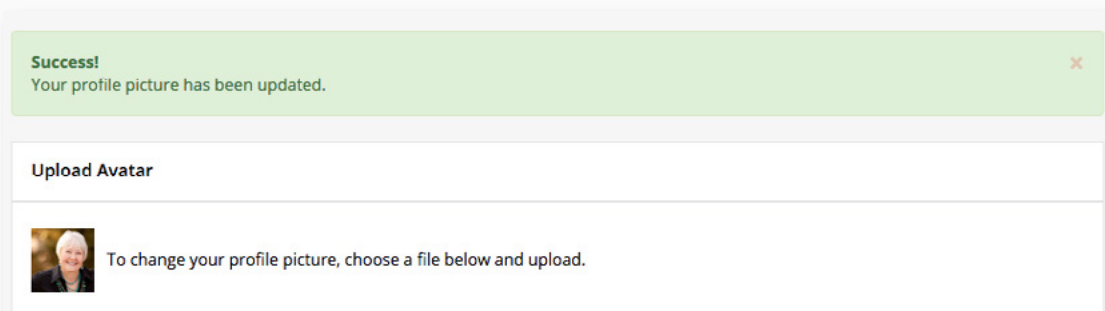
This will open a tool to change your avatar.



STEP 2b To upload a photograph click the **Choose File** button and select the photograph you wish to use from your PC.

STEP 2c Then click **Upload Profile Picture**.

Once the picture has uploaded, you'll see a success message and your new picture will show in the box.

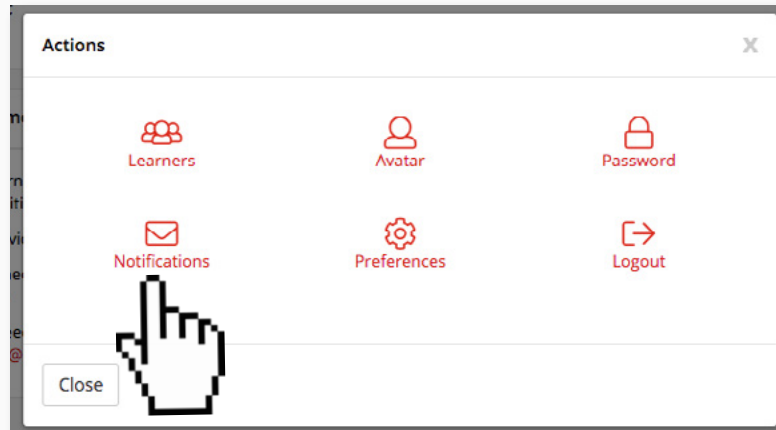


Once you close the tool you will see your new profile picture has been added across your account.

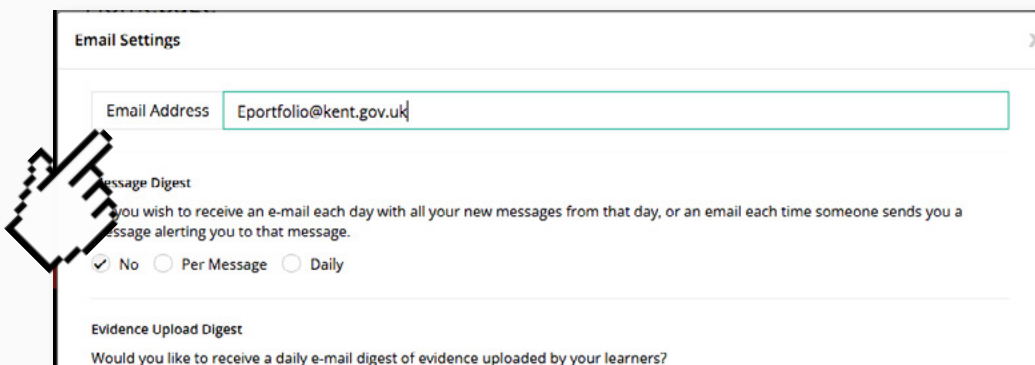
4. Setting up email notifications

Notifications can be sent to an email address of your choice to prompt you when work has been submitted and awaiting assessment.

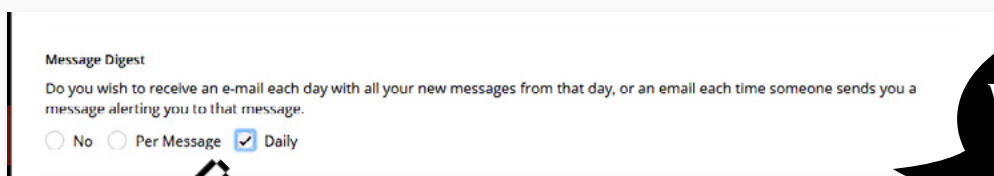
STEP 1 Click on **Notifications** from the Actions panel



STEP 2b Fill in the email address you want the notifications to be sent to.



STEP 2c Scroll down and select how often you'd like to receive alerts under the **Message Digest** section.



Top tip!
We recommend that you choose to receive daily notifications.



The message digest lets you know when your practitioner has sent you a message in the e-portfolio system.

STEP 2d Scroll down to the bottom of the window to the **Candidate Submit Digest** and select how often you'd like to receive alerts (you'll notice there are other 'digests' in the list - as these are not required they can be left).

Candidate Submission Digest
Do you wish to receive an e-mail each day with all your new candidate submissions from that day, or an email each time a candidate submits something for you.

No Daily Per Entry



Again, it is recommended to click daily. The daily email will contain a list of practitioners who have uploaded new evidence for assessment that day.

By electing to receive an alert, you will receive an email notifying you when any of your practitioners submit any new commentaries or supporting evidence documents for assessment.

STEP 2e Click on **Save Email Settings** to confirm your choices.

Candidate Submission Digest
Do you wish to receive an e-mail each day with all your new candidate submissions from that day, or an email each time a candidate submits something for you.

No Daily Per Entry

Close Save Email Settings



5. Downloading the assessment log

One of the real benefits of the e-portfolio is that the Assessment Log is compiled automatically. All that remains is for you to download and review it.

Step 1a

From the list choose the Practitioner whose Assessment Log you wish to see.

Learners | Assess, Verify or WBR Assess Verify WBR

Select a Practitioner

Smith, Angela - - Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (UKPHR)

Smythe, Angela - - Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (UKPHR)

Company Kent County Council

Step 1b

Click on **Assessment Log** in the top section.

City & Guilds Learning Assistant

Kent County Council

Angela Smythe (Practitioner)

UKPHR - Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme

Started 35% Completed 21% Expected 100%

Official Start Date: 31 Jul 2015 Anticipated End Date: 30 Apr 2016 Last Login: 31 Mar 2016 12:34

Assessors: Jane Smith

Verifiers: Lewis Riggs

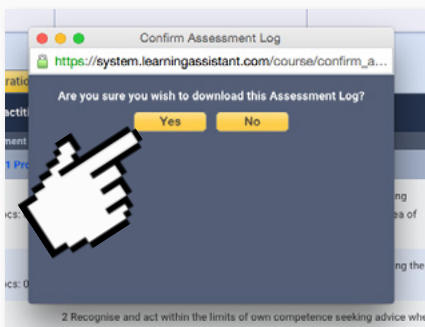
Course Evidence Registration Contact Reviews Metrics PDR Journey

Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (Incomplete)

A pop up window will appear asking for permission to download the Assessment Log.

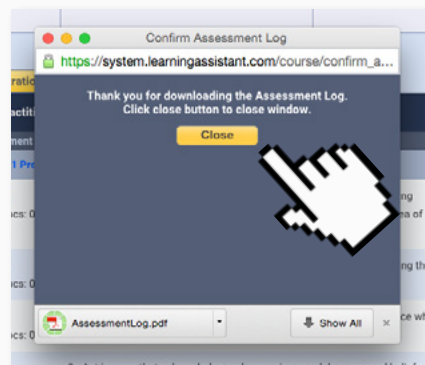
Step 1c

Click **Yes** to download the Assessment Log PDF to your computer for review.



Step 1d

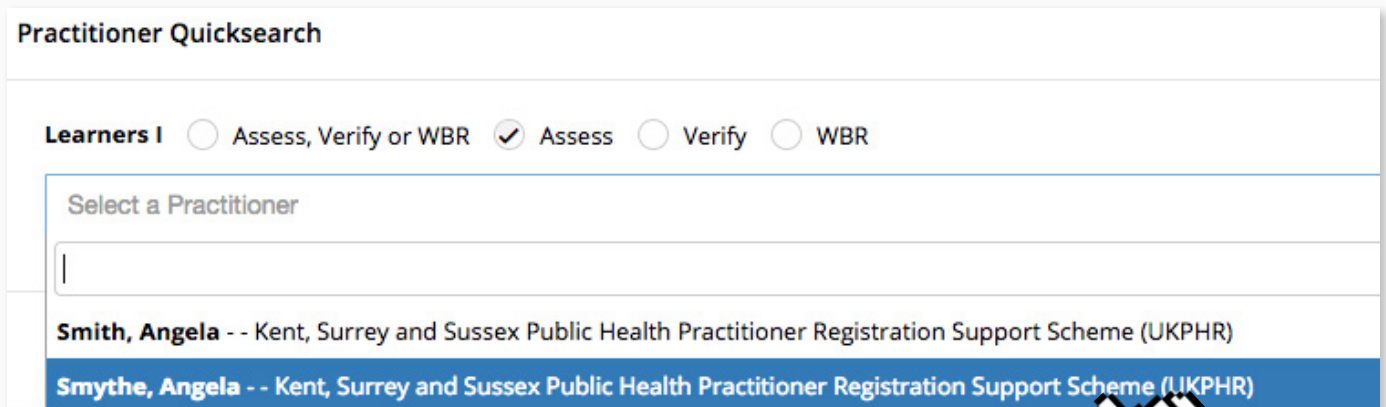
Once downloaded you will see this pop up window confirming the download. Click **Close** to complete the process.



6. Navigating a practitioner's course folder

In the e-portfolio, each Practitioner has a Course Folder which displays all 12 standards and their associated indicators. Additional sections are also listed in the Course Folder for: Supporting Documents (for example, a CV and Job Description); as well as any required Application Forms and Contracts.

1a To locate the practitioner's portfolio, go to the **Quicksearch** functionality (under the Setting icon / click on Learners) and then click on the practitioner you wish to assess..



Practitioner Quicksearch

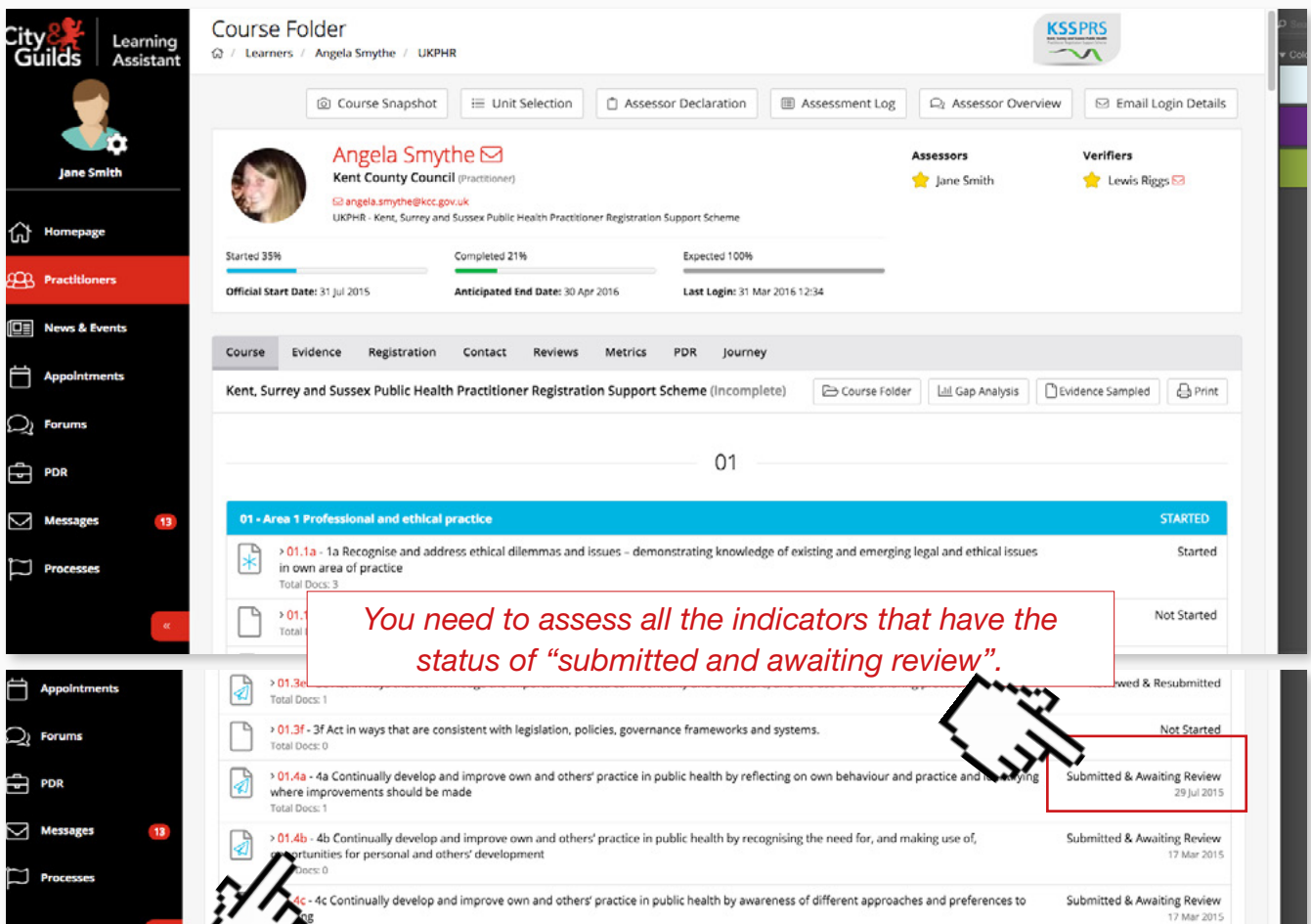
Learners | Assess, Verify or WBR Assess Verify WBR

Select a Practitioner

Smith, Angela -- Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (UKPHR)

Smythe, Angela -- Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (UKPHR)

The practitioner's e-portfolio will open at the Course Folder page.



Course Folder

City Guilds Learning Assistant

Jane Smith

Angela Smythe (Practitioner)

Kent County Council

angela.smythe@kccc.gov.uk

UKPHR - Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme

Started 35% Completed 21% Expected 100%

Official Start Date: 31 Jul 2015 Anticipated End Date: 30 Apr 2016 Last Login: 31 Mar 2016 12:34

Assessors: Jane Smith

Verifiers: Lewis Riggs

Kent, Surrey and Sussex Public Health Practitioner Registration Support Scheme (Incomplete)

01

01 - Area 1 Professional and ethical practice STARTED

Indicator	Status
> 01.1a - 1a Recognise and address ethical dilemmas and issues - demonstrating knowledge of existing and emerging legal and ethical issues in own area of practice Total Docs: 3	Started
> 01.1b - 1b Recognise and address ethical dilemmas and issues - demonstrating knowledge of existing and emerging legal and ethical issues in own area of practice Total Docs: 0	Not Started
> 01.3e - 3e Recognise and address ethical dilemmas and issues - demonstrating knowledge of existing and emerging legal and ethical issues in own area of practice Total Docs: 1	Reviewed & Resubmitted
> 01.3f - 3f Act in ways that are consistent with legislation, policies, governance frameworks and systems. Total Docs: 0	Not Started
> 01.4a - 4a Continually develop and improve own and others' practice in public health by reflecting on own behaviour and practice and making where improvements should be made Total Docs: 1	Submitted & Awaiting Review 29 Jul 2015
> 01.4b - 4b Continually develop and improve own and others' practice in public health by recognising the need for, and making use of, opportunities for personal and others' development Total Docs: 0	Submitted & Awaiting Review 17 Mar 2015
> 01.4c - 4c Continually develop and improve own and others' practice in public health by awareness of different approaches and preferences to Total Docs: 0	Submitted & Awaiting Review 17 Mar 2015

You need to assess all the indicators that have the status of "submitted and awaiting review".

STEP 1b To begin the process of assessment **click on the relevant indicator** from the Course Folder.

You will then see a page containing the work uploaded by the practitioner.

In every single indicator being submitted for assessment there's usually at least two documents - a Commentary and an Evidence document.

RESOURCE	TYPE
01	Guidance

Evidence	Type(s)	IV	4e
commentary	C	<input type="checkbox"/>	!
evidence	P	<input type="checkbox"/>	!

STEP 1d To open the commentary, click on the file name. The file will automatically be downloaded to your PC.

Evidence	Type(s)	IV	4e
commentary	C	<input type="checkbox"/>	!
evidence	P	<input type="checkbox"/>	!

STEP 1d Similarly, to open the Evidence, click on evidence file and wait for it to download. Then open the evidence to assess whether it supports the indicator being claimed.

Top tip!

All original evidence files are protected. This allows any changing or editing to take place safe in the knowledge that originals will remain unchanged.

7. Making an assessment decision

Once the Commentaries and Evidence have been reviewed, you can make an Assessment Decision based upon whether the work uploaded adequately meets the indicator being claimed.

For each individual indicator there are four assessment decisions you can select from: **Accept**; **Partially Accept**; **Clarification** or **Resubmission**. It's up to you to choose the appropriate assessment decision.

STEP 1a Select the indicator you wish to assess from your Practitioner's Course Folder and download it as shown on Page 10.



A screenshot of a web interface showing a list of indicators. Each indicator is represented by a document icon, a title, and a 'Total Docs' count. The indicators are: > 01.3b - 3b Act in ways that promote the ability of others to make informed decisions (Total Docs: 0); > 01.3c - 3c Act in ways that promote equality and value diversity (Total Docs: 0); > 01.3d - 3d Act in ways that value people as individuals (Total Docs: 0); > 01.3e - 3e Act in ways that acknowledge the importance of data confidentiality and disclosure, and the use of data s (Total Docs: 0); and > 01.3f - 3f Act in ways that are consistent with legislation, policies, governance frameworks and systems. (Total Docs: 2). The last indicator is highlighted with a blue arrow icon.

STEP 1b Select the assessment decision you have decided to give the indicator from the four choices available and click the relevant button.

Once clicked this will open the Contact Diary window to allow you to explain your decision.

A screenshot of a button panel titled 'Indicator Submitted & Awaiting Review'. It contains four red buttons: 'Accept' with a checkmark icon, 'Partially Accept' with a checkmark icon, 'Clarification' with a circular arrow icon, and 'Resubmission' with a circular arrow icon. A hand cursor icon is pointing at the 'Resubmission' button.

STEP 1c First, you should click the **Private Box** so that your Practitioner cannot see the assessment decision straight away.

A screenshot of the 'Contact Diary' entry form. The form has tabs for 'Entry', 'Indicator', and 'Summary'. The 'Entry' tab is active. There is a 'Private' checkbox checked, with a note '(Practitioner or Company will not see)'. Below this is an 'Assessment Feedback' text area with a rich text editor toolbar. The text area contains the text 'Indicator 01.3f Accepted as Complete'. A hand cursor icon is pointing at the 'Private' checkbox. At the bottom, there is a 'Feedback' text area with another rich text editor toolbar.

Top tip!
The description box is pre-filled and does not need to be changed.

STEP 1d In the **Feedback Box**, you must provide the reasons for your assessment decision.

Feedback

Accurate and thorough evidence, well done.

Meeting / Appointment Date

On the Job Training Hours 0 Minutes 0

Off the Job Training Hours 0 Minutes 0

Acknowledgements

Require Practitioner

Require Secondary Assessor

X Close Save

STEP 1e Once your comments are complete click the **Create** button.

STEP 1f Click the **Close** button to complete the process.

The comment will then appear in the Contact Diary.

Contact

Displaying 1 to 19 of 19 Diary Entries

25 per page

1 of 1

Test Assessor (Primary Assessor)
20 Feb 2018 16:16

Outcome(s): 01.3f

Description
Indicator 01.3f Accepted as Complete

Feedback
Accurate and thorough evidence, well done.

Info
Assessment Feedback
Private

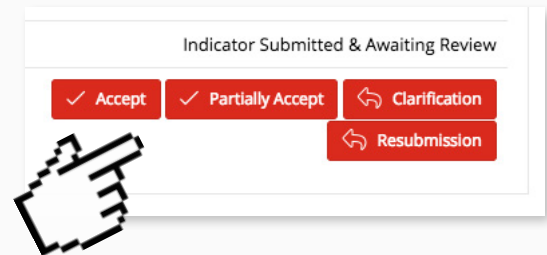
> 01.3b - 3b Act in ways that promote the ability of others to make informed decisions	Total Docs: 0	Not Started
> 01.3c - 3c Act in ways that promote equality and value diversity	Total Docs: 0	Not Started
> 01.3d - 3d Act in ways that value people as individuals	Total Docs: 0	Not Started
> 01.3e - 3e Act in ways that acknowledge the importance of data confidentiality and disclosure, and the use of data sharing protocols	Total Docs: 0	Not Started
> 01.3f - 3f Act in ways that are consistent with legislation, policies, governance frameworks and systems.	Total Docs: 2	Reviewed and Accepted 20 Feb 2018 (Test Assessor)
> 01.4a - 4a Continually develop and improve own and others' practice in public health by reflecting on own behaviour and practice and identifying where improvements should be made	Total Docs: 0	Not Started

As well as in the Contact Diary section at the bottom of the indicator in the Course Folder view too.

8. Use of the privacy box

One of the key techniques that you need to master is the use of the Privacy Box in the Contact Diary. The primary use of the privacy box is to hide assessment feedback until you're ready to present it to the practitioner.

STEP 1a Once you have reviewed a Practitioners work and made your assessment decision as shown on Page 11 of this guide, you are strongly advised to tick the Privacy Box in the Contact Diary entry associated with that assessment.

A screenshot of the "Contact Diary" form. The title "Contact Diary" is at the top, followed by "Create Diary Entry". Below this are three tabs: "Entry", "Indicator", and "Summary". The "Entry" tab is active. In the "Entry" section, there is a "Private" checkbox which is checked, with a note "(Practitioner or Company will not see)". A hand cursor icon is pointing at the "Private" checkbox. Below this is the "Entry Label" field, which contains "Assessment Feedback". Below that is the "Description" field, which contains "Indicator 01.3f Accepted as Complete". The "Description" field has a rich text editor toolbar above it with buttons for Bold (B), Italic (I), Underline (U), Strikethrough, Bulleted List, Numbered List, Indent, and Link.

This has two benefits: In the event that the you need to change the assessment decision or edit the comments in the Contact Diary entry, the practitioner will not see any changes. Secondly, the Practitioner will not see any Assessment Decisions or Comments in the Contact Diary until you are ready to feedback to them.

STEP 1b To un-tick the privacy box of an indicator you need to locate it in the Contact Diary and click on the edit icon.

Course Evidence Registration **Contact** Reviews Metrics PDR Journey

Contact Create Entry Print Filter

Displaying 1 to 19 of 19 Diary Entries 25 per page 1 of 1

Test Assessor (Primary Assessor)
20 Feb 2018 16:16

Outcome(s): 01.3f

Description
Indicator 01.3f Accepted as Complete

Feedback
Accurate and thorough evidence, well done.

Info
 Assessment Feedback
 Private

STEP 1c This will open up the Contact Diary entry for that indicator and from here you can un-tick the privacy box. This allows the practitioner to see all the assessment decisions made and all the feedback provided.

Contact Diary

Update Diary Entry

Private
 (Practitioner or Company will not see)

Entry Label
Assessment Feedback

Description

B I U [Rich Text Editor Toolbar]

You will now see this reflected in both instances of the Contact Diary: At the bottom of the indicator page and at the bottom of the indicator in the Course Folder view.

Test Assessor (Primary Assessor)
20 Feb 2018 16:16

Outcome(s): 01.3f

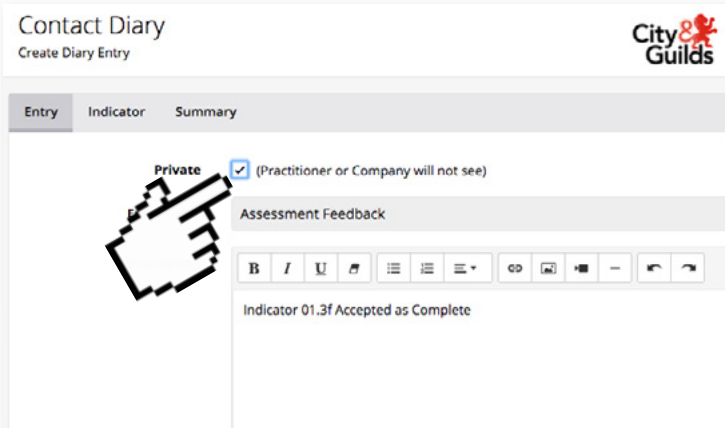
Description
Indicator 01.3f Accepted as Complete

Feedback
Accurate and thorough evidence, well done.

Info
 Assessment Feedback

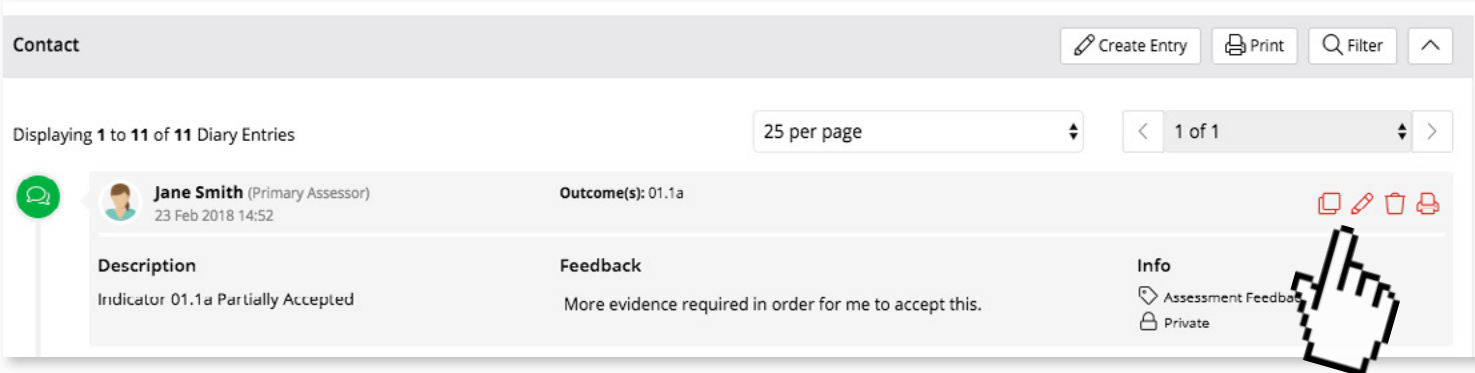
9. Changing an assessment decision or editing comments

There may be times when you need to change your comments for an assessment decision or even change the assessment decision entirely. The process of doing this is simple providing the **Privacy Box** was clicked in the Contact Diary entry for the previous assessment decision.



Please note: If the options discussed for editing comments or updating assessment decisions aren't available, it may be that the time limit on allowing editing of the entry has passed or the Privacy Box wasn't clicked on the original assessment decision. In this case, please contact the e-portfolio support team for further advice on how to proceed.

STEP 1a To edit the comments on a previous assessment decision, go to the indicator to be updated and scroll down to the Contact Diary section.



STEP 1b Click the **Edit the Contact Diary Entry** icon next to the entry that needs to be updated.



Update Diary Entry

Entry Label

Assessment Feedback

Description

Indicator 01.1a Partially Accepted

Feedback

Current documents now cover off the additional evidence.

STEP 1c The Contact Diary Entry box will appear containing the previous comments. From here you can update the text in the action box



Assessment Date

X Close Save

STEP 1d Click **Save** to complete the process of editing comments.



STEP 1e Finally click on the **Close** button.

STEP 2a To change a previous assessment decision go to the indicator to be updated and scroll down to the Contact Diary section.

Create Entry Print Filter

25 per page 1 of 1

Outcome(s): 01.1a

Feedback

More evidence required in order for me to accept this.

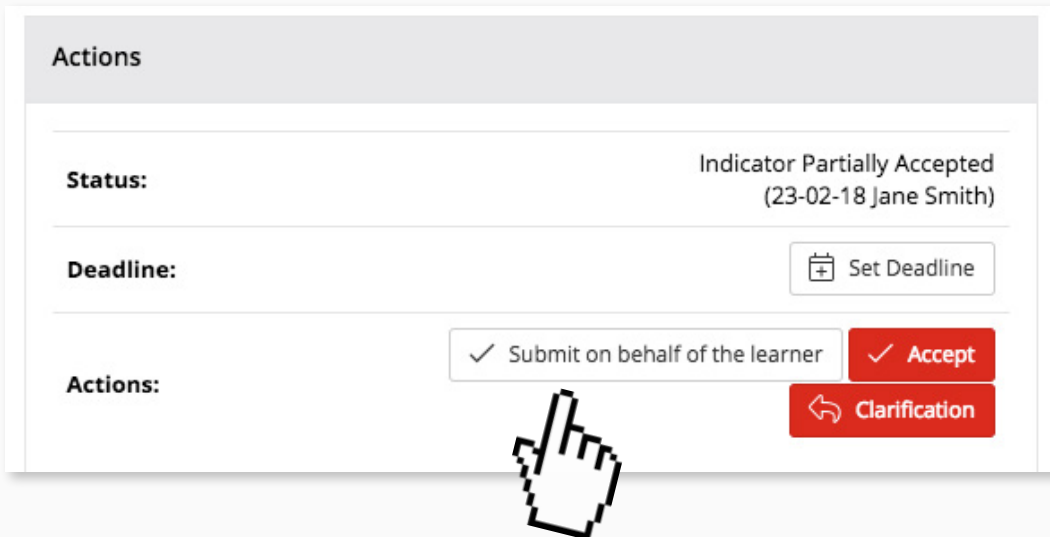
Info

- Assessment Feedback
- Private

STEP 2b Click the **delete icon** to remove the entry

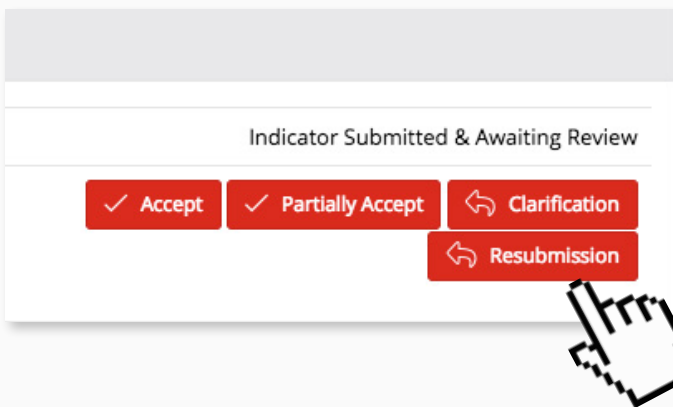


STEP 2c Once the entry is deleted, scroll back up and and choose one of the available assessment decisions



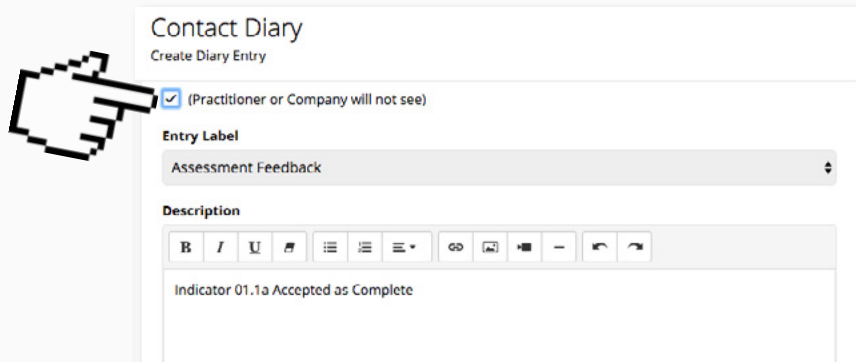
STEP 2d If the assessment decision required isn't available, then click **submit on behalf of the learner**

All four assessment decisions will appear.



STEP 2e As shown in the steps on page 11 select the appropriate assessment and complete the Contact Diary entry.

STEP 2f Click the **Private Box**, provide the reasons for the assessment decision in the **Actions Box**.






STEP 2g Click **Save** to complete the task.


STEP 2h Finally click on the **Close** button.



STEP 2i Once assessment is complete and you're ready to reveal the outcome to the practitioner, click the edit diary entry icon next to the relevant assessment decision.

1 of 11 Diary Entries 25 per page < 1 of 1 >

Jane Smith (Primary Assessor) 23 Feb 2018 16:35	Outcome(s): 01.1a	  
Description Outcome 01.1a Accepted as Complete	Feedback Sufficient evidence for this to be accepted	Info Assessment Feedback








STEP 2j Finally un-tick the private box in the Contact Diary Entry.

Private
 (Practitioner or Company will not see)

Entry Label
Assessment Feedback

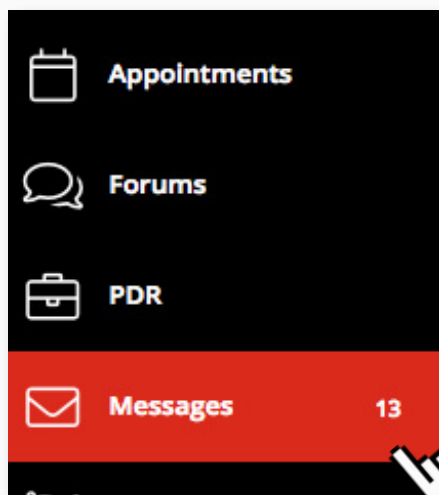
Description

B **I** **U**    



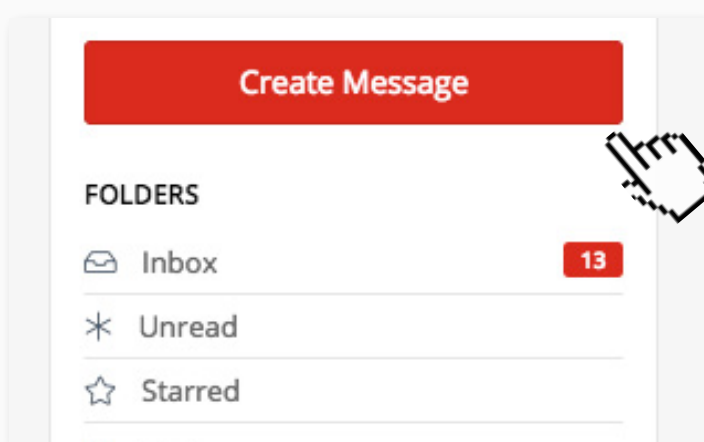
10. Contacting your practitioner via the e-portfolio system

We recommend, for audit purposes, that any communication to do with the Public Health Practitioner Registration Support Scheme is communicated via the e-portfolio system. You can use the Message Centre to communicate with your practitioner within the e-portfolio.

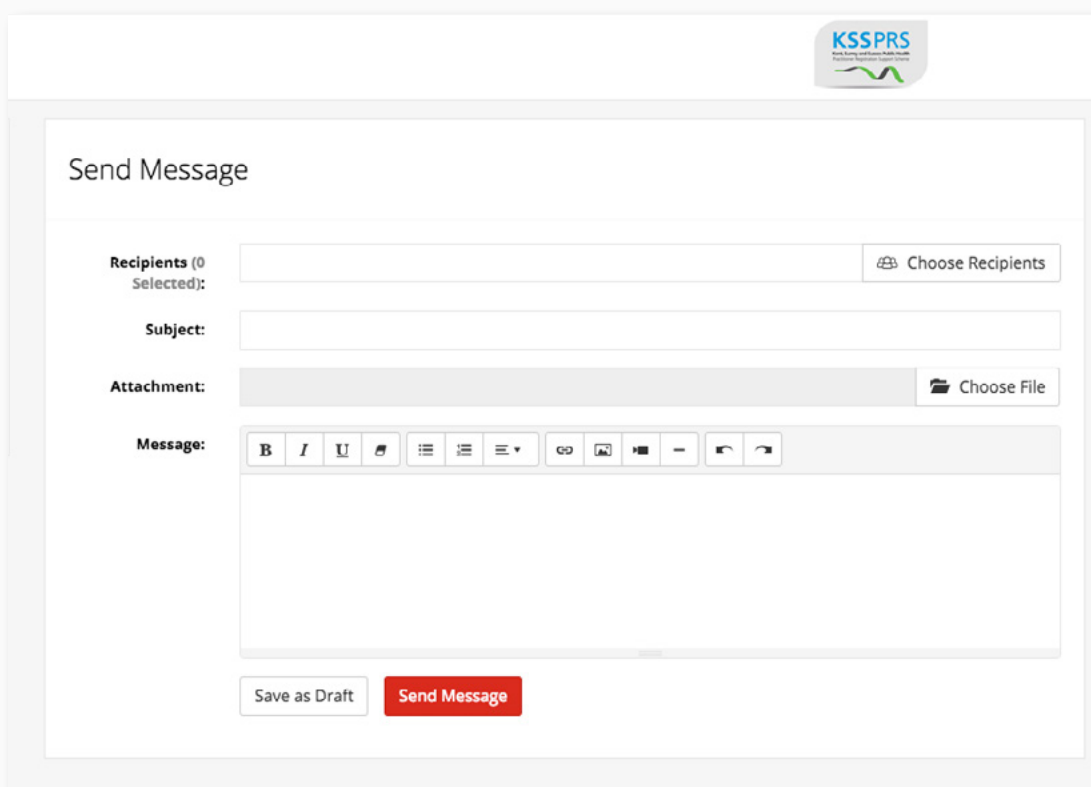


STEP 1a To go to the Left hand menu and click on **Messages**.

STEP 1b Click **Create Message** to write your message.



You will now see a blank message box ready to compose your message.



KSSPRS
Public Health Practitioner Registration Support Scheme

Send Message

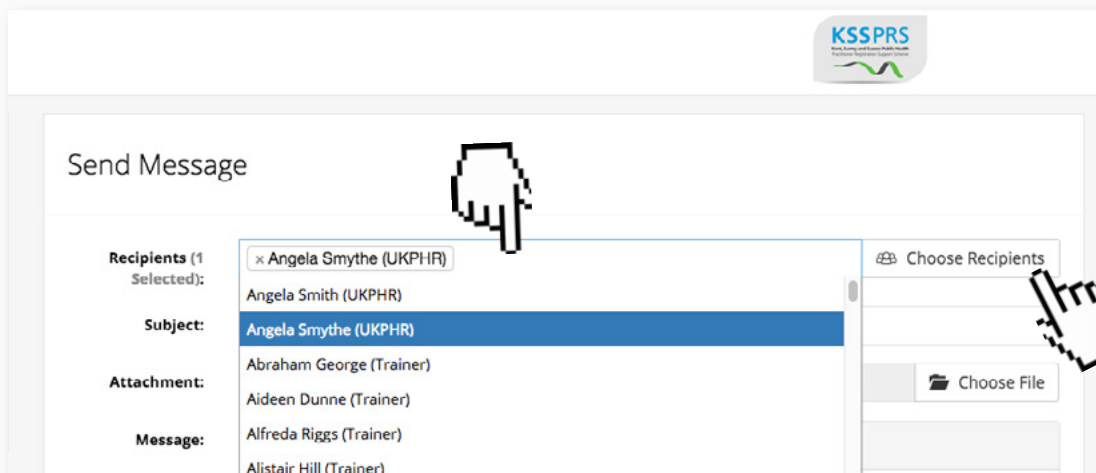
Recipients (0 Selected): [Choose Recipients](#)

Subject:

Attachment: [Choose File](#)

Message: **B** *I* U

STEP 1c You can select single or multiple recipients from the list of Practitioners.



KSSPRS
Send Message

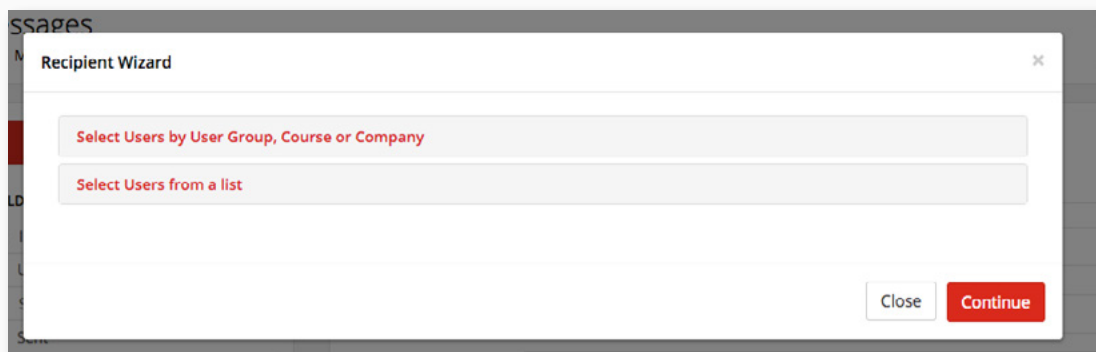
Recipients (1 Selected):
x Angela Smythe (UKPHR)

Subject:
Angela Smythe (UKPHR)

Attachment:
Abraham George (Trainer)
Aideen Dunne (Trainer)
Alfreda Riggs (Trainer)
Alistair Hill (Trainer)

Choose Recipients
Choose File

STEP 1d Or by clicking on **Choose Recipients** you can use the Recipient Wizard to send a message to all your applicants at once or perhaps to send a message to the practitioners in a particular Cohort.



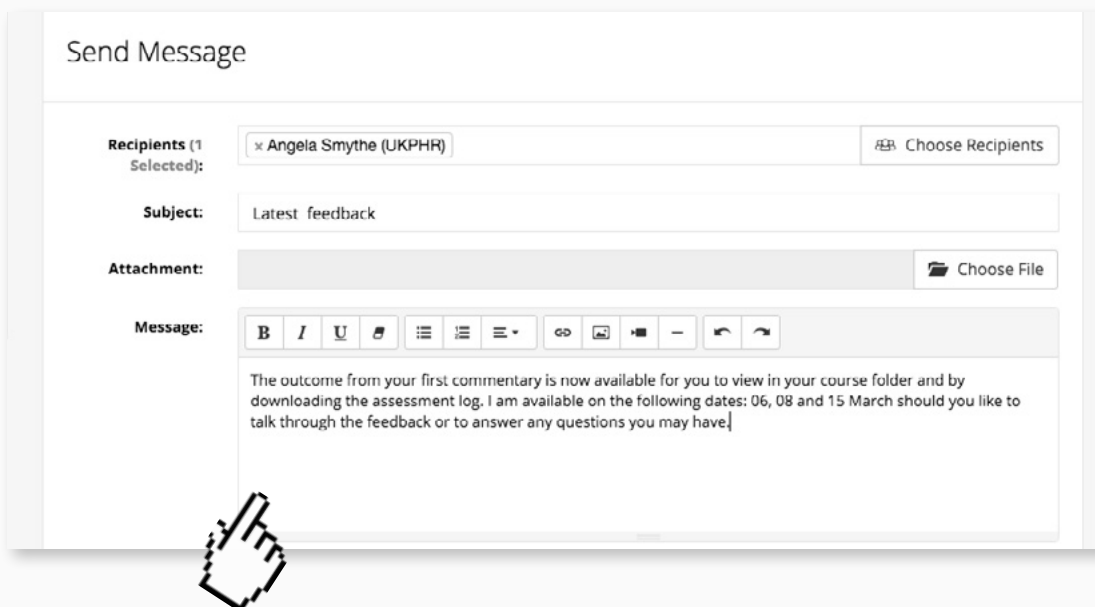
Recipient Wizard

Select Users by User Group, Course or Company

Select Users from a list

Close Continue

STEP 1e Give your message a subject



Send Message

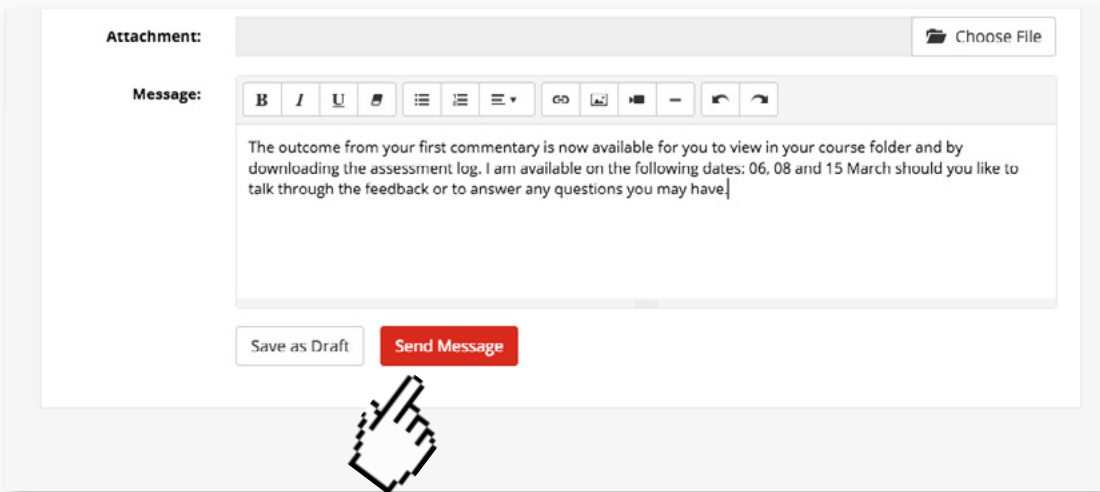
Recipients (1 Selected):
x Angela Smythe (UKPHR)

Subject:
Latest feedback

Attachment:
Choose File

Message:
B I U [Icons]
The outcome from your first commentary is now available for you to view in your course folder and by downloading the assessment log. I am available on the following dates: 06, 08 and 15 March should you like to talk through the feedback or to answer any questions you may have.

STEP 1f Use the space provided to write the message. For example you can use the Message Centre to prompt your practitioner that feedback is ready to view as well as offering potential dates to discuss the feedback over the telephone.

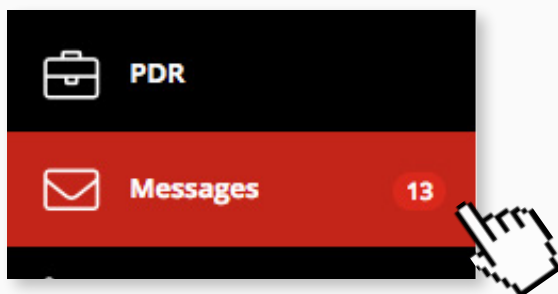


STEP 1g Once you have completed your message click the **Send** button to send the message to them.

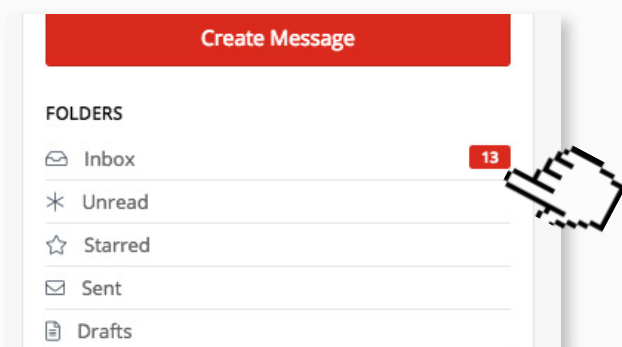
The Applicant will see the notification that they have new messages when they next log in and they will probably receive an email alert too.

Reading a Message

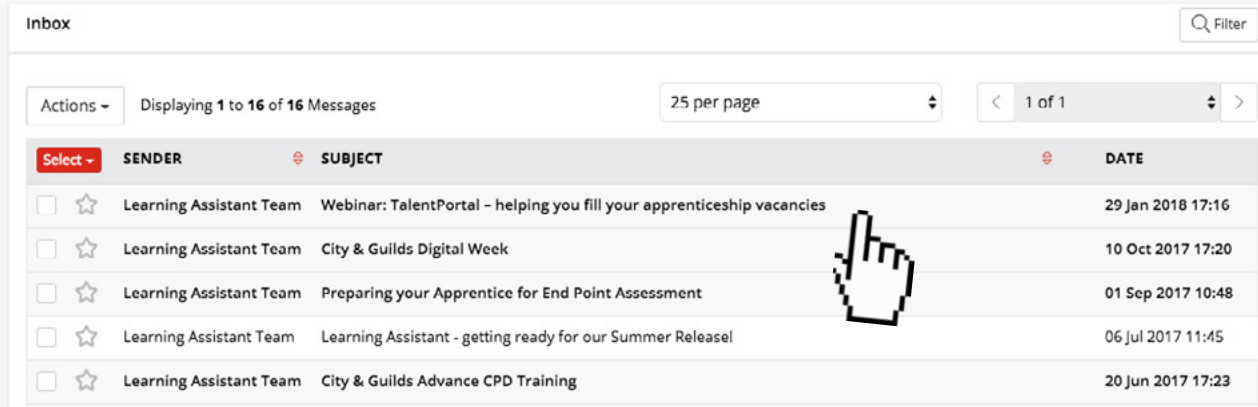
The Menu on the left of the screen will show you if there are any new or unread messages in your inbox.



STEP 2a Click on Inbox to see any unread messages

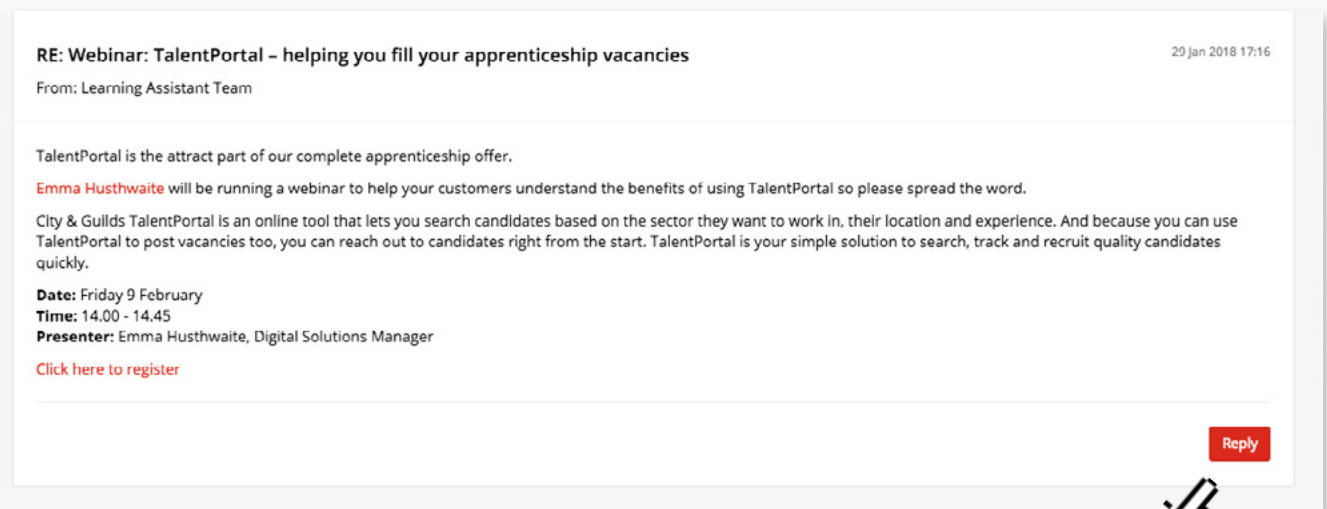


You will see the messages in your inbox. Those that are in bold/have a light grey background are new or unread.



Select	SENDER	SUBJECT	DATE
<input type="checkbox"/>	Learning Assistant Team	Webinar: TalentPortal - helping you fill your apprenticeship vacancies	29 Jan 2018 17:16
<input type="checkbox"/>	Learning Assistant Team	City & Guilds Digital Week	10 Oct 2017 17:20
<input type="checkbox"/>	Learning Assistant Team	Preparing your Apprentice for End Point Assessment	01 Sep 2017 10:48
<input type="checkbox"/>	Learning Assistant Team	Learning Assistant - getting ready for our Summer Release!	06 Jul 2017 11:45
<input type="checkbox"/>	Learning Assistant Team	City & Guilds Advance CPD Training	20 Jun 2017 17:23

STEP 2b Click on the message you wish to read.



RE: Webinar: TalentPortal - helping you fill your apprenticeship vacancies 29 Jan 2018 17:16

From: Learning Assistant Team

TalentPortal is the attract part of our complete apprenticeship offer.

Emma Hustwaite will be running a webinar to help your customers understand the benefits of using TalentPortal so please spread the word.

City & Guilds TalentPortal is an online tool that lets you search candidates based on the sector they want to work in, their location and experience. And because you can use TalentPortal to post vacancies too, you can reach out to candidates right from the start. TalentPortal is your simple solution to search, track and recruit quality candidates quickly.

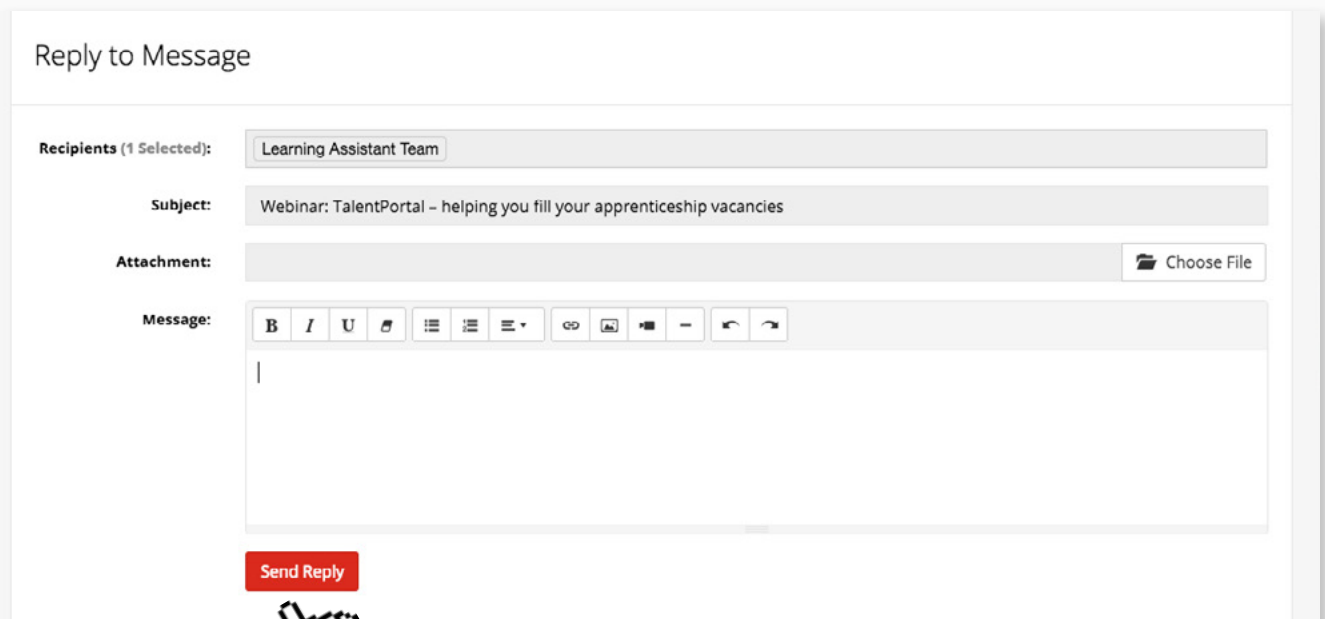
Date: Friday 9 February
Time: 14.00 - 14.45
Presenter: Emma Hustwaite, Digital Solutions Manager

[Click here to register](#)

Reply

STEP 2c To respond to the message click on **Reply**.

STEP 2d Add your response in the space provided.



Reply to Message

Recipients (1 Selected): Learning Assistant Team

Subject: Webinar: TalentPortal - helping you fill your apprenticeship vacancies

Attachment: Choose File

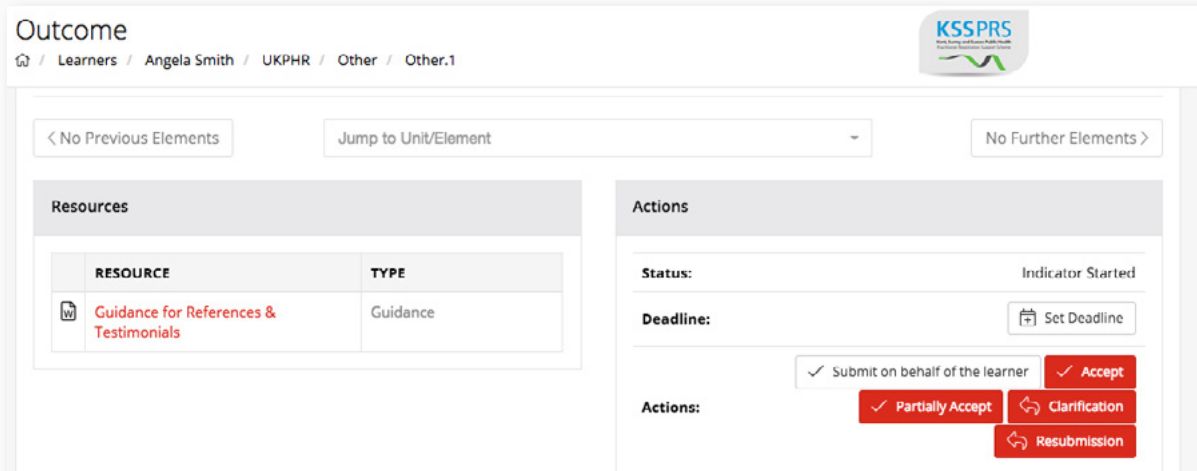
Message:

Send Reply


STEP 2e When you're ready click on **Send Reply**.

11. Assessing supporting information

Practitioners upload a copy of their CV and their Job Description as part of being assigned an assessor. These documents, usually, do not need to be formally assessed but are often useful for background information on the practitioner. On occasions, you may wish to partially accept the Job Description and CV.



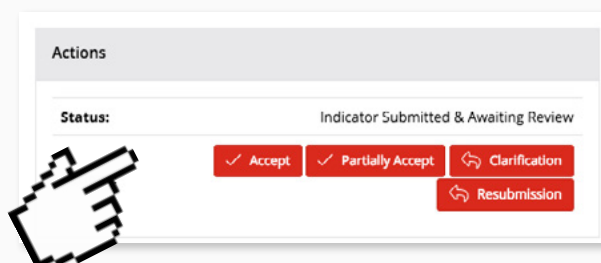
The screenshot shows the 'Outcome' interface for a learner named Angela Smith. It features a 'Resources' table and an 'Actions' panel. The 'Resources' table has two columns: 'RESOURCE' and 'TYPE'. One resource is listed: 'Guidance for References & Testimonials' with a 'Guidance' type. The 'Actions' panel shows the status 'Indicator Started', a 'Deadline' section with a 'Set Deadline' button, and a row of action buttons: 'Submit on behalf of the learner' (checked), 'Accept', 'Partially Accept', 'Clarification', and 'Resubmission'.

RESOURCE	TYPE
 Guidance for References & Testimonials	Guidance

However, once the portfolio is ready for verification this section will need to be signed off and must contain the following documents:

- A completed application form
- A current CV
- Their current job description
- A Testimonial
- A Reference
- Copies of original certificates certified as genuine by a senior colleague.

STEP 1a To sign off the supporting documents, follow the normal procedure choosing from the Accept; Partially Accept; Clarification or Resubmission as shown on page 11 of this guide.

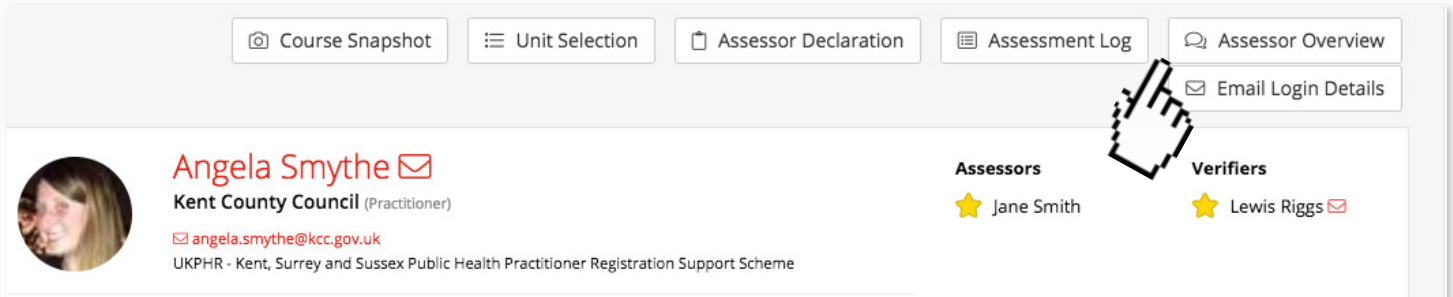


This close-up screenshot shows the 'Actions' panel with the status 'Indicator Submitted & Awaiting Review'. The action buttons are 'Accept', 'Partially Accept', 'Clarification', and 'Resubmission'. A hand cursor is pointing at the 'Accept' button.

12. Completing the assessor overview

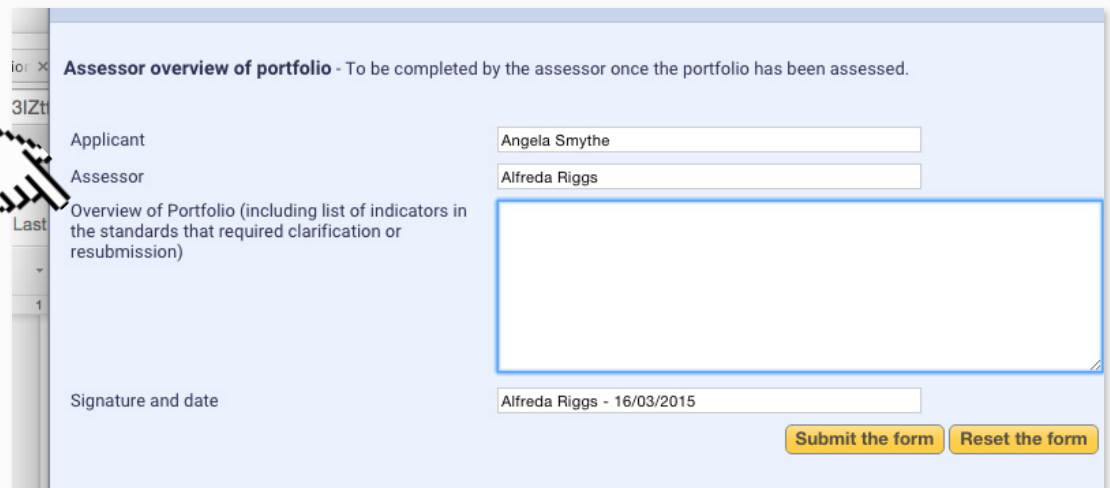
Once the portfolio is ready for Verification, you will need to complete the Assessor Overview.

STEP 1a Click on the **Assessor Overview** link in the practitioner's course folder.



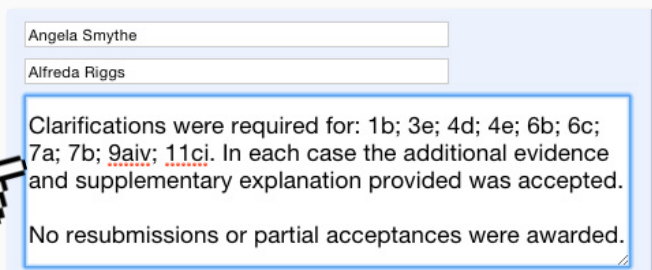
The screenshot shows a navigation bar with buttons for 'Course Snapshot', 'Unit Selection', 'Assessor Declaration', 'Assessment Log', and 'Assessor Overview'. Below the navigation bar is the user profile for Angela Smythe, a practitioner at Kent County Council. To the right, there are sections for 'Assessors' (Jane Smith) and 'Verifiers' (Lewis Riggs). A hand cursor icon points to the 'Assessor Overview' button.

STEP 1b A pop up box will appear and you will need to fill out the **Overview of Portfolio** box



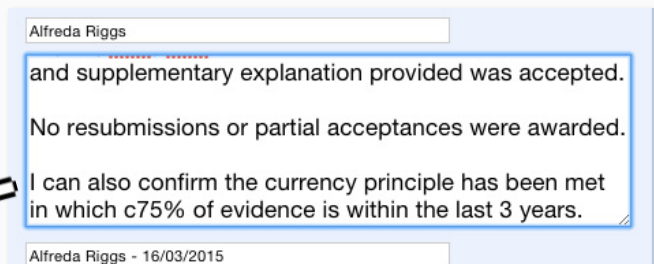
The screenshot shows the 'Assessor overview of portfolio' form. It includes fields for 'Applicant' (Angela Smythe) and 'Assessor' (Alfreda Riggs). A large text area is labeled 'Overview of Portfolio (including list of indicators in the standards that required clarification or resubmission)'. Below this is a 'Signature and date' field with the text 'Alfreda Riggs - 16/03/2015'. There are 'Submit the form' and 'Reset the form' buttons. A hand cursor icon points to the text area.

STEP 1c You should list all the standards that required clarification, resubmission or were partially accepted.



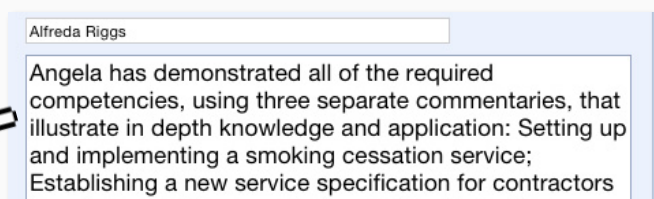
The screenshot shows a close-up of the text area from the previous form. The text reads: 'Clarifications were required for: 1b; 3e; 4d; 4e; 6b; 6c; 7a; 7b; 9aiv; 11cj. In each case the additional evidence and supplementary explanation provided was accepted. No resubmissions or partial acceptances were awarded.' A hand cursor icon points to the text.

STEP 1d The currency of the evidence should also be confirmed.



The screenshot shows a close-up of the text area from the previous form. The text reads: 'and supplementary explanation provided was accepted. No resubmissions or partial acceptances were awarded. I can also confirm the currency principle has been met in which c75% of evidence is within the last 3 years.' A hand cursor icon points to the text.

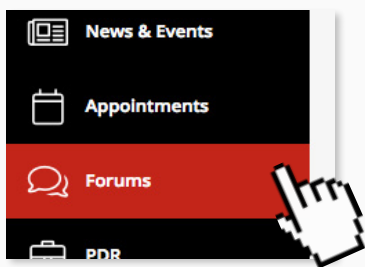
STEP 1e A short paragraph providing a summary of the assessment is also required.



The screenshot shows a close-up of the text area from the previous form. The text reads: 'Angela has demonstrated all of the required competencies, using three separate commentaries, that illustrate in depth knowledge and application: Setting up and implementing a smoking cessation service; Establishing a new service specification for contractors' A hand cursor icon points to the text.

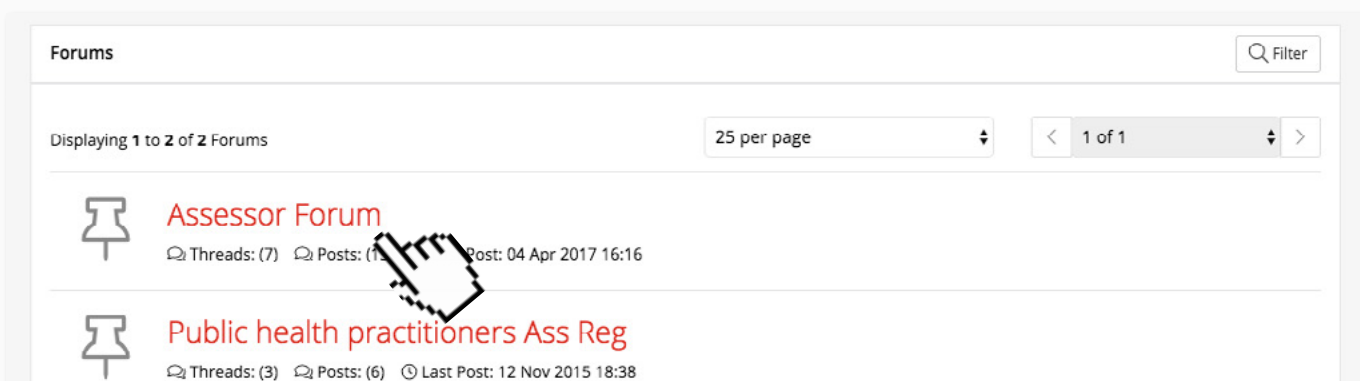
13. Using the forum

Learning Assistant also offers a Forum which can be used to ask questions and share thoughts with other e-portfolio users such as the Practitioners, Assessors and Verifiers.

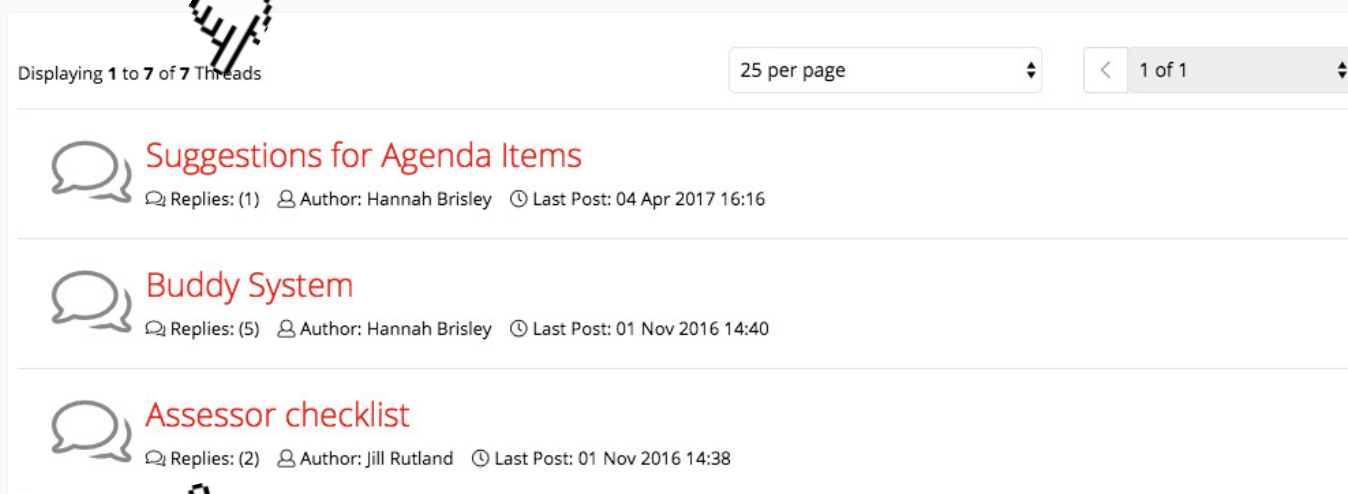


STEP 1a To access the forums, click on **Forums** in the left hand menu.

STEP 1b You will see a list of forum names from which you can click on the one you would like to read.

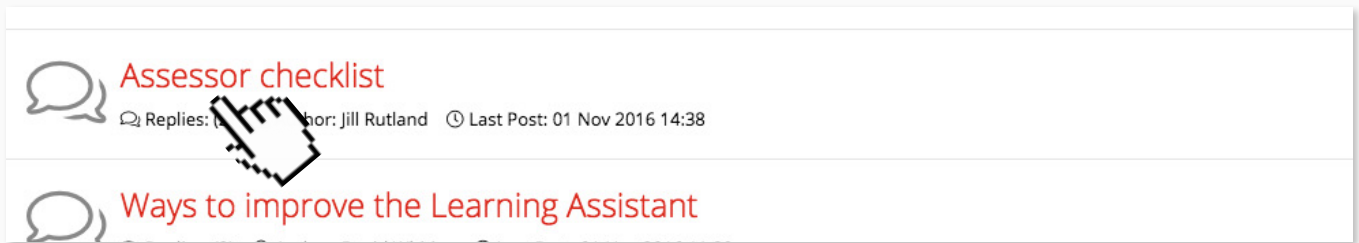


You will see a list of topics (or threads) in that forum...



...and the number of replies for each.

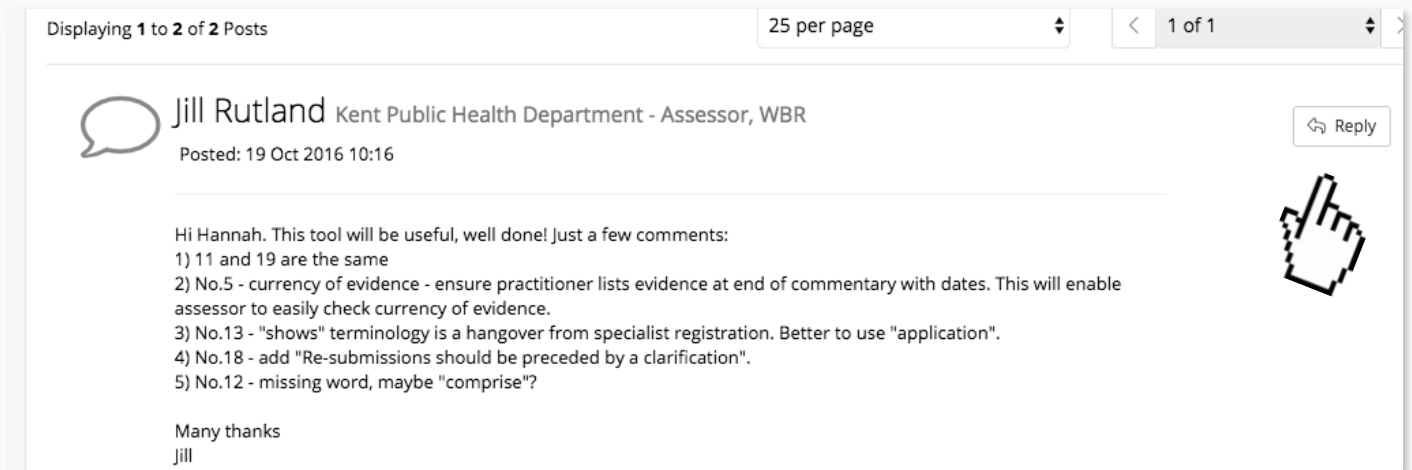
STEP 1c Click on a relevant topic to view the posts.



Assessor checklist
Replies: [unreadable] Author: Jill Rutland Last Post: 01 Nov 2016 14:38

Ways to improve the Learning Assistant

This will show all the posts on that topic.



Displaying 1 to 2 of 2 Posts 25 per page 1 of 1

Jill Rutland Kent Public Health Department - Assessor, WBR
Posted: 19 Oct 2016 10:16

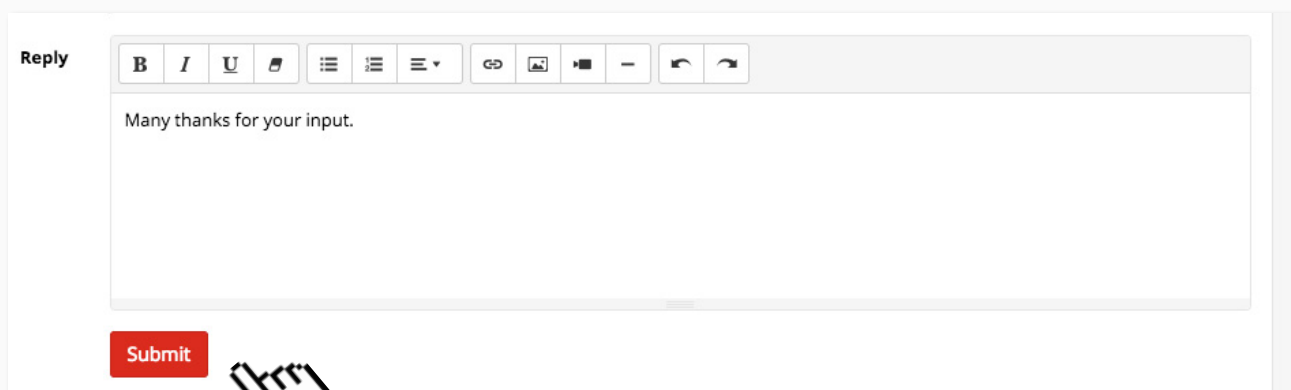
Hi Hannah. This tool will be useful, well done! Just a few comments:

- 1) 11 and 19 are the same
- 2) No.5 - currency of evidence - ensure practitioner lists evidence at end of commentary with dates. This will enable assessor to easily check currency of evidence.
- 3) No.13 - "shows" terminology is a hangover from specialist registration. Better to use "application".
- 4) No.18 - add "Re-submissions should be preceded by a clarification".
- 5) No.12 - missing word, maybe "comprise"?

Many thanks
Jill

Reply

STEP 1d If you wish to write a reply to any of the posts, click the reply button.



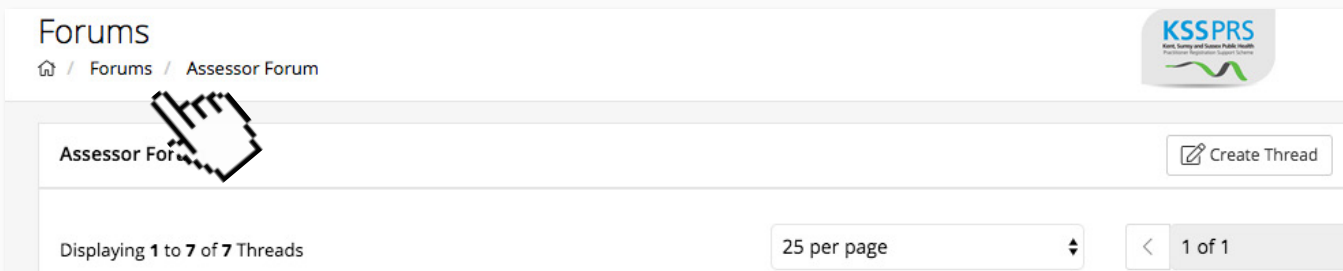
Reply

Many thanks for your input.

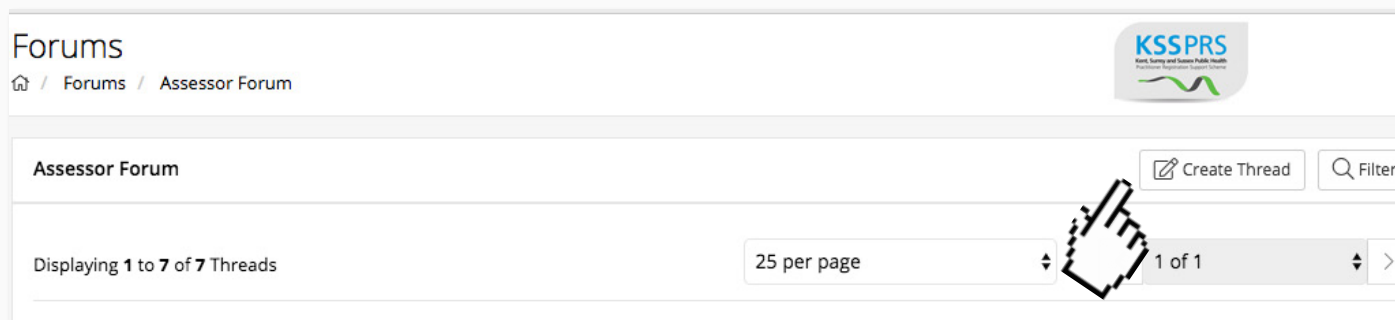
Submit

STEP 1e Add a message and click **Post**.

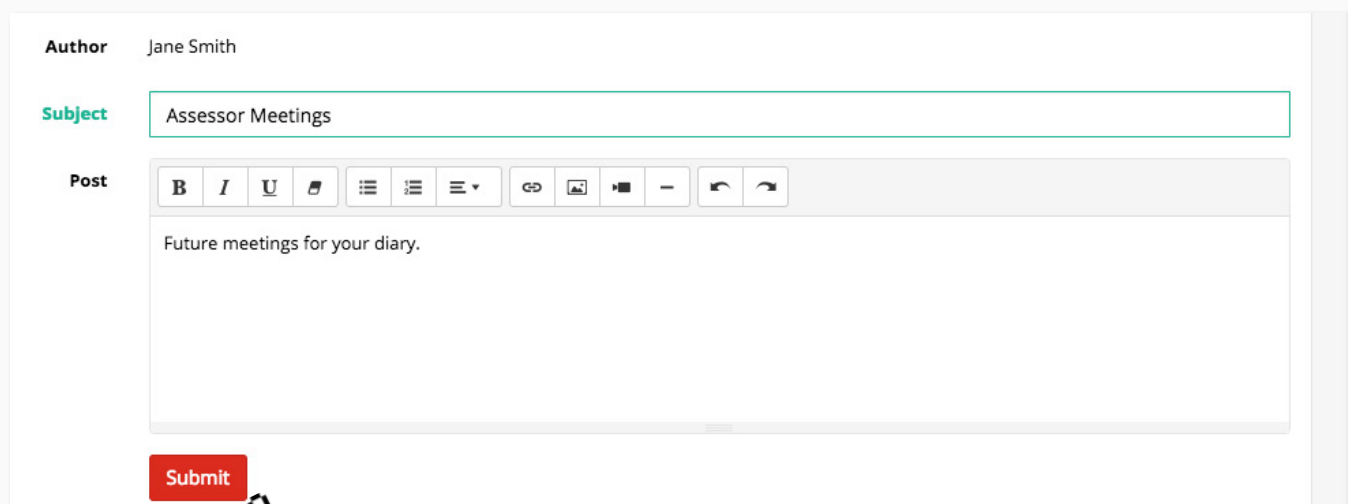
STEP 2a If you want to start a new topic you can return to the list of topics by clicking the **Forums** link at the top of the page.



STEP 2b Then click **Create Thread**

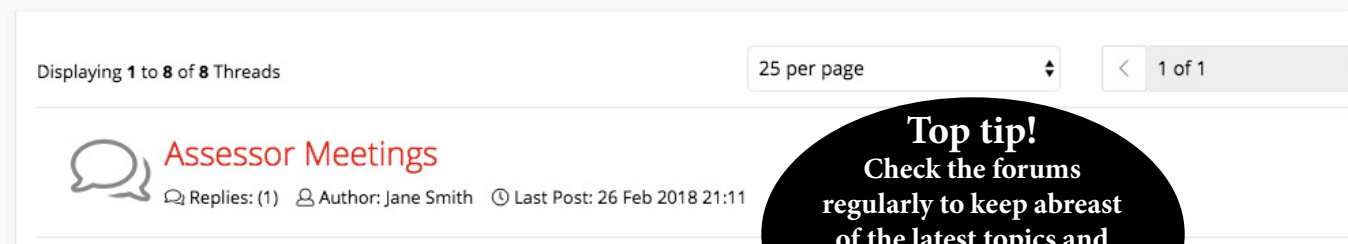


STEP 2c Add a Subject and Message as required.



STEP 2d Click **Submit** once you're ready to share in the forum.

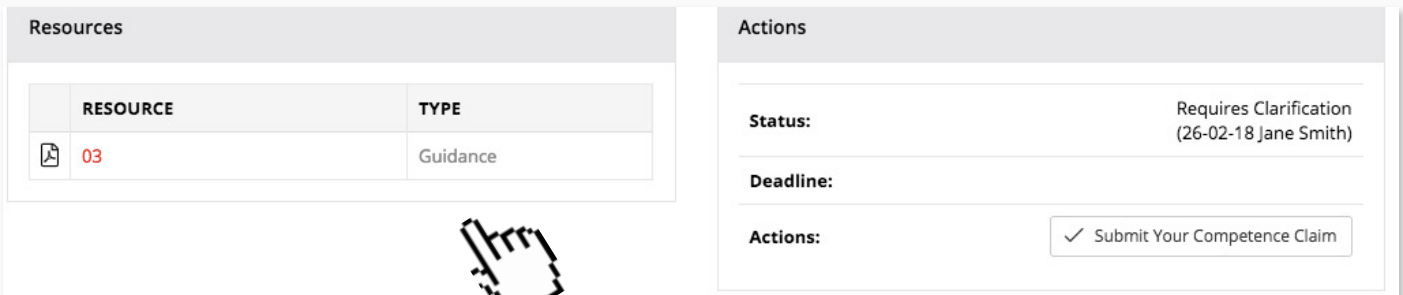
The topic will then appear for others to reply to.



Top tip!
Check the forums regularly to keep abreast of the latest topics and to answer any of your practitioners queries

14. What to do if your applicant self-elects a resubmission

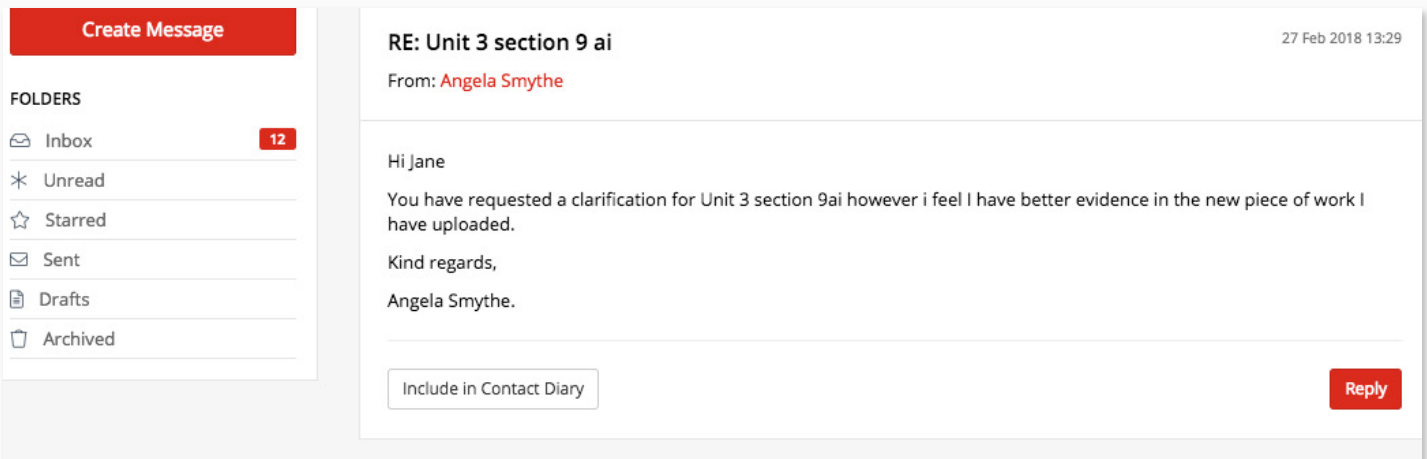
There may be times when an assessor has awarded a clarification, but the applicant feels they have better evidence in a different piece of work (i.e in a new commentary).



The screenshot shows a 'Resources' table with one row: '03' (with a document icon) under the 'RESOURCE' column and 'Guidance' under the 'TYPE' column. To the right is an 'Actions' panel with the following details:

- Status:** Requires Clarification (26-02-18 Jane Smith)
- Deadline:** (empty)
- Actions:** Submit Your Competence Claim

If this is the case, the applicant will contact their assessor via the message centre and request the particular indicator as a resubmission.



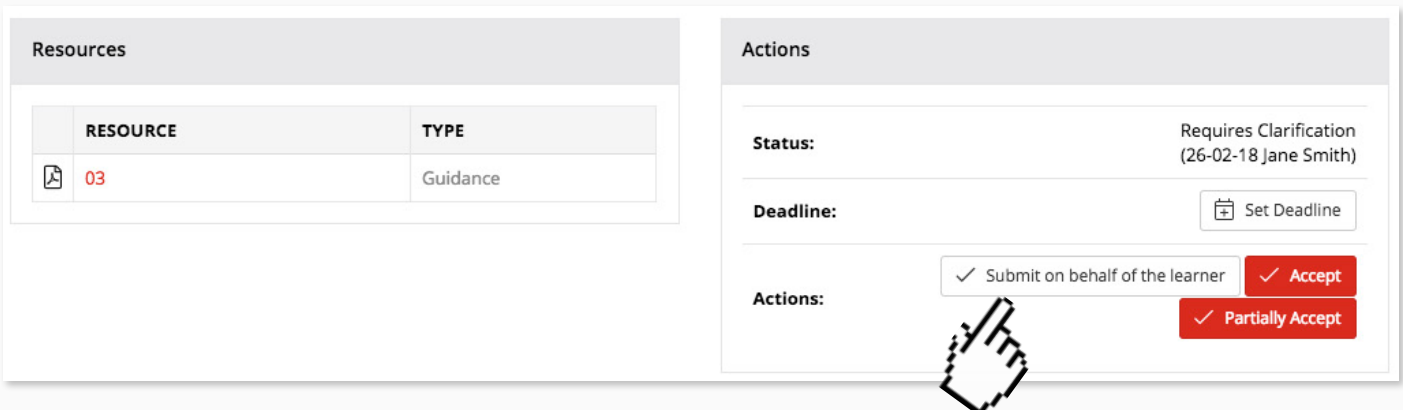
The screenshot shows an email interface. On the left is a 'FOLDERS' sidebar with 'Inbox' (12), 'Unread', 'Starred', 'Sent', 'Drafts', and 'Archived'. The main message is:

RE: Unit 3 section 9 ai 27 Feb 2018 13:29
From: Angela Smythe

Hi Jane
You have requested a clarification for Unit 3 section 9ai however i feel I have better evidence in the new piece of work I have uploaded.
Kind regards,
Angela Smythe.

Buttons: 'Include in Contact Diary' and 'Reply'.

STEP 1a To facilitate this request, navigate to the relevant indicator in the applicant's course folder

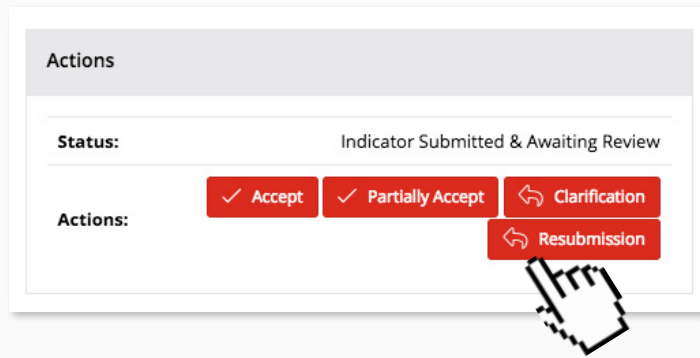


The screenshot shows the same 'Resources' table as above. The 'Actions' panel now includes:

- Status:** Requires Clarification (26-02-18 Jane Smith)
- Deadline:**
- Actions:** Submit on behalf of the learner

STEP 1b You will need to click the **submit on behalf of learner** link.

STEP 1c All the available assessment decisions will appear. You should choose resubmission.



Contact Diary
Create Diary Entry

(Practitioner or Company will not see)

Entry Label
Assessment Feedback

Description

Indicator 03.9ai Returned for Resubmission

Feedback

Angela has self-elected a resubmission and will be addressing the relevant indicator in a new commentary.

Close Save

STEP 1d In the Contact Diary comment box, under actions, you should state that the practitioner has self-elected a resubmission and will be addressing the relevant indicator in a new commentary.

In this instance, there is no need to tick the private box as this is an entry in response to a practitioner request.

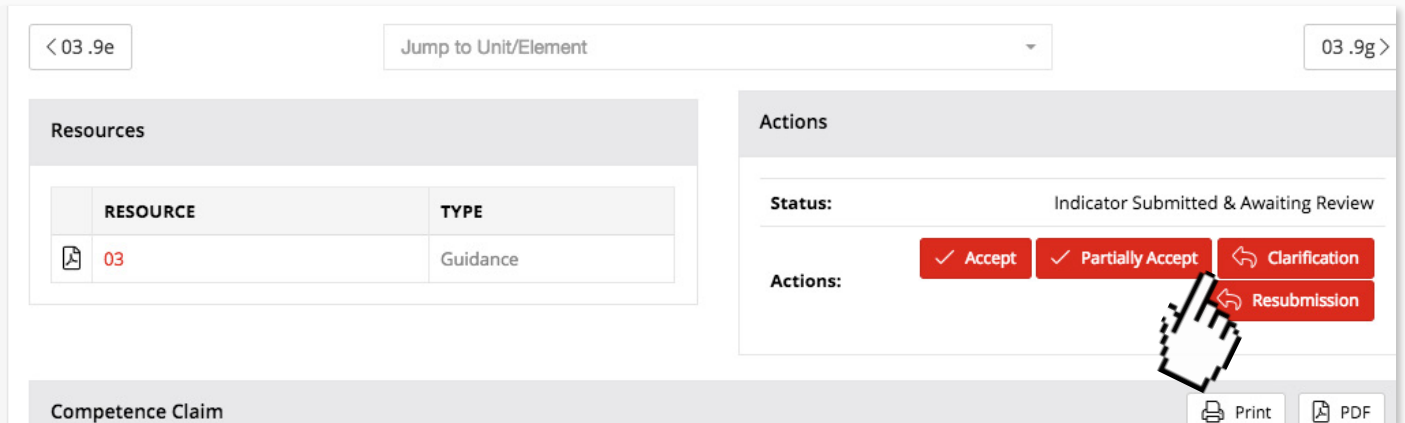


STEP 1e Click **Save** and **Close**.


15. Breach of confidentiality

Confidentiality must be maintained at all times. A Practitioners e-portfolio must not provide any personal details of their clients and patients such as home addresses, NHS numbers and so on. If there is a breach of confidentiality in a commentary or piece of evidence, the Assessor usually follows the same procedure as for a clarification.

STEP 1a Go into course folder and click on any indicator in which the evidence containing the breach can be found.



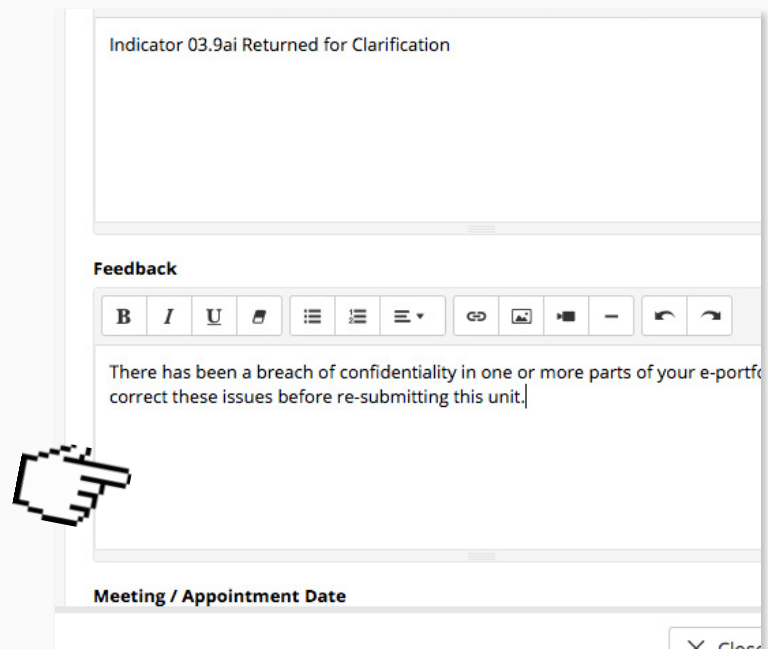
The screenshot shows a web interface for an e-portfolio. At the top, there are navigation elements: a left arrow with '03 .9e', a 'Jump to Unit/Element' dropdown menu, and a right arrow with '03 .9g'. Below this is a 'Resources' section with a table:

RESOURCE	TYPE
 03	Guidance

To the right of the table is an 'Actions' section. The 'Status' is 'Indicator Submitted & Awaiting Review'. Below the status are four red buttons: 'Accept', 'Partially Accept', 'Clarification', and 'Resubmission'. A hand cursor is pointing at the 'Clarification' button. At the bottom of the interface, there is a 'Competence Claim' label and 'Print' and 'PDF' icons.


STEP 1b Select **Clarification** as the Assessment Outcome.

STEP 1c The assessor should state in the comments that the evidence breaches confidentiality and that the evidence must be anonymised and re-presented prior to the indicator being submitted for assessment once more.



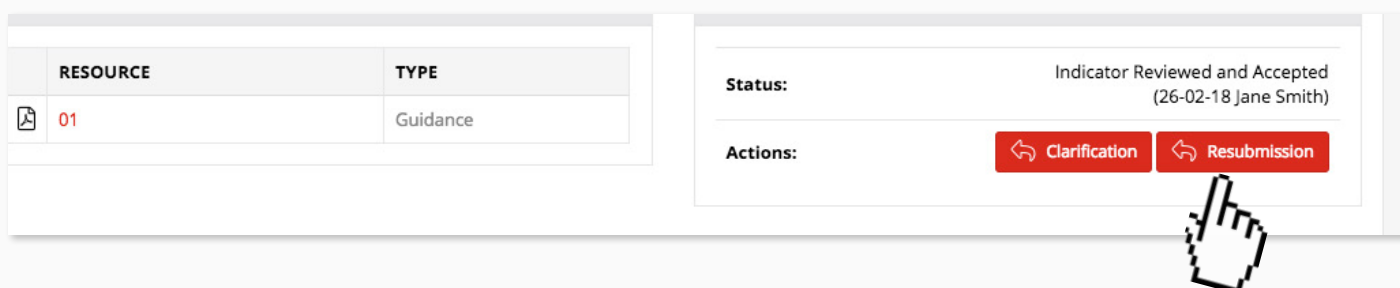
The screenshot shows a feedback form titled 'Indicator 03.9ai Returned for Clarification'. Below the title is a 'Feedback' section with a rich text editor. The editor contains the text: 'There has been a breach of confidentiality in one or more parts of your e-portfolio correct these issues before re-submitting this unit.' A hand cursor is pointing at the text. Below the feedback section is a 'Meeting / Appointment Date' field. At the bottom right, there is a 'Close' button.

In the event that the Indicator 3e titled “**Act in ways that acknowledge the importance of data confidentiality and disclosure, and the use of data sharing protocols**” has been assessed and accepted prior to the breach in confidentiality then you will need to change their assessment decision to a resubmission for 3e.



	Total Docs: 0
	> 01.3c - 3c Act in ways that promote equality and value diversity Total Docs: 0
	> 01.3d - 3d Act in ways that value people as individuals Total Docs: 0
	> 01.3e - 3e Act in ways that acknowledge the importance of data confidentiality and disclosure sharing protocols Total Docs: 1
	> 01.3f - 3f Act in ways that are consistent with legislation, policies, governance frameworks a Total Docs: 0
	> 01.4a - 4a Continually develop and improve own and others' practice in public health by ref

STEP 2a To do this the go to Indicator 3e in the applicant’s course folder.




RESOURCE	TYPE
01	Guidance

Status: Indicator Reviewed and Accepted (26-02-18 Jane Smith)

Actions: [Clarification](#) [Resubmission](#)

STEP 2b Change your assessment decision to a resubmission.

STEP 2c State in the Contact Diary comment box that there has been a breach of confidentiality and state the indicator where the breach had taken place.



Feedback

B I U

There has been a breach of confidentiality in one or more parts of your e-portfolio correct these issues before re-submitting this unit.]

Clearly, if 3e has not yet been accepted at this point, the assessor will need to be extra vigilant when assessing this indicator.