OneFile

Reviews

Overview

OneFile has a built in Reviews area, where Assessors can schedule, start and complete reviews for their learners. The reviews can be customised by removing the default sections and by inserting your own custom fields.

Preparation

Make all new learners automatically reviewable

A **Centre Manager** can enable the following Centre setting to make all new learners automatically reviewable.

Miscellaneous   >   Reviews   >>   New learners created are automatically reviewable.

Manually make existing learners reviewable

A **Centre Manager** can make existing learners to be reviewable, by following these steps.

1. Search the learner's name from the **Users** section.
2. Click the **Learner** button below the **Learner Options** column.
3. Scroll to the **Reviews** section.
4. Tick the setting: **This learner is reviewable.**
5. Click the **Save** button at the bottom of the page.

Reviews

☐ This learner is reviewable - tick here to use reviews for this learner

Assessors with the "*This user can manage learner accounts*" role enabled can follow the steps below.

1. Scroll to the **Assessor – Options** section.
2. Click the **Manage Learners** link.
3. Follow steps 2-5 shown above.

Scheduling Reviews

Both **Assessors** and **Centre Managers** can schedule reviews that are to be completed in the future.

Assessors can see if any reviews are scheduled by viewing their **Learner dashboard.**

| Learner	Main Learning Aim	Progress (Target)%	Anticipated Completion Date	Target Deviation	Next Review Date
I, Gemma ness Level 2 `Offline`	EDI Level 2 NVQ Certificate in Business and Administration (QCF) (Aug 2010)	1% (22%)	24/12/2014	-21%	None scheduled

The **next review date** column will show when reviews have been **scheduled**.

Colours will indicate.

- If no reviews are scheduled.
- If the review is overdue.
- If the review is scheduled to be carried out soon.

You can click the button below the **next review date** column to access reviews!

Reviews (No scheduled)
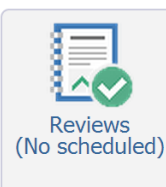
You can also open reviews by.

1. Selecting your learners name from your dashboard
2. Clicking the **Reviews** icon.

To **scheduele** your review you will need to create a **New Visit** or link the review to an **Exising Visit**.

You can select exisitng visits (Visits that have already been created on an Assessment Plan) from a drop down list.

When creating a New Visit, you will need to specify:

- Date of the visit.
- Visit type (Will the review be completed remotely or face-to-face with the learner?)
- Location (If the visit will be face to face)
- Start and End times of the visit.
- The Assessor that will be completing the review.
- Whether an SMS reminder should be sent (Only visible if enabled on the Centre).

Schedule New Review

○ New visit ○ Existing visit

Date: [12/09/2014] 📅   Type: ○ Remote session ● Face-to-face visit   Location: [   ]

Start: [   ] 🕐   End: [   ] 🕐   Assessor: [Edwards, Trisha ▾]

☐ **Send an SMS reminder to the learner the day before**   [Create]

An SMS reminder will only be sent if reminders have been enabled for the learner and they have a verified mobile number

Scheduled reviews will look similar to the example below.

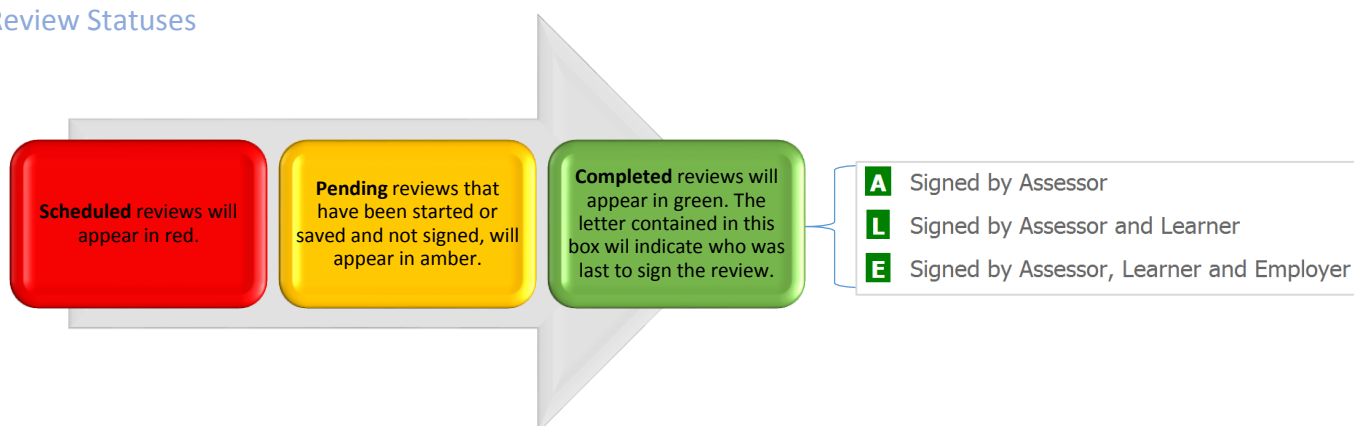| Scheduled Review Date	Actual Review Date	Difference Days (Scheduled/ Actual)	Unit Progress (%)					Overall Progress	Status	Options
			001S	002R	003W	CU681	Level 2			
31/12/2013			Progress is recorded on the day the review is started						🟥 Not started	[Start] [Delete] 📅

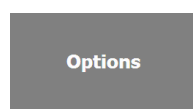The next review date will automatically update based on the following centre setting:

Reviews

☑ New learners created are automatically reviewable

Default review frequency (weeks): [10]

Review Statuses

Scheduled reviews will appear in red.

Pending reviews that have been started or saved and not signed, will appear in amber.

Completed reviews will appear in green. The letter contained in this box wil indicate who was last to sign the review.

[A] Signed by Assessor
[L] Signed by Assessor and Learner
[E] Signed by Assessor, Learner and Employer

Starting Reviews

Options

Start Delete

To start a scheduled review, click the **Start** button shown below the **Options** column.

Note – You may need to scroll to the right of your screen to see these buttons.

Actual Review Date	Scheduled Review Date	Last Review Date	ALN	ASN
28/02/2014 Set today	31/12/2013		Not specifi	Not specifi
The **actual review date** defaults to the date that you click the **start** button. **Set today –** This button will reset the date and re-calculate the progress.	This is the date you **scheduled** your review.	This field will display the date of the **previous review**. The field will be blank if this is your first review with the learner.	If the **Additional Learning/Support Needs** have been specified for a learner, they will appear as **yes** or **no.**	

Progression between reviews

The **unit progression between reviews** section, will show the following columns.

Unit Progression between Reviews

Unit (click to read)	Progress/ Grade at 11/02/2014	Progress/ Grade at 28/03/2014	Anticipated Completion Date	% increase since Last Review
[CU678] Work in a business environment (Level 2)	0%	0%	25/07/2014	--
[CU679] Communication in a business environment (Level 2)	0%	0%	25/07/2014	--
[CU680] Manage own performance in a business environment (Level 2)	0%	13%	25/07/2014	+13%
[CU681] Improve own performance in a business environment (Level 2)	0%	0%	25/07/2014	--
[CT184] Principles of Managing Information and Producing Documents	0%	0%	25/07/2014	--
Overall	**5%**	**5%**	**25/07/2014**	**--**

This column **will not** appear if this is your first review with the learner.

Your **overall** progress since the last review will be shown as a total % at the bottom of this table.

Achievement between reviews

This section will show you any assessments and units that have been **completed**. There will be a references that you can click to access the assessment/unit.

Achievements between Reviews

Assessments Completed	No assessments were completed
Units Signed Off	No units signed off

Achievements between Reviews

Assessments Completed	[CS1] [PRJ1] [PRJ2] [RA1] [WP1] [WP2]
Units Signed Off	[001S] [002R] [003W] [CT183] [CT184] [CU678] [CU679] [CU680] [CU681]

Assessment	Support Method
	Telephone Coaching
PRJ1	✓
WP1	✓

Review for individual units

1. Select the unit from the drop down list.
2. Enter your review into the text box.
3. Click the **Add** button.

You can create multiple reviews for individual units.

Review for all units

Enter your review in the text box. These changes will save when you **sign** or **save** the review page.

Attachments

Any additional documents that you wish add to the review, can be uploaded here.

Feedback & Agreed Action

These 2 sections are quite similar, however they can be used to split up general review feedback and any targets or activities the learner can do before their next review.

This section will be used to summarise the review and give the learner some feedback regarding their assessments, progress etc.

Customising your Reviews

These sections of the review can be removed by a Centre Manager in the Centre Settings.

Display items on review page (you might want to hide (uncheck) these fields if you are using your own forms):

- ☑ Review for individual units
- ☑ Review for all units
- ☑ Attachments
- ☑ Feedback & comments
- ☑ Agreed action

Using Custom Data Forms

Custom Data Forms can be included within reviews, if there is additional information that needs to be recorded.

Here is an example of a custom data form, which has been added to reviews.

Here you can see I have created a form containing additional information that needs to be presented on my review.

Only **Centre Managers** have the ability to create Forms and assign them to the learners.

Information regarding forms can be found by clicking the links below.

How to create Forms & information on fields

A Form will only appear in a learner's Review when the following conditions are met:

- The publish option of the form is set to "Reviews" (Assessor/Learner/Employer).
- The Form is published.
- The Form is assigned to the learner at the point the review was started.

Employer signatures

It is possible to configure your Centre so that the learner's Employer is required to sign the Review after the Learner.

- An Employer can only sign a review if the **Employer** user group is enabled in the Centre Settings.

☐ Employer signature required (a Default Employer must be set for each learner)

- The Employer must be set **Default Employer** on the learner's **Access Accounts** tab.

Default Employer

The Default Employer will receive tasks [Employer, The (Employer) ▾]

If you are a Centre Manager, or an Assessor that can manage learner's accounts, you can assign the default Employer by following the steps below.

1. Open the learner's portfolio.
2. Click the **Access Accounts** tab at the top of the page.
3. Select an **Employer** from the drop down list and **Save** at the bottom.

Declarations

Signed by	Name	Signed	Date
Learner	Amy Farrah Fowler	☐	
Assessor	Sheldon Cooper	☐	08/04/2014
Employer	The Employer	☐	

[Save] [Delete] [Cancel]

The **Employer's signature** section will appear at the bottom of the review, when the learner's account has been correctly configured.