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paperless portfolio

Internal Verifier guide

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The internal verifier

The internal verifier works for a centre. Their role is to monitor and report on the work that is carried out between candidate and assessor(s) in each portfolio they are assigned to. E-qual allows user role names to be altered, so you may be known as, for example, the verifier or the moderator. This does not alter the functionality of the internal verifier role as described below.

Each verifier has access to a number of portfolios for each qualification they are assigned to. Each of these portfolios belongs to a candidate and contains all the work that the candidate and assessor between them have created to help meet the requirements of the qualification.

Each portfolio has a portfolio team. This can consist of any combination of assessor, trainee assessor, internal verifier, external verifier and expert witness advisor. Remember however, these roles could have different names in your portfolios. Each role name can be customised but their range of permissions and abilities in these roles remains the same.

Within each portfolio are various predefined areas containing relevant documents. These documents have been attached by the candidate or an assessor and then commented on. The resulting portfolio of evidence can be accessed, reviewed and sampled at any time by the other members of the portfolio team.

The sections below describe each of the areas of the portfolio that can be accessed in the internal verifier role and how to use them. Online help is also available in the software itself by clicking the **View Help** button at the top right of each page.

Login

To login to E-qual paperless portfolio, enter your username and password into the relevant boxes and click on the **Login** button.

If you cannot remember your username or password, click on the **Forgotten Username or Password** link. This will take you to a page where you can enter the email address that you have in your E-qual account. Your login details will be emailed to this address.

If you require further help with your login to E-qual, contact your administrator.

Select role

It is possible, within your E-qual account, to work with more than one role. If you have 2 or more roles assigned to you, you can use this page to select which of your roles you wish to login as.

In this case we are logging in as the internal verifier role, so click the **Select** button next to Internal Verifier.

If you wish to return to this screen to login using an alternative role, click on the **Change my role** link at the top right of any screen.

Menu

This screen gives you can access all of the Internal Verifiers pages of E-qual.

If you have more than one role assigned to your E-qual account you can click the **Change my role** link at the top right to return to the Choose role page and enter E-qual as another role.

You can change your password and personal details by clicking the **Change my details** link. This will take you to a page that allows you to edit your those details.

Click the **Logout** link at any time to leave the E-qual system and return to the login page.

Manage Portfolios

This page allows you to review details about any assessors and candidates assigned to you and lets you gain access to their portfolios.

The users you are responsible for are displayed in a tree structure with you at the top of the tree, your assessors at the next level and the candidates below them. Details about these users are displayed when you click on their names.

When you click on a candidate's name, the general details about that user are displayed together with a qualification table containing any qualifications you are responsible for with this user. Information about those portfolios are displayed in the following columns:

Percentage Completed: This is the progress of each portfolio. It shows the percentage of the qualification they have completed. This is calculated from the number of nodes in the qualification that have been locked or marked as completed.

Assessor last access: The date and time when an assessor last accessed that portfolio.

Candidate last access: The date and time when the candidate last accessed that portfolio.

Nodes completed: The number of nodes that have been marked as completed by the role before you in the Completion order. This can be used as a guide to tell you how many nodes are ready for you to verify.

Click the **View portfolio** button to access a portfolio.

Planner

The Planner provides a method for adding events against an assessor.

The current month is displayed. Clicking on the **Next** or **Previous** links at the top of the calendar moves the planner one month forward or backward. To select a particular month, click the current month title. The display will change to a table of months. Click the name of the month you require or click the **Next** or **Previous** links to move forward or back a year.

To add an event, click on the date you require. A pop-up window allows you to choose the user, the qualification, the reason and time of the event. Click **Save** to add the event to the planner. A number of events can be added to the same day by repeating the process.

To delete an entry click on the cross (**X**) button to the right of the event.

If any of your assessors have events entered into their planners, an **assessor events** button will be displayed next to the date. Click the button to display a summary of events added by your assessors on that day.

Reporting

The reporting page displays your verification sampling and the current situation of portfolios you are assigned to.

When you access one of the portfolios you are assigned to, on each page is a Verification panel where you can answer verification questions, select parts of the qualification structure that you have sampled and make comments about the portfolio. This information is accessed on the reporting page. For more details about this see ***Verification***.

To view reports, select a qualification from the dropdown. A sampling report of all your assessors will appear for that qualification will appear.

This report shows the number of candidates assigned to each qualification and each part of a qualification under each assessor. It then displays how much sampling you have carried out for each area and percentage totals. Every time you select a part of the qualification structure on your 'verification panel' in a portfolio, it is added to this report as being sampled.

You can then select an assessor from the assessor dropdown or by clicking on the name of the assessor in the table. This will display a report of sampling you have carried out for each candidate under that assessor.

Both of these sampling reports are compiled between 2 dates. The default is from 1 year ago to today. You can alter the 'Date from' and 'Date to' by clicking on the **select date** buttons. Changing these dates will update the sampling reporting to show all sampling that took place between your new dates selected.

If you then select a candidate from the candidate dropdown or click on a candidate's name in the table, a current portfolio status report will be displayed. This shows answers to any verification questions you have completed, the nodes that you have sampled to reach these answers and your verification comments.

You can continue to use the dropdowns and date selectors to navigate to different roles and users against different sampling periods and qualifications. You can obtain guidance about what each sampling amount means by holding your cursor over the numbers. A tooltip will briefly appear explaining what that figure represents.

Forums

Forums are where you can share conversations, opinions, work and documents with other E-qual users.

The top page displays any groups of forums that you have been assigned to by forum administrators. You are free to read and contribute, where appropriate, to any of the forums displayed. If you do not have any forums assigned to you the Forums area will not be visible to you.

These forum groups contain topics. You can view the contents of the topics by clicking on the title.

Some forum owners will allow you to create your own topics in the forum. If this is the case, a **Create topic** button will be visible below the forum. Click the button and enter your topic title and description into the pop-up window to create your topic.

Topic

The topic page contains a list of all the discussions within the topic you have selected. It gives you details such as who started this discussion, when the last post was added and how many posts there are in total. You can read the posts within a discussion by clicking the discussion title.

You can return to the forums level by clicking the **My forums** link at the top left of the forums area or by clicking the **Go back** button.

Some forum administrators will allow you to add new discussions to this topic. To do this, click the **Add discussion** button. You can then enter the title of the discussion, the text that will be the first post in this discussion and, if you want to, attach a document. Click **Save** when you are finished. Your discussion will be created with your post as the first post.

Discussion

This is the post level of the forums. It is where new messages are added to create a conversation in this discussion area. You can read the posts that have been created, and in most cases, reply to an existing post or create a new post.

To reply to an existing post, click the **Reply** button below the relevant post, this will open a pop-up window. In this window you can edit the title of your post, enter you post text and attach a file if required. You will notice that because you choose to reply to an existing post, the text from the first post is added to the post in [quote] tags.

To post a new relevant post in this discussion, click the **Add post** button. This will open a pop-up that will allow you to add a title and the text of your post. You can also attach a document.

You can add some styling to your post by using the **Bold** and **Italic** buttons. Select the text you wish to style in the post window and click the **Bold** and/or **Italic** buttons. This will place the relevant tags in your text which will display with the correct styling when you save your post.

You can use the navigation links on the left to move around the forums or click the **Go back** button to move up to the discussions level.

Resources

The resources area is where other roles can add documents, links and other content and learning to be shared among E-qual users.

Users can assign resources to you. Any resources you have been allocated will appear on this page. If you do not have any resources assigned, the Resources area will not be visible to you.

To access an individual resource, click the **Open resource** button. This will open the resource in a new window.

Resources can be individual files, groups of files or learning materials or a link to another web site.

Viewing portfolios

As an internal verifier you are able to view the portfolios of all candidates you are assigned to. This means you can view the work in the portfolio and use your 'Verification' window when sampling to make decisions about how the work and assessment process is progressing.

You also have the facility to leave messages for assessors and external verifiers in relation to the work taking place in the portfolio. Then finally, as parts of the qualification structure are satisfactorily completed, you can mark each part as Completed, eventually leading to a 100% completed portfolio.

Whilst you are carrying out this verification role, other portfolio team members - candidates, assessors and external verifiers - can be working in the portfolio or monitoring the process as frequently as they require.

The sections below describe each of the areas of the portfolio that can be accessed once you have clicked the **View portfolio** button in the 'Manage Portfolios' area, and how to use them.

Portfolio menu

This menu screen gives you access to all areas of the portfolio. To visit a particular area of the portfolio click the relevant menu button.

At the bottom of the menu screen are the details of the Portfolio Team. These are the people are working with you on this portfolio.

Just above the portfolio team area is the percentage complete figure. This is the amount of your portfolio that has been locked by the assessor(s) and is considered 'finished'.

To the right of the page is the discussion area. See ***Discussions*** for help with using this feature.

To return to the Manage portfolios page, click **Exit this portfolio** in the top menu bar or the **Exit portfolio** button.

Discussions

The Portfolio menu contains a Discussions area. This is where you can converse with some of the people involved in this portfolio or in some cases, read discussions between other users of the portfolio. The Discussions area is also accessible from each page of the portfolio using the Discussions button in the Tools panel.

At the top of the discussions area is the name of the person you are having a discussion with. If you have the option of talking to more than one person this area will feature a dropdown menu containing a list of all the discussions you can contribute to or read. Click on the menu and select the person that you wish to leave a message for.

To add a text entry to the active discussion, type your entry into the text area at the bottom and click the **Submit** button. The message will be added at the top of the active discussion, together with details of the date and time the entry was added.

NOTE: Care should be taken when using the Discussions area as you are not able to remove entries once the have been added.

When you view a portfolio, any new discussions that have been added for your attention since your last view will be marked by a red star. This star will disappear once you have accessed that new entry.

Verification

The Verification panel is for monitoring portfolios and providing reports on the sampling you have carried out.

The panel is split into 3 areas - Verification questions, Nodes sampled and Comment.

The **Verification questions** are a set of predefined verification questions, split into sections, that you should answer as you sample the content of the portfolio. To answer a question, select the appropriate response using the tick boxes and the method you used to come to this decision from the dropdown menu.

The **Nodes sampled** area displays the qualification structure. As you answer the verification questions you should tick any area of the structure that you have viewed in coming to your conclusions. These selections are added to your sampling report in the reporting area.

The **Comment** tab is an area for you to make comments as you carry out your verification of the portfolio. Simply type into the text box to add any comments.

All entries in the Verification window will be added to your Verification report and be visible to assessors and external verifiers.

When you have finished adding to your verification click **Close** and all entries will be saved to your report for that portfolio.

Planning

This area is used by the assessor to select the parts of a qualification to be undertaken by the candidate and as a place to store assessment planning documentation. The page contains an area to add planning documents to the left and the standard for the qualification as a tree structure to the right.

A file can be viewed by selecting the filename in the **Attached planning documents** area and clicking the **Open file** button.

Assessors can lock documents, to prevent them from being removed, if they are considered to be suitable for inclusion in the final portfolio. Locked documents cannot be removed from the portfolio.

The qualification the candidate is attempting is represented as a tree structure. The plus (+) and minus (-) icons allow the tree to be opened and closed to show more or less nodes. Clicking on node text selects that statement, indicated by a highlight around the statement. Each node also contains an area for the assessor to enter a start date, a proposed completion date and an actual completion date.

Start Date is a date when work on the particular statement will start.

Proposed Completion Date is a date when work on the particular statement is planned to end.

Actual Completion Date is a date when work on the particular statement has been completed.

The selected tick box (**SEL**) allows the assessor to choose which parts of the qualification structure the candidate should attempt. Any statements selected here will become visible and available to attach evidence to in the Portfolio Evidence area.

The Tools area at the bottom of the page gives you access to your discussions. Click the **Discussions** button to open them in a pop-up window. If you have new discussions, the button will have a new star displayed. See ***Discussions*** for help with using this feature. Also in the Tools area is the **Verification** button. Clicking this button will open the Verification pop-up window. See ***Verification*** for help with using this feature.

General Documents

This area is designed to contain general documents that are part of the portfolio but not necessarily documents that contribute to the main qualification structure. They could be documents that contain details about the candidate, items such as a CV or certificates, or general portfolio administration documents and induction documentation.

A file can be viewed by selecting the filename in the **Attached general documents** area and clicking the **Open file** button.

Assessors can lock documents, to prevent them from being removed, if they are considered to be suitable for inclusion in the final portfolio. Locked documents cannot be removed from the portfolio.

The Tools area at the bottom of the page gives you access to your discussions. Click the **Discussions** button to open them in a pop-up window. If you have new discussions, the button will have a new star displayed. See ***Discussions*** for help with using this feature. Also in the Tools area is the **Verification** button. Clicking this button will open the Verification pop-up window. See ***Verification*** for help with using this feature.

Portfolio Evidence

This page is the main area of the portfolio, used to attach evidence and comments to the appropriate parts of the qualification structure.

The standard for the qualification is shown on the left in a tree structure. The tree only contains the parts of the qualification that have been selected in the Planning area. The plus (+) and minus (-) icons allow the tree to be opened and closed to show more or less nodes.

Alongside each branch of the tree there may be several icons displayed. These are intended to provide information about the status of the node.

 The small document icon indicates that there is evidence attached to that statement.

 The small bubble icon indicates that a comment has been attached to that statement.

 The padlock icon indicates whether a node has been locked. A node can be locked to prevent changes to the attached items if the documents and comments are satisfactory to complete that part of the qualification. When a node has been completed the padlock becomes a 'Completed' icon 

To the right of the tree is the **Documents attached to selected node** area and the **Comments attached to selected node** area. This is where documents and comments are added and displayed as part of the completed portfolio.

A file can be viewed by selecting the filename in the **Documents attached to selected node** area and clicking the **Open file** button.

The Tools area at the bottom of the page contains buttons to enable you to access useful additional tools.

Click the **Discussions** button to open the Discussions area in a pop-up window. If you have new discussions the button will have a new star displayed. See ***Discussions*** for help with using this feature.

You can see a tabular view of the evidence and comments and where they have been attached by clicking the **Matrix** button. See Matrix for help with using this.

Also in the Tools area is the **Verification** button. Clicking this button will open the Verification pop-up window. See **Verification** for help with using this feature.

Matrix

The matrix is a tabular representation of where documents and comments are attached to the qualification structure.

The qualification structure is represented as a tree diagram showing two levels at a time - the nodes you are wanting to show documents for, and their parent node. The matrix always opens at the top level of the qualification structure. That is, showing the short name of the qualification as the parent node and then the collection of child nodes below.

Down the left of the matrix is a list of all documents that are attached at that level of the qualification structure and any levels below. The matrix then shows, by a number of symbols, where each document has been attached.

✓ The tick indicates that the document has been attached at this node in the qualification structure.

↓ The arrow indicates that the document has been attached at a lower level - a child node of the current node - in the qualification structure

✓ ↓ The tick and arrow indicates that the document has been attached at this node of the qualification structure and has also been attached at a lower level - a child node of the current node - in the qualification structure.

Each document listed in the matrix can be opened in its native application by clicking on the document name.

The Comments section of the matrix indicates any comments that have been added at these nodes. Their position in the qualification structure is indicated by a small speech bubble icon in the column of the node they are attached to. Move your mouse over the comment to read the full text.

To navigate up or down the levels of the qualification structure, simply click on the **Up** or **Down** buttons. Alternatively, you can use the ‘You are here’ links at the top of the matrix to move back up through the levels.

You can print the matrix for easy reference.

Completion

The Completion page is used for indicating which areas of the qualification have been Completed. As an Internal Verifier, you may be required to agree that areas of the qualification are finished.

The nodes of the qualification structure that require marking as Completed are displayed in a tree structure. When you are able to make your completion decision on a node, the tick box under your role name will become active.

If you are happy with the work on this node and it is your turn in the Completion sequence, tick the box. A date will be displayed next to your tick box. The tree works hierarchically, that is, if you tick a node with lower nodes, all of those lower, child nodes, will also be ticked.

You can change your mind and remove the tick as long as the next person in the Completion sequence has not ticked their box.

Once a node has been marked as Completed by the first person in the sequence, that node is locked on the Portfolio Evidence page and the Completion icon is displayed against the nodes and attached documents. Documents and comments cannot be added, removed or edited on that node.

Once the whole qualification has been Completed, all documents in all areas of the portfolio are locked.