



# IQA Basics

Sampling Policies

# Sampling Policies

## Overview

Creating a sampling policy allows you to specify what percentage of an Assessor's learners should be sampled and what percentage of their units should be sampled. You can also specify which methods should be sampled and how much of the sampling should be summative or interim. Once a policy has been created, it can be assigned to a Tutor and you can ask OneFile to make the policy compliant by automatically adding the sampling into the sampling table.

## User Restrictions

Users with the **Can manage sampling policies** permission will be able to create and assign sampling policies. Only Centre Managers, Lead IQAs or IQAs can be granted the above permissions.

The following table explains how each user, who has granted permissions to manage or assign sampling policies, can access the sampling policies.

User Group	Section	Type
Centre Manager	Quality	Icon
Lead IV	Lead IV Options	Link
IV	IV Options	Link

# Creating Sampling Policies

To create a sampling policy, click on the **Sampling Policies** icon or link, then click the **Create new sampling policy** button. If no sampling policies exist, you will automatically be taken to the **Manage Sampling Policies** page.

1. Enter the **policy** name.
2. Specify which % of the Tutor's **learners** should be sampled.
3. Specify what % of those learner's **units** should be sampled.

4. Specify how much of the sampling should be summative and how much should be interim.

5. Specify which methods should be included within the sample.  
*(**Weight Sample x2** - Include the selected method two times more than the other methods that are included)*

Method	Selection
APL	Do not sample
Case Study	Include
Expert Witness Testimony	Do not sample
Observation	Weighted sample (x2)
Oral Questions	Do not sample

6. Click the **Save** button to save the sampling policy.

Policy Name	Learners %	Units %	Summative / Interim %	Methods	In Use	Options
40/20 I:40 S:60	40	20	60 / 40	6	No	<a href="#">Edit</a> <a href="#">Delete</a>
50/50 I:80 S:20	50	50	20 / 80	7	No	<a href="#">Edit</a> <a href="#">Delete</a>

# Assigning Sampling Policies

To assign a sampling policy, click on the **Sampling Policies** icon or link. If a sampling policy has already been created, you will automatically be taken to the **Assign Sampling Policies** page.

When on the Assign Sampling Policies page, you will see a list of Assessors that you are linked to

User Group	Visible Tutors
Centre Manager	All
Lead IQA	Tutors linked by the IQA
IQA	Tutors linked by the Learner

To assign a sampling policy, follow the steps below:

1. Tick the check box of the Tutor(s).
2. Select the sampling policy from the drop down list.
3. Click the Assign button. Once the sampling policy has been assigned to the Tutor, you will be able to see if the policy is compliant.

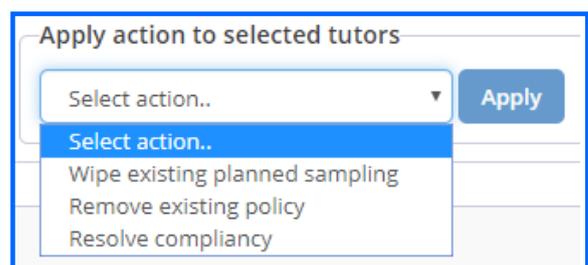
If a sampling plan already exists, you will be able to see if the existing plan is compliant or not. The planned sampling can be manually edited by the IQA and the Compliancey column will turn green once the required amount of sampling has been planned.

# Resolving the Compliancey

If the existing sampling plans aren't compliant, you can attempt to resolve the compliancey. Doing this will automatically insert methods and add task reminders into the IQAs sampling table & calendar.

To attempt to resolve a compliancey, follow the step below:

1. Tick the check box of the Assessor, who is assigned to a sampling policy.
2. Select the action **Resolve Compliancey** from the drop down list.
3. Click the **Apply** button.



# Continued...

If the process has been successful, you will see that the policy is now compliant.

Select	Assessor	Caseload	Sampling Policy	Compliance
<input type="checkbox"/>	Baker, Carla	13 / 10	40/20 I:40 S:60	

You can now view the **Unit Sampling** table to see the planned sample that has been automatically generated.

Attempting to resolve a compliance will not only create the sampling plans, but also schedule task reminders to the IQA to complete interim sampling on dates, which will appear in the IQA **Calendar**.

## IMPORTANT

In some scenarios it may be impossible for the requested percentages and number of methods to be applied accurately to the sampling table. This depends on the number of learners in the Tutor's caseload and how many units each of the learners are working towards. The algorithm used to automate the sampling plan will round up or down to the closest value.

## Wipe existing planned sampling

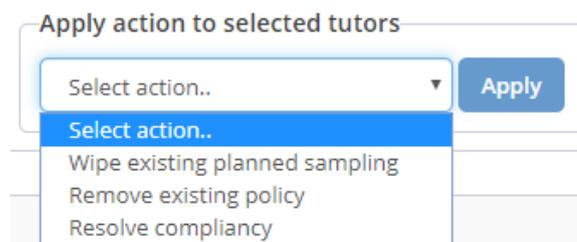
To wipe all the existing sampling plans of the selected Tutor, follow the steps below:

1. Tick the check box of the Tutor.
2. Select the action **Wipe existing planned sampling** from the drop down list.
3. Click the **Apply** button.

## Remove Existing Policy

You can remove a policy from a Tutor, by following the steps below:

1. Tick the check box of the Tutor.
2. Select the action **Remove existing policy** from the drop down list.
3. Click the **Apply** button.



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