

W E L C O M E

Internal quality assurer guide



Welcome to OneFile

Supporting over 600,000 users worldwide, OneFile is the UK's leading eportfolio for learning and development – and winner of the 2017 Queen's Award for Innovation.

As an internal quality assurer, you'll be able to view the learners entire portfolio and make judgements on assessment plans and assessments. You'll also be able to record assessor observations and candidate interviews.

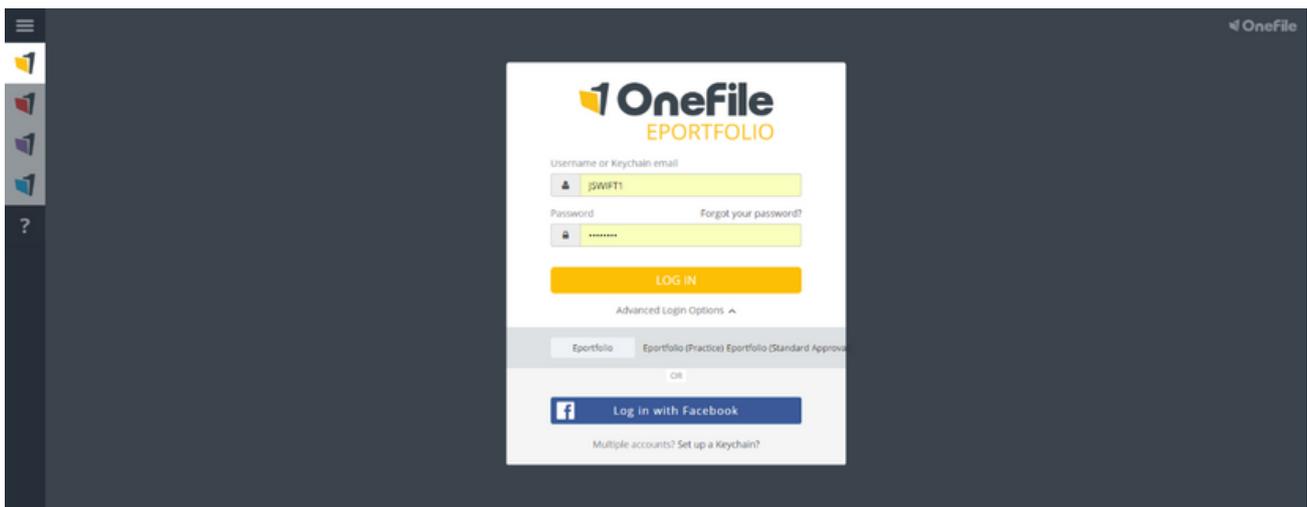
This guide will provide you an overview of the features you can use as an IQA, and provide you with tips and tricks to make the most of OneFile.

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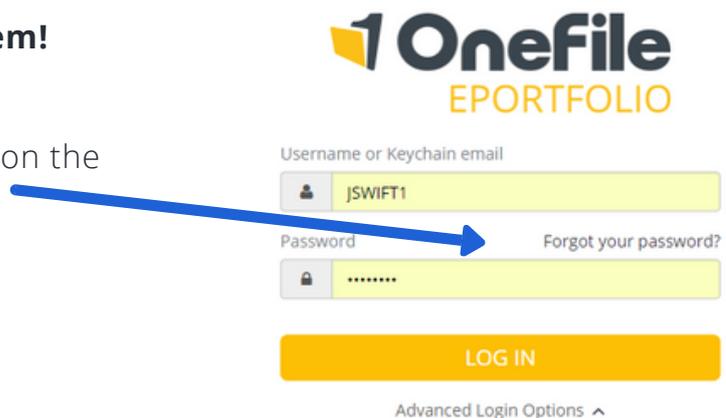
Logging into your account

To login, navigate to <http://www.onefile.co.uk/> then select the Login button on the top right corner of the homepage. Please enter your OneFile login credentials in the username and password fields. The details are case sensitive, so they need to be typed exactly as displayed.



Lost your password? No problem!

If you've forgotten your password, just click "Forgot your password?" on the log-in screen.



Then, enter the email address associated with your account and click "Continue". A new password will now be produced and sent to your registered email address.

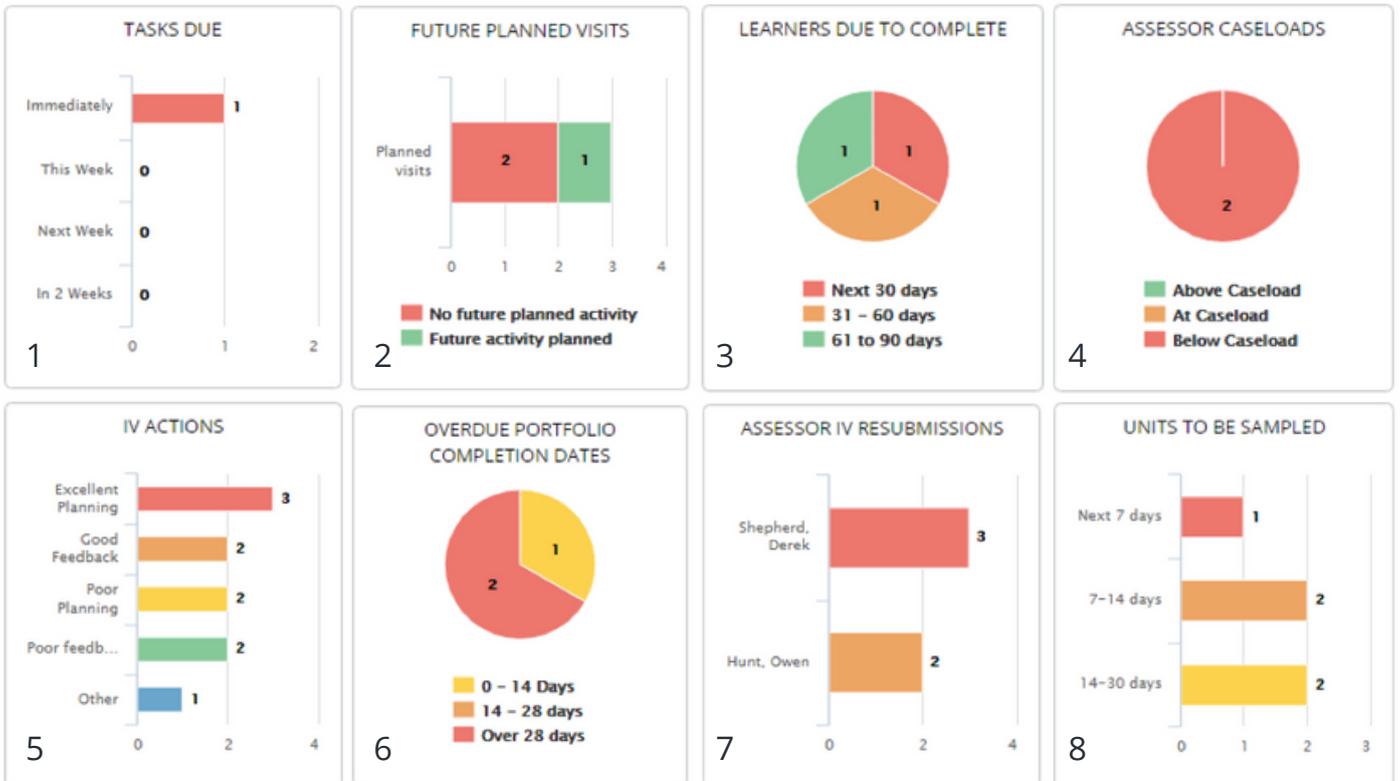
Reset Password

Please enter your email address and we'll send you a link to reset your password

[Continue](#) [Return to log in](#)

Dashboard charts

Click the graphs to see the data behind them.



1. Tasks due - shows all tasks by timescale

2. Future planned visits - shows the number of planned visits the assessor has created

3. Learners due to complete - shows the number of learners who are due to complete by date

4. Assessor caseloads - shows the number of assessors who are above, at, or below their target caseload (if a target caseload has been set by a centre manager)

5. IV actions - lists the number of actions you've selected when sampling assessments

6. Overdue portfolio completion dates - shows the number of learners who have passed their planned completion date

7. Assessor IV resubmissions - shows the number of outstanding resubmissions by assessor

8. Units to be sampled - shows sampling planned to take place within a specified time period

If you're unable to see any of the dashboards above, please speak to a centre manager, who will be able to activate them for you.

Homepage icons

The screenshot shows a table titled 'Assessors' with the following columns: Assessor (click for unit sampling), Date Last Login, Caseload, Tasks Outstanding, Units Resubmitted, Units Signed Off In Last 30 Days, Sampling Policy/Compliance, and Options. Two assessors are listed: Owen Hunt and Derek Shepherd. The 'Options' column for each assessor contains links for Assessment Plans, Assessments, Assessor Observations, Journal, and Assessor Calendar. Numbered callouts (1-11) point to: 1. Assessor name, 2. Caseload value, 3. Tasks Outstanding value, 4. Units Resubmitted value, 5. Units Signed Off value, 6. Sampling Policy/Compliance cell, 7. Assessment Plans link, 8. Assessments link, 9. Assessor Observations link, 10. Journal link, and 11. Assessor Calendar link.

| Assessor (click for unit sampling) | Date Last Login | Caseload | Tasks Outstanding | Units Resubmitted | Units Signed Off In Last 30 Days | Sampling Policy/Compliance | Options |
|------------------------------------|------------------|----------|-------------------|-------------------|----------------------------------|----------------------------|--|
| Hunt, Owen Offline | 10/08/2016 15:41 | 1 | 3 | 0 | 0 | | Assessment Plans Assessments Assessor Observations Journal Assessor Calendar |
| Shepherd, Derek Offline | 09/08/2016 11:17 | 2 | 4 | 0 | 0 | | Assessment Plans Assessments Assessor Observations Journal Assessor Calendar |

1. Assessors assigned to your caseload
2. Number of learners in that assessor's caseload
3. Number of outstanding tasks with the assessor
4. Number of units resubmitted back to the assessor
5. Number of units the assessor has signed off within the last 30 days
6. Confirms if your current unit sampling table complies with the sampling policy created by your centre manager (if applicable)
7. Link to assessment plans created by the assessor
8. Link to assessments per assessor
9. Assessor observation forms (if applicable)
10. An area for you to add comments within the assessor's journal. The assessor can't view these comments
11. Link to the assessor's calendar

Please note: centres may have changed the titles of each icon, but the icon will remain the same. If you can't access any of the icons, please contact your training provider. This is due to the permissions you've been granted.

Homepage navigation

Enter a learner's name in the search box below to find a specific learner. To see all learners assigned to you, just click Search.

Learners ▼

Search part of name:
Search
Clear
 Include Archived Learners

| Learner Name | Episode Name | DOB | Class | Learning Aim(s) - Opens Unit Sampling Table | Assessor | Internal Verifier | Award Reg | Options |
|-----------------|--------------|-----|---------------|---|----------------|-------------------|-----------|----------------------------|
| Karev, Alex | AKAREV1 | | Medical 15-16 | Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010) | Derek Shepherd | Richard Webber | | Interviews |
| Stevens, Isobel | ISTEVENS1 | | Medical 15-16 | Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010) | Owen Hunt | Richard Webber | | Interviews |
| Yang, Christina | CYANG1 | | Medical 15-16 | Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010) | Derek Shepherd | Richard Webber | | Interviews |

More IV Options

- | | |
|--|--|
| <ul style="list-style-type: none"> 1 → Assessment plan schedules 2 → Assessor observations 3 → Calendar 4 → Centre resources | <ul style="list-style-type: none"> 5 → IV-ready assessments 6 → Learner interviews 7 → Sampling policies 8 → Forms |
|--|--|

1. Lists the number of assessment plans all assessors in your IQA caseload have created
2. View a list of any completed assessor observations. This is an optional feature
3. View your calendar
4. View any resources that have been uploaded by centre managers.
5. View any assessments that are available to be internally verified for assessors in your caseload
6. If your centre has a learner interview form enabled, you can complete them here or look back at previously completed forms
7. Allows you to manage sampling policies, if given permission by your centre manager
8. View forms that have been created for learners in your caseload

Introduction to sampling plans

It's important to create a sampling plan, as this will drive your IQA process. Before you begin, you'll need to be linked to the learners as the default IQA. If you're an additional IQA, you can sample evidence sent to you, but you can't create a sampling plan.

Sampling plans can be created in two ways:

- **single mode**
- **multi mode**

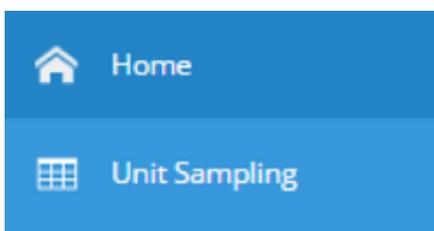
Single mode allows you to select a specific learner and unit. Once selected, you can choose the method(s) that need to be sampled, along with any planned processes. You can also set an activity reminder.

Multi mode allows you to select multiple learners, units and processes, and apply them all at once. This method is useful when you've been allocated several new learners at once.

Planned processes are set by the centre manager, and can include activities like assessor observations and file checks.

Activity reminders can be set up to alert you that you plan to carry out an interim or formative sampling activity against a specific learner on a specific date.

To get started, clicking Unit Sampling on the sidebar.



You can then view existing sampling tables by selecting an IQA and/or learning aim from the drop-down lists, and clicking Submit. The Assessor and Class filters are optional. Once you've applied these filters, you'll be able to see all the learners assigned to you, and the saved units those learners are working towards.

Creating a sampling plan in single mode

When the sampling table has been created using the filters, single mode sampling appears by default.

To add a sampling activity, click the planned end date for the unit in the unit sampling table for your chosen learner.

IV Unit Sampling Table (3) Learner selection:

Simple
 Planned Sample with Anticipated Completion Dates
 Actual Sample with Unit Signed Off Dates
 Advanced
 Show Pending Unit Rejections
 Show Assessment Processes

| Learner Name ▲ | Started | Unit 1 |
|----------------|------------|-------------|
| Karev, Alex | 05/08/2016 | 05 Feb 2017 |

Tick the assessment methods you would like to sample for the unit. The colours correspond to boxes you'll see later in the sampling table.

Planned Sampling Method

Select which assessment method you intend to sample for this learner Note: Only the methods applicable to the Class are displayed. Please refer to your Centre Manager to add or remove assessment methods.

Select:

APL
 Case Study
 Expert Witness Testimony
 Observation
 Oral Questions
 Professional Discussion
 Project
 Reflective Account
 Witness Testimony
 Work Product
 Written Questions

Select any processes you would like to sample. At this stage, only select planned processes.

Assessment Process

| | |
|---|---|
| <input type="checkbox"/> Assessor Feedback | <input type="checkbox"/> Assessor Feedback |
| <input type="checkbox"/> Assessor Observation | <input type="checkbox"/> Assessor Observation |
| <input type="checkbox"/> Candidate Interview | <input type="checkbox"/> Candidate Interview |
| <input type="checkbox"/> Final Sample | <input type="checkbox"/> Final Sample |
| <input type="checkbox"/> Planning | <input type="checkbox"/> Planning |

Check the task reminder box if you would like to receive a task reminder for the sampling activity you have selected. Task reminders are used for formative/interim sampling. Once complete, click save. Colour coded boxes will appear against the learner and unit selected.

| Learner Name ▲ | Started | Unit 1 |
|----------------|------------|---|
| Karev, Alex | 05/08/2016 | 05 Feb 2017  |

Creating a sampling plan in multi mode

Click 'Learner selection: single mode' to switch to multi-mode.

Learner selection: [Single-mode](#)

Learner selection: [Multi-mode](#)

Tick the sampling methods and assessment processes you would like to sample. Assessment processes are set up by your centre manager, so if you can't see any, you may not have any processes enabled at your centre. If you are selecting processes, please select only planned processes at this stage.

Planned Sampling Method

Select which assessment method you intend to sample for this learner. Note: Only the methods applicable to the Class are displayed. Please refer to your Centre Manager to add or remove assessment methods.

| | |
|--|---|
| <input type="checkbox"/> APL | <input type="checkbox"/> Case Study |
| <input type="checkbox"/> Expert Witness Testimony | <input type="checkbox"/> Observation |
| <input checked="" type="checkbox"/> Oral Questions | <input checked="" type="checkbox"/> Professional Discussion |
| <input type="checkbox"/> Project | <input type="checkbox"/> Reflective Account |
| <input type="checkbox"/> Witness Testimony | <input type="checkbox"/> Work Product |
| <input type="checkbox"/> Written Questions | |

Assessment Process

| | |
|---|---|
| Planned process: | Actual process: |
| <input checked="" type="checkbox"/> Assessor Feedback | <input type="checkbox"/> Assessor Feedback |
| <input type="checkbox"/> Assessor Observation | <input type="checkbox"/> Assessor Observation |
| <input checked="" type="checkbox"/> Candidate Interview | <input type="checkbox"/> Candidate Interview |
| <input type="checkbox"/> Final Sample | <input type="checkbox"/> Final Sample |
| <input type="checkbox"/> Planning | <input type="checkbox"/> Planning |

[Apply to Table >](#)

If you opt to set a task reminder, this will prompt you to carry out interim sampling. Then add any additional comments that are applicable.

Task Reminder

Set a task reminder for this sampling activity on date:

[Apply to Table >](#)

Additional Comments

[Apply to Table >](#)

[Apply all to Table >](#)

Tick the box for the unit(s) and learner(s) you'd like to add this sampling plan to. Once selected, click Apply all to table to add the information into your sampling plan.

Select at least an IV or a learning aim

Select an IV: Learning Aim: Assessor:

Class: Archived Learners: Include

IV Unit Sampling Table (3) Learner selection: Zoom table:

Simple
 Planned Sample with Anticipated Completion Dates
 Actual Sample with Unit Signed Off Dates
 Advanced
 Show Pending Unit Rejections
 Show Assessment Processes

| Learner Name ▲ | Started | Unit 1 | Unit 2 |
|-----------------|------------|--|---|
| Karev, Alex | 05/08/2016 | <input type="checkbox"/> 24 Feb 2017  | <input type="checkbox"/> 24 Feb 2017  |
| Stevens, Isobel | 05/08/2016 | <input type="checkbox"/> 01 May 2017  | <input checked="" type="checkbox"/> 01 May 2017  |
| Yang, Christina | 18/05/2016 | <input type="checkbox"/> 01 Apr 2017  | <input type="checkbox"/> 01 Apr 2017 |

You can remove planned sampling from the table by ticking the box for the unit date. From there, remove any ticks in the assessment methods, assessment processes and leave the task reminder and comments sections blank. Click Apply all to table to clear the data assigned to that unit(s).

Introduction to sampling evidence

Now your sampling plan has been set up, any sampling activity will be driven through the plan. You will receive email and task alerts in your IQA account to carry out sampling activities, including:

- Planned sample activities
- Signing off unit summaries
- Resampling previously rejected assessments

Planned sample activity tasks are generated by the sampling plan. When you select the task, it will take you to the specific unit you chose to sample. Displayed under the unit heading will be any assessments completed within this unit. If there are no assessments to sample and the unit has no progress, you have two options:

- adjust the activity date through the plan to a future date
- select an alternative unit to sample where progress is present

Once you've completed the interim sampling, hide the task.

Unit summary tasks are automatically generated once a unit is at 100%, has met all required assessment rules and has been signed off by both the learner and the assessor. Click to open the task and display all of the assessments linked to the unit. You can then choose how many assessments to sample based on your IQA strategy.

A task to **resample** previously rejected assessments will be automatically created once an assessor has adjusted the rejected assessment.

Sampling assessments

When you're in an assessment, select the criteria you would like to sample by ticking the checkboxes next to each one. If you'd like to select all the criteria at once, click All.

Criteria

Tick boxes to: Sample checked criteria Select: All None

[201] English Functional Skills at Level 2

[E201] Speaking listening and communication

Performance Criteria

- [1.1] - Consider complex information and give a relevant, cogent response in appropriate language
- [1.2] - Present information and ideas clearly and persuasively to others
- [1.3] - Adapt contributions to suit audience, purpose and situation
- [1.4] - Make significant contributions to discussions, taking a range of roles and helping to move discussion forward

When you select the criteria, the description will change colour. If you'd like to resubmit any criteria in the assessment, leave the boxes unchecked.

Feedback & Comments

Feedback to: Derek Shepherd (Assessor)

Tahoma, ... 12px A B I U abc

x² x₂ Aa aA abc

I agree with your decision, Derek.

Words: 6 Characters: 34

Create task to acknowledge this feedback

Add Message Attachment

Message attachments are for feedback and comments only and should not be used for the submission of evidence towards this assessment.

Nothing is attached

Send Now

Add feedback to the assessment by clicking the 'Feedback to' dropdown list. This will allow you to change the recipient of the feedback.

You should only click the green Send Now button if you're sending feedback to someone other than the assessor. If you're leaving feedback for the assessor, this will automatically be sent when the assessment is signed off.

To accept the assessment decisions made by the assessor, click the Accept radio button below and select the appropriate assessment judgement.

Internal Verifier (invisible to Learner)

Assessment decision:
 Accept
 Resubmit - Send back to Assessor

Assessment judgements:
 Safe Fair Valid Reliable

IV for Derek Shepherd (Assessor)

Actions:

- Evidence insufficient to meet standards (1)
- Excellent Planning (3)
- Forgetting Attachments (0)
- Good Feedback (2)
- Incorrect method used to assess knowledge and understanding (1)
- Insufficient authentication of evidence (0)
- Other (1)
- Overclaiming criteria (1)
- Poor Planning (1)
- Poor feedback to Learners (2)
- Slow Learner Progress (0)

You can then select IV actions for the assessor. IV actions are an optional feature which can be enabled by your centre manager.

The number in brackets indicates the number of instances this action has been chosen previously.

| Visit Type | Assessor Travel Time (minutes) | Assessor Assessment Time (minutes) | Learner Assessment Time (minutes) |
|---------------|--------------------------------|------------------------------------|-----------------------------------|
| Not specified | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="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 checked="" type="checkbox"/> | 27/10/2016 14:37 |
| I agree that the information provided here is an accurate account of what has taken place | Derek Shepherd (Assessor) | <input checked="" type="checkbox"/> | 27/10/2016 14:38 |
| I have sampled this evidence as part of my verification sample | Richard Webber (Internal Verifier) | <input checked="" type="checkbox"/> | 27/10/2016 15:02 |
| I have sampled this evidence as part of my verification sample | External Verifier | <input type="checkbox"/> | |

Save & Refresh Save & Quit Cancel

It's good practice to Save & Refresh the assessment as you go. When the sampling is complete, tick the Signed on Completion box, then click Save & Quit.

Resubmitting assessments

If you disagree with any part of an assessment, you can resubmit it back to the assessor. To do this, leave any criteria that you want to be resubmitted unticked.

Criteria

Tick boxes to: Sample checked criteria Select: All None

[201] English Functional Skills at Level 2

[E201] Speaking - listening and communication

Performance Criteria

- [1.1] - Consider complex information and give a relevant, cogent response in appropriate language
- [1.2] - Present information and ideas clearly and persuasively to others
- [1.3] - Adapt contributions to suit audience, purpose and situation
- [1.4] - Make significant contributions to discussions, taking a range of roles and helping to move discussion forward

In the assessment decision section, check Resubmit - Send back to Assessor. If the unit summary has already been signed, you can choose to Unlock or Resubmit the unit.

Internal Verifier (invisible to Learner)

Assessment decision:

- Accept
- Resubmit - Send back to Assessor
 - Resubmit against Unit 1 (Unit needs resubmitting or unlocking)
 - Unlock Unit
 - Resubmit Unit

Assessment judgements:

- Safe
- Fair
- Valid
- Reliable

Unlock unit unlocks the unit summary first so the assessment can be amended.

Resubmit unit works similarly, but also assigns the reference [R] to this unit in the unit sampling table.

If you choose to resubmit a unit, you won't be able to sign it unless you leave feedback. Tick the box to sign on completion, then click Save & Quit. This will send a task to the assessor explaining that they need to resubmit the assessment. If applicable, the relevant unit summary will also be unlocked.

Signing a unit summary

A unit summary task will automatically be generated when a unit reaches 100%.

| Learner Name | Learning Aim | Awarding Body Reg. |
|----------------|---|--------------------|
| Christina Yang | Edexcel BTEC Level 2 Award in Paediatric First Aid (QCF) (Oct 2010) | Pending |

[Unit 1] Paediatric Emergency First Aid

| Unit 1 | Progress | Total |
|---|---|-------|
| [1.1] Understand the role of the paediatric first aider | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |
| [1.2] Be able to assess an emergency situation and act safely and effectively | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |
| [1.3] Be able to provide first aid for an infant and a child who is unresponsive and breathing normally | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |
| [1.4] Be able to provide first aid for an infant and a child who is unresponsive and not breathing normally | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |
| [1.5] Be able to provide first aid for an infant and a child who has a foreign body airway obstruction | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |
| [1.6] Be able to provide first aid to an infant and a child who is wounded and bleeding | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |
| [1.7] Know how to provide first aid to an infant and a child who is suffering from shock. | <div style="width: 100%; height: 10px; background-color: green;"></div> | 100% |

Related Assessments

IV Planned Sample Method(s): **Work Product (Formative, Planned Process: Final Sample)**

| Assessment Method | Assessment References |
|-------------------|-----------------------|
| Observation | OB1 |
| Project | PRJ2 PRJ4 |

Any units you've sampled previously as an IQA will appear red in the related assessments section. You can then leave feedback, select the unit status from the dropdown list, sign off the unit summary and save.

Internal Verifier (Invisible to Learner)

Unit Status: Select an action...

- Select an action...
- Unit completed - not sampled
- Unit completed - sampled
- Resubmission required

Assessors

Competence has been demonstrated in all of the elements of this unit using the required assessment procedures and any special conditions/contexts. The evidence meets the requirements for sufficiency, authenticity, currency, reliability and validity.

| | Name | Signed | Date |
|-------------------|----------------|--------|------------|
| Assessor | Derek Shepherd | ☑ | 02/11/2016 |
| Internal Verifier | Richard Webber | ☐ | 02/11/2016 |

Learner Declaration

I confirm that the evidence presented for this unit is authentic and a true presentation of my own work. I am satisfied with the way the assessment(s) was conducted and with the outcome(s).

| | Name | Signed | Date |
|---------|----------------|--------|------------|
| Learner | Christina Yang | ☑ | 02/11/2016 |

Save
Cancel

Glossary

Actual completion date

A date that is automatically populated when a unit reaches 100% and has been signed off.

Actual formative sampling date

Once a planned activity has been completed, the sampling plan will automatically update with the actual date the formative sampling was carried out.

Formative sampling

Formative, or interim, sampling means to sample a learner's portfolio part way through their programme, and prior to completion. The purpose of formative sampling is to quality check prior to completion.

IQA actions

IQA actions usually refer to key quality areas such as feedback or planning. In OneFile, they are created by the centre manager.

IQA strategy

Your IQA strategy will detail the amount and type of sampling that should be completed. This may vary depending on the awards and individual. This is usually determined based on the experience of the team.

Planned completion date

The date the assessor has chosen as their planned completion date for an individual unit.

Planned formative sampling date

This date is automatically populated in the sampling plan by setting an activity reminder.

Sampling plan

A detailed plan of learners, units and dates that IQA activities should be carried out. Sampling plans should be created in line with your IQA strategy.

Summative sampling

When a unit reaches 100%, the IQA will carry out a summative sample. The IQA will decide how many assessments to sample prior to signing the unit off.

FAQs

Do I need to sign off every unit as an IQA?

No. Your centre manager is able to switch off the requirement for an IQA to sign off every unit. If you choose to do this, it's important that you have alternative plans in place to ensure quality sampling takes place, such as by setting formative tasks. Your sampling plan will also tell you which units need to be sampled before they're signed off.

Can I send work to another IQA to sample?

Yes. If a learner is linked to an additional IQA, you can reassign any of your tasks to them. This is particularly useful if a learner has swapped assessors and there is a conflict of interest.

What do the different assessment colours mean?

A blue assessment hasn't been sampled. A red assessment has been sampled by an IQA. A green assessment has been sampled by an EQA.



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