REFRESHED WALLED GARDEN

QUALITY PORTAL USER GUIDE

MAY 2016

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QUALITY PORTAL

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1. WHAT IS THE QUALITY PORTAL?

The Quality Portal is a **new area in the Walled Garden**. It is designed for you to **manage your Quality Assurance online**, **interacting** with the Quality Team and External Quality Assurers (EQAs).

In the Quality Portal you can:

- Submit Qualification Approval Application (QAP) forms and review their progress.
- View details of your qualification approval status and allocated EQAs.
- View your past and future activities, and review their progress.
- View Centre Activity Reports (CARs).
- View Qualification Approval Visit reports (QAPv)
- Submit visit planning (CA2) forms and view visit confirmation (PA1) forms.
- Submit Centre Update (CU) forms.

See Appendix 2 for a description of the different Quality profiles and what you can do with each.

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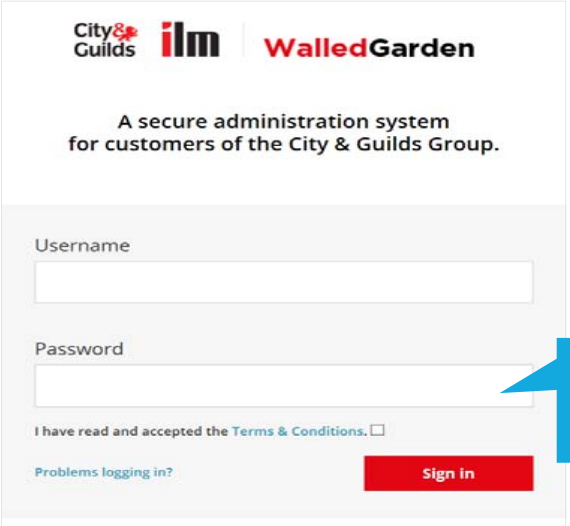
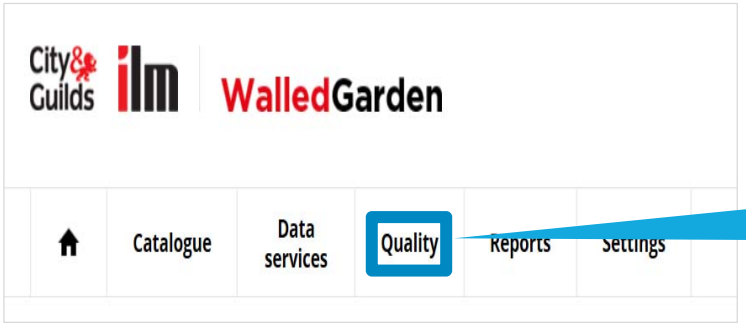
QUALITY PORTAL

2. LOGGING IN

1. Go to www.walledgarden.com

2. 

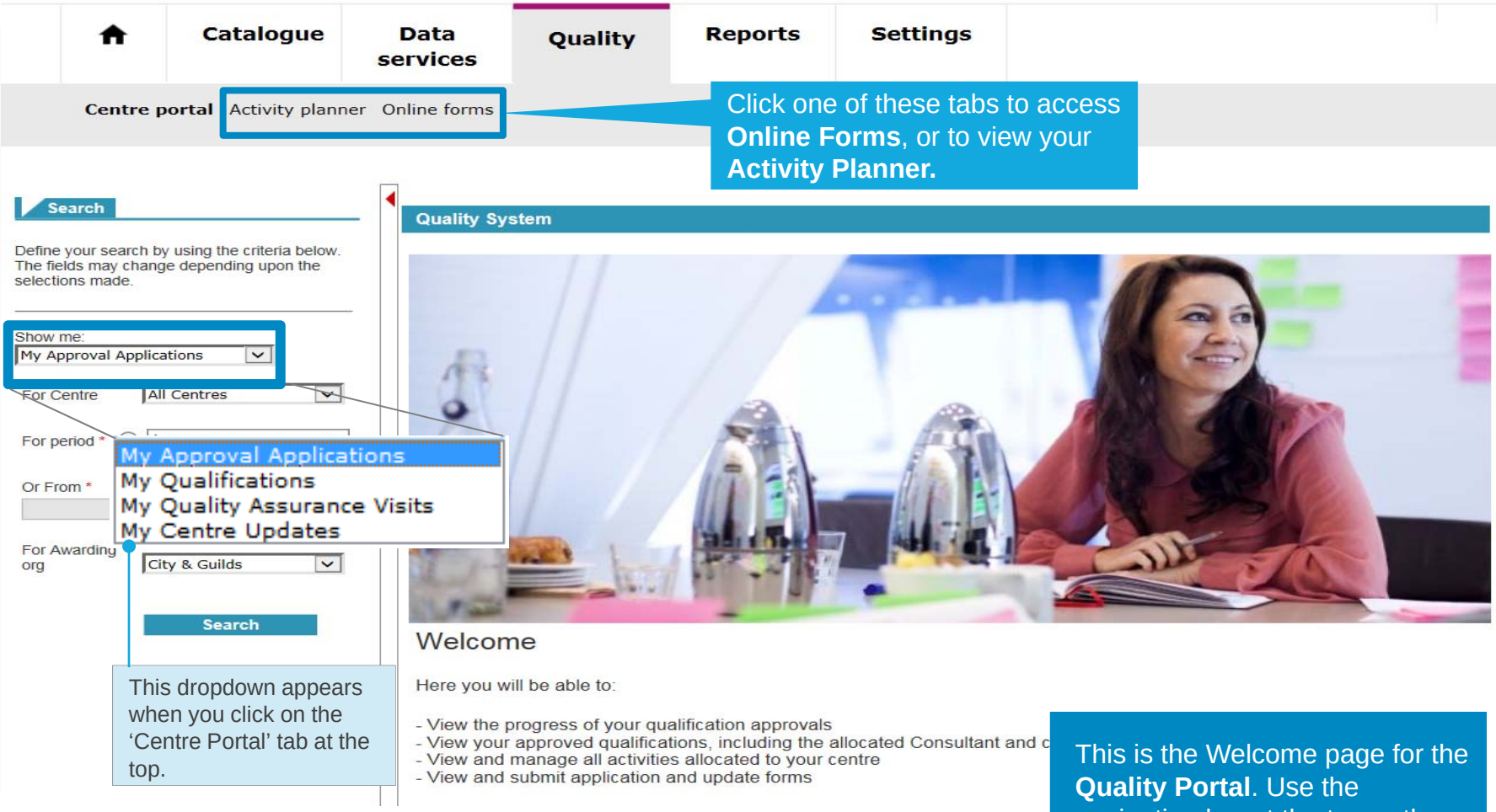
Enter your Walled Garden **user ID** and **password**.

3. 

Click on the **Quality** tab to access the Quality Portal.

QUALITY PORTAL

3. WELCOME PAGE



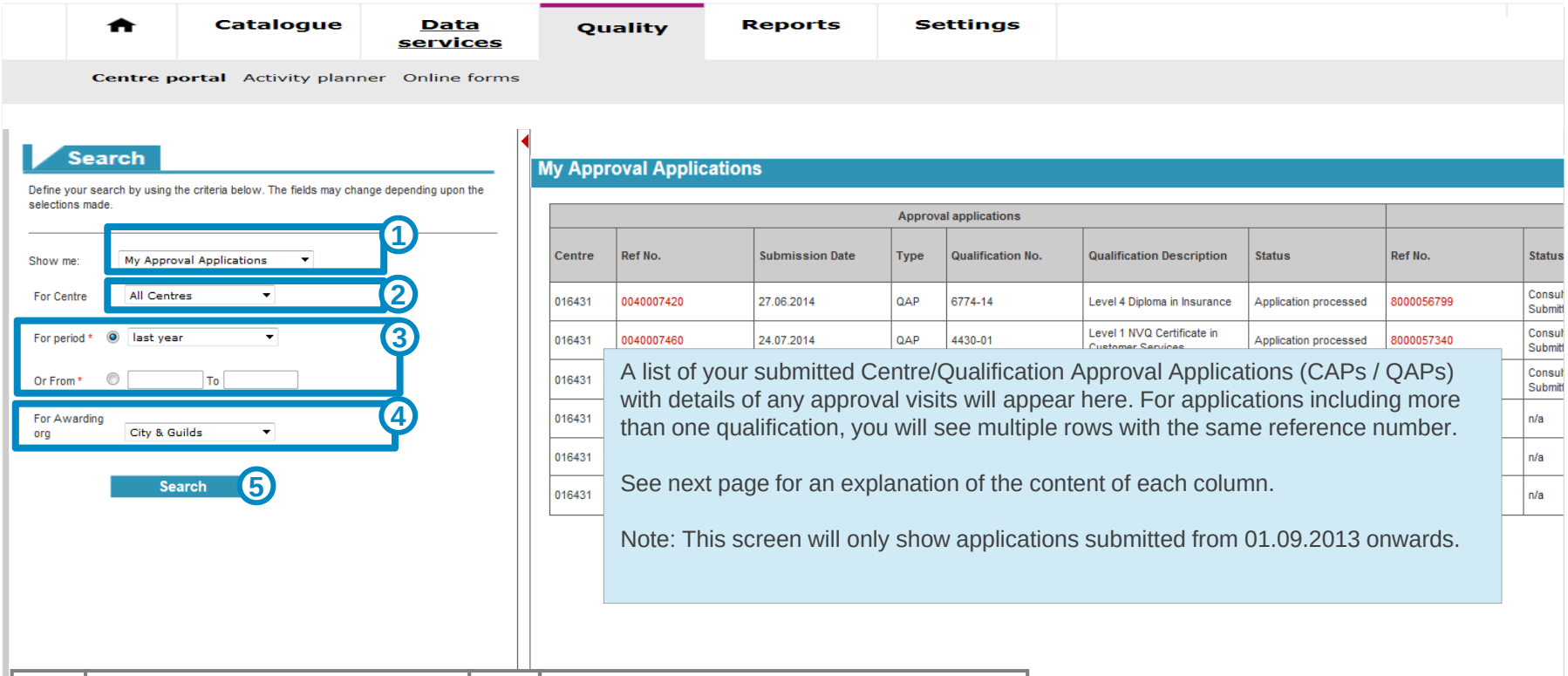
Click one of these tabs to access **Online Forms**, or to view your **Activity Planner.**

This dropdown appears when you click on the 'Centre Portal' tab at the top.

This is the Welcome page for the **Quality Portal**. Use the navigation bar at the top or the dropdown menu to access the different sections.

QUALITY PORTAL

4. MY APPROVAL APPLICATIONS



A list of your submitted Centre/Qualification Approval Applications (CAPs / QAPs) with details of any approval visits will appear here. For applications including more than one qualification, you will see multiple rows with the same reference number.

See next page for an explanation of the content of each column.

Note: This screen will only show applications submitted from 01.09.2013 onwards.

1	Choose **My Approval Applications**.	3	Specify a time period for the date when the application form was submitted.
2	Choose a **centre number** from dropdown menu. This only applies if you have access to multiple centre numbers or suffixes.	4	Keep 'City & Guilds' selected (only change this if you work with ILM).
		5	Click **Search**.

View any **Centre/Qualification Approval Applications** (CAPs / QAPs) you have submitted.

QUALITY PORTAL

4. MY APPROVAL APPLICATIONS

The centre number for which you submitted the application (if more than one was selected)

The date when you submitted your application.

The qualification you applied for.

The reference number for the approval visit (if applicable). Click to open the Qualification Approval report (QAPv)

(See Online Forms section for details)

Date initially suggested by the Quality Team.

Date agreed between you and the Consultant.

My Approval Applications

Approval applications							Approval visits (if required)				
Centre	Ref No.	Submission Date	Type	Qualification No.	Qualification Description	Status	Ref No.	Status	Planned Visit date	Actual Visit date	Report submitted date
016431	0040007420	27.06.2014	QAP	6774-14	Level 4 Diploma in Insurance	Application processed	8000056799	Consultant/EV Report Submitted	01.07.2014	15.07.2014	27.06.2014
016431	0040007460	24.07.2014	QAP	4430-01	Level 1 NVQ Certificate in Customer Services	Application processed	8000057340	Consultant/EV Report Submitted	24.07.2014	24.07.2014	24.07.2014
016431	0040007470	11.08.2014	QAP	6502-93	Level 3 Award in Education and Training (unit route)	Application processed	8000057455	Consultant/EV Report Submitted	11.08.2014	11.08.2014	18.09.2014
016431	0040007480	11.08.2014	QAP	6502-97	Level 5 Diploma in Education and Training (unit route)	Approval visit in progress	8000057662	Visit Scheduled	15.08.2014	20.08.2014	00.00.0000
016431	0040007490	11.08.2014	QAP	6503-51	Level 5 Diploma in Teaching English: Literacy	Application received	n/a	n/a	n/a	n/a	n/a
016431	0040007491	11.08.2014	CAP	6560-02	Level 2 NVQ Certificate in Wall and Floor Tiling (Construction)	Application stopped	n/a	n/a	n/a	n/a	n/a

The reference number for your application. Quote if you need to contact us. Click to open the application form you submitted.

(See Online Forms section for details)

The type of application: Centre Approval (CAP) or Qualification Approval (QAP)

The status of your application.

(See next pages for an explanation of each status.)

The status of the approval visit.

(See next pages for an explanation of each status.)

Date when the QAPv was submitted.

YOUR APPROVAL APPLICATION STATUS

The table below lists all the different statuses for your Centre and Qualification Approval Applications and what they mean to you.

APPLICATION STATUS	MEANING
Application received	We have received you application, but we have not started to process it yet.
Approval visit in progress	A Centre/Qualification Approval visit or remote approval activity is being arranged/carried out.
Application processed *(only for Qualification Approvals)*	Your Qualification Approval Application has been processed. Please note this could either be approved or rejected. The Quality Team will be in touch with you to inform you of the outcome.
Application stopped	Your Centre/Qualification Approval Application has been stopped by us, or at your request.
Application on hold	Your Centre/Qualification Approval Application has been put on hold by us, or at your request.
Credit check in progress *(only for Centre Approvals)*	Our Finance Department is completing the credit check and processing the payment of your Centre Approval Fee.
Credit check approved / rejected *(only for Centre Approvals)*	Your credit check has been successful. The Quality Team will allocate an EQA to organise an approval visit.
Credit check rejected *(only for Centre Approvals)*	Your credit check has been unsuccessful. The Quality Team will be in touch with details of how to proceed.
Centre application approved / rejected *(only for Centre Approvals)*	Your Centre Approval Application has been approved / rejected.

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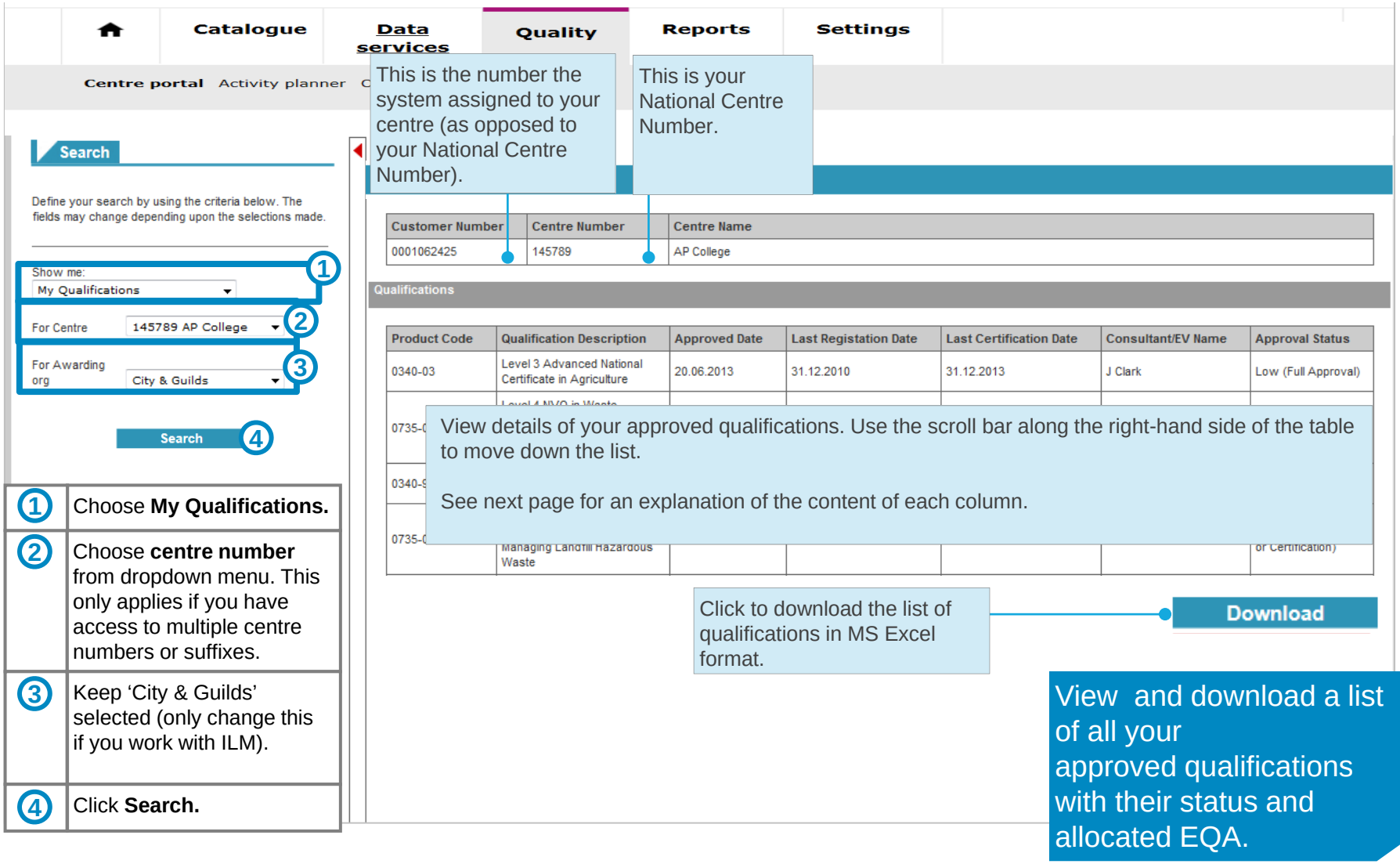
YOUR APPROVAL VISIT STATUS

Not every Qualification Approval Application will require an approval visit. If we organise an approval visit, it will be identified on the table with a reference number (800xxxxxxx). The status of the visit will be displayed as follows:

APPLICATION STATUS	MEANING
Consultant/EV assigned	An EQA has been allocated, and they will contact you to schedule a date.
Visit Scheduled	You have agreed a visit date with the EQA.
Consultant/EV Report submitted	The Qualification Approval report (QAPv) is ready to view.
Consultant/EV Reallocation	Occasionally, we may need to reallocate an activity to a different EQA. If that happens, you may see this status temporarily.

QUALITY PORTAL

5. MY QUALIFICATIONS



1	Choose **My Qualifications.**
2	Choose **centre number** from dropdown menu. This only applies if you have access to multiple centre numbers or suffixes.
3	Keep 'City & Guilds' selected (only change this if you work with ILM).
4	Click **Search.**

View and download a list of all your approved qualifications with their status and allocated EQA.

QUALITY PORTAL

5. MY QUALIFICATIONS

Catalogue | Data services | Quality | Reports | Settings

Centre portal | Activity planner | Online forms

Search

Define your search by using the criteria below. The fields may change depending upon the selections made.

Show me: My Qualifications

For Centre: 145789 AP College

For Awarding org: City & Guilds

Search

Quality Ratings

Customer Number	Centre Number	Centre Name
0001062425	145789	AP College

Qualifications

Product Code	Qualification Description	Approved Date	Last Registation Date	Last Certification Date	Consultant/EV Name	Approval Status
0340-03	Level 3 Advanced National Certificate in Agriculture	20.06.2013	31.12.2010	31.12.2013	J Clark	Low (Full Approval)
0735-02	Level 4 NVQ in Waste Management Operations: Managing Landfill Non-hazardous Waste	20.06.2013	15.04.2011	31.12.2013	J Clark	Approval withdrawn
0340-93	Level 3 Advanced National Certificate in Agriculture	20.06.2013	31.12.2010	31.12.2013	J Clark	Low (Full Approval)
0735-01	Level 4 NVQ in Waste Management Operations: Managing Landfill Hazardous Waste	20.06.2013	15.04.2011	31.12.2013	J Clark	High (No Registration or Certification)

Qualification details

Date when you were approved

Last Registration and Last Certification date, according to our Catalogue.

Your allocated EQA for this qualification

Your approval status for this qualification

(See next page for an explanation of each status.)

YOUR QUALIFICATION APPROVAL STATUS

The table below lists all the different statuses for your Qualification Approvals and what they mean to you.

APPROVAL STATUS	MEANING
Low (Full Approval)	You can register and certificate for this qualification.
Medium (Registration only)	You can register, but you cannot certificate for this qualification.
High (No Registration or Certification)	You can neither register nor certificate for this qualification.
Qualification Approval Rejected	Your qualification approval application was unsuccessful, and you have not been approved to run this qualification.
Approval withdrawn	Your approval has been withdrawn by the Quality Team.
Application withdrawn	You have told us you no longer want to go ahead with your approval application.
Approval lapsed (no activity)	There have been no registrations/certifications on this qualification for two years, so your approval has expired. You need to contact the Quality Team to discuss how to re-activate it if you wish to do so.

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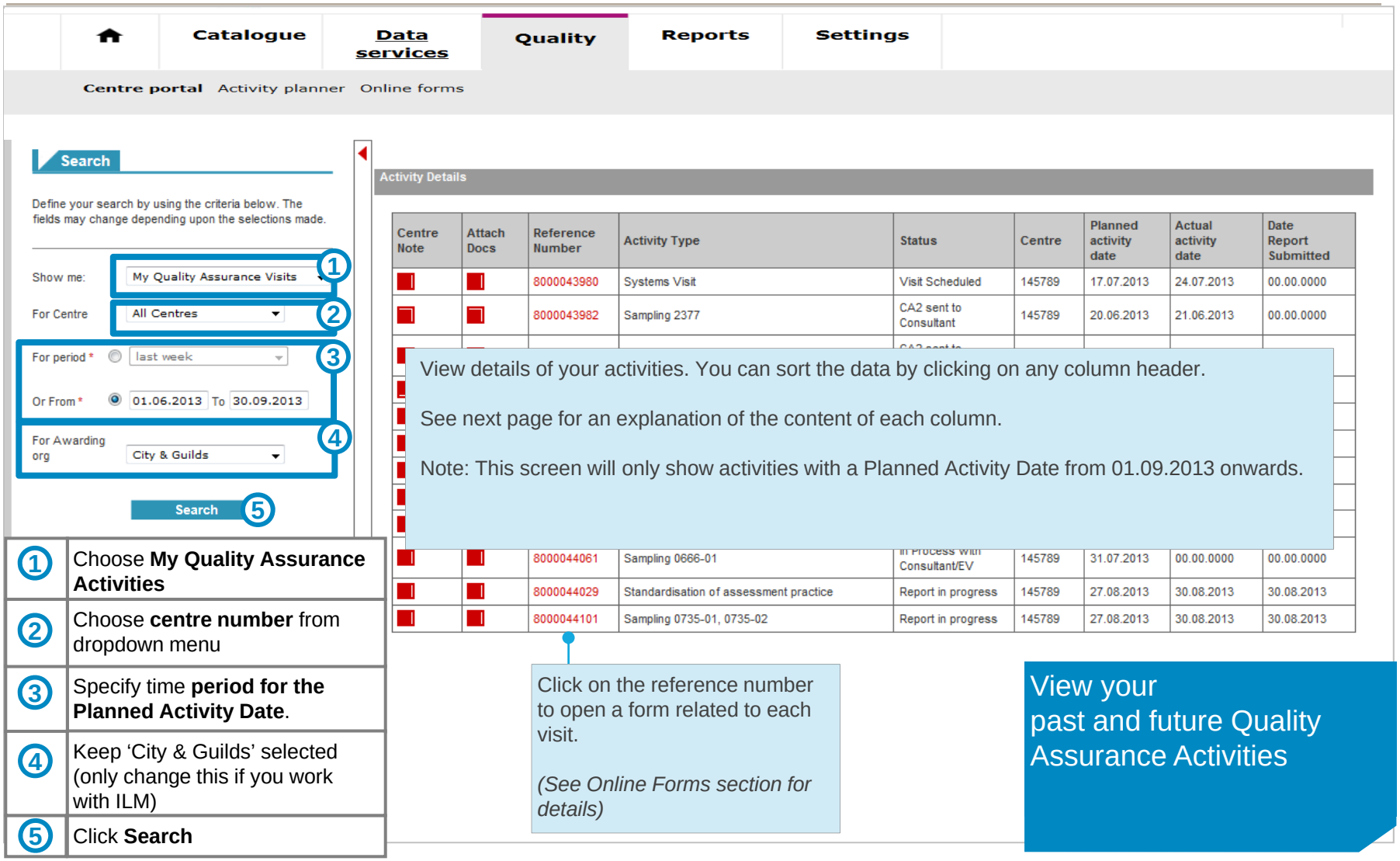
QUALITY PORTAL

6. MY QUALITY ASSURANCE ACTIVITIES



View details of your activities. You can sort the data by clicking on any column header.

See next page for an explanation of the content of each column.

Note: This screen will only show activities with a Planned Activity Date from 01.09.2013 onwards.

1	Choose **My Quality Assurance Activities**
2	Choose **centre number** from dropdown menu
3	Specify time **period for the Planned Activity Date**.
4	Keep 'City & Guilds' selected (only change this if you work with ILM)
5	Click **Search**

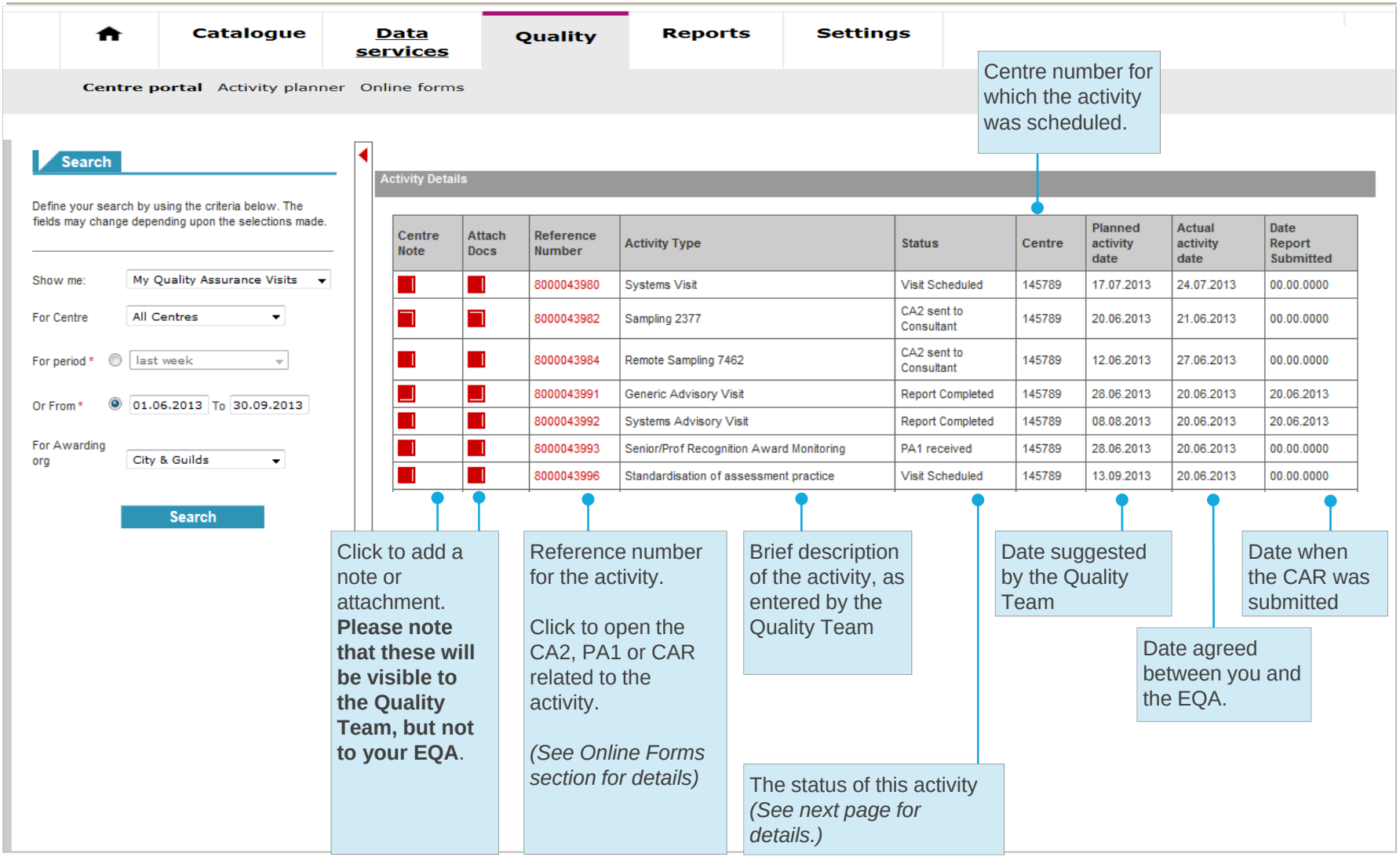
Click on the reference number to open a form related to each visit.

(See Online Forms section for details)

View your past and future Quality Assurance Activities

QUALITY PORTAL

6. MY QUALITY ASSURANCE ACTIVITIES



Centre Note	Attach Docs	Reference Number	Activity Type	Status	Centre	Planned activity date	Actual activity date	Date Report Submitted
		8000043980	Systems Visit	Visit Scheduled	145789	17.07.2013	24.07.2013	00.00.0000
		8000043982	Sampling 2377	CA2 sent to Consultant	145789	20.06.2013	21.06.2013	00.00.0000
		8000043984	Remote Sampling 7462	CA2 sent to Consultant	145789	12.06.2013	27.06.2013	00.00.0000
		8000043991	Generic Advisory Visit	Report Completed	145789	28.06.2013	20.06.2013	20.06.2013
		8000043992	Systems Advisory Visit	Report Completed	145789	08.08.2013	20.06.2013	20.06.2013
		8000043993	Senior/Prof Recognition Award Monitoring	PA1 received	145789	28.06.2013	20.06.2013	00.00.0000
		8000043996	Standardisation of assessment practice	Visit Scheduled	145789	13.09.2013	20.06.2013	00.00.0000

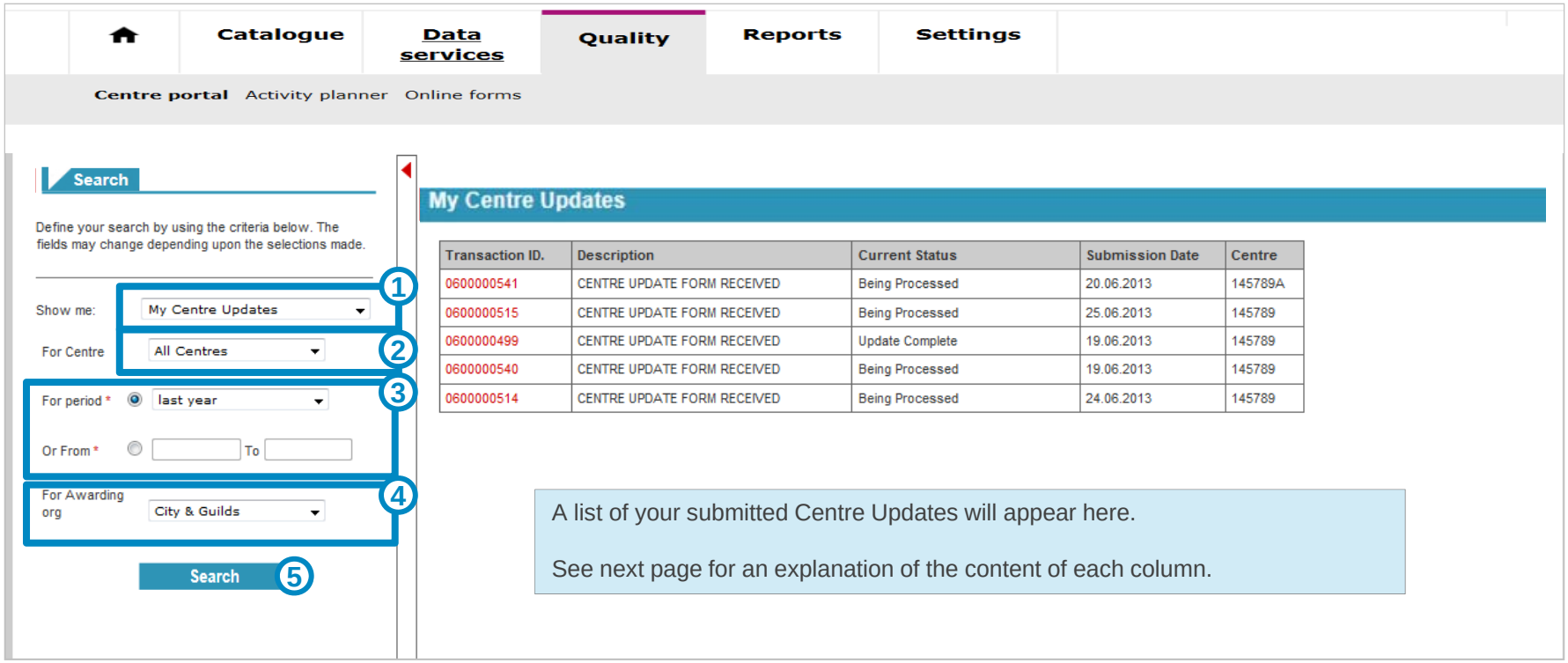
ACTIVITY STATUS

The table below lists all the different statuses for your Activities and what they mean to you.

ACTIVITY STATUS	MEANING
In Process with Consultant/EV	An EQA has been instructed to carry out this activity. He/she will contact you to agree a date.
Visit Scheduled	An activity date has been agreed between you and your EQA. If the activity does not involve sampling, there is nothing else for you to do until the day of the activity.
CA1 received *(Only applicable to sampling activities)*	The Quality Team has emailed you the CA1 with the details of the activity. You now need to submit a CA2 form online. (*See Online Forms section for details.)*
CA2 sent to Consultant *(Only applicable to sampling activities)*	You have submitted a CA2 form. The EQA now needs to submit a PA1 form online.
PA1 received *(Only applicable to sampling activities)*	The EQA has submitted a PA1 form online. You can view it by going to the Online Forms tab, and using the reference number for the activity (800xxxxxxx). (*See Online Forms section for details.)*
Report in Progress	The EQA has submitted the Centre Activity Report (CAR) and the Quality Team is currently reviewing it. The Report is not available for you to view at this stage.
Report Completed	The Quality Team has processed the Centre Activity Report (CAR) and it is now available for you to view. You can do this by clicking on the reference number for the activity (800xxxxxxx). (*See Online Forms section for details.)*
Consultant/EV Reallocation	Occasionally, we may need to reallocate an activity to a different EQA. If that happens, you may see this status temporarily.

QUALITY PORTAL

7. MY CENTRE UPDATES

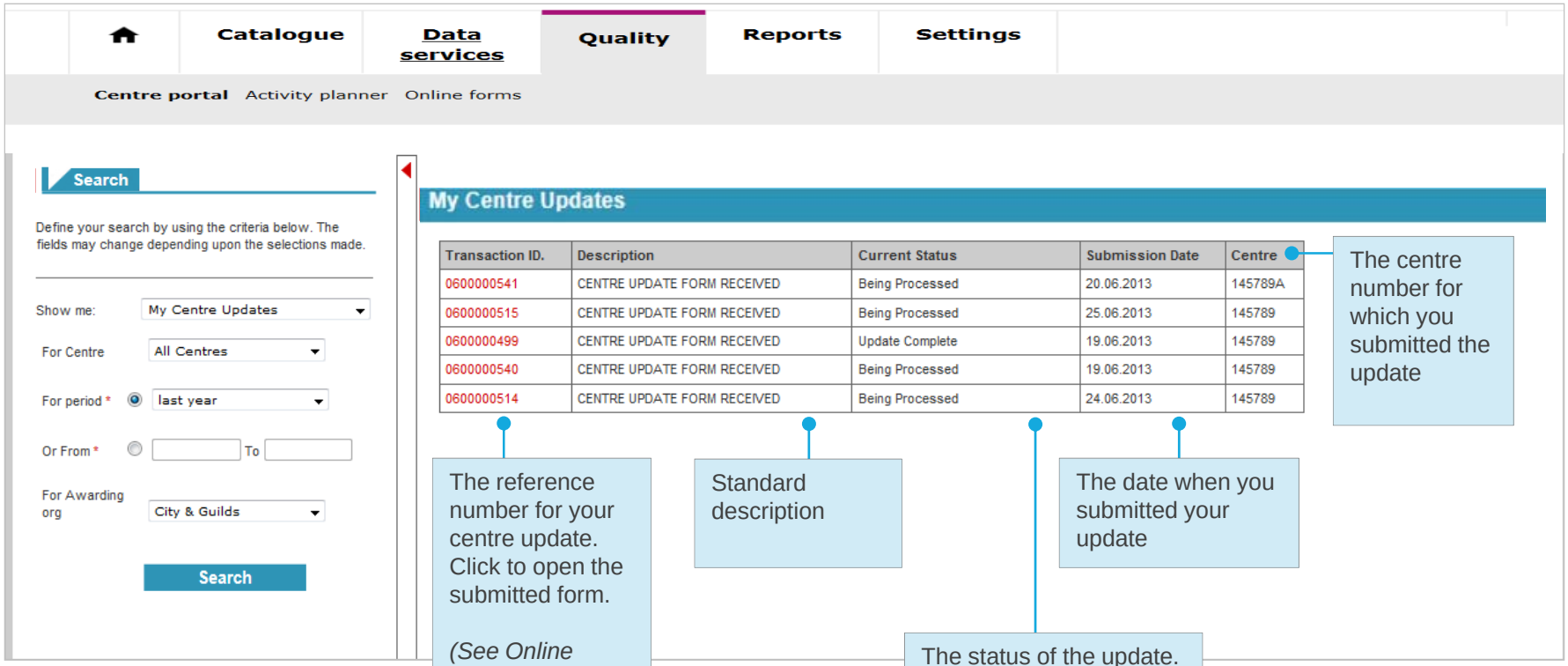


1	Choose **My Centre Updates**	3	Specify a time period for the date when the update was submitted.
2	Choose **centre number** from dropdown menu. This only applies if you have access to multiple centre numbers or suffixes.	4	Keep 'City & Guilds' selected (only change this if you work with ILM)
		5	Click **Search**.

View details of any **Centre Update forms** you have submitted.

QUALITY PORTAL

7. MY CENTRE UPDATES



Transaction ID.	Description	Current Status	Submission Date	Centre
0600000541	CENTRE UPDATE FORM RECEIVED	Being Processed	20.06.2013	145789A
0600000515	CENTRE UPDATE FORM RECEIVED	Being Processed	25.06.2013	145789
0600000499	CENTRE UPDATE FORM RECEIVED	Update Complete	19.06.2013	145789
0600000540	CENTRE UPDATE FORM RECEIVED	Being Processed	19.06.2013	145789
0600000514	CENTRE UPDATE FORM RECEIVED	Being Processed	24.06.2013	145789

The centre number for which you submitted the update

The reference number for your centre update. Click to open the submitted form.

(See Online Forms section for details)

Standard description

The date when you submitted your update

The status of the update. Options are:

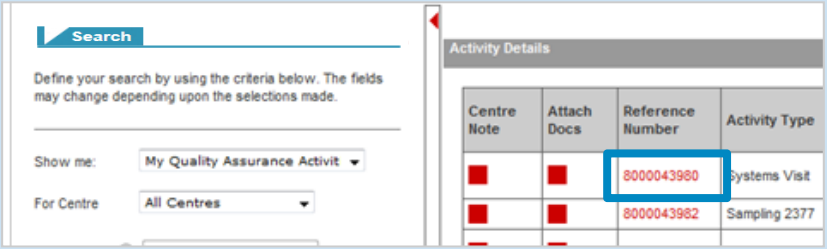
- Being Processed
- Update Complete

ACCESS ONLINE FORMS

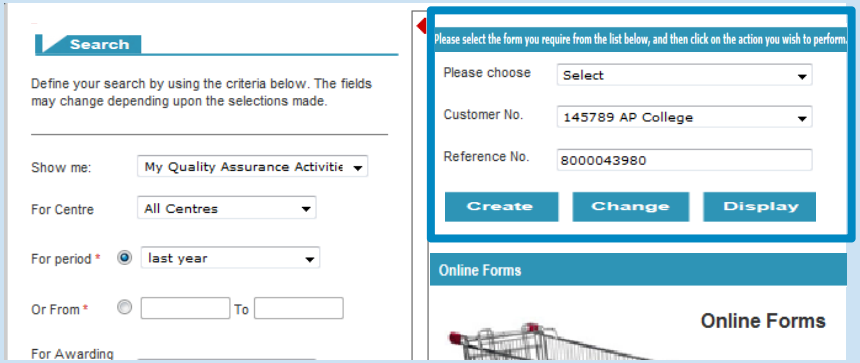
METHOD 1

Click on the reference number for an activity, Approval Visit, CAP / QAP application or submitted Centre Update.

This method is **recommended in most cases.**



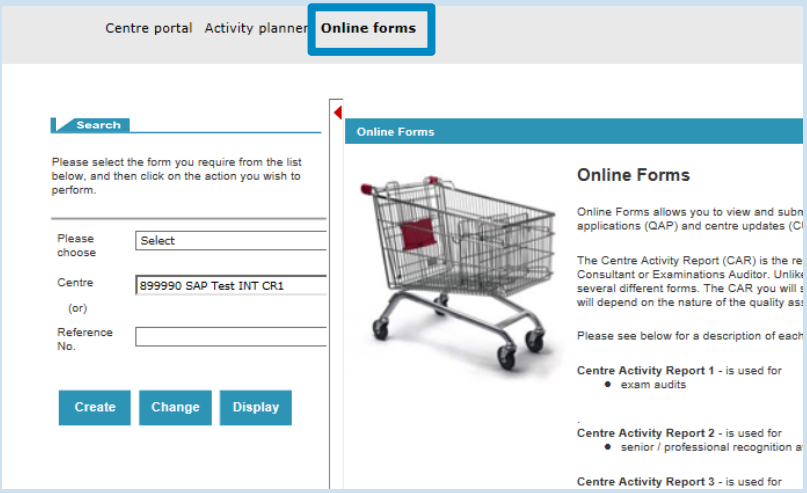
'Online Forms' will appear on the right-hand side of the screen.
The Reference No and form type will be pre-populated.



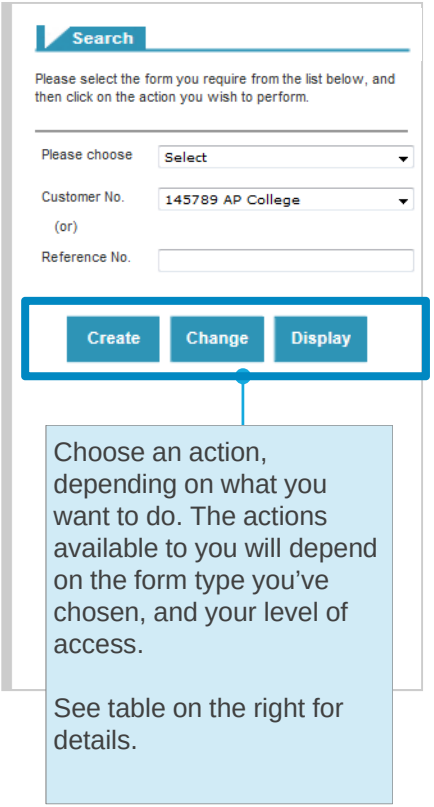
METHOD 2

Click on the Online Forms tab. Use this method for:

- Submitting a CAP / QAP
- Submitting a Centre Update

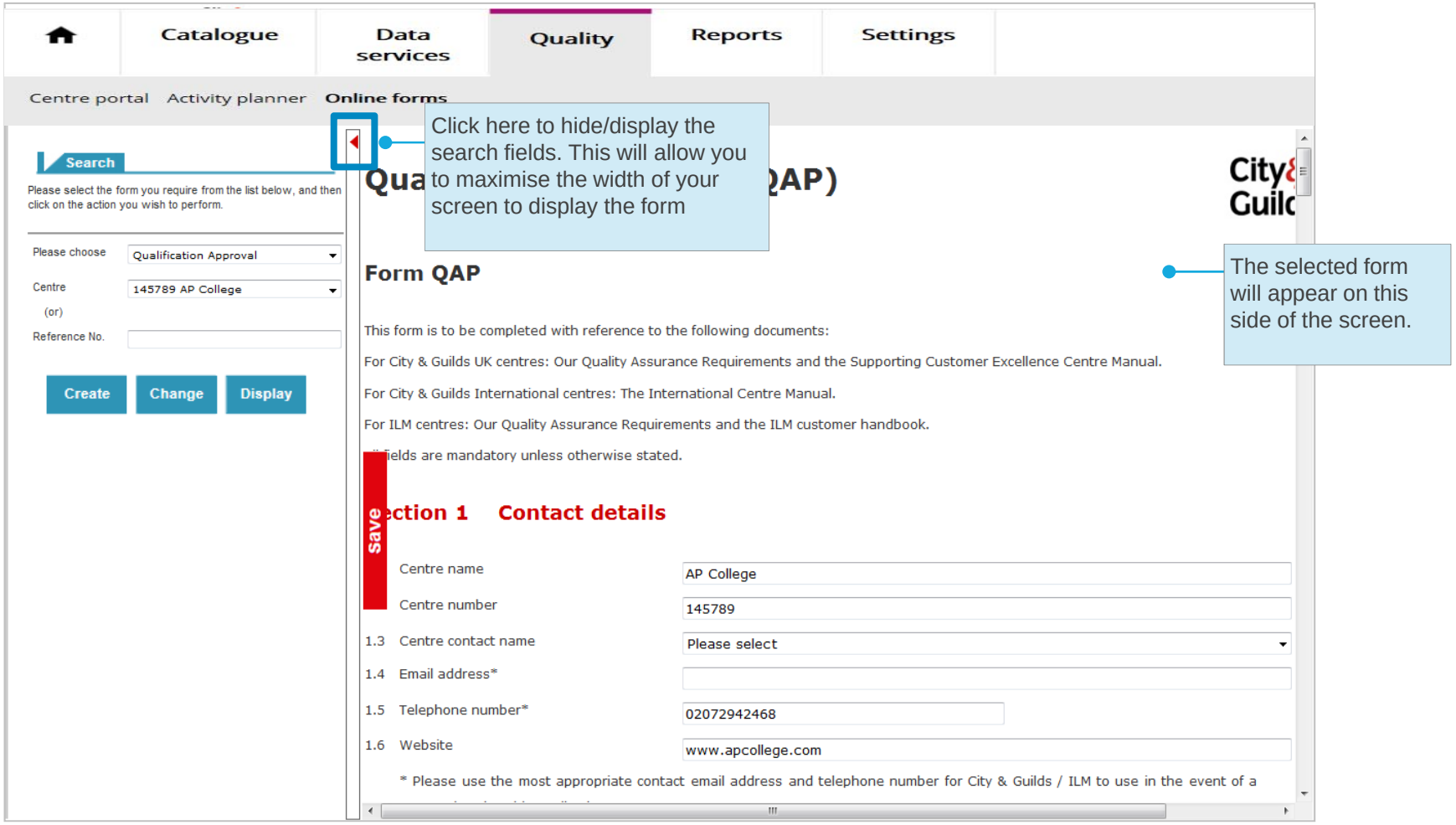


CREATE / CHANGE / DISPLAY

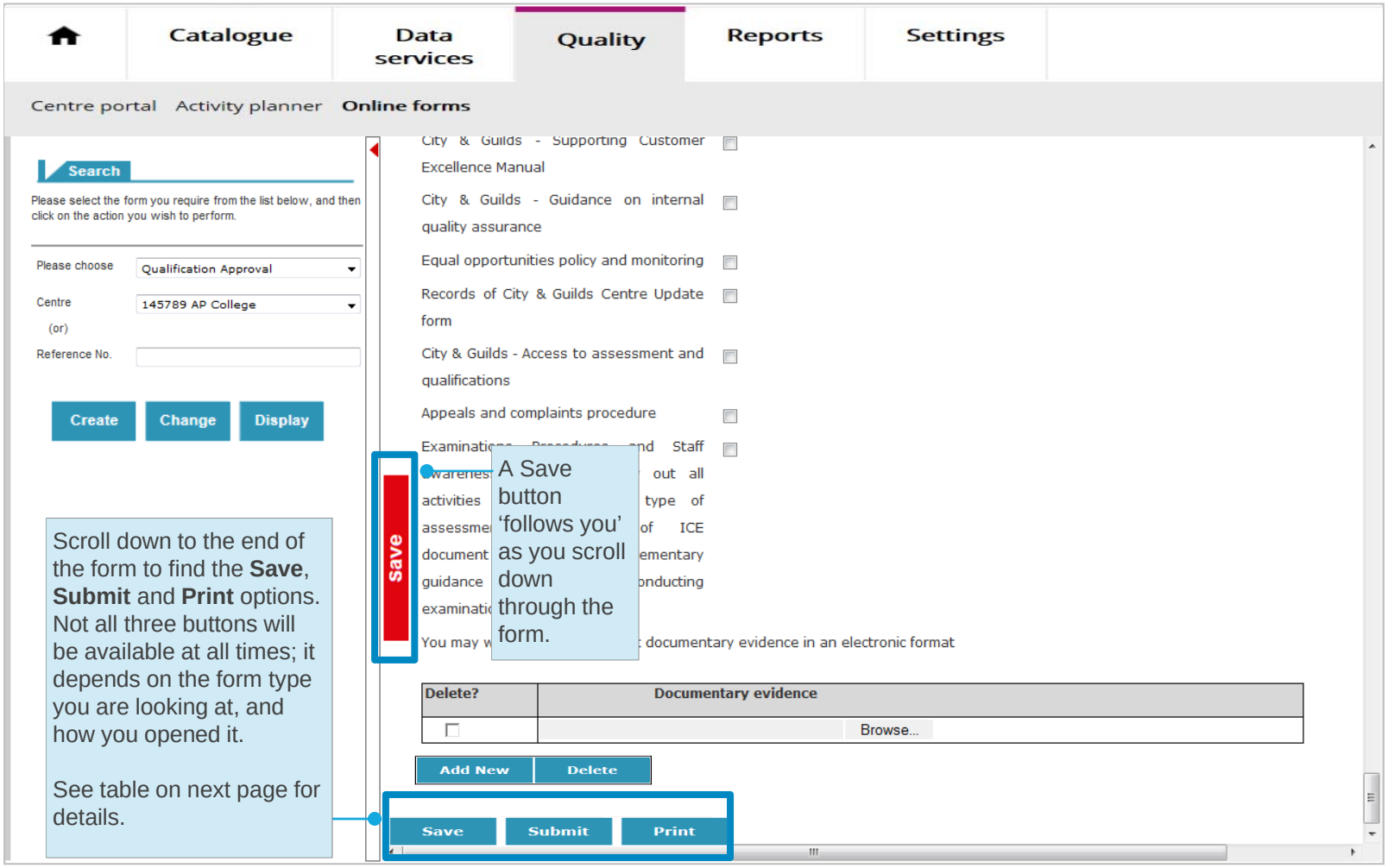


Action	What it does	When you can use it
Create	Opens a new blank form for you to fill in for the first time.	You can create/change the following form types: • A Qualification Approval form (full access users) • A Centre Update form (full access/admin users) • A sampling form CA2 (full access/admin users)
Change	Opens a form you have been working on and that you have saved, but not submitted. Use this button to re-open the form and continue working on it until you are ready to submit.	
Display	Opens a form in read-only mode, so you can view it and print it, but you cannot make any changes or submit it. This is the button you will use to display forms submitted by your EQA.	You can display any submitted form for your centre, including those submitted by an EQA or by another centre user other than yourself.

CREATE / CHANGE / DISPLAY



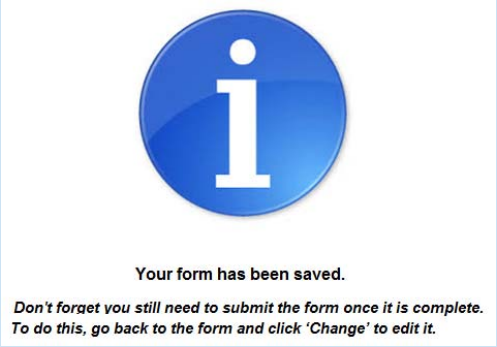
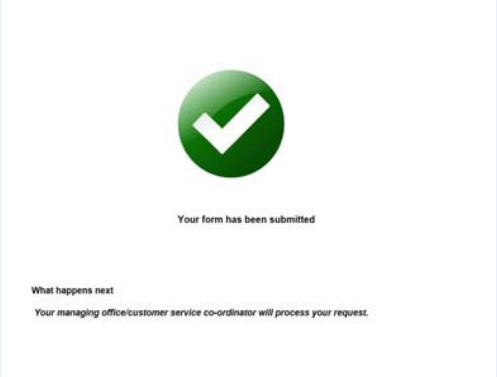
SAVE / SUBMIT / PRINT



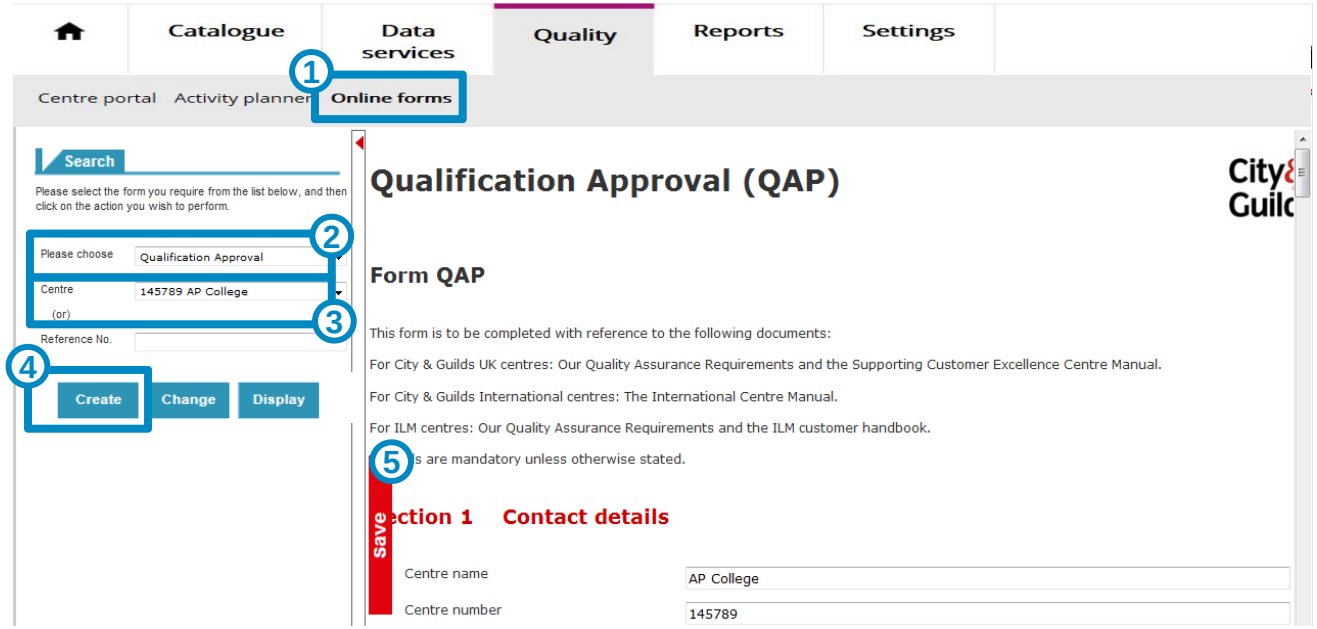
Scroll down to the end of the form to find the **Save**, **Submit** and **Print** options. Not all three buttons will be available at all times; it depends on the form type you are looking at, and how you opened it.

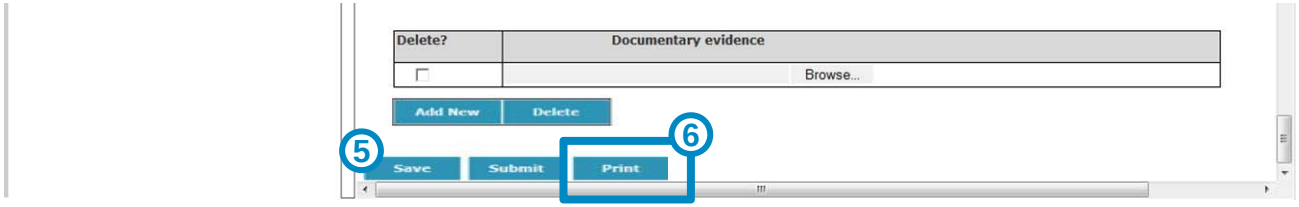
See table on next page for details.

SAVE / SUBMIT / PRINT

Save	Use this button to save the form you've been working on, without submitting it. This allows you to come back to it at a later stage to continue working on it. We **strongly encourage you to save as you go along**, to ensure you don't lose any data. Whenever you save the form, you will see a confirmation message like the one on the right. Re-open the form in 'Change' mode and continue working on it. Please note, the **Save** button will not be available if you open the form in 'Display' mode.	
Submit	Use this button when you are ready to submit the form. **Forms can only be submitted once**. If the form was submitted successfully, you will see a confirmation page like the one on the right, with a brief description of what to do/expect next. **If you do not see the confirmation screen, it means the form has not been submitted**. Scroll through the form to find **errors highlighted in red print**. Make the necessary changes, and try to submit again.	
Print	Use this button to print a copy of the form at any time. **Remember to always set paper orientation as landscape, in order fit the whole form on the page**. You can print to a printer, or you can create an electronic copy (e.g. PDF/Microsoft XPS)	

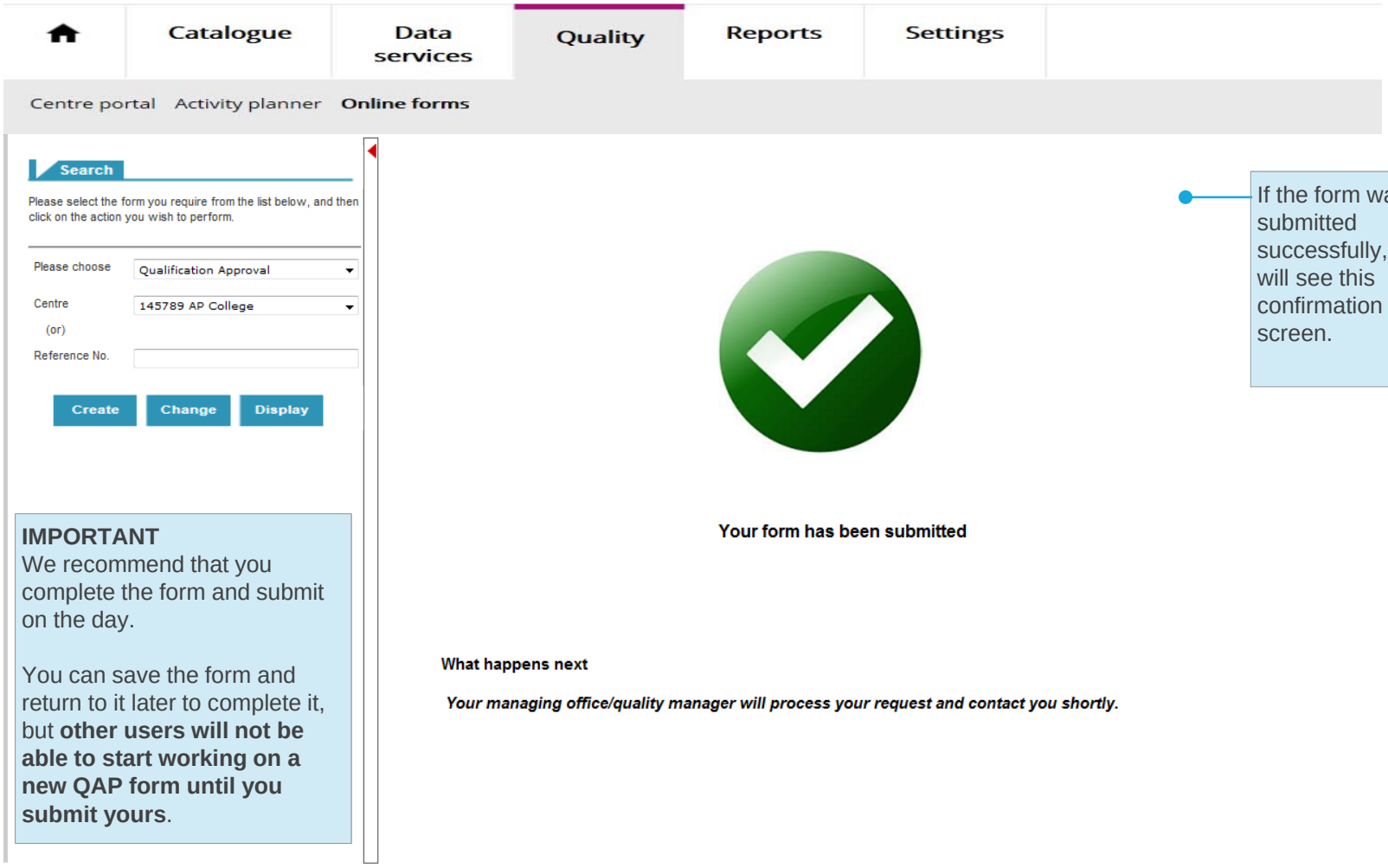
EXAMPLE 1: SUBMITTING A QAP FORM (1/2)





1	Click on the **Online Forms** tab.
2	Choose form type **Qualification Approval**
3	**Centre No** will be pre-populated, or choose from dropdown menu if you have more than one.
4	Click **Create**
5	Complete the form. **Save** as you go along. You will see a confirmation message each time you save.
6	**Submit** when the form is ready.

EXAMPLE 1: SUBMITTING A QAP FORM (2/2)

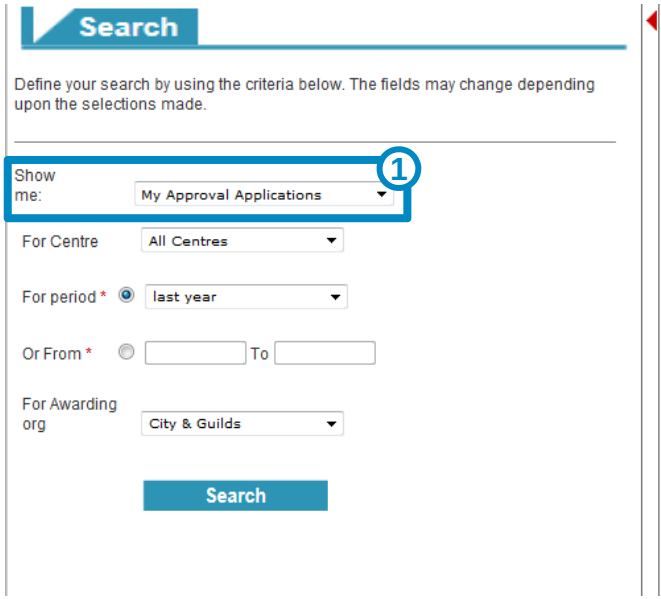


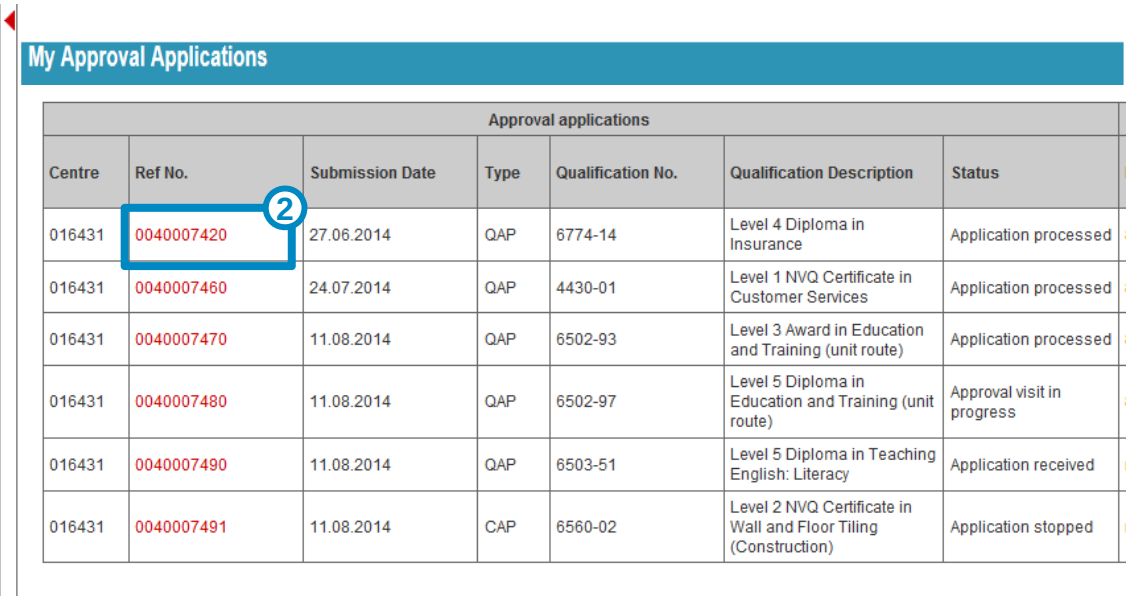
If the form was submitted successfully, you will see this confirmation screen.

IMPORTANT
We recommend that you complete the form and submit on the day.

You can save the form and return to it later to complete it, but **other users will not be able to start working on a new QAP form until you submit yours**.

EXAMPLE 2: VIEWING A SUBMITTED QUALIFICATION APPROVAL (QAP) FORM – (1/3)



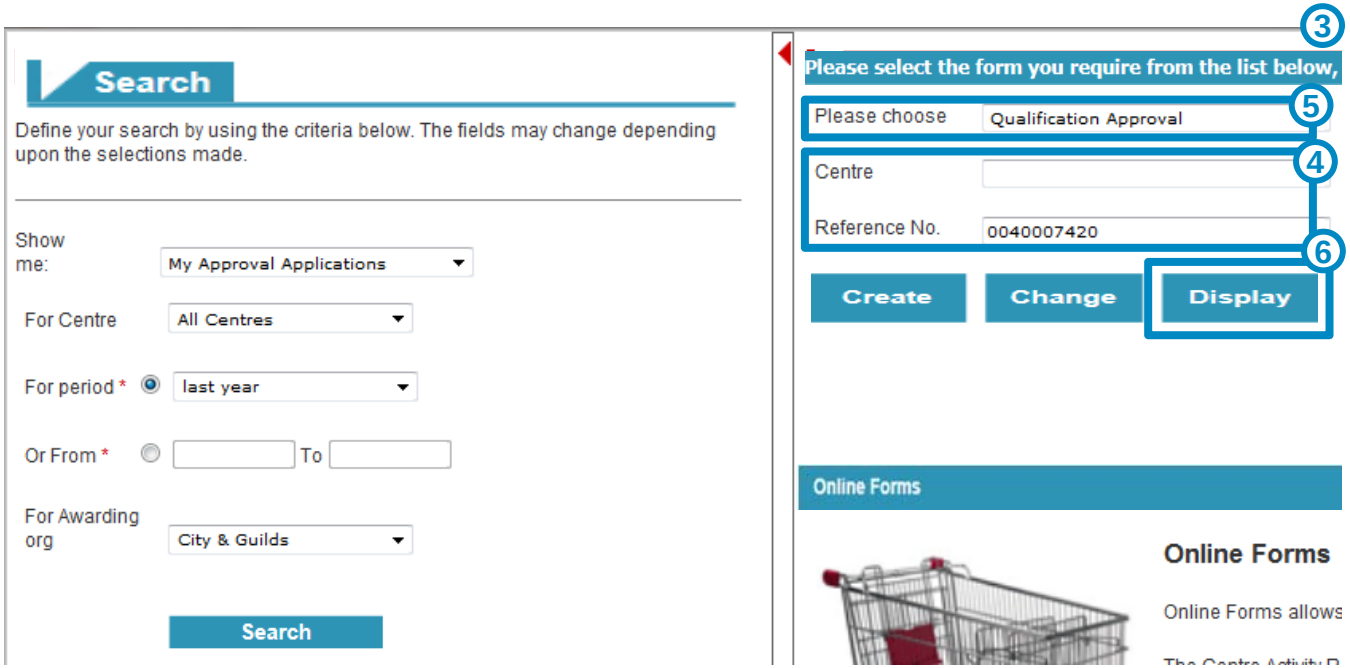


Approval applications

Centre	Ref No.	Submission Date	Type	Qualification No.	Qualification Description	Status
016431	0040007420	27.06.2014	QAP	6774-14	Level 4 Diploma in Insurance	Application processed
016431	0040007460	24.07.2014	QAP	4430-01	Level 1 NVQ Certificate in Customer Services	Application processed
016431	0040007470	11.08.2014	QAP	6502-93	Level 3 Award in Education and Training (unit route)	Application processed
016431	0040007480	11.08.2014	QAP	6502-97	Level 5 Diploma in Education and Training (unit route)	Approval visit in progress
016431	0040007490	11.08.2014	QAP	6503-51	Level 5 Diploma in Teaching English: Literacy	Application received
016431	0040007491	11.08.2014	CAP	6560-02	Level 2 NVQ Certificate in Wall and Floor Tiling (Construction)	Application stopped

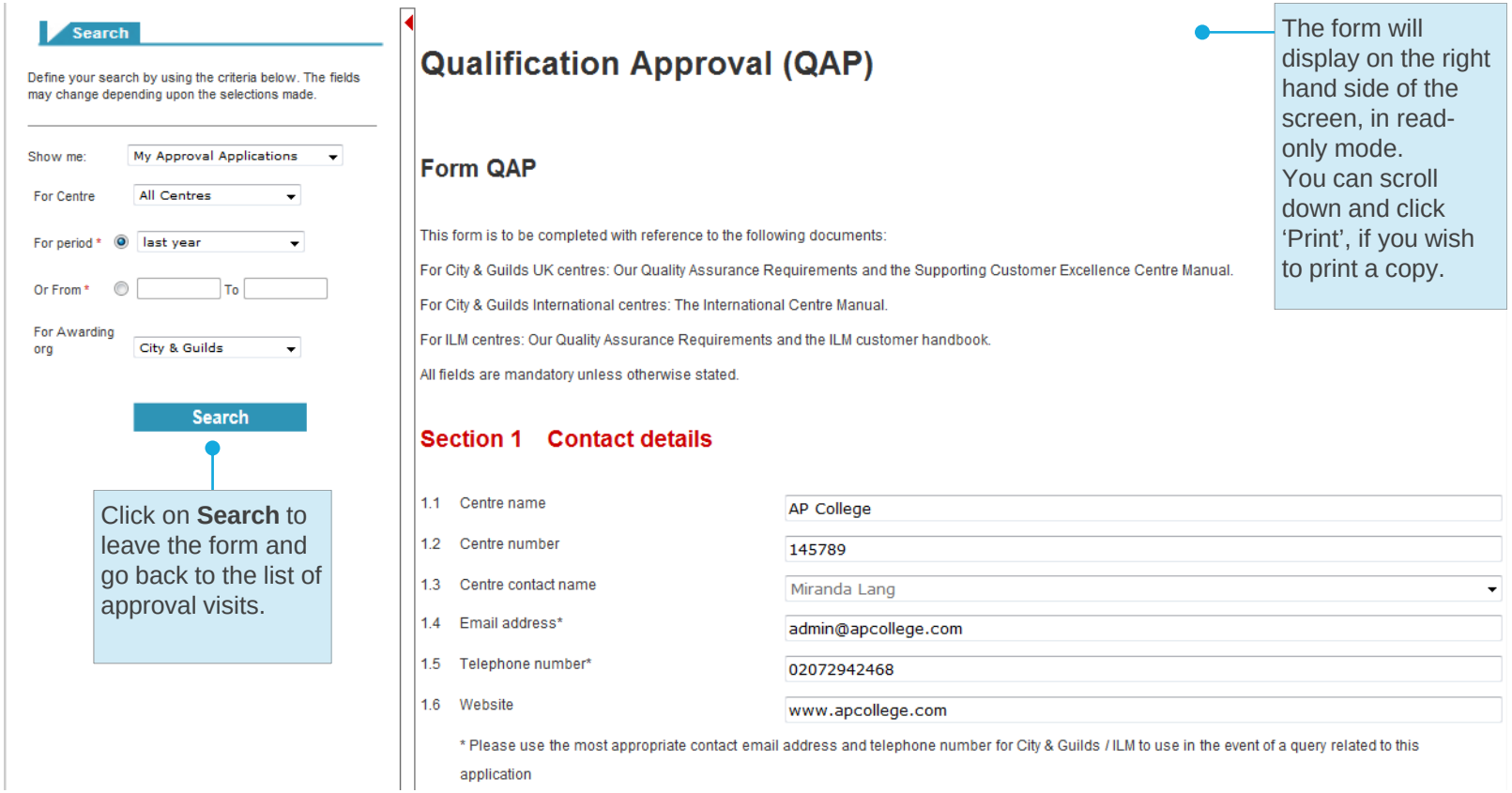
1	Go to **My Approval Applications** and search.
2	Locate the approval application form you wish to display and click on the reference number (400). ***Please note that there will be one line for each qualification included in the application, all with the same reference number (400).***

EXAMPLE 2: VIEWING A SUBMITTED QUALIFICATION APPROVAL (QAP) FORM – (2/3)



3	The Online Forms screen will open on the right-hand side.
4	The reference number for the application and the centre number will be prepopulated.
5	The form type **Qualification Approval** will be pre-selected.
6	Click **Display.**

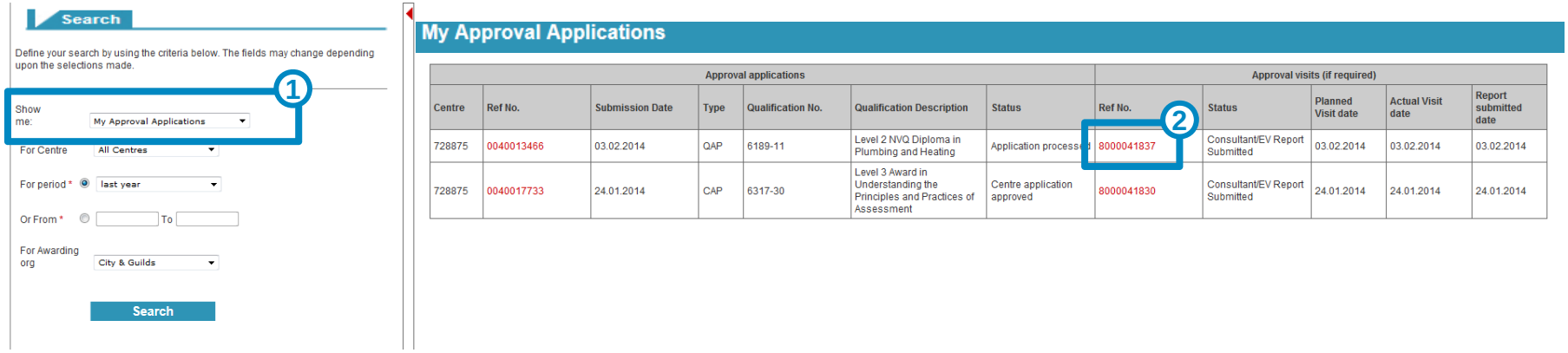
EXAMPLE 2: VIEWING A SUBMITTED QUALIFICATION APPROVAL (QAP) FORM – (3/3)



Click on **Search** to leave the form and go back to the list of approval visits.

The form will display on the right hand side of the screen, in read-only mode.
You can scroll down and click 'Print', if you wish to print a copy.

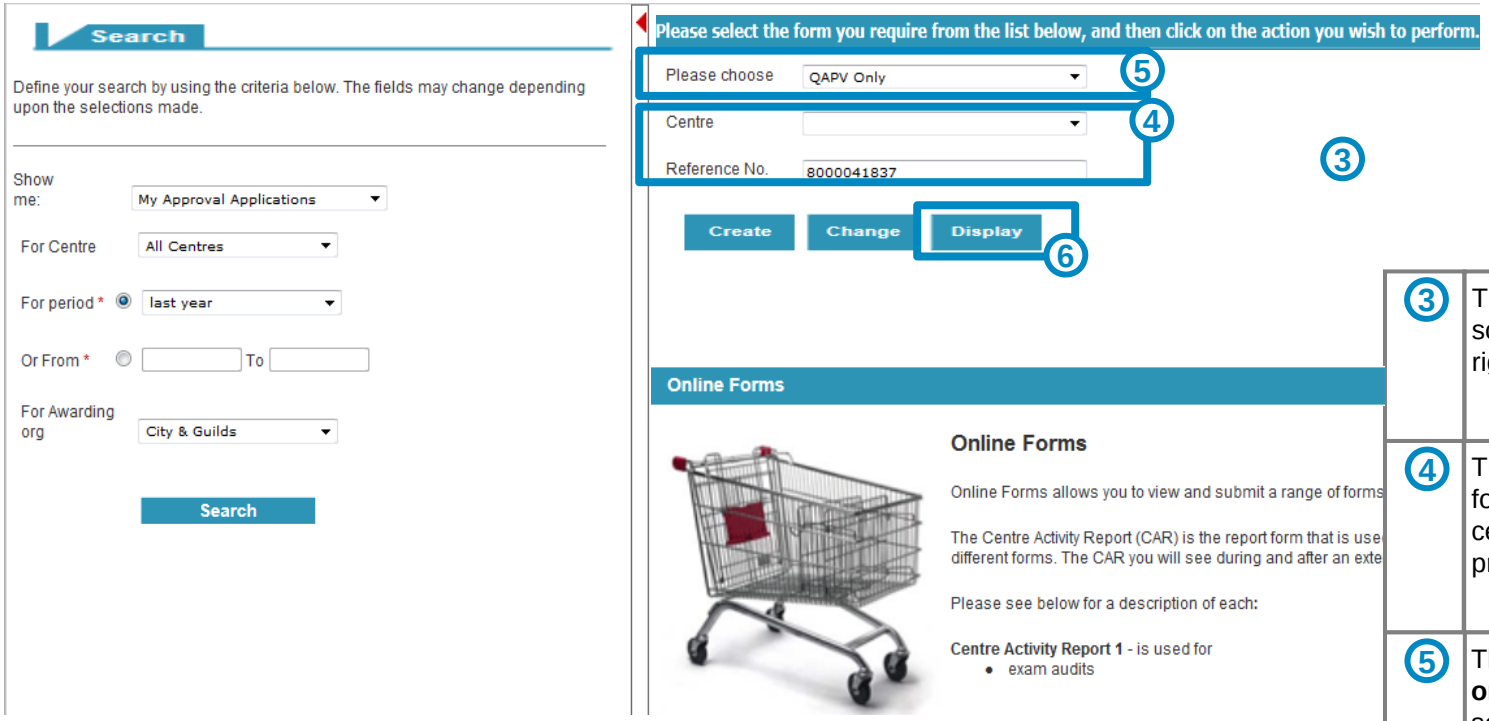
EXAMPLE 3: VIEWING A QUALIFICATION APPROVAL REPORT (QAPv) – (1/3)



Approval applications							Approval visits (if required)				
Centre	Ref No.	Submission Date	Type	Qualification No.	Qualification Description	Status	Ref No.	Status	Planned Visit date	Actual Visit date	Report submitted date
728875	0040013466	03.02.2014	QAP	6189-11	Level 2 NVQ Diploma in Plumbing and Heating	Application processed	8000041837	Consultant/EV Report Submitted	03.02.2014	03.02.2014	03.02.2014
728875	0040017733	24.01.2014	CAP	6317-30	Level 3 Award in Understanding the Principles and Practices of Assessment	Centre application approved	8000041830	Consultant/EV Report Submitted	24.01.2014	24.01.2014	24.01.2014

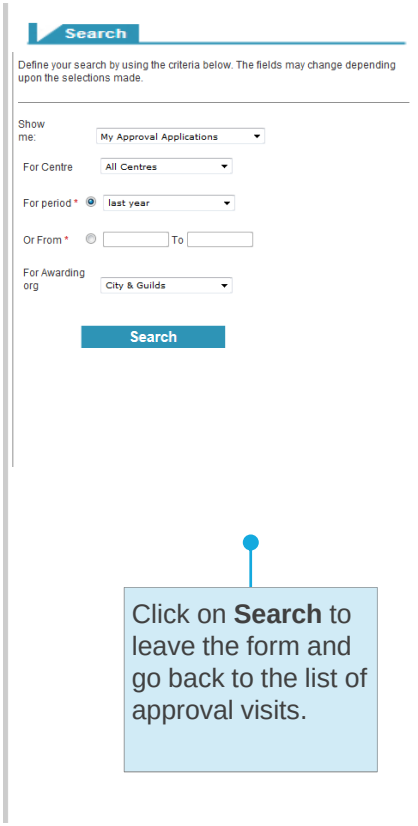
1	Go to **My Approval Applications** and search.
2	Locate the approval visit for which you wish to view the QAPv form and click on the reference number. The visit has to be at status 'Consultant/EV Report Submitted'. ***Please note that there will be one line for each qualification covered by the approval visit, all with the same reference number (800).***

EXAMPLE 3: VIEWING A QUALIFICATION APPROVAL REPORT (QAPv) – (2/3)

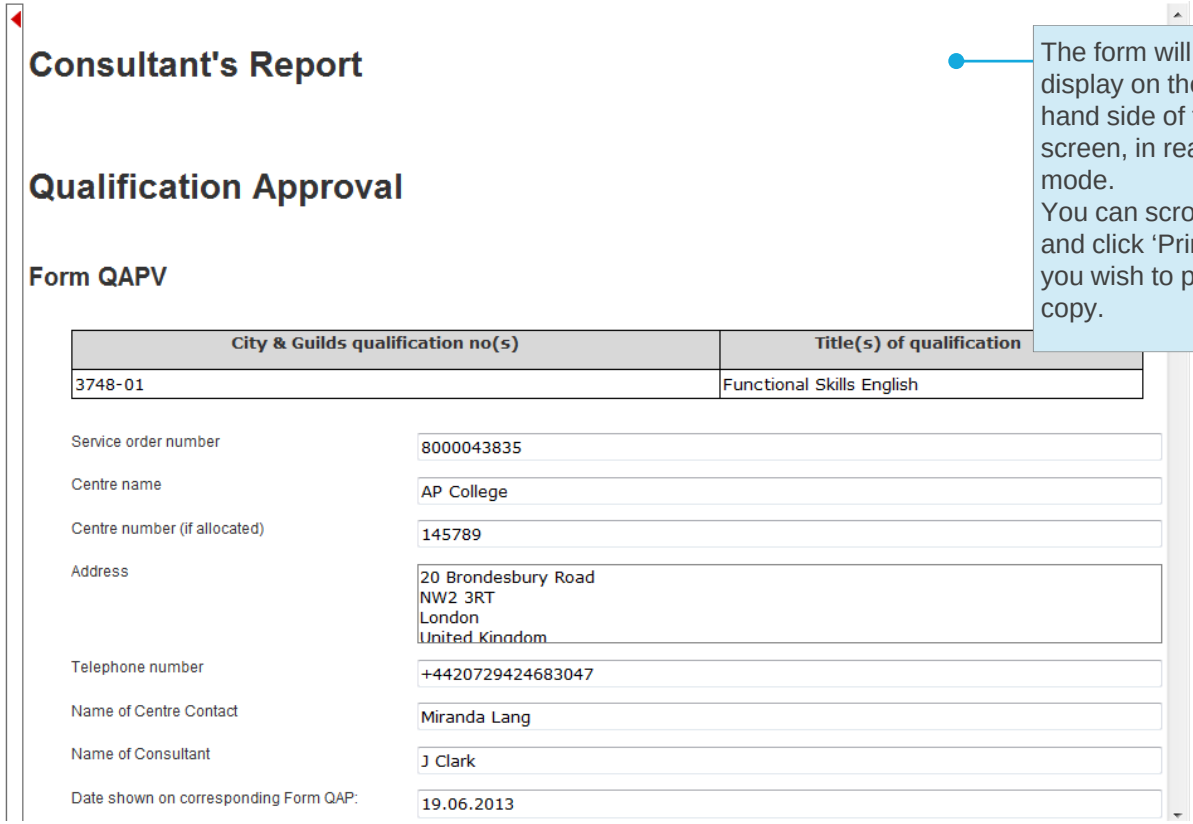


3	The Online Forms screen will open on the right-hand side.
4	The reference number for the visit and the centre number will be prepopulated.
5	The form type **QAPv only** will be pre-selected.
6	Click **Display.**

EXAMPLE 3: VIEWING A QUALIFICATION APPROVAL REPORT (QAPv) – (3/3)



Click on **Search** to leave the form and go back to the list of approval visits.



Consultant's Report

Qualification Approval

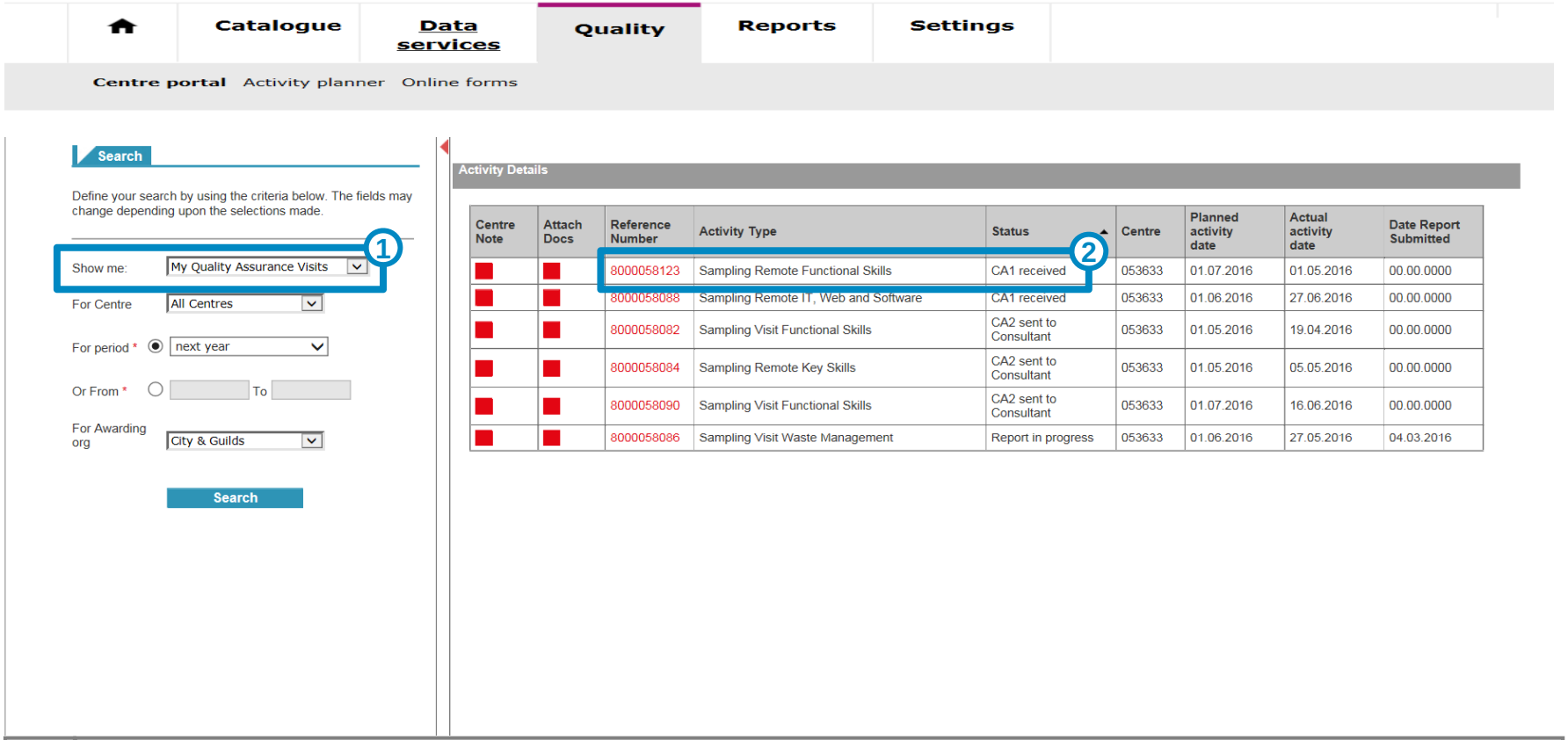
Form QAPV

City & Guilds qualification no(s)	Title(s) of qualification
3748-01	Functional Skills English

Service order number	8000043835
Centre name	AP College
Centre number (if allocated)	145789
Address	20 Brondesbury Road NW2 3RT London United Kingdom
Telephone number	+4420729424683047
Name of Centre Contact	Miranda Lang
Name of Consultant	J Clark
Date shown on corresponding Form QAP:	19.06.2013

The form will display on the right hand side of the screen, in read-only mode.
You can scroll down and click 'Print', if you wish to print a copy.

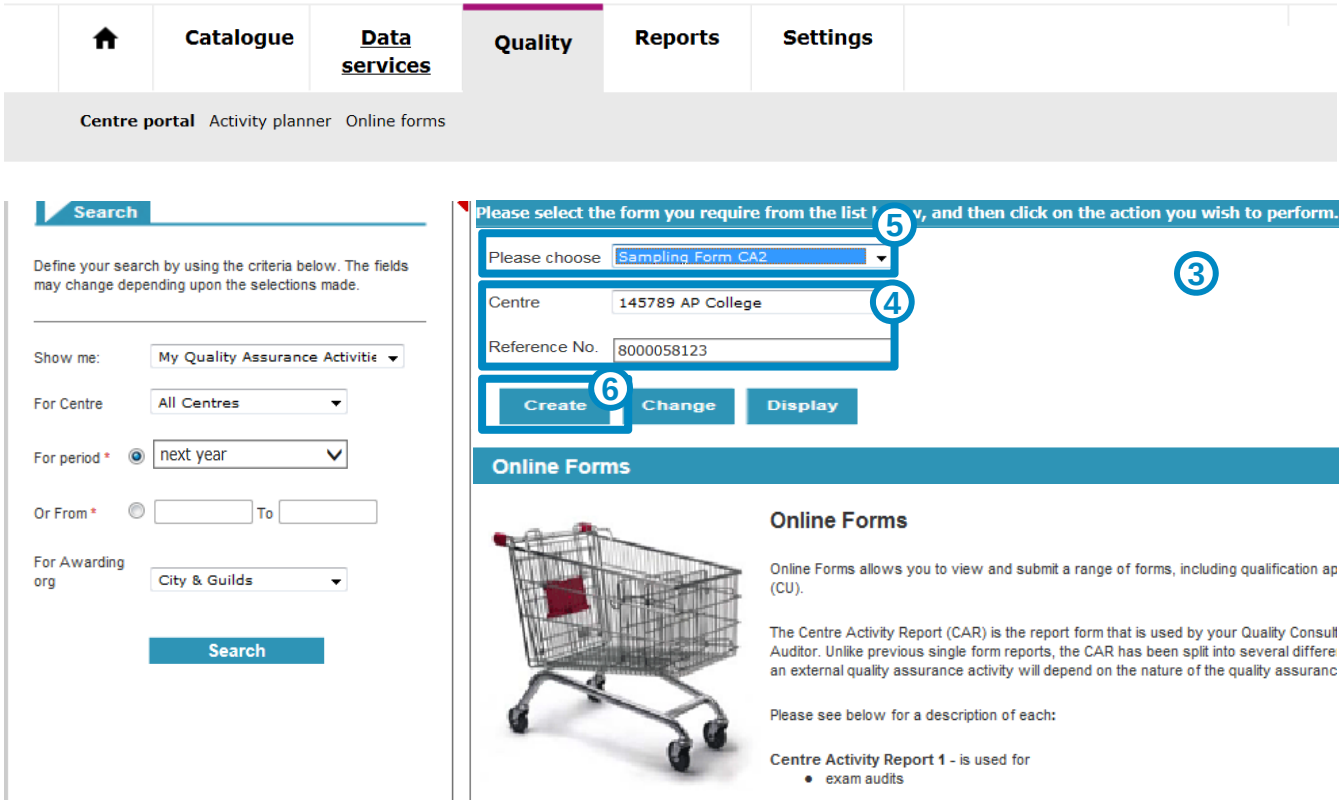
EXAMPLE 4: SUBMITTING A CA2 FORM (1/5)



Centre Note	Attach Docs	Reference Number	Activity Type	Status	Centre	Planned activity date	Actual activity date	Date Report Submitted
		8000058123	Sampling Remote Functional Skills	CA1 received	053633	01.07.2016	01.05.2016	00.00.0000
		8000058088	Sampling Remote IT, Web and Software	CA1 received	053633	01.06.2016	27.06.2016	00.00.0000
		8000058082	Sampling Visit Functional Skills	CA2 sent to Consultant	053633	01.05.2016	19.04.2016	00.00.0000
		8000058084	Sampling Remote Key Skills	CA2 sent to Consultant	053633	01.05.2016	05.05.2016	00.00.0000
		8000058090	Sampling Visit Functional Skills	CA2 sent to Consultant	053633	01.07.2016	16.06.2016	00.00.0000
		8000058086	Sampling Visit Waste Management	Report in progress	053633	01.06.2016	27.05.2016	04.03.2016

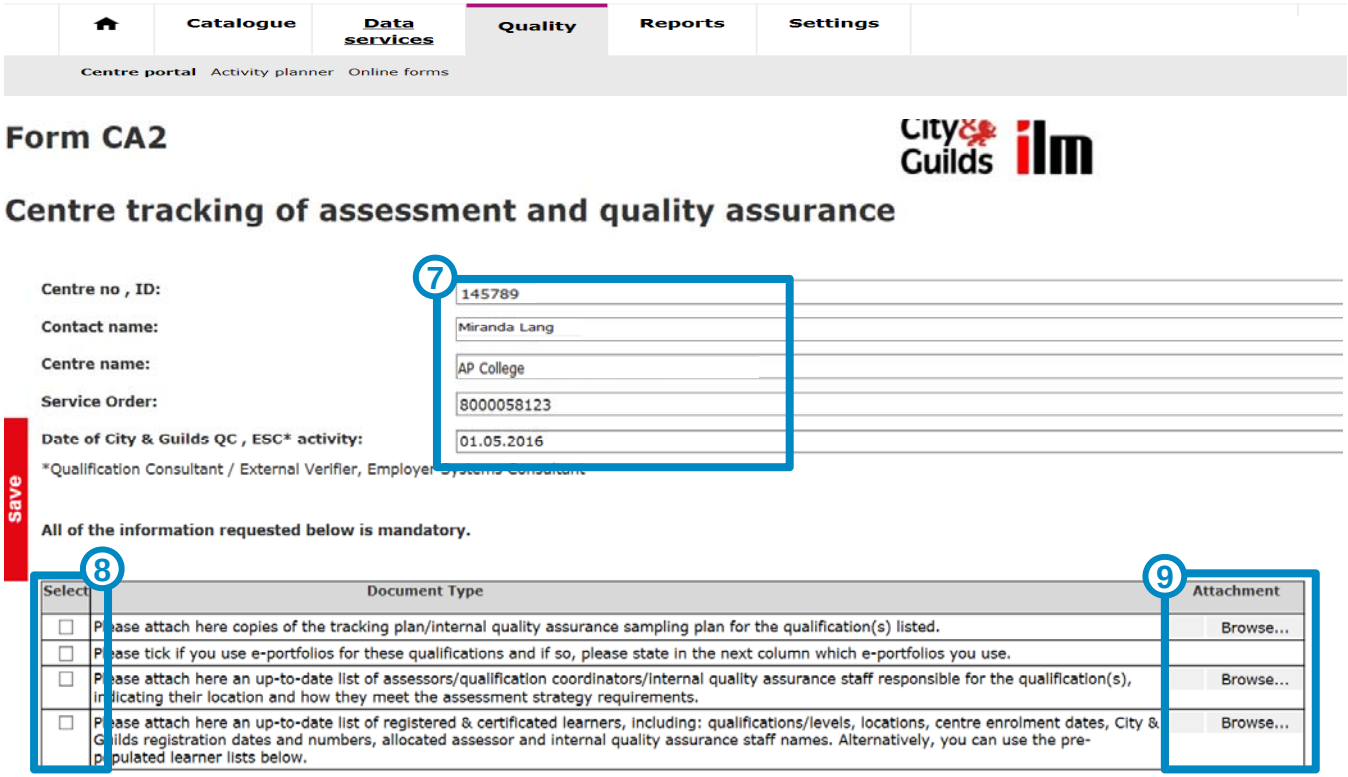
1	Go to **My Quality Assurance Activities** and search.
2	Locate the activity for which you wish to submit a CA2 form and click on the reference number. **The activity has to be at 'CA1 received' status.**

EXAMPLE 4: SUBMITTING A CA2 FORM (2/5)



3	The Online Forms screen will open on the right-hand side.
4	The reference number for the activity and the centre number will be prepopulated.
5	Select the form type '**Sampling Form CA2**'
6	Click **Create.**

EXAMPLE 4: SUBMITTING A CA2 FORM (3/5)



7	This information will prepopulate.
8	Tick as appropriate.
9	Attach required documents (one per field). For the last item (list of registered/certificated learners), you have the option of including an attachment here or using the tables provided further down (see next page) to download pre-populated learner lists. Either way, you must tick the box to indicate you are supplying the information.

EXAMPLE 4: SUBMITTING A CA2 FORM (4/5)

If you prefer not to upload your own list of registered and certificated learners, you can download pre-populated lists below. This is what you need to do:

1. Click on the 'Download' button to generate the list in Excel format. This will show all the learners registered and certificated in the last 24 months for each qualification.
2. Save it on a local drive.
3. Complete all columns for all relevant learners. Please include any other active learners that may not be listed here.
4. Upload the list using the 'Upload learners' button for each qualification.

Save

10

Qualification no	Qualification title	Download Learners	Upload learners
3748-01	Functional Skills English	Download	Browse...
3748-02	Functional Skills Mathematics	Download	Browse...
3748-03	Functional Skills Information and Communication Technology (ICT)	Download	Browse...

Please use the table below to include any additional documents you wish to attach.

11

Delete?	Additional Attachments
☐	Browse...

Add New | Delete

Additional Comments

12

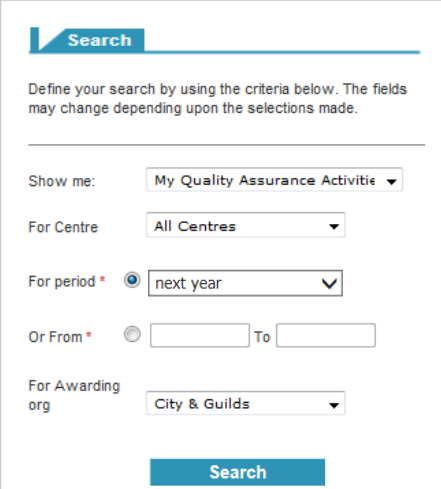
Please enter any additional comments here

13

Save | Submit | Print

10	You **only need to use these tables if you have not attached your own list** of registered/certificated learners as explained in the previous page. If you have, please ignore this section.
11	Add any other attachments you may wish to include.
12	Add any other comments you may wish to include.
13	Save as you go along and submit when the form is ready.

EXAMPLE 4: SUBMITTING A CA2 FORM (5/5)



Click on **Search** to leave the form and go back to the list of activities.

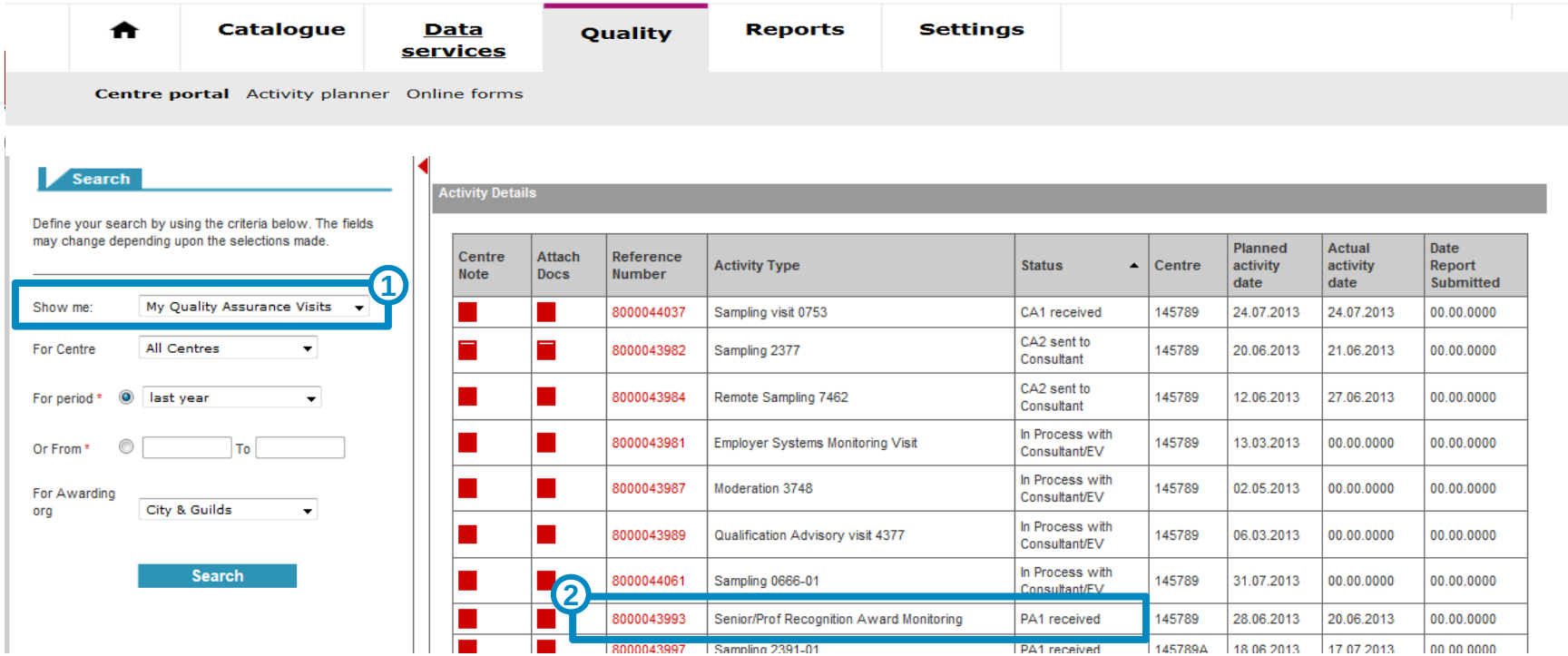
Your form has been submitted

If the form was submitted successfully, you will see this confirmation screen.

What happens next

Your Consultant/EV will now prepare a Plan of Activity form (PA1).

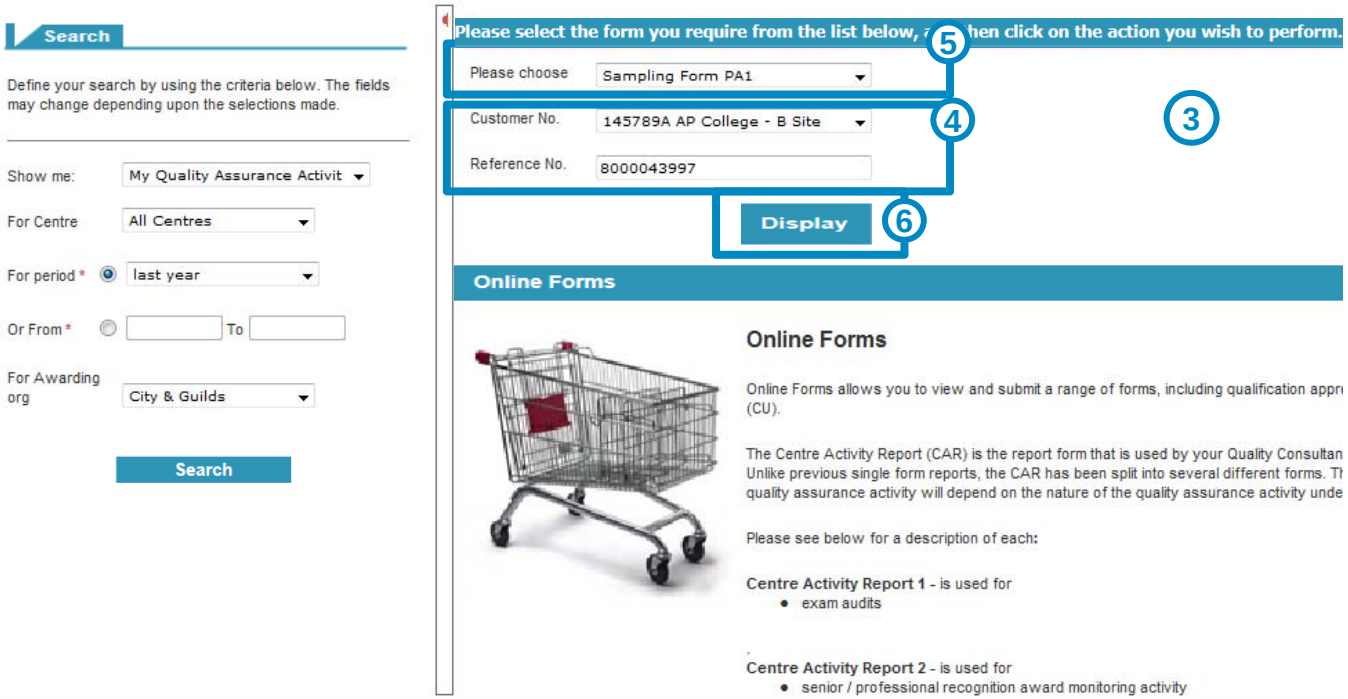
EXAMPLE 5: VIEWING A PLAN OF ACTIVITY FORM (PA1) – (1/3)



Centre Note	Attach Docs	Reference Number	Activity Type	Status	Centre	Planned activity date	Actual activity date	Date Report Submitted
		8000044037	Sampling visit 0753	CA1 received	145789	24.07.2013	24.07.2013	00.00.0000
		8000043982	Sampling 2377	CA2 sent to Consultant	145789	20.06.2013	21.06.2013	00.00.0000
		8000043984	Remote Sampling 7462	CA2 sent to Consultant	145789	12.06.2013	27.06.2013	00.00.0000
		8000043981	Employer Systems Monitoring Visit	In Process with Consultant/EV	145789	13.03.2013	00.00.0000	00.00.0000
		8000043987	Moderation 3748	In Process with Consultant/EV	145789	02.05.2013	00.00.0000	00.00.0000
		8000043989	Qualification Advisory visit 4377	In Process with Consultant/EV	145789	06.03.2013	00.00.0000	00.00.0000
		8000044061	Sampling 0666-01	In Process with Consultant/EV	145789	31.07.2013	00.00.0000	00.00.0000
		8000043993	Senior/Prof Recognition Award Monitoring	PA1 received	145789	28.06.2013	20.06.2013	00.00.0000
		8000043997	Sampling 2391-01	PA1 received	145789A	18.06.2013	17.07.2013	00.00.0000

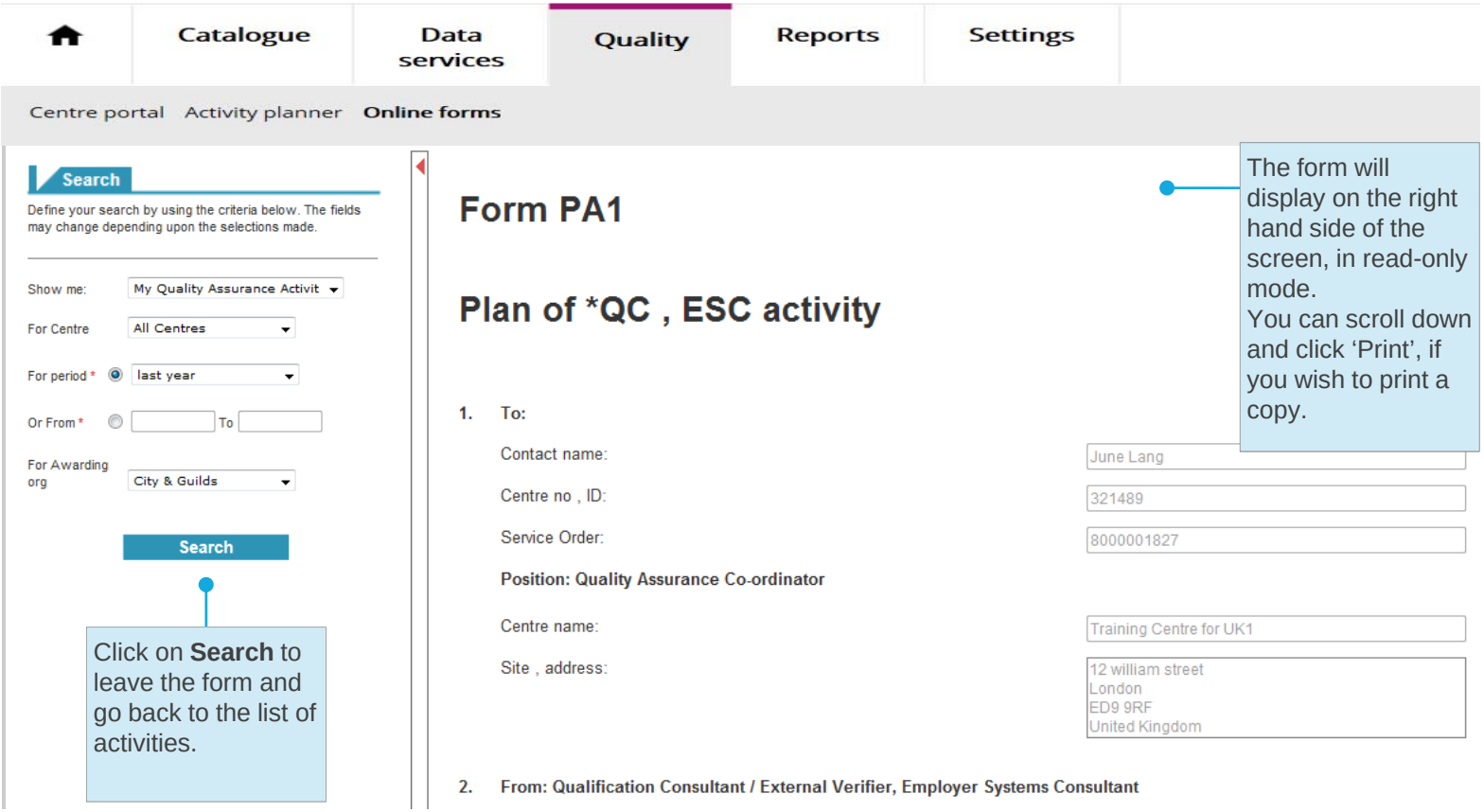
1	Go to **My Quality Assurance Activities** and search.
2	Locate the activity for which you wish to view the PA1 form and click on the reference number. **The activity has to be at 'PA1 received' status.**

EXAMPLE 5: VIEWING A PLAN OF ACTIVITY FORM (PA1) – (2/3)



3	The Online Forms screen will open on the right-hand side.
4	The reference number for the activity and the centre number will be prepopulated.
5	Select form type **Sampling Form PA1**.
6	Click **Display.**

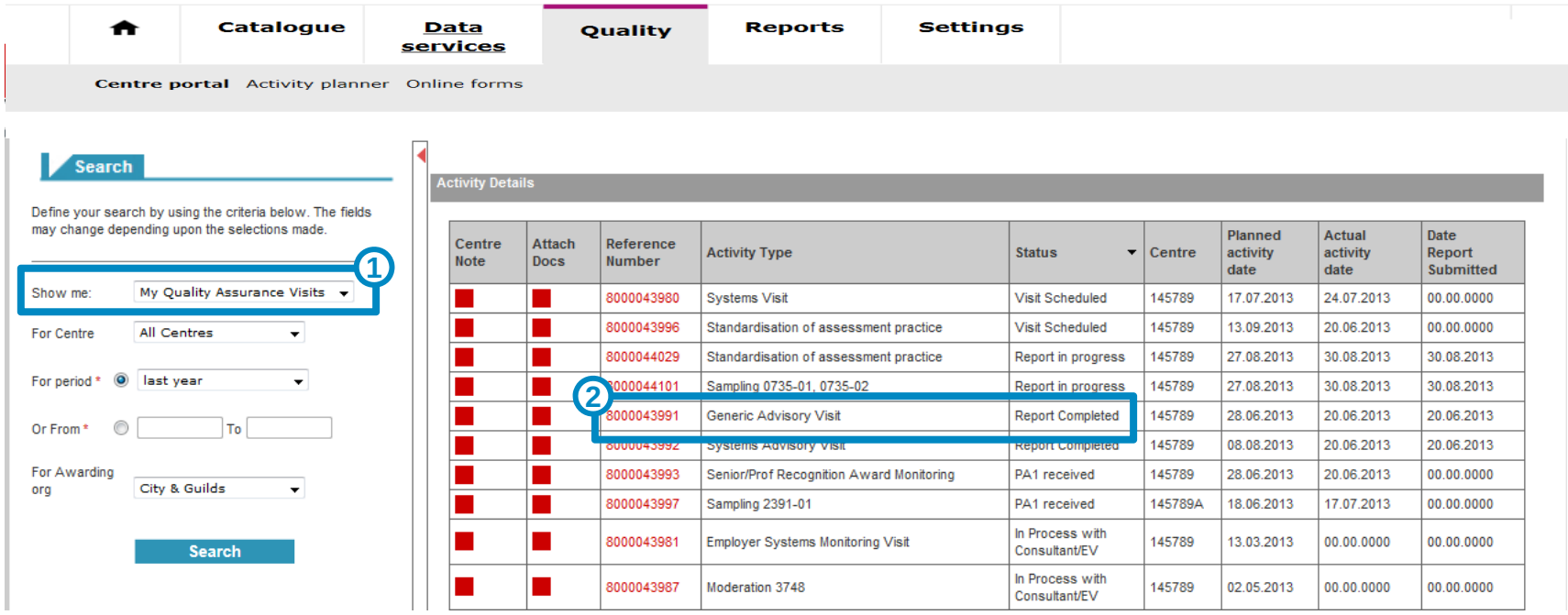
EXAMPLE 5: VIEWING A PLAN OF ACTIVITY FORM (PA1) – (3/3)



The form will display on the right hand side of the screen, in read-only mode.
You can scroll down and click 'Print', if you wish to print a copy.

Click on **Search** to leave the form and go back to the list of activities.

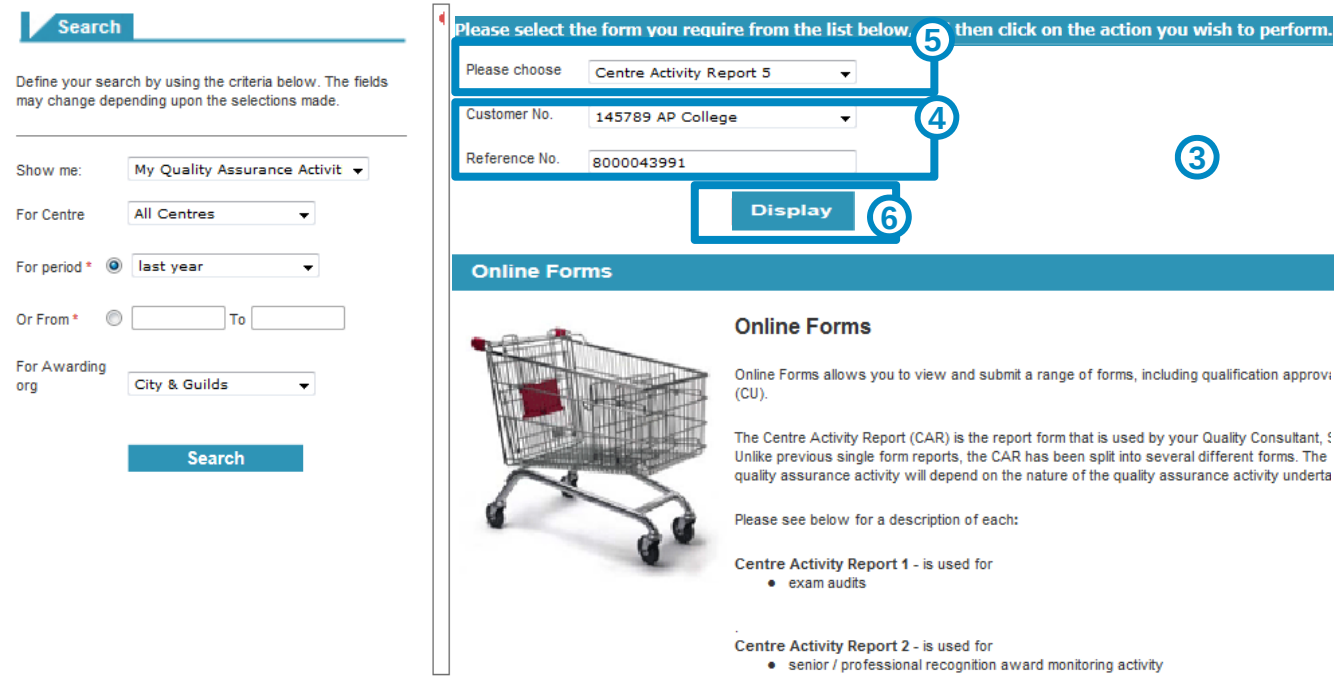
EXAMPLE 6: VIEWING A CENTRE ACTIVITY REPORT (CAR) – (1/3)



Centre Note	Attach Docs	Reference Number	Activity Type	Status	Centre	Planned activity date	Actual activity date	Date Report Submitted
		8000043980	Systems Visit	Visit Scheduled	145789	17.07.2013	24.07.2013	00.00.0000
		8000043996	Standardisation of assessment practice	Visit Scheduled	145789	13.09.2013	20.06.2013	00.00.0000
		8000044029	Standardisation of assessment practice	Report in progress	145789	27.08.2013	30.08.2013	30.08.2013
		8000044101	Sampling 0735-01, 0735-02	Report in progress	145789	27.08.2013	30.08.2013	30.08.2013
		8000043991	Generic Advisory Visit	Report Completed	145789	28.06.2013	20.06.2013	20.06.2013
		8000043992	Systems Advisory Visit	Report Completed	145789	08.08.2013	20.06.2013	20.06.2013
		8000043993	Senior/Prof Recognition Award Monitoring	PA1 received	145789	28.06.2013	20.06.2013	00.00.0000
		8000043997	Sampling 2391-01	PA1 received	145789A	18.06.2013	17.07.2013	00.00.0000
		8000043981	Employer Systems Monitoring Visit	In Process with Consultant/EV	145789	13.03.2013	00.00.0000	00.00.0000
		8000043987	Moderation 3748	In Process with Consultant/EV	145789	02.05.2013	00.00.0000	00.00.0000

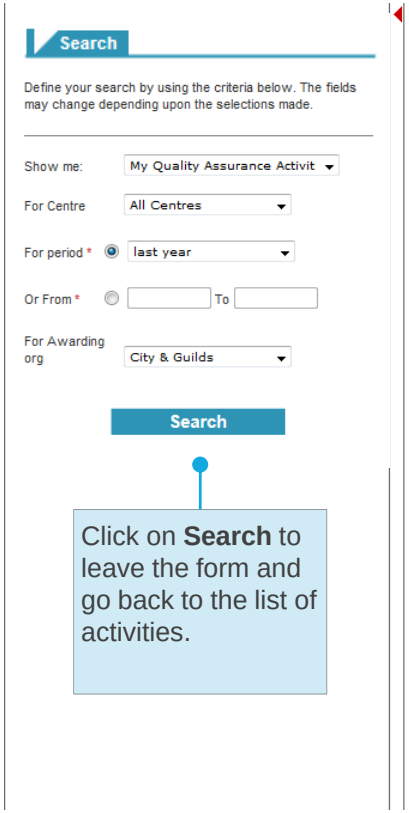
1	Go to **My Quality Assurance Activities** and search.
2	Locate the activity for which you wish to view the CAR form and click on the reference number. **The activity has to be at 'Report Completed' status.**

EXAMPLE 6: VIEWING A CENTRE ACTIVITY REPORT (CAR) – (2/3)



3	The Online Forms screen will appear on the right-hand side.
4	The reference number for the activity and the centre number will be prepopulated.
5	The form type will be pre-selected according to the activity.
6	Click **Display.**

EXAMPLE 6: VIEWING A CENTRE ACTIVITY REPORT (CAR) – (3/3)



Click on **Search** to leave the form and go back to the list of activities.

Centre Activity Report

Systems Visit

Systems Advisory

Section 1 Contact details

1.1 Service Order	8000043992

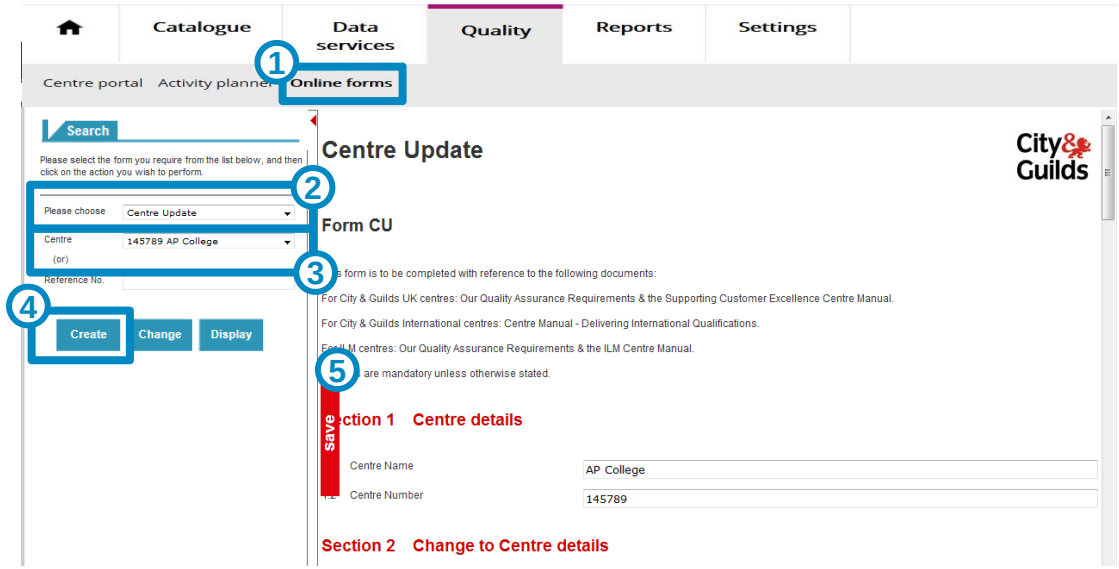
1.2 Centre Name	AP College
1.3 Centre number	145789

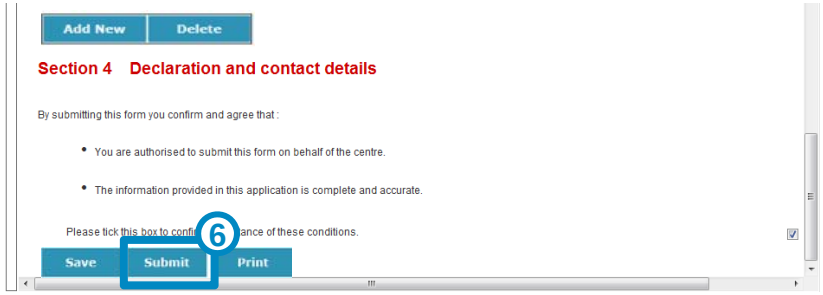
1.4 Centre contact	
- Title	
- First name	Melanie
- Surname	Jones
- Telephone number*	+443047
- Email address*	analia.padin@cityandguilds.com

Consultant Name	J Clark
Type of Activity	Systems Advisory
Date of Activity (dd.mm.yyyy)	20.06.2013

The form will display on the right hand side of the screen, in read-only mode.
You can scroll down and click 'Print', if you wish to print a copy (landscape recommended).

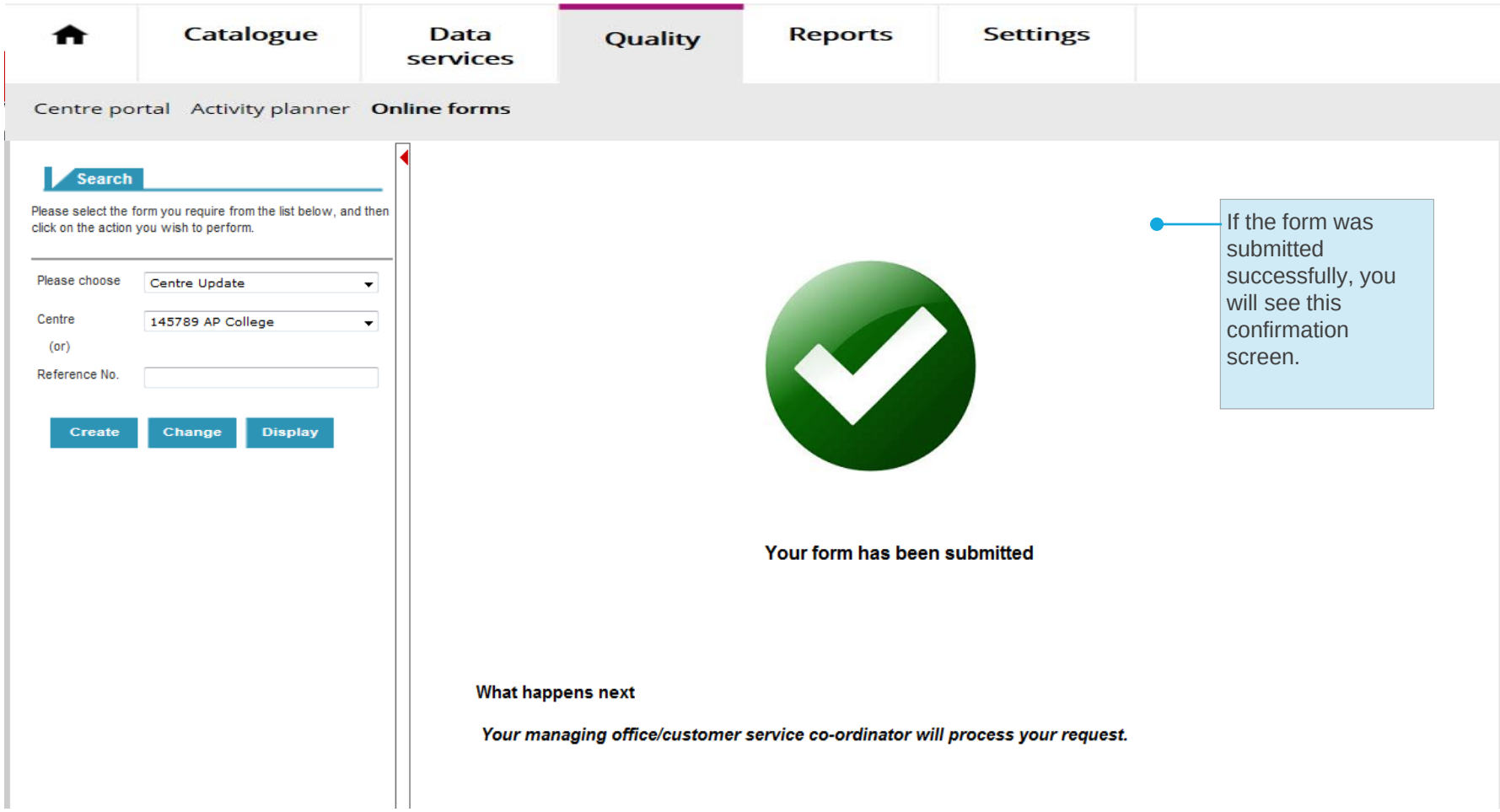
EXAMPLE 7: SUBMITTING A CENTRE UPDATE FORM (1/2)





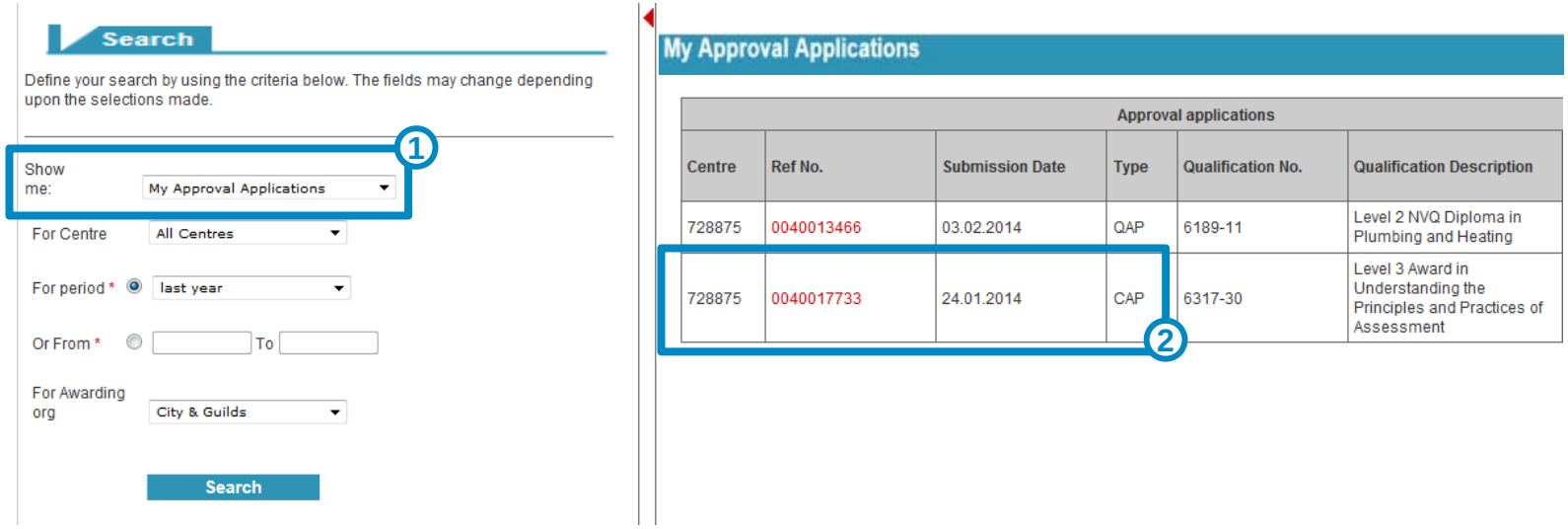
1	Click on the **Online Forms** tab.
2	Choose form type **Centre Update**
3	**Centre No** will be pre-populated, or choose from dropdown menu if you have more than one.
4	Click **Create**
5	Complete the form. Save as you go along. You will see a confirmation message each time you save.
6	Submit when the form is ready.

EXAMPLE 7: SUBMITTING A CENTRE UPDATE FORM (2/2)



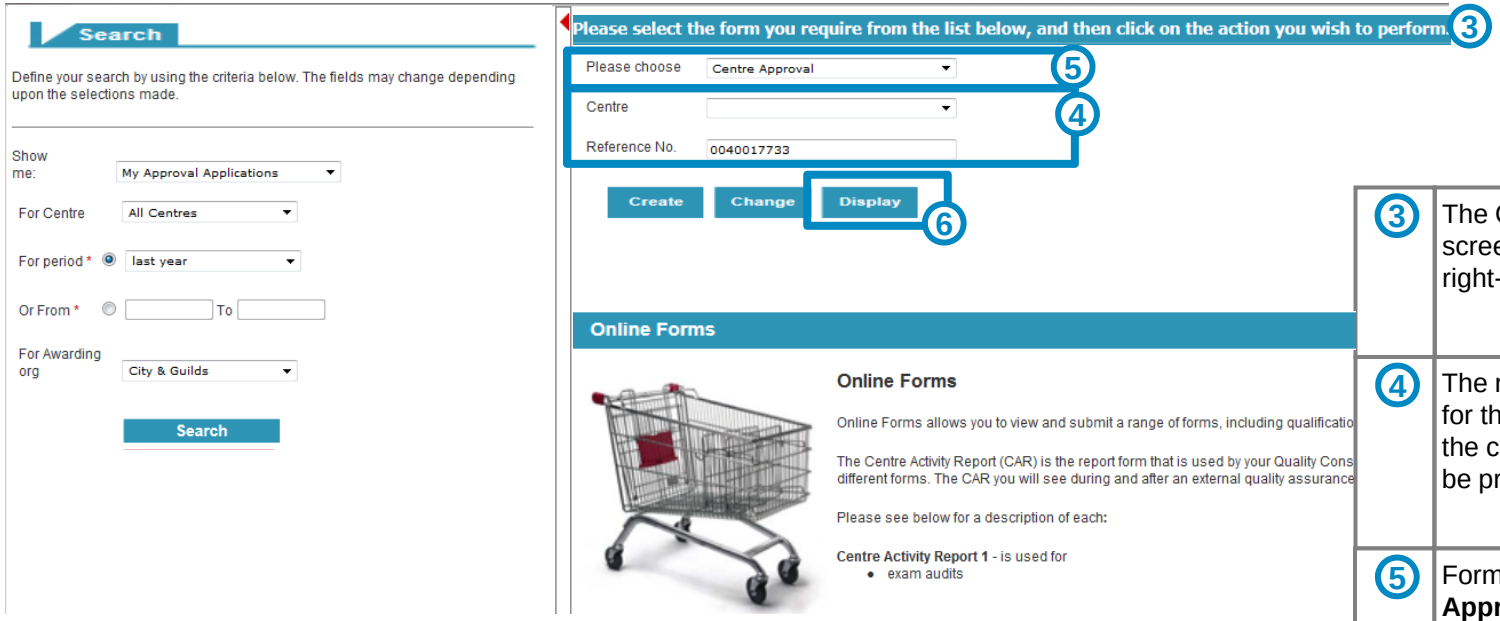
If the form was submitted successfully, you will see this confirmation screen.

EXAMPLE 8: VIEWING YOUR SUBMITTED CENTRE APPROVAL (CAP) FORM – (1/3) (ONLY IF YOU SUBMITTED IT ONLINE)



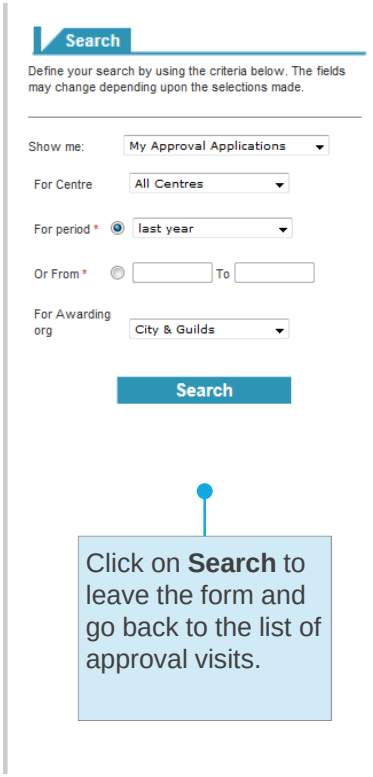
1	Go to **My Approval Applications** and search.
2	Locate the centre approval application (CAP) on the list and click on the reference number (400). ***Please note that there will be one line for each qualification included in the application, all with the same reference number (400).***

EXAMPLE 8: VIEWING YOUR SUBMITTED CENTRE APPROVAL (CAP) FORM – (2/3) (ONLY IF YOU SUBMITTED IT ONLINE)

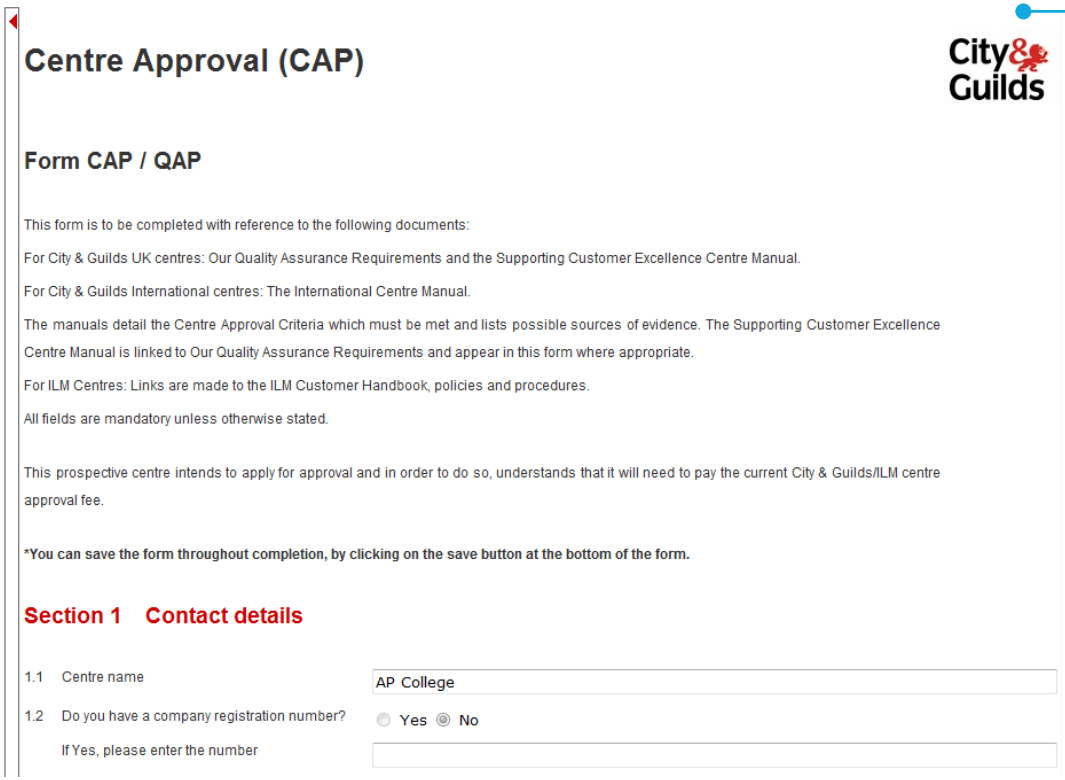


3	The Online Forms screen will open on the right-hand side.
4	The reference number for the application and the centre number will be prepopulated.
5	Form type **Centre Approval** will be pre-selected.
6	Click **Display.**

EXAMPLE 8: VIEWING YOUR SUBMITTED CENTRE APPROVAL (CAP) FORM – (3/3) (ONLY IF YOU SUBMITTED IT ONLINE)



Click on **Search** to leave the form and go back to the list of approval visits.



The form will display on the right hand side of the screen, in read-only mode.
You can scroll down and click 'Print', if you wish to print a copy.

QUALITY PORTAL

9. ACTIVITY PLANNER

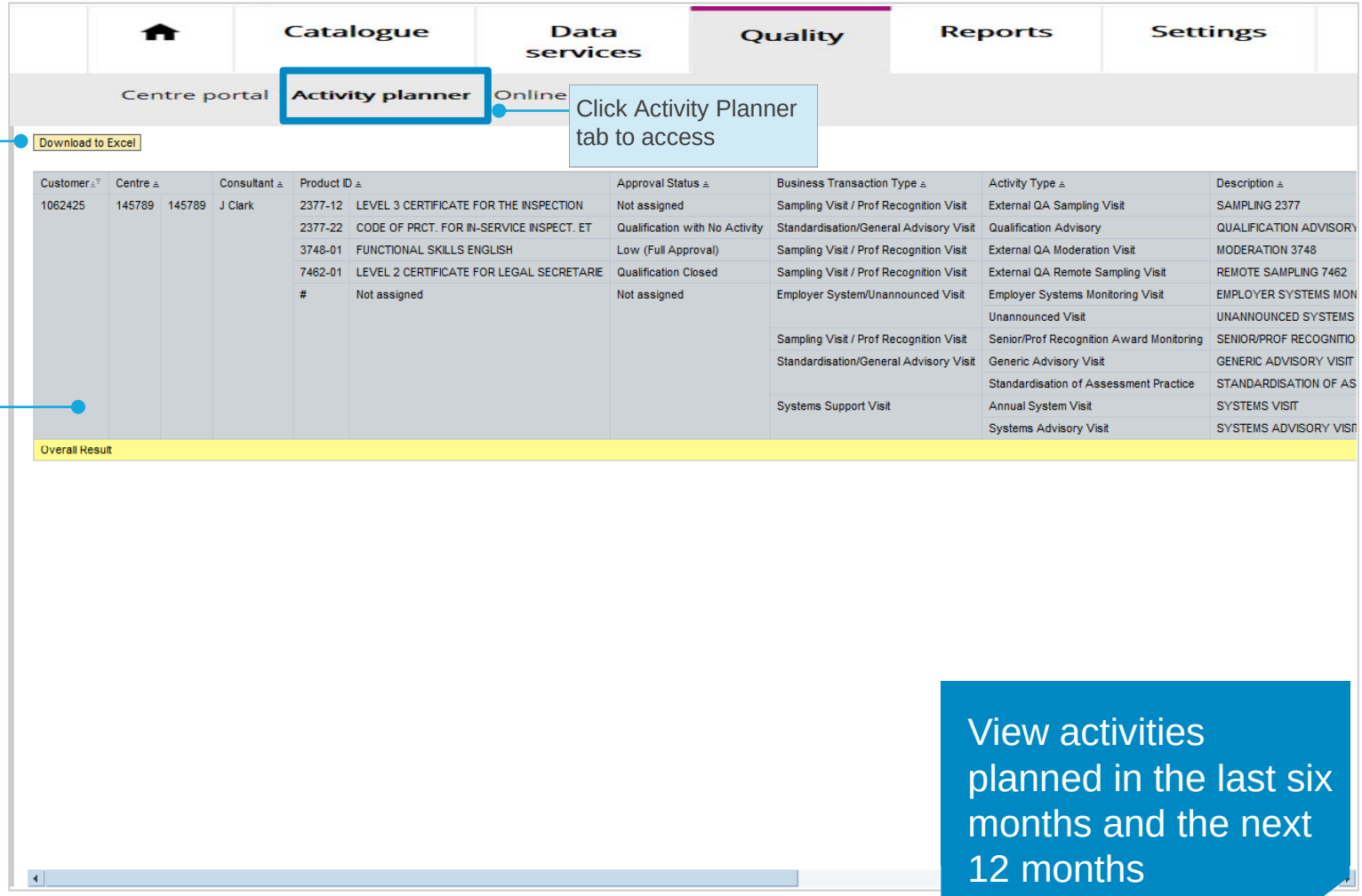
City & Guilds

SCREEN LAYOUT

Click to download data to an Excel spreadsheet and save it to a local drive.

View a list of your planned activities.

See following pages for details of how the information is displayed in each column for your activities



Customer	Centre		Consultant	Product ID		Approval Status	Business Transaction Type	Activity Type	Description
1062425	145789	145789	J Clark	2377-12	LEVEL 3 CERTIFICATE FOR THE INSPECTION	Not assigned	Sampling Visit / Prof Recognition Visit	External QA Sampling Visit	SAMPLING 2377
				2377-22	CODE OF PRCT. FOR IN-SERVICE INSPECT. ET	Qualification with No Activity	Standardisation/General Advisory Visit	Qualification Advisory	QUALIFICATION ADVISORY
				3748-01	FUNCTIONAL SKILLS ENGLISH	Low (Full Approval)	Sampling Visit / Prof Recognition Visit	External QA Moderation Visit	MODERATION 3748
				7462-01	LEVEL 2 CERTIFICATE FOR LEGAL SECRETARIE	Qualification Closed	Sampling Visit / Prof Recognition Visit	External QA Remote Sampling Visit	REMOTE SAMPLING 7462
				#	Not assigned	Not assigned	Employer System/Unannounced Visit	Employer Systems Monitoring Visit	EMPLOYER SYSTEMS MON
								Unannounced Visit	UNANNOUNCED SYSTEMS
							Sampling Visit / Prof Recognition Visit	Senior/Prof Recognition Award Monitoring	SENIOR/PROF RECOGNITIO
							Standardisation/General Advisory Visit	Generic Advisory Visit	GENERIC ADVISORY VISIT
								Standardisation of Assessment Practice	STANDARDISATION OF AS
							Systems Support Visit	Annual System Visit	SYSTEMS VISIT
								Systems Advisory Visit	SYSTEMS ADVISORY VISIT

Overall Result

Click Activity Planner tab to access

View activities planned in the last six months and the next 12 months

ACTIVITY DETAILS (1/2)

Catalogue | Data services | Quality | Reports | Settings

Centre portal | **Activity planner** | Online forms

Download to Excel

Continues on next page.

Customer	Centre		Consultant	Product ID		Approval Status	Business Transaction Type	Activity Type
1062425	145789	AP College	J Clark	2377-12	LEVEL 3 CERTIFICATE FOR THE INSPECTION	Not assigned	Sampling Visit / Prof Recognition Visit	External QA Sampling Visit
				2377-22	CODE OF PRCT. FOR IN-SERVICE INSPECT. ET	Qualification with No Activity	Standardisation/General Advisory Visit	Qualification Advisory
				3748-01	FUNCTIONAL SKILLS ENGLISH	Low (Full Approval)	Sampling Visit / Prof Recognition Visit	External QA Moderation Visit
				7462-01	LEVEL 2 CERTIFICATE FOR LEGAL SECRETARIE	Qualification Closed	Sampling Visit / Prof Recognition Visit	External QA Remote Sampling Visit
				#	Not assigned	Not assigned	Employer System/Unannounced Visit	Employer Systems Monitoring Visit
								Unannounced Visit
							Sampling Visit / Prof Recognition Visit	Senior/Prof Recognition Award Monitoring
							Standardisation/General Advisory Visit	Generic Advisory Visit
								Standardisation of Assessment Practice
							Systems Support Visit	Annual System Visit
								Systems Advisory Visit
1	1	1	2	3		4	5	6

1	Customer number, National Centre Number and Centre Name
2	Allocated EQA
3	Qualification number and description
4	Qualification approval status

5	Activity type
6	This is another way to display the activity type

ACTIVITY DETAILS (2/2)

Catalogue | Data services | Quality | Reports | Settings

Centre portal | **Activity planner** | Online forms

Activity Type	Description	Visit Chargable	Transaction No.	Planned Start Date	Actual Visit Start Date(Srv.Ord.)	Centre Visit Date(Srv.Ord.)	Number of Activities
External QA Sampling Visit	SAMPLING 2377	Not Chargeable	8000043982	20.06.2013	21.06.2013	#	1
Qualification Advisory	QUALIFICATION ADVISORY VISIT 4377	Not Chargeable	8000043989	06.03.2013	#	#	1
External QA Moderation Visit	MODERATION 3748	Not Chargeable	8000043987	02.05.2013	#	#	1
External QA Remote Sampling Visit	REMOTE SAMPLING 7462	Not Chargeable	8000043984	12.06.2013	27.06.2013	#	1
Employer Systems Monitoring Visit	EMPLOYER SYSTEMS MONITORING VISIT	Not Chargeable	8000043981	13.03.2013	#	#	1
Unannounced Visit	UNANNOUNCED SYSTEMS VISIT	Not Chargeable	8000043986	14.05.2013	#	#	1
Senior/Prof Recognition Award Monitoring	SENIOR/PROF RECOGNITION AWARD MONITORING	Not Chargeable	8000043993	28.06.2013	20.06.2013	#	1
Generic Advisory Visit	GENERIC ADVISORY VISIT	Not Chargeable	8000043991	28.06.2013	20.06.2013	20.06.2013	1
Standardisation of Assessment Practice	STANDARDISATION OF ASSESSMENT PRACTICE	Not Chargeable	8000043996	13.09.2013	20.06.2013	#	1
Annual System Visit	SYSTEMS VISIT	Not Chargeable	8000043980	17.07.2013	#	#	1
Systems Advisory Visit	SYSTEMS ADVISORY VISIT	Not Chargeable	8000043992	08.08.2013	20.06.2013	20.06.2013	1

7 8 9 10 11 12 13

7	Activity description, as entered by the Quality Team. This is the description you will see in 'My Quality Assurance Activities'
8	Indicates whether you will be charged for the activity or not.
9	Reference number for the activity, as listed in 'My Quality Assurance Activities'.

10	The tentative date for when the Quality Team planned the activity. This will be typically the first day of the month
11	The actual activity date agreed between you and the EQA. If this is blank, it's because the date has not been arranged yet.
12	The date when the report was submitted (if available)

13	Please ignore.

QUALITY PORTAL

APPENDIX 1: PROCESS OVERVIEW (1/3)

City & Guilds

QAP

Qualification Approval Applications

(when a visit is required)

APPROVAL APPLICATION	APPROVAL VISIT		APPROVAL OUTCOME
YOU Submit a QAP form in the Walled Garden	**WE** Allocate an EQA to conduct the approval visit	**EQA** Conducts the approval visit	**WE** Process the Qualification Approval Report (QAPv)
WE Receive your application	**EQA** Contacts you to agree a visit date	**EQA** Submits QAPv	**WE** Email you to confirm the outcome.
	YOU View your approval visit in the Walled Garden	**YOU** Complete action points raised by the QC	**YOU** View the new Qualification in the Walled Garden

Status of your Approval Application in the Walled Garden	**Application received**	**Approval visit in progress**	**Application processed**
Status of your Approval Visit in the Walled Garden		• **Consultant/EV Assigned** • **Visit Scheduled**	**Consultant/EV report submitted**

QUALITY PORTAL

APPENDIX 1: PROCESS OVERVIEW (2/3)

City & Guilds

External QA Sampling Activities

ACTIVITY PLANNING → ACTIVITY → OUTCOME

WE Plan an Activity and allocate an EQA

WE Email you a CA1 form confirming the activity

YOU Submit a CA2 form in the Walled Garden

EQA Submits a PA1 form in the Walled Garden

EQA Conducts activity

YOU **View** CAR in the Walled Garden

YOU View your activity in the Walled Garden

EQA Views CA2 form in the Walled Garden

YOU **View** PA1 form in the Walled Garden

EQA Submits Activity Report (CAR) in the Walled Garden

YOU Complete any action plans required

EQA Contacts you to agree an activity date

WE Process the Consultant Activity Report (CAR) and inform you of any changes of status

YOU View the qualification status updated in My Qualifications in the Walled Garden

Status of your Activity in the Walled Garden

In process with Consultant

Visit scheduled

CA1 received

CA2 sent to consultant

PA1 received

Report in Progress

Report Completed

QUALITY PORTAL

APPENDIX 1: PROCESS OVERVIEW (3/3)

City & Guilds

Non-sampling activities

ACTIVITY PLANNING			ACTIVITY	OUTCOME
WE Plan an Activity and allocate an EQA	**EQA** Contacts you to agree an activity date	**If Systems Visit…**	**EQA** Conducts activity	**YOU View** CAR in the Walled Garden
YOU View your activity in the Walled Garden		**EQA** Sends you a Systems Visit confirmation letter	**EQA** Submits Activity Report (CAR) in the Walled Garden	**YOU** Complete any action plans required
			WE Process the Consultant Activity Report (CAR	

Status of your Activity in the Walled Garden

- **In process with Consultant**
- **Visit scheduled**
- **Report in Progress**
- **Report Completed**

APPENDIX 2: QUALITY ADD ON PROFILES

There are three different add on profiles for the Walled Garden Quality Portal:

- Full Access
- Admin
- Read-only

The Primary User/s at your centre will set-up your account with the required profile.

The table below summarises the different areas of the portal and the level of access associated with each profile:

	Full Access	Admin	Read-only
My Approval Applications	Yes	Yes	Yes
My Approval Visits	Yes	Yes	Yes
My Qualifications	Yes	Yes	Yes
My Quality Assurance Activities	Yes	Yes	Yes
My Centre Updates	Yes	Yes	Yes
Online Forms	View all forms. Submit all centre forms.	View all forms. Submit Centre Update and CA2 forms only.	View all forms. No form submission
Activity Planner	Yes	Yes	Yes

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