

# External Quality Assurer

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# Walled Garden Quality Portal



Frequently asked questions

User guides

clicking on any of the questions will take you to the answer

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# 1 LOGGING ON AND TECHNICAL REQUIREMENTS

## 1.1 How do I access the system?

Through the Walled Garden. Just log in as usual and click on the **Quality** tab you will see at the top, next to Catalogue/Shop.

## 1.2 How do I reset my password?

The image shows two screenshots of the Walled Garden administration system interface. The top screenshot is the login page, and the bottom screenshot is the password reset page. Both pages feature the City & Guilds, ilm, and WalledGarden logos at the top. The login page has a 'Username' field containing '202130', a 'Password' field, a 'Sign in' button, and a 'Problems logging in?' link. The password reset page has a 'Reset your password' section with a field containing '202130', a 'Submit' button, and a 'Back' button. A 'Contact Us' section with a dropdown menu is visible at the bottom of the reset page.

**To reset your Walled Garden password**

1. Enter your 20\_ \_ \_ \_ number

Click here

Enter your 20\_ \_ \_ \_ Number and click

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for customers of the City & Guilds Group

The email address you entered is being checked against our user database. If your email address is matched, an email will be sent to you with instructions on how to reset your password.

Contact Us

England

City & Guilds

- 0844 543 0000
- (Mon-Fri 08:00-18:00 GMT)
- [centresupport@cityandguilds.com](mailto:centresupport@cityandguilds.com)

ILM

- 01543 266867
- (Mon-Thur 08:00-18:00; Fri 08:00-16:30 GMT)
- [customer@i-l-m.com](mailto:customer@i-l-m.com)

The email will look like this

**Resetting your Walled Garden password**

Please note that this email was sent from a Notification Only address that does not accept incoming email. Please do not reply to this message.

You have received this email because someone requested a password reset for this email address. If you did not request this, please ignore this email.

If you did request a password reset, please click on the link below.

**Important: Please note the following about the new password you choose:**

Your password:

- Must NOT begin with ! (exclamation mark) or ? (question mark)
- Must NOT be comprised entirely of numbers
- MUST be 6 to 8 characters in length
- IS case sensitive

Please do not use Common passwords such as 1234 , password or abcde as these will not be recognised

Click on the link

[Resetting your Walled Garden password](#)

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for customers of the City & Guilds Group

### Reset your password

Please confirm your identity by answering the security questions below.  
At the end of the form you can select your new password.

First name:

Last name:

New password:

Confirm new password:

Change password

Complete the fields

Click on 'change password'

### Reset your password

Please confirm your identity by answering the security questions below.  
At the end of the form you can select your new password.

First name:

Graham

Last name:

Walker

New password:

●●●●●●●●

Confirm new password:

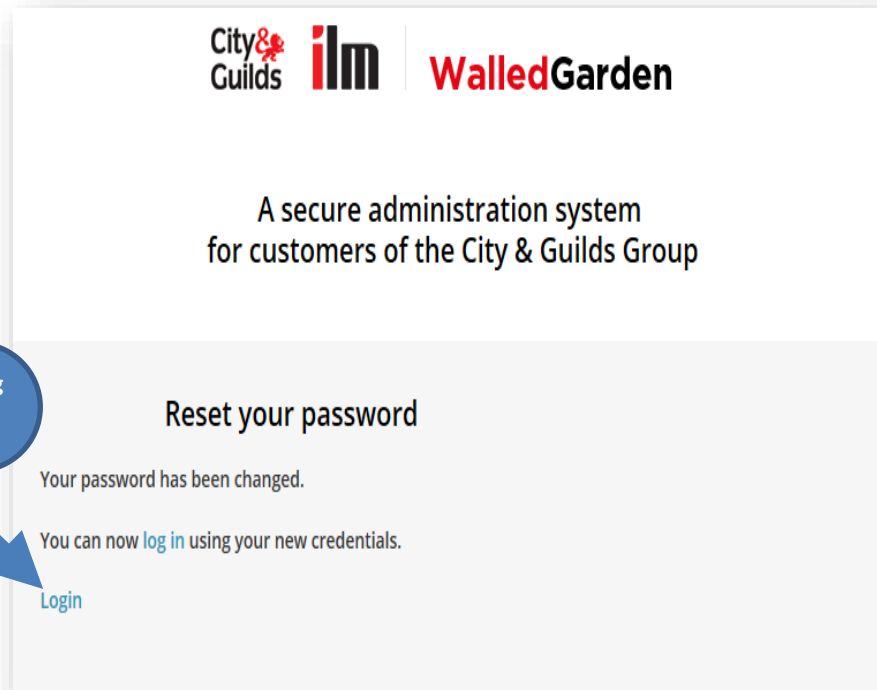
●●●●●●●●



Change password

You will then need to confirm your details  
Please remember that all fields are case sensitive

Click on 'change password'



### 1.3 Do we have to use Internet Explorer or can we use other browsers?

The browsers that support the Walled Garden are as follows:

*If you are using Windows XP/Vista you will require Internet Explorer 9, 10 Or 11- Windows 7 or Windows 8.*

*Chrome and Firefox are also compatible – Windows 7*

### 1.4 What are the system requirements for the Quality Portal?

The Quality Portal is part of the Walled Garden, so the technical requirements are the same.

*The Walled-Garden is not compatible with Internet Explorer 5.2.3 for Mac, with Apple's Safari web browser (all versions) or Firefox 3.6/4.0.*

However, to use the download and upload report facility you will need to use 'Microsoft Silverlight' and the 'City & Guilds Offline Quality Forms' application (download from the Walled Garden).

## 2 GENERAL FUNCTIONALITY

### 2.1 What can I do in the Walled Garden Quality Portal?

In the Walled Garden Quality Portal you can:

- view the list of qualifications in your portfolio,
- view and amend your personal contact details,



- view your allocated Centres with their contact details and approval status,
- view your Centre submitted forms (CAP/QAP, CA2), where centres have been rolled out on the new system
- see what activities (visits) the Quality Team has allocated to you,
- view, create, complete and submit all your activity and visit planning reports (CAPV, QAPV, CAR, PA1)
- view reports including Traffic
- submit expense claims online (not International)

## 2.2 Do I have to complete all of my activities on the Walled Garden?

Yes, you have to complete all your activity reports in the Walled Garden.

## 2.3 Do we continue to carry out remote sampling activities?

Yes. Remote quality assurance activities are still an option, depending on Centre and qualification risk and requirements. Your Quality Team will indicate the type of activity you are required to do.

## 2.4 Will Centres have access to the Walled Garden Quality Portal as well?

Yes, all centres are now migrated onto the new system. Centres will now have a new facility in the Walled Garden which will allow them to submit forms, as well as viewing your completed activity reports (CARs).

## 2.5 Does it matter that I work with more than one quality office?

No. Each Quality Team will be able to allocate activities to you. All activities will show together on your 'My Activities' page.

## 2.6 Can you open more than one document (form) at the same time?

No.

## 2.7 Can we save a half completed form?

Yes, if you are working online just press save at the bottom of the form or the 'floating' save button on the right hand side of your screen. This will save the report on the system and you will be able to return to it by clicking on 'Change'. You will then be able to complete the form and submit it. It is advisable to click 'Save' as you go along, to ensure you do not lose any data.

If you are working offline click on the save button at the top of the CAR report. This will save a new version number each time you save, ensure you always return to the latest version of the report.

## 2.8 Does the system show traffic reports?

Yes. There is a tab on the Quality page titled 'Reports' click and the select the tab 'Candidates/Results' to view registrations and certifications.

The screenshot displays the 'Candidates/Results' section of the Walled Garden Quality Portal. The top navigation bar includes 'Home', 'Candidates/Results', 'RS', 'Qualifications', 'Financial', and 'Amend On Demand Orders'. The 'Candidates/Results' tab is highlighted. Below the navigation bar, there is a search area on the left with a 'Search' button and a dropdown menu set to 'Registration Listing'. The main content area is titled 'Candidates / Results reports' and contains a welcome message, a search area, and a question mark icon for assistance.

## 2.9 Can I see whether another EQA is also allocated to the same Centre I am allocated to?

No

## 2.10 How does the system alert you when activities are altered?

Currently there is no alert system in place.

## 2.11 What if I cannot view my Quality Tab?

Please email [associate.eqa@cityandguilds.com](mailto:associate.eqa@cityandguilds.com)

## 2.12 I cannot view any activities in 'My Activity' page

Make sure the **search period you selected is wide enough** to cover the Planned Activity Date for the activities you need to see. If you cannot view any 'Activities' in the 'My activity' page change the date range you are using to 12 months previous and 12 months in the future.

If you're still unable to see all of your Activities, check that you have **used both scroll bars** one for the system and one for your computer/laptop screen



■	■	8000006935	Remote Monitoring 4239	028378	South Nottingham College	07.12.2012	07.12.2012	07.12.2012	07.12.2012	Visit Scheduled	■	■
■	■	8000007085	Sampling visit 4234	018125	Norwich City College	07.01.2013	07.01.2013	25.02.2013	25.02.2013	CA1 sent to Customer	■	■
■	■	8000007203	Sampling visit 4234, 4239	065349	Northbrook College	01.12.2012	01.12.2012	18.12.2012	18.12.2012	CA1 sent to Customer	■	■
■	■	8000007382	Remote Visit 4234 4238 3231	005065	School of Dental Nursing	15.01.2013	15.01.2013	15.01.2013	15.01.2013	CA1 sent to Customer	■	■
■	■	8000007692	Sampling Visit 4234	053831	Cornwall College Camborne	06.12.2012	06.12.2012	06.12.2012	06.12.2012	CA1 sent to Customer	■	■

If you tried the above and are still unable to see your activities, contact the Quality Delivery team.

## 3 SYSTEM TERMINOLOGY

### 3.1 What does the term 'Activities' mean for my role?

This is the term used for all quality assurance activities in a Centre, whether it is a Sampling visit or Remote Sampling activity, Systems Visit, Systems Advisory Visit or any other EQA activity.

### 3.2 What is a CAR report?

CAR stands for 'Centre Activity Report'. You need to complete a CAR report for every activity. There are different versions of the CAR report for each activity type (e.g. sampling visit, systems visit, exam audit, etc).

### 3.3 What is the 'Transaction' number?

Each activity has a unique transaction number. The transaction number allows you to open the CAR report, as well as all other forms related to the same visit (e.g. PA1). Transaction numbers are ten-digit long and they always start with '800'.

### 3.4 In My Qualifications, what do the 'Valid from' and 'Valid to' dates mean?

These dates show the period during which you are approved to work with each qualification in your portfolio. The 'Valid to' date is a system default date only.

### **3.5 What is the difference between Centre Risk and Qualification Risk?**

The Centre risk is determined by a number of factors including intelligence we have on the Centre, qualifications offered, failure to address action plans, information on Centre Updates including sudden increases/ decreases in staff, assessment sites, etc. The Qualification Risk is determined as a result of a sampling activity or a qualification 'awaiting first positive report'.

### **3.6 What does SAP mean?**

SAP is the system that we use internally at City & Guilds. Walled Garden runs on SAP.

### **3.7 What is an Activity Planner?**

The Activity Planner is the plan for all activities offered to a Centre including for example; Systems and Qualification Sampling.

## **4 VISIT PLANNING**

### **4.1 Can I see the Activity Planners for my Centres?**

The Quality Team can provide Systems Consultants with a copy of the Centre's activity planner.

### **4.2 How much notice will the Quality Team give me when allocating an activity to me?**

Approximately 6 months' notice

### **4.3 Will the system alert me when an activity has been planned by the Quality Office?**

No. You will need to regularly log in to check for new activities. . The Quality Team will call or email you if a short notice activity is needed.

### **4.4 Who agrees the visit dates between the EQA and the Centre?**

The Quality Team will agree the month of the next visit. They will enter the 1<sup>st</sup> of the month in the 'Planned Visit date' fields in the Walled Garden. You will be expected to agree with the Centre a visit date within that month. Once the date is agreed with the Centre, you will enter it in the 'Actual Visit Date' fields in Walled Garden.

### **4.5 What do I do if I cannot carry out the activity on the date proposed by the Managing Quality Office?**

The date proposed by the Quality Team is only tentative to give you an indication of when they would like you to carry out the activity. You should contact the Centre and arrange a suitable date that is not too far from the date proposed by the Quality Team (within the month). Once the date has been agreed, you need to enter it in the system.

### **4.6 When should I reject an activity?**

You should only reject an activity when you don't want to do the activity or don't want to be allocated to that centre. The quality team will then re-allocate this.

In the case of duplicate activities, no learners or the wrong time of year for example, please contact the quality team, rather than reject the activity. The quality team will then either re-arrange or cancel the activity.

#### 4.7 Can I change a previously agreed visit date or will I need to contact the quality team?

Not in the system; you need to contact the quality team.

#### 4.8 How do I see my traffic reports for allocated Centres?

You can view the traffic reports in the 'Candidates/Results' reports on the Walled Garden see 2.9 above and the guidance below in section EQA08

#### 4.9 Do I still have access to my completed CAR reports?

Yes, you do.

#### 4.10 Will any actions from the previous visit be carried forward to the next report?

No. In the new system, the Action Improvement Plan does not carry over to the next report. For this reason, **it is imperative that you always refer to the previous report to make sure you follow up on any outstanding actions**, as a clear audit trail is required and will be monitored by the Quality Team and our regulators.

#### 4.11 How do I generate an activity report (CAR)?

In 'My Activities', you will see a list of all the activities that have been allocated to you. Each activity has a 'transaction number' which looks like this: 800xxxxxxx. To create an activity report (a CAR) click on the 800xxxxxxx number. This will open the Online Forms section in a new window. Select the correct CAR type from the dropdown and click 'Create'.

#### 4.12 Will the Quality Team tell us when we need to send out CA1s?

You will not need to send the CA1. Once you enter the actual visit date in the Walled Garden, the activity status will be updated to 'Visit scheduled'. The Quality Team will then pick it up and trigger the CA1 to the Centre. You will receive a copy as well. You will also notice that, once the Quality Team has done this, the activity status in the Walled Garden will change to 'CA1 sent to customer'.

#### 4.13 Do we still use CA1/2, PA1/2 for sampling activities?

Yes. The CA1 is an email sent by the Quality Delivery team when you enter in the Walled Garden the visit date agreed with the Centre. The CA2 will be an online form that the Centre will submit via the Walled Garden. The PA1 is an online form you create in the Walled Garden.

#### 4.14 Will the CA1 be generated automatically from the previous visit?

No

#### 4.15 How do I send a CA1 to the Centre?

The Quality Team will do this as soon as you enter the actual visit date in the Walled Garden. You will receive a copy in your email inbox.

#### 4.16 Which qualifications will the CA1 cover?

The CA1 will cover all qualifications covered by the activity, which the Quality Team has allocated.

#### 4.17 Who should chase Centres that have not submitted a CA2?

Initially, you need to chase them. If you still do not receive the CA2, please inform your Quality Delivery team.

#### 4.18 How do I view a CA2 submitted by a Centre?

The Centres submit the CA2 via the Walled Garden. You will be able to open it by clicking on the transaction number (visit number), selecting CA2 from the dropdown menu and clicking 'Display'.

#### **4.19 Will all the candidates' names transfer from the CA2 to the PA1?**

No.

#### **4.20 Will the Centre still have the option to submit their own information instead of the CA2?**

Yes. Centres can submit their own document providing it has the information you need in order to complete the PA1 taking CAMERA into consideration.

#### **4.21 What about people on e-portfolios? CA2 isn't really helpful for them.**

They can still attach requested information, as they currently do, instead of completing the CA2. They must always upload the CA2 to change the activity status to 'CA2 received', which will enable you to create the PA1.

#### **4.22 How do I send a PA1 to the Centre?**

You can create and submit a PA1 by clicking on the 800xxxxxxx in your 'My Activities' page. This will take you straight to the Online Forms page in a new window. Select 'Sampling Form PA1' from the dropdown menu and click 'Create'. If the Centre submitted a CA2 via the Walled Garden, this will pre-populate some of the information in your PA1.

Once you complete the PA1 and click 'Submit', this will appear in the Centre portal (for centres with access to it).

#### **4.23 Do I need to complete a new agenda or each Centre visit?**

Yes, you will need to create a new agenda for each activity.

#### **4.24 Can I add other qualifications to the PA1?**

No. You can only sample the qualifications allocated by the Quality teams.

#### **4.25 Will the CAR prepopulate from the PA1?**

Yes. Please remember to tick each learner that you are planning to sample.

#### **4.26 On the PA1 form, do we have to select and delete the learners to be selected?**

Not necessarily. You can either just tick to select the learners you wish to sample from the list on the PA1. Alternatively you can select and delete the learners you do not wish to sample.

#### **4.27 What if the Centre has not used the CA2, and does not provide candidate enrolment numbers?**

You will need to manually enter all details in the PA1, including those not supplied by the centre in their document replacing the CA2.

#### **4.28 Do we still need to email all visit planning docs (CA1, CA2, PA1) to the Quality teams?**

No. The CA1 will be sent by the Quality Team and the CA2/PA1 will be available in the system.

#### **4.29 How will Centres be notified their PA1 is ready to view?**

At the moment there is no automatic notification, so you can alert them if you wish. The centre will view the PA1 in the system when they log in.

#### **4.30 We often sample more than one assessment method. How can we include these on the PA1?**

You can add extra rows for each different assessment method you would like to sample for the candidates. However a simpler solution would be to include the detail in the comment box on the PA1.

#### **4.31 The unit sample box in the CAR 3 only lets you populate with numbers and some units have text**

Use the 'Details of sample' box for each learner when you need to record text for unit numbers

#### **4.32 The unit sample box in the CAR 3 only lets you populate with one unit number**

Use the 'Details of sample' box to identify all of the units you have sampled.

#### **4.33 When a Centre is reallocated, can the new External Quality Assurer view any previous CAR reports?**

No. If you need to see the CAR reports created by the previous External Quality Assurer, you need to contact your Quality Team who will provide you with the '800' numbers for those reports. With these numbers, you will be able to display the CAR reports by clicking on 'Online Forms' and entering the numbers in the 'Reference No.' box. Make sure the 'Customer No.' field is left blank.

#### **4.34 Will I see any CVs/certificates attached to the QAP by the centre**

Yes by downloading any centre attachments.

#### **4.35 Can the Quality team/Centre see the documents I attach to an activity on Walled Garden?**

Only the Quality Team will be able to see your attachments. Centres will not be able to see them.

#### **4.36 Which documents should I attach to activities?**

This will depend on the way you work and the type of activity. Examples could include: emails, schemes of work, etc.

#### **4.37 What happens if the Centre details are inaccurate or out of date?**

You need to inform the centres managing Quality team, who will get in touch with the Centre to request an update.

#### **4.38 Does the system automatically select the relevant qualifications for each activity?**

Yes. When allocating an activity to an External Quality Assurer, the Quality Team will identify the qualification that the activity relates to. All forms generated for the activity will automatically contain the correct qualification number.

#### **4.39 Is it possible to search for transaction numbers?**

No. You will need to know the '800' to be able to search for reports and view them. You can get the '800' numbers for each activity, from your 'My Activities' page.

#### **4.40 Under which circumstance would an External Quality Assurer reject a visit?**

Reasons may vary. For example, you may not want to take on another Centre activity due to your current workload, or you may have a conflict of interest.

#### **4.41 What are 'evidence types'?**

Evidence types are the various assessment methods used. For example: assignments, witness testimony, etc.

#### **4.42 Does the system validate that the information provided by Centres is accurate?**

No, but there are rules on the forms to stop Centres from omitting essential information.

#### **4.43 Why does the CA1 not indicate which learners are available on the day of a visit?**

The CA1 has not changed. It is the responsibility of the External Quality Assurer to identify which candidates they wish to meet on the day of the activity when completing the PA1.

#### **4.44 Once the PA1 has been saved and submitted, will the Centre be able to view this straight away?**

Yes, provided they have access to the portal. In the meantime, you need to email them a copy of the PA1.

## 5 SYSTEMS VISITS

### 5.1 Is the System Visit letter generated automatically?

No. You will need to submit this as you currently do to the Centre, cc Territory Office. In the future, we will try to build this into the system.

### 5.2 Will I be able to view all CARs prior to my systems visit?

You will need to request all the '800' numbers for the activities that took place at the centre within a specific date range. Once you receive the '800' numbers, you will be able to view the reports by clicking on 'Online Forms' and entering the numbers in the 'Reference No.' box. Make sure the 'Customer No.' field is left blank.

## 6 REPORTING

### 6.1 Can I generate my CAR/CAPV/QAPV report in advance of the visit?

Yes; you can always create a report and save it (without submitting) for a later date. On the date of the visit, you can re-open the report by clicking on the 800 number in your 'My Activities' page. This will take you straight to the Online Forms page in a new window. Select the report type from the dropdown box, and click 'Change'.

### 6.2 Can I complete a CAR/QAPV/CAPV when I'm not online?

Yes/No currently you can only complete the CARs offline.

If you create the form online and click 'Download' (instead of save), you will download a copy of the empty form to your hard drive. You can then complete the form offline, while you're at the centre. When you regain an Internet connection, you should create the form online again and click 'Upload'. This will allow you to upload the form you completed offline. Once you have uploaded it, you can make further amendments to the form online and submit it. Please note that, in order to use the offline form facility, you need to install the applications first. Please refer to the User Guide for details.

### 6.3 Can I add boxes for samples, staff names, etc. when working offline?

Yes you can add information offline then upload it when you get online. However we recommend that you add additional blank rows whilst online, you can then download the report and complete offline.

### 6.4 Why did my CAR not populate names from the PA1?

Please remember to always tick the sample learner box

### 6.5 Does the number of registered and certificated learners populate from the system?

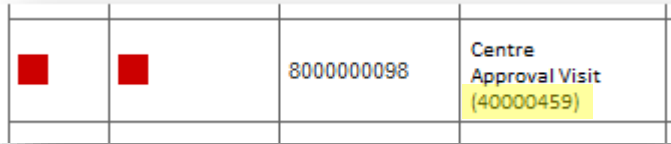
Yes usually they do populate.

### 6.6 How do I save my reports on my own system?

Your reports are always automatically saved in the Walled Garden when you submit them, and you can go back and re-open them to view them whenever you wish.

### 6.7 How do I view the CAP form submitted by a Centre?

CAP forms can be opened in the **Online Forms** section in the Walled Garden. To open a CAP form, you will need a transaction number which starts with '400'. This number identifies the centre application, and not the approval visit. The '400' number can be found in the description of the CAP visit that is listing in your 'My Activities' page.

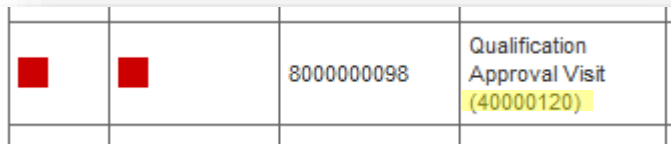


■	■	8000000098	Centre Approval Visit (40000459)
---	---	------------	--

Go to **Online Forms**, select 'Centre Approval' from the dropdown menu, make sure the 'Customer No' is blank, enter the '400' number in 'Reference No' and click 'Display'.

### 6.8 How do I view QAP forms submitted by Centres?

QAP forms can be opened in the **Online Forms** section in the Walled Garden. To open a QAP form, you will need a transaction number which starts with '400'. This number identifies the centre application, and not the approval visit. The '400' number can be found in the description of the QAP visit that is listing in your 'My Activities' page.



■	■	8000000098	Qualification Approval Visit (40000120)
---	---	------------	---

Go to **Online Forms**, select 'Qualification Approval' from the dropdown menu, make sure the 'Customer No' is blank, enter the '400' number in 'Reference No' and click 'Display'.

### 6.9 What do I do if I carry out two activities on the same day?

If you have two activities, you will have two different transaction numbers (visit numbers) and you will have to complete two reports. Each activity has its own number and its own report. You should complete all the steps for each activity, as if they were happening on different dates. The only difference will be that you will only be paid one day's fees, because you are completing both activities on the same day.

### 6.10 If I carry out a combined visit for Systems and Sampling what will the fee be?

The usual one day fee for a Systems Activity (£190).

### 6.11 Will Centres still be able to use an electronic S-form if they do not have DCS?

Yes. This process has not changed.

### 6.12 Will Standardisation External Quality Assurers be able to view their QC's activity and allocations?

No. The Standardisation External Quality Assurers will only be able to view the completed documentation for the transaction numbers (visit numbers) provided by the External Quality Assurer, on request.



### 6.13 How does my Standardisation External Quality Assurer sample my reports?

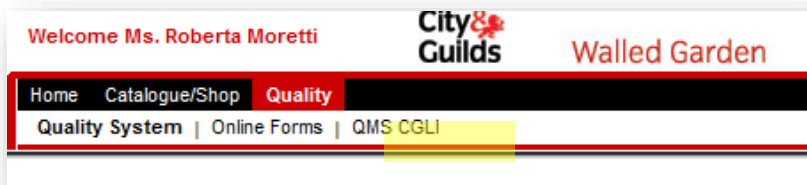
Your Standardisation External Quality Assurers will request that you give them the '800' numbers for the visits they wish to sample. Those numbers will allow them to view your reports.

### 6.14 How do I receive any Centre Updates from Centres?

The Quality Team will email you the transaction number for the relevant Centre Update Forms. These will start with '600'. Once you have the transaction number, you can view the Centre Update Form in the Online Forms section, in the same way you view all other forms.

### 6.15 Do I have access to old QMS reports?

Yes. There is a QMS tab within the Quality section of the Walled Garden, which gives you access to the old QMS reports.



### 6.16 Does the CAR automatically populate the risk of the qualifications I am sampling?

No. You will need to refer to your copy of 'Our Quality Assurance Requirements' to justify your decision on the qualification risk level.

### 6.17 Can I add Centre staff members to the forms manually?

Yes. These are free text boxes.

### 6.18 Is there enough space on the CAR form for additional comments? The field seems very small.

Yes. The comments section expands as you type.

### 6.19 If a CAR report has been created and saved, can the visit be changed?

Yes.

### 6.20 How can I be sure that my reports have been submitted successfully?

You will see a confirmation screen with a green tick to indicate that the form has been submitted successfully.

### 6.21 What if I do not see confirmation screen when I have submitted my report?

You will need to look through the report for any text in red highlighting areas that are not completed correctly. Please note you will only see these error notices when you click on submit.

### 6.22 How will the usual fees be calculated?

Fees and expenses are calculated in line with the standard fees listed in the External Quality Assurer handbook. Expense claims are to be submitted to the relevant Quality Team per activity using the expense claim form that is currently used. You must quote the transaction number (visit number) that starts with '800'.

### 6.23 Why can I not complete all of the boxes in the CAR report?

These boxes will populate from the system once the centres are fully migrated.

## 7 MY PERSONAL DETAILS

### 7.1 Who has access to my personal details on this system?

In line with Data Protection legislation, your personal details will only be accessible by you and City & Guilds staff.

### 7.2 How do I amend my personal details?

If your personal details need amending, go to the 'My Personal Data' section in your Walled Garden and complete as necessary. See user guide, page 8.

### 7.3 What do I do if I need to amend my financial details?

You will need to inform [masterdataservices@cityandguilds.com](mailto:masterdataservices@cityandguilds.com)

## 8 SUPPORT

### 8.1 What support is available to me?

On the City & Guilds Website you can view a recorded webinar, the combined handbook is available, also the Standardisation External Quality Assurer and Associate Manager are available to offer you support.

### 8.2 Who do I contact if I have problems with the new IT system?

If you have any issues with functionality or data showing in the system, please contact your managing quality delivery team. For questions regarding how to use the system, please contact your Standardisation External Quality Assurer or Associate Manager.

## 9 TIMELINES

### 9.1 Will there be any additional functionality available at a later stage?

We will confirm these enhancements nearer the time.

## 10 Glossary

Activity	This is the term used for all quality assurance activities in a Centre, whether it is a Sampling visit or Remote Sampling activity, Systems Visit, Systems Advisory Visit or any other EQA activity.
Activity Planner	Activity Planner is a report taken from data in the Walled garden for each centre, this report includes activities planned for the centre.
400 Number	This is the number you will use to view the CAP/QAP submitted by the centre.
800 Transaction Number	This is the number allocated to each activity, you will be able to view these in your 'My Activities' page in the Walled Garden. You will use this number to create, view and complete your reports for any activities that you will be carrying out.
CAR	CAR stands for 'Centre Activity Report'. You need to complete a CAR report for every activity. There are different versions of the CAR report for each activity type (e.g. sampling visit, systems visit, exam audit, etc.
Qualification Risk Level	This is the qualification's approval status. Low means Direct Claim Status (DCS). Medium means 'no certification'. High means 'no registration or certification'.
SAP	SAP is an internal system that we use as City & Guilds staff.

# **USER GUIDE**

**April 2019**

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**EQA01**

**WALLED GARDEN**

**NAVIGATION**

# EQA01: WALLED GARDEN NAVIGATION

## HOME PAGE

We recommend you do not use the back button in the browser as sometimes this may cause loss of data.

The screenshot shows the City & Guilds Walled Garden website. The browser address bar shows the URL <https://www.walled-garden.com>. The page header includes the City & Guilds logo, the text 'Welcome Ms. Roberta Moretti', and 'Walled Garden'. A navigation menu at the top has 'Home', 'Catalogue/Shop', 'Reports', and 'Quality' (which is highlighted with a blue box and an arrow pointing to the 'Access to Quality Welcome page' annotation). Below the navigation, the main content area says 'Welcome to the Walled Garden' and 'A secure administration area for registered users'. It lists features available via the Quality tab: 'View your allocated centres', 'Manage all activities allocated to you', 'Amend your personal details', and 'View and submit your expenses'. A key icon is shown to the right. At the bottom, there are sections for 'Maintenance Alerts and Important Notices' (with a sub-section for 'Weekly planned maintenance') and 'Help and Information'.

Access to Quality Welcome page

This is the first page you will see when you log onto the Walled Garden.

# EQA01: WALLED GARDEN NAVIGATION

## QUALITY WELCOME PAGE

Access online forms

Access QMS reports archive and traffic reports.

Welcome Ms. **Erta Moretti** **City & Guilds** Walled Garden [Help](#) | [Personalize](#) | [Log off](#)

[Home](#) [Catalogue](#) [Shop](#) [Reports](#) [Quality](#)

[Quality System](#) [Online Forms](#) [QMS CGLI](#)

History [Back](#) [Forward](#)

### Search

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

Show me: **My Centres**

For Centre: T1058795 AP Trainin

For Awarding org: City & Guilds

**Search**

### Quality System

### Welcome

Here you will be able to:

- View your allocated Centres
- View and manage all activities allocated to you
- View and amend your personal details, including submitting your CPD
- View and submit your fees and expenses

This is the **Quality Welcome** page, from where you can access all the different options that are available to you. Use The **Show me** dropdown menu and the **Online Forms / CGLI QMS** tab.



# EQA01: WALLED GARDEN NAVIGATION

## MY CENTRES

Welcome Rita Smales Walled Garden [Help](#) | [Personalize](#) | [Log off](#)

[Home](#) [Catalogue/Shop](#) [Reports](#) [Quality](#)

[Quality System](#) | [Online Forms](#) | [QMS CGLI](#)

[History](#) [Back](#) Forward

### Search

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

Show me:  ①

For Centre:  ②

For Awarding org:  ③

④

### My Centre Details

#### Centre Details ⑤

Customer Number	Centre Number	Centre Name	Address	Telephone
0001003533	064190	East Surrey College	,London Road,Redhill,GB,RH1 2JT	01737 772611

#### Centre Contact Details ⑥

Centre Contact Name	Centre Contact Telephone	Centre Contact Mobile	Centre Contact Email	Contact Type
Rechelle Martin			celia.chriette@cityandguilds.com	LO
Rehana Awan			june.lang@cityandguilds.com	QC
Centre Contact	+442154524582		lenin.doss@cityandguilds.com	QC

#### Qualification Details ⑦

Qualification	Description	Approval Status	Approved Date	Last Registration Date	Last Certification Date
3172-32	Level 3 NVQ in Health and Social Care - Children and Young People	Low (Full Approval)	10.09.2012	31.12.2010	31.12.2013
3172-31	Level 3 NVQ in Health and Social Care - Adults	Medium (Registration Only)	10.09.2012	31.12.2010	31.12.2013
8985-75	Level 2 Certificate in ESOL International (Spoken, Expert C1)	Medium (Registration Only)	10.09.2012	31.08.2014	
4872-12	Level 2 Certificate in Travel and Tourism (Air Fares and Ticketing)	Low (Full Approval)	10.09.2012	31.12.2013	
3592-10	The Individual Profile in Active Citizenship	Low (Full Approval)	10.09.2012	31.03.2013	

- Select **My Centres**
- Select one of your **allocated centres** from the dropdown
- Select the **Awarding Organisation** (only if the centre is ILM or International)
- Click **Search**
- View **centre details**
- View **centre contacts**
- View the **qualifications you are allocated to**, at the selected centre

This is the qualification approval status

Date when the centre was approved for this qualification.

On this section, you can see all the centres you are allocated to.

# EQA01: WALLED GARDEN NAVIGATION

## MY QUALIFICATIONS

Welcome Lesley Hanson Walled Garden [Help](#) | [Personalize](#) | [Log off](#)

Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | QMS CGL

Click on any of the column headers to sort alphabetically.

**Search**

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

1 Show me:

2 **Search**

- 1 **Select My Qualifications**
- 2 **Click Search**
- 3 All the qualifications which you are currently approved to EQA will appear on the table. Scroll down to see the whole list.  
  
Qualifications will stop showing when their last certification date has past.

My Qualifications **3**

Qualification	Description	Valid From	Valid To	Last Registration Date	Last Certification Date
0666-01	0666-01 L3 cert in Petroleum Process	30.08.2012	30.08.2012	01.01.2015	01.01.2015
0666-03	0666-03 L3 Cert in Oil & Gas Well Te	30.08.2012	30.08.2012	01.01.2015	01.01.2015
2391-01	2391-01 "L3 Cert in Inspect, Testing"	30.08.2012	30.08.2012	01.01.2015	01.01.2015
3638-01	3638-01 Key Skills Qualifications	30.08.2012	30.08.2012	01.01.2015	01.01.2015
7318-01	7318-01 Level 3 NVQ in Learning and Deve	30.08.2012	30.08.2012	01.01.2015	01.01.2015
7318-03	7318-03 Level 4 NVQ in Learning and Deve	30.08.2012	30.08.2012	01.01.2015	01.01.2015
7262-01	7262-01 L 1 Cert for IT Users	30.08.2012	30.08.2012	01.01.2015	01.01.2015
3014-01	3014-01 L1 NVQ in Hairdressing	30.08.2012	30.08.2012	01.01.2015	01.01.2015
8985-71	8985-71 Entry Level Certificate in ESOL	30.08.2012	30.08.2012	01.01.2015	31.08.2014
8985-74	8985-74 Level 1 Certificate in ESOL Inte	30.08.2012	30.08.2012	01.01.2015	31.08.2014
0666-02	0666-02 L2 Certificate in Oil R	30.08.2012	30.08.2012	01.01.2015	01.01.2015
2391-02	2391-02 "L3 Cert Design, Erection & Ve"	30.08.2012	30.08.2012	01.01.2015	01.01.2015
9003-51	9003-51 Modern Apprenticeship in inf	30.08.2012	30.08.2012	01.01.2015	01.01.2015

This is the date when you were approved to EQA this qualification.  
  
(The Valid to date is only a system default date.)

On this section, you can see all the qualifications that you are approved to EQA

# EQA01: WALLED GARDEN NAVIGATION

## MY PERSONAL DATA

Welcome Ms. Roberta Moretti

City & Guilds Walled Garden

Help | Personalize | Log off

Home Catalogue/Shop Reports Quality

Quality System | Online Forms | QMS CGU

History Back Forward

Search

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

Show me: My Personal Data

Search

My Personal Data

Walled Garden ID	Consultant ID	First Name	Last Name
200035	0100021807	Roberta	Moretti

Contact Details

Amend	House No	Street	City	Country	Postcode	Telephone	Mobile	Email
<input type="checkbox"/>	23	Lydford Road	London	GB	NW6 7RT			moretti@moretti.co.uk

Address Change

House No	From: 23	To: 23
Street	From: Lydford Road	To: Lydford Road
City	From: London	To: London
Country	From: GB	To: GB
Postcode	From: NW6 7RT	To: NW6 7RT
Telephone	From:	To:
Mobile	From:	To:
Email	From: moretti@moretti.co.uk	To: moretti@moretti.co.uk

Cancel Save Changes

This is your Walled Garden login

This is an internal system number. You may need to quote this if you need to report a problem with the system.

1 Select My Personal Data

2 Click Search

3 View your name and system identification details.

4 View your contact details. To make changes, click on Amend, complete the relevant fields and click save Changes.

On this section, you can view and amend your personal details. City & Guilds will be notified of any changes you make and our systems will be updated accordingly.

# EQA01: WALLED GARDEN NAVIGATION

## MY ACTIVITIES (1/2)

If you are unable to carry out the activity click on the red square the Local Office will then allocate another consultant.

Home Catalogue/Shop Reports **Quality**  
Quality System | Online Forms | QMS CGLI

History [Back](#) Forward

**Search**

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

Show me: **My Activities** 1

For Centre: **All my Centres** 2

For Awarding org: **City & Guilds**

For Status: **All Statuses**

For period: **last week** 3

Or From: **04.06.2012** To: **20.06.2013**

**Search** 4

**Activity Details** 5

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs
■	■	8000044009	Examination Moderation 3748-01, 4222-21	064190	East Surrey College	11.08.2013	11.08.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■
			Half day	East					00.00.0000	4	In Process with Consultant/EV	■	■
									00.00.0000	4	In Process with Consultant/EV	■	■
									00.00.0000	8	In Process with Consultant/EV	■	■
									00.00.0000	4	In Process with Consultant/EV	■	■
									00.00.0000	8	In Process with Consultant/EV	■	■
									00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000043839	40002306 Remote QAP 0059-21	064190	East Surrey College	01.01.2013	01.01.2013	00.00.0000	00.00.0000	4	Consultant/EV Assigned	■	■
■	■	8000043838	40002305 QAP Visit 0666-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	00.00.0000	00.00.0000	8	Consultant/EV Assigned	■	■
■	■	8000002020	Sampling 4222-21 3748-01	064190	East Surrey College	04.02.2013	04.02.2013	25.02.2013	25.02.2013		PA1 sent to Customer	■	■

**1** Select **My Activities**

**2** You can **Filter** by Centre, Awarding Org (only if you work with ILM or International)

**3** Select a **search period** for the **Planned Visit date**.

**4** Click **Search** to display data

**5** **View** a list of your allocated activities.

The period should be wide enough to cover the 'planned visit date' of the activities you want to see.

For example: 'last year' will only show activities with a Local Office Planned Visit date in the last year. To see activities planned for the future, select a period in the future, select 'next week', 'next month, or 'next year'.

We recommend that for a comprehensive view of all your activities, select a date range from 12 months previous to 12 months in the future.

# EQA01: WALLED GARDEN NAVIGATION

## MY ACTIVITIES (2/2)

Click on any column header to sort data.

- 1** **Transaction number:** This is the number that identifies the visit. You'll need this number to create/open any forms relates to the visit, and to claim for your expenses.
- 2** **Type of activity:** this will indicate if it is a Sampling visit, a remote sampling, a QAP visit, etc.
- 3** **Planned date:** this is the date indicated by the Local Office. You should schedule your visit to take place on or around this date. (Start and end date will always coincide)
- 4** **Actual date:** this is the visit date that you agreed with the centre; when the visit will actually take place. (Start and end date must always coincide)
- 5** **Activity Duration:** Indicates Full Day or Half Day. For old activities you may still see the 'old style' duration as 8 (indicating full day) or 4 (indicating half day).
- 6** **Status:** This indicates at what stage in the process you are.

| History [Back](#) Forward

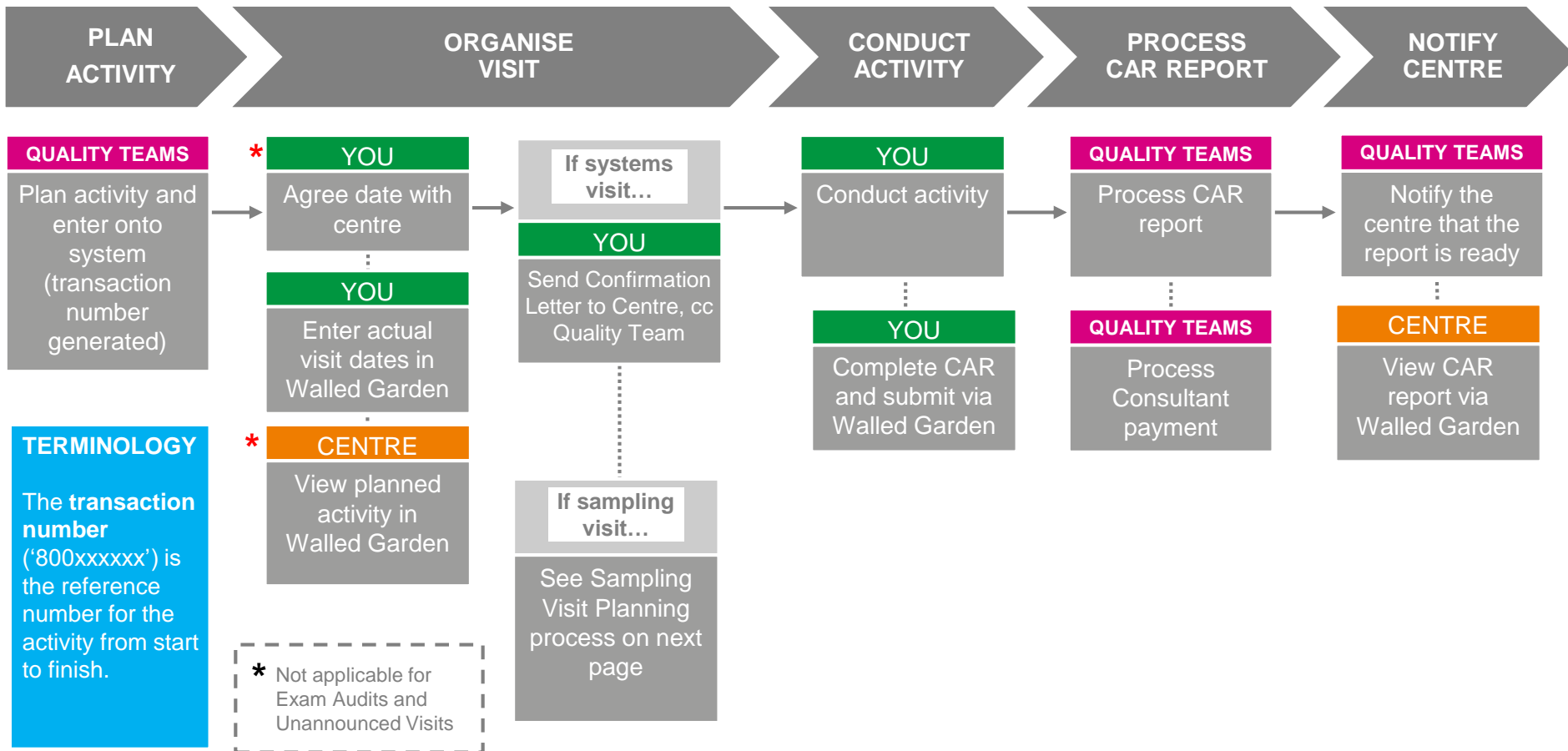
Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs
■	■	8000044009	Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	Full Day	with Consultant/EV	■	■
■	■	8000044007	Half day Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	Half day	In Process with Consultant/EV	■	■
■	■	8000044005	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	00.00.0000	00.00.0000	Half day	In Process with Consultant/EV	■	■
■	■	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.05.2013	01.05.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■	■
■	■	8000044001	Exam Audit 3892	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■	■
■	■	8000044000	Systems Visit	064190	East Surrey College	11.04.2013	11.04.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■	■
■	■	8000043999	Systems Visit (half day)	064190	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000043839	40002306 Remote QAP 0059-21	064190	East Surrey College	01.01.2013	01.01.2013	00.00.0000	00.00.0000	Full Day	Consultant/EV Assigned	■	■
■	■	8000043838	40002305 QAP Visit 0668-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	00.00.0000	00.00.0000	8	Consultant/EV Assigned	■	■
■	■	8000002020	Sampling 4222-21 3748-01	064190	East Surrey College	04.02.2013	04.02.2013	25.02.2013	25.02.2013	Half day	PA1 sent to Customer	■	■

**EQA02**

**VISIT PLANNING**

# EQA02: VISIT PLANNING

## PROCESS OVERVIEW

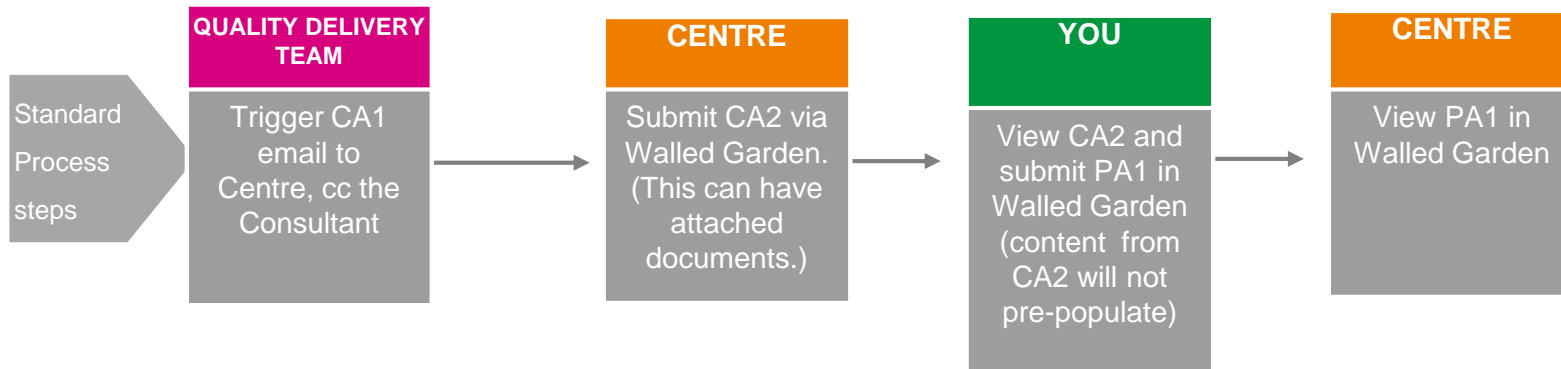


### ACTIVITY STATUS IN THE Walled Garden



# EQA02: VISIT PLANNING

## SAMPLING VISIT PLANNING



### ACTIVITY STATUS IN THE Walled Garden

CA1 SENT TO CUSTOMER

CA2 RECEIVED

PA1 SENT TO CUSTOMER



# EQA02: VISIT PLANNING

## STATUS OF SAMPLING ACTIVITIES

This is a summary of all the statuses a sampling activity goes through. Each step and status is explained in the following slides.

■	■	8000044055	Sampling 7083	064190	East Surrey College	03.07.2013	03.07.2013	08.07.2013	08.07.2013	8	In Process with Consultant/EV	■	①	■
■	■	8000044057	Sampling 3692	064190	East Surrey College	03.07.2013	03.07.2013	08.07.2013	08.07.2013	8	Visit Scheduled	■	②	■
■	■	8000044059	Sampling 7082	064190	East Surrey College	03.07.2013	03.07.2013	08.07.2013	08.07.2013	8	CA1 sent to Customer	■	③	■
■	■	8000043951	Sampling	064190	East Surrey College	17.07.2013	17.07.2013	24.07.2013	24.07.2013	8	CA2 Received	■	④	■
■	■	8000044182	Sampling	064190	East Surrey College	09.09.2013	09.09.2013	09.09.2013	09.09.2013	8	PA1 sent to Customer	■	⑤	■
■	■	8000044184	sampling activity	064190	East Surrey College	09.09.2013	09.09.2013	09.09.2013	09.09.2013	8	CAR Report Submitted	■	⑥	■
■	■	8000043955	Sampling	064190	East Surrey College	17.07.2013	17.07.2013	24.07.2013	24.07.2013	8	CAR Report Completed	■	⑦	■

**NEW status: CAR Report Completed**

This indicates that the Managing **QUALITY TEAMS** have reviewed and processed the report, and that it is available for the Centre to view.

# EQA02: VISIT PLANNING

## ENTERING THE ACTUAL VISIT DATE

Activity Details

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs
<input type="checkbox"/>	<input type="checkbox"/>	8000044000	External Moderation 3748-01, 4222-21	064190	East Surrey College					0.0000	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000044007	Half day Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000044005	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey College						In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000044001	Exam Audit 3692	064190	East Surrey College						In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000044000	Systems Visit	064190	East Surrey College						In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			East Surrey College							In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>			East Surrey College							In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000043838	QAP Visit	064190	East Surrey College						In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>

Click here to enter dates

The status of the activity will be in 'In process with Consultant/EV'

Enter visit date agreed with centre. Start and End date must always coincide. (Visits always start and end on the same day)

Plan Visit

Plan Visit Start Date: 01.05.2013  
Plan Visit End Date: 01.05.2013  
Actual Visit Start Date: 27.06.2013  
Actual Visit End Date: 27.06.2013

Cancel Save Changes

Click to save date. Status of activity will change to **Visit Scheduled**. The QUALITY TEAMS will then send a CA1.

# EQA02: VISIT PLANNING

## REJECTING AN ACTIVITY

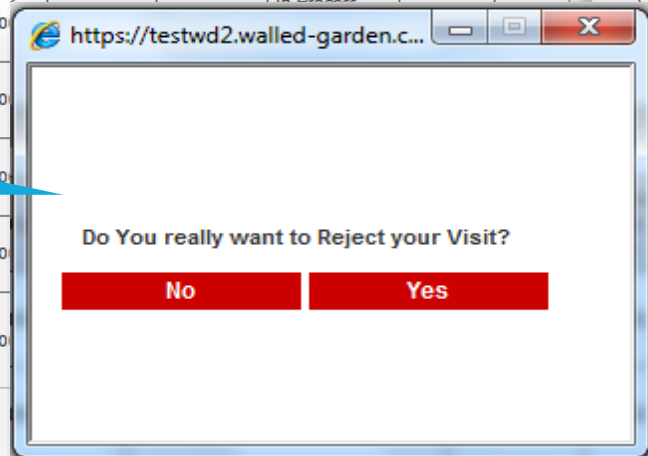
Only reject an activity where you do not want to be allocated to the centre or carry out the activity.

In the case of duplicate activities, no learners or the wrong time of year for example, please contact the quality team, rather than reject the activity. The quality team will then either re-arrange or cancel the activity.

1 Click here to reject the activity

Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs						
06.2013	11.06.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>						
03.2013	01.03.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>						
01.04.2013	01.04.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.05.2013	01.05.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	8000044001	Exam Audit	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000					
<input type="checkbox"/>	<input type="checkbox"/>	8000044000	Sys				1.04.2013	00.00.0000					
<input type="checkbox"/>	<input type="checkbox"/>	8000043999	Sys (ha					00.00.0000					
<input type="checkbox"/>	<input type="checkbox"/>	8000043839	40002306 Remote QAP 0059-21	064190	East Surrey College	01.01.2013	01.01.2013	00.00.0000					
<input type="checkbox"/>	<input type="checkbox"/>	8000043838	40002305 QAP Visit 0666-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	00.00.0000					

2 Click Yes to reject the visit. You will not see it your activities the next time you log in.



# EQA02: VISIT PLANNING

## ADDING NOTES

Plan Visit	Consultant Note	Transaction	My Activity Type	Planned	Planned	Actual	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs	
■	■	8000044009	Modera 3748-01, 4222-21				00.00.0000	8	In Process with Consultant/EV	■	■	
■	■	8000044007	Half day Sampli Visit 3748-01, 4222-21				00.00.0000	4	In Process with Consultant/EV	■	■	
■	■	8000044005	Remote Sampli 3748-01, 4222-21				00.00.0000	4	In Process with Consultant/EV	■	■	
■	■	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey Colleg	01.05.2013	01.05.2013	00.00.0000	8	In Process with Consultant/EV	■	■
■	■	8000044001	Exam Audit 3692	064190	East Surrey Colleg			00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000044000	Systems Visit	064190	East Surrey Colleg			00.00.0000	8	In Process with Consultant/EV	■	■
■				064190	East Surrey Colleg							
■	■	8000043838	40002305 QAP Visit 0688-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	00.00.0000	00.00.0000			
■	■	8000002020	Sampling 4222-21 3748-01	064190	East Surrey College	04.02.2013	04.02.2013	25.02.2013	25.02.2013			

**Consultant Note**

Spoke to Centre contact to arrange a visit. Will call me back next week.

Cancel Save Changes

Message from webpage

EV Note Updated.

OK

1

2

3

4

Click again at a later date to view previously entered notes.

You have the facility to make your own notes against each activity. Do not record any actions or notes for the Centres. The **QUALITY TEAMS** however will be able to access these. Please remember to add the date of your entry and your name

# EQA02: VISIT PLANNING

## ADDING ATTACHMENTS

Activity Details

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs
■	■	8000044000	External QA Moderation	064190	East Surrey College	11.08.2013	11.08.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■
■	■							00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■							00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■							00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■
■	■	8000044001	Exam Audit 3692	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000044000	Systems Visit	064190	East Surrey College	11.04.2013	11.04.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■
■	■		Systems Visit		East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■				East Surrey College	01.01.2013	01.01.2013	00.00.0000	00.00.0000				
■	■	8000043838	40002305 QAP Visit 0666-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	00.00.0000	00.00.0000				
■	■	8000002020	Sampling 4222-21 3748-01	064190	East Surrey College	04.02.2013	04.02.2013	25.02.2013	25.02.2013				

**File upload**

Please select the file you wish to upload:

**Browse** **Upload**

Existing Documents

No documents available

Here you can view previously attached documents.

Use this facility to attach any document relevant to the visit. For example, you can attach a CA2 sent by a centre that does not yet have access to the Walled Garden.

# EQA02: VISIT PLANNING

## VIEWING A CA2 (1/4)

To view the CA2 submitted by the centre when they are using the system:

Activity Details												
Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Status	Reject Visit	Attach Docs
■	■	8000000462	40000181 Centre/Qual App 0666-01	058796	AP2 Training Centre	30.08.2012	30.08.2012	30.08.2012	30.08.2012	Consultant/EV Report Submitted	■	■
■	■	8000000488	Sampling Visit 0666-01	058796	AP2 Training Centre	30.08.2012	30.08.2012	00.00.0000	00.00.0000	In Process with Consultant/EV	■	■
■	■	8000000490	Sampling Visit 0666-01	058796	AP2 Training Centre	30.08.2012	30.08.2012	31.08.2012	31.08.2012	Visit Scheduled	■	■
■	■	8000000494	Sampling Visit 0666-01	058796	AP2 Training Centre	30.08.2012	30.08.2012	31.08.2012	31.08.2012	CA1 sent to Customer	■	■
■	■	② 8000000496	Sampling Visit 0666-01	058796	AP2 Training Centre	30.08.2012	30.08.2012	31.08.2012	31.08.2012	CA2 Received	■	■
■	■	8000000498	Annual Systems Visit	058796	AP2 Training Centre	30.08.2012	30.08.2012	00.00.0000	00.00.0000	In Process with Consultant/EV	■	■

① The activity has to be at status CA2 Received

② Click on the 800..... transaction number

# EQA02: VISIT PLANNING

## VIEWING A CA2 (2/4)

Home Catalogue/Shop Quality  
Quality System | Online Forms | QMS CGLI

Click to hide search fields and maximise the width of the screen

1 Please select the form you require from the list below and then click on the action you wish to perform.

2 Please choose Sampling Form CA2

3 Centre 040307 West Cheshire College

Reference No. 8000045357

4 Display

Search

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

Show me: My Activities

For Centre: All my Centres

For Awarding org:

For Status: All Statuses

For period\*: last year

Or From\*: To:

Search

Online Forms

### Online Forms

Online Forms allows you to view and submit a range of forms, including qualification approval applications (QAP) and centre updates (CU).

The Centre Activity Report (CAR) is the report form that is used by your Quality Consultant, Systems Consultant or Examinations Auditor. Unlike previous single form reports, the CAR has been split into several different forms. The CAR you will see during and after an external quality assurance activity will depend on the nature of the quality assurance activity undertaken.

Please see below for a description of each:

Centre Activity Report 1 - is used for

- exam audits

Centre Activity Report 2 - is used for

- senior / professional recognition award monitoring activity

Centre Activity Report 3 - is used for

- external quality assurance sampling / moderation activity
- external quality assurance sampling / moderation activity-remote

Centre Activity Report 4 - is used for

- systems visit
- systems advisory activity

- 1 Online Forms will open on the right-hand side of the screen
- 2 Select **Sampling Form CA2** from the dropdown menu
- 3 The **centre** and **Reference No** will be pre-populated
- 4 Click on **Display**

# EQA02: VISIT PLANNING

## VIEWING A CA2 (3/4)

The centre may attach their own database. However they will still need to submit the CA2 with the file attached.

Home Quality 1  
Quality System | Online Forms History Back

### Centre tracking of assessment and quality assurance

Wherever possible, please complete and distribute this form electronically to avoid unnecessary printing

Centre no , ID:

Contact name:

Centre name:

Service Order:

Date of City & Guilds QC , ESC\* activity:

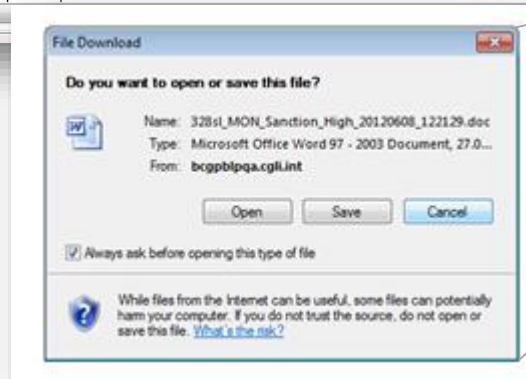
\*Qualification Consultant , Employer Systems Consultant

Please forward the following information:

Select	Document Type	Attachment
<input type="checkbox"/>	Copies of the tracking plan/internal quality assurance sampling plan for the qualification(s) listed.	328sl_MON_Sanction <span style="float: right;">View File</span>
<input type="checkbox"/>	Please tick if you use e-portfolios for these qualifications, and which portfolio do you use? Please mention in the next column.	

2

- |   |   |
|---|---|
| 1 | The completed CA2 will display.                           |
| 2 | To view any documents attached to the CA2 click view file |





# EQA02: VISIT PLANNING

## VIEWING A CA2 (4/4)

Additional Attachments	
CA2Testing80000580503748-01Download_20151020_115312.xlsx	<a href="#">View File</a>
CA2Testing80000580503748-02Download_20151020_115318.xlsx	<a href="#">View File</a>
CA2Testing80000580503748-03Download_20151020_115328.xlsx	<a href="#">View File</a>
CA2Testing80000580543847-23Download_20151020_115334.xlsx	<a href="#">View File</a>
No files attached	

The qualification(s) being sampled will be listed on the CA2,

Only use the following table(s) if you have not attached a list of your learners.

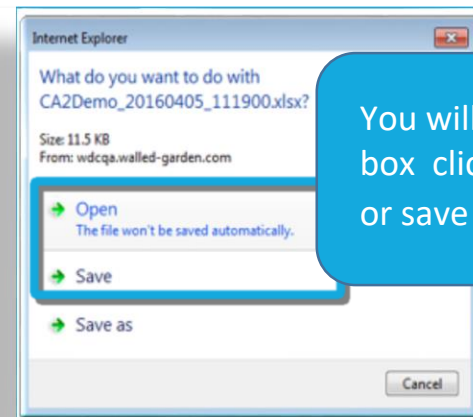
Please complete all columns for the relevant learners. There will be one table per qualification number

Qualification no	Qualification title	Download Enrolments	Attach Enrolments
3847-03	English Skills - Themed English Awards	<a href="#">Extract</a>	CA2Testing80000580603847-03Download_20151020_115802.xlsx <a href="#">View File</a>
3847-23	Maths Skills - Themed Mathematics Awards	<a href="#">Extract</a>	CA2Testing80000580603847-23Download_20151020_115811.xlsx <a href="#">View File</a>

[Print](#)

You have the option to print the CA2

To view the centre information click on the files



You will see a pop up box click open to view or save to download

# EQA02: VISIT PLANNING

## CREATING A PA1 (1/11)

Once the Centre have returned the CA2 you can create the PA1

### Activity Details

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit	Attach Docs
■	■	8000044014	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	8	In Process with Consultant	■	■
■	■	8000044011	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	8	CA2 Received	■	■
■	■	8000044009	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■
■	■	8000044007	Half day Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.03.2013	01.03.2013	24.06.2013	24.06.2013	4	CA1 sent to Customer	■	■
■	■	8000044005	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.05.2013	01.05.2013	27.06.2013	27.06.2013	8	Visit Scheduled	■	■
■	■	8000044001	Exam Audit 3692	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000044000	System Visit	064190	East Surrey College	11.01.2013	11.01.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■

1

Locate your activity. The status has to be 'CA2 Received'.

2

Click on the Transaction number (800). This will open Online Forms on the right-hand side of the screen.

The PA1 will be populated from the CA2.

If the Centre attached their own list of learners, you will need to populate the PA1 with learner details for your sample.

# EQA02: VISIT PLANNING

## CREATING A PA1 (2/11)

Click to hide search fields and maximise the width of the screen

1

2

3

4

Search

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

Show me:

For Centre:

For Awarding org:

For Status:

For period \*  last year

Or From \*  To

Please select the form you require from the list below and then click on the action you wish to perform.

Please choose:

Centre:

Reference No.:

### Online Forms

Online Forms allows you to view and submit a range of forms, including qualification approval applications (QAP) and centre updates (CU).

The Centre Activity Report (CAR) is the report form that is used by your Quality Consultant, Systems Consultant or Examinations Auditor. Unlike previous single form reports, the CAR has been split into several different forms. The CAR you will see during and after an external quality assurance activity will depend on the nature of the quality assurance activity undertaken.

Please see below for a description of each:

- Centre Activity Report 1** - is used for
  - exam audits
- Centre Activity Report 2** - is used for
  - senior / professional recognition award monitoring activity
- Centre Activity Report 3** - is used for
  - external quality assurance sampling / moderation activity
  - external quality assurance sampling / moderation activity-remote
- Centre Activity Report 4** - is used for
  - systems visit
  - systems advisory activity
- Centre Activity Report 5** - is used for

1 Online Forms will open on the right-hand side of the screen

2 Select **Sampling Form PA1** from the dropdown menu

3 The **centre** and **Reference No** will be pre-populated

4 Click on **Create**



Home Catalogue/Shop **Quality**  
Quality System | Online Forms | QMS CGLI

History Back Forward

### Form PA1

City & Guilds ilm

#### Plan of \*QC , ESC activity

1. **To:**

Contact name: Carolynne Winchester

Centre no , ID: 064450

Service Order: 8000043459

**Position: Quality Assurance Co-ordinator**

Centre name: Guildford College

Site , address: Stoke Park Campus  
Guildford  
GU1 1EZ  
United Kingdom

2. **From: Qualification Consultant / External Verifier, Employer Systems Consultant**

QC , ESC name: John Lyons

Telephone:

3. **Type of activity: Qualification Sampling Activity**

Date of activity: 25.11.2013

Start time: (24 hour clock) 09:00:00

**Save**

A pre-populated PA1 will display.

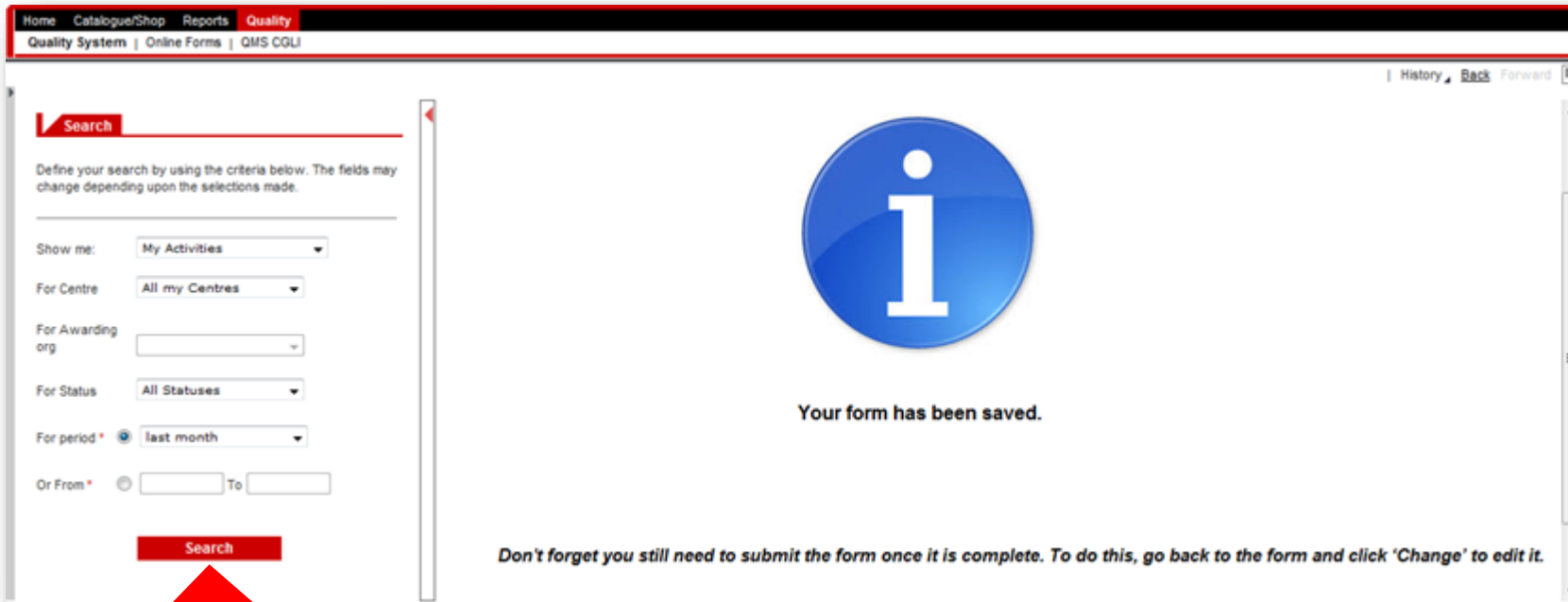
As you progress through the form, use the floating Save button.

**SAVE  
REGULARLY  
TO AVOID  
LOSING  
DATA**

# EQA02: VISIT PLANNING

## CREATING A PA1 (4/11)

Every time you press the Save button, you should see this message to confirm that the form has been saved successfully.



The screenshot shows a web application interface. On the left, there is a search panel with the following fields:

- Show me: My Activities
- For Centre: All my Centres
- For Awarding org: [empty]
- For Status: All Statuses
- For period: last month
- Or From: [empty] To: [empty]

Below these fields is a red 'Search' button. On the right side of the main content area, there is a large blue circular icon with a white lowercase 'i' inside. Below the icon, the text reads: 'Your form has been saved.' At the bottom of this area, there is a note: 'Don't forget you still need to submit the form once it is complete. To do this, go back to the form and click 'Change' to edit it.'

Click 'Search' to go back to your list of activities.  
Re-open the form in '**Change**' mode to continue working on it.

# EQA02: VISIT PLANNING

## CREATING A PA1 (5/11)

### 3. Type of activity: Qualification Sampling Activity

Date of activity:

Start time: (24 hour clock)

Date of previous activity:

#### Qualifications to be sampled:

Qualification no	Qualification title	Total number of registered learners in the last 12 months
3748-01	Functional Skills English	366
4222-21	Level 2 Diploma in Health and Social Car	3

### 4. Outline plan for the activity

I would like to draw your attention to the previous report dated and the action plan that was required, as this will form a particular focus during my visit (left blank if no action plan was required).

Date of last report

Outline agenda for the activity, including details of any sites to be visited, telephone calls and approximate timings:

Delete?	Time(am) (hh:mm)	Activity	Time(pm) (hh:mm)
<input type="checkbox"/>			

Add New

Delete

### 5. Centre staff I would like to meet during the visit or contact during the remote activity

Please also ensure that all applicable staff are aware of the nature and requirements for my visit or activity.

Delete?	Name(list any additional staff in the comments section)	Position
<input type="checkbox"/>		

save

The PA1 will be populated with the number of registered learners for each qualification you are planning to sample.

# EQA02: VISIT PLANNING

## CREATING A PA1 (6/11) Using the Learner Search Facility

### 6. Qualification(s)/learners sampling plan

Please arrange for the following, candidates and evidence to be made available. Please note that a random sample may also be included during qualification sampling visits.

Note: This evidence must be sent to me by the date shown if this is a remote sampling activity (see section 3).

Save

Delete?	Sample Learner	Learner enrolment number	Learner name	Qualification no	Qualification level	Qualification Unit	Evidence type(s)	Assessor name	IQA staff name	Assessment site name/address	City & Guilds registration date (dd.mm.yyyy)
<input type="checkbox"/>	<input type="checkbox"/>		<input type="text" value="Search"/>				Please select				

Add New Delete

To populate the learner field click on the Search button

### 7. Please arrange for me to observe the following quality assurance activity:

Delete?	Programme coordinator/Internal Quality Assurer	Assessor (if applicable)	Assessment site	Activity
<input type="checkbox"/>			Please select	

Add New Delete

### 8. Additional comments/qualifications/staff/observation of IQA

practice requirements:

Please contact me if you have any queries regarding the plans for this activity

Submitted date

Save Submit Print

# EQA02: VISIT PLANNING

## CREATING A PA1 (7/11) Using the Learner Search Facility

The screenshot shows a web application interface for creating a PA1. A dialog box titled "Enrolment Search" is open, allowing users to search for qualifications. The dialog has four numbered callouts: 1 points to the "Enrolment Number" input field, 2 points to the "Full Name" input field, 3 points to the "Search" button, and 4 points to the "Qualification code" dropdown menu. The dropdown menu is open, showing a list of qualification codes from 3692-01 to 3692-25, with 3692-12 selected. A red "save" button is visible on the left side of the main interface.

Below the dialog box, a table is visible with the following structure:

Evidence type(s)	Assessor name	IQA staff name	Assessment site name/address	City & Guilds registration date (dd.mm.yyyy)
Please select				

Below the table, there are two more input fields:

Assessment site	Activity

You can search using various options:

1. Enter an enrolment number and click search
2. Enter a full learner name and click search
3. Use a wild card (\*) in either field and click search
4. Select the qualification only from the drop down and click search



# EQA02: VISIT PLANNING

## CREATING A PA1 (8/11) Using the Learner Search Facility

6. Qualification(s)/learners sampling plan

Please arrange for random sample m

Note: This evidenc

**save**

Enrolment Search

Enrolment Number

Full Name

Qualification code

**Search**

Select	Enrolment Number	Full Name
<input type="radio"/>	AJ02067	Names will appear in this column
<input type="radio"/>	AJ02080	
<input type="radio"/>	AJ02116	
<input type="radio"/>	AJ02153	
<input type="radio"/>	AJ02190	
<input type="radio"/>	PPZ9666	
<input type="radio"/>	TCF0677	
<input type="radio"/>	WGW9358	
<input type="radio"/>	YBD6223	
<input type="radio"/>	YCR6499	
<input type="radio"/>	YCR8494	

7. Please arrange for

8. Additional comm

practice requirem

Please contact me

Submitted date

**save**

Assessor name	IQA staff name	Assessment site name/address	City & Guilds registration date (dd.mm.yyyy)

Activity

- If the qualification does have learners registered you will see them listed
- To populate the PA1 click on the **Select** button



# EQA02: VISIT PLANNING

## CREATING A PA1 (10/11)

7. Please arrange for me to observe the following quality assurance activity:

Delete?	Programme coordinator/Internal Quality Assurer	Assessor (if applicable)	Assessment site	Activity
<input type="checkbox"/>			Please select	

8. Additional comments/qualifications/staff/observation of IQA practice requirements:

Please contact me if you have any queries regarding the plans for this activity

Submitted date

Populate with the date you submit the PA1

Once complete click **Submit**

3. Type of activity: Qualification Sampling Activity

Telephone:

Date of activity: 28.06.2013

Start time: (24 hour clock) 00:00:01

Date of previous activity: Please enter valid date (DD.MM.YYYY) 02.02.12

Qualifications to be sampled:

If the PA1 has not been submitted successfully you will see errors flagged in red. Correct the errors, re-save the form and try to submit again.

# EQA02: VISIT PLANNING

## CREATING A PA1 (11/11)

If the PA1 has been submitted successfully this message will appear

The screenshot shows a web application interface. On the left is a search sidebar with various filters. The main content area displays a large green checkmark icon and the text 'Your form has been submitted'. Below this, a blue box highlights the 'What happens next' section, which contains the text: 'The planning process for this activity is complete. You can now start to work on your Centre Activity Report (CAR)'. A blue speech bubble points to the checkmark icon with the text 'This message will let you know the next step'.

Click 'Search' to go back to your list of activities.  
Re-open the form in 'Display' mode to view/print it.

# EQA02: VISIT PLANNING

## PRINTING/SAVING A SUBMITTED PA1

If your centre does not have access to the system yet, you will need to save a copy of a the submitted PA1 form and email it to them. Follow the steps below.

Please choose

Centre

Reference No.

1. Once complete click **Save and Submit**

7. Please arrange for me to observe the following quality assurance activity:

Delete?	Programme coordinator/Internal Quality Assurer	Assessor (if applicable)	Assessment site
<input type="checkbox"/>			Please select

8. Additional comments/qualifications/staff/observation of IQA practice requirements:

Please contact me if you have any queries regarding the plans for

Submitted date

2. Scroll down and click **Print**. Select **XPS or Adobe PDF** from the list of printers. Further details can be found in the FAQs

# **EQA03**

# **CAR (SAMPLING)**

**How to create your Centre Activity Report (CAR) for Sampling Activities**

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (1/9)

Once you have submitted the PA1, you can create the CAR.

Home Catalogue/Shop Reports **Quality**  
Quality System | Online Forms | QMS CGLI

**Search**

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

Show me:

For Centre:

For Awarding org:

For Status:

For period \*  last week

Or From \*  01.01.2013 To 20.06.2013

**Search**

Activity Details

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit
■	■	8000044014	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	8	In Process with Consultant	■
■	■	8000044011	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	8	PA1 sent to Customer	■
■	■	8000044009	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■
■	■	8000044007	Half day Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.03.2013	01.03.2013	24.06.2013	24.06.2013	4	CA1 sent to Customer	■
■	■	8000044005	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■

- 1 Locate your activity. The status has to be 'PA1 sent to customer'.
- 2 Click on the Transaction number (800). This will open Online Forms on the right-hand side of the screen.

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (2/9)

Home Catalogue/Shop Quality  
Quality System | Online Forms | QMS CGL

Click to hide search fields and maximise the width of the screen

History Back Forward

Search

Please select the form you require from the list below, and then click on the action you wish to perform.

Please choose Centre Activity Report 3

Centre 040307 West Cheshire College

Reference No. 8000045357

Create Change Display

Online Forms

**Online Forms**

Online Forms allows you to view and submit a range of forms, including qualification approval applications (QAP) and centre updates (CU).

The Centre Activity Report (CAR) is the report form that is used by your Quality Consultant, Systems Consultant or Examinations Auditor. Unlike previous single form reports, the CAR has been split into several different forms. The CAR you will see during and after an external quality assurance activity will depend on the nature of the quality assurance activity undertaken.

Please see below for a description of each:

Centre Activity Report 1 - is used for

- exam audits

Centre Activity Report 2 - is used for

- senior / professional recognition award monitoring activity

Centre Activity Report 3 - is used for

- external quality assurance sampling / moderation activity
- external quality assurance sampling / moderation activity-remote

Centre Activity Report 4 - is used for

- systems visit
- systems advisory activity

1	Online Forms will open on the right-hand side of the screen
2	Select <b>Centre Activity Report 3</b> (sampling) from the dropdown
3	The <b>centre</b> and <b>Reference No</b> will be pre-populated
4	Click on <b>Create</b>



# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (3/9)

**Centre Activity Report** City & Guilds ilm

External Quality Assurance Sampling Visit

**Section 1 Contact details**

1.1 Transaction number	8000044763
1.2 Centre Name	Swindon College
1.3 Centre number	066543
1.4 Centre contact	
Title	
First name	Matthew
Surname	Musella
Telephone number*	
Email address*	matthewmusella@swindon-college.ac.uk
Consultant Name	Derek Crawley
Type of Activity	External QA Sampling Visit
Date of Activity (dd.mm.yyyy)	04.10.2013
Start Time (24 hrs clock)	00:00:01
Finish Time (24 hrs clock)	
Location of activity	Please select

**Annotations:**

- save** (floating button)
- The report will be prepopulated with the centre details and the information from the PA1
- Enter activity start and finish time.
- Select the location of activity from the drop down box.

**Location of activity dropdown menu:**

- Please select
- Please select
- Centre
- Remote
- Assessment site
- Centre including visit to assessment site

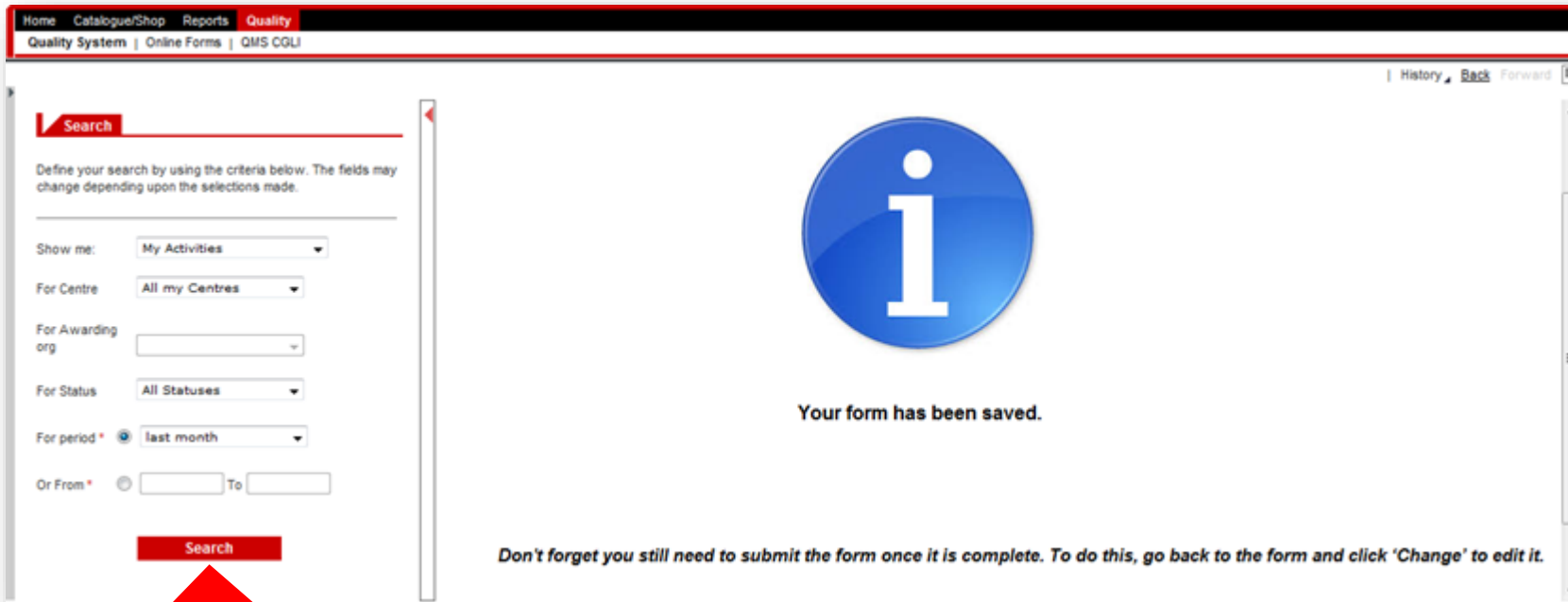
As you progress through the form, use the floating Save button.

**SAVE REGULARLY TO AVOID LOSING DATA**

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (4/9)

Every time you press the Save button, you should see this message to confirm that the form has been saved successfully.



The screenshot shows a web application interface. On the left, there is a search panel with the following fields:

- Show me: My Activities (dropdown)
- For Centre: All my Centres (dropdown)
- For Awarding org: (empty dropdown)
- For Status: All Statuses (dropdown)
- For period: last month (dropdown)
- Or From: (radio button) [ ] To: [ ]

Below these fields is a red 'Search' button. On the right side of the main content area, there is a large blue circular icon with a white lowercase 'i' inside. Below the icon, the text reads: "Your form has been saved." At the bottom of this area, there is a note: "Don't forget you still need to submit the form once it is complete. To do this, go back to the form and click 'Change' to edit it."

Click 'Search' to go back to your list of activities.  
Re-open the form in '**Change**' mode to continue working on it.

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (5/9)

### Section 2 Summary of activity & centre staff met

2.1 General comments regarding the day including good practice. For a support visit outline advice, guidance & training provided

Enter comments.

2.2 Centre staff met

Identify staff members you would like to meet.

Delete?	Staff Name	Role	Met
<input type="checkbox"/>			<input type="radio"/> Yes <input checked="" type="radio"/> No

Add New

Delete

Has the previous action plan been met by the centre?

Please select

Comments

Select your answer from the dropdown menu and enter your comments. See further information on the Action/Improvement Plan section.

Please select  
Yes  
No  
N/A

Save

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (6/9)

This is your recommended qualification monitoring rating (low, medium, high)

### Section 3 Qualification related information

#### 3.1 Qualifications sampled/advised

Delete?	Qualification number	Qualification title	Number of active registered learners	Number of certificated learners from last 12 months	Prior qualification approval status	New qualification approval status
<input type="checkbox"/>	3172-01	NVQ in Health and Social C	100	25	Low (Full Approval)	Please select

**Add New** **Delete**

- Please select
- Low (Full Approval)
- Medium (Registration Only)
- High (No Registration or Certification)

#### 3.2 Checklist

If the answer is 'no' please explain

Quality Assurance Requirement	Finding	Comments
Is the Staff Matrix up-to-date?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Staff Matrix up to date and available for this activity.
Are all current staff approved, and hold the relevant recognised qualifications?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Peter Positive is working towards TAQA IQA award. Completion date expected to be September 2013.
Is the centre registered for and receiving the monthly mailings?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Centre confirmed they receive alerts and updates
Does centre access centre section of website - to obtain latest guidance and updates?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Centre confirmed they have access
Are learners development needs matched against the requirements of the qualification(s) and an agreed individual assessment plan established?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Do learners have regular opportunities to review their progress and goals?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Do learners have regular opportunities to revise their assessment plan accordingly?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are particular assessment requirements of learners identified and met where possible?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Were any assessments completed in Welsh? If so, please provide further details in section 2.1	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Answer Yes or No to the questions in this checklist. Add comments into the comment box. It is good practice to always add comments, regardless of whether the answer is Yes or No.

Save

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (7/9)

Enter details of each learner sampled. Complete one row per learner.

At the end of each row you have the option to 'Hide or Show' your comments of your sample

### 3.3 Sampling Pages

Delete?	Learner name and Reg. number	Reg. and Cert date	Qual. and Unit (s) sampled	Assessor name	Type of assessment and Date of Assessment (dd.mm.yyyy)	Do you agree with the Assessor finding?	Internal Quality Assurer (IQA) name	Internal quality assurance activity and date	Do you agree with Internal Quality Assurer finding?	Hide All
<input type="checkbox"/>	Fred Smith ABC1234	01.06.2013	7000-01 101, 102	Peter Positive	Observation 01.07.2013	Yes	Gloria Smyth	Interim 01.09.2013	Yes	Hide
Individual feedback on the evidence sampled										
<input type="checkbox"/>	John Adams GHY4587	01.07.2013	3172-01 101, 102	Peter Positive	Observation 01.07.2013	Yes	Gloria Smyth	Interim 01.09.2013	Yes	Hide
Individual feedback on the evidence sampled										
<input type="checkbox"/>					Please select Please select	Please select Please select		Please select Please select	Please select Please select	Hide
					Assignments	Yes		Interim	Yes	
					Case Studies	No		Final	No	
					Observation	N/A			N/A	
					Observation of Assesmer					
					Peer Feedback					
					Portfolio					
					Products					
					Products of Work					
					Professional Discussion					
					Projects					
					Q&A					
					Recognition of Prior Learning					
					Reflective Accounts					
					Witness Testimony					
					Other (Please state in det					

Save

Enter individual comments on each learner sampled.

Select from each of the drop down box where applicable.

Learners you selected in the PA1 will be pre-populated. You can add more learners manually with the 'Add New' button.

Enter general comments on the sampling activity.

**REMEMBER: Save your report regularly.**

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (8/9)

If the answer is 'no' please explain

Quality Assurance Requirement	Finding	Comments
Have all programme operations been complied with?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Is the assessment strategy complied with?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Does IQA sampling cover the full range of options (CAMERA) with activities planned for the appropriate time?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Have all assessments been sampled as planned?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Do IQA staff facilitate regular standardisation activities?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Do IQA staff give appropriate feedback to assessors regarding their assessment decisions?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Do IQA staff maintain appropriate sampling plans in line with CAMERA?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are records of IQA activity maintained and made available in line with City & Guilds requirements / ILM?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Do all claims for certificates meet the necessary requirements?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Are there any other risks concerning IQA activity?	<input type="radio"/> Yes <input checked="" type="radio"/> No	

save

Answer Yes or No to the questions in this checklist. Add comments.

### Section 4 Action, Improvement Plan

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point	Level of risk	By whom	By when (dd.mm.yyyy)	Date completed (dd.mm.yyyy)	* To be checked by (mandatory field)
<input type="checkbox"/>			Please select High Medium Low Improvement				

Add New Delete

Save Submit Print Upload Download

Once the CAR is complete, click **Submit**.

Any Actions must be clearly referenced to 'Our Quality Assurance Requirements' or the 'City & Guilds Centre Manual'

Select a risk or improvement for each action  
The 'To be checked by' field is a mandatory field

# EQA03: CAR (SAMPLING)

## SUBMITTING A CAR (9/9)

If the CAR has been submitted successfully this message will appear.

The screenshot shows the 'Quality System' interface. The top navigation bar includes 'Home', 'Catalogue/Shop', 'Reports', and 'Quality'. Below this, there are links for 'Quality System', 'Online Forms', and 'QMS CGLI'. On the right side, there are links for 'History', 'Back', and 'Forward'. The main content area features a large green checkmark icon and the text 'Your form has been submitted'. To the left, there is a search filter section with various dropdown menus and a 'Search' button. A blue callout box points to the confirmation message, and another blue callout box points to the 'Search' button.

Search

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

Show me:

For Centre:

For Awarding org:

For Status:

For period \*  last month

Or From \*  To

Search

History [Back](#) [Forward](#)

**Your form has been submitted**

This message will let you know the next step

**What happens next**

*Your managing office/quality manager will process your report. Please submit your expenses now.*

Click 'Search' to go back to your list of activities.  
Re-open the form in 'Display' mode to view/print/amend it.

# EQA03: CAR (SAMPLING)

## PROCESSING CAR AFTER SUBMISSION (1/2)

Once you submit the CAR, the status of the activity will change to **CAR Report Submitted** as shown below. This means:

- The report can still be amended by you or the Managing Quality Office.
- The Managing Quality Teams will review the report, and they may wish to make changes to the content. They may ask you to review the report and enter additional information if necessary. To do this, open the form in **Display** mode, **make the necessary changes** and click **Save**.
- The Centre cannot see the report in the Walled Garden at this stage. You should not email them a copy – The Managing Quality Teams will do so once the report is fully processed (see next page).

Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | QMS CGLI

History [Back](#) Forward

**Search**

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

Show me:

For Centre:

For Awarding org:

For Status:

For period \*  last week

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit
■	■	8000044014	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■
■	■	8000044011	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	Full Day	CAR Report Submitted	■
■	■	8000044009	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■



# EQA03: CAR (SAMPLING)

## PROCESSING CAR AFTER SUBMISSION (2/2)

Once the Managing Quality Teams have finished processing the report, the status of the activity will change to **CAR Report Completed** as shown below. This means:

- The report can no longer be changed (with the exception of the completion date in the Action/Improvement Plan, as shown on the next page)
- The Centre can view the report in the Walled Garden. If they don't have access yet, the Managing Local Office will email them a copy of the report.

Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | QMS CGLI

History [Back](#) [Forward](#)

### Search

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

Show me:

For Centre:

For Awarding org:

For Status:

For period:

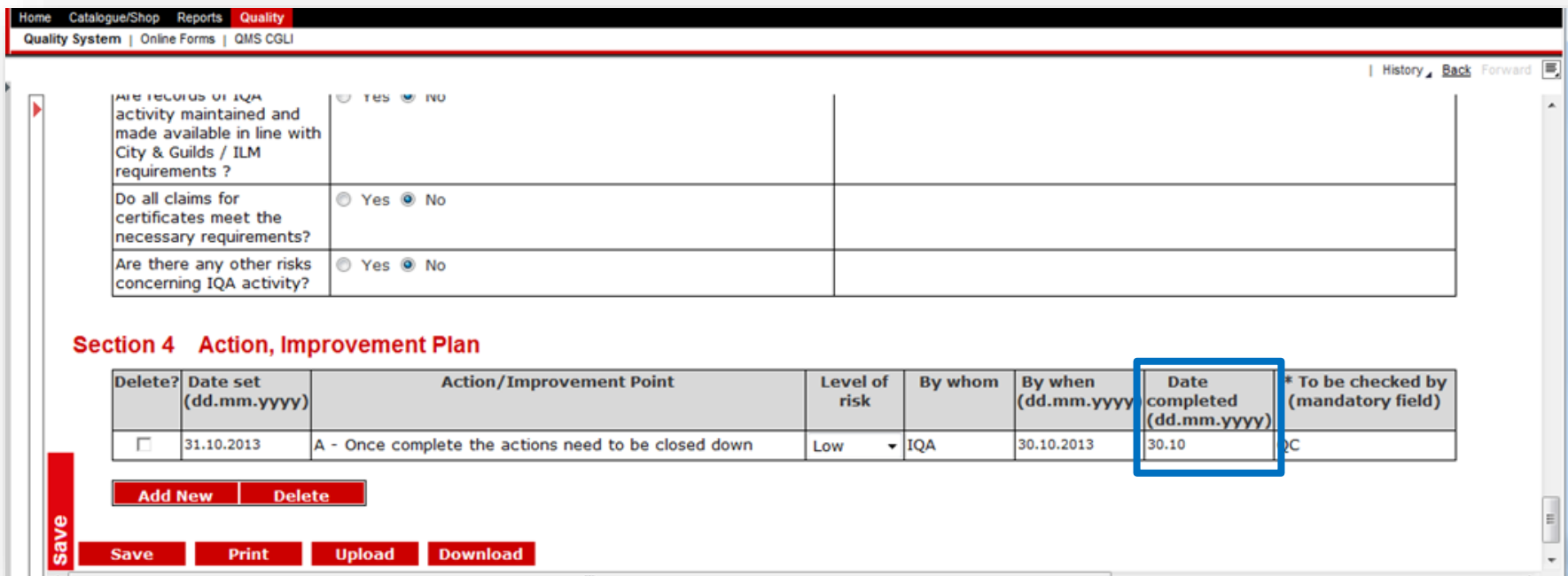
### Activity Details

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit
■	■	8000044014	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■
■	■	8000044011	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	Full Day	CAR Report Completed	■
■	■	8000044009	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■

## ACTION / IMPROVEMENT PLAN COMPLETION

You can close an action on the CAR at any time after it has been processed. To do this:

- Find the activity in **My Activities**.
- Click on the Transaction number (800) and open the form in **Display** mode.
- Populate the **Date completed**.
- Click **Save**



The screenshot shows a web application interface for the Quality System. At the top, there are navigation links: Home, Catalogue/Shop, Reports, and Quality. Below this, the page title is "Quality System | Online Forms | QMS CGLI".

The main content area contains a form with three rows of questions, each with radio button options for "Yes" and "No":

- Are records of IQA activity maintained and made available in line with City & Guilds / ILM requirements? (Yes/No)
- Do all claims for certificates meet the necessary requirements? (Yes/No)
- Are there any other risks concerning IQA activity? (Yes/No)

Below the form is a section titled "Section 4 Action, Improvement Plan". It contains a table with the following columns: Delete?, Date set (dd.mm.yyyy), Action/Improvement Point, Level of risk, By whom, By when (dd.mm.yyyy), Date completed (dd.mm.yyyy), and \* To be checked by (mandatory field).

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point	Level of risk	By whom	By when (dd.mm.yyyy)	Date completed (dd.mm.yyyy)	* To be checked by (mandatory field)
<input type="checkbox"/>	31.10.2013	A - Once complete the actions need to be closed down	Low	IQA	30.10.2013	30.10	QC

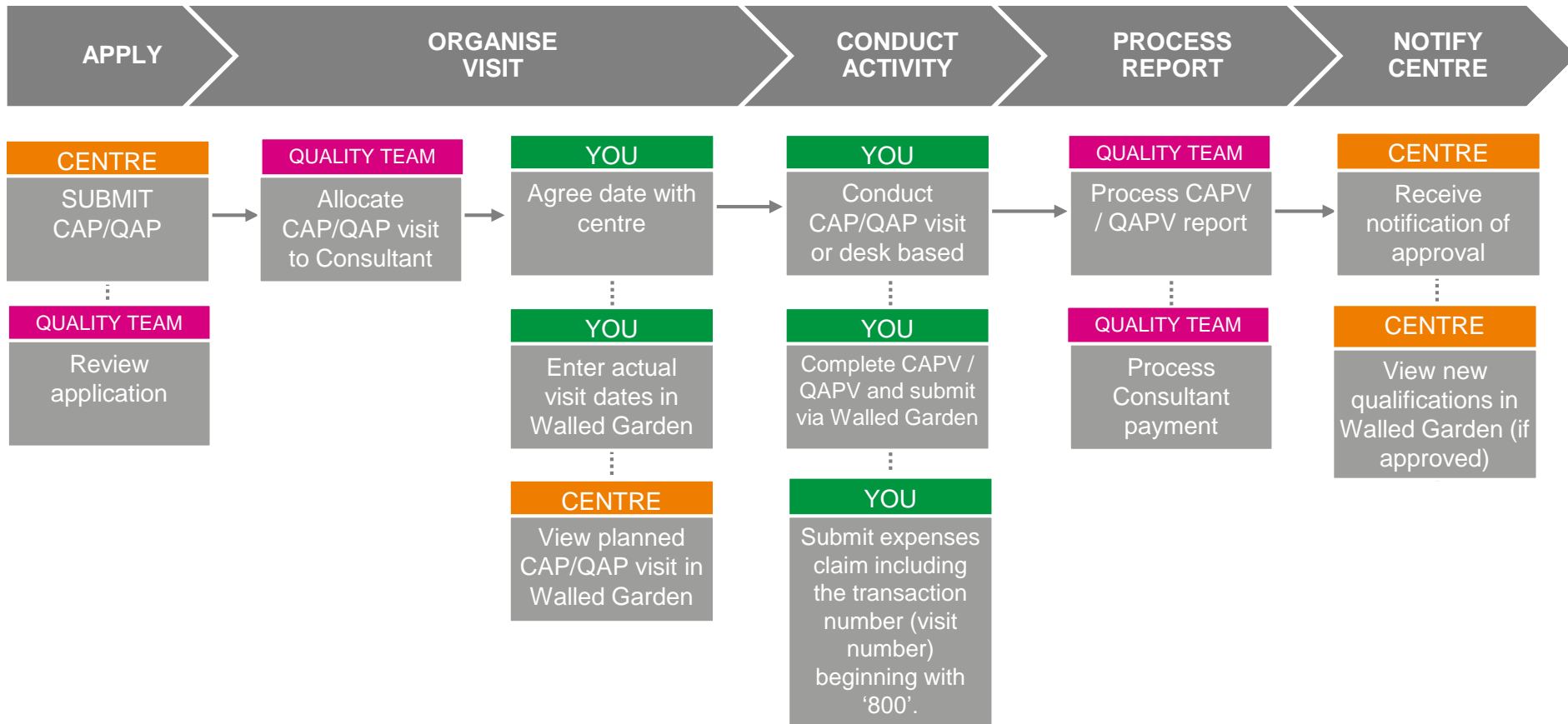
Below the table are two buttons: "Add New" and "Delete". At the bottom of the page, there is a vertical "Save" button on the left and four horizontal buttons: "Save", "Print", "Upload", and "Download".

**EQA04**

**QAP PROCESS**

# EQA04: QAP PROCESS

## PROCESS OVERVIEW



### ACTIVITY STATUS IN THE Walled Garden

**CONSULTANT / EV  
ASSIGNED**

**VISIT SCHEDULED**

**CONSULTANT / EV REPORT SUBMITTED**

# EQA04: QAP PROCESS

## VIEW THE CENTRE-SUBMITTED QAP (1/2)

Quality System | Online Forms | QMS CGLI

History Back Forward

Search

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

---

Show me: My Activities

For Centre: All my Centres

For Awarding org: 1000 City & Guilds

For Status: All Statuses

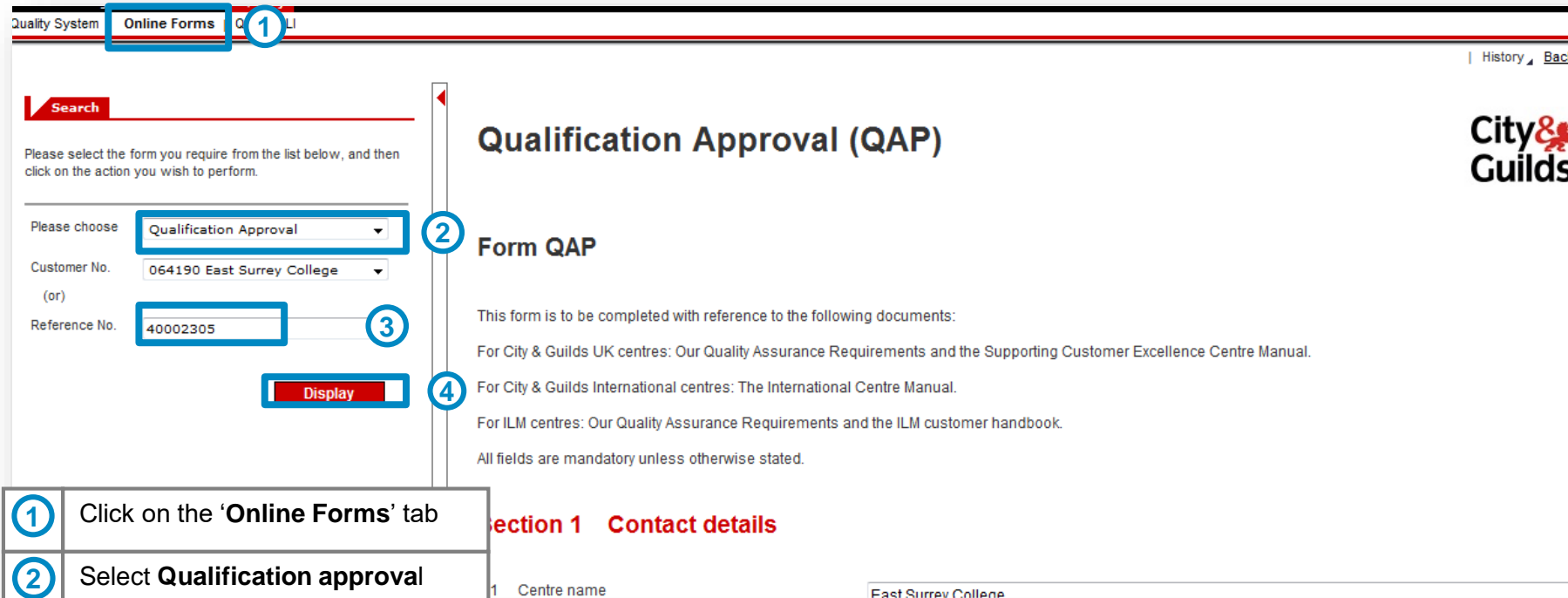
For period \*  last year

Or From \*  To

Search

		8000044005	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	28.06.2013	28.06.2013	4	Received		
		8000044003	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.05.2013	01.05.2013	27.06.2013	27.06.2013	8	CAR Report Submitted		
		8000044001	Exam Audit 3692	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV		
		8000044000	Systems Visit	064190	East Surrey College	11.04.2013	11.04.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV		
		8000043999	Systems Visit (half day)	064190	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV		
		8000043839	Remote QAP 0059	064190	East Surrey College	01.01.2013	01.01.2013	00.00.0000	00.00.0000	4	Consultant/EV Assigned		
		8000043838	40002306	064190	East Surrey College	30.05.2013	30.05.2013	28.06.2013	28.06.2013	8	Visit Scheduled		

Locate the visit and copy the 400 number in the 'My Activity Type' column. This is the reference number you need to open the QAP form submitted by the centre, before you can start working on the QAPV.



Quality System **Online Forms** 1

Search

Please select the form you require from the list below, and then click on the action you wish to perform.

Please choose 2

Customer No.

(or)

Reference No.  3

4

### Qualification Approval (QAP)

#### Form QAP

This form is to be completed with reference to the following documents:

- For City & Guilds UK centres: Our Quality Assurance Requirements and the Supporting Customer Excellence Centre Manual.
- For City & Guilds International centres: The International Centre Manual.
- For ILM centres: Our Quality Assurance Requirements and the ILM customer handbook.

All fields are mandatory unless otherwise stated.

#### Section 1 Contact details

1 Centre name

- |                |  |
|----------------|--|
| <span>1</span> | Click on the 'Online Forms' tab                            |
| <span>2</span> | Select <b>Qualification approval</b>                       |
| <span>3</span> | Copy the <b>Reference No</b> (400)                         |
| <span>4</span> | Click <b>Display</b>                                       |
| <span>5</span> | <b>View</b> the form on the right-hand side of the screen. |

# EQA04: QAP PROCESS

## ENTER AGREED VISIT DATE

**Plan Visit**

Plan Visit Start Date: 30.05.2013  
Plan Visit End Date: 30.05.2013  
Actual Visit Start Date:   
Actual Visit End Date:

Cancel Save Changes

In Actual visit start date and Actual visit end date enter the agreed date with centre. Start and End date must always coincide. (Visits always start and end on the same day)

Click to save date. Status of activity will change to **Visit Scheduled**.

Click here to enter dates

The visit will be in 'Consultant/EV assigned' status

Received	■	■
CAR Report Submitted	■	■
CAR Report Submitted	■	■
In Process with Consultant/EV	■	■
In Process with Consultant/EV	■	■
In Process with Consultant/EV	■	■
Consultant/EV Assigned	■	■
Consultant/EV Assigned	■	■

# EQA04: QAP PROCESS

## CREATE QAPV (1/12)

Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | QMS CGLI

History [Back](#) Forward

**Search**

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

Show me:

For Centre:

For Awarding org:

For Status:

For period \*  last year

Or From \*  To

**Search**

Transaction Number	Transaction Description	Centre	Start Date	End Date	Duration	Status		
8000044005	Remote Sampling 3748-01, 4222-21	East Surrey College	01.04.2013	01.04.2013	28.06.2013	28.06.2013	4	CAR Report Submitted
8000044003	Sampling Visit 3748-01, 4222-21	East Surrey College	01.05.2013	01.05.2013	27.06.2013	27.06.2013	8	CAR Report Submitted
8000044001	Exam Audit 3692	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV
8000044000	Systems Visit	East Surrey College	11.04.2013	11.04.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV
8000043999	Systems Visit (half day)	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV
8000043839	40002306 Remote QAP 0059-21	East Surrey College	01.01.2013	01.01.2013	00.00.0000	00.00.0000	4	Consultant/EV Assigned
8000043838	40002305 QAP Visit 0666-01, 6224-31	East Surrey College	30.05.2013	30.05.2013	28.06.2013	28.06.2013	8	Visit Scheduled

① Locate your QAP visit. The status has to be 'Visit scheduled'.

② Click on the Transaction number (800). This will open Online Forms on the right-hand side of the screen.



# EQA04: QAP PROCESS

## CREATE QAPV (2/12)

The screenshot shows the 'Quality System' interface with a search sidebar on the left and a main content area on the right. A blue callout box at the top center says 'Click to hide search fields and maximise the width of the screen', pointing to a red 'X' icon in the search sidebar. The main content area has a red header with the text 'Please select the form you require from the list below and then click on the action you wish to perform.' Below this is a form with the following fields: 'Please choose' (dropdown menu with 'QAPV Only' selected), 'Centre' (dropdown menu with '078311L Rutledge Recruitment' selected), and 'Reference No.' (text input with '8000044246'). Below the form are three buttons: 'Create', 'Change', and 'Display'. A shopping cart icon is visible on the left side of the main content area. The 'Online Forms' section below the shopping cart contains text describing the system and lists three types of reports: 'Centre Activity Report 1' (used for exam audits), 'Centre Activity Report 2' (used for senior/professional recognition award monitoring activity), and 'Centre Activity Report 3' (used for external quality assurance sampling/moderation activity).

1 Please select the form you require from the list below and then click on the action you wish to perform.

2 Please choose QAPV Only

3 Centre 078311L Rutledge Recruitment

4 Reference No. 8000044246

Create Change Display

### Online Forms

Online Forms allows you to view and submit a range of forms, including qualification approval applications (QAP) and centre updates (CU).

The Centre Activity Report (CAR) is the report form that is used by your Quality Consultant, Systems Consultant or Examinations Auditor. Unlike previous single form reports, the CAR has been split into several different forms. The CAR you will see during and after an external quality assurance activity will depend on the nature of the quality assurance activity undertaken.

Please see below for a description of each:

- Centre Activity Report 1 - is used for
  - exam audits
- Centre Activity Report 2 - is used for
  - senior / professional recognition award monitoring activity
- Centre Activity Report 3 - is used for
  - external quality assurance sampling / moderation activity
  - external quality assurance sampling / moderation activity-remote

1 Online Forms will open on the right-hand side of the screen

2 Select **QAPv only** from the dropdown menu

3 The **centre** and **Reference No** will be pre-populated

4 Click on **Create**

**Consultant's Report**

**Qualification Approval**

**Form QAPV**

City & Guilds **ilm**

A pre-populated QAPv will display.

City & Guilds qualification no(s)	Title(s) of qualification
218-01	Level 2 Certificate in Digital Television Aerial Installation

save

Service order number: 8000045737

Centre name: SOUTH NOTTINGHAM COLLEGE

Centre number (if allocated): 028378A

Address: WEST BRIDGFORD, NG2 7GA, NOTTINGHAM, United Kingdom

Telephone number: [empty]

Name of Centre Contact: David Drury

Name of Consultant: Derek Crawley

Date shown on corresponding Form QAP: 26.09.2013

**To be completed at end of visit**

Please indicate whether the organisation satisfies the requirements below:

As you progress through the form, use the floating Save button.

**SAVE  
REGULARLY  
TO AVOID  
LOSING  
DATA**

# EQA04: QAP PROCESS

## CREATE QAPV (4/12)

Select from the dropdown any qualifications **you are not** recommending approval for.

Assessment

Quality assurance and control

With reference to the corresponding QAP, I recommend that approval be granted for all the awards, complexes and(or) units, components for which approval is sought, except those listed below.

Delete?	Qualification, complex No & title	Complex no	Level	Report section no(s)	Unit/component no(s)	Comments
<input type="checkbox"/>	Please select					

Please select  
2391-02 L3 Cert Design.Erection & Add Ne

Date of Activity

Duration of Activity

If approval not recommended, date application to be reviewed (approx)

Additional approval activity, if required, will normally incur a charge.

Notes

Complete all sections of the form using the drop down boxes for each section

| History [Back](#) For

### Section 1 Supporting evidence

In relation to the areas of operation listed below and from the evidence identified on the corresponding Form QAP, please comment on the centres capability to offer the award(s), complex(es), and(or) units(s), component(s) for which approval is sought.

#### 1.1 Physical resources

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>	Please select		
<input type="checkbox"/>	Please select		
<input type="checkbox"/>	Records of remote, satellite or corporate Health & Safety Policy		
<input type="checkbox"/>	Equipment checklists		
<input type="checkbox"/>	RWE Criteria		

#### 1.2 Staff resources

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>	Please select		

Add New

Delete

# EQA04: QAP PROCESS

## CREATE QAPV (6/12)

**1.2 Staff resources**

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>	Please select		
<input type="checkbox"/>	Please select		
<input type="checkbox"/>	Organisational chart(s)		
<input type="checkbox"/>	Role profiles		
<input type="checkbox"/>	Communication strategy		
<input type="checkbox"/>	Records of team meetings		
<input type="checkbox"/>	Training needs analysis for Assessors/IVs		
<input type="checkbox"/>	Standardisation activities and records		
<input type="checkbox"/>	CPD opportunities and CPD records	Positive Comment	Negative Comment
<input type="checkbox"/>	Training and Development plans		
<input type="checkbox"/>	Staff induction pack		
<input type="checkbox"/>	Appropriate number of IQAs:Assessors and Assessor		
<input type="checkbox"/>	IQA/Assessor certificates, CVs and occupational comp		
<input type="checkbox"/>	Staff Development Plans		
<input type="checkbox"/>	Staff Handbook (Induction)		
<input type="checkbox"/>	RPL/Exemptions procedure		

**1.3 Assessment**

**1.4 Quality assurance and control**

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>	Please select		

# EQA04: QAP PROCESS

## CREATE QAPV (7/12)

**1.3 Assessment**

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>	Please select		
<b>Add New</b>	<ul style="list-style-type: none"><li>Please select</li><li>Relevant occupational standards</li><li>IQA sampling plan (including CAMERA)</li><li>Assessment documentation; portfolio, plans, observations</li><li>Candidate tracking system</li><li>Candidate induction pack</li><li>Candidate development plan</li><li>Candidate skills scans/Initial assessment</li><li>Schemes of work (where appropriate)</li><li>ILPs</li><li>Review records</li><li>IQA Checklist</li><li>IQA records</li><li>Centre record files</li><li>Candidate files</li><li>Minutes of meetings</li></ul>		

**1.4 Quality Assurance**

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>			
<b>Add New</b>			

**Section 7**

# EQA04: QAP PROCESS

## CREATE QAPV (8/12)

| History [Back](#)

▶ 1.4 Quality assurance and control

Delete?	Sources of Evidence	Positive Comment	Negative Comment
<input type="checkbox"/>	Please select		
<input type="checkbox"/>	Please select		
<input type="checkbox"/>	<ul style="list-style-type: none"><li>Quality assurance strategy</li><li>Quality assurance processes</li><li>City &amp; Guilds - Our Quality Assurance Arrangements</li><li>Supporting Customer Excellence Centre Manual</li><li>Guidance on internal verification of N/SVQs</li><li>Equal opportunities policy and monitoring</li><li>Records of Centre Update Form</li><li>Access to assessment</li><li>Appeals procedure</li></ul>		
<input type="checkbox"/>	2.1 Please no	tion approval criteria overall in relation to the following areas of operation and the	

# EQA04: QAP PROCESS

## CREATE QAPV (9/12)

### 1.5 Employer Involvement (Key Stage 5, 16-19 Technical qualifications only)

Delete?	Sources of evidence	Good Practice	Areas for Improvement
<input type="checkbox"/>	Please select		

Add New

Delete

Please select

- Research into potential employer involvement
- Evidence of employer consultation
- Letters/statements of intent from employers
- Signed agreements with employers
- Timetables/schedules for delivery of employer involvement
- Other (please state)



### Section 2 Action plan

2.1 Please note any follow-up action required to satisfy the qualification approval criteria overall in relation to the following areas of operation and the date by which such action should be taken.

Delete?	Relation to	Action required	By when (date)	By whom
<input type="checkbox"/>	Please select			Please select

Add New

- Please select
- Physical resources
- Staff resources
- Assessment
- Quality assurance and control

### Section 3 Additional Comment

Please add any additional comment here

Save Submit Print

When you have completed the form Click **Submit**. You will see a confirmation message. If you do not see this message check for any errors in the document. These are usually highlighted in red.

# EQA04: QAP PROCESS

## CREATE QAPV (11/12)

The screenshot shows a web browser window titled "City & Guilds Online Forms". On the left is a sidebar with a "Search" section containing instructions: "Please select the form you require from the list below, and then click on the action you wish to perform." Below this are input fields for "Please choose" (set to "QAPV Only"), "Customer No." (set to "064190 East Surrey Colleg"), and "Reference No." (set to "8000043838"). At the bottom of the sidebar are three buttons: "Create", "Change", and "Dis".

The main content area displays a large green circular icon with a white checkmark. Below it, the text reads "Your form has been submitted". A blue callout box points to this message with the text "This message will let you know the next step".

Another blue callout box at the top left of the main area says "Once Submitted you are only able to view the completed form".

At the bottom, a blue-bordered box contains the text: "What happens next" followed by "Your managing office/quality manager will process your report. UK/International Consultants only: Please submit your expenses now."

# EQA04: QAP PROCESS

## CREATE QAPV (12/12)

The status for the QAPV will update as shown

■	■	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.05.2013	01.05.2013	27.06.2013	27.06.2013	3	8	CAR Report Submitted	■	■
■	■	8000044001	Exam Audit 3692	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000			In Process with Consultant/EV	■	■
■	■	8000044000	Systems Visit	064190	East Surrey College	11.04.2013	11.04.2013	00.00.0000	00.00.0000	8		In Process with Consultant/EV	■	■
■	■	8000043999	Systems Visit (half day)	064190	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4		In Process with Consultant/EV	■	■
■	■	8000043839	40002306 Centre/Qualification Approval Visit	064190	East Surrey College	01.01.2013	01.01.2013	00.00.0000	00.00.0000	4		Consultant/EV Assigned	①	■
■	■	<u>8000043838</u>	40002305 QAP Visit 0666-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	28.06.2013	28.06.2013	8		Visit Scheduled	②	■
■	■	8000043838	40002305 QAP Visit 0666-01, 6224-31	064190	East Surrey College	30.05.2013	30.05.2013	28.06.2013	28.06.2013	8		Consultant/EV Report Submitted	③	■
■	■	8000002020	Sampling 4222-21 3748-01	064190	East Surrey College	04.02.2013	04.02.2013	25.02.2013	25.02.2013			PA1 sent to Customer	■	■

**EQA05**

**SYSTEMS VISIT**

# EQA05: SYSTEMS VISIT

## PLANNING A SYSTEMS VISIT

**Plan Visit**

Plan Visit Start Date: 01.03.2013

Plan Visit End Date: 01.03.2013

Actual Visit Start Date: 28.06.2013

Actual Visit End Date: 28.06.2013

Cancel Save Changes

In Actual visit start date and Actual visit end date enter the agreed date with centre. Start and End date must always coincide. (Visits always start and end on the same day)

Click to save date. Status of activity will change to **Visit Scheduled**.

Click here to enter dates

Identify the visit you want to plan. The status will be 'Consultant/EV assigned'.

800004	800004	800004																		
800004	800004	800004																		
800004	800004	800004																		
800004	800004	800004																		
800004	800004	800004																		
8000043999	Systems Visit (half day)	064190	East Surrey College	01.03.2013	01.03.2013	00.00.0000	00.00.0000	4												

# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (1/10)

■	■	8000044007	Half day Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.03.2013	01.03.2013	24.06.2013	24.06.2013	4	PA1 sent to Customer	■	■
■	■	8000044005	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	28.06.2013	28.06.2013	4	CAR Report Submitted	■	■
■	■	8000044003	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.05.2013	01.05.2013	27.06.2013	27.06.2013	8	CAR Report Submitted	■	■
■	■	8000044001	Exam Audit 3692	064190	East Surrey College	12.02.2013	12.02.2013	00.00.0000	00.00.0000	4	In Process with Consultant/EV	■	■
■	■	8000044000	Systems Visit	064190	East Surrey College	11.04.2013	11.04.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV	■	■
■	■	② 8000043999	Systems Visit (half day)	064190	East Surrey College	01.03.2013	01.03.2013	28.06.2013	28.06.2013	4	① Visit Scheduled	■	■

Click on the Transaction number (800). This will open Online Forms on the right-hand side of the screen.

Locate the Systems Visit. The Status has to be **Visit Scheduled**

## CAR - SYSTEMS VISIT (2/10)

Home Catalogue/Shop Quality  
Quality System | Online Forms | QMS CGLI

Click to hide search fields and maximise the width of the screen

Please select the form you require from the list below and then click on the action you wish to perform.

1

Please choose Centre Activity Report 4

2

Centre 061683 K College

3

Reference No. 8000044223

4

Create Change Display

Online Forms

### Online Forms

Online Forms allows you to view and submit a range of forms, including qualification approval applications (QAP) and centre updates (CU).

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Please see below for a description of each:

Centre Activity Report 1 - is used for

- exam audits

Centre Activity Report 2 - is used for

- senior / professional recognition award monitoring activity

Centre Activity Report 3 - is used for

- external quality assurance sampling / moderation activity
- external quality assurance sampling / moderation activity-remote

Centre Activity Report 4 - is used for

- systems visit
- systems advisory activity

Centre Activity Report 5 - is used for

1	Online Forms will open on the right-hand side of the screen
2	Select <b>Centre Activity Report 4</b> (systems) from the dropdown
3	The <b>centre</b> and <b>Reference No</b> will be pre-populated
4	Click on <b>Create</b>

### Centre Activity Report



Systems Visit

Systems Advisory

#### Section 1 Contact details

A pre-populated CAR will display.

1.1 Service Order	8000043999
1.2 Centre Name	East Surrey College
1.3 Centre number	064190
1.4 Centre contact	
- Title	
- First name	Michele
- Surname	Morgan
- Telephone number*	
- Email address*	mmorgan@esc.ac.uk

save

As you progress through the form, use the floating Save button.

**SAVE  
REGULARLY  
TO AVOID  
LOSING  
DATA**



# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (4/10)

Every time you press the Save button, you should see this message to confirm that the form has been saved successfully.

The screenshot shows a web application interface. On the left, there is a search panel with the following fields:

- Show me:
- For Centre:
- For Awarding org:
- For Status:
- For period:  last month
- Or From:  To:

Below these fields is a red **Search** button. On the right side of the screen, there is a large blue circular icon with a white lowercase 'i' inside. Below the icon, the text reads: **Your form has been saved.**

At the bottom of the right side, there is a note: *Don't forget you still need to submit the form once it is complete. To do this, go back to the form and click 'Change' to edit it.*

A red arrow points from the **Search** button in the left panel to the confirmation message on the right.

Click 'Search' to go back to your list of activities.  
Re-open the form in '**Change**' mode to continue working on it.

# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (5/10)

1.4 Centre contact	
- Title	
- First name	Angelina
- Surname	Ackerson
- Telephone number*	
- Email address*	angelina@southwark.ac.uk

Consultant Name	June Lang (for QC training only)
Type of Activity	Generic Advisory
Date of Activity (dd.mm.yyyy)	01.06.2012
Start Time (24 hrs clock)	08:00:00
Finish Time (24 hrs clock)	

Location of activity	Please select
----------------------	---------------

Please select
Please select
Centre
Remote
Assessment site
Centre including visit to assessment site

## CAR - SYSTEMS VISIT (6/10)

### Section 2 Summary of activity & centre staff met

2.1 General comments regarding the day including good practice, for support visit outline advice, guidance & training provided	Enter comments here
--	---------------------

save

2.2 Centre staff met
----------------------

Delete?	Staff Name	Role	Met
<input type="checkbox"/>	Angelica Smith	Assessor	<input checked="" type="radio"/> Yes <input type="radio"/> No

[Add New](#) [Delete](#)

2.3 Are there any risks with the Centre's quality assurance systems?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Comments	Enter comments here

Has the previous action plan been met by the centre?	<input type="text" value="Please select"/>
Comments	Enter comments here

# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (7/10)

### Section 3 Action/Improvement Plan

Delete?	Date set (dd:mm:yyyy)	Action/Improvement Point	Level of risk	By whom	By when (dd:mm:yyyy)	Date completed (dd:mm:yyyy)	* To be checked by (mandatory field)
<input type="checkbox"/>			Please s				

**Add New** **Delete**

Please select  
High  
Medium  
Low  
Improvement

Select a risk or improvement for each action.

The 'To be checked by' field is mandatory.

Any Actions must be clearly referenced to 'Our Quality Assurance Requirements' or the 'City & Guilds Centre Manual'

# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (8/10)

### Section 4 Quality Systems

\* All references are to Our Quality Assurance Requirements (OQAR) and the Supporting Customer Excellence Centre Manual (CM) or are referred to within the ILM customer Handbook and policies

Answer Yes or No to the questions in this checklist. Add comments.

save

Management Systems Checklist	Tick if seen	Comments	Action, Improvement required
Organisation chart(s) OQAR Section 11 & 4.c CM appx 1.c	<input type="checkbox"/>		Please select ▼
Quality assurance strategy & processes OQAR Section 11 & 4.c, 5.3 CM appx 1.c	<input type="checkbox"/>		Please select ▼
Internal/external communication strategy OQAR section 11 & 4 & 5.3 CM appx 1.a, b? & 4.9 (roles)	<input type="checkbox"/>		Please select ▼
Equal opportunities policy & Monitoring OQAR Section 11 & 4.c CM appx 1.c	<input type="checkbox"/>		Please select ▼
Appeals policy & procedures - including evidence of implementation and monitoring OQAR Section 11 & 4.c CM appx 1.c	<input type="checkbox"/>		Please select ▼
Complaints policy & procedure CM appx 6.2	<input type="checkbox"/>		Please select ▼
Records of team meetings OQAR section 11 & 5.3 CM appx 1c	<input type="checkbox"/>		Please select ▼
Records of Centre Updates OQAR section 11 & 6c CM appx 1c	<input type="checkbox"/>		Please select ▼
Records of remote or satellite sites OQAR section 11 & 6a CM appx 1h	<input type="checkbox"/>		Please select ▼
Records to document the respective roles and responsibilities of any partnership / third party arrangements OQAR section 4, 11 CM appx 1h	<input type="checkbox"/>		Please select ▼

# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (9/10)

Continuous Improvement Checklist	Tick if seen	Comments	Action, Improvement required
Annual training needs analysis for Assessor/Internal Quality Assurers OQAR section 11 & 9 appx 1, 2 CM 4.2, 6.5.3, 6.5.4,	<input type="checkbox"/>		Please select ▾
Training and development plans OQAR section 11 & 9 appx 1, 2 CM 4.2, 6.5.4,	<input type="checkbox"/>		Please select ▾
Learner tracking records analysis OQAR section 11 & 9 appx 1, 2 CM 4.2, 6.3.2, 6.3.7, Appx 1c,f	<input type="checkbox"/>		Please select ▾
Quality improvement plan OQAR section 11 & 9 appx 1, 2 CM 4.9, Appx 1c,	<input type="checkbox"/>		Please select ▾
Evaluation - including feedback from learners and completers OQAR section 11 & 9 appx 1, 2 CM 4.2, 4.9, 6.3.2, 6.5.4, 6.5.5	<input type="checkbox"/>		Please select ▾

Save

Additional checklist ( Is the centre aware of the following )	Yes/ No	Additional Comments	Action, Improvement required
Events available to them	Please ▾		Please s ▾
Smartscreen	Please ▾		Please s ▾
Learning Assistant	Please ▾		Please s ▾
ILM Events	Please ▾		Please s ▾
ILM Products	Please ▾		Please s ▾
ILM Services	Please ▾		Please s ▾
How to register for City & Guilds qualification updates	Please ▾		Please s ▾
Where to download handbooks from the website	Please ▾		Please s ▾
Where to download ILM Customer Handbook and policies from the website	Please ▾		Please s ▾
Evolve and the Examinations procedure and guidance	Please ▾		Please s ▾

Once the CAR is complete, click Submit.

ILM only : Please attach the Customer Review Form and the ILM review report.

# EQA05: SYSTEMS VISIT

## CAR - SYSTEMS VISIT (10/10)

If the CAR has been submitted successfully this message will appear.

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Catalogue/Shop', 'Reports', and 'Quality'. Below the navigation bar, there are links for 'Quality System', 'Online Forms', and 'QMS CGLI'. On the right side of the page, there are links for 'History', 'Back', and 'Forward'. The main content area features a large green circular icon with a white checkmark, indicating a successful submission. Below the icon, the text reads 'Your form has been submitted'. To the left of the main content, there is a search filter section with a 'Search' button at the top. The filter section includes a heading 'Define your search by using the criteria below. The fields may change depending upon the selections made.' and several dropdown menus: 'Show me:' (My Activities), 'For Centre:' (All my Centres), 'For Awarding org:' (empty), 'For Status:' (All Statuses), 'For period \*' (last month), and 'Or From \*' (empty) with a 'To' field. A red callout box points to the 'Search' button. A blue callout box points to the confirmation message, and another blue callout box points to a text box below the message.

Search

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

Show me:

For Centre:

For Awarding org:


For Status:

For period \*

Or From \*  To

Search

History Back Forward



Your form has been submitted

This message will let you know the next step

What happens next

Your managing office/quality manager will process your report. Please submit your expenses now.

Click 'Search' to go back to your list of activities.  
Re-open the form in 'Display' mode to view/print/amend it.

# EQA05: SYSTEMS VISIT

## PROCESSING CAR AFTER SUBMISSION (1/2)

Once you submit the CAR, the status of the activity will change to **CAR Report Submitted** as shown below. This means:

- The report can still be amended by you or the Managing Territory Office.
- The Managing QUALITY TEAMS will review the report, and they may wish to make changes to the content. They may ask you to review the report and enter additional information if necessary. To do this, open the form in **Display** mode, **make the necessary changes** and click **Save**.
- The Centre cannot see the report in the Walled Garden at this stage. You should not email them a copy – The Managing QUALITY TEAMS will do so once the report is fully processed (see next page).

The screenshot displays the 'Quality System' interface. At the top, there is a navigation bar with 'Home', 'Catalogue/Shop', 'Reports', and 'Quality'. Below this, a sub-menu shows 'Quality System | Online Forms | QMS CGLI'. On the right side of the page, there are links for 'History', 'Back', and 'Forward'. On the left, there is a 'Search' section with a red header and a search bar. Below the search bar, there is a text prompt: 'Define your search by using the criteria below. The fields may change depending upon the selections made.' There are five search criteria: 'Show me:' with a dropdown set to 'My Activities'; 'For Centre:' with a dropdown set to 'All my Centres'; 'For Awarding org:' with a dropdown set to '1000 City & Guilds'; 'For Status:' with a dropdown set to 'All Statuses'; and 'For period \*' with a radio button selected for 'last week'. The main content area is titled 'Activity Details' and contains a table with the following columns: Plan Visit, Consultant Note, Transaction, My Activity Type, Centre, Name, Planned Visit Start, Planned Visit End, Actual Visit Start, Actual Visit End, Activity Duration, Status, and Reject Visit. The table contains three rows of data. The second row is highlighted with a blue box around the 'Status' cell, which contains the text 'CAR Report Submitted'. The other rows have a status of 'In Process with Consultant/EV'. Each row also has a red square icon in the 'Reject Visit' column.

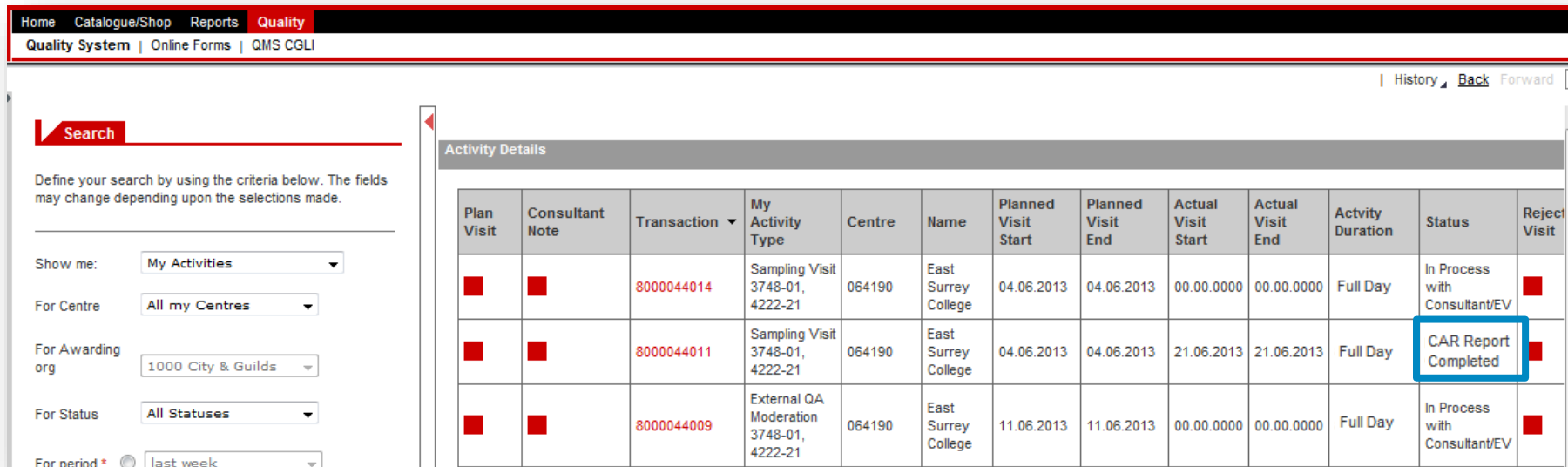
Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit
■	■	8000044014	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■
■	■	8000044011	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	Full Day	CAR Report Submitted	■
■	■	8000044009	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■



## PROCESSING CAR AFTER SUBMISSION (2/2)

Once the Managing QUALITY TEAMS has finished processing the report, the status of the activity will change to **CAR Report Completed** as shown below. This means:

- The report can no longer be changed (with the exception of the completion date in the Action/Improvement Plan, as shown on the next page)
- The Centre can view the report in the Walled Garden. If they don't have access yet, the Managing Local Office will email them a copy of the report.



Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | QMS CGLI

History [Back](#) [Forward](#)

**Search**

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

Show me:

For Centre:

For Awarding org:

For Status:

For period:

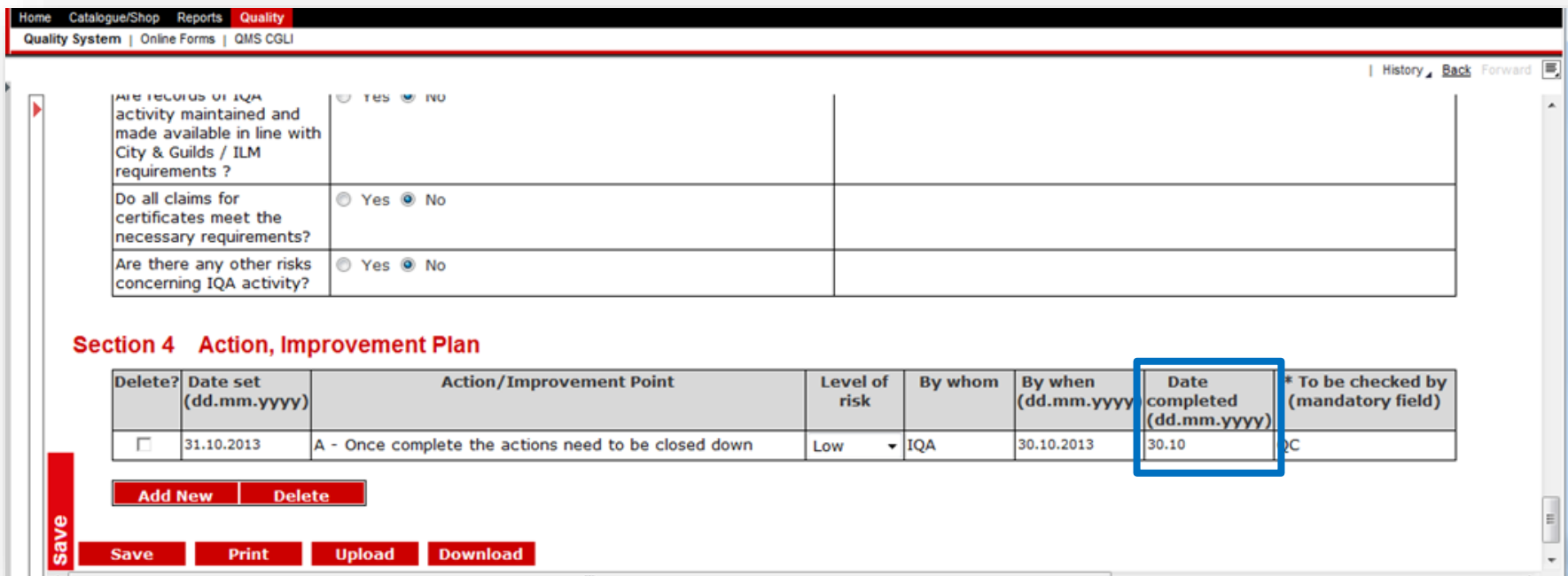
**Activity Details**

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status	Reject Visit
■	■	8000044014	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■
■	■	8000044011	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	Full Day	CAR Report Completed	■
■	■	8000044009	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	00.00.0000	00.00.0000	Full Day	In Process with Consultant/EV	■

## ACTION / IMPROVEMENT PLAN COMPLETION

You can close an action on the CAR at any time after it has been processed. To do this:

- Find the activity in **My Activities**.
- Click on the Transaction number (800) and open the form in **Display** mode.
- Populate the **Date completed**.
- Click **Save**



The screenshot shows a web-based form for completing an action or improvement plan. The form is titled "Section 4 Action, Improvement Plan" and contains a table with the following data:

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point	Level of risk	By whom	By when (dd.mm.yyyy)	Date completed (dd.mm.yyyy)	* To be checked by (mandatory field)
<input type="checkbox"/>	31.10.2013	A - Once complete the actions need to be closed down	Low	IQA	30.10.2013	30.10	QC

Below the table, there are buttons for "Add New" and "Delete". At the bottom of the form, there are buttons for "Save", "Print", "Upload", and "Download".

**EQA06**

**OFFLINE FORMS**

**INSTALLATION GUIDE**

# EQA06: OFFLINE FORMS INSTALLATION

## GUIDE

### OVERVIEW

This section shows you how to install the offline forms applications onto your laptop.

You will only have to do this once.

There are two applications to download:

- 1. Silverlight:** This is available for free on the Internet and it is very likely that you already have it installed.
- 2. City and Guilds Offline Forms** application: This is very small and should be installed in a matter of seconds.

# EQA06: OFFLINE FORMS INSTALLATION GUIDE

## 1. SILVERLIGHT

The screenshot shows the Microsoft Silverlight website in a Windows Internet Explorer browser. The address bar displays <http://www.microsoft.com/silverlight/>. The page features the Silverlight logo, a search bar, and navigation links. A large blue callout box on the right contains the instruction: "1 Go to: <http://www.microsoft.com/silverlight/>". A second blue callout box on the left contains the instruction: "2 Click **Download Now** and follow the steps. If you already have Silverlight installed, the system will tell you." A red rectangular box highlights the "DOWNLOAD NOW" button on the page. The button is purple with the text "DOWNLOAD NOW" and a right-pointing arrow.

# EQA06: OFFLINE FORMS INSTALLATION GUIDE

## 2. CITY & GUILDS APPLICATION (1/5)

Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | Verification | QMS CGLI | QMS ILM

History Back Forward

### Search

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

Show me: My Centres

For Centre: 006751 ABC TRAININ

For Awarding org: 1000 City & Guilds

Search

### Quality System

### Welcome

Here you will be able to:

- View your allocated Centres
- View and manage all activities allocated to you
- View and amend your personal details, including submitting your CPD
- View and submit your fees and expenses

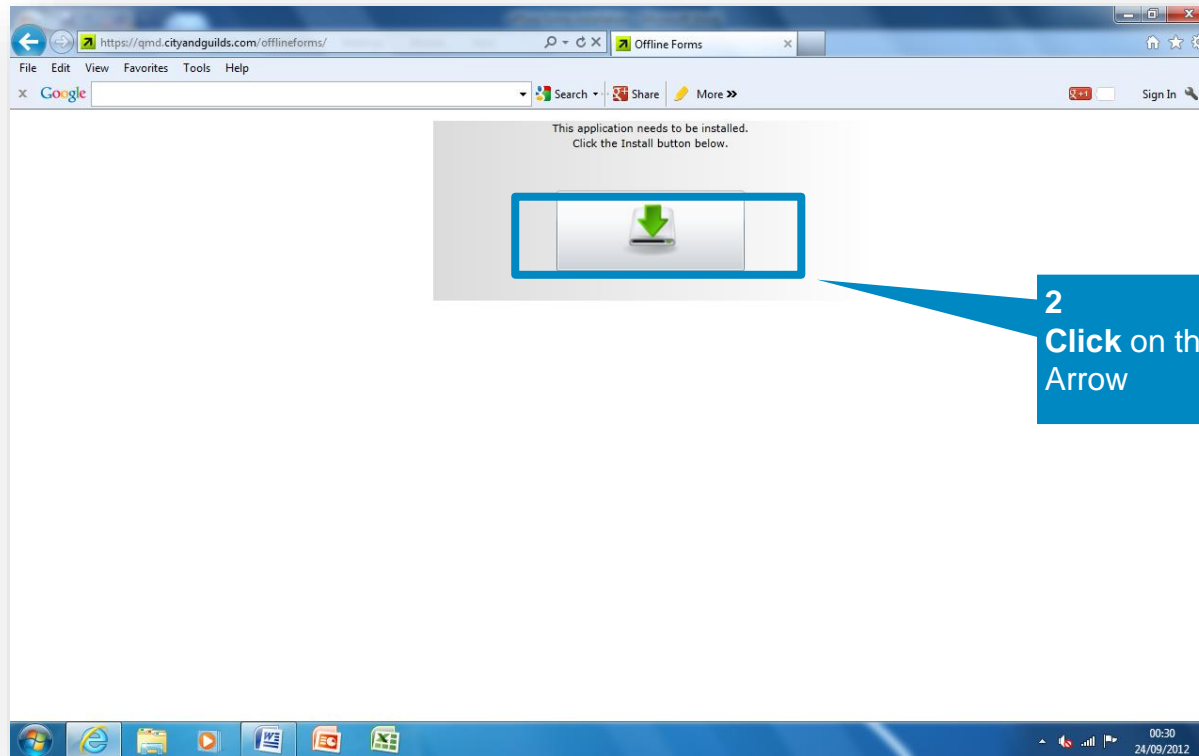
### Offline Forms

Offline forms allow you to complete CAR, CAPv and QAPv forms on your hard drive without an internet connection. You will need to install Silverlight (which is available for free on the internet), as well as a bespoke City & Guilds application which can be found [here](#). You will only have to install the software once. Please refer to the user guides for further information.

1 Click here to go download the software.

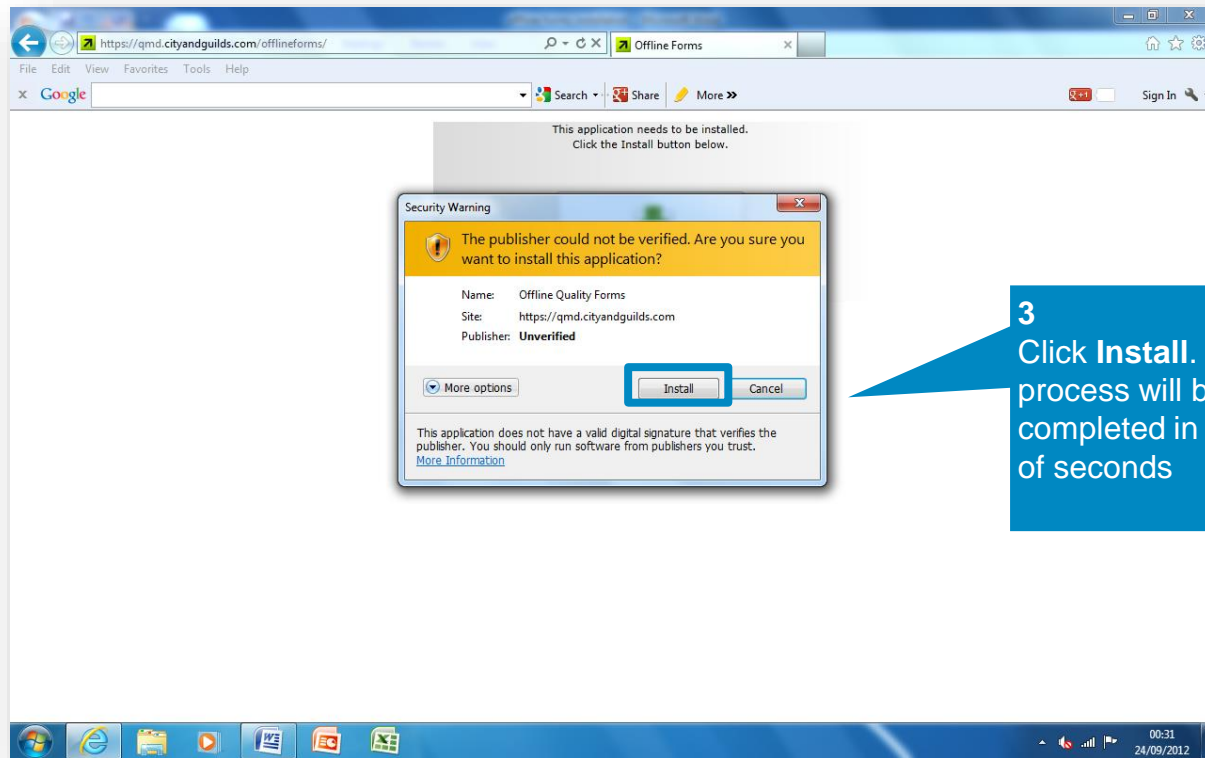
# EQA06: OFFLINE FORMS INSTALLATION GUIDE

## 2. CITY & GUILDS APPLICATION (2/5)



# EQA06: OFFLINE FORMS INSTALLATION GUIDE

## 2. CITY & GUILDS APPLICATION (3/5)

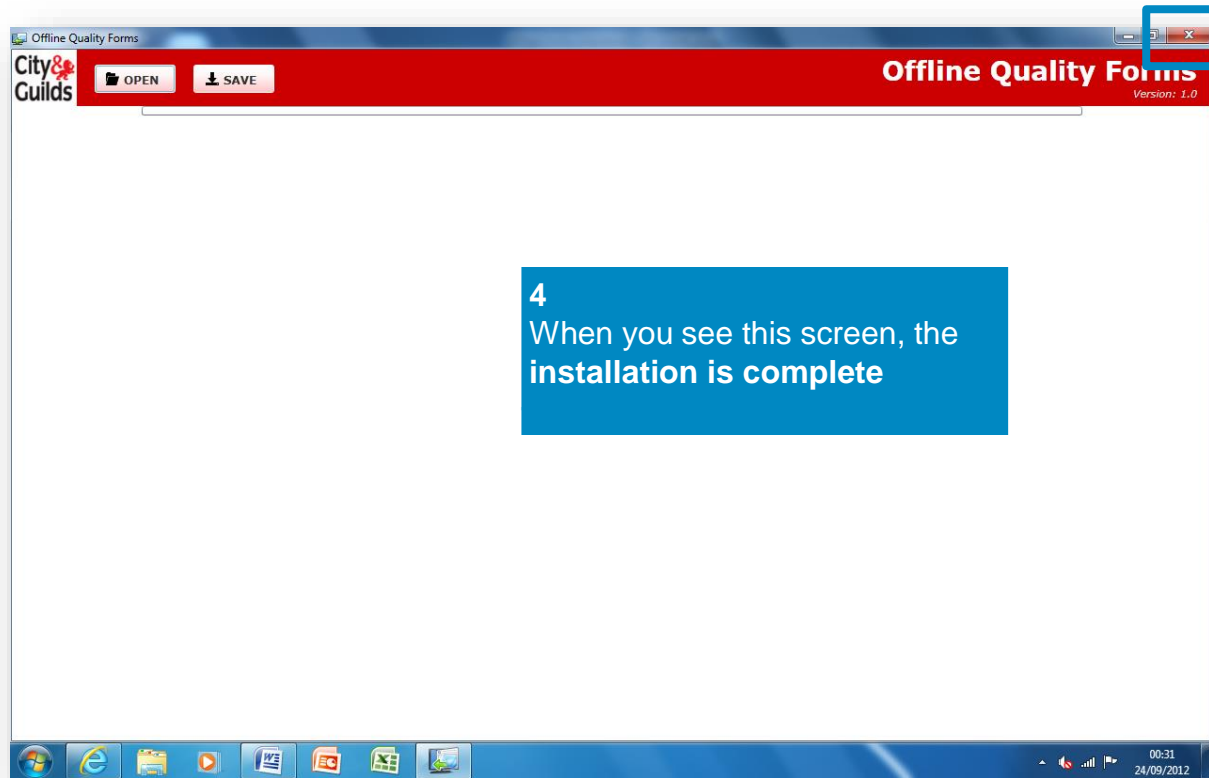


3  
Click **Install**. The process will be completed in a matter of seconds



# EQA06: OFFLINE FORMS INSTALLATION GUIDE

## 2. CITY & GUILDS APPLICATION (4/5)



# EQA06: OFFLINE FORMS INSTALLATION GUIDE

## 2. CITY & GUILDS APPLICATION (5/5)



This the icon you will see on your desktop.

You will use this application to view and update your offline forms.

**EQA07**

**USING**

**OFFLINE FORMS**

# EQA07: USING OFFLINE FORMS

## 1. CREATE AND DOWNLOAD

**Search**

Please select the form you require from the list below, and then click on the action you wish to perform.

Please choose: **Centre Activity Report 3**

Customer No.

(or)

Reference No.

**Create** **Change** **Display**

**1. Create a blank form as usual in the offline form tab or using the 8000 number**

Do learners have regular opportunities to revise their assessment plan accordingly?  Yes  No

Are particular assessment requirements of learners identified and met where possible?  Yes  No

Were any assessments completed in Welsh? If so, please provide further details in section 2.1  Yes  No

### 3.3 Sampling Pages

Delete?	Type of assessment	Learner name	Learner enrolment number	Learner registration date (dd.mm.yyyy)	Qualification sampled	Unit(s) sampled	Interim or final IV	Assessor name	Date of assessment (dd.mm.yy)
<input type="checkbox"/>	Please select						Please :		

**Add New** **Delete**

Have all programme operations been compiled with?  Yes  No

Is the assessment strategy complied with?  Yes  No

Are quality assurance requirements met?  Yes  No

### Section 4 Action, Improvement Plan

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point (Please enter A or I before text to specify type of point)	By whom	By when (dd.mm.yyyy)	Date completed (dd.mm.yyyy)	To be checked by
<input type="checkbox"/>			Please select			Please select

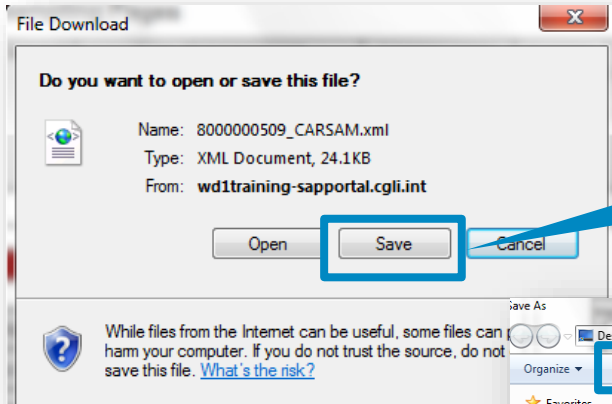
**Add New** **Delete**

**Save** **Submit** **Print** **Upload** **Download**

**2. Scroll down and click download**

# EQA07: USING OFFLINE FORMS

## 2. SAVE TO LOCAL DRIVE

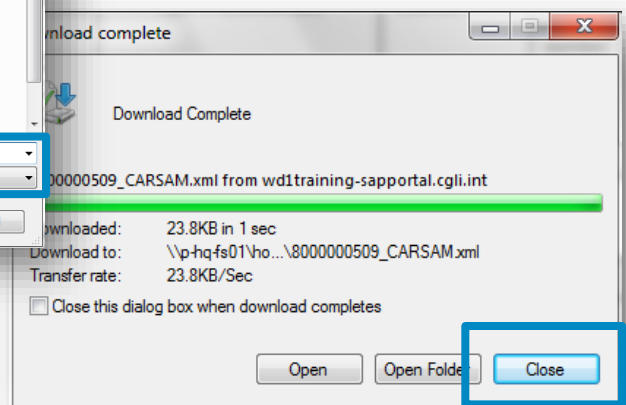
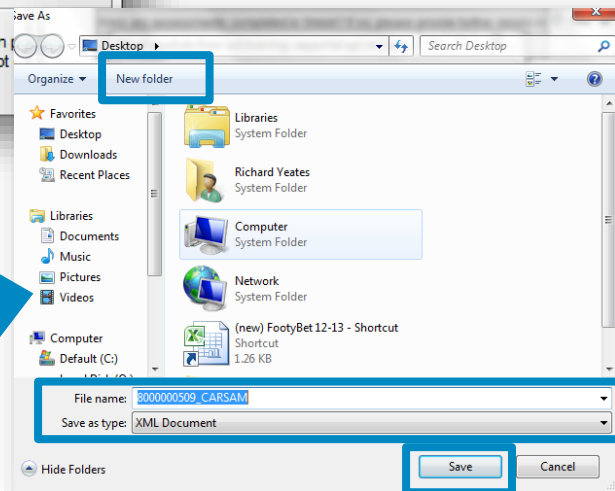


1. Click **Save** and follow the screens

2. Choose a **folder** to save the file. Alternatively create a **new folder**. Choose a **file name** to identify the form. Click **Save**. Make a note of where it is saved.

The file will always be in html format.

(You only have to choose a folder the first time you download a form. Thereafter, the system will always default to the same location.)



3. When the download is finished, click **Close**.

# EQA07: USING OFFLINE FORMS

## 3. OPEN OFFLINE FORMS APPLICATION



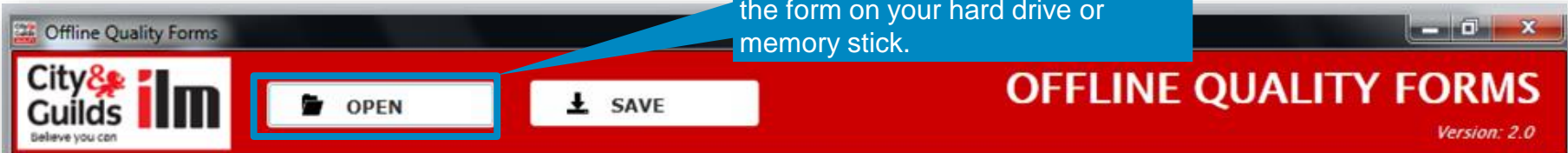
When you are offline and wish to use the downloaded form, **click on the icon on your desktop.**

This will launch the offline forms application.

# EQA07: USING OFFLINE FORMS

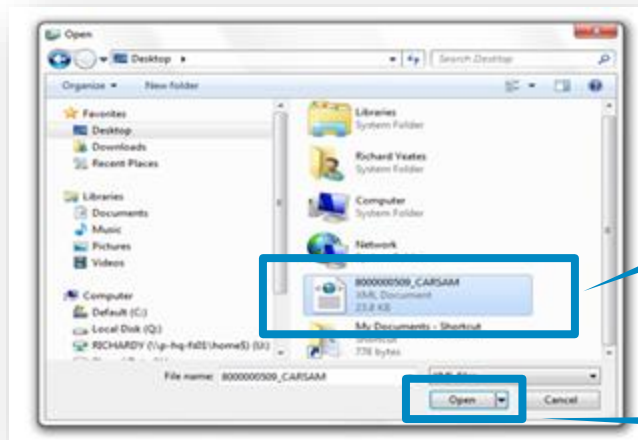
## 4. OPEN FORM OFFLINE

1. Click on this icon to locate and open the form on your hard drive or memory stick.



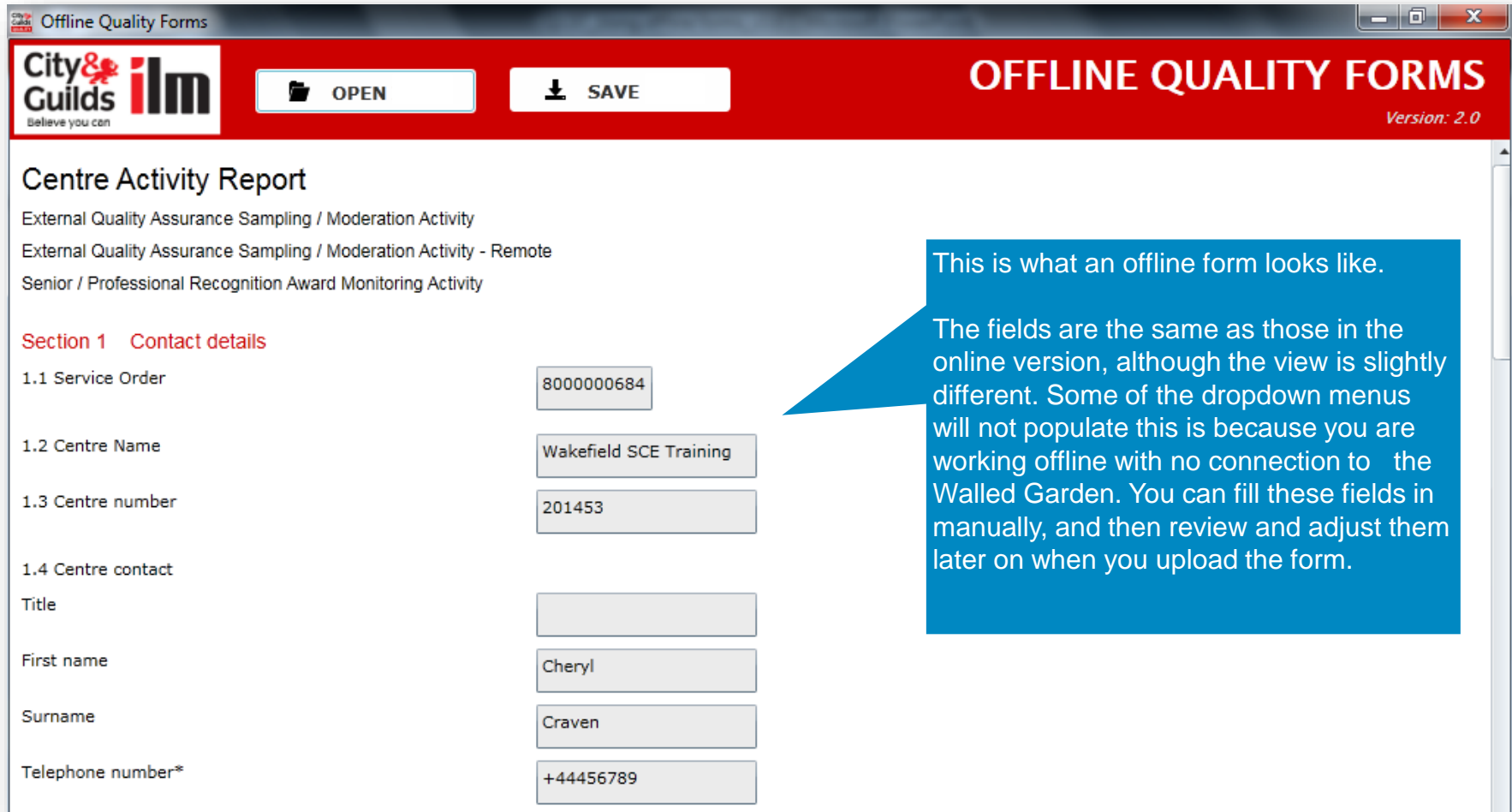
Click on the 'Open' button on the toolbar, and find your downloaded form to access it offline.

While you are completing the form offline you can save it at anytime, by clicking on the 'Save' button.



2. Find the form you are looking for and click on it.

3. Click Open.



Offline Quality Forms

City & Guilds **ilm** **OFFLINE QUALITY FORMS** Version: 2.0

OPEN SAVE

### Centre Activity Report

External Quality Assurance Sampling / Moderation Activity  
External Quality Assurance Sampling / Moderation Activity - Remote  
Senior / Professional Recognition Award Monitoring Activity

**Section 1 Contact details**

1.1 Service Order

1.2 Centre Name

1.3 Centre number

1.4 Centre contact

Title

First name

Surname

Telephone number\*

This is what an offline form looks like.

The fields are the same as those in the online version, although the view is slightly different. Some of the dropdown menus will not populate this is because you are working offline with no connection to the Walled Garden. You can fill these fields in manually, and then review and adjust them later on when you upload the form.



## 6. SAVE FORM OFFLINE

The screenshot shows the 'Offline Quality Forms' application window. The title bar reads 'Offline Quality Forms'. The interface has a red header with the City & Guilds logo on the left and the text 'OFFLINE QUALITY FORMS' and 'Version: 2.0' on the right. Below the header, there are two buttons: 'OPEN' and 'SAVE'. The 'SAVE' button is highlighted with a red box. The main content area is titled 'Centre Activity Report' and contains several sections of form fields. A blue callout box points to the 'SAVE' button with the text: '1. Once you have finished with the form, click here to save it in your hard drive and close the application. You don't have to fill in the whole form in one session. You can save it using this button, and open it again at any time until you upload it.' Another blue callout box points to the 'Saved' message box with the text: '2. You will see a POP UP message to confirm the save was successful'. The 'Saved' message box is black with white text and contains the text: 'Saved', 'Information saved successfully.', and 'The Xml is saved at: \\p-hq-fs01\home\$\JUNEL\Desktop\'. The form fields are as follows:

Section	Field	Value
Section 1 Contact details	1.1 Service Order	8000000684
	1.2 Centre Name	Wakefield SCE Training
	1.3 Centre number	201453
	1.4 Centre contact Title	
	First name	
	Surname	
	Telephone number*	

# EQA07: USING OFFLINE FORMS

## 7. VIEW YOUR SAVED OFFLINE FORMS (1/2)



When you wish to view the saved form you have been working on **click on the icon on your desktop.**

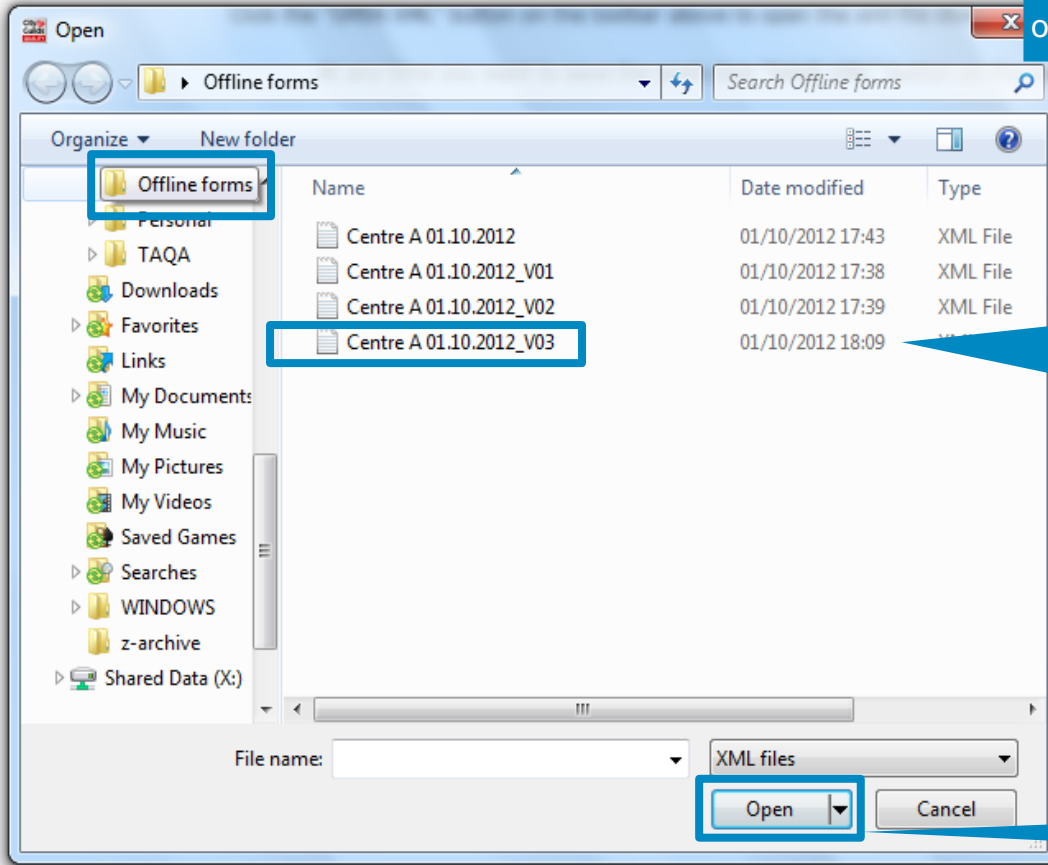
This will launch the offline forms application.

# EQA07: USING OFFLINE FORMS

## 7. VIEW YOUR SAVED OFFLINE FORMS (2/2)



1. Click on this icon to locate and open the form on your hard drive or memory stick.



2. Find the form you are looking for and click on it.  
Every time you save the report the version number will be updated

3. Click **Open**.

# EQA07: USING OFFLINE FORMS

## 8. UPLOADING THE OFFLINE FORM (X/X)

To upload the completed offline CAR follow these steps

1 – Select my Activities in the Walled Garden Quality Portal

Home Catalogue/Shop Reports **Quality**  
Quality System | Online Forms | QMS CGLI

**Search**

Define your search by using the criteria below. Fields may change depending upon the selection made.

① Show me: **My Activities**

For Centre: **All my Centres**

For Awarding org: **City & Guilds**

For Status: **All Statuses**

For period \*  **last year**

Or From \*  To

**Search**

Activity Details

Plan Visit	Consultant Note	Transaction	My Activity Type	Centre	Name	Planned Visit Start	Planned Visit End	Actual Visit Start	Actual Visit End	Activity Duration	Status
■	■	<a href="#">8000044014</a>	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	00.00.0000	00.00.0000	8	In Process with Consultant/EV
■	■	<a href="#">8000044011</a>	Sampling Visit 3748-01, 4222-21	064190	East Surrey College	04.06.2013	04.06.2013	21.06.2013	21.06.2013	8	CAR Report Submitted
■	■	<a href="#">8000044009</a>	External QA Moderation 3748-01, 4222-21	064190	East Surrey College	11.06.2013	11.06.2013	28.06.2013	28.06.2013	8	CA1 sent to Customer
■	■	<a href="#">8000044007</a>	Half day Sampling Visit 3748-01, 4222-21	064190	East Surrey College	01.03.2013	01.03.2013	24.06.2013	24.06.2013	4	PA1 sent to Customer
■	■	<a href="#">8000044005</a>	Remote Sampling 3748-01, 4222-21	064190	East Surrey College	01.04.2013	01.04.2013	28.06.2013	28.06.2013	4	CAR Report Submitted

2 – Select the 8000 transaction number and click on the link

# EQA07: USING OFFLINE FORMS

## 8. UPLOADING THE OFFLINE FORM (X/X)

The screenshot shows the 'Quality System' interface with a search bar and a list of forms. A red circle with the number '1' is placed over the search bar. A dropdown menu is open, showing a list of forms, with 'Centre Activity Report 3' selected. A red circle with the number '2' is placed over the 'Change' button in the bottom right corner of the interface.

Home Catalogue/Shop Reports Quality  
Quality System | Online Forms | QMS CGLU

Search

Please select the form you require from the list below, and then click on the action you wish to perform.

Please choose

Centre

Online Forms

Centre Activity Report 3

Select

CAPV and QAPV

Centre Activity Report 1

Centre Activity Report 2

Centre Activity Report 3

Centre Activity Report 4

Centre Activity Report 5

Centre Activity Report 6

Centre Approval

Centre Approval-International

Centre Update

QAPV Only

Qualification Approval

Qualification Approval-International

RAP Re-approval Process

Sampling Form CA2

Sampling Form PA1

Centre Activity Report 2 - is used for  
• senior / professional recognition award monitoring activity

Show me: My Activities

For Centre: All my Centres

For Awarding org:

For Status: All Statuses

For period: last month

Or From: To:

Search

History Back Forward

Select Centre Activity Report 3 (CAR 3)

Click **Change**

The screenshot shows the 'Quality System' interface with the form details. A red circle with the number '2' is placed over the 'Change' button. The form details include the Centre name '064190 East Surrey College' and the Reference No. '000045596'. The 'Change' button is highlighted in red.

Home Catalogue/Shop Reports Quality  
Quality System | Online Forms | QMS CGLU

Search

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

Show me: My Activities

For Centre: All my Centres

For Awarding org:

Centre: 064190 East Surrey College

Reference No.: 000045596

Create Change Display

Online Forms

Online Forms

History Back Forward

# EQA07: USING OFFLINE FORMS

## 8. UPLOADING THE OFFLINE FORM (X/X)

City & Guilds Online Forms

Delete?	Type of assessment	Learner name	Learner enrolment number	Learner registration date (dd.mm.yyyy)	Qualification sampled	Unit(s) sampled	Interim or final IV	Assessor name	Date of assessment (dd.mm.yyyy)	Do you agree with the Assessors judgments?	Internal Quality Assurer name	Date of Internal Quality Assurance (if sampled mm.yyy)
<input type="checkbox"/>	Please select						Please select			Please select		

**Add New** **Delete**

Have all programme operations been complied with?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Is the assessment strategy complied with?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Are quality assurance requirements met?	<input type="radio"/> Yes <input checked="" type="radio"/> No

**5 – Click 'Upload'**

### Section 4 Action, Improvement Plan

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point (Please enter A or I before text to specify type of point)	By whom	By when (dd.mm.yyyy)	Date completed (dd.mm.yyyy)	To be checked by
<input type="checkbox"/>						

**Add New** **Delete**

**Save** **Submit** **Print** **Upload** **Download**

# EQA07: USING OFFLINE FORMS

## 8. UPLOADING THE OFFLINE FORM (X/X)

completed report

File upload

Please select the file you wish to upload:

Browse Upload

Interim or final IV Assessor name Date of assessment (dd.mm.yyyy) Do you agree with the Assessors judgments? Internal Quality Assurer name Date of Internal Quality Assurance (if sampled mm.yyy)

Save

Have all programme operations been complied with?

Is the assessment strategy complied with?

Are quality assurance requirements met?

**Section 4 Action, Improvement Plan**

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point (Please enter A or I before text to specify type of point)
<input type="checkbox"/>		

Add New Delete

To be checked by

Choose File to Upload

Desktop

452 KB Shared Data (X) - Shortcut  
552 bytes

StC and GPCspreadsheet  
Microsoft Excel Worksheet  
12.5 KB

TAQA Learner Evaluation  
Microsoft Word Document  
13.8 KB

Upload Test  
XML File  
21.2 KB

Upload Test\_V01  
XML File  
24.4 KB

File name: Upload Test\_V01

All Files (\*.\*)

Open Cancel

7 - Click 'open'

8 - Click 'Upload'

Save

File upload

Please select the file you wish to upload:

\\p-hq-fs01\home\$UUNEL\Desktop\Upload Test\_V01.xml

Browse Upload

## 8. UPLOADING THE OFFLINE FORM (X/X)

10 – Click 'Save' you will then see your off line populated report

Home Catalogue/Shop Reports **Quality**

Quality System | Online Forms | QMS CGLI

History [Back](#) Forward

**Search**

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

Show me:

For Centre:

For Awarding org:

For Status:

For period \*  last year

Or From \*  To

**Search**

Location of activity

**Save**

### Section 2 Summary of activity & centre staff met

2.1 General comments regarding the day including good practice, for support visit outline advice, guidance & training provided	Test report to demonstrate uploading to the Walled Garden
Are there any risks with the Centre's quality assurance systems?	



# EQA07: USING OFFLINE FORMS

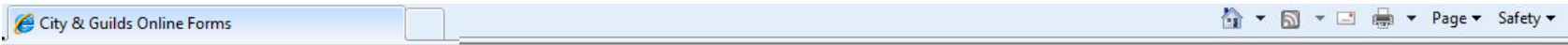
## 8. UPLOADING THE OFFLINE FORM (X/X)

The screenshot shows the 'City & Guilds Online Forms' web application. On the left, there is a search and selection interface. It includes a search bar, a dropdown menu for form selection (currently set to 'Centre Activity Report 3'), and input fields for 'Customer No.' (064190 East Surrey College) and 'Reference No.' (8000044011). Below these are three buttons: 'Create', 'Change', and 'Display'. A dropdown menu is open, showing a list of forms including 'Centre Activity Report 3', which is highlighted. A blue callout box points to this menu with the text: 'To update the CAR 3 click on **Change** to view the CAR 3 Click on **Display**'.

The main content area displays a large blue information icon (a lowercase 'i' in a circle) and the text 'Your form has been saved.' A blue callout box above the icon says: 'If the save has been successful this message will appear'. Another blue callout box to the right of the icon says: 'This message will let you know the next step'. Below the main message, a blue-bordered box contains the text: 'Don't forget you still need to submit it once complete. You can still make changes by clicking on the 'Change' button at any time before submitting.'

# EQA07: USING OFFLINE FORMS

## 8. UPLOADING THE OFFLINE FORM (X/X)



Search

Please select the form you require from the list below, and then click on the action you wish to perform.

Please choose: Centre Activity Report 3  
Customer No.: 064190 East Surrey College  
(or)  
Reference No.: 8000044011

Create Change Display

- Centre Activity Report 3
- Select
- CAPV and QAPV
- Centre Activity Report 1
- Centre Activity Report 2
- Centre Activity Report 3
- Centre Activity Report 4
- Centre Activity Report 5
- Centre Activity Report 6
- Centre Approval
- Centre Approval-International
- Centre Update
- QAPV Only
- Qualification Approval
- Qualification Approval-International
- RAP Re-approval Process
- Sampling Form CA2
- Sampling Form PA1



Your form has been submitted

If the Submit has been successful this message will appear

This message will let you know the next step

**What happens next**  
*Your managing office/quality manager will process your report. Please submit your expenses now.*

Once submitted the CAR 3 cannot be amended. To view the CAR 3 click **display**.

**EQA08**

**TRAFFIC REPORTS**

# EQA08: TRAFFIC REPORTS

1 Click on the 'Reports'

2 Click on 'Candidates/Results'

The screenshot shows the City & Guilds Walled Garden website interface. At the top, there is a navigation bar with the following items: Home, Catalogue/Shop, Reports (highlighted with a blue box and callout '1 Click on the 'Reports''), and Quality. Below this is a secondary navigation bar with: Orders, Candidates/Results (highlighted with a blue box and callout '2 Click on 'Candidates/Results''), LRS, Qualifications, Financial, and Amend On Demand Orders. The main content area is titled 'Candidates / Results reports' and features a search form on the left and a text area on the right. The search form includes fields for 'Show me' (set to 'Registration Listing'), 'EV Centre', 'for \* Qualification nnnn-nn', 'for period \*' (set to 'last week'), 'or since \*', and 'or From \*'. A red 'Search' button is at the bottom of the form. The right-hand text area contains the following text: 'Candidates / Results reports', 'Welcome to the Candidates / Results reporting section of the Walled Garden, where you can search for a whole host of reports linked to candidates, registrations, results and timetables.', 'The Candidates / Results reports screen is displayed in two sections. The pane to the left consists of a search area, where you define your requirements, and this right hand pane is where the details are displayed.', and 'For further assistance, click on the question mark icon at the top right.' An image of an abacus is also present on the left side of the main content area.

# EQA08: TRAFFIC REPORTS

- 1 Select 'Registration Listing' for registered candidates or 'Qualification Listing' for certificated candidates
- 2 Complete 'EV Centre' field with the centre number
- 3 Complete 'for qualification nnnn-nn' with the full qualification number

Home Catalogue/Shop Reports Quality

Orders | Candidates/Results | LRS | Qualifications | Finance

**Search**

Define the report by using the search fields below. The fields may change depending upon the search criteria made. Click **Search** to continue.

1 Show me

2 EV Centre

3 for \*   
Qualification nnnn-nn

4 for period \*  last week  
or since \*  January   
or From \*   
To

\* denotes mandatory field

In this search ENR no. or ULN; or Last name and Gender are mandatory, together with period or since.

**Search**

**Candidates / Results**

### Candidates / Results reports

Welcome to the Candidates / Results reporting section of the Walled Garden, where you can search for a whole host of reports linked to candidates, registrations, results and timetables.

The Candidates / Results reports screen is displayed in two sections. The pane to the left consists of a search area, where you define your requirements, and this right hand pane is where the details are displayed.

For further assistance, click on the question mark icon at the top right.

# EQA08: TRAFFIC REPORTS

Click on the Red Triangle to view a full page

Home Catalogue/Shop **Quality**  
Quality System | Online Forms | **Candidates/Results** | QMS CGLI

History [Back](#) Forward

depending upon the selections made. Click search to continue.

Show me: **Registration Listing**

EV Centre: 026126

for \* Qualification nnnn-nn: 6302-04

for period \*  last week

or since \*  January 2011

or From \* To

\* denotes mandatory field

In this search ENR no. or ULN; or Last name and Gender are mandatory, together with period or since.

**Search**

your search results

Order code	Description
6302-04	Level 4 Preparing to Teach in the Lifelo

Candidate List

ENR no.	ULN	First Name	Middle Name	Last Name	DOB	Gender	Registration Date	Registration Expiry Date	Merged to	Merged Date
AHX2251	3640730800	Paul	Brian			M	19.11.2012	19.11.2013		
CFA1314	1631025103	Ian	Mark			M	15.10.2012	15.10.2013		
EGA0628	5106666219	Deborah	Louise			F	15.10.2012	15.10.2013		
UG7277	7296935986	Craig				M	22.11.2012	22.11.2013		
IKD2360	7802025639	Marc	Carter			M	15.10.2012	15.10.2013		

**Download** **Print**

Trusted sites | Protected Mode: Off | 100%

# EQA08: TRAFFIC REPORTS

To find a candidate on your keyboard press 'Ctrl and f' at the same time you will see this pop up field

The screenshot shows the SAP NetWeaver Portal interface. At the top, there is a search bar with the text 'Find:'. Below the search bar, the City & Guilds logo and 'Walled Garden' are visible. The main content area displays search results for 'Level 4 Preparing to Teach in the Lifelo'. A table titled 'Candidate List' contains the following data:

ENR no.	ULN	First Name	Middle Name	Last Name	DOB	Gender	Registration Date	Registration Expiry Date	Merged to	Merged Date
EGA0628	5106866219	Deborah	Louise			F	15.10.2012	15.10.2013		
UG7277	7296935986	Craig				M	22.11.2012	22.11.2013		
IKD2360	7802025639	Marc	Carter			M	15.10.2012	15.10.2013		
LBP9309	7882051178	Catherine				F	15.10.2012	15.10.2013		
VBB4623	4484848278	Linsev				F	15.10.2012	15.10.2013		

At the bottom right of the table, there are buttons for 'Download' and 'Print'.

Complete this field with a name or ENR no. to find a candidate.

Click 'Search'

You can also Download the report or print the report

# EQA08: TRAFFIC REPORTS

- 1 - Put a name or number in the Find field.
- 2 - You will see how many matches have been found
- 3 - Click next to move to the next candidate found

Candidates Results - SAP NetWeaver Portal

Find:  Previous Next Options 1 match

**City & Guilds** Walled Garden Help | Personalize |

Home Catalogue/Shop **Quality**

Quality System | Online Forms | **Candidates/Results** | QMS CGLI History Back

Your search results

Order code	Description
6302-04	Level 4 Preparing to Teach in the Lifelo

Candidate List

ENR no.	ULN	First Name	Middle Name	Last Name	DOB	Gender	Registration Date	Registration Expiry Date	Merged to	Merged Date
VBB4623	4484848278	Linsey				F	15.10.2012	15.10.2013		
UG7277	7296935986	Craig				M	22.11.2012	22.11.2013		
ZVT1299	6898608060	<span style="border: 1px solid black; padding: 1px;">Karen</span>	Marie			F	15.10.2012	15.10.2013		
ZVT1240	7831486703	Anna-Marie				F	15.10.2012	15.10.2013		
EGA0628	5106666219	Deborah	Louise			F	15.10.2012	15.10.2013		

Download
Print



**EQA09**

**ACTION PLANNING**

# EQA09: ACTION PLANNING IN THE CAR

## Section 2 Previous Action Plan

Select from the drop down box

Has the previous action plan been met by the centre?	Yes
	Please select
	Yes
Comments	No
	N/A

Previous report 80000\_ \_ \_ \_ **MUST** always be recorded if an action plan was in place

Yes - comment to say what has been completed  
 No - comment on what has not been met  
     - set a new action  
     - increase the risk level  
 N/A - comment to say no previous action in place

'To Be Checked by' should only be populated with the name of the 'Quality Coordinator' or 'External Quality Assurer'

## Section 4 Action/Improvement Plan

Delete?	Date set (dd.mm.yyyy)	Action/Improvement Point	Level of risk	By whom	By when (dd.mm.yyyy)	Date completed (dd.mm.yyyy)	* To be checked by (mandatory field)
<input type="checkbox"/>	11.10.2013	A - Complete a CU form and send into the local office (OQAR 6c)	Low	Lead IQA	12.11.2013		EQA
<input type="checkbox"/>	11.10.2013	I - Update terminology in documents IV - IQA, EV - EQA and APL to RPL	Please select High Medium Low	Lead IQA	12.11.2013		EQA

Select the appropriate risk level for the action or improvement point

For action points they must align to Our Quality Assurance Requirements (OQAR)

Remember the risk level which is indicated by the OQAR reference may not be the risk level applied to the qualifications sampled depending on evidence seen. Where this occurs justification must be provided within the report

**EQA 10**

**ONLINE EXPENSES**

# EQA 10: ONLINE EXPENSES

## OVERVIEW

This section of the guide will show you how to manage your expense claims on Walled Garden. Here is a detail of what you will find in the following pages.

### **1 – SUBMITTING A CLAIM**

How to submit expenses for the Quality teams to process.

### **2 – VIEWING OUTSTANDING CLAIMS**

How to view a list of submitted expenses that have not yet been processed by the Quality Teams.

### **3 – AMENDING AND RESUBMITTING A CLAIM**

How to amend and resubmit, or delete a claim before it has been processed by the Quality Teams.

### **4 – VIEWING PROCESSED CLAIMS**

How to view a list of expenses that have been processed by the Quality Teams, and whether they have been approved or rejected.

# EQA10: ONLINE EXPENSES

## 1/10 SUBMITTING A CLAIM

Home Catalogue/Shop **Quality** 1  
Quality System Online Forms Candidates/Results QMS CGLI 2

**Search**

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

Show me:  3

For Awarding org:


For period \*  today 4

Or From \*  To

**Search** 5

<b>1</b>	Select <b>Quality</b>
<b>2</b>	Select <b>Quality System</b>
<b>3</b>	Select <b>Submit Expenses</b> from the 'Show me' dropdown menu
<b>4</b>	Select <b>Today</b> from the 'For period' dropdown menu.
<b>5</b>	Click <b>Search</b>

**Quality System**



**Welcome**

Here you will be able to:

- View your allocated Centres
- View and manage all activities allocated to you
- View and submit your fees and expenses

**Offline Forms**

Offline forms allow you to complete CAR, CAPv and QAPv forms on your hard drive without an internet connection. You will need to install Silverlight (which is available for free on the internet), as well as a bespoke City & Guilds application which can be found [here](#). You will only have to install the software once. Please refer to the user manual for further information.

# EQA 10: ONLINE EXPENSES

## 2/10 SUBMITTING A CLAIM

Welcome Gillian Hanson

City & Guilds Walled Garden

Home Catalogue/Shop Quality

Quality System | Online Forms | Candidates/Results | QMS CGLI

**Search**

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

Show me:

For Awarding org:

For period \*  today   To

For period \*  today  
 today  
 since yesterday  
 last week  
 last month  
 last year

**Submit Expenses**

Consultant/EV	Consultant/EV Name
200949	John Smith

**Expenses Totals**

**Expenses Details**

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	
<input type="checkbox"/>	ACCOMODATION	<input type="text"/>	15.08.2014	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	ACCOMODATION	<input type="text"/>	15.08.2014	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	ACCOMODATION	<input type="text"/>	15.08.2014	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	ACCOMODATION	<input type="text"/>	15.08.2014	<input type="text"/>	<input type="text"/>

This page will open on the right hand side.

1

2

2

If you select a different time period, the screen on the right will populate with any expenses you have previously entered, but have not yet been approved by the Quality Team.

'Expense' field will be pre-populated as shown. You will then be able to select the correct item from the dropdown menu.

'Claim Submission Date' will populate with the date you are entering your expenses.

This section will not populate until expenses have been entered and 'Update Totals' clicked. (See next slides.)

# EQA 10: ONLINE EXPENSES

## 3/10 SUBMITTING A CLAIM

**Submit Expenses**

Consultant/EV	Consultant/EV Name
200949	

Expenses Totals

Expenses Details

The claim submission date will self populate with the date you are entering your expenses

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
<input type="checkbox"/>	ACCOMODATION	8000057321	13.08.2014		One overnight stay approved by territory office	60.00		
<input type="checkbox"/>	MILES	8000057321	13.08.2014		Home address to hotel to centre return journey	95		
<input type="checkbox"/>	CAR PARKING	8000057321	13.08.2014		Pay and display at hotel	10.00		
<input type="checkbox"/>	SUBSISTENCE	8000057321	13.08.2014		Dinner	9.50		

- 1 Select the type of expense you are claiming for from the drop down box.
- 2 Enter the Transaction No.
- 3 Enter a clear description for each item being claimed
- 4 Enter the Amount or number of miles for each item
- 5 You won't be able to edit the following fields. They will self-populate in the next step:
  - Actual visit date
  - Rate (£)
  - Total (£)

Expense

ACCOMODATION

ACCOMODATION

CAR PARKING

MILES

POSTAGE

SUBSISTENCE

TELEPHONE

TRAVEL FARES

OTHER

# EQA10: ONLINE EXPENSES

## 4/10 SUBMITTING A CLAIM

Note that you can enter more than one activity at a time

Expenses Details

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
<input type="checkbox"/>	ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
<input type="checkbox"/>	MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
<input type="checkbox"/>	CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00
<input type="checkbox"/>	SUBSISTENCE	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014		Train from York to Darlington centre visit	15.00		
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014		Mileage from home to York station return	18		

① Select the correct description for each item from the drop down box

② As you enter your expenses click, on '**Update Totals**' at the bottom of the page to refresh your claim totals

③ The following columns will self-populate:

- Actual visit date
- Rate
- Total

Buttons: Delete, Update Totals, Submit Expenses

### PLEASE NOTE

At this stage your expenses will not be saved.



# EQA10: ONLINE EXPENSES

## 5/10 SUBMITTING A CLAIM

This section will also populate when you click 'Update Totals'

The amount for each item will populate in the 'Open Status' column

### Expenses Totals

Activity	Units	Rate	Total Amount	Open Status	Rej. Status	Approved Status
ACCOMODATION	60.00	1.00	60.00	60.00	0.00	0.00
MILES	95.00	0.40	38.00	38.00	0.00	0.00
CAR PARKING	10.00	1.00	10.00	10.00	0.00	0.00
SUBSISTENCE	9.50	1.00	9.50	9.50	0.00	0.00
TRAVEL FARES	33.00	1.00	33.00	33.00	0.00	0.00

### Expenses Details

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
<input type="checkbox"/>	ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
<input type="checkbox"/>	MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
<input type="checkbox"/>	CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00
<input type="checkbox"/>	SUBSISTENCE	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Train from York to Darlington centre visit	15.00	1.00	15.00
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Mileage from home to York station return	18.00	1.00	18.00
<input type="checkbox"/>	ACCOMODATION		13.08.2014					

# EQA 10: ONLINE EXPENSES

## 6/10 SUBMITTING A CLAIM

Expenses Totals

Activity	Units	Rate	Total Amount	Open Status	Rej. Status	Approved Status
ACCOMODATION	60.00	1.00	60.00	60.00	0.00	0.00
MILES	95.00	0.40	38.00	38.00	0.00	0.00
CAR PARKING	10.00	1.00	10.00	10.00	0.00	0.00
SUBSISTENCE	9.50	1.00	9.50	9.50	0.00	0.00
TRAVEL FARES	33.00	1.00	33.00	33.00	0.00	0.00

Expenses Details

Your expenses have been saved successfully 3

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)	Error Message
<input type="checkbox"/>	ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00	Ok
<input type="checkbox"/>	MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00	Ok
<input type="checkbox"/>	CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00	Ok
<input type="checkbox"/>	SUBSISTENCE	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50	Ok
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Train from York to Darlington centre visit	15.00	1.00	15.00	Ok
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Mileage from home to York station return	18.00	1.00	18.00	Ok

1

Click **'Submit Expenses'** at the bottom of the screen to save. This will make the claim available for the Territory Office to process .

2

An additional **Error Message** column will appear on the right, net to the 'Total'. If the claim was submitted successfully, it will say 'OK'. Otherwise, it will display an error message.

3

A **success message** will also appear in red print here, to indicate that the claim was successfully submitted. If there are errors, it will indicate so.

Expenses Details

There are some errors.Please see them in error message column.

2

Error Message
Ok
Ok
Ok
Ok
Ok
Ok

Error Message

Transaction No does not belong
Transaction No does not belong
Transaction No does not belong
Transaction No does not belong

Delete	Update Totals	Submit Expenses
--------	---------------	-----------------

1

## EQA 10: ONLINE EXPENSES

### 7/10 SUBMITTING A CLAIM

Now Complete the **EQA expenses receipt form** available on the website

<http://www.cityandguilds.com/~media/Documents/help/more-help/qc-documents/EQA%20Expenses%20Receipt%20form%20docx.ashx>

Scan all your receipts and email with the expenses receipt form to this mailbox;  
[eqaclaims@cityandguilds.com](mailto:eqaclaims@cityandguilds.com)

#### **Alternatively**

Attach all receipts to the EQA expenses receipt form and post to the Wakefield office (City & Guilds, 4 Red Hall Court, Paragon Business Village, Wakefield, WF1 2UN)

**Please complete  
ONE expenses  
receipt form for each  
Quality team**

# EQA10: ONLINE EXPENSES

## 8/10 VIEWING SUBMITTED CLAIMS

- 1 Select **Submitted Expenses** from the drop down box
- 2 Select a **date range or period** – this selection selects the Claim Submission date NOT the Actual visit date
- 3 Click **'Search'**
- 4 These columns will be after the **'Totals'** column – you will see which claims and been approved, if any have been rejected and a reason in the LO note column

**Search**

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

Show me: Submit Expenses ▼

For Awarding org City & Guilds ▼

For period \*  last month ▼

today  
 since yesterday  
 last week  
last month  
 last year

Or From \*  5

**Search**

1

2

3

### Expenses Totals

Activity	Units	Rate	Total Amount	Open Status
ACCOMODATION	60.00	1.00	60.00	0.00
MILES	95.00	0.40	38.00	0.00
CAR PARKING	10.00	1.00	10.00	0.00
SUBSISTENCE	9.50	1.00	9.50	0.00
			0.00	9.50

### Expenses Details

Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00

4

Status	Receipts Received	LO Notes
Approve	<input checked="" type="checkbox"/>	
Approve	<input type="checkbox"/>	
Reject	<input type="checkbox"/>	No receipt
Approve	<input checked="" type="checkbox"/>	

# EQA10: ONLINE EXPENSES

## 9/10 AMENDING AND SUBMITTING A CLAIM

The screenshot shows a web interface for submitting expenses. On the left, there is a search section with a 'Search' button. The search criteria include: 'Show me:' set to 'Submit Expenses', 'For Awarding org' set to 'City & Guilds', 'For period' set to 'last week', and 'Or From' set to '01.09.2014' to '03.09.2015'. A red 'Search' button is at the bottom of this section. On the right, there is a 'Submit Expenses' section with a table for 'Expenses Totals' and 'Expenses Details'. The 'Expenses Totals' table has columns for Activity, Units, Rate, Total Amount, and Open Status. The 'Expenses Details' table has columns for Delete, Expense, Transaction No, and Claim Submission Date. A red 'Delete' button is at the bottom of the 'Expenses Details' table.

Submit Expenses	
Consultant/EV	Consultant/EV Name

Expenses Totals				
Activity	Units	Rate	Total Amount	Open Status
MILES	234.00	0.40	93.60	93.60

Expenses Details			
Delete	Expense	Transaction No	Claim Submission Date
<input checked="" type="checkbox"/>	MILES	8000112309	03.09.2015
<input type="checkbox"/>	ACCOMMODATION		03.09.2015
<input type="checkbox"/>	ACCOMMODATION		03.09.2015

- 1 Select **Submitted Expenses** from the drop down box
- 2 Select a **date range** – this selection selects the Claim Submission date NOT the Actual visit date
- 3 Click '**Search**'
- 4 To delete an entry tick the '**delete**' box next to the expense line
- 5 Click '**delete**' at the bottom of the claim screen
- 6 You will then see a pop box asking you to confirm deletion

A red button labeled 'Delete' is shown at the bottom of the claim screen.

The page at <https://wdc.walled-garden.com> says:  
Please confirm the deletion of selected line(s)

OK Cancel

# EQA10: ONLINE EXPENSES

## 10/10 VIEWING PROCESSED CLAIMS

- 1 Select **My Processed Expenses** from the drop down box
- 2 Select a **date range** – this selection selects the Claim Submission date NOT the Actual visit date
- 3 Click '**Search**'
- 4 These columns will be after the '**Totals**' column – you will see which claims and been approved, if any have been rejected and a reason in the LO note column

Search

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

Show me: Processed Expenses 1

For Awarding org: City & Guilds 2

For period \*  last year 3

Or From \*  To

Search

### Expenses Totals

Activity	Units	Rate	Total Amount	Open Status	Rej. Status
ACCOMODATION	60.00	1.00	60.00	0.00	0.00
MILES	95.00	0.40	38.00	0.00	0.00
CAR PARKING	10.00	1.00	10.00	0.00	10.00
SUBSISTENCE	9.50	1.00	9.50	0.00	0.00

### Expenses Details

Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00

These are all your expense claims processed by a Quality Team, submitted in the selected period. You can see if they have been approved/rejected (Status) and any notes the Office may have made.

4

Status	Receipts Received	LO Notes
Approve	✓	
Approve	□	
Reject	□	No receipt
Approve	✓	