Walled Garden

Quality portal user guide

January 2019
# Quality Portal

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Quality Portal

1. What is the quality portal?

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

In the Quality Portal you can:

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

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

2. Logging in

1. Go to www.walledgarden.com

2. Enter your Walled Garden username and password. Don’t forget to tick the Terms & Conditions box.

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

3. Welcome page

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

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

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

Choose My Approval Applications

Choose a centre number from dropdown menu. This only applies if you have access to multiple centre numbers or satellite sites

Specify a time period for the date when the application form was submitted

Keep ‘City & Guilds’ selected (only change this if you work with ILM).

Click Search

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

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

Note: This screen will only show applications submitted from 01.09.2013 onwards.
### My Approval Applications

<table>
<thead>
<tr>
<th>Centre</th>
<th>Ref No.</th>
<th>Submission Date</th>
<th>Type</th>
<th>Qualification No.</th>
<th>Qualification Description</th>
<th>Status</th>
<th>Ref No.</th>
<th>Status</th>
<th>Planned Visit date</th>
<th>Actual Visit date</th>
<th>Report submitted date</th>
</tr>
</thead>
<tbody>
<tr>
<td>016431</td>
<td>0040007480</td>
<td>11.06.2014</td>
<td>QAP</td>
<td>6502-97</td>
<td>Level 5 Diploma in Education and Training (unit route)</td>
<td>Approval visit in progress</td>
<td>00000067062</td>
<td>Visit Scheduled</td>
<td>15.08.2014</td>
<td>20.08.2014</td>
<td>08.08.2014</td>
</tr>
<tr>
<td>016431</td>
<td>0040007490</td>
<td>11.06.2014</td>
<td>QAP</td>
<td>6502-51</td>
<td>Level 5 Diploma in Teaching English, Literacy</td>
<td>Application received</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>016431</td>
<td>0040007491</td>
<td>11.06.2014</td>
<td>CAP</td>
<td>0500-02</td>
<td>Level 2 NVQ Certificate in Wall and Floor Tiling (Construction)</td>
<td>Application stopped</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

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

The date when you submitted your application

The qualification you applied for

The reference number for the approval activity (if applicable). Click to open the Qualification Approval report (QAPv) (See Online Forms section for details)

Date initially suggested by the Quality Team

Date agreed between you and the EQA

The reference number for your application. Quote if you need to contact us. Click to open the application form you submitted (See Online Forms section for details)

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

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

The status of the approval activity (if required) (See next pages for an explanation of each status)

Date when the QAPv was submitted
## Your approval or EPA application status

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

<table>
<thead>
<tr>
<th>Application status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application received</td>
<td>We have received your application, but we have not started to process it yet</td>
</tr>
<tr>
<td>Approval visit in progress</td>
<td>A Centre/qualification approval visit or remote approval activity is being arranged/carried out</td>
</tr>
<tr>
<td>Application processed (only for qualification approvals)</td>
<td>Your qualification approval application has been processed. Please note this could either be approved or rejected. The Quality team will be in touch with you to inform you of the outcome</td>
</tr>
<tr>
<td>EPA Approved</td>
<td>Your EPA application has been processed successfully</td>
</tr>
<tr>
<td>Application stopped</td>
<td>Your application has been stopped by us, or at your request</td>
</tr>
<tr>
<td>Application on hold</td>
<td>Your application has been put on hold by us, or at your request</td>
</tr>
<tr>
<td>Credit check in progress (only for Centre approvals and EPA)</td>
<td>Our Finance department is completing the credit check and processing the payment of your Centre approval fee (fee not applicable to EPA)</td>
</tr>
<tr>
<td>Credit check approved / rejected (only for Centre approvals and EPA)</td>
<td>Your credit check has been successful. The Quality team will allocate an EQA to organise an approval activity (activity not applicable to EPA)</td>
</tr>
<tr>
<td>Credit check rejected (only for Centre approvals and EPA)</td>
<td>Your credit check has been unsuccessful. The Quality or EPA Applications team will be in touch with details of how to proceed</td>
</tr>
</tbody>
</table>
Your approval activity status (not applicable to EPA)

Not every qualification approval application will require an approval activity. If it does, it can be either a visit or a remote activity. EPA will never have an approval activity. If we do organise an activity, it will be identified on the table with a reference number (800xxxxxxx). The status of the activity will be displayed as follows:

<table>
<thead>
<tr>
<th>Application status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centre application approved / rejected (only for Centre Approvals)</td>
<td>Your Centre approval application has been approved / rejected</td>
</tr>
<tr>
<td>Rejected</td>
<td>Your EPA application has been rejected. The EPA Applications team will be in touch with you with details of how to proceed</td>
</tr>
<tr>
<td>Consultant/EV assigned</td>
<td>An EQA has been allocated, and they will contact you to schedule a date</td>
</tr>
<tr>
<td>Visit Scheduled</td>
<td>You have agreed a activity date with the EQA</td>
</tr>
<tr>
<td>Consultant/EV Report submitted</td>
<td>The qualification approval report (QAPv) is ready to view</td>
</tr>
<tr>
<td>Consultant/EV Reallocation</td>
<td>Occasionally, we may need to reallocate an activity to a different EQA. If that happens, you may see this status temporarily</td>
</tr>
</tbody>
</table>
Choose My Qualifications

2. Choose centre number from dropdown menu. This only applies if you have access to multiple centre numbers or satellites sites.

3. Keep 'City & Guilds' selected (only change this if you work with ILM)

4. Click Search

View details of your approved qualifications. Use the scroll bar along the right-hand side of the table to move down the list.

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

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

Click to download the list of qualifications and EPA in MS Excel format.
Quality Portal

5. My qualifications and EPA

Qualification or EPA details

Last Registration and Last Certification date, according to our Catalogue

Date when your application was successful

Your approval status for this qualification

(See next page for an explanation of each status)
## Quality Portal

5. My qualifications and EPA

Your qualification approval and EPA status

This table lists the different statuses for your Qualification Approvals and EPA and what they mean to you.

<table>
<thead>
<tr>
<th>Approval status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low (Full Approval)</td>
<td>You can register and certificate for this qualification, or make EPA registrations and bookings (EPA will always be on this status)</td>
</tr>
<tr>
<td>Medium (Registration only)</td>
<td>You can register, but you cannot certificate for this qualification</td>
</tr>
<tr>
<td>High (No Registration or Certification)</td>
<td>You can neither register nor certificate for this qualification</td>
</tr>
<tr>
<td>Qualification Approval Rejected</td>
<td>Your qualification approval application was unsuccessful, and you have not been approved to run this qualification</td>
</tr>
<tr>
<td>Approval withdrawn</td>
<td>Your approval has been withdrawn by the Quality Team</td>
</tr>
<tr>
<td>Application withdrawn</td>
<td>You have told us you no longer want to go ahead with your approval application</td>
</tr>
<tr>
<td>Approval lapsed (no activity)</td>
<td>There have been no registrations/certifications on this qualification for two years, so your approval has expired. You need to contact the Quality Team to discuss how to reactivate it if you wish to do so</td>
</tr>
</tbody>
</table>
Quality Portal
6. My quality assurance activities

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

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

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

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

#### 6. My quality assurance activities

<table>
<thead>
<tr>
<th>Centre number for which the activity was scheduled</th>
<th>Reference number for the activity</th>
<th>Brief description of the activity, as entered by the Quality Team</th>
<th>Date suggested by the Quality Team</th>
<th>Date agreed between you and the EQA</th>
<th>Date the CAR was submitted</th>
</tr>
</thead>
</table>

- Click to add a note or attachment. Please note that these will be visible to the Quality Team, but not to your EQA. Please note: do not use this function to add attachments to the CA2. This functionality is within the form itself.
- Click to open the CA2, PA1 or CAR related to the activity.
- (See Online Forms section for details.)
- The status of this activity. (See next page for details.)
### Quality Portal

6. My quality assurance activities

#### Activity status

This table lists the different statuses for your Activities and what they mean to you.

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

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

View details of any Centre Update forms you have submitted

A list of your submitted Centre Updates will appear here
See next page for an explanation of the content of each column
## Quality Portal

### 7. My centre updates

![Quality Portal screenshot](image)

**My Centre Updates**

<table>
<thead>
<tr>
<th>Transaction ID</th>
<th>Description</th>
<th>Current Status</th>
<th>Submission Date</th>
<th>Centre</th>
</tr>
</thead>
<tbody>
<tr>
<td>0600000541</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>20.06.2013</td>
<td>145789</td>
</tr>
<tr>
<td>0600000515</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>25.06.2013</td>
<td>145789</td>
</tr>
<tr>
<td>0600000499</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Update Complete</td>
<td>19.06.2013</td>
<td>145789</td>
</tr>
<tr>
<td>0600000540</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>19.06.2013</td>
<td>145789</td>
</tr>
<tr>
<td>0600000514</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>24.06.2013</td>
<td>145789</td>
</tr>
</tbody>
</table>

- **The centre number for which you submitted the update**
- **The reference number for your centre update. Click to open the submitted form**
  - *(See Online Forms section for details)*
- **Standard (system generated) description**
- **The date when you submitted your update**
- **The status of the update. Options are:**
  - Being Processed
  - Update Complete
## Quality Portal

### 8. Online forms

Access online forms

<table>
<thead>
<tr>
<th>Method 1</th>
<th>Method 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click on the reference number for an activity, approval visit or remote activity, CAP / QAP application or submitted Centre Update.</td>
<td>Click on the Online Forms tab. Use this method for:</td>
</tr>
<tr>
<td>This method is <strong>recommended in most cases</strong>.</td>
<td>• Submitting a CAP / QAP</td>
</tr>
<tr>
<td>'Online Forms' will appear on the right-hand side of the screen.</td>
<td>• Submitting an EPA application</td>
</tr>
<tr>
<td>The Reference No and form type will be pre-populated.</td>
<td>• Submitting a Centre Update</td>
</tr>
</tbody>
</table>

© City & Guilds
## Quality Portal

### 8. Online forms

#### Create / change / display

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

Choose an action, depending on what you want to do. The actions available to you will depend on the form type you’ve chosen, and your level of access.

See table on the right for details.
Create / change / display

Click here to hide/display the search fields. This will allow you to maximise the width of your screen to display the form.

The selected form will appear on this side of the screen.
Quality Portal
8. Online forms

Save / submit / print

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

See table on next page for details.
## Quality Portal
### 8. Online forms

### Save / Submit / Print

| **Save** | Use this button to save the form you’ve been working on, without submitting it. This allows you to come back to it at a later stage to continue working on it.  

We **strongly encourage you to save as you go along**, to ensure you don’t lose any data.  

Whenever you save the form, you will see a confirmation message like the one on the right. Re-open the form in ‘Change’ mode and continue working on it.  

Please note, the **Save** button will not be available if you open the form in ‘Display’ mode. |
|---|---|

| **Submit** | Use this button when you are ready to submit the form. **Forms can only be submitted once.**  

If the form was submitted successfully, you will see a confirmation page like the one on the right, with a brief description of what to do/expect next.  

If you **do not see** the confirmation screen, it means the form has not been submitted. Scroll through the form to find **errors highlighted in red print**. Make the necessary changes, and try to submit again. |
|---|---|

| **Print** | Use this button to print a copy of the form at any time. **Remember always to set paper orientation to landscape, in order fit the whole form on the page.**  

You can print to a printer, or you can create an electronic copy (e.g. PDF/Microsoft XPS) |
|---|---|
Example 1: submitting a QAP form (1/2)

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

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

**Your form has been submitted**

**What happens next**

*Your managing office/quality manager will process your request and contact you shortly.*

**IMPORTANT**

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

You can save the form and return to it later to complete it, but other users will not be able to start working on a new QAP form until you submit yours.
Example 2: Viewing a submitted qualification approval (QAP) form – (1/3)

1. Go to My Approval Applications and search

2. Locate the approval application form you wish to display and click on the reference number (400)

*Please note that there will be one line for each qualification included in the application, all with the same reference number (400)*
Example 2: Viewing a submitted qualification approval (QAP) form – (2/3)

1. The Online Forms screen will open on the right-hand side.
2. The reference number for the application and the centre number will be prepopulated.
3. The form type Qualification Approval will be pre-selected.
4. Click Display
Example 2: Viewing a submitted qualification approval (QAP) form – (3/3)

The form will display on the right hand side of the screen, in read-only mode. You can scroll down and click ‘Print’, if you wish to print a copy.
Example 3: Viewing a qualification approval report (QAPV) – (1/3)

Go to My Approval Applications and search

2. Locate the approval activity for which you wish to view the QAPV form and click on the reference number. The activity has to be at status 'Consultant/EV Report Submitted'.

*Please note that there will be one line for each qualification covered by the approval activity, all with the same reference number (800).*
Example 3: Viewing a qualification approval report (QAPV) - (2/3)

3. The Online Forms screen will open on the right-hand side.

4. The reference number for the activity and the centre number will be prepopulated.

5. The form type QAPV only will be pre-selected.

6. Click Display.
**Example 3: Viewing a qualification approval report (QAPV) - (3/3)**

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

Click on **Search** to leave the form and go back to the list of approval activities.
Example 4: submitting a CA2 form - (1/5)

1. Go to My Quality Assurance Activities and search
2. Locate the activity for which you wish to submit a CA2 form and click on the reference number

The activity has to be at ‘CA1 received’ status.
The Online Forms screen will open on the right-hand side.

The reference number for the activity and the centre number will be prepopulated.

Select the form type ‘Sampling Form CA2’.

Click Create.
Example 4: submitting a CA2 form - (3/5)

This information will prepopulate

Tick as appropriate

Attach required documents (one per field)

For the last item (list of registered/certificated learners), you have the option of including an attachment here or using the tables provided further down (see next page) to download pre-populated learner lists. Either way, you must tick the box to indicate you are supplying the information.
Example 4: submitting a CA2 form - (4/5)

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

1. Click on the 'Download' button to generate the list in Excel format. This will show all the learners registered and certificated in the last 24 months for each qualification.

2. Save it on a local drive.

3. Complete all columns for all relevant learners. Please include any other active learners that may not be listed here.

4. Upload the list using the 'Upload learners' button for each qualification.

You only need to use these tables if you have not attached your own list of registered/certificated learners as explained in the previous page. If you have, please ignore this section.

Add any other attachments you may wish to include.

Add any other comments you may wish to include.

Save as you go along and submit when the form is ready.
Example 4: submitting a CA2 form - (5/5)

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

What happens next

Your Consultant/EV will now prepare a Plan of Activity form (PA1).
Quality Portal
8. Online forms

Example 5: viewing a plan of activity form (PA1) – (1/3)

1. Go to My Quality Assurance Activities and search

2. Locate the activity for which you wish to view the PA1 form and click on the reference number.

   The activity has to be at ‘PA1 received’ status
Example 5: viewing a plan of activity form (PA1) – (2/3)

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

The Centre Activity Report (CAR) is the report form that is used by your Quality Consultant. Unlike previous single form reports, the CAR has been split into several different forms. The 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.
Example 5: viewing a plan of activity form (PA1) – (3/3)

The form will display on the right hand side of the screen, in read-only mode.

You can scroll down and click 'Print', if you wish to print a copy.

Click on Search to leave the form and go back to the list of activities.
Example 6: viewing a centre activity report (CAR) – (1/3)

1. Go to **My Quality Assurance Activities** and search

2. Locate the activity for which you wish to view the CAR form and click on the reference number

   The activity has to be at ‘Report Completed’ status
Example 6: viewing a centre activity report (CAR) – (2/3)

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

2. **Show me:** My Quality Assurance Activity
3. **For Centre:** All Centres
4. **For period:** Last year
5. **Or From:**
6. **Search**

---

**The Online Forms screen will appear on the right-hand side**

**The reference number for the activity and the centre number will be prepopulated**

**The form type will be pre-selected according to the activity**

**Click Display**
Example 6: viewing a centre activity report (CAR) – (3/3)

### Centre Activity Report

#### Systems Visit

#### Systems Advisory

**Section 1: Contact details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Service Order</td>
<td>8000043992</td>
</tr>
<tr>
<td>1.2 Centre Name</td>
<td>AP College</td>
</tr>
<tr>
<td>1.3 Centre number</td>
<td>145 789</td>
</tr>
<tr>
<td>1.4 Centre contact</td>
<td></td>
</tr>
<tr>
<td>- Title</td>
<td></td>
</tr>
<tr>
<td>- First Name</td>
<td>Melanie</td>
</tr>
<tr>
<td>- Surname</td>
<td>Jones</td>
</tr>
<tr>
<td>- Telephone number</td>
<td>+44 30447</td>
</tr>
<tr>
<td>- Email address</td>
<td><a href="mailto:analia.paddo@cityandguilds.com">analia.paddo@cityandguilds.com</a></td>
</tr>
</tbody>
</table>

**Consultant Name**: J Clark  
**Type of Activity**: Systems Advisory  
**Date of Activity**: 20.06.2013

The form will display on the right hand side of the screen, in read-only mode. You can scroll down and click ‘Print’, if you wish to print a copy (landscape recommended).
Example 7: submitting a centre update form - (1/2)

1. Click on the Online Forms tab
2. Choose form type Centre Update
3. Centre No will be pre-populated, or choose from dropdown menu if you have more than one
4. Click Create
5. Complete the form. Save as you go along. You will see a confirmation message each time you save
6. Submit when the form is ready
Example 7: submitting a centre update form - (2/2)

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

Your form has been submitted

What happens next

Your managing office/customer service co-ordinator will process your request.
Example 8: viewing your submitted centre approval (CAP) form – (1/3)

1. Go to **My Approval Applications** and search

2. Locate the centre approval application (CAP) on the list and click on the reference number (00400xxxxx)

   *Please note that there will be one line for each qualification included in the application, all with the same reference number (00400xxxxx)*
Quality Portal
8. Online forms

Example 8: viewing your submitted centre approval (CAP) form – (2/3)

The Online Forms screen will open on the right-hand side

The reference number for the application and the centre number will be prepopulated

Form type Centre Approval will be pre-selected

Click Display
Example 8: viewing your submitted centre approval (CAP) form – (3/3)

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

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

---

**Centre Approval (CAP)**

**Form CAP / 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.

The manuals detail the Centre Approval Criteria which must be met and lists possible sources of evidence. The Supporting Customer Excellence Centre Manual is linked to our Quality Assurance Requirements and appear in this form where appropriate.

For ILM Centres: Links are made to the ILM Customer Handbook, policies and procedures.

All fields are mandatory unless otherwise stated.

This prospective centre intends to apply for approval and in order to do so, understands that it will need to pay the current City & Guilds/ILM centre approval fee.

*You can save the form throughout completion, by clicking on the save button at the bottom of the form.*

**Section 1  Contact details**

1. Centre name
2. Do you have a company registration number?
   - [ ] Yes
   - [ ] No
   
   If Yes, please enter the number
Quality Portal

9. Activity planner

Screen layout

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

View a list of your planned activities

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

View activities planned in the last six months and for the next 12 months
Quality Portal
9. Activity planner

Activity details - (1/2)

<table>
<thead>
<tr>
<th>Customer number, National Centre Number and Centre Name</th>
<th>Allocated EQA</th>
<th>Qualification number and description</th>
<th>Qualification approval status</th>
<th>Activity type</th>
<th>This is another way to display the activity type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1002425 AP College</td>
<td>145789 J Clerk</td>
<td>2377-12 LEVEL 3 CERTIFICATE FOR THE INSPECTION</td>
<td>Not assigned</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>2377-22 CODE OF PRCT. FOR IN SERVICE INSPECT. ET</td>
<td>3748-01</td>
<td>FUNCTIONAL SKILLS ENGLISH</td>
<td>Low (Full Approval)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7402-01 LEVEL 2 CERTIFICATE FOR LEGAL SECRETARE</td>
<td></td>
<td></td>
<td>Qualification with No Activity</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Continues on next page
Quality Portal
9. Activity planner

Activity details - (2/2)

- **7** Activity description, as entered by the Quality Team. This is the description you will see in ‘My Quality Assurance Activities’
- **8** Indicates whether you will be charged for the activity or not
- **9** Reference number for the activity, as listed in ‘My Quality Assurance Activities’
- **10** The tentative date for when the Quality Team planned the activity. This will be typically the first day of the month
- **11** The actual activity date agreed between you and the EQA. If this is blank, it’s because the date has not been arranged yet
- **12** The date when the report was submitted (if available)
- **13** Please ignore
Quality Portal
Appendix 1: process overview (1/4)

QAP
Qualification approval applications
(when a visit or remote activity is required)

YOU submit a QAP form in the
Walled Garden

WE receive your application

YOU view your approval activity in the
Walled Garden

YOU view the new qualification in the
Walled Garden

WE allocate an EQA to conduct the approval activity

EQA contacts you to agree an activity date

YOU complete action points raised by the QC

WE process the approval report (QAPV)

WE email you to confirm the outcome

Consultant/EV report submitted

Status of your approval application in the Walled Garden

Application received

Approval visit in progress (this status will also display if a remote activity is taking place)

Application processed

Status of your approval activity in the Walled Garden

• Consultant/EV Assigned
• Visit Scheduled

Consultant/EV report submitted

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Quality Portal
Appendix 1: process overview (2/4)

- **YOU** submit an EPA application in the Walled Garden
- **WE** receive your application
- **WE** process your EPA application
- **WE** email you to confirm the outcome
- **YOU** view the new EPA in the Walled Garden

<table>
<thead>
<tr>
<th>Status of your EPA Application in the Walled Garden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application received</td>
</tr>
</tbody>
</table>
## Quality Portal

### Appendix 1: process overview (3/4)

<table>
<thead>
<tr>
<th>External QA sampling activities</th>
<th>Activity planning</th>
<th>Activity</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WE</strong> plan an activity and allocate an EQA</td>
<td><strong>WE</strong> email you a CA1 form confirming the activity</td>
<td><strong>YOU</strong> view your activity in the Walled Garden</td>
<td><strong>EQA</strong> contacts you to agree an activity date</td>
</tr>
<tr>
<td><strong>YOU</strong> view your activity in the Walled Garden</td>
<td><strong>EQA</strong> views the CA2 form in the Walled Garden</td>
<td><strong>YOU</strong> view the PA1 form in the Walled Garden</td>
<td><strong>EQA</strong> submits a PA1 form in the Walled Garden</td>
</tr>
<tr>
<td><strong>EQA</strong> submits a PA1 form in the Walled Garden</td>
<td><strong>YOU</strong> view the PA1 form in the Walled Garden</td>
<td><strong>YOU</strong> complete any action plans required</td>
<td><strong>EQA</strong> submits the activity report (CAR) in the Walled Garden</td>
</tr>
<tr>
<td><strong>YOU</strong> view the CAR in the Walled Garden</td>
<td><strong>YOU</strong> view the qualification status updated in My Qualifications in the Walled Garden</td>
<td><strong>YOU</strong> view the qualification status updated in My Qualifications in the Walled Garden</td>
<td><strong>WE</strong> process the consultant activity report (CAR) and inform you of any changes of status</td>
</tr>
<tr>
<td><strong>YOU</strong> view the qualification status updated in My Qualifications in the Walled Garden</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Status of your Activity in the Walled Garden

- **In process with Consultant**
- **CA1 received**
- **CA2 sent to Consultant**
- **PA1 received**
- **Report in Progress**
- **Report Completed**

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## Quality Portal

### Appendix 1: process overview (4/4)

<table>
<thead>
<tr>
<th>Non-sampling activities</th>
<th>Activity planning</th>
<th>Activity</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WE</strong></td>
<td><strong>EQA</strong> plans an activity and allocates an EQA</td>
<td><strong>EQA</strong> contacts you to agree an activity date</td>
<td><strong>YOU</strong> views your activity in the <strong>Walled Garden</strong></td>
</tr>
<tr>
<td><strong>YOU</strong></td>
<td></td>
<td><strong>EQA</strong> conducts the activity</td>
<td><strong>YOU</strong> views the CAR in the <strong>Walled Garden</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>EQA</strong> submits an activity report (CAR) in the <strong>Walled Garden</strong></td>
<td><strong>YOU</strong> completes any action plans required</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>WE</strong> processes the consultant activity report (CAR)</td>
<td></td>
</tr>
</tbody>
</table>

---

**Status of your Activity in the Walled Garden**

- In process with Consultant
- Visit scheduled
- Report in Progress
- Report Completed
Quality Portal
Appendix 2: quality add on profiles

There are three different add on profiles for the Walled Garden Quality Portal:
• Full Access
• Admin
• Read-only

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

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

<table>
<thead>
<tr>
<th></th>
<th>Full Access</th>
<th>Admin</th>
<th>Read-only</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Approval Applications</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>My Approval Visits</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>My Qualifications</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>My Quality Assurance Activities</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>My Centre Updates</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Online Forms</td>
<td>View all forms. Submit all forms.</td>
<td>View all forms. Submit Centre Update and CA2 forms only.</td>
<td>View all forms. No form submission</td>
</tr>
<tr>
<td>Activity Planner</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>