<table>
<thead>
<tr>
<th>CONTENTS</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What is the Quality Portal?</td>
<td>3</td>
</tr>
<tr>
<td>2. Logging in</td>
<td>4</td>
</tr>
<tr>
<td>3. Welcome page</td>
<td>5</td>
</tr>
<tr>
<td>4. My Approval Applications</td>
<td>6</td>
</tr>
<tr>
<td>5. My Qualifications</td>
<td>10</td>
</tr>
<tr>
<td>6. My Quality Assurance Activities</td>
<td>13</td>
</tr>
<tr>
<td>7. My Centre Updates</td>
<td>16</td>
</tr>
<tr>
<td>8. Online forms and examples</td>
<td>18</td>
</tr>
<tr>
<td>9. Activity Planner</td>
<td>47</td>
</tr>
<tr>
<td>APPENDIX 1: Process overview</td>
<td>50</td>
</tr>
<tr>
<td>APPENDIX 2: Quality add on profiles</td>
<td>53</td>
</tr>
</tbody>
</table>
1. WHAT IS THE QUALITY PORTAL?

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

In the Quality Portal you can:

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

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

1. Go to www.walledgarden.com

2. Enter your Walled Garden user ID and password.

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

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

This dropdown appears when you click on the ‘Centre Portal’ tab at the top.
Choose My Approval Applications.

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

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

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

Click Search.

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

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

Note: This screen will only show applications submitted from 01.09.2013 onwards.
## 4. 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>0040067480</td>
<td>11.08.2014</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>B000077962</td>
<td>Visit Scheduled</td>
<td>15.08.2014</td>
<td>26.08.2014</td>
<td>50.00.0000</td>
</tr>
<tr>
<td>016431</td>
<td>0040067490</td>
<td>11.08.2014</td>
<td>QAP</td>
<td>6503-01</td>
<td>Level 5 Diploma in Teaching English Literacy</td>
<td>Application received</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>016431</td>
<td>0040067491</td>
<td>11.08.2014</td>
<td>CAP</td>
<td>6569-02</td>
<td>Level 2 NVQ Certificate in Wall and Floor Tiling (Construction)</td>
<td>Application stopped</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</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 visit (if applicable).**
- **Click to open the Qualification Approval report (QAPv).**
  
  *(See Online Forms section for details)*
- **The status of the approval visit.**
  
  *(See next pages for an explanation of each status.)*
- **Date initially suggested by the Quality Team.**
- **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 status of your application.**
  
  *(See next pages for an explanation of each status.)*
- **Date agreed between you and the Consultant.**
- **The type of application: Centre Approval (CAP) or Qualification Approval (QAP).**
- **Date when the QAPv was submitted.**
# YOUR APPROVAL APPLICATION STATUS

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

<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>Application stopped</td>
<td>Your Centre/Qualification Approval Application has been stopped by us, or at your request.</td>
</tr>
<tr>
<td>Application on hold</td>
<td>Your Centre/Qualification Approval Application has been put on hold by us, or at your request.</td>
</tr>
<tr>
<td>Credit check in progress (only for Centre Approvals)</td>
<td>Our Finance Department is completing the credit check and processing the payment of your Centre Approval Fee.</td>
</tr>
<tr>
<td>Credit check approved / rejected (only for Centre Approvals)</td>
<td>Your credit check has been successful. The Quality Team will allocate an EQA to organise an approval visit.</td>
</tr>
<tr>
<td>Credit check rejected (only for Centre Approvals)</td>
<td>Your credit check has been unsuccessful. The Quality Team will be in touch with details of how to proceed.</td>
</tr>
<tr>
<td>Centre application approved / rejected (only for Centre Approvals)</td>
<td>Your Centre Approval Application has been approved / rejected.</td>
</tr>
</tbody>
</table>
YOUR APPROVAL VISIT STATUS

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

<table>
<thead>
<tr>
<th>APPLICATION STATUS</th>
<th>MEANING</th>
</tr>
</thead>
<tbody>
<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 visit 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>
5. MY QUALIFICATIONS

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

View 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.

Click to download the list of qualifications in MS Excel format.

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

#### 5. MY QUALIFICATIONS

<table>
<thead>
<tr>
<th>Qualification Details</th>
<th>Last Registration and Last Certification date, according to our Catalogue.</th>
<th>Your approval status for this qualification (See next page for an explanation of each status.)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product Code</strong></td>
<td><strong>Qualification Description</strong></td>
<td><strong>Approved Date</strong></td>
</tr>
</tbody>
</table>

- **Approved Date**: The date you were approved for the qualification.
- **Last Registration Date**: The date the qualification was last registered.
- **Last Certification Date**: The date the qualification was last certified.
- **Consultant/FV Name**: The name of the consultant or FV responsible.
- **Approval Status**: The status of your approval status for this qualification.
YOUR QUALIFICATION APPROVAL STATUS

The table below lists all the different statuses for your Qualification Approvals 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.</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>
6. MY QUALITY ASSURANCE ACTIVITIES

View details of your activities. You can sort the data by clicking on any column header. See next page for an explanation of the content of each column.

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

Click on the reference number to open a form related to each visit. (See Online Forms section for details)
### 6. MY QUALITY ASSURANCE ACTIVITIES

<table>
<thead>
<tr>
<th>Centre Note</th>
<th>Attach Docs</th>
<th>Reference Number</th>
<th>Activity Type</th>
<th>Status</th>
<th>Centre</th>
<th>Planned activity date</th>
<th>Actual activity date</th>
<th>Date Report Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>0000043380</td>
<td>Systems Visit</td>
<td>Visit Scheduled</td>
<td>145789</td>
<td>17.07.2013</td>
<td>24.07.2013</td>
<td>00.00.0000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0000043282</td>
<td>Sampling 2377</td>
<td>CA2 went to Consultant</td>
<td>145789</td>
<td>20.06.2012</td>
<td>21.06.2012</td>
<td>00.00.0000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0000043884</td>
<td>Remote Sampling 74E2</td>
<td>CA2 went to Consultant</td>
<td>145789</td>
<td>12.06.2013</td>
<td>27.06.2013</td>
<td>00.00.0000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0000043991</td>
<td>Generic Advisory Visit</td>
<td>Report Completed</td>
<td>145789</td>
<td>20.06.2013</td>
<td>20.06.2013</td>
<td>20.06.2013</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0000043982</td>
<td>Systems Advisory Visit</td>
<td>Report Completed</td>
<td>145789</td>
<td>08.06.2013</td>
<td>20.06.2013</td>
<td>20.06.2013</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0000043993</td>
<td>Session Prof Recognition Award Monitoring</td>
<td>Report Completed</td>
<td>145789</td>
<td>28.06.2013</td>
<td>20.08.2013</td>
<td>00.00.0000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>0000043994</td>
<td>Standardisation of assessment practice</td>
<td>Visit Scheduled</td>
<td>145789</td>
<td>13.09.2013</td>
<td>20.08.2013</td>
<td>00.00.0000</td>
</tr>
</tbody>
</table>

**Click to add a note or attachment. Please note that these will be visible to the Quality Team, but not to your EQA.**

**Reference number for the activity.**

Click to open the CA2, PA1 or CAR related to the activity.

*(See Online Forms section for details)*

**Brief description of the activity, as entered by the Quality Team**

**Date suggested by the Quality Team**

**Date when the CAR was submitted**

**Date agreed between you and the EQA.**

**The status of this activity (See next page for details.)**

Centre number for which the activity was scheduled.
### ACTIVITY STATUS

The table below lists all 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 (Only applicable to sampling activities)</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. (See Online Forms section for details.)</td>
</tr>
<tr>
<td>CA2 sent to Consultant (Only applicable to sampling activities)</td>
<td>You have submitted a CA2 form. The EQA now needs to submit a PA1 form online.</td>
</tr>
<tr>
<td>PA1 received (Only applicable to sampling activities)</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 (800xxxxxxx). (See Online Forms section for details.)</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 (800xxxxxxx). (See Online Forms section for details.)</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

Choose My Centre Updates

Specify a time period for the date when the update was submitted.

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

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

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.
### 7. MY CENTRE UPDATES

**Table: 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>0000000541</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>20.06.2012</td>
<td>145796</td>
</tr>
<tr>
<td>0000000515</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>25.06.2013</td>
<td>145789</td>
</tr>
<tr>
<td>0000000499</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Update Complete</td>
<td>19.06.2013</td>
<td>145799</td>
</tr>
<tr>
<td>0800000540</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>19.06.2013</td>
<td>145789</td>
</tr>
<tr>
<td>0000000514</td>
<td>CENTRE UPDATE FORM RECEIVED</td>
<td>Being Processed</td>
<td>24.06.2013</td>
<td>145799</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 description**
- **The date when you submitted your update.**
- **The status of the update.** Options are:
  - Being Processed
  - Update Complete
## ACCESS ONLINE FORMS

### METHOD 1

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

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

<table>
<thead>
<tr>
<th>Search</th>
<th>Activity Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show me: My Quality Assurance Activity</td>
<td>Reference Number: 0000343502</td>
</tr>
<tr>
<td>For Centre: All Centres</td>
<td>Systems Visit</td>
</tr>
<tr>
<td>For period: Last year</td>
<td></td>
</tr>
</tbody>
</table>

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

### METHOD 2

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

- Submitting a CAP / QAP
- Submitting a Centre Update

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

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.
The selected form will appear on this side of the screen.

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

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Save** | Use this button to save the form you’ve been working on, without submitting it. This allows you to come back to it at a later stage to continue working on it.  
  - **We strongly encourage you to save as you go along**, to ensure you don’t lose any data.  
  - Whenever you save the form, you will see a confirmation message like the one on the right. Re-open the form in ‘Change’ mode and continue working on it.  
  - Please note, the **Save** button will not be available if you open the form in ‘Display’ mode. |
| **Submit** | Use this button when you are ready to submit the form. **Forms can only be submitted once.**  
  - If the form was submitted successfully, you will see a confirmation page like the one on the right, with a brief description of what to do/expect next.  
  - **If you do not see the confirmation screen, it means the form has not been submitted.** Scroll through the form to find errors highlighted in **red print**. Make the necessary changes, and try to submit again. |
| **Print** | Use this button to print a copy of the form at any time. **Remember to always set paper orientation as landscape, in order fit the whole form on the page.**  
  - You can print to a printer, or you can create an electronic copy (e.g. PDF/Microsoft XPS) |
EXAMPLE 1: SUBMITTING A QAP FORM (1/2)

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

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

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

5. The form type Qualification Approval will be pre-selected.

6. Click Display.
EXAMPLE 2: VIEWING A SUBMITTED QUALIFICATION APPROVAL (QAP) FORM – (3/3)

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

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

---

**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.

All fields are mandatory unless otherwise stated.

**Section 1  Contact details**

1.1 Centre name

AP College

1.2 Centre number

145789

1.3 Centre contact name

Miranda Lang

1.4 Email address*

admin@apcollege.com

1.5 Telephone number*

02072042468

1.6 Website

www.apcollege.com

* Please use the most appropriate contact email address and telephone number for City & Guilds / ILM to use in the event of a query related to this application.
8. ONLINE FORMS

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

Go to My Approval Applications and search.

Locate the approval visit for which you wish to view the QAPv form and click on the reference number. The visit has to be at status ‘Consultant/EV Report Submitted’.

Please note that there will be one line for each qualification covered by the approval visit, all with the same reference number (800).
EXAMPLE 3: VIEWING A QUALIFICATION APPROVAL REPORT (QAPv) – (2/3)

8. ONLINE FORMS

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

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

The form type QAPv only will be preselected.

Click Display.
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 visits.
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.
8. ONLINE FORMS

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

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.
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.

---

**Quality Portal**

### Online Forms

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

Your form has been submitted

What happens next

Your Consultant/EV will now prepare a Plan of Activity form (PA1).
EXAMPLE 5: VIEWING A PLAN OF ACTIVITY FORM (PA1) – (1/3)

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)

8. ONLINE FORMS

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

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

Select form type Sampling Form PA1.

Click Display.

Online Forms allows you to view and submit a range of forms, including qualification assessment.

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)

8. ONLINE FORMS

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

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 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)

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

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

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

6. Click Display.

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.
8. ONLINE FORMS

EXAMPLE 6: VIEWING A CENTRE ACTIVITY REPORT (CAR) – (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 (landscape recommended).

Centre Activity Report

Systems Visit
Systems Advisory

Section 1  Contact details

1.1 Service Order 8000543002

1.2 Centre Name AP College

1.3 Centre number 145789

1.4 Centre contact

- Title

- First name Melanie

- Surname Jones

- Telephone number* 1443047

- Email address* analoa.padin@cityandguilds.com

Consultant Name J Clark

Type of Activity Systems Advisory

Date of Activity (dd.mm.yyyy) 20.06.2012

Click on Search to leave the form and go back to the list of activities.
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) (ONLY IF YOU SUBMITTED IT ONLINE)

Go to My Approval Applications and search.

Locate the centre approval application (CAP) on the list and click on the reference number (400).

*Please note that there will be one line for each qualification included in the application, all with the same reference number (400).*
EXAMPLE 8: VIEWING YOUR SUBMITTED CENTRE APPROVAL (CAP) FORM – (2/3)
(ONLY IF YOU SUBMITTED IT ONLINE)

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.
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 visits.

Section 1  Contact details

1.1 Centre name

1.2 Do you have a company registration number?
   [ ] Yes  [ ] No
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 the next 12 months.
# QUALITY PORTAL

## 9. ACTIVITY PLANNER

### ACTIVITY DETAILS (1/2)

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer number, National Centre Number and Centre Name</td>
<td>Allocated EQA</td>
<td>Qualification number and description</td>
<td>Qualification approval status</td>
<td>Activity type</td>
<td>This is another way to display the activity type</td>
</tr>
</tbody>
</table>

*Continues on next page.*
### ACTIVITY DETAILS (2/2)

<table>
<thead>
<tr>
<th>Centre portal</th>
<th>Activity planner</th>
<th>Online forms</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Description</th>
<th>Visit Chargeable</th>
<th>Transaction No.</th>
<th>Planned Start Date</th>
<th>Actual Visit Start Date</th>
<th>Centre Visit Date</th>
<th>Number of Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>External QA Sampling Visit</td>
<td>SAMPLING 2377</td>
<td>Not Chargeable</td>
<td>80000434582</td>
<td>20.06.2013</td>
<td>21.06.2013</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Qualification Advisory</td>
<td>QUALIFICATION ADVISORY VISIT 4377</td>
<td>Not Chargeable</td>
<td>800004343698</td>
<td>06.03.2013</td>
<td>#</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>External QA Moderation Visit</td>
<td>MODERATION 2740</td>
<td>Not Chargeable</td>
<td>800004343987</td>
<td>02.05.2013</td>
<td>#</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>External QA Remote Sampling Visit</td>
<td>REMOTE SAMPLING 7462</td>
<td>Not Chargeable</td>
<td>800004344694</td>
<td>12.06.2013</td>
<td>27.06.2013</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Employer Systems Monitoring Visit</td>
<td>EMPLOYER SYSTEMS MONITORING VISIT</td>
<td>Not Chargeable</td>
<td>800004343981</td>
<td>13.02.2013</td>
<td>#</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Unannounced Visit</td>
<td>UNANNOUNCED SYSTEMS VISIT</td>
<td>Not Chargeable</td>
<td>800004343986</td>
<td>14.05.2013</td>
<td>#</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Senior Prof Recognition Award Visit</td>
<td>SEND/PROF RECOGNITION AWARD MONITORING</td>
<td>Not Chargeable</td>
<td>800004343993</td>
<td>28.06.2010</td>
<td>20.06.2010</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Generic Advisory Visit</td>
<td>GENERIC ADVISORY VISIT</td>
<td>Not Chargeable</td>
<td>800004343991</td>
<td>28.06.2010</td>
<td>20.06.2010</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Standardisation of Assessment Practice</td>
<td>STANDARDISATION OF ASSESSMENT PRACTICE</td>
<td>Not Chargeable</td>
<td>800004343996</td>
<td>13.09.2010</td>
<td>20.06.2010</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Annual System Visit</td>
<td>SYSTEMS VISIT</td>
<td>Not Chargeable</td>
<td>800004343980</td>
<td>17.02.2013</td>
<td>#</td>
<td>#</td>
<td>1</td>
</tr>
<tr>
<td>Systems Advisory Visit</td>
<td>SYSTEMS ADVISORY VISIT</td>
<td>Not Chargeable</td>
<td>800004343902</td>
<td>08.08.2013</td>
<td>20.06.2013</td>
<td>#</td>
<td>1</td>
</tr>
</tbody>
</table>

**Columns Meanings**

7. **Activity description**, as entered by the Quality Team. This is the description you will see in ‘My Quality Assurance Activities’.

8. **Indicates whether you will be charged for the activity or not.**

9. **Reference number** for the activity, as listed in ‘My Quality Assurance Activities’.

10. **The tentative date** for when the Quality Team planned the activity. This will be typically the first day of the month.

11. **The actual activity date** agreed between you and the EQA. If this is blank, it’s because the date has not been arranged yet.

12. **The date when the report was submitted** (if available).

13. **Please ignore.**
### QUALITY PORTAL

**APPENDIX 1: PROCESS OVERVIEW (1/3)**

#### QAP

- **Qualification Approval Applications**
  - **(when a visit is required)**

<table>
<thead>
<tr>
<th>QAP</th>
<th>Approval Application</th>
<th>Approval Visit</th>
<th>Approval Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>YOU</td>
<td>Submit a QAP form in the Walled Garden</td>
<td>WE Allocate an EQA to conduct the approval visit</td>
<td>EQA Conducts the approval visit</td>
</tr>
<tr>
<td>WE</td>
<td>Receive your application</td>
<td>EQA Contacts you to agree a visit date</td>
<td>EQA Submits QAPv</td>
</tr>
<tr>
<td>YOU</td>
<td>View your approval visit in the Walled Garden</td>
<td>YOU Complete action points raised by the QC</td>
<td>YOU View the new Qualification in the Walled Garden</td>
</tr>
</tbody>
</table>

#### Status of your Approval Application in the Walled Garden
- **Received**
- **Approval visit in progress**
- **Application processed**

#### Status of your Approval Visit in the Walled Garden
- **Consultant/EV Assigned**
- **Visit Scheduled**
- **Consultant/EV report submitted**

© CITY & GUILDS
APPENDIX 1: PROCESS OVERVIEW (2/3)

### External QA Sampling Activities

**WE**
- Plan an Activity and allocate an EQA
- Email you a CA1 form confirming the activity

**YOU**
- View your activity in the Walled Garden

**EQA**
- Contacts you to agree an activity date
- Views CA2 form in the Walled Garden
- Submits a PA1 form in the Walled Garden

**YOU**
- View PA1 form in the Walled Garden
- Complete any action plans required

**EQA**
- Conducts activity
- Submits Activity Report (CAR) in the Walled Garden

**YOU**
- View CAR in the Walled Garden
- View the qualification status updated in My Qualifications in the Walled Garden

---

**Status of your Activity in the Report in Progress**
- In process with Consultant
- Visit scheduled
- CA1 received
- CA2 sent to consultant
- PA1 received
- Report in Progress
- Report Completed

© CITY & GUILDS
Non-sampling activities

<table>
<thead>
<tr>
<th>ACTIVITY PLANNING</th>
<th>ACTIVITY</th>
<th>OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>WE Plan an Activity and allocate an EQA</td>
<td>EQA Contacts you to agree an activity date</td>
<td>If Systems Visit…</td>
</tr>
<tr>
<td>YOU View your activity in the Walled Garden</td>
<td>EQA Sends you a Systems Visit confirmation letter</td>
<td>EQA Conducts activity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>EQA Submits Activity Report (CAR) in the Walled Garden</td>
</tr>
<tr>
<td></td>
<td></td>
<td>YOU Complete any action plans required</td>
</tr>
</tbody>
</table>

Status of your Activity in the Walled Garden

- In process with Consultant
- Visit scheduled
- Report in Progress
- Report Completed
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 centre 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>