

# e-track – Reviews/Assessments

This is a guide showing how reviews and assessments are recorded within e-track



To record a review/assessment on e-track, simply open the planned visit in the diary and work through the tabs within that visit.

In the diary choose the visit that you want to update by clicking on it:

| Type       | Planned Date | Actual Date | Outcome | Assessor        | File |
|------------|--------------|-------------|---------|-----------------|------|
| 1/1        |              |             |         |                 |      |
| Assessment | 28/10/2018   |             |         | Assessor, Arwyn |      |
| Review     | 07/10/2018   |             |         | Assessor, Arwyn |      |
| Assessment | 23/09/2018   |             |         | Assessor, Arwyn |      |
| Review     | 02/09/2018   |             |         | Assessor, Arwyn |      |
| Assessment | 05/08/2018   |             |         | Assessor, Arwyn |      |
| Review     | 08/07/2018   |             |         | Assessor, Arwyn |      |

On the first **Edit Appointment** tab, enter the actual details of the visit i.e. actual date and time, outcome and any notes that are relevant.

**Edit appointment** | Update plan | Add/update evidence | Progress | Notes | Traffic light status: ✔ History

### Appointment

Review

Assessor: Assessor, Arwyn

Planned: 08/07/2018 09:00 to 10:30

Actual: 08/07/2018 09:00 to 11:30

Outcome: Completed

Travel Time: 00:20

Select a template... | Insert

**B I U S x\* Ix** | Format | Font | A- |

Lizzie has had a week off as she has been moving house but it all went well and is settled now.

She has also been shadowing one of her colleagues one day a week in order to up-skill with a view to taking on some extra responsibilities.

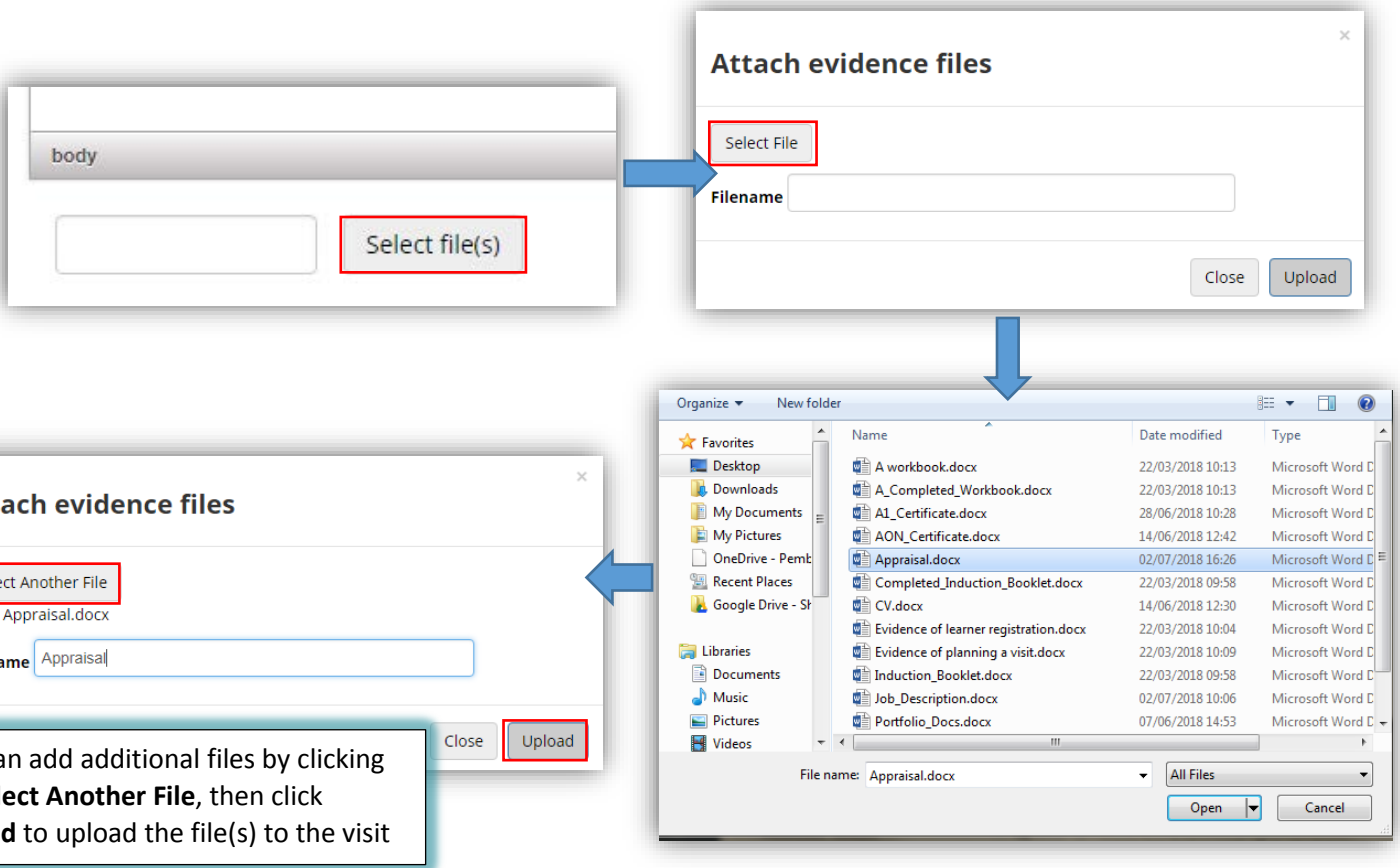
She had her appraisal with her manager last week as well and it went really well. She had a lot of positive comments and has some challenging, yet exciting, objectives set for the coming year.

body

Select file(s)

You can also attach a file that may be relevant to the learner's programme or progress but not necessarily required as part of the portfolio evidence.

Click **Select file(s)** and browse for the file



Click on the **Update Plan** tab

Here you can update the **Learning and Assessment Plan** by setting SMART unit specific targets and updating the progress made towards these targets. You can tick the **Show Completed Items** box to show previous targets which have since been marked as completed

To add a new target click on a unit or click **Add**. In the **Notes** section, add your SMART targets for the learner to complete.

Enter a **Target date** that the learner should complete this by. Click **Save** to save it to the plan.

Learners will be able to go into a visit within e-track and view their Learning and Assessment Plan and the targets that sit within it.

**Learning and Assessment Plan**  Show Completed Items **Add**

City & Guilds Level 2 Diploma in Health and Social Care (Adults) for Wales and Northern Ireland (QCF)  
Unit 201 – Unit 201 - Introduction to communication in health, social care or children's and young people's settings

To add plan entries, select a unit, plan type and set a target date.

Unit: Unit 201 - Introduction to communication in heal

Type:

Notes: List the methods of communication used within your role along with the advantages and disadvantages of each one. Give your preferred method of communication and explain your reasons for this.

Target date: 31/08/2018

Completed? **More...** **Save** **Cancel**

To update the progress within a target click on the target itself. Click **More** to expand the target details.

Unit 205 – Unit 205 - Principles of safeguarding and protection in health and social care  
None

Created on 12 Jul 2018 Target date: 31/07/2018

Unit: City & Guilds Level 2 Diploma in Health and Social

Type:

Notes: Explain the principles of safeguarding and how this impacts on your job role. It is expected that this would be completed in around 500 words.

**More...**  Completed? **Save** **Cancel** **Delete**

You can update the **Status** to reflect when/if the learner has made any progress towards this plan and any necessary **Progress Notes**.

If the plan has been completed you can tick the **Completed** box, or if there is still work to be completed, you can revise the target date.

Click **Save** to save your changes.

## Learning and Assessment Plan Show Completed Items Add

City & Guilds Level 2 Diploma in Health and Social Care (Adults) for Wales and Northern Ireland (QCF)

None

Created on 12 Jul 2018 Target date 31/07/2018

Unit: City & Guilds Level 2 Diploma in Health and Social

Type:

Notes: Explain the principles of safeguarding and how this impacts on your job role. It is expected that this would be completed in around 500 words.

Status: Progress Since Last Visit

Progress Notes: Lizzie has completed this really well and covered all that is required

Completed? Save Cancel

You can repeat this for as many plans/targets as necessary

Click on the **Add/Update Evidence** tab to upload evidence that the learners has provided to you or that you have gathered during the visit. Click on **Click to attach evidence**

Edit appointment
Update plan
Add/update evidence
Progress
Notes
Traffic light status: ✔ History

### Evidence

Apply Template File -1 \*\*

Evidence not attached. Click to attach evidence.

City & Guilds Level 2 Diploma in Health and Social Care (Adults) for Wales and Northern Ireland (QCF)

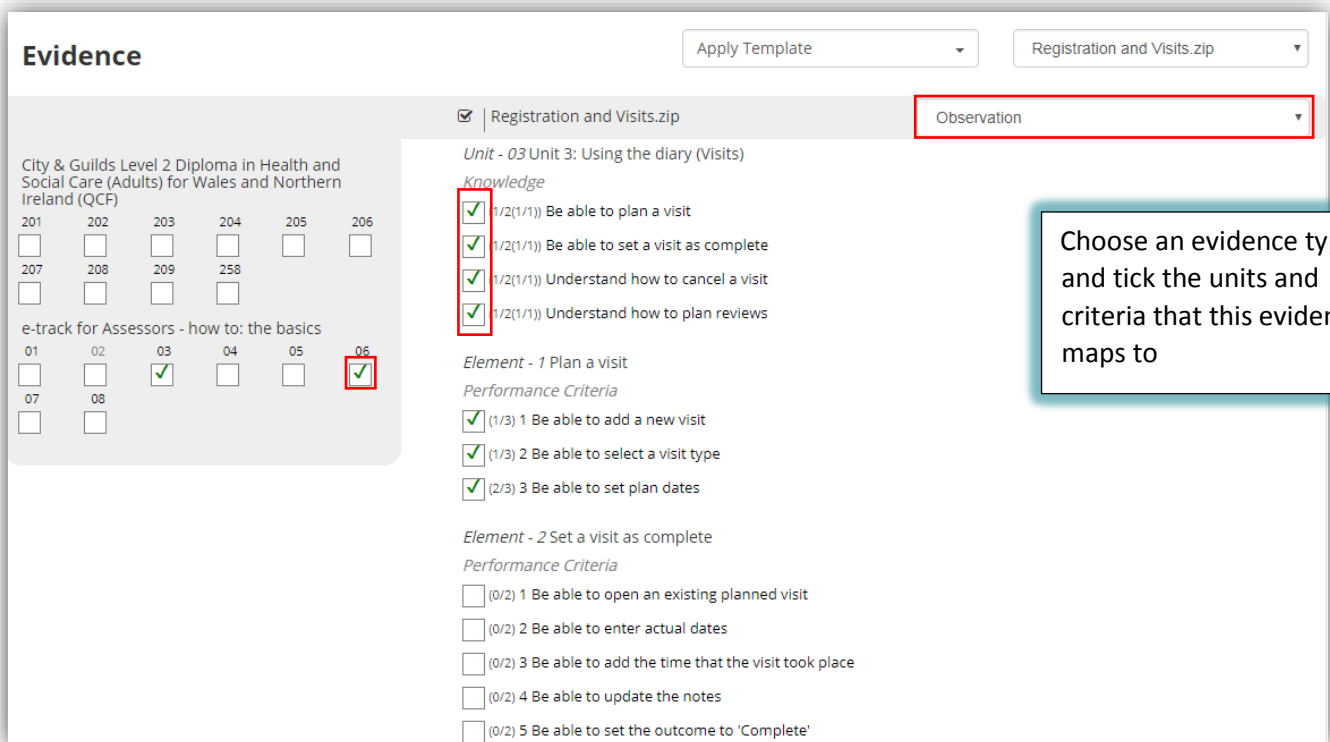
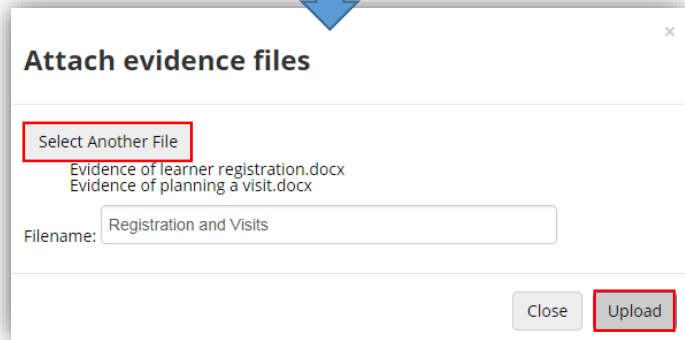
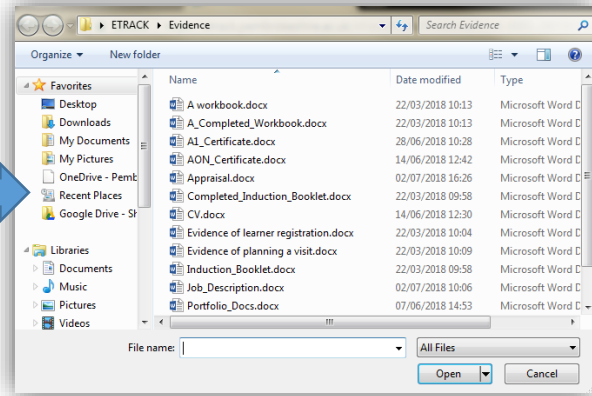
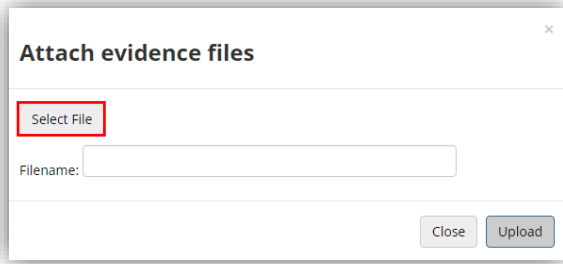
|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 201                      | 202                      | 203                      | 204                      | 205                      | 206                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 207                      | 208                      | 209                      | 258                      |                          |                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                          |                          |

e-track for Assessors - how to: the basics

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 01                       | 02                       | 03                       | 04                       | 05                       | 06                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 07                       | 08                       |                          |                          |                          |                          |
| <input type="checkbox"/> | <input type="checkbox"/> |                          |                          |                          |                          |

Please select at least one unit

Click **Select File** and browse for the file you want.



**Evidence** Apply Template Registration and Visits.zip

| Registration and Visits.zip Observation

City & Guilds Level 2 Diploma in Health and Social Care (Adults) for Wales and Northern Ireland (QCF)

|                          |                          |                          |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 201                      | 202                      | 203                      | 204                      | 205                      | 206                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 207                      | 208                      | 209                      | 258                      |                          |                          |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                          |                          |

e-track for Assessors - how to: the basics

|                          |                          |                                     |                          |                          |                                     |
|--------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|
| 01                       | 02                       | 03                                  | 04                       | 05                       | 06                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 07                       | 08                       |                                     |                          |                          |                                     |
| <input type="checkbox"/> | <input type="checkbox"/> |                                     |                          |                          |                                     |

**Unit - 03 Unit 3: Using the diary (Visits)**

**Knowledge**

- 1/2(1/1) Be able to plan a visit
- 1/2(1/1) Be able to set a visit as complete
- 1/2(1/1) Understand how to cancel a visit
- 1/2(1/1) Understand how to plan reviews

**Element - 1 Plan a visit**

**Performance Criteria**

- (1/3) 1 Be able to add a new visit
- (1/3) 2 Be able to select a visit type
- (2/3) 3 Be able to set plan dates

**Element - 2 Set a visit as complete**

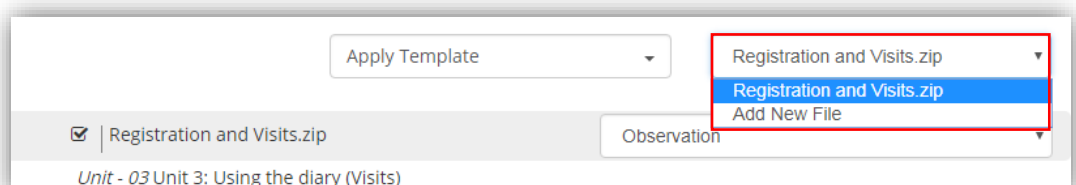
**Performance Criteria**

- (0/2) 1 Be able to open an existing planned visit
- (0/2) 2 Be able to enter actual dates
- (0/2) 3 Be able to add the time that the visit took place
- (0/2) 4 Be able to update the notes
- (0/2) 5 Be able to set the outcome to 'Complete'

Choose an evidence type and tick the units and criteria that this evidence maps to

You can add another file by selecting **Add New File** in the drop down menu and repeat this process as many times as necessary.

When you have finished adding evidence, click **Save** to save your changes.



By clicking on the **Progress** tab you can review how the evidence that you have uploaded today has affected the learner's progress and **Projected Completion Date**.

**Framework Progress : 27.84%**

|       |                       |
|-------|-----------------------|
| 0.0%  | Completed             |
| 5.2%  | Completed Awaiting IV |
| 22.6% | Evidence Gathered     |
| 5.3%  | In progress           |
| 0.7%  | Overdue               |
| 66.1% | Not started           |

|                           |               |
|---------------------------|---------------|
| Framework Start Date      | 01 March 2018 |
| Expected Completion Date  | 31 July 2018  |
| Funding Expiry Date       |               |
| Expected Progress         | 14.23%        |
| Projected Completion Date | 17 May 2018   |
| Framework Completion Date |               |
| Credit Value              | 26            |

You can then click the **Notes** tab and then **Learner Feedback** to provide the learner with feedback. This feedback will appear on their home page.

**Notes**

View by: Note Type [Add] [Advanced]

**Learner Feedback**

Type: Learner Feedback File: [Select file]

Notes: [Insert] Date: 13/07/2018

Great review today Lizzie! You have produced a lot of work and have ticked off lots of criteria. Can you let me know how you feel it's going? Have a look at the attached workbook and complete the first 4 tasks. You can either send it back to me via e-track or we'll catch up about it when I next see you. Keep it up!

Send web message?  Attach file  Require follow up within 3 days

[Save] [Cancel]

You can tick the **Send web message** box to also send this feedback in the form of an e-track message

Ticking the **Require follow up within** box will encourage them to reply to you within a certain amount of time

To attach files to the feedback, for example if you want to send your learner a workbook to complete, tick the **Attach file** box and then **Select file**. Browse for the file and attach it. Click **Save** to save your visit

**Notes**

View by: Note Type [Add] [Advanced]

**Learner Feedback**

Type: Learner Feedback File: [Select file]

Notes: [Insert] Date: 13/07/2018

Great review today Lizzie! You have produced a lot of work and have ticked off lots of criteria. Can you let me know how you feel it's going? Have a look at the attached workbook and complete the first 4 tasks. You can either send it back to me via e-track or we'll catch up about it when I next see you. Keep it up!

Send web message?  **Attach file**  Require follow up within 3 days

[Save] [Cancel]