

Preparing for a Remote Review

Version 2 July 2021



How to prepare for your remote review

We want your remote review to be a positive experience therefore to ensure this runs as smoothly and efficiently as possible, we've provided some guidance to assist you.

Approval Review

User Guide to the Approval Report

User Guide to NCFE TQ Provider Approval (TQ Only)

TQ Deliver Staff Qualification and Experience Template (TQ Only)

Annual Monitoring Review (AMR)

AMR Centre Guidance Document

User Guide to the AMR Report

EQA Review

EQA Review Centre Guidance Document

User Guide to the EQA Report

Moderation Review

Moderation Review Centre Guidance Document

User Guide to the Moderation Report

When a review date has been agreed, we will write to you to confirm the date and time of the review and request you complete the centre guidance document. We recommend this is completed as early as possible to state the evidence in place to meet each criterion in the report and where this evidence can be located. Completing this early, ensures you have sufficient time to prepare and prevents delays to your review. We recognise that much of this information does not change, therefore once completed, simply ensure this remains up to date and ready to share year on year.

One week prior to your agreed review date, we require the below information from you, as outlined in our confirmation of review email. If this is not your first review, you should also refer to your previous report via the [portal](#) and ensure any actions have been addressed.

Approval Review

- Completed Approval Review Centre Guidance Document
- TQ Deliver Staff Qualification and Experience Template (TQ Only)



Annual Monitoring Review (AMR)

- Completed AMR Centre Guidance Document
- [Centre feedback document](#)
- Telephone numbers and email addresses of 2 learners and a convenient time to contact them on the date of the review. You should use the [Learner feedback form](#) to provide this information. By completing this form, you are giving permission for learners to be contacted

EQA Review

- Completed EQA Review Centre Guidance Document
- [Completed centre information document](#)
- [Centre feedback document](#)
- Telephone numbers and email addresses of 2 learners and a convenient time to contact them on the date of the review. You should use the [Learner feedback form](#) to provide this information. By completing this form, you are giving permission for learners to be contacted.
- List of learners who have had assessments adapted, where applicable
- [Completed Assessment Tracking document](#) (Functional Skills only) - This document must be completed in full and include all booked assessments i.e. passed/failed/cancelled/expired. You must also read the [Regulations for the Conduct of Controlled Assessment – Functional Skills](#).

Moderation Review

- Completed Moderation Review Centre Guidance Document.

It is important that you are fully prepared for your review and all information is sent within the specified timescales. Any delays or missing evidence may result in:

- a delay to your report
- your review being rescheduled
- actions on your report
- a delay to learner certificates, where applicable
- a cancellation fee.



How to send the information

There are various ways you can share the required information with us. Our preferred methods are outlined below. However, should you wish to use an alternative, please discuss this with us.

Serv-U - NCFE's secure file sharing platform

If using Serv-U we will send you a link to request the files. This link will be password protected and you will be sent the password separately.

Before you start to upload your files, you must ensure you have all the evidence required, as per the above Centre Guidance document and any additional evidence requested from your EQA/Quality Reviewer (QR).

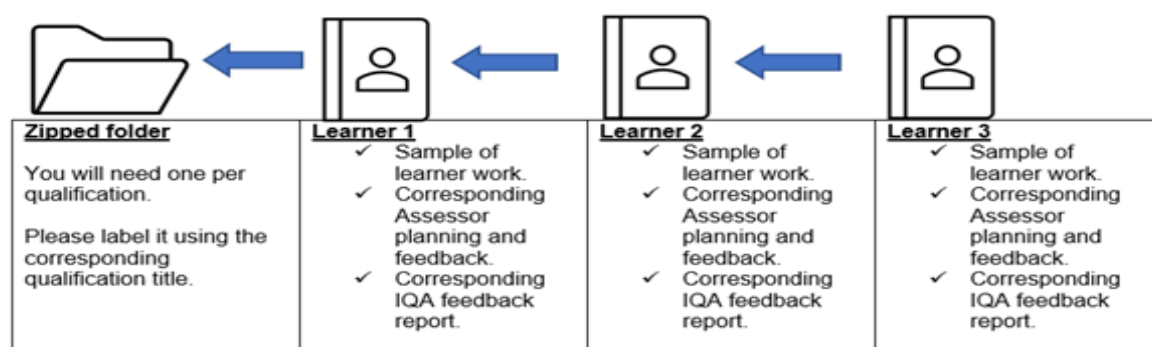
When providing learner evidence, I don't need full portfolios. I will need the following:

- where a qualification is skills and knowledge, I will need one piece of knowledge evidence and one piece of skills evidence per learner. Try to vary assessment methods and units provided across learners requested
- where a qualification involves a research project, please ensure one full research project is within the learner samples provided
- where a qualification requires a longitudinal study, please ensure one full longitudinal study is available for sample
- where a qualification is contains graded unit rather than pass/refer please ensure that all evidence relating to the final grade for that unit is provided and provide a range of units over the learner sample.

To help us to locate the information, you'll need to create separate folders on your computer, as labelled below. Each folder must include the information for each section as specified in the Centre Guidance document.

Files and folders must be:

- clearly labelled, making it clear what the document is, which learner/unit/submission it relates to, where applicable
- uploaded in full, rather than separate pages. Where documents are scanned, the pages must be uploaded the correct way up and must be of good quality
- Zip Folders, this will enable you to upload evidence much quicker. To create a zip folder.



For example - Zipped Folder one will be named with the qualification title – within this please include one folder per learner sample, including sample of learner work along with corresponding Assessor planning and feedback, and IQA feedback.

Approval, EQA and AMR folders

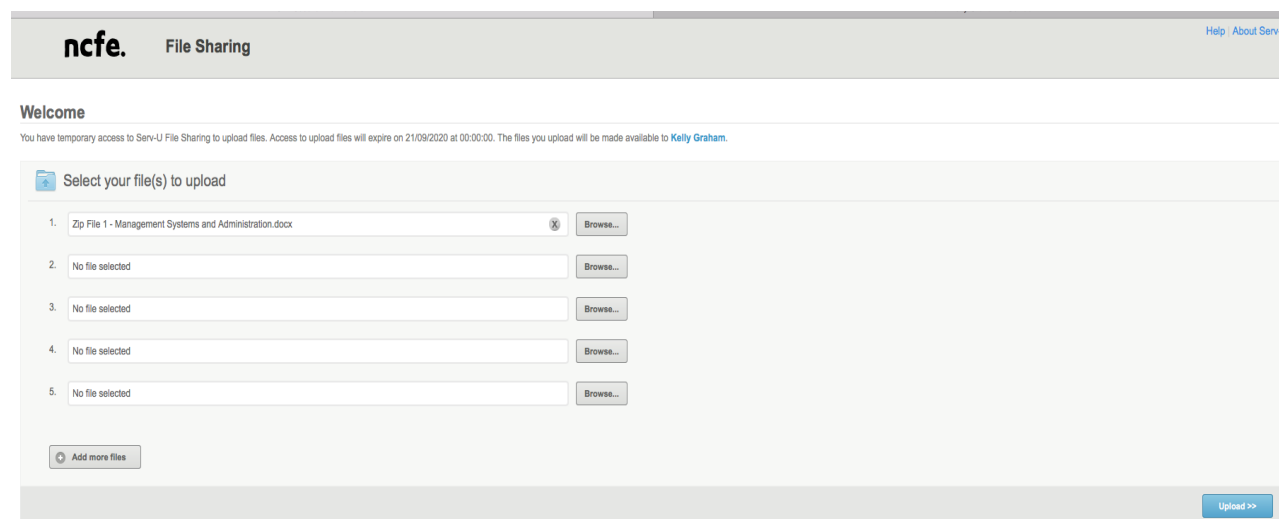
- Management Systems and Administration Arrangements
- Resources
- Delivery and Assessment (for EQA reviews, there must be subfolders within this folder for each learner to include all their evidence)
- Internal Quality Assurance
- Learner and Centre feedback (EQA & AMR only)

Moderation folders

- Management Systems and Administration Arrangements
- Moderation (there must be subfolders within this folder for each learner to include all their evidence)

Uploading the evidence to Serv-U

1. Locate our confirmation of review email with the Serv-U link
2. Copy and paste the link to your browser
3. Click **browse** to upload your first Zip Folder – Management Systems and Administration Arrangements
4. Continue to upload the remaining Zip Folders



The screenshot shows the 'ncfe. File Sharing' interface. At the top, there's a header with the ncfe. logo and 'File Sharing' text, and a 'Help About Serv-U' link. Below the header, a 'Welcome' message states: 'You have temporary access to Serv-U File Sharing to upload files. Access to upload files will expire on 21/09/2020 at 00:00:00. The files you upload will be made available to Kelly Graham.' The main area is titled 'Select your file(s) to upload'. It contains a list of five items, each with a text input field and a 'Browse...' button. The first item is 'Zip File 1 - Management Systems and Administration.docx'. The other four items are 'No file selected'. At the bottom left, there is an 'Add more files' button. At the bottom right, there is an 'Upload >>' button.


5. The confirmation screen below shows that the files have been successfully uploaded.

ncfe.

File Sharing

File Upload Confirmation

The following file was successfully uploaded and sent to [Kelly Graham](#) on 14/09/2020 at 14:26:11

1  Zip File 1 - Management Systems and Administration.docx

Need to send more files to Kelly Graham?
 [Send More Files >>](#)


6. If you need to send more files. Select 'Select more files' and follow the steps above.

ncfe.

File Sharing

File Upload Confirmation

The following file was successfully uploaded and sent to [Kelly Graham](#) on 14/09/2020 at 14:26:11

1  Zip File 1 - Management Systems and Administration.docx

Need to send more files to Kelly Graham?
 [Send More Files >>](#)

If you're finished, please close this window.

OneDrive

If using OneDrive, we will grant you access to the folder you require. You will receive an email notification when a folder has been shared with you. Within this folder there will be subfolders, as labelled above.

Before you start to upload your files, you must ensure you have all the evidence required, as per the above Centre Guidance document and any additional evidence requested from your EQA/QR. Once you have the information you can start to upload your files to the relevant folders.

Files and folders must be:

- clearly labelled, making it clear what the document is, which learner/unit/submission it relates to, where applicable
- uploaded in full, rather than separate pages. Where documents are scanned, the pages must be uploaded the correct way up and must be of good quality



Version control:

Date approved	
Approved by	
Review date	

Only approved versions of this document should be documented in the below table:

Version	Date	Revision author(s)	Summary of changes
V2	29.7.21	Kelly Graham	<ul style="list-style-type: none"> • Heading amended from Preparing for a Remote EQA Review to Preparing for a Remote Review • Information added around approval, AMR and Moderation reviews • Infographic added to show file structure • Information added around OneDrive

