

Portal User Guide

September 2022

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The Portal - Introduction

The Portal is a secure website which allows you to:

- register your learners
- book learners for paper based external assessment and controlled assessment
- view learner results for external assessment
- submit internal units for graded qualifications
- claim learner certificates
- view learners eCertificates
- view learner details using the search area and edit learner details.

Please be aware that if there's 30 minutes or more of inactivity, then the Portal will time out and you'll be prompted to log back in.

The Portal can be found at the following address <https://portal.ncfe.org.uk> .

The link can also be found under the login area of our website (www.ncfe.org.uk).

How do I get a Username and Password?

To request a Portal account:

- Go to the '**Log in**' tab from top menu bar on our NCFE (www.ncfe.org.uk)
- Select '**Portal**' from the list of options available
- Click '**Register here**' from the Portal log in page
- Complete the requested fields and click send.

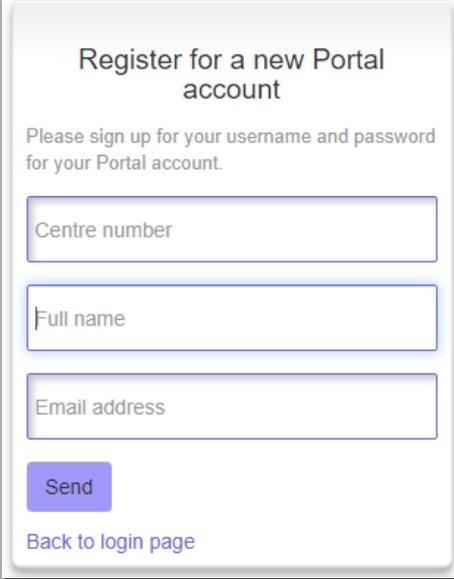
If you're the first person to request login details at your centre, you'll be set up as the Portal Admin user by our Customer Support team.

If your centre already uses the Portal, this request will go to your Portal Admin who will be able to create your account.

Once you have requested a Portal account and your account has been created, you will receive an email containing a reset password link.

- Access the link in the email and enter your username. Click '**Send**' to trigger another email including a verification code.
- Activate your account using the verification code provided and create a password. Click '**OK**'
- You will see a message confirming your account is now active. Click '**Finish**' to complete the process.

If you have forgotten your username and/or password, please follow the links on the Portal login screen to reset your log in credentials.

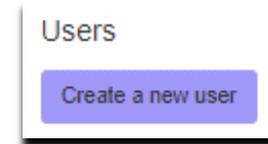


The screenshot shows a registration form titled "Register for a new Portal account". Below the title is a sub-header "Please sign up for your username and password for your Portal account." The form contains three input fields: "Centre number", "Full name", and "Email address". Below these fields is a blue "Send" button and a blue link "Back to login page".

How do I Create a New User?

The Portal Admin User within a centre is the person responsible for creating new user accounts and assigning the appropriate permissions.

To set up a new user in the Portal go to the '**My Account**' tab, select '**Manage Users**' and click to '**Create a new user**'.



To create a new user, you will need the following information:

- Full name
- Email address
- Username – Please use the user's email address
- Permissions – you can confirm by selection which permissions each user will have.

Once all the fields have been completed and permissions have been selected, select '**Save**'.

The user will receive an email to the registered address with a link to follow. This link will activate the new account with the new username.

Once activated, another email will be received asking the user to change their password.

You can edit users in this screen by selecting '**Edit**' alongside the appropriate user account. This will allow you to change the full name, email address and permissions of the user.

You will also be able to remove user accounts from the Portal using the '**Delete**' button. It is the Portal Admin User's responsibility to make sure your users are accurate and kept up to date.

If you need to set up a user to only access information on QualHub (www.qualhub.co.uk), please set them up as a user with no permissions.

Search

Products

You can search for products by selecting '**Search**' from the Portal menu and clicking the '**Products**' tab.

You can view all of the products your centre is approved to deliver by searching '**All Products**'. Alternatively, you can refine your search by selecting a sector from the list available or by entering a specific product code or product name.

You can search for products by entering either the product code or title. The list will show all the products your centre's approved for, unless you select **Show All**. Once you've found the right product you can view product details or register learners by clicking on the appropriate icon.

Sector: All Products | Product code: | Product name: | QA group: | Show: Approved

Search | Clear

[Download in CSV format](#)

Product Code	Product Title	QA Group	EQA	DCS	DCS Lapse date	Display on QualHub
500/5959/2/ART	NCFE Level 1 Award in Creative Craft Using Art and Design	Arts and Media	Mr Qman Mod1	None		<input type="checkbox"/>

Visit Reports

You can search for a Visit Report, by selecting '**Search**', then '**Visit Reports**'.

You can view all your centre's visit reports by selecting '**All**' in the '**Visit Type**'. Alternatively, you can refine your search by selecting a visit type from the list available or by entering a specific product code, product name, session and/or visit date.

You can also find your EQA contact details by clicking on the EQA name, and you can view your Visit Report by selecting the PDF.

Visit Type	Product Code	Product or Group name	EQA	Visit Number	Visit Date	Next Visit Date	Report
EQA	GROUP	Health, Childcare and Education	Mr Qman Mod1	2	31 Jul 2021		
EQA	GROUP	Health, Childcare and Education	Mr Qman Mod1	1	01 Jul 2021		
EQA	GROUP	Arts and Media	Mr Qman Mod1	1	01 Jul 2021		
EQA	GROUP	Functional Skills	Mr Qman Mod1	1	29 Jun 2021		
EQA	GROUP	Engineering and Manufacturing Operations	Mr Qman Mod1	1	28 Jun 2021	31 Aug 2021	
EQA	GROUP	Sport, Exercise and Fitness	Mr Qman Mod1	1	28 Jun 2021		
EQA	GROUP	Customised Qualifications	Mr Qman Mod1	1	27 Jun 2021		
EQA	GROUP	Travel and Tourism	Mr Qman Mod1	1	22 Jun 2021		
EQA	GROUP	Business, IT and Sales	Mr Qman Mod1	1	22 Jun 2021		

This screen will provide the details of any planned visits within the '**Next Visit Date**' column.

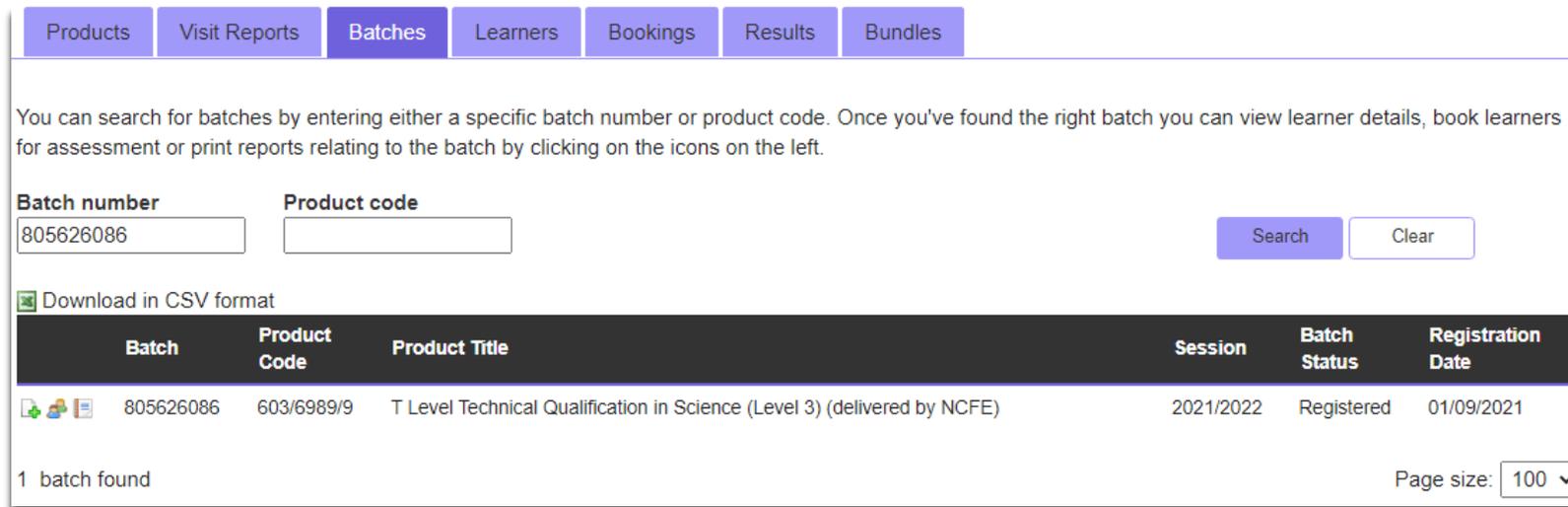
You can also view and access copies of completed visit reports as a pdf document by clicking the report icon in the '**Report**' column.

Batches

You can search for a batch by selecting '**Search**' from the Portal menu and clicking the '**Batches**' tab.

You can search by a specific batch number or product code.

Three icons will appear next to your search results. These icons allow you to book learners for external assessment, show learners on that batch number and view all the associated reports.



The screenshot shows a web interface with a navigation bar containing tabs: Products, Visit Reports, Batches, Learners, Bookings, Results, and Bundles. The 'Batches' tab is selected. Below the navigation bar, there is a search form with two input fields: 'Batch number' (containing '805626086') and 'Product code' (empty). To the right of these fields are 'Search' and 'Clear' buttons. Below the search form, there is a link 'Download in CSV format'. A table displays the search results with the following columns: Batch, Product Code, Product Title, Session, Batch Status, and Registration Date. The table contains one row of data. At the bottom left, it says '1 batch found' and at the bottom right, there is a 'Page size' dropdown menu set to '100'.

Batch	Product Code	Product Title	Session	Batch Status	Registration Date
805626086	603/6989/9	T Level Technical Qualification in Science (Level 3) (delivered by NCFE)	2021/2022	Registered	01/09/2021

Learners

You can search for your learners by selecting '**Search**' from the Portal menu and clicking the '**Learners**' tab.

You can search for learners by product code, centre learner number, ULN, learner number, forename and/or surname. You can then order your search results by selecting the column headers.

You can also export the search results to a CSV file by using the '**Download in CSV format**' option.

Portal search

Products Visit Reports Batches **Learners** Bookings Results Bundles

You can search for learners by entering either the product code, centre learner no, ULN, forename or surname.

Product code Centre Learner No. ULN Learner No. Forename Surname

601/3998/5

 Download in CSV format

Name	ULN	Learner Number	Batch	Centre Learner No.	DOB	Language	Product Code	Session	Learner Status	Overall Grade
Portal User-Guide	1234567899	106101339	805637885		10/08/1920	Not provided	601/3998/5	2021/2022	Full Certificate	A*

Bookings

You can search for your assessment bookings by selecting '**Search**' from the Portal menu and clicking the '**Bookings**' tab.

You can search for assessment bookings by batch number, Product Code or ULN. You can then order your search results by selecting the column headers.

You can also export the search results to a CSV file by using the '**Download in CSV format**' option.

Clicking on the icons to the right of each row show the Entry learner list and the reports for the batch respectively.

Products Visit Reports Batches Learners **Bookings** Results Bundles

You can search for learner bookings by entering a batch number, product code or ULN.

Batch number Product code ULN

 Download in CSV format

Batch	Product Code	Session	Assessment Code	Assessment Name	Booking Date / Assessment Window	ULN
  805630763	603/7066/X	2021/2022	000218	Core 1B (Paper Based)	22/06/2023 09:00	1234567899
  805637398	603/7066/X	2021/2022	000218	Core 1B (Paper Based)	22/06/2023 09:00	1234567899

Bundles (including Apprenticeship Registration)

You can search for your Apprenticeship registrations by selecting '**Search**', then '**Bundles**'. You can search by bundle batch number, product code, product name, learner number, forename, surname and/or date of birth.

If you click on the returned results for each learner, it will confirm which qualifications they are registered against as part of the bundle batch.

Products Visit Reports Batches Learners Bookings Results **Bundles**

You can search for learners on an apprenticeship by using the search fields below. You can click on a learner to see more information.

Batch number	Product code	Product name	Learner No.	Forename	Surname	D.O.B (DD/MM/YYYY)
<input type="text" value="100005120"/>	<input type="text"/>					

Batch Number	Product Code	Product Name	Name	DOB	ULN
100005120	APP5311	Children, Young People and Families Manager within the Community (with Children and Young People's Management)	PORTAL GUIDE	25/05/1977	1234567899

Page size: ▾

Registrations

Background

There are currently three main methods of registering learners:

- **Key In:** allows you to manually enter learners' details on to a batch.
- **Upload via CSV file:** allows you to upload your learners using a CSV file.
- **Tribal/Bulk CSV:** allows you to create multiple lists of learners for different qualifications/batches to upload in one CSV file. (Note: This cannot be use for products which require an assessment booking on registration)

Tribal Upload: if you use Tribal EBS MIS you can upload learners directly from their system to ours.

As of 21/01/2022 registration onto products that are not approved for your centre (banking learners) is no longer possible. Please ensure your centre has the required approval prior to registration. Approval can be gained through the '**Our website**' tab.

Withdrawal of lapsed learner registrations

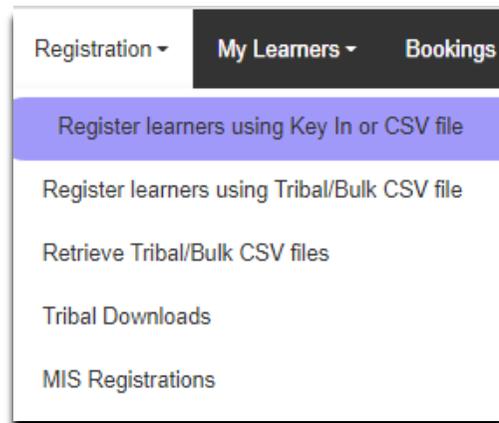
We will start to actively withdraw learners once their lapsed date has past which is normally 36 months (this may vary depending on the qualification).

1. If you realise a learner is about to be withdrawn and you want this to be stopped, you can request with Customer Support to increase the lapsed date
2. If a learner is withdrawn and you want to continue, you can un-withdraw the learner in the '**My Learners**' screen.

Please Note: when un-withdrawing a learner and their lapse date is in the past, the lapse date is extended by 6 months from the current date.

Register Learners Using Key In Method

To register learners using the 'Key in' method, select '**Registrations**' from the Portal menu and click '**Register learners using Key in or CSV file**'.



You can search for the product or batch number (if you would like to add your learners to an existing batch) which you'd like to register your learners on.

Register your learners

To register your learners, please select your product or batch in the search box below.

Search

A product is a regulated or unregulated qualification, apprenticeship or bundle.

A batch number is a reference number we assign to a group of learners that have been registered.

You can search for a product by entering the product name, product code, apprenticeship title, batch number and apprenticeship batch numbers.

Please Note: The Portal will always default and register your learners on the current session which runs from 01 August to 31 July each calendar year.

To register a learner, first select the product and session (if available) you'd like to register your learner on. Additionally, you can choose to add learners to an existing batch.

Register your learners

To register your learners, please select your product or batch in the search box below:

Search

Available Sessions

Add to existing batch

Add your learners

Forename*	Middle names	Surname*	DOB* (dd/mm/yyyy)	Ethnicity	Gender*	Centre Learner Ref.	Unique Learner No.	Postcode	
<input type="text" value="Portal"/>	<input type="text" value="User"/>	<input type="text" value="Guide"/>	<input type="text" value="15/02/2022"/>	<input type="text" value="-"/>	<input type="text" value="Male"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="NE1"/>	<input type="button" value="Add"/>

Upload learners by CSV

No file chosen

You can now add you learner information by keying in this data.

The fields which are marked with an asterisk (*) are mandatory fields that must be completed. All other fields are optional however, we strongly advise to register learners with a valid Unique Learner Number (ULN) so achievement can be uploaded to the Personal Learner Record (PLR).

Type your learner's details into the fields and click the **'add'** button. Another row of blank fields will now be available for you to complete for any additional learners. If you enter learner details without selecting add, their details will not be saved when you complete the process.

The **'Ethnicity'** field should be provided for each learner registered. If this is not known or has not been provided, please select 'Not Provided' from this list of available options. Where an ethnicity is not selected during the registration process 'Not Provided' will be selected by default.

The **'Centre Learner Ref'** can be used if you've assigned a unique reference number to identify your learners by within centre. Alternatively, you can leave this field blank if you don't have one.

Please Note: The maximum number of learners that should be entered onto a batch is **2000**. If a learner is cancelled, or withdrawn from a batch, this will still count towards the 2000 limit.

Adding Access Arrangements and Paper Modifications at Registration

You can add any Access Arrangements and Paper Modifications your learners may require at the point of registration. Once you've added the learner's details two icons will appear to the right of their record as shown below:

Select this icon  to '**Add and amend learner details**' which includes declaring Access Arrangements or Paper Modification requirements.

To add a Paper Modification for a learner, select the appropriate option(s) from the list of available options, including the specific details of any enlarged, coloured or braille papers as required.

To add Access Arrangements for a learner, select the appropriate option(s) from the list available.

Paper Modifications:

- Enlarged Paper
- Coloured Paper
- Non-interactive (PDF) question paper
- Braille Paper and Tactile Diagrams
- Modified Language Paper

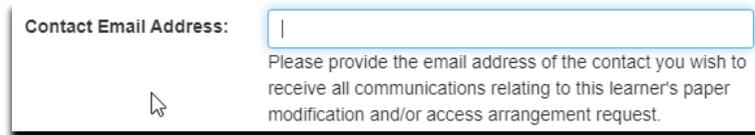
[Deselect All Paper Modifications](#)

Access Arrangements:

- Extra Time: up to 25%
- Extra Time: up to 50%
- Extra Time: over 50%
- Reader
- Computer Reader
- Scribe
- Speech Recognition Technology
- Practical Assistant
- Language Modifier

[Deselect All Access Arrangements](#)

When declaring Access Arrangements and/or Paper Modifications for a learner, the user is required to provide an email address for the contact they want to receive all communications relating to the request. This is so we can complete ad-hoc sampling inspections of supporting evidence of need and so that we can keep you updated with regards to the processing and dispatch of any modified papers.



Contact Email Address:

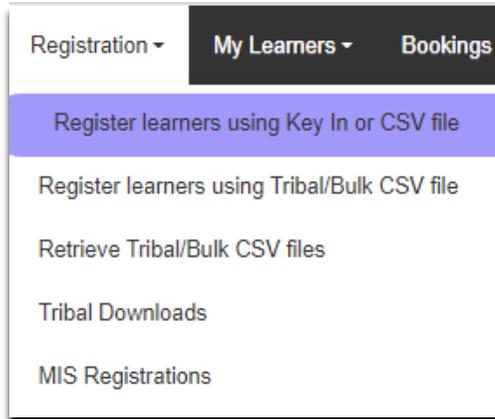
Please provide the email address of the contact you wish to receive all communications relating to this learner's paper modification and/or access arrangement request.

Please Note: Any Access Arrangements or Paper Modification requests declared at the point of registration will be recorded against your learner. This enables us to send you modified papers for any upcoming paper-based assessments without you needing to notify us each time an external assessment booking is made. It also means that any Access Arrangements and Paper Modifications will appear on your external assessment paperwork for paper-based assessments.

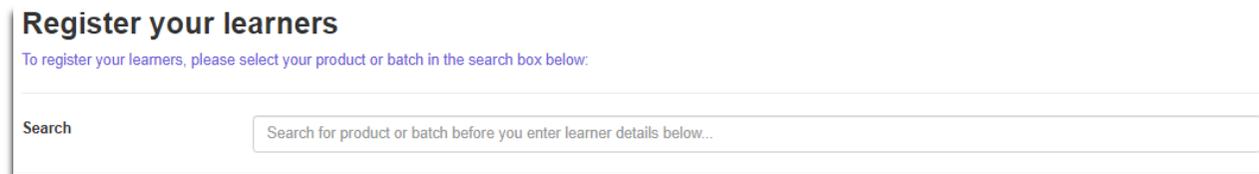
For more information please visit: <https://www.qualhub.co.uk/delivery-and-learner-support/forms/access-arrangements-reasonable-adjustments/>

Registering Learners Using CSV File Method

To register learners using the 'CSV File' method, select '**Registrations**' from the Portal menu and click '**Register learners using Key In or CSV file**'.



You can search for the product or batch number (if you would like to add your learners to an existing batch) which you'd like to register your learners on.

A screenshot of a web form titled 'Register your learners'. Below the title, there is a blue link that says 'To register your learners, please select your product or batch in the search box below:'. Below this is a search box with the placeholder text 'Search for product or batch before you enter learner details below...'. The search box is preceded by the word 'Search'.

Below is the format that you will need to use when creating your learner file when making registrations via the CSV upload method. This example can be downloaded via our support section. You can leave the header row in

the document when you import the CSV file.

The mandatory fields are forename, surname, date of birth and gender. The file must be saved as a '.csv' file. When adding learner's '**Ethnicity**' to a CSV file these should be entered using the following codes:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Forename	Middle Name	Surname	DOB	Ethnicity	Gender	Centre Candidate ID.	ULN	Language	Paper Modification 1	PM 1 Sub	Paper Modification 2	PM 2 Sub	Paper Modification 3	PM 3 Sub	AA 1	AA 2

- 31** - English / Welsh / Scottish / Northern Irish / British
- 32** - Irish
- 33** - Gypsy or Irish Traveller
- 34** - Any other White background
- 35** - White and Black Caribbean
- 36** - White and Black African
- 37** - White and Asian
- 38** - Any other mixed / multiple ethnic background
- 39** - Indian

- 40** - Pakistani
- 41** - Bangladeshi
- 42** - Chinese
- 43** - Any other Asian background
- 44** - African
- 45** - Caribbean
- 46** - Any other Black / African / Caribbean background
- 47** - Arab
- 98** - Any other ethnic group
- 99** - Not provided

When adding a learner's '**Gender**' to a CSV file these should be confirmed using the following abbreviations:

- M** - Male
- F** - Female
- U** - Prefer not to say

Paper Modifications (where required) should be added within columns '**J**' to '**O**'. When adding enlarged, coloured and braille paper modifications you must also provide the specific size, shade and grade respectively, in the

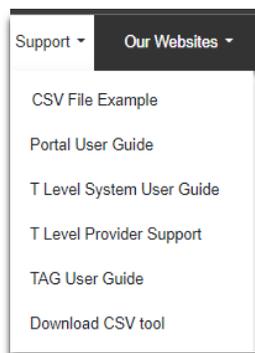
adjacent column to the paper modification.

Access Arrangements (where required) should be added within columns 'P' to 'X'.

J	K	L	M	N	O	P	Q
Paper Modification 1	PM 1 Sub	Paper Modification 2	PM 2 Sub	Paper Modification 3	PM 3 Sub	AA 1	AA 2
Enlarged Paper	A4 18pt bold					Reader	Scribe

Using the CSV Tool

The CSV tool is available to help you create your CSV file. It will also help you make sure all the learner details are in the correct format before you import the file. To use the CSV tool, go to the **Support** section and then **Download CSV tool**. An example of what this looks like is located in **Support** under '**CSV File Example**'.



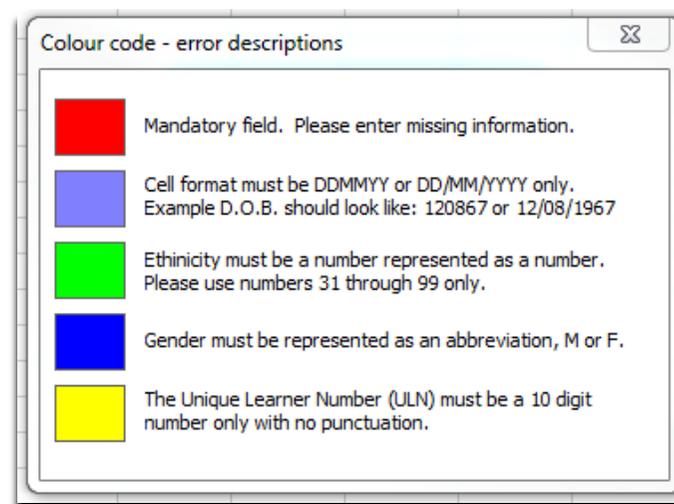
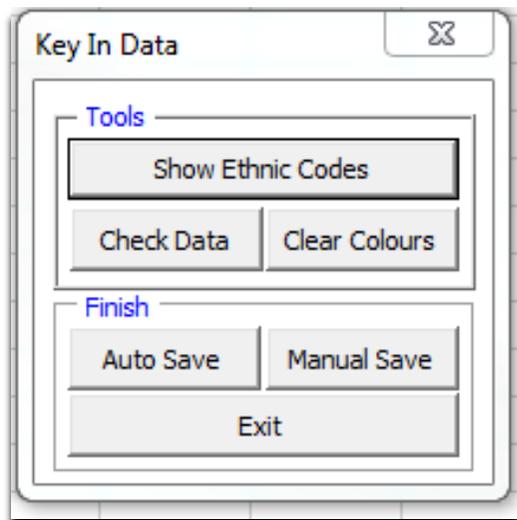
You will then be presented with a Microsoft Excel Security Notice, and you must select the option to '**Enable Macros**' to continue.

A Microsoft Excel sheet will then open. Select '**Add-ins**' from the menu options across the top of the sheet. This

will open the NCFE CSV Tool. From the dropdown select the relevant field. The tool will then open, and the header rows will now show.

Complete the fields and when you're finished, select the tool again.

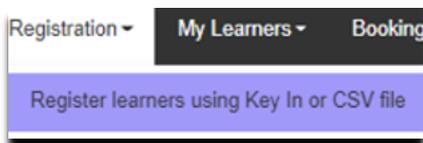
Select '**Check Data**' and this will show you if your file is ready to import. Any fields that haven't been input correctly will be coloured red to indicate where amendments to data is required. Once you have made the required amendments your file will be ready to upload.



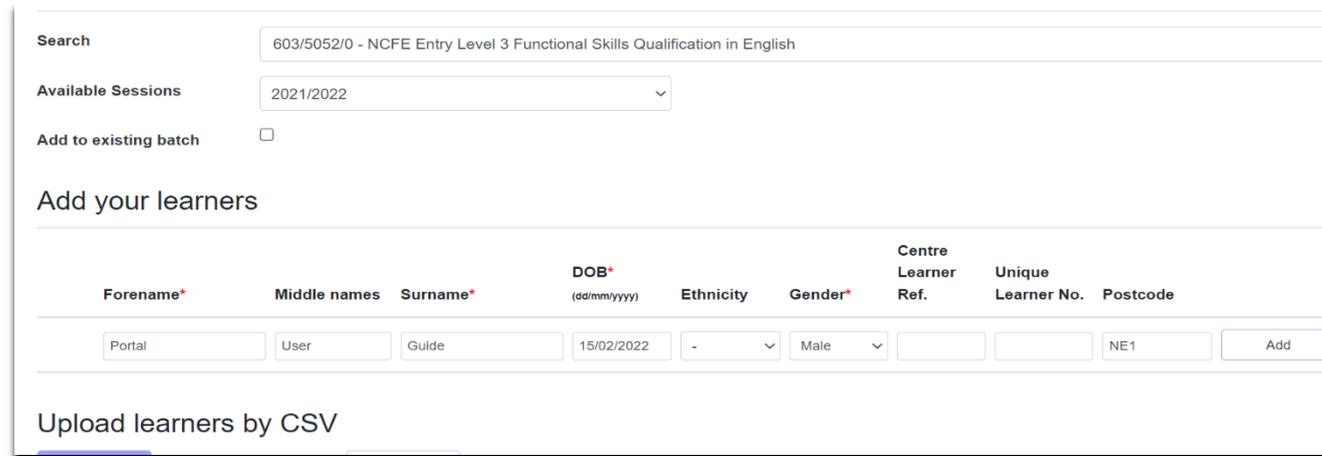
Uploading a CSV file

On the portal navigate to '**Register learners using Key In or CSV file**'. On the page that appears enter the qualification using either the product code or name and select it from the drop-down list that appears ensure that the correct session is chosen from '**Available Sessions**' is selected.

If needed, you can also add the learners onto another batch by ticking the box for '**add to existing batch**' and choosing the relevant batch.



Certain qualifications display additional sections such as enabling a booking on registration which can be completed by choosing the desired booking date from the drop-down box.



Search: 603/5052/0 - NCFE Entry Level 3 Functional Skills Qualification in English

Available Sessions: 2021/2022

Add to existing batch:

Add your learners

Forename*	Middle names	Surname*	DOB* (dd/mm/yyyy)	Ethnicity	Gender*	Centre Learner Ref.	Unique Learner No.	Postcode	
Portal	User	Guide	15/02/2022	-	Male			NE1	Add

Upload learners by CSV

Selecting '**Choose File**' located in the bottom left of the screen opens file explorer and allows you to select the previously saved CSV file with your learner's information in. Select your file, then click '**Upload**' and when you are happy with the entered data, click '**Next**'.

You'll then see the below '**Centre Information**' screen.

The address drop down will show all addresses for your centre that we have on our system. Select the address where the learners are based.

If the address that you need is not showing, contact the Customer Support team to arrange for this to be added.

The '**Contact name**' and '**Email address**' fields will auto populate according to your Portal login details. You can also input your own reference number or purchase order information in the available fields (if required). Assessment Materials Contact can also be added for details on who we should contact for electronically based materials

The screenshot shows a web form titled "Centre information". At the top, there is a dropdown menu labeled "Select the address you want to use against the batch *" with "Main Address" selected. Below this are several input fields: "Contact name *" with "Portal User Guide" entered; "Your email address *" with "Portal@useguide.com" entered; "Telephone STD/Number" with two empty boxes; "Fax STD/Number" with two empty boxes; "Your reference number" with one empty box; and "Purchase order number" with one empty box. At the bottom right, there are two buttons: "Back" and "Finish".

Once all details are completed on this screen, click '**Finish**' to complete the registration.

Upon completing the registration process, you will see a confirmation message as shown below. This confirmation message will display the batch number the learners have been registered to. The batch number is unique to this group of learners and can be used when booking learners for external assessments, viewing results, submitting graded internal units and claiming certificates.

This page will also display any paperwork associated with this batch of learners. You can print or download these for your records, or you can access them by using the Search function later. If applicable, you can book your learners straight onto an external assessment.

Learner registration complete

Thank you, we've received your learner registrations your status is: **Registered**

Your learners are registered on batch number: **805627187**

Please download the paperwork you need, these can be accessed when ever you need them via the search screens.

Invoices will be sent to your Finance team for payment.

- [Order ORD001436403](#)
- [Learner Status Report FS English Entry Level](#)
- [Certificate Claim Form FS](#)
- [Order Summary](#)

Registering Learners for V Certs

When you register learners for a V Cert qualification, you will be required to confirm the '**Expected Completion Year**' and '**Assessment Window**' you want your learners booked onto. This booking will be the learners first attempt and any subsequent resits will need to be booked via the '**Bookings**' screen.

Once these have been selected, you can follow the Key In/CSV upload process as above.

Register your learners

To register your learners, please select your product or batch in the search box below:

Search	<input type="text" value="601/6774/9 - NCFE Level 2 Technical Award in Music Technology"/>
Expected Completion Year	<input type="text" value="Please select..."/>
Available Sessions	<input type="text" value="2021/2022"/>
Add to existing batch	<input type="checkbox"/>
Assessment Window	<input type="text" value="Please select..."/>

Registering Learners on an Apprenticeship

To register learners on an apprenticeship, search for the apprenticeship by title. A dropdown list will appear for you to select the appropriate apprenticeship from your search results.

Register your learners

To register your learners, please select your product or batch in the search box below:

Search

APP6628 - Adult Care Worker with Level 2 Functional Skills

Available Sessions

Not Applicable

Add to existing batch

The confirmation page will show you the batch number for the apprenticeship as a whole

Apprenticeship registration complete!

Thank you, your learners have been registered. Your batch number is: 100005119.

You can now add Paper Modifications and Access Arrangements for your learner(s) via the links below.

Please download the paperwork and order confirmation below. An invoice will be sent to your Finance team for payment.

- [Order ORD001445427](#)

See below for registration details of each component on your chosen apprenticeship.

NCFE CACHE Level 3 Diploma for the Early Years Workforce (Early Years Educator)

Status: Registered

Batch Number: 805627947

- [Certificate Claim Form QCF Credit Tx](#)
- [Learner Status Report](#)

NCFE Level 2 Functional Skills Qualification in English
Status: Registered
Batch Number: 805627949

Book External Assessment ➔

Submit PM/AA ➔

- [Certificate Claim Form FS](#)
- [Learner Status Report FS English](#)
- [External Assessment Entry Form FS](#)

This page will also display any paperwork associated with this batch of learners. You can print or download these for your records, or you can access them by using the Search function later.

The batch number is unique to this group of learners and can be used when entering learners for external assessments, viewing results, submitting graded internal units and claiming certificates.

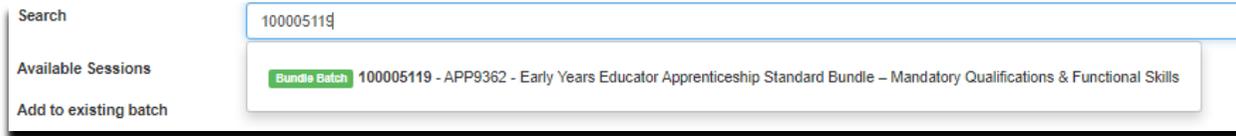
If there are External Assessments for parts of the apprenticeship, then options to book will also appear.

Adding learners to an Existing Apprenticeship Batch

There are 2 ways to add additional learners to an existing Apprenticeship batch.

If you enter the apprenticeship batch number (1) in the search field and select the batch in the drop down, it will add any learners you register directly to that batch as shown below.

1



Search: 100005119

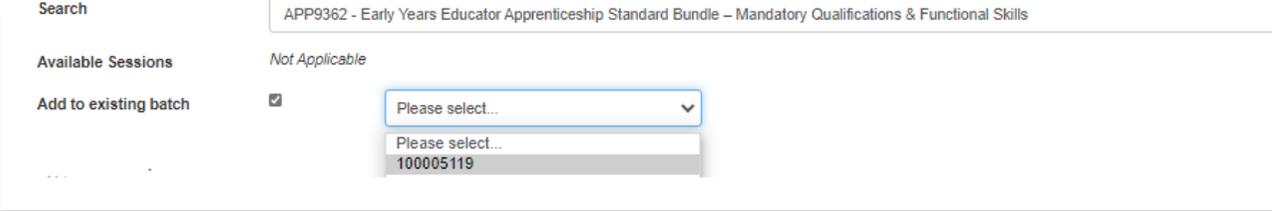
Available Sessions: Bundle Batch 100005119 - APP9362 - Early Years Educator Apprenticeship Standard Bundle – Mandatory Qualifications & Functional Skills

Add to existing batch:

Alternatively, if you enter the apprenticeship name (2), you will be able to put a tick in the 'Add to existing batch' box.

You will then be given a drop down that shows all the batches that have been registered previously on this product by your centre as shown below.

2



Search: APP9362 - Early Years Educator Apprenticeship Standard Bundle – Mandatory Qualifications & Functional Skills

Available Sessions: Not Applicable

Add to existing batch:

Dropdown menu options: Please select..., 100005119

Register Learners Using a Tribal/Bulk CSV File

A Bulk CSV file allows you to register learners on multiple qualifications from a single CSV file.

Bulk CSV registration currently does not allow for registration for T-level programs or Entry on Registration. Please follow the process for Key In or CSV (non-bulk) registration.

The header row to the batch must be set out using the following format:

Record type (NCFE1), centre number, centre reference, blank field, product code, blank field, blank field – Only Record Type (NCFE1), Centre Number and Product Code are mandatory.

The learner information rows must be set out using the following format:

Record type (NCFE2), first name, middle name, surname, date of birth, centre learner ref, ethnicity code (see page 19), gender, unique learner number (ULN). Only Record Type (NCFE2), Forename, Surname and Date of Birth are mandatory fields

- You can register as many batches on as many products as you like using a bulk CSV file.
- Continue to insert new header rows for each batch of learners you want to create.
- Save the file as a **.csv** file and upload the information.

	A	B	C	D	E	F	G	H	I	J	K
	Document was last saved: 5m ago					603/291					
1	NCFE1	3092 Cohort 1			3/0						
2	NCFE2	Mr		A11	27121977		99	M	1234567899		NE1 1UP
3	NCFE2	Mr		B22	27121977		99	M	1234567899		NE1 1UP
					603/291						
4	NCFE1	3092 Cohort 2			3/0						
5	NCFE2	Test_1		Surname_	26051913		99	M	1234567899		NE1 1UP
6	NCFE2	Test_2		Surname_	26051913		99	M	1234567899		NE1 1UP
7	NCFE2	Test_3		Surname_	26051913		99	M	1234567899		NE1 1UP
8	NCFE2	Test_4		Surname_	26051913		99	F	1234567899		NE1 1UP

To register your learners using a bulk CSV file, select '**Registration**', then '**Register learners using Tribal/Bulk CSV file**'. Then select '**Next**'.

Select '**Browse**', locate your file, then select '**Upload**' when the field is populated. Your files will show as below:

Tribal/Bulk CSV Learner Registration: Step 1/3

Upload and Register Batches

To upload your learner details, please press the browse button, select the CSV file you want and then press the Upload button.

The maximum number of learners you can upload in one CSV file is 250. If you've more learners than this, then please split them into multiple files.

If you want to delete any batches, please tick the box next to the batches you'd like to delete and then click the Delete link at the top of the final column.

Select Tribal/Bulk CSV file:

[Choose File](#) No file chosen

[Upload](#)

Uploaded Batches:

	Product Code	Centre ref	Date Uploaded	Uploaded By	Delete
Select	603/7066/X		10/08/2021	Ryan Turner	<input type="checkbox"/>
Select	603/7066/X		10/08/2021	Ryan Turner	<input type="checkbox"/>

A line will be produced for each group of learners on your Bulk CSV file. If the line is greyed out, this indicates an error on the product code that was entered. You'll need to review the submission for this product and resubmit. If you make an upload by mistake, then that line can be deleted by ticking the right box and selecting the delete button.

Select the first batch you'd like to register by clicking '**Select**' and then click '**Next**'.

If you've a specific reference that you need to attach to this batch, you can add it in the **'Your reference number'** field.

Tribal/Bulk CSV Learner Registration: Step 2/3

The maximum number of learners you can upload in one CSV file is 250. If you've more learners than this, then please split them into multiple files.

Batch Information

Product code:	603/0634/8
Product name:	NCFE Level 2 Certificate in the Principles of Warehousing and Storage
Reference:	<input type="text"/>
Purchase Order Number:	<input type="text"/>
Session:	2021/2022 ▼
Email*:	customersupport@ncfe.or
Contact:	Portal User Guide
Address:	(Main Address) Test Q6, Quorum Business Park, Benton Lane ▼
Tel STD/No:	<input type="text"/> <input type="text"/>
Fax STD/No:	<input type="text"/> <input type="text"/>

Note: Field with an * is mandatory

Previous Next Cancel

Add a Purchase order number if you need it on the registration order. Select the product and session (if available).

The **'Contact'** and **'Email'** fields will auto populate according to your Portal login details.

Select the address where the learners are based. If the address that you need is not showing, contact our Customer Support

team to arrange for this to be added.

Once you have checked that all of the information is accurate, click to **'Next'**.

Your learner details will now show. Any information that is incorrect will be highlighted, and you can amend this here. Once you're happy with the information, select **'Next'**.

- Data is missing or in the wrong format
- Your current submission contains duplicate learners
- This learner has already been submitted on this batch
- This learner has already been submitted on this programme

No.	Forename	Middle names	Surname	Centre Learner Ref.	Unique Learner No.	DOB (dd/mm/yyyy)	Ethnicity	Gender	Delete
1.	Mr		A		111111111	01/01/0884	Not provided	Male	<input type="checkbox"/>
2.	Mr		B			27/12/1977	Not provided	Male	<input checked="" type="checkbox"/>
3.	Mr		B			27/12/1977	Not provided	Male	<input checked="" type="checkbox"/>
4.	Mr		D			27/12/1977	Not provided	Female	<input type="checkbox"/>

The next screen allows you to confirm your learners' details before completing the registrations of your learners. If you need to make any further amendments, select '**Previous**'.

Select '**Finish**' once you've checked all the information entered is accurate.

603/0634/8, NCFE Level 2 Certificate in the Principles of Warehousing and Storage
for NCFE Test Centre (003092)

Name	ULN	DoB	Ethnicity	Gender
Mr A		27/12/1977	Not provided	M
Mr B		27/12/1977	Not provided	M
Mr c		27/12/1977	Not provided	M

Please note:

Once you've pressed the **Finish** button, these learners will be registered and you'll be able to download your order confirmation for the registration fee.

The confirmation page will show you the batch number the learners have been registered on to. The batch number is unique to this group of learners and can be used when entering learners for external assessments, viewing results, submitting graded internal units and claiming certificates.

This page will also display any paperwork associated with this batch of learners. You can print or download these for your records, or you can access them by using the '**Search**' function at later date.

Learner registration complete!

Thank you, we've received your learner registrations your status is: **Registered**

Your learners are registered on batch number: **805627188**

Please download the paperwork you need, these can be accessed when ever you need them via the search screens.

Invoices will be sent to your Finance team for payment.

Here are some reports which you can download:

[Order ORD001436404](#)

[Order Summary](#)

[Learner Status Report](#)

[Certificate Claim Form](#)

[Leave your feedback here](#)

NCFE and Tribal Group plc

NCFE and Tribal have linked the Portal and Tribal's Management Information System, ebs™ to reduce the duplication of work normally needed when registering learners.

The first phase of the link described in the following pages show the simple steps involved in linking data exported from Tribal's Management Information System, ebs™ to the Portal. They also show how to download base data which is specially formatted to be imported directly into Tribal's Management Information System, ebs™.

Who are Tribal Group plc?

Tribal is part of Tribal Group plc www.tribalgroup.com and has been involved in the UK FE sector for almost 25 years building up a considerable understanding of the changing needs of the sector. They have close involvement with LSC developments and a growing presence in the Adult Education sector.

Tribal Group is one of the UK's largest quoted providers of software and services to the UK learning and skills sector.

ebs™ Management Information System

There are currently more than 140 institutions using the ebs™ system.

Tribal advertise their Management Information System, ebs™ as a fully modularised system, which will suit the varied needs of colleges of all sizes, offering a number of unique benefits in each module but with particular strengths in timetables, registers and examinations.

Tribal Contact Information

<p>Michael Fisher Product Manager, Management Systems & Solutions Tribal</p> <p>Tribal Citylab 4-6 Dalton Square Lancaster LA1 1PP</p> <p>T +44 (0)1524 384085 M +44 (0)7775 550336</p> <p>michael.fisher@tribalgroup.com www.tribalgroup.com</p>	<p>Kevin Atkins UK Core Product Owner</p> <p>Tribal St Mary's Court 55 St Mary's Road Sheffield S2 4AN</p> <p>T +44 (0) 844 8115070 M +44 (0) 778 6661043 F +44 (0) 14 2816021</p> <p>kevin.atkins@tribalgroup.com www.tribalgroup.com</p>
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My Learners

Manage Learners

You can manage your learner registrations by selecting **'My Learners'** from the Portal menu and clicking the **'Manage Learners'** option.

This screen allows you to search for your learners, before being able to cancel, withdraw and un-withdraw, transfer and top up/down learner's registrations.

My learners

Welcome to the My learners screen, you'll be able to edit learner details here as well as completing cancellations, transfers, top ups and withdrawing your learners. Information on Fees and Pricing can be found on the website.

<input type="checkbox"/> Batch	Forename	Surname	DOB	NCFE Learner Number	Centre Learner Number	ULN	Product Code	Product Name	Current Learner Status	Registration Date	Edit
<input type="checkbox"/> 805627957	portal	guide		Learner No.		ULN	Product code				<input type="button" value="Search"/>
<input type="checkbox"/> 805627957	PORTAL	GUIDE	06/06/1995	106037596			603/2963/4	NCFE Level 1/2 Technical Award in Engineering	Registered	23 Sep 2021	<input type="button" value="Edit"/>
<input type="checkbox"/> 805627957	PORTAL	GUIDE2	07/07/1996	106037597			603/2963/4	NCFE Level 1/2 Technical Award in Engineering	Registered	23 Sep 2021	<input type="button" value="Edit"/>

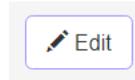
First < Previous 1 ▾ Next > Last

Your search returned 2 learner(s). Displaying page 1 of 1

Edit Learners

You can edit a learner registration by selecting **'My Learners'** from the Portal menu and clicking the **'Manage Learners'** option.

After searching for the learner(s) you wish to edit, tick the box to the left of the learner(s) name and click the button to **'Edit'** to amend learner details.

A screenshot of a web form titled "Edit learner" with a close button (X) in the top right corner. The form is organized into several sections: "Forename" (text input with "Portal"), "Middle names" (text input with "User"), and "Surname" (text input with "Guide"). Below these is a "Rename reason" dropdown menu set to "Preferred name". The "Gender" section has a dropdown menu set to "Male". The "DOB (dd/mm/yyyy)" field contains "27/12/1977" and the "Centre Learner Number" field is empty. There are two dropdown menus for "Certificate language" and "Exam Paper language", both currently set to "-". The "Access Arrangements" section includes checkboxes for "Extra Time: up to 25%", "Extra Time: up to 50%", "Extra Time: over 50%", "Reader", "Computer Reader", "Scribe", "Speech Recognition Technology", "Practical Assistant", and "Language Modifier", with a "Deselect All Access Arrangements" button below. The "Paper Modifications" section includes checkboxes for "Enlarged Paper", "Coloured Paper", "Non-interactive (PDF) question paper", "Braille Paper and Tactile Diagrams", and "Modified Language Paper", with a "Deselect All Paper Modifications" button below. At the bottom, there is a checkbox for a confirmation statement: "By changing a learner's name you are confirming that you have seen the relevant learner ID and have a robust name change policy in place at your centre." Below this are "Save Changes" and "Cancel Changes" buttons.

Within this screen you can amend a learner's forename, middle names, surname, gender, date of birth and centre learner number. You can also add, edit or remove Access Arrangements and Paper Modifications for a learner.

You can also amend a learner name for 90 days after the certification date. We will reissue the certificate in the new name, and you will automatically be charged a replacement certificate fee of £35 per learner. You will need to provide a reason for the name change when requesting a replacement certificate.

Withdraw Learners

You can withdraw a learner registration by selecting '**My Learners**' from the Portal menu and clicking the '**Manage Learners**' option.

To withdraw learners, select your learner(s) and click the '**Withdraw learners**' button.

<input type="checkbox"/> Batch	Forename	Surname	DOB	Learner Number	Learner Number	ULN	Product Code	Product Name	Learner Status	Registration Date	Edit
<input type="checkbox"/> 805627188	Forename	Surname		Learner No.		ULN	Product code				<input type="button" value="Search"/>
<input type="checkbox"/> 805627188	PORTAL	GUIDE	27/12/1977	106018281			603/0634/8	NCFE Level 2 Certificate in the Principles of Warehousing and Storage	Withdrawn	21 Sep 2021	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/> 805627188	PORTAL	GUIDE2	27/12/1977	106018282			603/0634/8	NCFE Level 2 Certificate in the Principles of Warehousing and Storage	Registered	21 Sep 2021	<input type="button" value="Edit"/>
<input type="checkbox"/> 805627188	PORTAL	GUIDE3	27/12/1977	106018283			603/0634/8	NCFE Level 2 Certificate in the Principles of Warehousing and Storage	Registered	21 Sep 2021	<input type="button" value="Edit"/>

First < Previous 1 ▾ Next > Last

Your search returned 3 learner(s). Displaying page 1 of 1

To un-withdraw learners, select your learner(s) and click the '**Un-withdraw learners**' button.

Cancel Learners

You can cancel a learner registration by selecting '**My Learners**' from the Portal menu and clicking the '**Manage Learners**' option.

After searching for the learner(s) you wish to cancel, tick the box to the left of the learner(s) name and click the button to '**Cancel learners**'.

Once a learner's registration has been cancelled, this can't be changed. The learner's registration fee will be credited, if the cancellation is done within 5 working days of the initial registration date. Please refer to the Fees and Pricing Guide for further information.

One learner has been cancelled successfully

- 805627188
 - Here is your credit note [CRD000061793](#)
 - Here is your order information [ORD001436405](#)

<input type="checkbox"/>	Batch	Forename	Surname	DOB	NCFE Learner Number	Centre Learner Number	ULN	Product Code	Product Name	Current Learner Status	Registration Date	Edit
	<input type="text" value="805627188"/>	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text" value="Learner No."/>	<input type="text"/>	<input type="text" value="ULN"/>	<input type="text" value="Product code"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>
<input type="checkbox"/>	805627188	PORTAL	GUIDE	27/12/1977	106018281			603/0634/8	NCFE Level 2 Certificate in the Principles of Warehousing and Storage	Withdrawn	21 Sep 2021	<input type="button" value="Edit"/>
<input type="checkbox"/>	805627188	PORTAL	GUIDE2	27/12/1977	106018282			603/0634/8	NCFE Level 2 Certificate in the Principles of Warehousing and Storage	Registered	21 Sep 2021	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	805627188	PORTAL	GUIDE3	27/12/1977	106018283			603/0634/8	NCFE Level 2 Certificate in the Principles of Warehousing and Storage	Cancelled	21 Sep 2021	<input type="button" value="Edit"/>

Transfer Learners

You can transfer a learner registration by selecting **'My Learners'** from the Portal menu and clicking the **'Manage Learners'** option.

After searching for the learner(s) you wish to transfer, tick the box to the left of the learner(s) name and click the button to **'Transfer learners'**.

The learner's registration fee will be credited, provided this learner hasn't been sampled as part of an External Quality Assurance visit. Please refer to the Fees and Pricing Guide for further information.

You will need to provide the product code, and batch number (if transferring to an existing batch). You can also add a Purchase Order Number.

Reports for the original and new batch will be available to print or download.

Transfer your learners

To transfer your learners, please choose your product and batch below.

Product	<input type="text" value="600/0030/2 - NCFE Functional Skills Qualification in Information and Communication Technology (ICT) at Level 1"/>
Batch	<input type="text"/>
Purchase Order Number	<input type="text"/>

Top up/down Learners

You can top up learners by selecting '**My Learners**' from the Portal menu and clicking the '**Manage Learners**' option.

After searching for the learner(s) you wish to top up, tick the box to the left of the learner(s) name and click the button to '**Top up learners**'.

The learner's registration fee will be credited, and you will be charged the new registration fee. The highest fee will always apply. Please refer to the Fees and Pricing Guide for further information.

You will need to provide the product code, batch number (if transferring to an existing batch). You can also add a Purchase Order Number.

You will only be able to top up, or down, if the learner has an internal or external result, otherwise follow the transfer instructions. You will only be able to top up/down to a product that is part of the same nested suite.

Reports for the original and new batch will be available to print or download.

Top up your learners

To top up your learners, please choose your product and batch below.

Product	<input type="text" value="601/3999/7 - NCFE CACHE Level 3 Certificate in Childcare and Education"/>
Batch	<input type="text"/>
Purchase Order Number	<input type="text"/>

Manage ULNs

You can manage your learner ULNs by selecting 'My Learners' from the Portal menu and clicking the 'Manage ULN' option.

You can search for your learners on this screen using product code, batch number, forename, surname and/or date range.

Please Note: Only the Portal LRS admin user at your centre can access the Learner Records Service (LRS) screen to update a learner's ULN.

Learner Records Service (LRS)

You can update your learners with a Unique Learner Number (ULN) here, please do this as soon as possible.

Here's an explanation of why the following colours may appear:

❌ ULN format is incorrect

⚠️ Record has not been saved

✅ Record has been saved

Product Code: Batch No: Forename: Surname: Date range: to

SearchClear

Save All	Cancel A	Forename	Surname	ULN	Product	Session	Batch No.	Gender	DOB
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER ONE	<input type="text"/>	601/4000/8	2018/2019	805346262	Male	10/10/1990
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER ONE	<input type="text"/>	501/2324/5	2018/2019	805346260	Male	10/10/1990
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER THREE	<input type="text"/>	501/1660/5	2018/2019	805346258	Male	10/10/1990

You can add a learner's ULN by typing into the empty box and then either select '**Save**' on each line individually or select '**Save All**'.

You can also amend a learner's ULN by overwriting the existing ULN then either select '**Save**' on each line individually or select '**Save All**'.

If you try and save a ULN in an incorrect format (less than 10 digits or starting with a 0) the ULN field will turn red.

Save All	Cancel A	Forename	Surname	ULN	Product	Session	Batch No.	Gender	DOB
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER ONE	<input type="text" value="8787"/>	601/4000/8	2018/2019	805346262	Male	10/10/1990
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER ONE	<input type="text"/>	501/2324/5	2018/2019	805346260	Male	10/10/1990
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER THREE	<input type="text"/>	501/1660/5	2018/2019	805346258	Male	10/10/1990

When a ULN is input in the correct format, the row will turn green when saved. We will then send the ULN to LRS to be validated.

Save All	Cancel A	Forename	Surname	ULN	Product	Session	Batch No.	Gender	DOB
Saved		TEST	LEARNER ONE	1234567899	601/4000/8	2018/2019	805346262	Male	10/10/1990
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER ONE	<input type="text"/>	501/2324/5	2018/2019	805346260	Male	10/10/1990
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	TEST	LEARNER THREE	<input type="text"/>	501/1660/5	2018/2019	805346258	Male	10/10/1990

The following error codes will show how your NCFE registration differs from what LRS have for your learner.

Flag	Condition
VRF001	The supplied "Given Name" does not match the "Given Name" held by LRS.
VRF002	The supplied "Given Name" does not match the "Family Name" held by LRS.
VRF003	The supplied "Given Name" does not match the "Previous Family Name" held by LRS.
VRF004	The supplied "Family Name" does not match the "Given Name" held by LRS.
VRF005	The supplied "Family Name" does not match the "Family Name" held by LRS.
VRF006	The supplied "Family Name" does not match the "Previous Family Name" held by LRS.
VRF007	The supplied "Date of Birth" does not match the "Date of Birth" held by LRS.
VRF008	The supplied "Gender" does not match the "Gender" held by LRS.

Bookings

Book Learners for Paper Based External Assessments

You can create new learner bookings by selecting '**Bookings**' from the Portal menu and clicking the '**Book External Assessment**' option.

You can search for your learners to create new bookings using batch, forename, surname, product code and product name. Only learners that are registered on a product with external assessment components will be displayed.

External Assessment Bookings

You can search, create and view bookings for external assessments. Information on fees and pricing can be found on our website.

External Assessments | Controlled Assessments

	Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Session	
<input type="button" value="Deselect all"/>	<input type="text" value="805627191"/>	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Product code"/>	<input type="text" value="Product name"/>	<input type="text"/>	<input type="button" value="Search"/>
<input checked="" type="checkbox"/>	805627191	PORTAL	GUIDE	01/01/2000	106018286	603/3294/3	NCFE CACHE Level 2 Technical Award in Health and Social Care	2021/2022	

Your search returned 1 learner. Displaying page 1 of 1
You've selected 1 learner

After searching for your learner(s) you can then click to select the learners you wish to create new or view existing bookings for. When searching for a batch of learners, you have the option to select all learners on the page, or all on the batch.

You can also make bookings for learners that are on different batches, providing they are registered on the same product and session.

To make a booking after selecting your learners, click '**Make bookings**' and you will see the '**Booking details**' screen.

External Assessments
Controlled Assessments

	Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Session
<input type="button" value="Deselect all"/>	<input type="text" value="805627191"/>	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Product code"/>	<input type="text" value="Product name"/>	<input type="button" value="Search"/>
<input checked="" type="checkbox"/>	805627191	PORTAL	GUIDE	01/01/2000	106018286	603/3294/3	NCFE CACHE Level 2 Technical Award in Health and Social Care	2021/2022
<input checked="" type="checkbox"/>	805627191	PORTAL	GUIDE2	21/09/1994	106018287	603/3294/3	NCFE CACHE Level 2 Technical Award in Health and Social Care	2021/2022
<input checked="" type="checkbox"/>	805627191	PORTAL	GUIDE3	06/08/1980	106018288	603/3294/3	NCFE CACHE Level 2 Technical Award in Health and Social Care	2021/2022
<input checked="" type="checkbox"/>	805627191	PORTAL	GUIDE4	08/09/1991	106018289	603/3294/3	NCFE CACHE Level 2 Technical Award in Health and Social Care	2021/2022

Your search returned 4 learners. Displaying page 1 of 1

You've selected 4 learners

New booking: NCFE Level 2 Functional Skills Qualification in English

Product code	Product name	Centre contact
603/5054/4	NCFE Level 2 Functional Skills Qualification in English	

[Add additional contact](#)

Batch	Forename	Surname	NCFE Learner Number	ULN	Assessments	TAG	Exam paper language
805627192	PORTAL	GUIDE	106018290		<input type="checkbox"/> 603/5054/4 Level 2 English - Reading <input type="checkbox"/> 603/5054/4 Level 2 English - Writing	<input type="checkbox"/> <input type="checkbox"/>	English ▾

[First](#)
[< Previous](#)
[1 ▾](#)
[Next >](#)
[Last](#)

[< Back](#)
[Book entries](#)
[Cancel](#)

For Functional Skills English, you can book learners for the Reading and Writing assessment components at the same time. First, select the assessments you would like to make a booking for. If you have selected both assessments, you will see two tabs appear under the **Enter assessment details** heading.

Enter assessment details

603/5054/4 Level 2 English - Reading

Assessment window

Level 2 Functional Skills in English - Reading - July 2021 (A1) ▼

Select delivery address

(Main Address) Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT ▼

Select assessment location (if different to delivery address)

Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT

Same as delivery address

Select assessment date and time



You must complete both tabs with the delivery address, the assessment location and the date and time that you would like the assessment to take place.

You will need to type in the assessment location, if different to the delivery address. Once you have typed in the assessment location, the system will remember it, so you won't need to type it in again the next time you make a booking.

Please Note: we require a minimum of 10 working days' notice for paper-based assessment bookings.

Please Note: It is possible to book with less than 10 working days' notice, but this will incur a fast-track fee. It is not possible to book a paper-based assessment on the Portal within 5 working days of the assessment date.

Select '**Book entries**' when you've checked all information is accurate and are ready to proceed.

After clicking to '**Book entries**' you will see the '**Confirm entry details**' screen appear. If you need to change anything, you can click to '**Edit entries**' and you will return to the previous '**Bookings details**' screen.

Otherwise, once all learner details are correct click '**Book entries**' to complete the booking.

Confirm entry details

You are about to book the following assessments. Please check the assessment details before confirming.

Assessments information:

Product Code	Product Name	Assessment Component	Assessment Window	Location	Delivery Address
603/5054/4	NCFE Level 2 Functional Skills Qualification in English	603/5054/4 Level 2 English - Reading	07/12/2020 - 11/12/2020	Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT	Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT

Batch	Forename	Surname	NCFE Learner Number	ULN	Exam paper language	Centre contact
805550755	LEARNER	ONE_01	105644651		English	Glyn Walker glynwalker@ncfe.org.uk

Product Code	Product Name	Assessment Component	Assessment Window	Location	Delivery Address
603/5054/4	NCFE Level 2 Functional Skills Qualification in English	603/5054/4 Level 2 English - Writing	07/12/2020 - 11/12/2020	Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT	Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT

Batch	Forename	Surname	NCFE Learner Number	ULN	Exam paper language	Centre contact
805550755	LEARNER	ONE_01	105644651		English	Glyn Walker glynwalker@ncfe.org.uk

Upon completing the booking, you will see a confirmation message as shown below. All assessment paperwork such as the Booking Confirmation Report and Invigilator Registers (paper-based assessments only) will be available from this screen.

Entries for Assessment Complete

Thank you, your learner(s) have been entered for the assessment.

Please note: where the booking relates to a cancelled assessment in the 2020/21 session, and made on a representative Summer 2021 awarding window, no papers will be dispatched, and no assessment paperwork is required

External assessment papers will be dispatched at least **3 working days** before the assessment date/start of assessment window.

Please download the report(s) below including your order confirmation. An invoice will be sent to your Finance team for payment (if applicable).

- 805627194
 - [Order Summary](#)
 - 603/5054/4 Level 2 English - Reading**
 - [External Assessment Bookings Confirmation Report Multiple Assessment - 603/5054/4 Level 2 English - Reading](#)
 - [Invigilators Register of Learners \(FS Reform\) - 603/5054/4 Level 2 English - Reading](#)

If you need to request a reasonable adjustment for any of the learners you have booked for an assessment, please use the form available on the NCFE website [here](#).

[Leave your feedback here](#)

[Enter more learners](#)

View Existing Bookings for Paper Based External Assessments

You can view existing learner bookings by selecting '**Bookings**' from the Portal menu and clicking the '**View External Assessment**' option.

You can search for your learners to view existing bookings using batch, forename, surname, product code and product name. Only learners that are registered on a product with external assessment components will be displayed.

After searching for your learner(s) you can then click to select the learners you wish to create new or view existing bookings for. When searching for a batch of learners, you have the option to select all learners on the page, or all on the batch.

Once you've selected your learners, you will have the option to '**View bookings**'.

View existing bookings

You can see which learners have been booked for an external assessment below. If you need any help, please contact Customer Support.

NCFE Level 2 Functional Skills Qualification in English - 603/5054/4 Level 2 English - Reading - 31/07/2022

Select the assessment you would like to view, and the booking information will be displayed.

This screen displays information relating to the booking including the current '**Booking status**', e.g. Active, Cancelled, Transferred, Pending Result or Result Issued. You can also access and download copies of the assessment paperwork such as the Booking Confirmation Reports and Invigilator Register (paper-based assessments only).

NCFE Level 2 Functional Skills Qualification in English - 603/5054/4 Level 2 English - Reading - 31/07/2022

Product code	Product name	Centre contact	
603/5054/4	NCFE Level 2 Functional Skills Qualification in English	Ryan Turner	ryanturner@ncfe.org.uk

Batch	Forename	Surname	NCFE Learner Number	ULN	TAG	Exam paper language	Booking status
805627194	PORTAL	GUIDE	106018292		<input type="checkbox"/>	English	Active

First < Previous 1 ▾ Next > Last

You can change the delivery address for your assessment papers by using the drop down below. You can do this up to the cut-off date for the assessment window. Only addresses that are registered with NCFE, will show. If you need further addresses to be added to your account, please contact the Customer Support team. You may only change the delivery address for products with assessment windows.

The screenshot shows a form titled "Assessment details" with a tab labeled "TAAD". Below the tab, there are two main sections: "Assessment window" and "Delivery address". The "Assessment window" section has a dropdown menu currently displaying "07 March 2022 - 9.00am - TAAD". The "Delivery address" section has a dropdown menu that is currently empty, indicating a list of registered addresses.

On this screen you can also transfer your assessment window booking to another assessment window for the qualification as well as if needed cancel the assessment (note that cancelling the assessment does not cancel the learner's registration). To do so, with your booking visible scroll to the bottom of the page and click the corresponding buttons and follow the on-screen prompts.

Transfer Booking

Cancel booking

Downloading Pre-release and Assessment Materials

Background

Some of our NCFE qualifications require pre-release materials for the learners prior to the external assessment starting, as well as some which have electronically shared assessment materials.

Details of all of these affected qualifications can be found in the Qualification Specific Instructions for Delivery (QSID) [here](#) but also highlighted in Appendix 1 and 2 in this document.

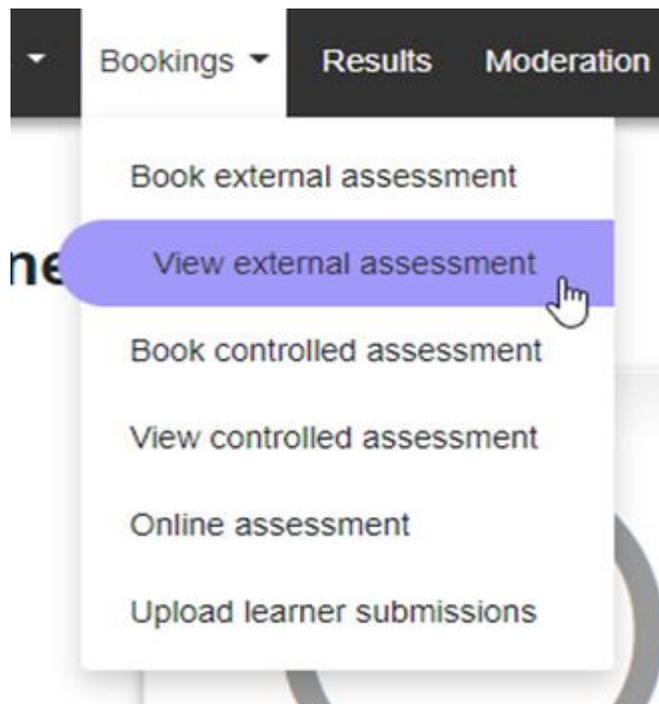
Centres will be required to download and store all pre-release and electronic assessment materials in line with the Regulations for the Conduct of External Assessment which can be found [here](#).

It is the Centre's responsibility to ensure all files are downloaded and made available to learners in line with the Regulations for the Conduct of External Assessments.

Centres will need to ensure that any learners due to sit an external assessment have been registered and booked onto the correct assessment through the NCFE Portal.

Further information and guidance on making bookings is available in the Portal handbook available [here](#).

Using the navigation ribbon at the top of the NCFE Portal select **Bookings > view external bookings**



Search for the appropriate booking(s) for the pre-release/assessment materials being accessed – select the booking and click **view bookings** at the bottom of the page

View external assessment bookings

On this screen you can search for your bookings made for external assessments.

External assessments Controlled assessments

	Batch	Forename	Surname	DOB	NCFE learner number	Product code	Product name	Session	
Deselect all	805718458	Download	Surname			Product code	Product name		Search
<input checked="" type="checkbox"/>	805718458	DOWNLOAD	TESTEK	01/01/1990	106559241	601/8908/3	NCFE Level 3 Applied General Certificate in Business and Enterprise	2022/2023	

First < Previous 1 Next > Last

Your search returned 1 learner. Displaying page 1 of 1.
You've selected 1 learner.

[Return to book external assessments](#) [View bookings](#)

Select the appropriate booking again

View existing bookings

You can see which learners have been booked for an external assessment below. If you need any help, please contact Customer Support.

[NCFE Level 3 Applied General Certificate in Business and Enterprise - Level 3 Applied General - Business & Enterprise - 22 March 2023 9.00am - BE3](#)

Once the booking has opened, scroll to the bottom of the page to access and download any associated pre-release and/or assessment materials

Assessment details

Level 3 Applied General - Business & Enterprise

Assessment window

22 March 2023 9.00am - BE3

Delivery address

(Main Address) Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT

Assessment location

Main

Reports

- [Order Summary](#)
- [External Assessment Bookings Confirmation Report Assessment Window - Level 3 Applied General - Business & Enterprise](#)
- [Invigilator's Register of Learners Assessment Window - Level 3 Applied General - Business & Enterprise](#)

Assessment Materials

- [Test Download Document - Digital Assessment Materials.docx](#)
- [Test Download Document - Pre-Release Materials.docx](#)

[Transfer booking](#)

[Cancel booking](#)

Important Information

Pre-release materials will be made available within the Portal either in line with the published dates within the Key Date Schedule (T Levels) or 10 working days (all other qualifications) before the external assessment is due to start.

Where qualifications require electronic assessment materials, these will be made available within the Portal no more than 3 working days before the external assessment is due to start.

The pre-release and/or electronic assessment materials will only be available to be accessed until the end of the assessment time.

Where centre staff are unable to access the Bookings section of the Portal we would recommend contacting the centre's Portal Administrator in the first instance.

Late/Very Late Bookings

For some qualifications we will accept assessment bookings after the advertised bookings cut-off date for your chosen assessment window has passed. Bookings made after the bookings cut-off date has passed, but before the assessment begins are known as late/very late bookings.

During the late booking period you can book as many learners as required (within 5 working days of bookings cut-off date having passed).

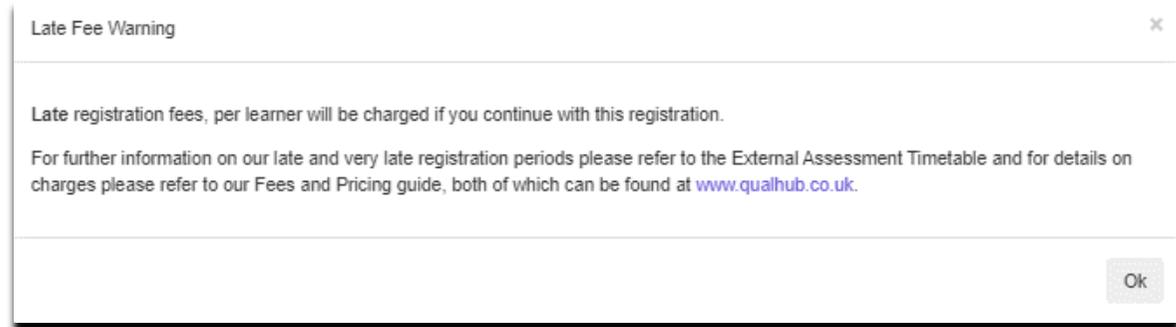
We will also accept up to a maximum of 50 learner bookings during our very late bookings period (within 6-10 working days of the bookings cut-off date having passed).

Once 10 working days or more have passed since the bookings cut-off date, we're unable to accept any further bookings to the chosen assessment/assessment window.

Please refer to our fees and pricing guide on our website for details on our late and very late booking fees.

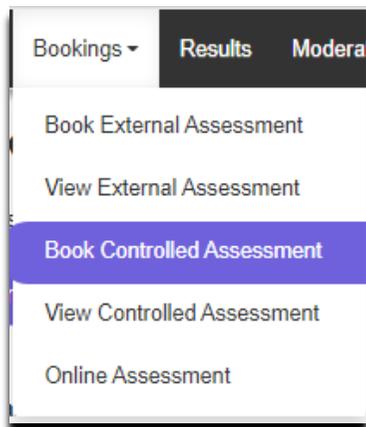
To process a late or very late booking, follow the normal bookings process. When you select an assessment/assessment window which is within the 10 working days bookings cut-off period, the following message will be displayed:

To do this, follow the normal bookings process. When you select an assessment window, you will be presented with the following message.



Booking Learners for Controlled Assessment

For some products, you will need to book your learners for a Controlled Assessment. To book your learners onto a Controlled Assessment, select '**Book Controlled Assessment**' from the Bookings dropdown.



You will then need to find your learners, you can do this by searching on Batch Number, Forename, Surname, Date of birth, Product Code or Product Name.

Select the learners that you wish to book onto a Controlled Assessment. The Book Controlled Assessment button will now be available for selection.

After searching for your learner(s) you can then click to select the learners you wish to create new or view existing bookings for. When searching for a batch of learners, you have the option to select all learners on the page, or all on the batch.

You can also make bookings for learners that are on different batches, providing they are registered on the same product and session.

To make a booking after selecting your learners, click '**Book Controlled Assessments**'.

Level1/2 Technical Awards – Synoptic Assessment

The Assessment Topic Selection screen will appear after selecting '**Book Controlled Assessment**' allowing for you to confirm details and the learners selected are correct.

For Technical Awards you may only book your learners onto the Controlled Assessment once.

Assessments are only available for Technical Awards, during certain windows, therefore the Assessment Topic will automatically during the available period.

Assessment Topic Selection

Welcome to the Assessment Topic Selection screen. On this screen you should set a topic for the all selected learners and set Expected Completion Year for learners that are registered for Synoptic Programmes.

An assessment topic will be automatically selected for learners on the Essential Digital Skills Qualifications. Please make a record of the topics allocated to each learner or save a screenshot of this page. This is important to ensure assessment preparation is carried out accurately for each learner.

Expected Completion Year:

Batch	Full Name	DOB	NCFE Learner Number	Product Code	Product Name	Session	
805627957	PORTAL GUIDE	06/06/1995	106037596	603/2963/4	NCFE Level 1/2 Technical Award in Engineering	2021/2022	<input type="text" value="L12 TA Engineering Synoptic Project 20-21 Final V2"/>
805627957	PORTAL GUIDE2	07/07/1996	106037597	603/2963/4	NCFE Level 1/2 Technical Award in Engineering	2021/2022	<input type="text" value="L12 TA Engineering Synoptic Project 20-21 Final V2"/>

Choose the Expected Completion Year and select Confirmation to progress to the next screen.

Please read the declaration and click the '**Confirm**' tick box and a green box will appear with the assessment materials associated with your booking.

Confirm controlled assessment declaration

Thanks for your booking.

In line with the regulations for the conduct of this assessment, you are required to complete the following actions:

- for **Functional Skills** - complete the mandatory Assessment Tracking Document
- for **Technical Awards** - refer to the published timescales on our website to know when your Controlled Assessment needs to be submitted and complete the Learner Log for each learner
- refer to published timescales on the relevant qualification page to know when your Controlled Assessment needs to be completed

The above documents can be found on the relevant qualification page here: <https://www.qualhub.co.uk/>. Please ensure you're using the most recent version from our website.

Declaration:

As the designated person, I declare I have learners ready to complete the Controlled Assessment and will adhere to the relevant regulations around Controlled Assessments. Upon submission of this declaration, a notification will be sent to your External Quality Assurer for the purposes of quality assurance and/or monitoring.

Confirm

The following assessment materials are available for download:

- 603/2963/4 - NCFE Level 1/2 Technical Award in Engineering:
 - [L12 TA Engineering Synoptic Project 20-21 Final V2](#)

Assessments are only available for Technical Awards, during certain windows. If you book a learner onto a Controlled Assessment outside of a window, you will see this message:

Controlled Assessment Bookings

You can search, create and view bookings for controlled assessments.

[External Assessments](#) [Controlled Assessments](#)

There are no available assessments to be booked at this time. Please check published times for release of assessment materials.

Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Session
<input type="text" value="Batch"/>	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="603/2963/4"/>	<input type="text" value="Product name"/>	<input type="text"/>

Please refer to the External Assessment Timetable on our website for more information.

Please Note: For Technical Awards, you may only book your learners onto the Controlled Assessment once.

Functional Skills Qualifications

You will then need to find your learners, you can do this by searching on batch number, forename, surname, date of birth, product code or product name.

Select the learners that you wish to book onto a Controlled Assessment. The '**Book Controlled Assessment**' button will now be available for selection. Upon selection, you'll be taken to the '**Assessment Topic Selection**' screen.

Assessment Topic Selection

Welcome to the Assessment Topic Selection screen. On this screen you should set a topic for the all selected learners and set Expected Completion Year for learners that are registered for Synoptic Programmes.

An assessment topic will be automatically selected for learners on the Essential Digital Skills Qualifications. Please make a record of the topics allocated to each learner or save a screenshot of this page. This is important to ensure assessment preparation is carried out accurately for each learner.

Batch	Full Name	DOB	NCFE Learner Number	Product Code	Product Name	Session	
805628268	PORTAL GUIDE	23/04/1978	106038392	603/5056/8	NCFE Entry Level 2 Functional Skills Qualification in English	2021/2022	EL2 English Reading - AP 15 - Party Planning
805628268	PORTAL GUIDE2	30/01/1967	106038393	603/5056/8	NCFE Entry Level 2 Functional Skills Qualification in English	2021/2022	EL2 English Reading - AP 15 - Party Planning

All available topics will be available to select from the drop down. Select the relevant one and you'll then be able to confirm your Controlled Assessment booking. If you are booking for a pre-approved contextualised paper, select the contextualised topic option. Please note, English components for Reading may also appear as 'R' and Writing components may sometimes appear as 'W'. The following screen will appear, read the declaration to ensure you agree with the statement and if you are happy to proceed click the 'Confirm' tick box and the green box will appear with your assessment materials.

Confirm controlled assessment declaration

Thanks for your booking.

In line with the regulations for the conduct of this assessment, you are required to complete the following actions:

- for **Functional Skills** - complete the mandatory Assessment Tracking Document
- for **Technical Awards** - refer to the published timescales on our website to know when your Controlled Assessment needs to be submitted and complete the Learner Log for each learner
- refer to published timescales on the relevant qualification page to know when your Controlled Assessment needs to be completed

The above documents can be found on the relevant qualification page here: <https://www.qualhub.co.uk/>. Please ensure you're using the most recent version from our website.

Declaration:

As the designated person, I declare I have learners ready to complete the Controlled Assessment and will adhere to the relevant regulations around Controlled Assessments. Upon submission of this declaration, a notification will be sent to your External Quality Assurer for the purposes of quality assurance and/or monitoring.

Confirm

Your assessment materials will be available for download here. If you are using a pre-approved contextualised paper, you will already have access to the assessment material.

Your assessment materials will be available for download here

The following assessment materials are available for download:

- 603/5054/4 - NCFE Level 2 Functional Skills Qualification in English:
 - [L2 SLC Activity 11 - Food and Nutrition](#)

Essential Digital Skills Qualifications (EDSQ)

You will then need to find your learners, you can do this by searching on batch number, forename, surname, date of birth, product code or product name.

The Assessment Topic Selection screen will appear after selecting '**Book Controlled Assessment**' allowing you to confirm that the learners selected are correct.

For EDSQ the assessment topic will be randomly selected from the available assessments and cannot be changed.

Assessment Topic Selection

Welcome to the Assessment Topic Selection screen. On this screen you should set a topic for the all selected learners and set Expected Completion Year for learners that are registered for Synoptic Programmes.

An assessment topic will be automatically selected for learners on the Essential Digital Skills Qualifications. Please make a record of the topics allocated to each learner or save a screenshot of this page. This is important to ensure assessment preparation is carried out accurately for each learner.

Batch	Full Name	DOB	NCFE Learner Number	Product Code	Product Name	Session	
805627864	CAB LEARNER	03/12/1975	106037433	603/7118/3	NCFE Level 1 Essential Digital Skills	2021/2022	Mighty Mags ▾

Select the '**Confirmation**' button and the Confirm Controlled Assessment Declaration screen will appear.

Please read the declaration and click the '**Confirm**' tick box and a green box will appear with the assessment materials associated with your booking.

The following assessment materials are available for download:

- 603/7119/5 - NCFE Entry Level 3 Essential Digital Skills:
 - You can go to <https://ncfe.surpass.com/Login> to download your learners' keycode to sit their assessment. Additionally, the following topics were booked against:
 - Topic 1

If you try to book a learner onto a controlled assessment past any published cut off dates, you'll see the following message:

Controlled Assessment Bookings

You can search, create and view bookings for controlled assessments.

External Assessments **Controlled Assessments**

There are no available assessments to be booked at this time. Please check published times for release of assessment materials.

Please refer to the Delivery guidance document on the related Qual page for published cut off dates.

Viewing Booked Learners for Controlled Assessment

To view which learners have been booked onto a Controlled Assessment, select '**View Controlled Assessment**' from the '**Bookings**' menu.

You will then need to find your learners, you can do this by searching on batch, forename, surname, date of birth, product code or product name.

All learners that have been booked onto a Controlled Assessment will show on this page.

If the Controlled Assessment window is open for a Technical Qualification, then the assessment material will be available next to the learner's details.

This page also gives the option to download the Bookings Report, by selecting '**View Bookings Report**' which gives the summary for all learners on the batch booked onto the controlled assessment.

View Controlled Assessment Bookings

Welcome to the View Controlled assessment screen. On this screen you can search for your bookings made for Controlled assessments.

External Assessments **Controlled Assessments**

Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Unit Name	Topic	Declaration Date	Session	
<input type="button" value="Select all"/>	805627957	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text" value="Product co"/>	<input type="text" value="Product name"/>	<input type="text" value="Unit r"/>	<input type="text"/>	<input type="text" value="Declaration"/>	<input type="text"/>	<input type="button" value="Search"/>
<input type="checkbox"/>	805627957	PORTAL	GUIDE	06/06/1995	106037596	603/2963/4	NCFE Level 1/2 Technical Award in Engineering	L12 TA Engineering Synoptic Project 20-21 Final V2	23/09/2021 10:59	2021/2022	<input type="button" value="Assessment Material"/> <input type="button" value="View Bookings Report"/>

Cancelling Booked Learners for Controlled Assessment

You can cancel any learners who have been booked onto a Controlled Assessment. To do this, follow the steps on viewing a Controlled Assessment, and select the learner(s) you would like to cancel. Once learners have been selected, the cancel **'Controlled Assessments button'** will be selectable.

View Controlled Assessment Bookings

Welcome to the View Controlled assessment screen. On this screen you can search for your bookings made for Controlled assessments.

External Assessments **Controlled Assessments**

	Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Unit Name	Topic	Declaration Date	Session	
<input type="button" value="Select all"/>	<input type="text" value="805627957"/>	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Product co"/>	<input type="text" value="Product name"/>	<input type="text" value="Unit r"/>	<input type="text"/>	<input type="text" value="Declaration"/>	<input type="text"/>	<input type="button" value="Search"/>
<input type="checkbox"/>	805627957	PORTAL	GUIDE	06/06/1995	106037596	603/2963/4	NCFE Level 1/2 Technical Award in Engineering	L12 TA Engineering	Synoptic Project 20-21 Final V2	23/09/2021 10:59	2021/2022	<input type="button" value="Assessment Material"/> <input type="button" value="View Bookings Report"/>
<input checked="" type="checkbox"/>	805627957	PORTAL	GUIDE2	07/07/1996	106037597	603/2963/4	NCFE Level 1/2 Technical Award in Engineering	L12 TA Engineering	Synoptic Project 20-21 Final V2	23/09/2021 10:59	2021/2022	<input type="button" value="Assessment Material"/> <input type="button" value="View Bookings Report"/>

Your search returned 2 bookings. Displaying page 1 of 1
You've selected 1 booking

Select '**Cancel Controlled Assessment**', and you will be taken to the '**Cancel Controlled Assessment Booking**' screen. You will be required to provide a reason for the cancellation, and click to '**Confirm**,' to cancel the controlled assessment booking.

Cancel Controlled Assessment Booking

Please note that the cancellation can only be actioned prior to the start date of the assessment.

Declaration:

I hereby confirm I wish to notify NCFE that I have learner(s) booked for Controlled Assessment that I wish to cancel. By completing this declaration, this will trigger a notification to NCFE for the purposes of external quality assurance and/or monitoring.

Please tick this box if you wish to declare that the learner has not seen or sat the assessment. This will allow the assessment to be available for booking in the future.

Learner has not seen or sat the assessment

Cancellation reason

Centre staff unavailable ▼

Controlled assessment bookings have been cancelled.

[< Back](#) [Confirm](#)

Results

Viewing Results

You can view your learner results by selecting '**Results**' from the Portal menu.

You can view all your learner results by selecting the '**Download learner results**' option. Alternatively, you can refine your search by entering a specific batch number, product code, forename, surname, date of birth and/or NCFE learner number.

You can search for results by using the search fields below.

Batch number	Product code	Forename	Surname	DOB (DD/MM/YYYY)	NCFE Learner number	
<input type="text" value="805627198"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
					<input type="button" value="Search"/>	<input type="button" value="Clear"/>

Batch	Product Code	Product Name	Forename	Surname	Date of Birth	NCFE Learner Number	
805627198	603/3293/1	NCFE CACHE Level 2 Technical Award in Child Development and Care	PORTAL	GUIDE	01/12/2000	106018297	<input type="button" value="View"/>

You can then access the Results Confirmation Reports and Student Results Slips by selecting '**View**' against a learner record.

Please Note: For qualifications with fixed assessment dates/windows, results are only available in the Portal on or after the advertised results release date for the assessment.

Please refer to the External Assessment Timetable on our website for more information on assessment and results release dates.

TACDC

Assessment Window/Date	Result	Points/UMS	Batch Reports
27 January 2022 - TACDC - 9.00am - 10.30am	A*	20.00	<ul style="list-style-type: none">External Assessment Learner Results Slip Assessment WindowExternal Assessment Results Confirmation Report Assessment WindowExternal Assessment Learner Results Slip Assessment WindowOrder SummaryExternal Assessment Grade Summary By Window And Batch

Close

Viewing Essential Digital Skills Qualifications Results

For Essential Digital Skills Qualifications the results can display as the following:

- Pass – Learner has passed the qualification and certificate has been issued
- Fail – Learner has failed the assessment and will need to re-sit.
- Pending Awarding - Results are embargoed as the Assessment has not gone through the awarding process
- Pending EQA – Results have been submitted and are pending an EQA review for sign off

[X](#)

603/7119/5 - NCFE Entry Level 3 Essential Digital Skills

Result	Completed Date
Awaiting EQA Review	24 Feb 2022

[Close](#)

Submitting Unit Grades

You can submit unit grades by selecting '**Grading**' then '**Submit Unit Grades**' from the Portal menu.

You can search for your learners to submit unit grades using batch, forename, surname, centre learner reference or NCFE learner number. Click to select the learners that you would like to submit grades for then once all learners needed are selected click next.

Unit grades should only be submitted once the work has been assessed and a sample has been internally quality assured. Once this has been done, please submit the grades for each learner. If you have DCS or following a EQA review (these will now be in a banked state), you can submit a second attempt grade (final grade) to the portal. This grade will then be stored until your EQA reviews this submission.

Your EQA will contact you if an additional review is required, prior to the updated grades being banked.

Please check the information you're about to submit is correct now, as once the grades are submitted, you're unable to make any further amends to this submission.

Batch number	First Name	Surname	Centre Learner Ref	Learner Number		
<input type="text" value="805673581"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Search"/>

<input checked="" type="checkbox"/>	Code	Name	Version	First Name	Surname	D.O.B	Batch	ULN
<input checked="" type="checkbox"/>	603/5937/7	NCFE CACHE Level 2 Certificate in Working with Children in Early Years and Primary Settings	2021/2022	TEST	ANOTHER	01/01/1975	805673581	
<input checked="" type="checkbox"/>	603/5937/7	NCFE CACHE Level 2 Certificate in Working with Children in Early Years and Primary Settings	2021/2022	ANOTHER	TEST	01/01/1980	805673581	

No file chosen

Select the learners that you would like to submit grades for and select '**Next**'. When you select a unit, you get the option to select a grade for each learner. If you wish to come back at a later time and pick up where you left off, please hit the '**Save**' button.

Please Note: grades saved but not yet submitted will not be counted until they are submitted.

When you have finished selecting grades, tick the declaration and complete the full name of your Internal Quality Assurer (IQA) before selecting '**Submit**'.

Submit unit grades

Unit	Learner	DOB	B	P	M	D	NYA
T/507/2655 Customer Service in Travel and...	PORTAL GUIDIE2	01/02/2000	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
A/507/2656 The UK Travel and Tourism Indu...	PORTAL GUIDE	01/01/2000	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
F/507/2657 Travel and Tourism Destination...	PORTAL GUIDE3	03/03/2000	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J/507/2658 Promotion in Travel and Touris...							

I declare that the Internal Quality Assurer (IQA) has confirmed that the learners' grades submitted above are correct:

Internal Quality Assurer (IQA) full name:

Submission successful

Your submission has been successful. Since your centre has Direct Claim Status, all the results have been banked automatically.

Once your grades have been banked please claim your certificates in the certification tab.

Please see a summary of the learners and unit grades that have been submitted. Please print a copy of this screen for your records.

Product: 601/6267/3 - NCFE Level 2 Extended Certificate in Travel and Tourism

Learner	D.O.B	Grade
F/507/2657 - Travel and Tourism Destinations		
PORTAL GUIDIE2	01 Feb 2000	Pass
PORTAL GUIDE	01 Jan 2000	Merit
PORTAL GUIDE3	03 Mar 2000	Merit

[Leave your feedback here](#)

Confirmation of successful unit grade submission will show, please save or print a copy of this screen for your records.

Submitting Unit Grades via a CSV file

You can now submit unit grades through a CSV file, select the learners you'd like to submit unit grades for as normal

<input checked="" type="checkbox"/>	Code	Name	Version	First Name	Surname	D.O.B	Batch	ULN
<input checked="" type="checkbox"/>	603/5937/7	NCFE CACHE Level 2 Certificate in Working with Children in Early Years and Primary Settings	2021/2022	TEST	ANOTHER	01/01/1975	805673581	
<input checked="" type="checkbox"/>	603/5937/7	NCFE CACHE Level 2 Certificate in Working with Children in Early Years and Primary Settings	2021/2022	ANOTHER	TEST	01/01/1980	805673581	

No file chosen

Once selected, select 'Download Submit unit grades', you'll get a blank CSV file.

You do not need to always download the CSV file, if you do not ensure that the file is in the below format and is saved as a 'CSV (comma delimited) file'

	A	B	C	D	E	F	G	H	I	J	K	L
1	LearnerNumber	Forename	Surname	DOB	J/615/7560	M/618/1545	L/615/7558	J/615/7557	J/618/1549	F/618/1551	BatchNumber	ProductNumber
2	106325734	TEST	ANOTHER	01/01/1975							805673581	603/5937/7
3	106325733	ANOTHER	TEST	01/01/1980							805673581	603/5937/7
4												
5												

In the CSV file add the grade for each unit.

	A	B	C	D	E	F	G	H	I	J	K	L
1	LearnerNumber	Forename	Surname	DOB	J/615/7560	M/618/1545	L/615/7558	J/615/7557	J/618/1549	F/618/1551	BatchNumber	ProductNumber
2	106325734	TEST	ANOTHER	01/01/1975	Pass	Merit	Distinction	Pass	Merit	Distinction	805673581	603/5937/7
3	106325733	ANOTHER	TEST	01/01/1980	Pass	Merit	Distinction	Pass	Merit	Distinction	805673581	603/5937/7
4												
5												
6												
7												

Please check the grading model for each qualification, it could be one of the following, but this is not an exhaustive list.

- Pass, Merit, Distinction
- A*, A, B, C, D, E and U
- Level 1 Pass, Level 1 Merit, Level 1 Distinction, Level 2 Pass, Level 2 Merit, Level 2 Distinction.

If you do not wish to enter a grade for a particular unit just leave it blank.

Please ensure that you check the grade entered corresponds to the correct learner.

Once completed, save the file and return to the portal, selecting the file with the 'Choose File' and 'Upload submit unit grades' buttons which will enable the grades to be processed.

On screen will show the unit grades entered, please double check that all entered grades are correct before confirming with the tick box declaration and complete the full name of your Internal Quality Assurer (IQA) before selecting 'Submit'.

Certification

Make a Claim

You can make a certificate claim for your learners by selecting '**Certification**' from the Portal menu and clicking the '**Make a Claim**' option. Alternatively, you can also select the '**Claim my certificates**' option from the Portal homepage.

You will be taken to the Results search page. Here you can search for your learners by batch number, product code, product name, forename, surname, or date of birth. If you require further options, select '**Advanced**', and options to search on centre learner number, NCFE learner number, ULN, centre reference number, learner status and session will become available. You can search on one or more of these options.

Learner search

[Click the Advanced button for more search options.](#)

Batch	<input type="text"/>	Learner Forename	<input type="text"/>
Product Code	<input type="text"/>	Learner Surname	<input type="text"/>
Product Name	<input type="text"/>	Learner Date of Birth	<input type="text" value="dd"/> <input type="text" value="mm"/> <input type="text" value="yyyy"/>

Centre Learner Number	<input type="text"/>	Centre Reference Number	<input type="text"/>
NCFE Learner Number	<input type="text"/>	Learner Status	<input type="text" value="v"/>
Unique Learner Number (ULN)	<input type="text"/>	Session	<input type="text" value="v"/>

Your search results will show as below, select the learners that you would like to claim certificates for and click '**Submit**'. Please be aware that you can only claim for one product at a time. You can also view the ACE report from this page once your learners have been certificated. This is acceptable evidence for your Apprenticeship claims.

[< Refine Search](#)

Search criteria used: Batch 805627198, Product Code 603/3293/1.

<input type="checkbox"/>	Batch	ULN	Session	Name ▲	DOB	Product Code	Product Name	Current Status	Certificate Date	ACE Report
<input type="checkbox"/>	805627198		2021/2022	PORTAL GUIDE	01/12/2000	603/3293/1	NCFE CACHE Level 2 Technical Award ...	Registered		

Claiming Certificates for Non-Graded Products

Your selected learners will show as below, each one will have a new claim status depending on any previous certification history. You will need to select which learners you would like to mark the units for. You can select more than one learner at a time, but only if you are claiming the same units.

Select Learners

Select all learners Selected: 1

Select	New Claim Status	Name	ULN	Current Learner Status	
<input checked="" type="checkbox"/>	<input type="text"/>	PORTAL GUIDE		Registered	

When you have selected your learner(s), go to '**Mark units**'.

All units for this product will show and you will need to mark the units that you would like to claim. You can do this by clicking in the select box, clicking on the row or in the results column.

Where applicable, you can also add achieved units as being Credit Transfer, Equivalence or Exemption by selecting the relevant type of achievement.

When you have completed all the units for your learner(s) select '**Save Units**' and you will be taken back to the '**Claim learner certificates**' screen.

Units will be saved even if you don't make your claim at this point; please remember to always come back and make your claim so these can be sent to your EQA if needed and your certificate can be despatched.

Mark learner units

All learners selected will have the chosen units added to their record, if you do not wish to update some of the learners please return to claim learner certificates screen and remove the learners.

Please be aware that some units may have already been marked and claimed in our database; these units won't be affected.

[Back](#)

For information on how to achieve this qualification please refer to the qualification specification on the website.

Select all units

Selected: 0

Select	Mandatory	Results	TAG	Unit Code	Unit Name	Unit Level	Credit Value
Group 1							
<input type="checkbox"/>	Yes	A	<input type="checkbox"/>	K/601/2530	Explore Principles of Healthy Eating	Level 2	5
<input type="checkbox"/>	Yes	CT	<input type="checkbox"/>	J/601/2535	Consider Nutritional Needs of a Variety of Individuals	Level 2	4
<input type="checkbox"/>	Yes	Eq	<input type="checkbox"/>	M/601/2545	Use Food and Nutrition Information to Plan a Healthy Diet	Level 2	3

Achieved

[Clear](#)

[Save Units](#)

[Cancel](#)

[Credit Transfer](#)

[Equivalence](#)

[Exemption](#)

The '**New Claim Status**' field will now be populated for each learner you have claimed. The system will calculate this for you.

If you have selected any learners that are not ready for certification yet, they can be deleted from the claim by selecting the remove learner from claim icon. You can also amend the learner's name here.

You must confirm the address that you would like the certificates delivering to, complete the Internal Quality Assurer (IQA) name in full, tick the declaration box and submit. If you would like a Purchase Order Number to show on any certification orders, you can complete this here.

Click '**Submit**' when you've checked all information is accurate and you are ready to proceed.

Search Results

Product Name: NCFE CACHE Level 2 Award in Nutrition and Health
Product Code: 501/0038/5
DCS: No
Session: 2021/2022

Select Learners

Select all learners Selected: 1

Select	New Claim Status	Name	ULN	Current Learner Status	
<input type="checkbox"/>	Full	PORTAL GUIDE		Registered	
<input checked="" type="checkbox"/>	Partial	PORTAL GUIDE 2		Registered	

Mark Units

Choose Address and Internal Quality Assurer (IQA)

Select your delivery address:

(Main Address) Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT ▼

Internal Quality Assurer (IQA) name in full:

Purchase Order Number:

I declare that the Internal Quality Assurer (IQA) has confirmed that the learners' claims listed above are correct:

Submit

You can review your claim before it is finalised. It is worth checking that you have claimed all the units the learner has achieved, and the expected status is showing correctly. You can view the claimed units by selecting learner units. If you need to make any amendments, select '**Return to claim**' before proceeding. Otherwise select '**Claim Certificates**' to submit your claim.

Review your claim

[< Return to claim](#)

Product Name: NCFE CACHE Level 2 Award in Nutrition and Health
Product Code: 501/0038/5
DCS: No
Session: 2021/2022

The learners below will be included on your claim:

Batch	ULN	Name	DOB	New Claim Status	Learner Units
1	805627199	PORTAL GUIDE	21/09/2000	Full	
2	805627199	PORTAL GUIDE 2	01/01/2000	Partial	

[Claim Certificates](#)

Upon claiming certificates, the below confirmation message will be displayed. This will include claim reports detailing what has been claimed.

Thank you for your claim

You've now submitted your learner statuses, we will issue learner certificates based on this information.

You can download your claim report if needed.

- [Download claim report \(Excel\)](#)
- [Download claim report \(PDF\)](#)
- [Download learner status report \(Excel\)](#)
- [Download learner status report \(PDF\)](#)

[Leave your feedback here](#)

[Make another claim](#)

Claiming certificates for Graded products

Your selected learners will show as below, each one will have a new claim status depending on any previous certification history. This is automatically calculated and will show as **'Full'** or **'Partial'** depending on which units have had grades banked for them. The grade is the overall grade if the learner has achieved enough units for a full certificate.

[< Search Results](#)

Product Name: NCFE CACHE Level 3 Award in Childcare and Education
Product Code: 601/3998/5
DCS: No
Session: 2021/2022

Select Learners

Select all learners Selected: 0

Select	New Claim Status	Name	Grade	
<input type="checkbox"/>	Full	PORTAL GUIDE	A*	 
<input type="checkbox"/>	Partial	PORTAL GUIDE2		 

[View units](#)

You can view which units a learner has had banked, by selecting the learner and clicking on '**View units**'.

For information on how to achieve this qualification please refer to the qualification specification on the website.

Select all units Selected: 0

Select	Mandatory	Results	TAG	Unit Code	Unit Name	Unit Level
Group 1						
<input type="checkbox"/>	Yes	A*	<input type="checkbox"/>	F/506/5384	Child Development from Conception to Seven Years	Level 3
<input type="checkbox"/>	Yes	A*	<input type="checkbox"/>	J/506/5385	Children's Health and Well-Being	Level 3

You must confirm the address that you would like the certificates sending to and then select '**Claim**'. If you would like a Purchase Order Number to show on any certification orders, you can complete this here.

Choose Address

Select the address you want to use:

(Main Address) Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT ▼

Purchase Order Number:

You can review your claim before it is finalised. It is worth checking that you have claimed all the units the learner has achieved, and the expected status is showing correctly. You can view the claimed units by selecting learner units. If you need to make any amendments, select '**Return to claim**' before proceeding. Otherwise select '**Claim Certificates**' to submit your claim.

Review your claim

[< Return to claim](#)

Product Name: NCFE CACHE Level 3 Award in Childcare and Education
Product Code: 601/3998/5
DCS: No
Session: 2021/2022

The learners below will be included on your claim:

Batch	ULN	Name	DOB	New Claim Status	Learner Units
1	805627201	PORTAL GUIDE	01/01/2000	Full	
2	805627201	PORTAL GUIDE2	02/02/2000	Partial	

[Claim Certificates](#)

Upon claiming certificates, the below confirmation message will be displayed. This will include claim reports detailing what has been claimed.

Thank you for your claim

You've now submitted your learner statuses, we will issue learner certificates based on this information.

You can download your claim report if needed.

- [Download claim report \(Excel\)](#)
- [Download claim report \(PDF\)](#)
- [Download candidate status report \(Excel\)](#)
- [Download candidate status report \(PDF\)](#)

[Leave your feedback here](#)

[Make another claim](#) 

Claiming Certificates for V Cert Products

Your selected learners will show as below. Your learners will be displayed with a '**New Claim Status**'. This is automatically calculated and will show as '**Full**' or '**Partial**' depending on which units have had grades banked for them.

The grade is the overall grade if the learner has achieved enough units for a Full Certificate. If you select a learner, you can see the grades for each unit that has been banked. If you don't wish to claim for a learner at this time, you can remove them from the claim by selecting the remove learner from claim icon.

Select Learners

New Claim Status	Name	Grade	
Full	PORTAL GUIDE	Distinction*	 
Partial	PORTAL GUIDE2		 

Mandatory	Grade	Unit Code	Unit Name
Yes	Distinction	T/507/2655	Customer Service in Travel and Tourism
Yes	Distinction	A/507/2656	The UK Travel and Tourism Industry
No	Distinction	F/507/2657	Travel and Tourism Destinations
No	Distinction	J/507/2658	Promotion in Travel and Tourism
No	Distinction	L/507/2659	UK Purpose Built Visitor Attractions
No	Distinction	F/507/2660	Understanding Package Holidays
No	Distinction	J/507/2661	Travel Agency Operations
No	Distinction	L/507/2662	Hospitality in Travel and Tourism
No	Distinction	R/507/2663	Organising an Event
No	Distinction	F/507/2674	Introduction to Guided Tours Impact of Travel and Tourism

You must confirm the address that you would like the certificates sending to and then select '**Claim**'. If you would like a Purchase Order Number to show on any certification orders, you can complete this here.

Choose Address

Select the address you want to use:

(Main Address) Test Q6, Quorum Business Park, Benton Lane, NEWCASTLE UPON TYNE, Tyne and Wear, NE12 8BT

Purchase Order Number:

[Claim](#)

You can review your claim before it is finalised. It is worth checking that you have claimed all the units the learner has achieved, and the expected status is showing correctly. You can view the claimed units by selecting learner units. If you need to make any amendments, select '**Return to claim**' before proceeding. Otherwise select '**Claim Certificates**' to submit your claim.

Review your claim

[< Return to claim](#)

Product Name: NCFE Level 2 Extended Certificate in Travel and Tourism
Product Code: 601/6267/3
DCS: No
Session: 2021/2022

The learners below will be included on your claim:

Batch	ULN	Name	DOB	New Claim Status	Learner Units
1	805627202	PORTAL GUIDE	01/01/2000	Full	
2	805627202	PORTAL GUIDE2	02/02/2000	Partial	

[Claim Certificates](#)

Upon claiming certificates, the below confirmation message will be displayed. This will include claim reports detailing what has been claimed.

Thank you for your claim

You've now submitted your learner statuses, we will issue learner certificates based on this information.

You can download your claim report if needed.

- [Download claim report \(Excel\)](#)
- [Download claim report \(PDF\)](#)
- [Download candidate status report \(Excel\)](#)
- [Download candidate status report \(PDF\)](#)

[Leave your feedback here](#) [Make another claim](#)

Certification - General Information

You can only claim certificates for up to 100 learners, from a single batch at any one time.

If you have Direct Claims Status (DCS) your claim will be sent straight to be printed, and your certificates will be issued. Your eCertificates will be available to view immediately.

If your centre does not have DCS for the product you are claiming for, you can still claim certificates using Online Certification. Your claim will be sent to your External Quality Assurer (EQA) who'll be able to 'sign off' the claim following an EQA review (if required). Certificates will then be sent to print, and your eCertificates will be available to view.

I would say once your claim has been signed off, certificates will be printed and despatched the next working day.

Certification claims received before 6pm will be printed and despatched the following day. Timescales for centres outside of the UK will vary.

Viewing Previous Claims for Certificates

You can view your certificate claim history by selecting '**Certification**' from the Portal menu and clicking the '**Previous Claims**' option.

Here you can search for previous claims using batch number, session, product code, learner forename and/or learner surname.

After searching and locating your previous claims, you can access the claim report by downloading it from the '**Download**' column in the search results.

Search Claims

You can search for your previous claims by entering one or more of the criteria below:

Batch	Session	Product Code	Learner Forename	Learner Surname	
<input type="text" value="805627202"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="Search"/>

Your search returned 1 result(s).

Session	Product Code	Product Name	Date claim submitted	Date claim confirmed	Download
2021/2022	601/6267/3	NCFE Level 2 Extended Certificate in Travel and Tourism	21 Sep 2021	21 Sep 2021	

eCertificates

You can view and download electronic versions of your learner's certificates by selecting '**Certification**' from the Portal menu and clicking the '**eCertificates**' option. To do this, you will need the eCertificates permission to be active on your portal user account.

Here you can search using batch number, learner forename, learner surname, NCFE learner number or product code.

On completion of your search, you can view your learner's eCertificate, by selecting '**View Certificate**' in the far-right column.

The eCertificate will be available to view as a PDF.

	Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Learner Status	Award Date	
<input type="checkbox"/>	805657218	MRH	A10	31 Mar 1971	106240343	603/5036/2	NCFE LEVEL 3 CERTIFICATE IN POLICING	Full	22 Dec 2021	View Certificate

Your search returned 6 certificates. Displaying page 1 of 1
You've selected 6 certificates

Your reference [Request Multiple eCertificates](#)

You can also download multiple eCertificates at once. To do this, select the learners you require, or you can '**Select all certificates on the page**' (the amount shown here will depend on how your permissions are set up), or if the amount of learners searched on results is more than one page, you can '**Select all certificates**'. You can also enter a reference to which will help identify this

request once processed

Select ▼ 805627944 Fo

Select all certificates on a page

Select all certificates

Once you have selected your learners, select the **'Request Multiple eCertificates'** option.

eCertificates

Batch	Forename	Surname	DOB	NCFE Learner Number	Product Code	Product Name	Learner Status	Award Date		
<input type="text" value="805657218"/>	<input type="text" value="Forename"/>	<input type="text" value="Surname"/>	<input type="text"/>	<input type="text" value="NCFE Learne"/>	<input type="text" value="Product Code"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input checked="" type="checkbox"/>	805657218	MRH	A10	31 Mar 1971	106240343	603/5036/2	NCFE LEVEL 3 CERTIFICATE IN POLICING	Full	22 Dec 2021	<input type="button" value="View Certificate"/>

Your search returned 6 certificates. Displaying page 1 of 1
You've selected 6 certificates

Your reference

You will receive an email when the multiple eCertificates are available. Go to **'Download eCertificates'** from the **'Certification'** Portal menu.

While the request is being processed it will display as **'Pending'**, however once completed, **'Select Download Certificates'** and your requests will be there.

Please Note: eCertificates are only available for 4 hours after you have made the request.

Certification Downloads

Download your requested Certificates here. Downloads only stay active for 4 hours after the point of request

Requested date and time	Username	Download
23 Sep 2021 15:14	ryant	Pending

Managing Users

To create or edit users navigate to 'My Account', then 'Manage Users'.

From here you can Change your learner Administrator, create, edit and delete new users. Within this you can also change user permissions

Manage your users

You can create new users, edit current users' permissions and delete users.

Please be aware that all passwords must be kept confidential and each Portal user must only use their own login details. If you are the Portal administrator for your centre you must make sure that all of your centre's Portal users are aware of this requirement.

LRS Administrator

Your centre's LRS Administrator is currently **unassigned**. [Change LRS Administrator](#)

Users

Create a new user

Name	Username	Email Address		Delete	All None
Portal User Guide		Portal@useguide.com	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	<input type="checkbox"/>

To create a new user, select the 'Create a new user' button and the following appears

Create new user X

Full name

Email address

Username

Permissions (All | None)

- Search
- Product Registration
- Registrations: Tribal/Bulk CSV
- My Learners
- Bookings
- Assessment Results
- Moderation
- Submit Unit Grades
- Claim Certificates
- Read Only Certification Area
- eCertificates
- Users
- MIS Registration

You can then enter the persons name, email address and desired Username here.

You can give them the following permissions:

- Search – Access to the search screen which allows a user to view batches, reports and results
- Product, Tribal/Bulk & MIS Registration – Allow a user to register learners onto the portal via the Key-in, Bulk CSV and MIS registration methods.
- My Learners – Allow a user to search and edit a batch's details such as transfer, cancelling, withdrawing as well as editing any details. This also includes adding any paper modifications or access arrangements.
- Bookings – Allow a user to make a booking for a registered learner onto a controlled or external assessment.
- Assessment Results – Allow a user to view the results of a learner's assessment
- Moderation – Allow a user to submit a schedule of assessment and grades for T-Level assessments
- Submit Unit Grades – allow a user to submit user grades for non-T-Level qualifications
- Claim Certifications – allow a user to submit a claim for a certification
- Read only Certification Area- allow a user to view the Certification screens without being able perform any functions
- eCertificate – Allow a user to view and download learner certificates
- Users – Allow a user to access the Users page to which would allow them to give and take permissions or delete users.

Once you have decided which permissions are to be given and details are correct, select 'Save'. After a brief moment the changes will update on the system and the process completed

Document information

All the material in this publication is copyright© NCFE 2021.

Owner: Product Owner

Change History Record

This section summarises the changes to this document since the last version.

Version	Description of change	Approval	Date of Issue
V1.0.0	Updated guide with new NCFE branding	Product Owner	October 2021
V.1.1.0	Updated Controlled Assessment section	Product Owner	October 2021
V.1.2.0	Updated Saved units in Certification	Product Owner	October 2021
V.1.3.0	Updated Booking information, Submit grading and Search	Product Owner	November 2021
V. 1.3.5	Updated Functional skills text	Product Owner	November 2021
V. 1.4	Updated Registrations, bookings and eCertification sections	Product Owner	January 2022
V. 1.5	Updated information on controlled assessments and registrations	Product Owner	January 2022
V. 1.6	Updated information on registration and results	Product Owner	March 2022
V. 1.65	Updated information on submission of grades	Product Owner	March 2022
V1.7	Updated information on submission of grades via CSV and User Permissions added	Product Owner	April 2022
V1.8	Updated Controlled assessment and DCS information text	Product Owner	May 2022