

X C F E

T Level Portal and Online Assessment User Guide

**April 2022** 



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#### **The Portal - Introduction**

The Portal is a secure website which allows you to:

- register learners
- book learners for external assessment
- view learner results for external assessment
- · submit internal units for graded qualifications
- 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 <a href="https://portal.ncfe.org.uk">https://portal.ncfe.org.uk</a>.

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

This guide details all the stages you need to follow for the following T Level<sup>1</sup> Technical Qualifications:

- T Level Technical Qualification in Education and Childcare (Level 3) (delivered by NCFE)
- T Level Technical Qualification in Digital Business Services (Level 3) (delivered by NCFE)
- T Level Technical Qualification in Digital Support Services (Level 3) (delivered by NCFE)
- T Level Technical Qualification in Health (Level 3) (delivered by NCFE)
- T Level Technical Qualification in Healthcare Science (Level 3) (delivered by NCFE)
- T Level Technical Qualification in Science (Level 3) (delivered by NCFE)

The T Level Technical Qualification is a qualification approved and managed by the Institute for Apprenticeships and Technical Education.

<sup>&</sup>lt;sup>1</sup>T Level is a registered trademark of the Institute of Apprenticeships and Technical Education.

## 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 website (<u>www.ncfe.org.uk</u>).
- Select 'Portal' from the list of options available.
- Click '**Register here**' from the Portal log in page.
- Complete the requested fields and click send.

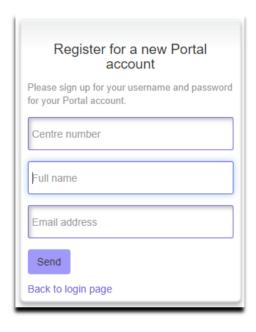
If you are the first person to request login details at your centre, you'll be set up as the Portal Admin user by our NCFE Customer Support team.

Otherwise, your request will be sent to the Portal Admin user at your centre, who will be responsible for creating your account and assigning you the appropriate permissions.

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'll see a message confirming your account is now active. Click 'Finish' to complete the process.

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



#### 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'll 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.

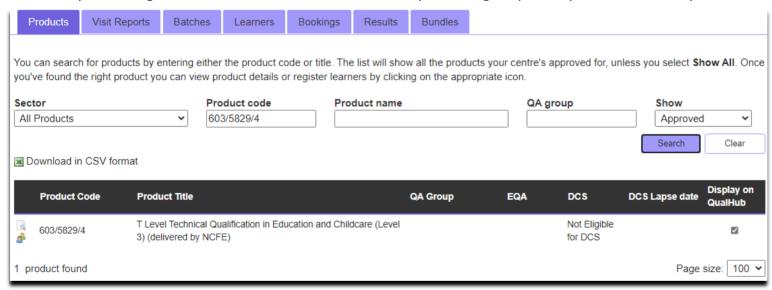
If you need to set up a user to only access information on QualHub (<a href="www.qualhub.co.uk">www.qualhub.co.uk</a>), please set them up as a user with no permissions.

#### 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.



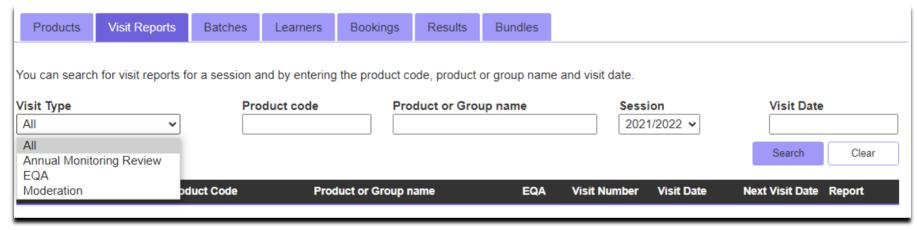
This screen shows important information about your QA Group, EQA, DCS status and DCS lapse date (where applicable). You can also view your EQA/Moderator contact details by clicking on the EQA name.

If a product is ticked in the '**Display on QualHub'** column, this means your centre details will show on QualHub as a centre who is approved to deliver this product. This enables learners to see where they can study a qualification. If you would not like your centre details to show on QualHub you can untick this.

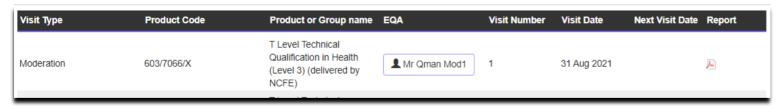
## Visit Reports

You can search for a visit report by selecting 'Search' from the Portal menu and clicking the 'Visit Reports' tab.

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.



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.

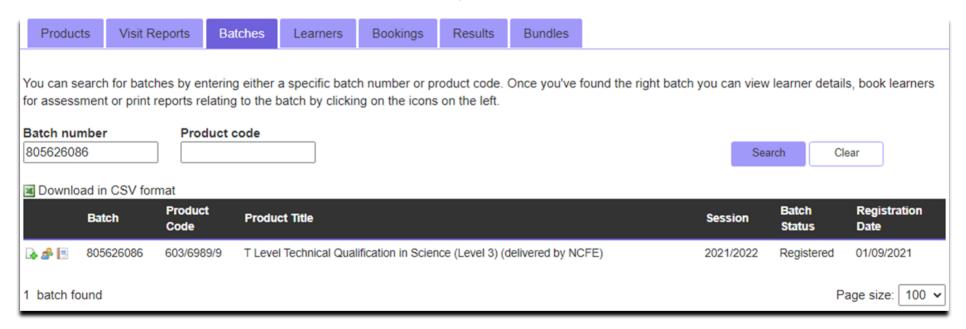


#### **Batches**

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.

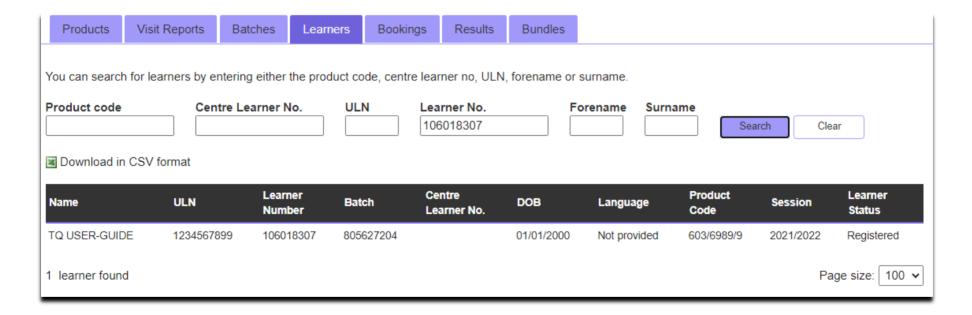


#### Learners

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.

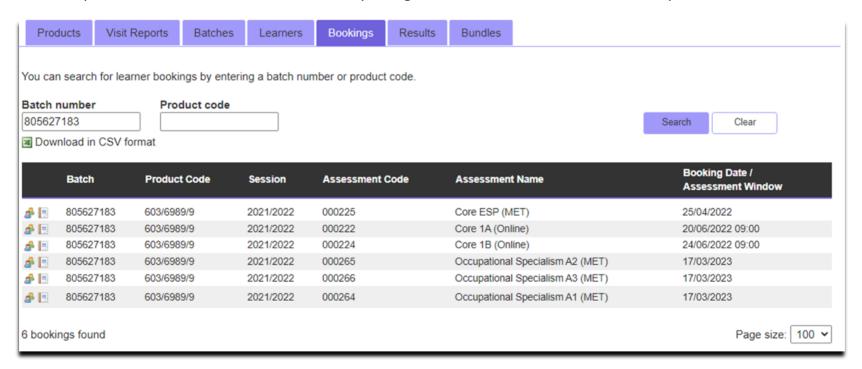


## **Bookings**

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 or Product Code. 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.



## Registrations

## Background

There are currently two different ways\* you can register your learners onto a T Level qualification:

- 1) **Upload via CSV file** this option allows you to upload your learners using a CSV file (RECOMMENDED)
- 2) **Key in** this option allows you to manually enter learners' details on to a batch

\*Although we also offer Tribal/Bulk CSV upload for other qualifications, this method of registration is not currently available to users when registering learners onto a T Level qualification.

When registering your learners onto a T Level qualification you will be required to confirm which Core assessment series the learners will be booked for.

For the Core written exams (Paper A and Paper B) you will be required to confirm whether the learners will be completing the assessments online or in paper-based form. For the Core Employer-set Project (ESP) you will be required to confirm which project brief the learners will complete.

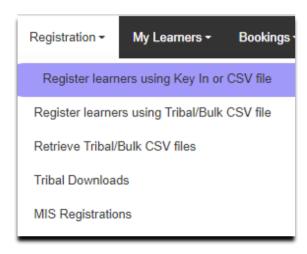
To complete a learner registration on a T Level qualification you must also provide a valid Unique Learner Number (ULN).

**Please note:** When registering your learners, you can only select one mode (online or paper-based) and one ESP brief per batch. Therefore, if you have some learners who prefer to complete assessments online, and some who prefer paper-based, then you will need to make separate registrations for each and chose the appropriate assessment series from the available list.

You also have the option to book learners onto their chosen Occupational Specialism assessment series if known at the point of registration. However, this can be done at a later date if this is unconfirmed by the learner at the point of registration.

## Register Learners Using Key In or CSV File

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



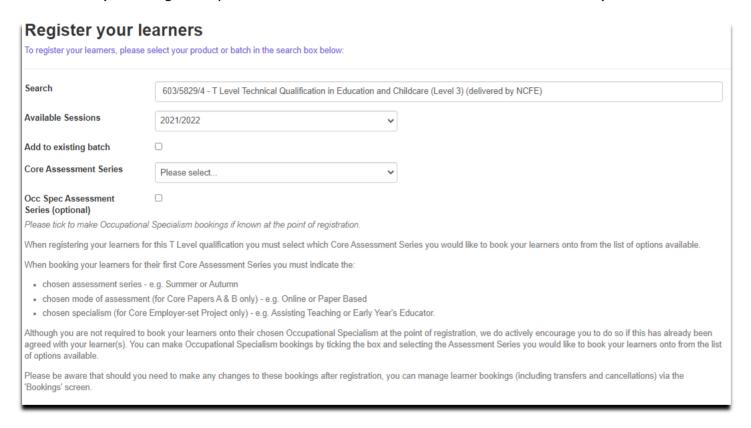
To register learners for a T Level qualification you can search for the product using the product code or product name. You can also tick the box to 'Add to existing batch', if you would like to add your learners to an existing batch. A batch number is a reference number we assign to a group of registered learners.



**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.

Once you have selected your T Level qualification, you must then select which Core assessment series you wish to book the learner on (including their preferred mode of assessment and chosen ESP brief).



If the Occupational Specialism is known at the time of registration, you can make bookings onto an Occupational Specialism series by ticking the 'Occ Spec Assessment Series' box. You will then be provided with a list of all available assessment series for the different specialisms available for your chosen T Level qualification.

You can add your learner information by either keying in this data or uploading a CSV file.

Add your learners									
Forename*	Middle names	Surname*	DOB* (dd/mm/yyyy)	Ethnicity	Gender*	Centre Learner Ref.	Unique Learner No. *		
		I		-	• -	<b>v</b>		Ad	ld
Jpload learners by ( Choose File No file chosen		Upload							
									Next C

Enter your learner's details into the fields and click the add button. All mandatory fields are marked with an asterisk (\*).

Another row of blank fields will now appear to complete for any additional learners you wish to register. If you enter learner details without selecting add, their details won't be saved when you complete the registration 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:

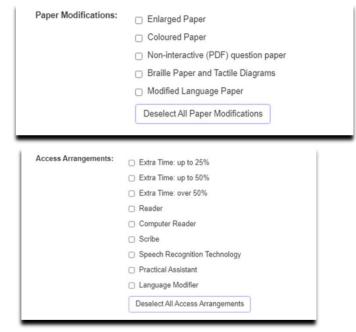
Select this icon to 'Add and amend learner details' which includes declaring Access Arrangements or Paper Modification requirements.

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.

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.





**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.

## Registering Your Learners Using a CSV File

Below is the format that you will need to use when creating your learner file when making registrations via the CSV upload method. You can leave the header row in the document when you import the CSV file.

The mandatory fields are forename, surname, date of birth, gender and Unique Learner Number (ULN). 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:

- **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'.



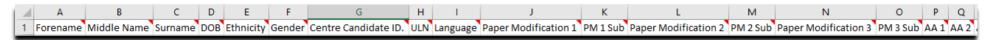
## Using the CSV Tool

The NCFE 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 access the NCFE CSV tool, select 'Support' from the Portal menu and click 'Download CSV tool'. An example of what this looks like is available in the 'Support' menu under using 'CSV File Example'.



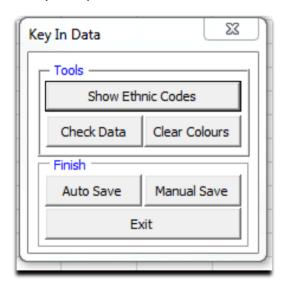
You will then be presented with a Microsoft Excel Security Notice, and you must select the option to 'Enable Macros' to continue.

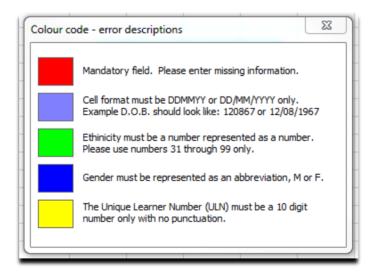
A Microsoft Excel sheet will then open. Select '**Add-ins**' from the menu options across the top of the sheet. This will open the NCFE CSV Tool. From the dropdown select the relevant field. The tool will then open, and the header rows will now show.



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 amends to data is required. Once you have made the required amendments your file will be ready to upload.

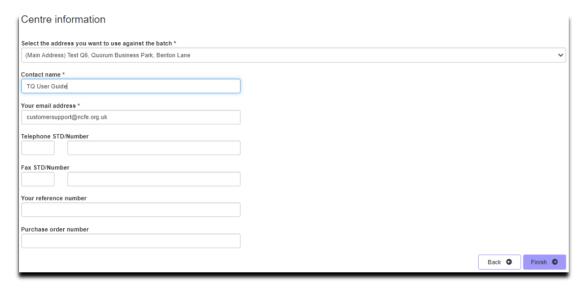




Once you have entered your learners details, Proceed to 'Register Learners Using Key In or CSV file' and either manually via the key in method or via the upload CSV file, you must click '**Next'** to proceed.

You'll then see the below 'Centre Information' screen. You must add the address where the assessment(s) will take place in the 'Assessment Location' field (this is a free text box). If this is the same as the delivery address you can click to confirm, to avoid having to re-enter the address.

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).



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 in other areas of the Portal when searching for learners, booking external assessments, and viewing results.

This page will also display any paperwork associated with this batch of learners including:

External Assessment Confirmation Reports

- External Assessment Invigilators Register (paper-based assessments only)
- Order and Order Summary reports

You may wish to print or download copies of these for your records. Alternatively, you can access them at a later date using the '**Search**' tab.

#### Learner registration complete

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

Your learners are registered on batch number: 805627205

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 ORD001436426
- . Learner Status Report
- Order Summary
- Certificate Claim Form

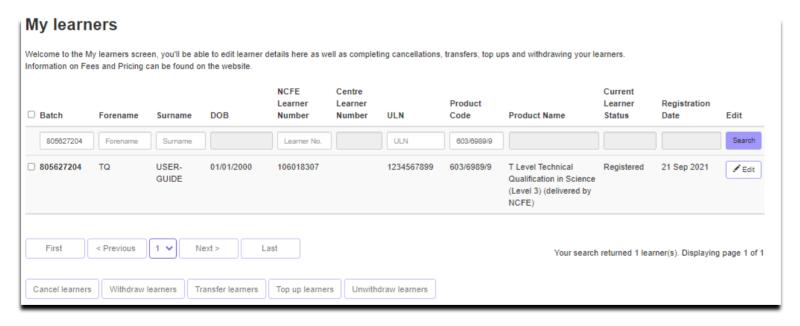
## **My Learners**

#### 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 edit their details or cancel a learner's registration.

**Please Note**: The option to withdraw and transfer learner registrations to a different product is disabled on this screen for T Level qualifications. Please follow the cancellation process.

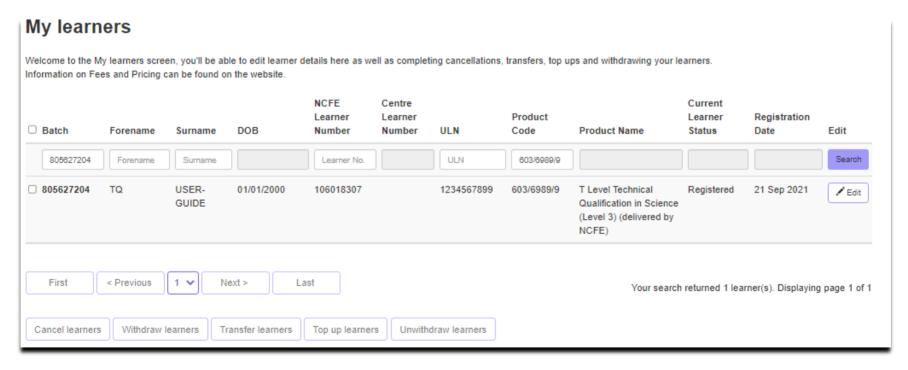


#### **Cancel Learners**

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 registration is cancelled, this action cannot be undone. The learner registration fee for a T Level qualification will be refunded in full if the cancellation is processed between 01 September and 31 January each calendar year. Any registrations cancelled outside of this period will not be refunded.

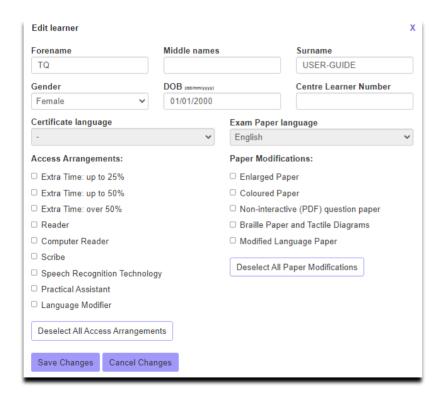


#### **Edit Learners**

You can edit learner registrations 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.

Within this screen you can edit 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.

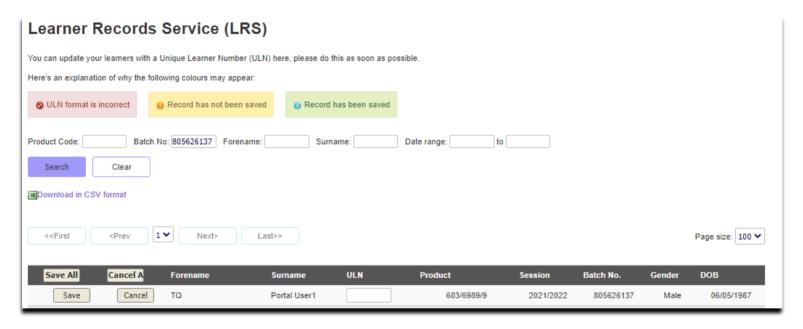


#### Manage ULNs

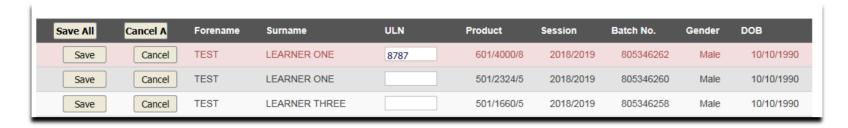
You can manage your learner ULNs by selecting 'My Learners' from the Portal menu and clicking the 'Manage ULN' option.

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.



You can amend a learner's ULN by overwriting the existing ULN before clicking to 'Save' on each row individually or by selecting 'Save All'. If you try and save a ULN in an incorrect format (i.e. less than 10 digits or starting with a 0) the ULN field will turn red.



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



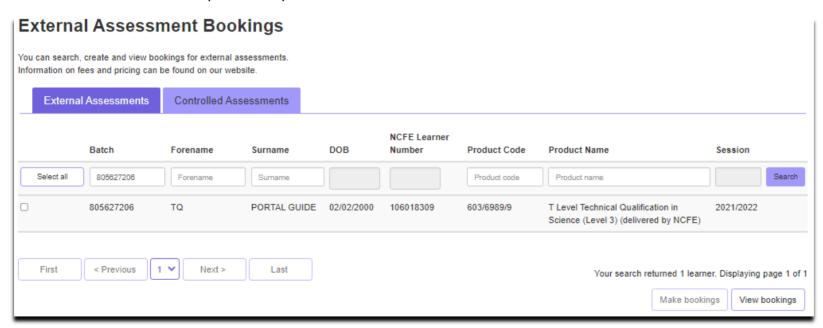
#### **Bookings**

#### Booking Your Learners for External Assessments

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

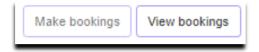
You can search for your learners to create new bookings using batch, forename, surname, product code and product name. Only learners that are registered on a product with external assessment components will be displayed.

From this screen you can book learners for an Occupational Specialism assessment series post-registration or book any learner resits for the Core and Occupational Specialism assessments.

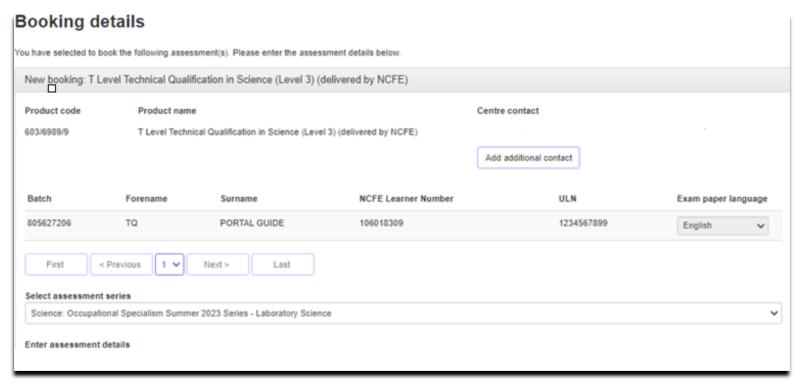


After searching for your learner(s) you can then click to select the learners you wish to create new or view existing bookings for. When searching for a batch of learners, you have the option to select all learners on the page, or all on the batch.

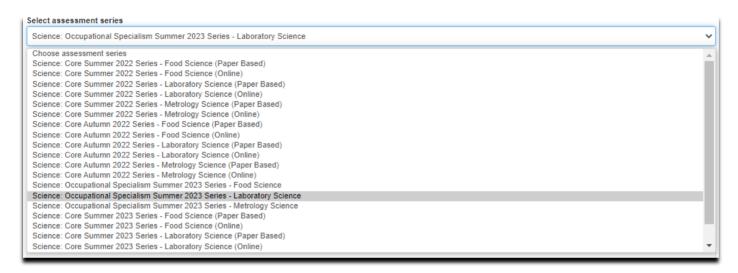
Once you've selected your learners, you will have the option to 'Make bookings' or 'View bookings'.



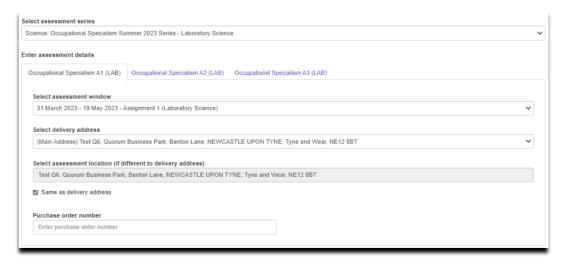
To make a booking after selecting your learners, click 'Make bookings' and you will see the 'Booking details' screen.



When making a Core or Occupational Specialism assessment booking, you must select the chosen assessment series from the list of options available. Several different options will appear covering the various series, modes and specialism options that are available.



When booking for paper-based assessments, you will be required to confirm the delivery address, where you would like the assessment paper(s) delivering to. You will also need to complete the assessment location details. This is a free text field, but you can also select it to be the same as the delivery address if appropriate.



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: Assessment Product Code **Product Name** Assessment Component Window Location **Delivery Address** 603/6989/9 T Level Technical Qualification Occupational Specialism A1 31 March 2023 - 19 Test Q6. Quorum Business Park, Benton Test Q6. Quorum Business Park, Benton in Science (Level 3) (delivered (LAB) May 2023 -Lane, NEWCASTLE UPON TYNE, Tyne Lane, NEWCASTLE UPON TYNE, Tyne by NCFE) Assignment 1 and Wear, NE12 8BT and Wear, NE12 8BT (Laboratory Science) Purchase Order Number: NCFE Exam Learner paper Batch ULN Forename Number language Surname 805627204 TQ USER-GUIDE 106018307 1234567899 English

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). 805627204 Order Summary Occupational Specialism A1 (LAB) External Assessment Booking Confirmation Report TQ - Occupational Specialism A1 (LAB) External Assessment Invigilators Register TQ - Occupational Specialism A1 (LAB) Occupational Specialism A2 (LAB) External Assessment Booking Confirmation Report TQ - Occupational Specialism A2 (LAB) Occupational Specialism A3 (LAB) External Assessment Booking Confirmation Report TQ - Occupational Specialism A3 (LAB) External Assessment Invigilators Register TQ - Occupational Specialism A3 (LAB) If you need to notify us of any new or update us on any existing Access Arrangements / Reasonable Adjustments for your learners, you can do this via the 'Manage Learners' section within the 'My Learners' screen. These records must be kept up to date at all times and accurately reflect the needs of your learners, wherever applicable. Leave your feedback here Enter more learners

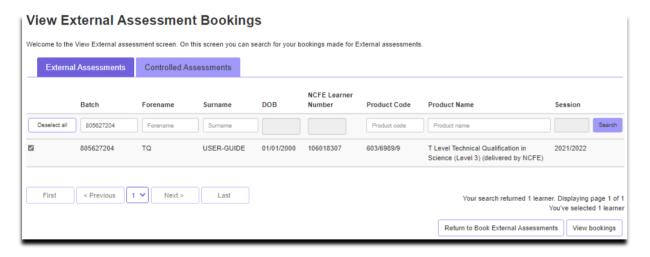
## View Existing Bookings

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.

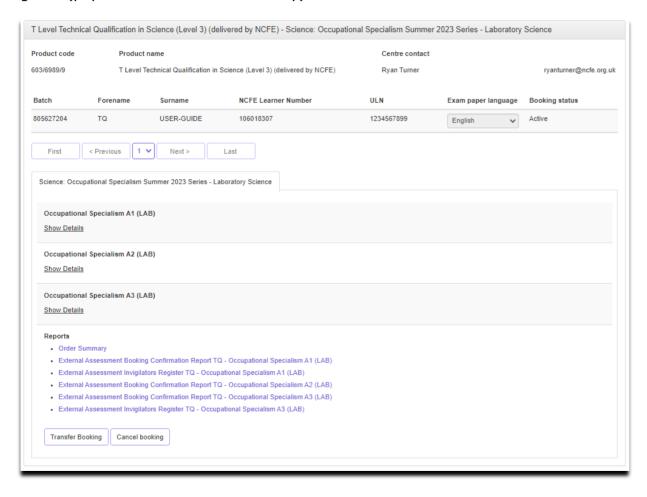
Once you've selected your learners, you will have the option to 'View bookings'.



To view existing bookings after selecting your learners, click 'View bookings' and you will see the 'View existing bookings' screen. The assessment series that your learner(s) is booked on will be displayed. Click the assessment series you wish to view the booking information for to display on screen.

This screen displays information relating to the booking including the current '**Booking status**', e.g. Active, Cancelled, Transferred, Pending Result or Result Issued.

To see more details on an individual assessment within the series, click the assessment and more information appears. You can also access and download copies of the assessment paperwork such as the Booking Confirmation Reports and Invigilator Register (paper-based assessments only).



## Late/Very Late Bookings

You can make assessment bookings after the advertised bookings cut-off date for your chosen assessment series has passed. Bookings made after the bookings cut-off date has passed, but before the assessment series begins are known as late and very late bookings.

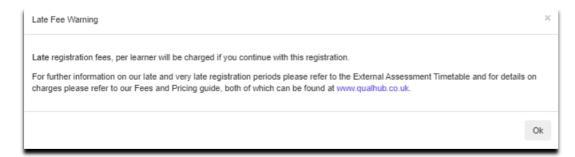
During the late booking period you can book as many learners as required (within 5 working days of bookings cut-off date having passed).

We will also accept up to a maximum of 20 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 series.

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 series which is within the 10 working days bookings cut-off period, the following message will be displayed:



If you click to 'Proceed with this window', you can complete your late/very late booking and the appropriate fees will be charged to your account.

# Cancelling a Booking

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

You can search for the learner bookings you wish to cancel using batch, forename, surname, product code and product name. Only learners that are registered on a product with external assessment components will be displayed.

To cancel an existing booking after selecting your learners, click 'View bookings' and you will see the 'View existing bookings' screen. The assessment series that your learner(s) is booked on will be displayed. Click the assessment series booking you wish to cancel.

#### View existing bookings

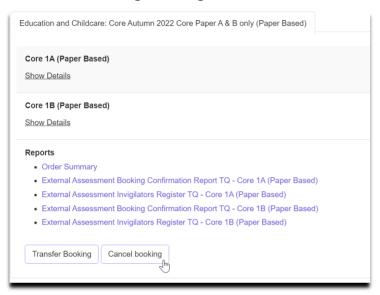
You can see which learners have been booked for an external assessment below. If you need any help, please contact Customer Support.

T Level Technical Qualification in Education and Childcare (Level 3) (delivered by NCFE) - Education and Childcare: Core Summer 2021 Series - Assisting Teaching (Paper Based)

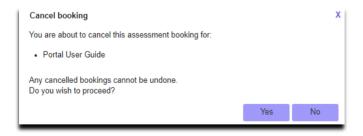
T Level Technical Qualification in Education and Childcare (Level 3) (delivered by NCFE) - Education and Childcare: Occupational Specialism Summer 2022 Series - Assisting Teaching

Bookings are cancelled at the 'Assessment Series' level. For example, when cancelling a learner's Core assessment series booking, they will be cancelled for each of the Core assessments that make up that series; Core Papers A & B and Core Employer-set Project.

To cancel an existing booking click the 'Cancel booking' as shown below:



A warning message will appear confirming that the action cannot be undone and asking if you wish to proceed. Click 'Yes' to proceed with cancelling the booking or 'No' to return to the 'View existing bookings' screen.



**Please Note**: After cancelling a learner booking it will still be displayed on the 'View existing bookings' screen, however the status of the booking will show as 'Cancelled'.

## Transferring a Booking

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

You can search for the learner bookings you wish to transfer using batch, forename, surname, product code and product name. Only learners that are registered on a product with external assessment components will be displayed.

To transfer an existing booking after selecting your learners, click 'View bookings' and you will see the 'View existing bookings' screen. The assessment series that your learner(s) is booked on will be displayed. Click the assessment series booking you wish to transfer.

#### 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.

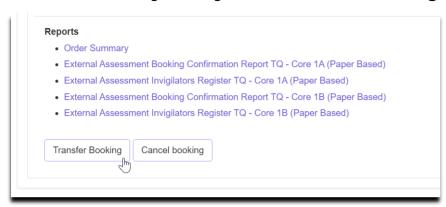
T Level Technical Qualification in Education and Childcare (Level 3) (delivered by NCFE) - Education and Childcare: Core Summer 2021 Series - Assisting Teaching (Paper Based)

T Level Technical Qualification in Education and Childcare (Level 3) (delivered by NCFE) - Education and Childcare: Occupational Specialism Summer 2022 Series - Assisting Teaching

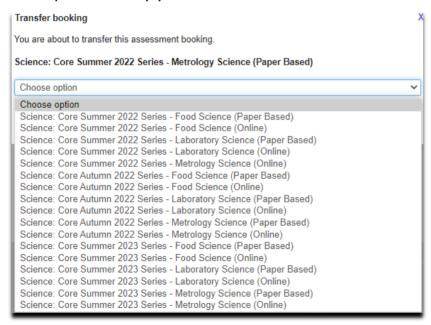
You may wish to transfer a learner's booking for a number of reasons including a change of series, a change of specialism or a change of assessment mode.

Bookings are transferred at the 'Assessment Series' level and can only be transferred to an Assessment Series of the same type e.g. from one Core Assessment Series to a different Core Assessment Series or from one Occupational Specialism Assessment Series.

To transfer an existing booking click the '**Transfer booking**' as shown below:

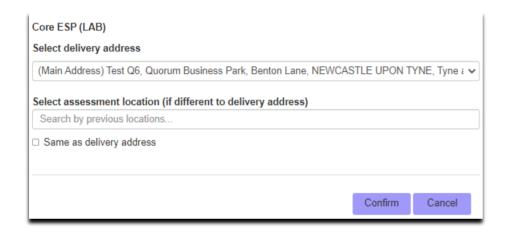


You will then be required to select which alternative Assessment Series you would like to transfer the learner(s) to. You will be presented with all available options appropriate to the existing booking as shown below. Click to select the one you wish to transfer your learner(s) to.



Once you have clicked to proceed, you will be asked to confirm the delivery address (for paper-based bookings only) and assessment location before you complete the transfer. You will need to do this for each assessment component.

Click 'Confirm' to proceed with transferring the learner bookings or 'Cancel' to return to the 'View existing bookings' screen.

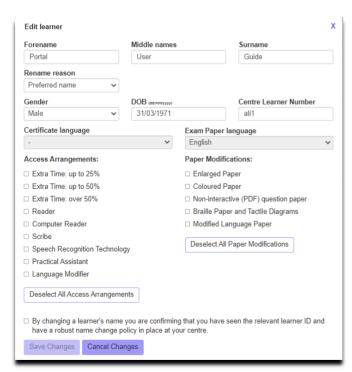


# View, Add and Amend Access Arrangements and Paper Modifications

You can view, add and amend learner Access Arrangements and Paper Modifications by selecting 'My Learners' from the Portal menu and clicking

the 'Manage Learners' option.

After searching for the learner(s) you wish to view, add or amend Access Arrangements or Paper Modifications for, tick the box to the left of the learner(s) name and click the button to '**Edit**' to amend learner details.



Within this screen you can view, add or amend Access Arrangements and Paper Modifications for an individual learner. If an Access Arrangement or Paper Modification was added at the point of registration, this will be pre-selected in this screen.

To add or amend Access Arrangements or Paper Modifications, select the appropriate options from the available list and then click to 'Save Changes'. To select multiple options, mark the tick box beside each option that applies to your learner before clicking to save.

You can remove all currently selected Access Arrangements or Paper Modifications using the 'Deselect All Access Arrangements' or 'Deselect All Paper Modifications' buttons (where required).

#### **Results**

## Viewing Results

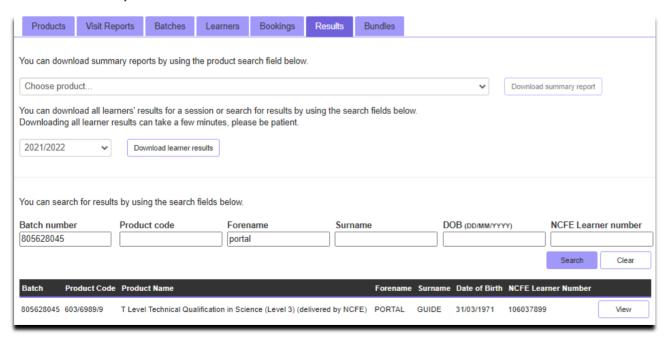
You can view your learner results by selecting 'Results' from the Portal menu.

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

**Please note:** Results are only available in the Portal on or after the advertised results release date for any given assessment.

Please refer to the Key Dates Schedule on our website for more information on assessment and results release dates.

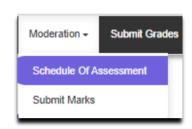


#### **Moderation**

#### Schedule of Assessment

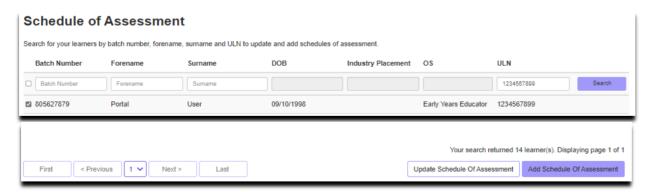
You can add and update your schedule of assessment for a learner by selecting 'Moderation' from the Portal menu and clicking the 'Schedule of Assessment' option.

**Please Note**: A Schedule of Assessment is only required for learners registered for the T Level Technical Qualification in Education and Childcare (Level 3) (delivered by NCFE), who are booked for the Early Years Educator and Assisting Teaching occupational specialisms. This is so that your Moderator knows when you are planning to assess your learners and so that the Moderator can plan their moderation visits and choose an appropriate sample.



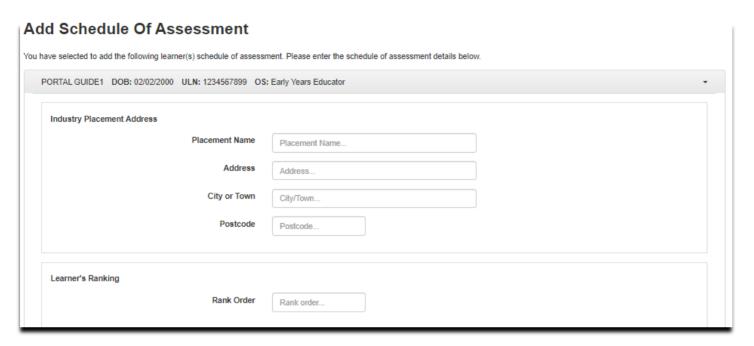
You can search for the learner(s) you want to add or update a Schedule of Assessment for by entering a specific batch number, forename, surname or ULN.

After searching for the learner(s) you wish to add or amend the Schedule of Assessment for tick the box to the left of the learner(s) name and click the appropriate buttons either 'Add Schedule of Assessment' or 'Update Schedule of Assessment'.



You will then be required to provide information relating to the learner's industry placement, including the name, address, and post code. You are also required to provide a 'Rank Order' for each learner to ensure your Moderator can

select an appropriate range of learners for their sample.

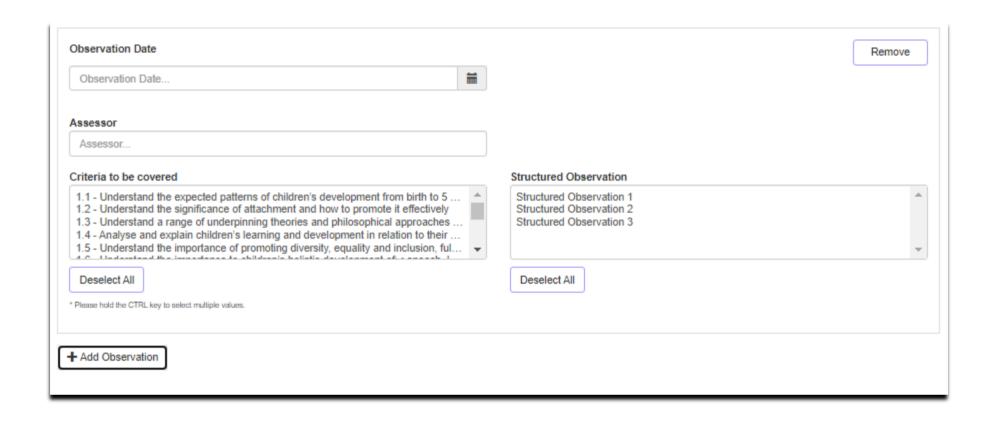


You can then select the button to 'Add Observation' to add the details of what you will be assessing your learner on and when.



Within this screen you must confirm the date and time of the planned observation in the 'Observation Date' field. You will be unable to save and submit a schedule of assessment without including this information.

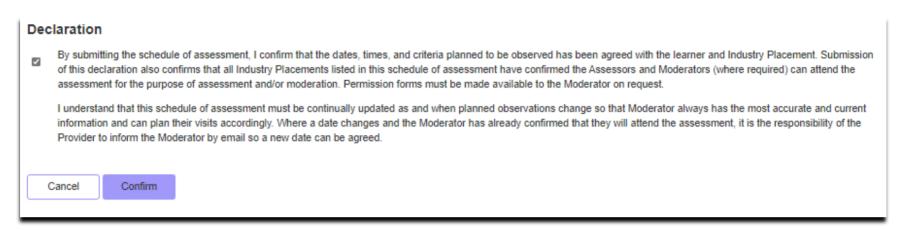
You should also provide the assessor's name in the '**Assessor**' field and the Criteria to be covered and/or Structured Observations being assessed on the date and time provided. This can be entered at a later point if this information is not confirmed at the point of submitting a schedule of assessment.



You can add additional observation records for the learner(s) by selecting the 'Add Observation' button.

To submit the Schedule of Assessment you must tick to confirm the declaration, confirming you have read and agree to the requirements.

Once you are happy all details provided are correct you can submit the Schedule of Assessment by clicking the 'Confirm' button.



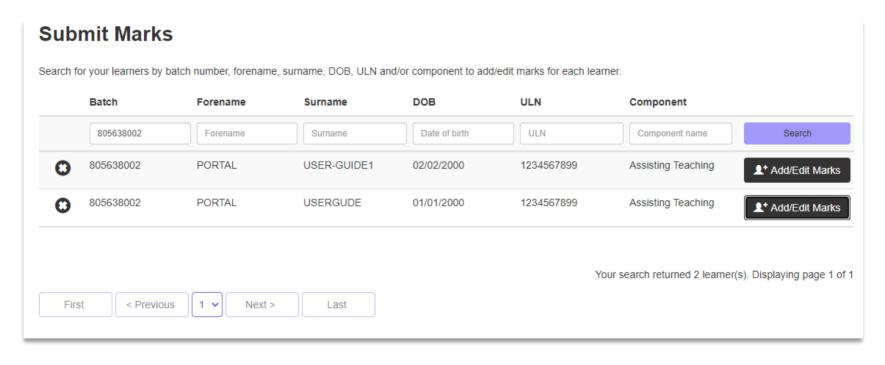
Upon completion you will see a confirmation message as shown below to confirm your submission has been successful.



#### **Submit Marks**

You can add marks for your chosen T Level qualification by selecting 'Moderation' from the Portal menu and clicking the 'Submit Marks' option.

You can search for the learners you want to submit marks for using batch, forename, surname, date of birth, ULN and/or Component. Only learners that are registered on a T Level qualification, with an active booking against an Occupational Specialism assessment series will be displayed.



When you have found the learner, you want to submit marks for, click the 'Add/Edit Marks' option. This will load a pop-up box for you to enter the marks.

A will be displayed against any learner which does not have a complete set of marks saved.

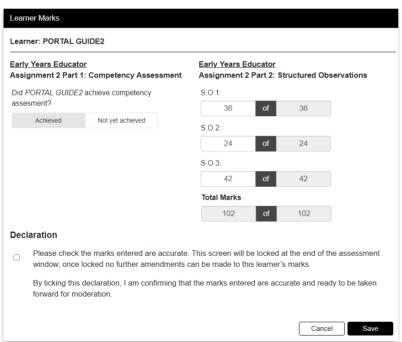
You are required to enter a numeric mark for each structured observation listed. Only marks within the accepted range for each structured observation will be saved. You must check the marks entered for accuracy before ticking to confirming the declaration. Then click the 'Save' option to save the marks you've entered.

Note: For the Early Years Educator specialism option, there is an additional Competency Assessment for which you are required to confirm whether the learner has 'Achieved' or 'Not Yet Achieved'.

Once all marks (and grade for the Early Years Educator specialism) are saved, a tick icon will be displayed against the learner, to confirm you've entered all marks for the learner.



Should you need to edit any learner marks you've previously saved, you can do so up until the end of the moderation period as documented in the Key Dates Schedule on our website. Once the moderation period has ended this screen will be locked and no further changes can be made. In exceptional circumstances, NCFE may be able to re-activate this screen. An investigation will follow to identify why the error occurred.



#### Certification

You don't need to claim your learner's certificate with NCFE. Certificates will be issued by the Department for Education (DfE) upon your learner completing the qualification, providing they meet the minimum required standard.

Please visit the Department for Education website for more information on learner achievement and certification for T Level qualifications.

#### **Online Assessment - Introduction**

The online administration site for NCFE Online Assessment, where you can invigilate and administer learner assessments is called Surpass.

The secure software that learners use to take assessments is called SecureClient. SecureClient should already be installed on the devices you're using to run the assessments.

If any you require any assistance, please contact NCFE Customer Support team using the details at the bottom of this page.

You should be set up on Surpass by a member of your centre who is the designated Administrator for the system. Once they've done this you can either log in to Surpass from the top of the NCFE website homepage under the '**Log in**' section or save the direct link to Surpass: https://ncfe.surpass.com/.

We recommend you use Chrome or Firefox as the web browser – Edge is not guaranteed to work in full with the software.

To log in, you will need your username which you'll have received through a notification email from <a href="mailto:noreply@surpass.com">noreply@surpass.com</a>. You will also need to set a password up. If you need to reset your password for any reason, you can do this from the log in screen under the 'Can't access your account' option.

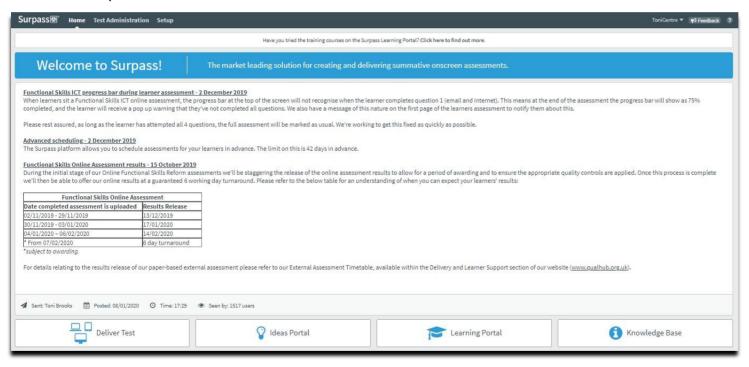
If you've not received any of the above emails or details, it's likely that your Administrator hasn't set you up yet, therefore you'll need to contact them to do this.



#### **Home Screen**

Once logged into Surpass you will see the home screen where NCFE will post information and updates about the system and online assessments. This is also where the learner software (SecureClient) is installed from; please see our Surpass Customer Manual – Installation for further guidance.

You will have a menu bar at the top of this home screen (dark grey). Depending on what role you have been set up with you will see several options on this bar.



**Home:** You can return to the home screen at any time by clicking on the home button.

**Test Administration:** You can view your test schedule.

**Set up**: You can view learners and users in your centre.

#### **Test Administration Screen - Schedule**

This screen is only applicable to non-T Level assessments. All T Level assessments must be booked and viewed through the NCFE Portal (see Bookings section).

If you need to check any details of a T Level online assessment, please view this through the NCFE Portal or contact NCFE Customer Support.

## **Test Administration Screen - Invigilation**

The Invigilation screen of Surpass allows you to access learner's keycodes, both onscreen and on printouts. It also allows you to monitor and control the progress of learners' assessments in real time.

T Level assessments will appear in the Invigilation screen 5 days before the scheduled start time of the assessment

On the invigilation screen, the purpose of some headings are as follows:

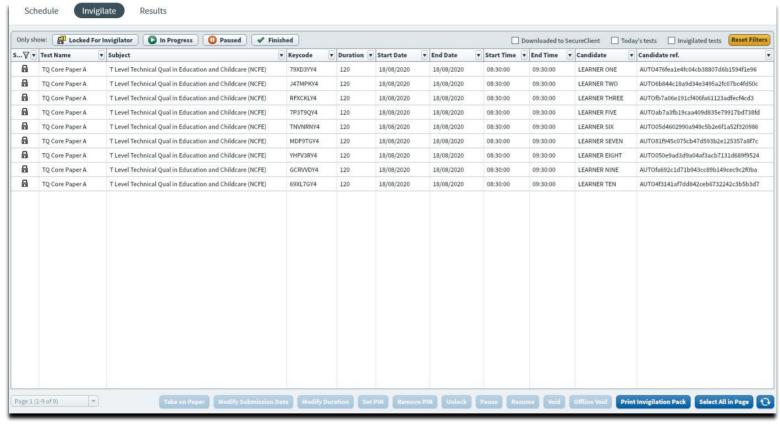
- **Test Name** refers to which paper the learner has been booked on
- **Duration** the length of the actual assessment
- **Start Date** the first date the assessment can be sat on
- End Date the last date the assessment can be sat on
- Start time the earliest time the assessment can be started
- End time the latest time the assessment can be started

**Please note:** T Level online assessments should begin at the published start time, as documented in the Key Dates Schedule. However, as detailed in our Regulations for the Conduct of External Assessments, centres are permitted to begin assessments, 30 minutes prior to, or later than, the published start time of the assessment. For assessment variation requests beyond this 30 minute, please complete and submit an assessment variation request form, available on our website.

## **Keycodes and Reports**

You'll be able to access your learners' unique keycodes from the 'Invigilate' screen. Each line on the screen relates to an individual learner's assessment.

You can provide a learner with their keycode directly from the screen or print an invigilation pack, which includes a keycode slip which can be issued to the learner.



You can print off an invigilation pack by highlighting the relevant assessment and choosing 'Print Invigilation Pack'. You'll be given the option to 'Create Invigilation Pack' using the selected assessment (the one highlighted on the screen) or using a wizard.

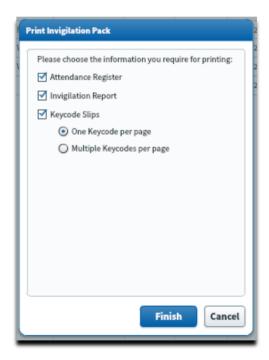


If you select 'Create Invigilation Pack using selected tests' you'll be shown this screen. This screen will give the option to print invigilation packs for an individual assessment.

You'll be given the option of choosing to print an 'Attendance Register', an 'Invigilation Report' and the 'Learners Assessment Keycodes':

- Attendance Register: this is an optional report to confirm the learner attended.
- **Invigilation Report**: this is an optional report for your internal invigilation records. This doesn't need to be returned to NCFE.
- **Keycode Slips**: these are the individual slips to give to learners with their keycodes which they'll need to log in to their assessment. You can select either one or multiple keycodes per page.

Once the options you need have been selected, click 'Finish' and the relevant files will open in a printable screen.



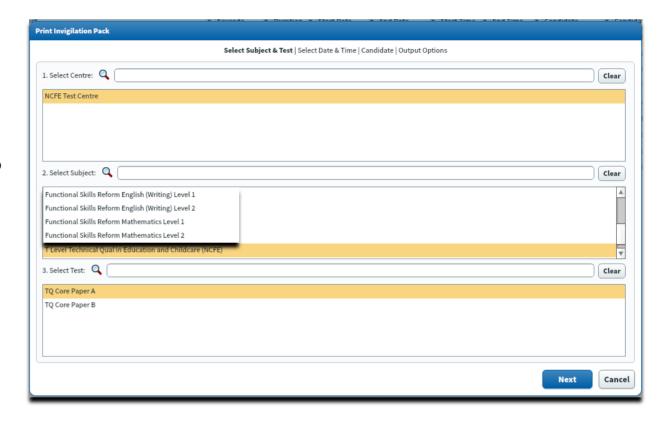
If you select 'Create Invigilation Pack using the wizard', you'll be shown a different screen where you'll be given various options.

Select your centre, qualification and the assessment and click 'Next'.

Another series of screens will allow you to select the time and date of the relevant assessment, then which learner(s) you would like to print the paperwork for.

Then you'll see the same screen as the above step, giving you options for which paperwork you'd like to print.

Once the options you need have been selected, click '**Finish**' and the relevant files will open in a printable screen.



# **Monitoring Assessments**

The Invigilation screen allows you to monitor the progress of your learners' assessments in real time for any assessments that are being run with a live internet connection. The screen will show when assessments have been downloaded for remote assessment and can be used to track answers being uploaded following those assessments being completed.

Each assessment will be in one of the following states;

Icon	State		
Locked For Invigilator	The assessment has been locked and will need to be unlocked by the invigilator before it starts, or the learner will need to enter the PIN number the invigilator has set		
•	The assessment is ready to start and the learner can log in using their Keycode		
In Progress	The assessment is in progress now, an additional icon will show if the internet connection has been lost whilst the assessment was in progress		
æ	The assessment window has closed and the system is expecting learners results to be uploaded		
	The assessment is finished and the learner results have been received		
*	The assessment has been voided and is not available to log in to, the learner can be rescheduled to a new assessment		
₿ 🛂	The assessment has been downloaded		
Paused	The assessment has been paused		

## **Modifying Assessments**

If a learner requires additional time as part of a Reasonable Adjustment, it must be done in the Invigilate screen. When an assessment is in the 'ready state, the 'Modify Duration' button becomes available.

This must be done before the assessment is started.

Once selected you'll be given the 'Edit Candidate Exam Duration' box.

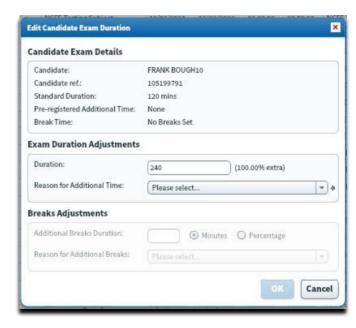
The '**Duration**' box will show the number of minutes that the test is currently booked for, which will be the standard number of minutes. Add into this the additional number of minutes that the learner requires (so it will show the total minutes overall). In brackets to the right of this box, it will show you how much you have increased the duration by, as a percentage. You can increase it up to 100%.

This duration must be increased in line with the NCFE Access Arrangements and Reasonable Adjustments policy and Guidance for Applying Access Arrangements and Reasonable Adjustments.

You will then need to add in the reason for adding the additional time, using the drop- down box.

Click '**OK**' and the additional time will show on the main screen in the '**Duration**' column.





## **Unlocking Assessments**

At the point an assessment is booked there is an option to set additional invigilation options, this allows extra levels of security above the unique learner keycode. If the 'schedule for invigilate' option is selected during the assessment booking, there are 2 ways you can unlock the assessment.

- 1) Select the assessment on the Invigilation screen and click the 'Unlock' button, the learner's assessment will then start.
- 2) Select the assessment on the Invigilation screen and click the '**Set PIN**' button. This means when the learner enters their keycode, SecureClient will also prompt them to enter a PIN, which can be supplied or entered by the Invigilator.

## Pausing Assessments

If something happens during an assessment, such as a fire drill, and you wish to pause the assessment you can do this with the '**Pause**' button. This will stop the timer and the learner will see a message on-screen to tell them the assessment has been paused.

You would then restart the assessment using the '**Resume**' button. This must be completed in line with the NCFE Regulations for the Conduct of External Assessment.

Please Note: Pausing assessments can only be done on assessments being sat online, not ones that have been downloaded.

#### **Test Administration Screen - Results**

This screen is only applicable to non-T Level assessments. Please see the Surpass Customer manual – Administration for information about this screen for other assessments.

If you have a query on results for a T Level online assessment, please view this through the NCFE Portal or contact NCFE Customer Support.

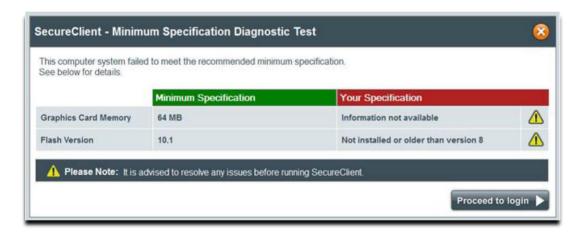
## **Starting Assessments**

To start SecureClient click on the NCFE Online Assessment shortcut icon on the desktop.

Each time you launch SecureClient it will automatically check that it's the most up to date version and will download and update itself if needed; this will usually take a few seconds but may take a little longer if it has not been launched for some time.



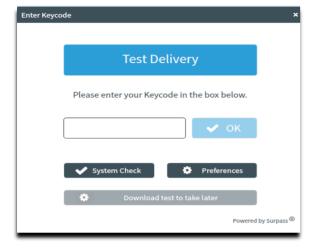
SecureClient will then perform a diagnostic check, to compare the specification of the computer to the specification required for the software to run correctly. If it discovers anything that doesn't meet the requirements you will see this message.



It's advised that any issues highlighted are resolved before trying to run assessments to avoid any impact on the learner experience. If you choose to proceed without taking any action you can click '**Proceed to login**'.

Assessments sat through SecureClient will record the specifications of the computer used to sit the assessment, to assist in any diagnostics that are required in the event of there being technical problems.

Once the diagnostic check is complete, you'll see the log in screen.



The 'System Check' button allows you to run another check on the specification of the device again, if needed.

The '**Preferences**' button allows you to change the colours that the assessment will display in, which may be useful for learners with visual impairments or reading difficulties. This can also be changed during the assessment.

To log in to an assessment, the learner will need to enter their unique learner keycode for that assessment.

Select '**OK**' and they'll see a confirmation screen to confirm their personal details. Once confirmed the system will begin the learner's assessment.

The first page of the assessment will always be an information screen and includes a tutorial that the learner can view to learn how to navigate the assessment.

The timer for the assessment will start as soon as the learner selects '**Start Test**' from the information screen. Online practice assessments are available to familiarise learners with the software and options available to them.

#### **Remote Assessments**

# Downloading Assessments for Remote Assessment

If you want to download an assessment so you can run this without an internet connection, this is done through SecureClient.

The SecureClient software will need to be installed on the device which will be used for the assessment (see the Surpass Customer manual – Installation for further information).

To download an individual assessment please enter the learner keycode and then select '**Download test to take later'**. This will download the assessment to the device.

Then when you're ready for the learner to sit the assessment, they can be without internet connection and launch SecureClient in the normal way. When they enter the keycode the assessment will load as normal, as it is stored on the device. The assessment can then be taken offline.

## **Uploading Assessments**

If a learner's assessment has been downloaded and sat offline, or if the internet connection dropped during an online assessment and was not restored before the assessment was completed, the learner's assessment will need to be uploaded.

In these cases, the Invigilation screen will either show 'User disconnected – in progress' or 'Awaiting Upload'.



To upload the assessment, you will need to either just connect to the internet or open the SecureClient software on the device the assessment was sat on. This will take anywhere between a few seconds and a few minutes depending on the number of assessments to upload and the speed of your internet connection.

Close the SecureClient software.

You can check the assessment on the Surpass Invigilate screen; if the results have been uploaded, you'll see a green tick to show it's finished.

You have 30 days from the end of the assessment window to upload the learner's assessment. If it isn't done by this point, the system will automatically void the learner's assessment and they will not be issued with a result.

If your assessment does not upload, please contact NCFE Customer Support immediately.

## **Loss of Internet Connection During Assessments**

SecureClient has a function which means that if a device crashes while learners are sitting an assessment, they can log back in and continue from where they left off. Also, if there's an interruption to your internet connection during an assessment the learner will be able to continue as if nothing had happened. As long as the internet connection is restored before the end of the assessment, the assessment will be uploaded automatically to NCFE as normal.

If the internet connection is still offline when the learner completes their assessment, the assessment won't have been uploaded to the Surpass system. The assessment will be stored on the device used to sit the assessment, as it would in the above step when an assessment is downloaded to sit offline.

As above, open the SecureClient software on the device the assessment was sat on let it load, then close the software.

## **Troubleshooting**

Problem	Cause	Solution
		Delete the installation directory and reinstall as an Administrator.
a test keycode or when logging into Administration screen.	compact (either an old & incompatible version was	Resolved by installing SQL Compact Service Pack 2 from the Microsoft website

Error '827' is shown when validating the test keycode.	Caused by SecureClient running offline and the test not downloading. This can be due to a variety of reasons, but the most common cause is due to the	Check the keycode and try again. Resolved by entering proxy details in the proxy form or the proxy.xml file or by allowing access to the central server URLs through the proxy.
SecureClient has updates that are invalid	Caused by insufficient permissions on the SecureClient folder or because a lower-level user account is being used. Caused by a proxy server blocking access to an update's URL.	Resolved by granting read/write permissions on the SecureClient folder or by logging in with a user with higher permissions.
SecureClient failed to load (no error message)	Caused by standards and format settings being non-UK. Specifically the character used to mark a decimal place is a comma (,) rather than full stop (.)	Resolved by changing the Standards and Formats settings to United Kingdom
Error '821' - Secure Client Core - There was an error trying to decrypt an item for the current question.	Caused by an on-access virus scan preventing the SecureClient from reading/writing files	Delete the installation directory and reinstall as an Administrator.
Tests appear as 'In progress/User disconnected' in the Invigilation screen, although the tests have actually been completed.	Caused by a lost or slow internet connection when the exam was submitted by the learner.	Check there is an internet connection available and relaunch the SecureClient on the computer used by the learner. The result should then be uploaded, you can
Keycode is not working, message displays 'keycode is invalid'.	Caused by the window being 'closed' or the incorrect version of SecureClient is being accessed.	Check the window for the assessment is current and make sure the version of SecureClient

#### **Document information**

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## **Change History Record**

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

Version	Description of change	Approval	Date of Issue
V1.1	Additional content added for Moderation: Schedule of Assessment are within the Portal.	Product Owner	September 2021
V1.2	Updated guide with new NCFE branding	Product Owner	October 2021
V1.3	Updated to include content within Moderation section regarding Submitting Marks	Product Owner	January 2022
V1.4	Updated content within Online Assessment: Home screen section	Product Owner	March 2022
V1.5	Updated content within Surpass section	Product Owner	April 2022

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