

DELIVERY PERFORMANCE REPORT- CURRICULUM MANAGER

OVERVIEW

Smart provide the opportunity for Curriculum Managers to access caseload management information enabling those with role to support and manage assessors.

PREPARATION

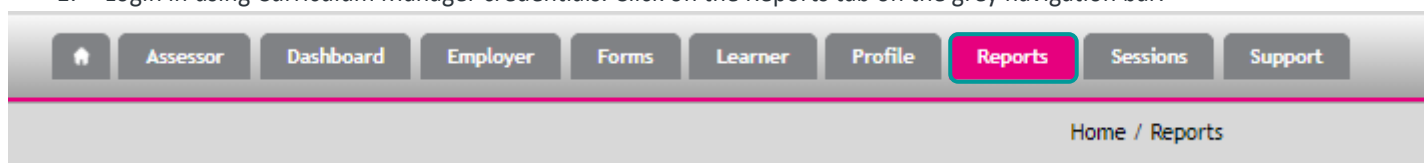
Curriculum Manager login credentials, Assessors and their caseload linked to the Curriculum Manager role.

USER RESTRICTIONS

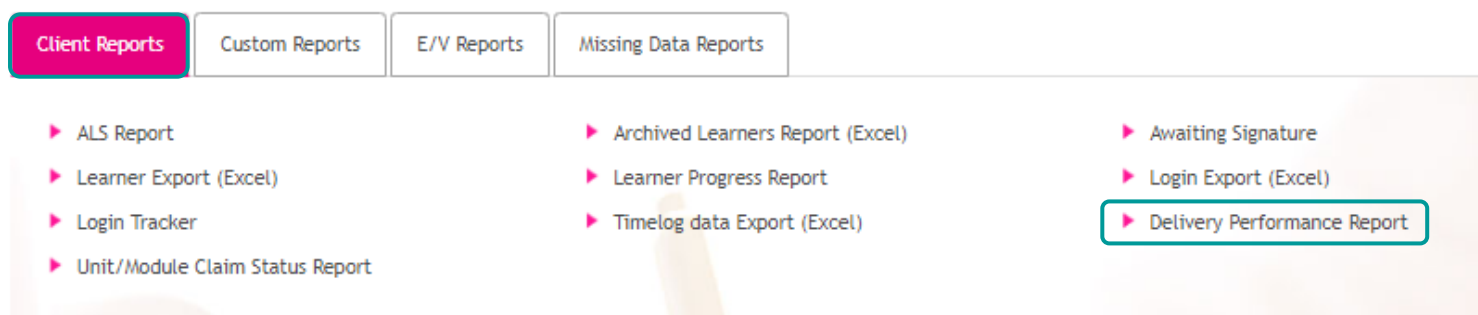
Curriculum Manager- only has access to Assessors linked to the Curriculum Manager role.

DETAILS

1. Login in using Curriculum Manager credentials. Click on the Reports tab on the grey navigation bar.



2. Select client reports then, select the Delivery Performance report option.



3. This needs to be reworded. Within the Delivery Performance Reporting page there is the ability to set filters to drill down to specific data related to the Assessors. Once a selection has been made, press submit. (**Note* only Assessors that are linked to the Curriculum Manager role will be visible. There is the ability to view all Assessors by pressing the submit tab with no filters set).**

Delivery Performance Report

Reports

By Assessor: Assessor Roles: Variance Logs:

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4. Press on the submit button and delivery performance report displays.

Show entries

Assessor	Role	Total Caseload	Total Active Caseload	Apps Caseload	PPED	Due to Complete in the Next 3 Mths	BIL	BIL to 30 Days	BIL 31
Susy Watson	Functional Skills	13	12	11	1	0	1	0	
Susy Watson	Primary Assessor	23	6	6	0	1	1	0	
Total:		36	18	17	1	1	2	0	

Showing 1 to 2 of 2 entries Previous 1 Next

5. From the reporting page, there is the ability to drill down on data that displays a line under the number.

Within the Deliver Performance Report the following information is available:

- ❖ Assessor Caseload
- ❖ Learners past their expected end date (PEED)
- ❖ Completions due within 3 months
- ❖ Break in Learning (BIL)
- ❖ Cancelled Sessions by roles
- ❖ No sessions booked
- ❖ Off the Job (OTJ)
- ❖ Health and Safety required
- ❖ Personal Liability required

Assessor	Role	Total Caseload	Total Active Caseload	Apps Caseload	PPED	Due to Complete in the Next 3 Mths	BIL	BIL to 30 Days
Marcus Topley	Functional Skills	2	2	2	0	0	0	0
Marcus Topley	Primary Assessor	2	2	2	0	0	0	0
Rob moger	Functional Skills	6	6	6	0	0	0	0
Rob moger	Primary Assessor	21	9	8	1	0	0	0
Susy Watson	Functional Skills	10	9	8	1	0	1	0
Susy Watson	Primary Assessor	13	4	4	0	0	1	0
Total:		54	32	30	2	0	2	0

BIL 31 to 60 Days	BIL 61 to 90 Days	BIL 91 plus Days	Cancelled	Cancelled by Assessor	Cancelled by Learner	
Cancelled by Employer	No Sessions in Last 45 Days	No Next Visit	Open Sessions	0% OTJ	1-24% OTJ	25-49% OTJ
50-74% OTJ	75-99% OTJ	100%+ OTJ	H & S Required	PL Required		

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6. Selecting to drill down on data will display further information on the Assessors caseload.

Assessor ▲	Role ▲	Total Caseload ⇅	Total Active Caseload ⇅	Apps Caseload ⇅	PPED ⇅	Due to Complete in the Next 3 Mths ⇅	BIL ⇅	BIL to 30 Days ⇅
Rob moger	Functional Skills	6	6	6	0	0	0	0

Total Caseload

First Name ⇅	Surname ⇅	Unit Name ⇅	Course Status ⇅	Course Start ⇅	Course End ⇅	Cancelled ⇅	Cancelled By Assessor ⇅
little	john	C&G Functional Skills English Level 1 50093198	In Training	13/02/2019	29/02/2020	0	0
little	john	C&G Functional Skills Maths Level 1 50109868	In Training	13/02/2019	29/02/2020	0	0
Nero	Ceaser	C&G Functional Skills English Level 1 50093198	In Training	05/03/2019	31/03/2020	1	1
Robin	Hood	C&G Functional Skills English Level 1 50093198	In Training	05/02/2019	29/02/2020	0	0
Robin	Hood	C&G Functional Skills Maths Level 1 50109868	In Training	05/02/2019	29/02/2020	0	0
test	iqa	C&G Functional Skills English Level 1 50093198	In Training	10/05/2019	21/05/2020	0	0

Submit
Reset
Export Assessor Level to Excel

Note* export facility only exports the drill level displaying

For more support on this please contact your account manager or email accountmanagers@SmartAssessor.co.uk