

Report Writer Manual

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1. Starting to use Report Writer

- ◆ Report Writer is a secure online reporting system which allows you to complete your reports from external moderation visits electronically. It's accessed like a webpage and the web address is <http://reportwriter.ncfe.org.uk>.
- ◆ Your log in details will be emailed to you by the External Quality Assurance (EQA) team.
- ◆ If you experience any problems when using the Report Writer website, a member of EQA will be happy to help. Please telephone them on 0191 239 8092 or via email eqa@ncfe.org.uk.
- ◆ Watch out for useful **TIPs** and **Notes** throughout the manual to help you navigate within software.

Logging in to Report Writer

- ◆ Enter your CP number (which can be found on your contractual documents) and password (as issued by EQA) and then click login.
- ◆ The log in screen looks like this:



- ◆ The home page looks like this:

Report Writer Logout

NCFE Report Writer

- You have 26 days remaining this period to submit your expenses to NCFE for processing
- You have 250 brand new visit reports waiting to be completed

I want to...

- Select a visit form & begin entering data**
Click here to enter data into your visit reports.
- Complete my products because I have finished all centre visits**
When all candidates have achieved a Full Certificate, you can close out the report from any further attention.
- View uploaded visit reports**
You can view, print and save previously uploaded reports in this area.

View allocations
You can view a summary of your allocated products in this area.

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3. Changing your Password

- ◆ Click on the third tab down on the home page - 'user options'. This is where you can change your Report Writer password, which we recommend you do soon after you receive your log in details.

I want to...

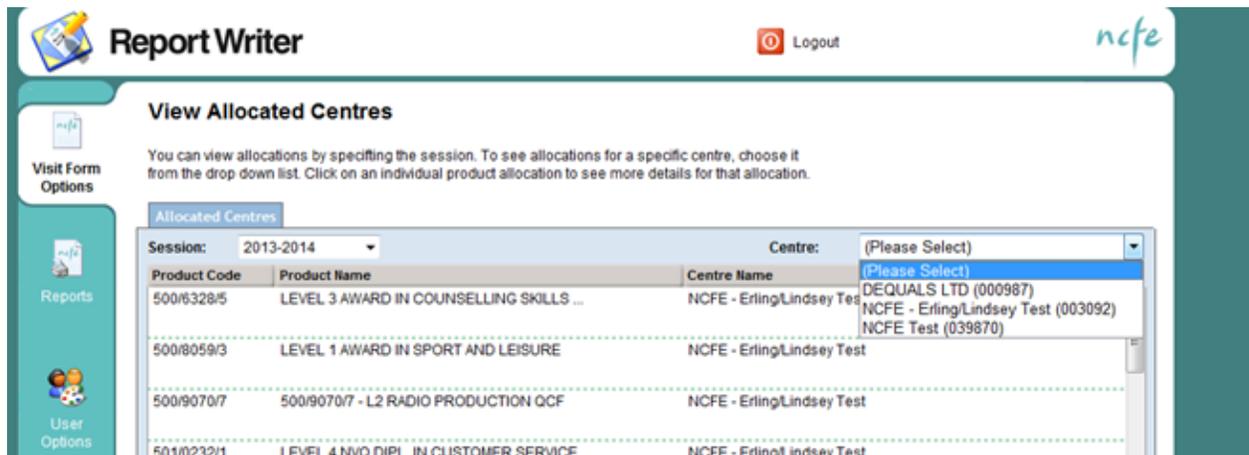
 Reports

 User Options

 **Change my NCFE Report Writer password**
Change your password to something more memorable.

4. View All Allocations

- ◆ On the first tab on the home page - 'visit form options', click on the option 'view allocations'. By selecting this you can view all of your allocations together on one screen. If you click onto a centre/qualification it will provide you with the centre's contact details which you'll need when you contact the centre to introduce yourself.



Report Writer Logout ncf

View Allocated Centres

You can view allocations by specifying the session. To see allocations for a specific centre, choose it from the drop down list. Click on an individual product allocation to see more details for that allocation.

Allocated Centres

Session: 2013-2014 Centre: (Please Select)

Product Code	Product Name	Centre Name
500/6328/5	LEVEL 3 AWARD IN COUNSELLING SKILLS ...	NCFE - Erling/Lindsey Test
500/8059/3	LEVEL 1 AWARD IN SPORT AND LEISURE	NCFE - Erling/Lindsey Test
500/9070/7	500/9070/7 - L2 RADIO PRODUCTION QCF	NCFE - Erling/Lindsey Test
501/0232/1	LEVEL 4 NVO DIPL. IN CUSTOMER SERVICE	NCFE - Erling/Lindsey Test

5. Planning your visit

- ◆ Once the Centre Support team has allocated you a centre, the details will appear on Report Writer the following day. Within **3 working days** of receiving the allocation, you'll need to get in touch with the Programme Contact to introduce yourself and to arrange a visit date that's convenient for you and the centre. Once the date has been agreed, you'll need to enter it into Report Writer within 24 hours of arranging the visit (see [Section 7](#)).

6. Finding allocated centres and qualifications

- ◆ On the home page, select the 'visit form options' tab and then click on 'select a visit form & begin entering data'.

- ◆ A new screen will appear with two tabs. These allow you to find the centre and qualification you wish to enter the planned visit date for.

New reports – lists centres that have registered candidates but not yet received any visits

Visited reports – lists all the centres that have received either a first, second or third visit that session.

TIP: You can sort the columns into alphabetical or numerical order by clicking on one of the fields at the top eg product number, product name, centre number etc. This is really useful when you have a number of allocations.

Please note: If the centre isn't showing, check the correct session is selected in the drop down box, and check under both new and visited reports. If you still can't find the

centre, it's probably because they haven't registered any candidates. Please contact the relevant Centre Support Assistant (CSA) to check.

7. Entering a Visit Date

- ◆ Once you find the centre/qualification, you'll notice that underneath the product code and name, it says '*Planned Visit Date: Not Set*'. This is because you haven't entered a date yet.

Select a Visit Form

Please use the form below to view and complete your centre visit reports.

Session: 2012-2013

Product Code	Product Name	Centre Name (003092)	Visit Level
600/3112/8/ODR	600/3112/8/ODR L3 NVQ Outdoor Program...	NCFE - Erling/Lindsey ... (003092)	1
501/1047/0	501/1047/0 Level 1 Getting on at Work	NCFE - Erling/Lindsey ... (003092)	1

- ◆ Click onto the relevant centre and qualification. This screen appears:

The screenshot shows the 'Report Writer' interface with a 'Visit Report' for '501/2318/X - L2 Dip in Health and Social Care (501/2318/X) NCFE - Erling/Lindsey Test (003092)'. The page has a sidebar with 'Visit Form Options', 'Reports', and 'User Options'. A list of buttons is visible: 'Update Planned Visit', 'Begin Visit Report', 'View Candidate List', 'View Visit Report', and 'Upload Visit Report'. A red-bordered box highlights error messages: 'Section 1: Visit date does not appear valid', 'Section 3: One or more required selections missing', 'Section 4: One or more required selections missing', 'Section 5: One or more required selections missing', 'Section 6: One or more required selections missing', and 'Section 7: One or more required selections missing'. A note at the bottom states: 'The report has already been started; you cannot change an active report to postal.' A 'Back' button is in the bottom right.

- ◆ Click on the 'update planned visit' button, which takes you to the page below, and enter the planned visit date and time.
- ◆ If there are any changes to the Programme Contact details or to let us know if you're visiting a satellite centre please fill in the 'Any additional notes' box.

The screenshot shows the 'Report Writer' interface with the 'Update Planned Visit' form. The sidebar is the same as in the previous screenshot. The form title is 'Visit Report' for the same product. It asks the user to 'Please enter the planned visit date and time:'. There is a 'Date' field with a calendar icon, showing '03/07/2013' (format dd/mm/YYYY). There is a 'Time' field with dropdown arrows, showing '14 00' (24 hour format HH:MM). Below these is a text area for 'Any additional notes:'. A note at the bottom states: 'The visit date and time you've entered above will be sent directly to the Programme Contacts and Centre Support Assistant [Claire Edna Appleby](#) as soon as you hit the 'Save Visit Date' button.' There are 'Cancel Visit Date' and 'Save Visit Date' buttons. A 'Back' button is in the bottom right.

- ◆ As soon as you click 'save visit date' an automatic notification is sent to the Programme Contact at the centre, confirming the visit date.
- ◆ This information will then appear under the centre/qualification eg 'Planned Visit Date: 03/07/2013'

Select a Visit Form

Please use the form below to view and complete your centre visit reports.

Session: 2012-2013

Product Code	Product Name	Centre Name	Visit Level
501/2318/X	501/2318/X - L2 Dip in Health and Soc...	NCFE - Erling/Lindsey ... (003092)	1
Planned Visit Date: 03/07/2013			
500/0988/2	LEVEL 2 ART AND DESIGN	NCFE - Erling/Lindsey ... (003092)	1
Planned Visit Date: 11/04/2013 has passed. Please check.			

8. Changing the Planned Visit Date

- ◆ If the planned visit date changes, or has to be cancelled, please update Report Writer straight away.
- ◆ To do this go into the 'select a visit form and begin entering data' screen and find the relevant centre/qualification. Click onto it and the next screen will appear. Select the first button 'update planned visit' and either change the date and click save, or click the 'cancel visit date' button. Either of these will send an automatic notification to the Centre Support Assistant and the centre's Programme Contact.

9. Choosing Samples of Candidates

- ◆ At least **3 weeks** before the agreed visit date, you should send the standard External Moderator Visit letter by post or email to the Programme Contact. This letter will confirm the visit date, outline the schedule for the visit, confirm the address of the site to be visited and list all of the candidates you'd like to sample. You can find the standard letter on the External Contractor website.
- ◆ To view all of the registered candidates on the qualification at the centre, go to the 'select a visit form and begin entering data' screen. Find the relevant centre/qualification and click onto it. This time you'll need to select 'view candidate list'.

Visit Report

501/2318/X - L2 Dip in Health and Social Care (501/2318/X)
NCFE - Erling/Lindsey Test (003092)

Update Planned Visit Cancel or update the planned visit for this product.

Begin Visit Report Begin entering data into your visit report.

View Candidate List Select candidates for moderation.

View Visit Report View and save PDF version of completed visit report prior to uploading

Upload Visit Report Report has been checked and fully completed (please complete all required sections first).

Section 1: Visit date does not appear valid

Section 3: One or more required selections missing

Section 4: One or more required selections missing

Section 5: One or more required selections missing

Section 6: One or more required selections missing

Section 7: One or more required selections missing

- ◆ A separate screen pops up showing registered candidates and their associated batches.

TIP: Report Writer will automatically recommend a sample size based on the number of registered candidates.

TIP: The screen will automatically default to only show you *'registered'* candidates.

External Moderator Report (QCF Only)



Select Candidates for Portfolio Moderation

Please click on the appropriate heading to sort into ascending/descending order

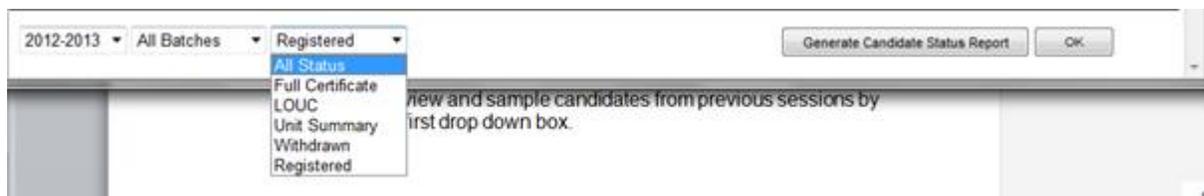
Find a specific candidate by name:

Batch	Session	Forename Surname	Gender	Status	Sample
804928802	2012-2013	HELEN CALTON	F	Registered	<input checked="" type="checkbox"/>
804961863	2012-2013	TEST CANDIDATE	M	Registered	<input checked="" type="checkbox"/>

3 Candidates in all batches, 2 in view. (Recommended sample: 3 candidates)

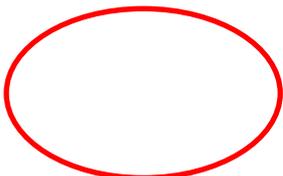
2012-2013 ▾ All Batches ▾ Registered ▾

TIP: You can change the third drop down box at the bottom of the screen, which defaults to registered, to show other statuses like withdrawn, fully certificated etc.



TIP: Remember to check the status to avoid asking for samples of work from candidates who've already been certificated.

TIP: You can also view and sample candidates from previous sessions by changing the first drop down box at the bottom of the screen.





TIP: To select candidates for sampling, click on the tick boxes under the sample heading on the right hand side so a tick appears, then click 'ok' at the bottom of the screen.

External Moderator Report (QCF Only)



Select Candidates for Portfolio Moderation

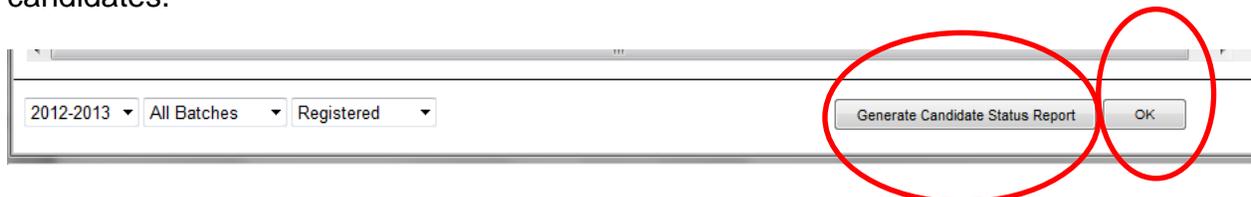
Please click on the appropriate heading to sort into ascending/descending order

Find a specific candidate by name:

Batch	Session	Forename Surname	Gender	Status	Sample
804928802	2012-2013	HELEN CALTON	F	Registered	<input checked="" type="checkbox"/>
804961863	2012-2013	TEST CANDIDATE	M	Registered	<input checked="" type="checkbox"/>

3 Candidates in all batches, 2 in view. (Recommended sample: 3 candidates)

TIP: If you want to print or email the sample, click on '*generate candidate status report*' first and then click 'ok'. This will produce a PDF version of the list of candidates.



TIP: If you're requesting photocopies of candidate portfolios for standardisation on your visit, the centre will need to complete the [Portfolio Release Agreement form](#). Either attach the form to your email or include it with the letter if you're posting it.

10. Filling out the Visit Report

- ◆ Go to the 'select a visit form and begin entering data' screen, find the relevant centre/qualification and click on it. You'll then be able to enter the visit report by selecting 'begin visit report'.

Visit Report

501/2318/X - L2 Dip in Health and Social Care (501/2318/X)
NCFE - Erling/Lindsey Test (003092)

Visit Form Options

- Update Planned Visit: Cancel or update the planned visit for this product.
- Begin Visit Report**: Begin entering data into your visit report.
- View Candidate List: Select candidates for moderation.
- View Visit Report: View and save PDF version of completed visit report prior to uploading.
- Upload Visit Report: Report has been checked and fully completed (please complete all required sections first).

Section 1: Visit date does not appear valid
Section 3: One or more required selections missing
Section 4: One or more required selections missing
Section 5: One or more required selections missing
Section 6: One or more required selections missing
Section 7: One or more required selections missing

- ◆ Here is how the first page of the report looks.

External Moderator Report (QCF Only)

Section 1: Centre Details

Qualification: 501/2318/X / 501/2318/X - L2 Dip in Health and Social Care
Centre: 003092 / NCFE - Erling/Lindsey Test

Main Centre Address
Test Citygate
St James Boulevard
NEWCASTLE UPON TYNE
Tyne and Wear
NE1 4JE

Head of Centre Contacts
Claire Appleby (jackjoyce@ncfe.org.uk) (0191 2398000)

Qualification Contacts
Claire Appleby (jackjoyce@ncfe.org.uk) (0191 2398031)

NCFE Contacts
Centre Support Asst: Claire Edna Appleby (clairednaappleby@ncfe.org.uk) (0191 239 8031)
Business Dev. Manager: Christine Paxton (christinepaxton@ncfe.org.uk) (07787419534)
Business Dev. Officer: Meredith Eastford (meredithastford@ncfe.org.uk) (07894 614 665)
External Verifier: Kay Chantler (kaychantler@ncfe.org.uk) (0191 239 8088)

Visit: 1 Visit Date: 03/07/1913 V2L:

Session: 2012-2013 Visit Duration: 3

Batches: 804928802 (1), 804961863 (2)

Section: 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12

Previous Next Save

- ◆ Continue through the form making sure you complete **all** sections.
- ◆ You'll notice that the final grading column 'N/A', is only available for certain questions throughout sections 3, 4, 5 and 6. This is to make sure that the 'not applicable' grade is only selected for questions which can't be graded eg physical resources, liaising with satellite centres, candidate attendance records etc.

- ◆ Once all of the details have been entered make sure you click 'save' before closing out. Alternatively you can save each page as you go along.

11. Expenses

- ◆ In Section 12 of the form - Expenses, you'll need to enter any costs incurred on this visit.
- ◆ Use the drop down menu button to confirm the type of expenses.

Please note: enter your expenses before you upload the report. Once the report has been uploaded you can't add or change anything. The expenses page won't appear on the version of the report that can be sent to the centre.

External Moderator Report (QCF Only)



Section 12: Expenses

Please ensure all uploads are smaller than 2MB in size.

Type	Value (£)	Proof (e.g. Scanned image of receipt)
[None] ▼		Browse...

Mileage
0

Section: 1|2|3|4|5|6|7|8|9|10|11|12

Previous Next Save

- ◆ Once all of the details have been entered make sure you click 'save' before closing out.

12. Claiming your expenses

- ◆ Claim your expenses for the visits you've carried out throughout the month. The cut-off date for expenses to be paid in that month is the 13th of the month.

Select Visits to Claim For

Please use the form below to claim expenses for your visits.

Unclaimed Visits Claimed Visits

Claim Expenses

Product Code	Product Name	Centre Name	Visit Level
501/1046/9	501/1046/9 Getting on at Work (Entry...	NCFE - Erling/Lindsey Test (003092)	1

- ◆ Go to the 'reports' tab and click the 'claim expenses' button. Another screen will appear showing all of the expenses that you've entered in section 12 of your reports. Click on 'process this claim'. A pop up screen will appear as a summary. If everything is correct, click the button at the bottom 'process this claim'. The screen will disappear.
- ◆ The claim (like the report) will automatically be sent to NCFE. You don't need to email or post us the claim or receipts.
- ◆ If you wish to view, print or save your claimed expenses or check the progress of your claims, select the second tab 'Claimed visits'.

Please note: Your fee per visit will be calculated automatically and added to your claim, once you've clicked 'process this claim'. You don't need to add these on separately.



Visit Form Options



Reports



User Options

Select Visits to Claim For

Please use the form below to claim expenses for your visits.

Unclaimed Visits

Claimed Visits

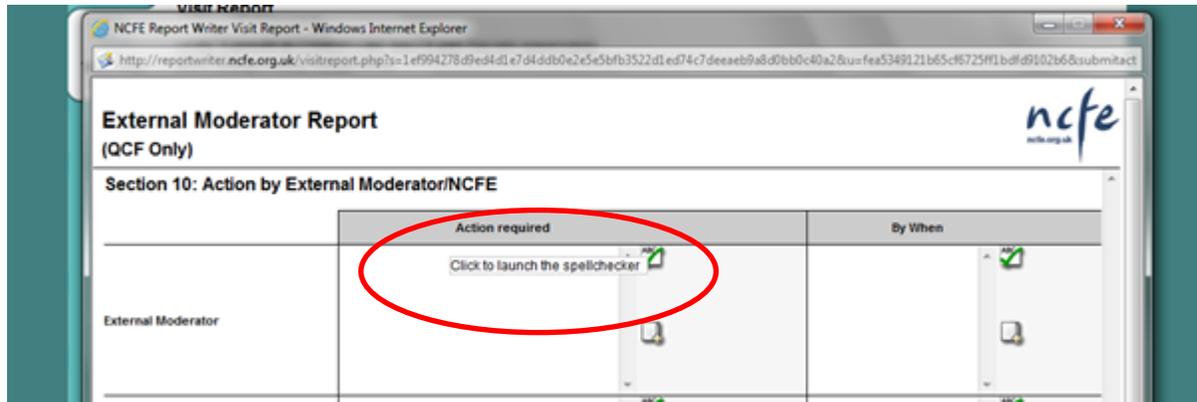
- 04/01/2011
- 27/05/2011
 - F/502/4284 - F/502/4284 Employability units entry ... (003092)
 - 500/5070/9 - NCFE LEVEL 2 EXTENDED CERTIFICATE IN ... (003092)
 - F/502/4284 - F/502/4284 Employability units entry ... (003092)
 - 500/8215/2 - NCFE LEVEL 1 AWARD IN SUSTAINABLE DEV... (003092)
 - F/502/4284 - F/502/4284 Employability units entry ... (003092)
- 25/10/2011

- ◆ Click on any of the visits to open, print or save your claim forms. You may wish to do this for your records.
- ◆ When you open the pdf version of your claim form the final column marked 'status' shows you the progress of your claim eg awaiting approval or paid and, if so, what date the expenses were paid on.

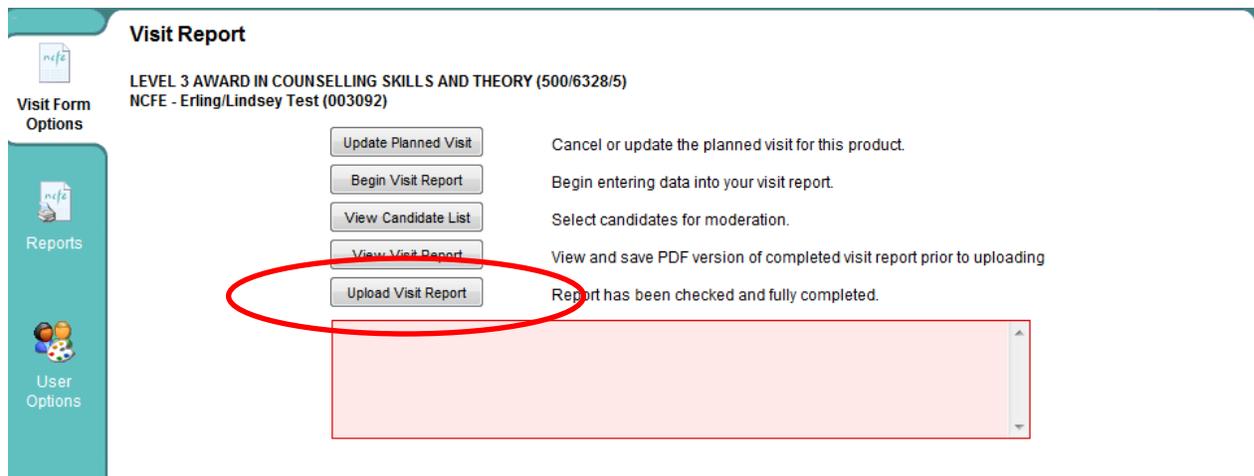
Qualification Number, Name & Session	Expenses Claimed	Expenses Approved	Fee	Status
HIGHER DIPLOMA IN BEAUTY THERAPY (C0740) (2004/2005 session)			£89.00	Waiting for Approval
152 miles claimed @ 0.40p/mile	£60.80	£-		
Breakfast	£5.00	-		
Hotel Bill	£90.00	-		

13. Uploading the report

Please note: Before uploading the report, please check your report again to make sure you're happy with the content and to check that there are no spelling or grammatical errors. You can use the spell check that's available for the narrative sections.



- ◆ Once saved click the 'x' in the top right corner to close out of the report.
- ◆ The *'upload visit report'* button will now be available on the screen. If the button is still unavailable, check the actions in the pink box. If you've missed any sections in the report they'll be listed here. Click on *'begin visit report'* and complete the missed sections.



- ◆ Click the *'upload visit report'* button.
- ◆ The report will then be automatically uploaded to NCFE.

14. Viewing uploaded reports

- ◆ Click on the 'visit form options' tab to return to the main screen.
- ◆ Select the 'view uploaded visit reports' option.

NCFE Report Writer

You have 16 days remaining this period to submit your expenses to NCFE for processing

You have 232 brand new visit reports waiting to be completed

I want to...

- Select a visit form & begin entering data
Click here to enter data into your visit reports.
- Complete my products because I have finished all centre visits
When all candidates have achieved a Full Certificate, you can close out the report from any further attention.
- View uploaded visit reports**
You can view, print and save previously uploaded reports in this area.
- View allocations
You can view a summary of your allocated products in this area.

- ◆ You'll see a list of all reports uploaded by you to NCFE. If the page is blank, try changing the session.

View Uploaded Reports

You can view reports you have uploaded by selecting them from the list below.

Uploaded Reports

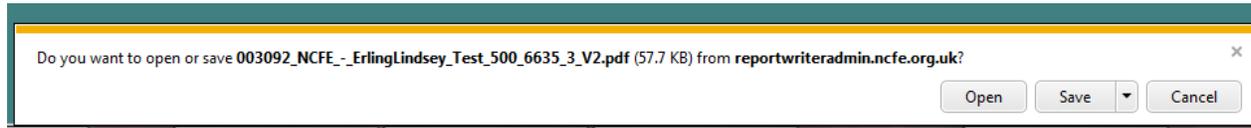
Session: 2012-2013 Centre: (Please Select)

Product Code	Product Name	Centre Name	Visit Level
500/4296/8	500/4296/8 L2 Prevention and Control...	NCFE - Erling/Lindsey Test	1
500/6635/3	500/6635/3 - Employability Entry Lev...	NCFE - Erling/Lindsey Test	2
500/6635/3	500/6635/3 - Employability Entry Lev...	NCFE - Erling/Lindsey Test	1
500/7997/9	NCFE LEVEL 1 AWARD IN EXERCISE STUDIES	NCFE - Erling/Lindsey Test	2

- ◆ You can also view the reports from a particular centre by selecting the centre from the drop down box in the top right corner.

Please note: You'll also be able to view any previous reports completed by another External Moderator if you've been re-allocated a centre from someone else. Report Writer gives you access to the last 2 visit reports to allow you to complete Section 2 of the report 'previous action plan' correctly.

- ◆ By double clicking on any of the reports you'll be presented with the options to save or print that particular report at the bottom of the screen. This will allow you to save the reports and email them to the centre and your Chief Moderator.

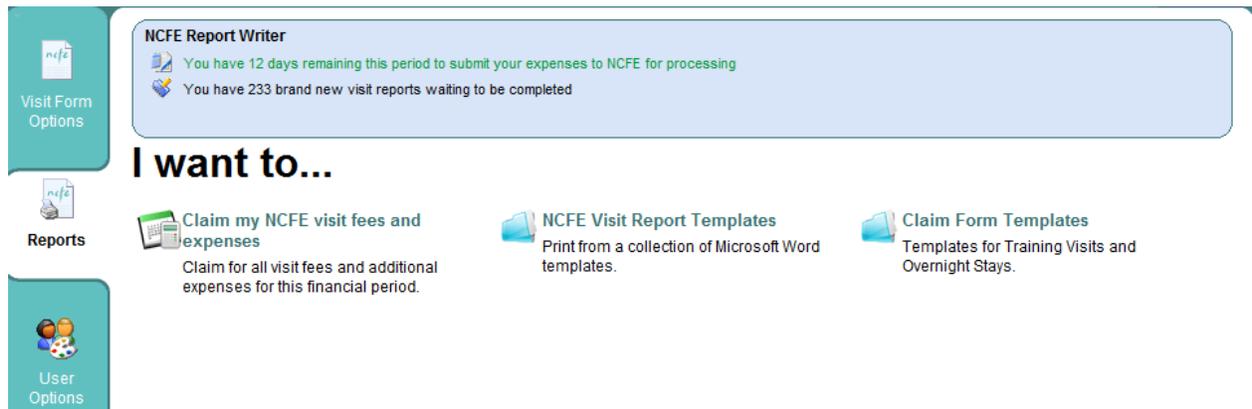


15. Reports

You can access a number of templates using the '*reports*' tab on the left hand side of the screen.

- ◆ '*NCFE visit report templates*' gives you access to blank moderation visit report forms. You might want to use a blank report to make notes on if you can't get access to the internet at the centre.

'*Claim form templates*' – there are various templates eg for overnight stays or training visits, which you can download and complete.



NCFE Report Writer

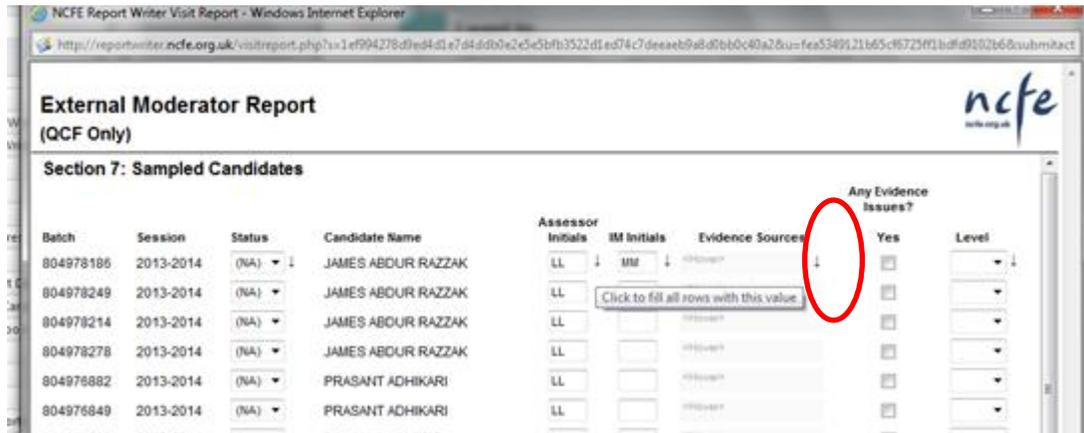
- You have 12 days remaining this period to submit your expenses to NCFE for processing
- You have 233 brand new visit reports waiting to be completed

I want to...

- Claim my NCFE visit fees and expenses**
Claim for all visit fees and additional expenses for this financial period.
- NCFE Visit Report Templates**
Print from a collection of Microsoft Word templates.
- Claim Form Templates**
Templates for Training Visits and Overnight Stays.

16. Other features of Report Writer

- ◆ In section 7 of the report you can apply the Internal Moderator (IM) initials, Assessors initials and level to all candidates by clicking the arrow next to the box. If they're all the same you don't need to enter them separately.



- ◆ In the blue box at the top of the Report Writer page, there are reminders to let you know the number of days you have left to claim your expenses and to show how many new allocations you have.

Your NCFE Report Writer was last used on



You have 21 days remaining this period to submit your expenses to NCFE for processing



You have 8 brand new visit reports waiting to be completed

17. Troubleshooting / FAQs

This section provides you with the answers to the most common problems. If you can't find what you're looking for, please contact the External Quality Assurance team on 0191 239 8092 or email eqa@ncfe.org.uk.

Postal Moderation

Postal moderation can be requested by the centre by completing and submitting the request form available on the NCFE website. The request will be reviewed and authorised by EQA.

You should indicate that the report is for postal moderation by ticking the box on the first page of the report before you click *Begin Report*. You must have received authorisation from EQA for this and once clicked as 'postal' this cannot be reversed.

Report Writer Logout

Visit Report

LEVEL 1 ANIMATION (601/0268/8)
NCFE - Erling/Lindsey Test (003092)

Cancel or update the planned visit for this product.

Begin entering data into your visit report.

Select candidates for moderation.

View and save PDF version of completed visit report prior to uploading

Report has been checked and fully completed (please complete all required sections first).

With consent from NCFE, you may change the report to a Postal Visit Report.

Section 1:No visit date, No visit duration
Section 2:One or more required selections missing
Section 3:One or more required selections missing
Section 4:One or more required selections missing
Section 5:One or more required selections missing
Section 6:One or more required selections missing

I confirm NCFE has granted me permission to change this report to Postal moderation.

Multiple sessions Report

If you're completing a moderation visit which covers multiple sessions for the same qualification, you only need to fill in the current session report, and use the sampling candidate section to indicate the different sessions.

I can't see a certain centre

Make sure you've chosen the correct session under both new and visited products using the drop down box.

I can't view any candidates

Make sure you've checked all of the different sessions, batches and candidate statuses by changing the drop down boxes at the bottom of the screen.

How do I de-select candidates?

Tick again on the ticks in the boxes to remove them.

I'm trying to upload my report, but it says in the pink box that there is information missing from section 7 and I don't know what's missing!

Check you've entered the 'level', 'status' and 'sources of evidence' for each candidate.

Every time I enter the duration the system doesn't save it

Just enter a number and not the word 'hours'.

The information keeps disappearing

Make sure you're clicking the save button before closing the screen.

I've uploaded the report but didn't enter the mileage

Unfortunately you can't enter or change data retrospectively. Please make sure for the future you're checking these details before you upload your report.

I've uploaded the report and then found an error in the text

Unfortunately you can't enter or change data retrospectively. Please make sure for the future you're checking these details before you upload your report.

I've completed a visit, but the centre isn't showing and I've checked the correct session under new and visited products

This is probably because no candidates have been registered, or you haven't been allocated to that centre and qualification. Please contact the relevant Centre Support Assistant for the centre to check before making any visit arrangements.

I can't log into Report Writer



Please check you are using the correct link, CP number and password. If you are, and are still unable to log into Report Writer please contact the External Quality Assurance team on 0191 239 8092.

I have some batch numbers missing?

Try changing the session.

How do I change my password?

Go to the '*user options*' tab on the left hand side and select '*Change my NCFE Report Writer password*'.

I can't find my second visit report to complete?

Check the visited products screen.

The information I typed into section 12 isn't saving

Make sure you haven't typed any additional information into that section, as incorrect data in certain fields might cause it to disappear.