

# Employer Guide- Completing and Signing Forms

**Queen Mary, University of London**

**Version: 1.0**

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## Signing forms via email link

The easiest way to sign a form is by clicking on the link you receive via email. You will receive an email from [noreply@smart-assessor.co.uk](mailto:noreply@smart-assessor.co.uk) with the subject 'Signature Required on Smart Assessor Form'. Click the link within to access the form to sign it.

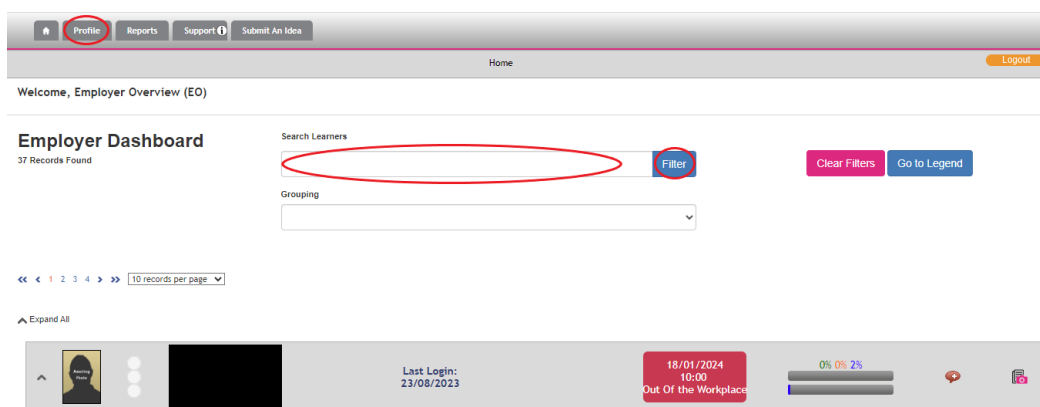
1. Click on the link within the email. If you are not already logged in, please login (using the instructions from the relevant 'How to login' guides). You will then be able to access the form.
2. Scroll down (you may have to click 'next' to navigate to the correct page) and click the checkbox next to 'employer' to "sign" the form. Once you have done this, click 'save' and then 'return without saving' to exit the form.

If the link within the email has expired (it lasts 72 hours), you can access the form via your dashboard as described below.

## Signing forms manually (via 'Learning Plan')

Remember, the easiest way to complete the forms allocated to you is always via the email sent from [noreply@smart-assessor.co.uk](mailto:noreply@smart-assessor.co.uk) informing you that you have an e-form that requires your signature. However, if this link has expired (each link will last only 72 hours), you will need to access these manually. The following steps will detail how to sign onboarding documents and tripartite review forms.

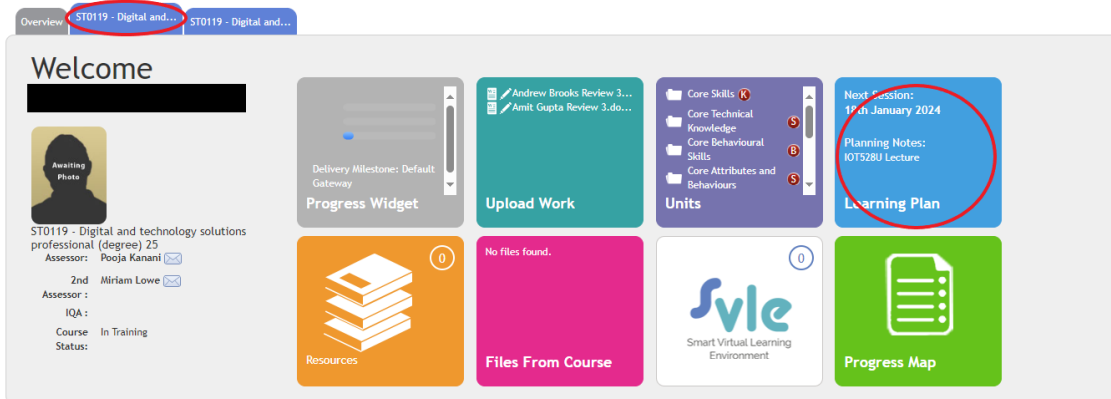
1. From the homepage, use the Search Learner bar to search for the learner and select filter to find the learner.



- On the left-hand side next to their photo, click the dropdown arrow and select the folder below 'portfolio' for the course related to your apprenticeship (there may only be one course) to be redirected to the learner's dashboard.

Portfolio On Track	Assessor	Course Name	Units	Progress Map	Last Session Date	Next Session Date	Last Session Status	Progress	Actions
		00305725-ST0119 - Digital and technology solutions professional (degree)	1   Core Attributes and Behaviours   Core Skills   Core Technical Knowledge   Specialism 1   Specialism 2   Specialism 3   Specialism 4   Specialism 5   Specialism 6			---	Not Attended	0% 0% 3% 19/12/2023 to 30/05/2026	
	Pooja Kanani Miriam Lowe	25-ST0119 - Digital and technology solutions professional (degree) 25	1   Core Attributes and Behaviours   Core Skills   Core Technical Knowledge   Core Behavioural Skills   Core Attributes and Behaviours   Specialism 1   Specialism 2   Specialism 3   Specialism 4   Specialism 5   Specialism 6		Dec 21 2023 11:00AM	18/01/2024 10:00 Out Of The Workplace	Attended	0% 0% 2% 19/12/2023 to 30/09/2026	

- From the learner's dashboard, click on the blue tab indicating their course and then click on 'Learning Plan' within the blue square to see a list of all the learner's sessions.



The dashboard shows a 'Welcome' message and a navigation menu. A blue tab for 'ST0119 - Digital and...' is selected. In the main area, a blue square labeled 'Learning Plan' is circled in red. Other widgets include 'Progress Widget', 'Upload Work', 'Resources', 'Files From Course', 'Syle Smart Virtual Learning Environment', and 'Progress Map'.

- Scroll down to navigate to the correct date and time of the review/induction session form you need to access. Click the chevron next to the Course Name, which will open up the resources for the session. From the list on the right-hand side, click on the red 'F' next to the word 'Review' for review forms or next the word 'General' for onboarding forms. This will open the relevant form.

Tip: If there are a large number of sessions listed, you can use the filter 'type' at the top, selecting 'formal review' from the dropdown menu for reviews or 'induction' for onboarding forms.

Session No	Date	Start	End	Type	Assessor	Attended	Learner Feedback
12	21/03/2024	11:00	12:00	Formal Review	Natalie Da Costa		

Who	Activity/Actions	Description	Files	Units	Target Date	Feedback	Duration	Status	Action
	Planning notes :								

1. ILP:  
2. Assessments:  
3. Review:   
4. General:   
5. Evidence:

- Once you have read the form and updated with any relevant comments, you can sign electronically by ticking the 'Employer' check box.

Signature  
 Employer Manager

- Smart Assessor forms do not automatically save changes so remember to click 'Save' at the top of the form to save your signature. Click 'Return (without saving)' when finished so that others can access the form.

You are viewing : Apprenticeship Learning and Progress Review- Test SSO

Review Completion Date Select from Other Completed Review Forms by Date

**Apprentice Details**

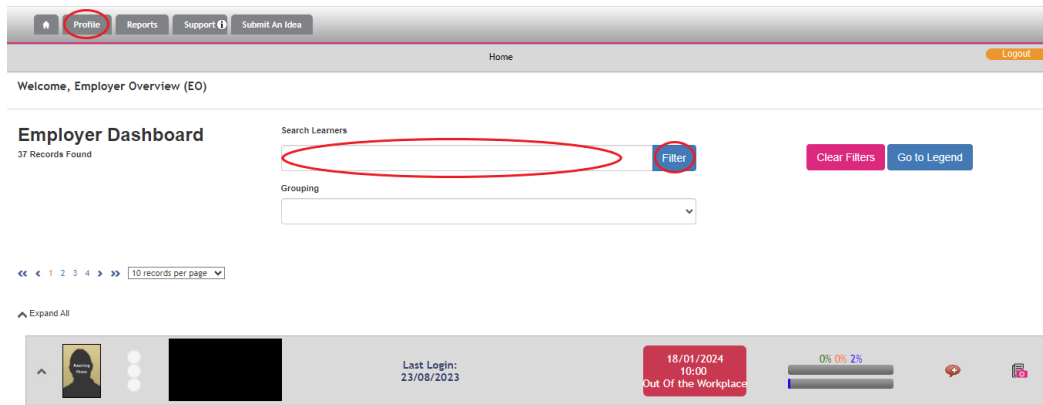
**N.B If you are unable to access a form as it says another user has the form open, please wait and try again half an hour later. A re-boot may also solve this issue. If the problem persists, please email your contact at QMUL to solve this issue.**

## Signing forms manually (via 'Files From Course')

Most forms are accessed via the Apprentices Learning Plan (as above). However, sometimes forms will be issued via 'Files from Course' and users will need to access forms there. For example, when an apprentice changes employer during their programme or returns from a Break in Learning.

Remember, the easiest way to complete the forms allocated to you is always via the email sent from noreply@smart-assessor.co.uk informing you that you have an e-form that requires your signature. However, if this link has expired (each link will last only 72 hours), you will need to follow the steps below to access the form.

1. From your homepage, use the Search Learner bar to search for the learner and select 'Filter' to find the learner.



Welcome, Employer Overview (EO)

**Employer Dashboard**  
37 Records Found

Search Learners  **Filter** Clear Filters Go to Legend

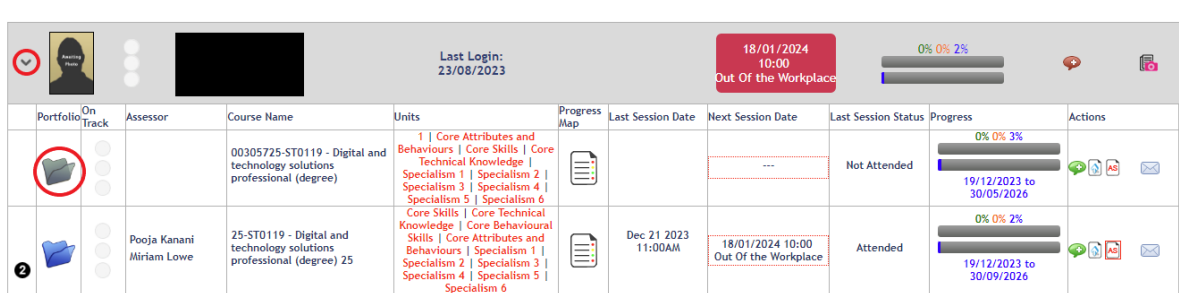
Grouping







<< 1 2 3 4 >> 10 records per page

Expand All

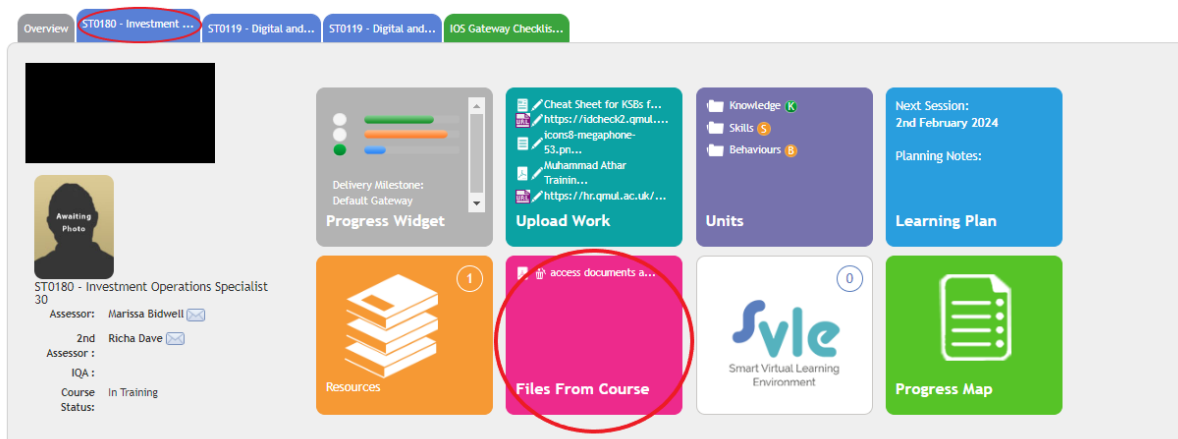
Last Login: 23/08/2023 18/01/2024 10:00 Out Of the Workplace 0% 0% 2%

2. On the relevant learner on the left-hand side next to their photo, click the dropdown arrow and select the folder below 'portfolio' for the course related to your apprenticeship (there may only be one course) to be redirected to the learner's dashboard.



Portfolio	On Track	Assessor	Course Name	Units	Progress Map	Last Session Date	Next Session Date	Last Session Status	Progress	Actions
	<input type="checkbox"/>		00305725-ST0119 - Digital and technology solutions professional (degree)	1   Core Attributes and Behaviours   Core Skills   Core Technical Knowledge   Specialism 1   Specialism 2   Specialism 3   Specialism 4   Specialism 5   Specialism 6			---	Not Attended	0% 0% 3% 19/12/2023 to 30/05/2026	
	<input type="checkbox"/>	Pooja Kanani Miriam Lowe	25-ST0119 - Digital and technology solutions professional (degree) 25	Core Skills   Core Technical Knowledge   Core Behavioural Skills   Core Attributes and Behaviours   Specialism 1   Specialism 2   Specialism 3   Specialism 4   Specialism 5   Specialism 6		Dec 21 2023 11:00AM	18/01/2024 10:00 Out Of the Workplace	Attended	0% 0% 2% 19/12/2023 to 30/09/2026	

3. From the learner's portfolio, click on 'Files From Course' within the pink square.



Overview **ST0180 - Investment Operations Specialist** ST0119 - Digital and... ST0119 - Digital and... IOS Gateway Checklis...

Delivery Milestone: Default Gateway **Progress Widget**

**Files From Course**

**Resources**

**Upload Work**

**Units**


**Learning Plan**

**Progress Map**

Next Session: 2nd February 2024  
Planning Notes:

ST0180 - Investment Operations Specialist  
30  
Assessor: Marissa Bidwell  
2nd Assessor: Richa Dave  
IQA:  
Course: In Training  
Status:

4. On the page that opens, click on the chevron next to the word 'Forms'.



Forms  Show/Hide Forms

5. The form(s) should appear in the Allocated Forms section.




Forms ▾ Show/Hide Forms




Allocate Forms:   Date Due:

Allocated Forms: From:  To:  Search:  Type:

Completed Forms: From:  To:  Search:  Type:

1

Form Name	Form Description	Type	Due Date	Actions
 Training Plan for Apprentice ABC		Review	24/01/2024	 

Form Name	Form Description	Type	Completed Date	Actions	Email
 Jan 24 Test for Onboarding		Review	24/01/2024	 	<input type="checkbox"/>

If the forms are not listed here, you will need to amend the date range 'From' and 'to' in the Allocated Forms section to include the date when the form would have originally been allocated to you (this does not have to be specific, so you can go back to a date that you know was before the date it was issued to guarantee it shows up). **Please do not use the 'Allocate Forms' dropdown or 'Allocate' button.**

6. Once you can see the form(s) allocated to you, click on the relevant form name and the form will open.




Forms ▾ Show/Hide Forms




Allocate Forms:   Date Due:

Allocated Forms: From:  To:  Search:  Type:

Completed Forms: From:  To:  Search:  Type:

1

Form Name	Form Description	Type	Due Date	Actions
 Training Plan for Apprentice ABC		Review	24/01/2024	 

Form Name	Form Description	Type	Completed Date	Actions	Email
 Jan 24 Test for Onboarding		Review	24/01/2024	 	<input type="checkbox"/>

7. Fill out the relevant sections of the form and then sign by clicking on the box.

**NB: If you need to come back to the form later to add any details, you can always click save (Smart Assessor does not automatically save changes). Please do not sign the form until you are happy that the form is complete from your perspective.**

Signature  
 Employer Manager

- Once signed, remember to click 'Save' at the top of the form to save your changes (these will not automatically save). Then, click 'Return (without saving)' when finished so that others can access the form.

You are viewing : Apprenticeship Learning and Progress Review- Test SSO

[Save](#) [Return \(without saving\)](#) [Export to PDF](#)

[Email to External](#) [Complete Form](#)

Review Completion Date  Select from Other Completed Review Forms by Date ▼

Review Date  Primary Assessor Name  MIS Learner ID

**Apprentice Details**

Learner Forename  Learner Surname

Course Name

Course Start Date  Course Expected End Date

Employer

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