



SkillsBackbone

2020

Annual Review  
User Manual

Contents

Document Status..... 1
1. Logging in..... 2
2. Overview..... 2
3. The Annual Review ..... 3
3.1. Completing the Annual Review [by 31 Jan]..... 3
3.2. Maintaining the Annual Review [post 31 Jan]..... 6
4. NSAR monitor of the Annual Review deadline [31 Jan]..... 6

Document Status

Table with 4 columns: Issue Status, Version, Updated, Published. Row 1: First Publication, 1.0, N/A, 14/01/2020

Important Note:

The screenshots contained within this user manual have been created using live provider information in order to make the manual as realistic as possible. Names of Assured Providers have been removed in order to maintain data privacy. Where Provider names have been removed, your own Provider name will display resulting in your view not showing as this user manual in every aspect of screen information.

This manual was created during system development and, therefore, may be slight variances in what is seen within this manual to what is displayed in the system. This manual will be updated to capture major updates to functionality only.

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LONDON, SW1H 9DJ

## 1. Logging in

Log In using the URL link and password which you have been issued. You will be taken to your landing page which is your Assured Provider Overview

## 2. Overview

Your log in will take you to your landing page which remains the Provider dashboard. The dashboard has been updated to show the 'Annual Review' and can be accessed from, both, the left-hand side of the screen and from the **VIEW** button on the banner showing that the Annual Review is due.

**NOTE: If the Annual Review has not been completed by 31 January, this blue bar will turn red and alert that it is overdue.**

The Annual Review is open all year from 1<sup>st</sup> February each year and should be **maintained** throughout the year to enable desktop reviews prior to an Assurance Visit being completed on the Assured Provider's current documentation.

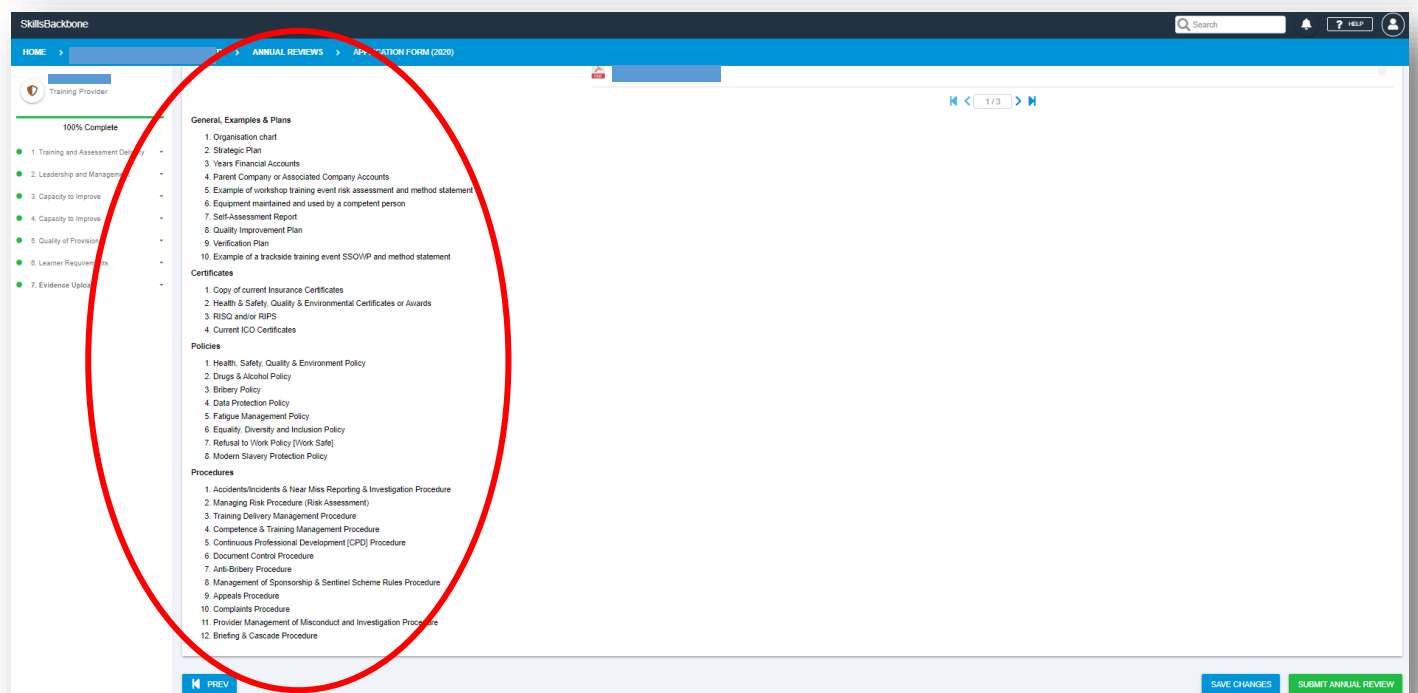
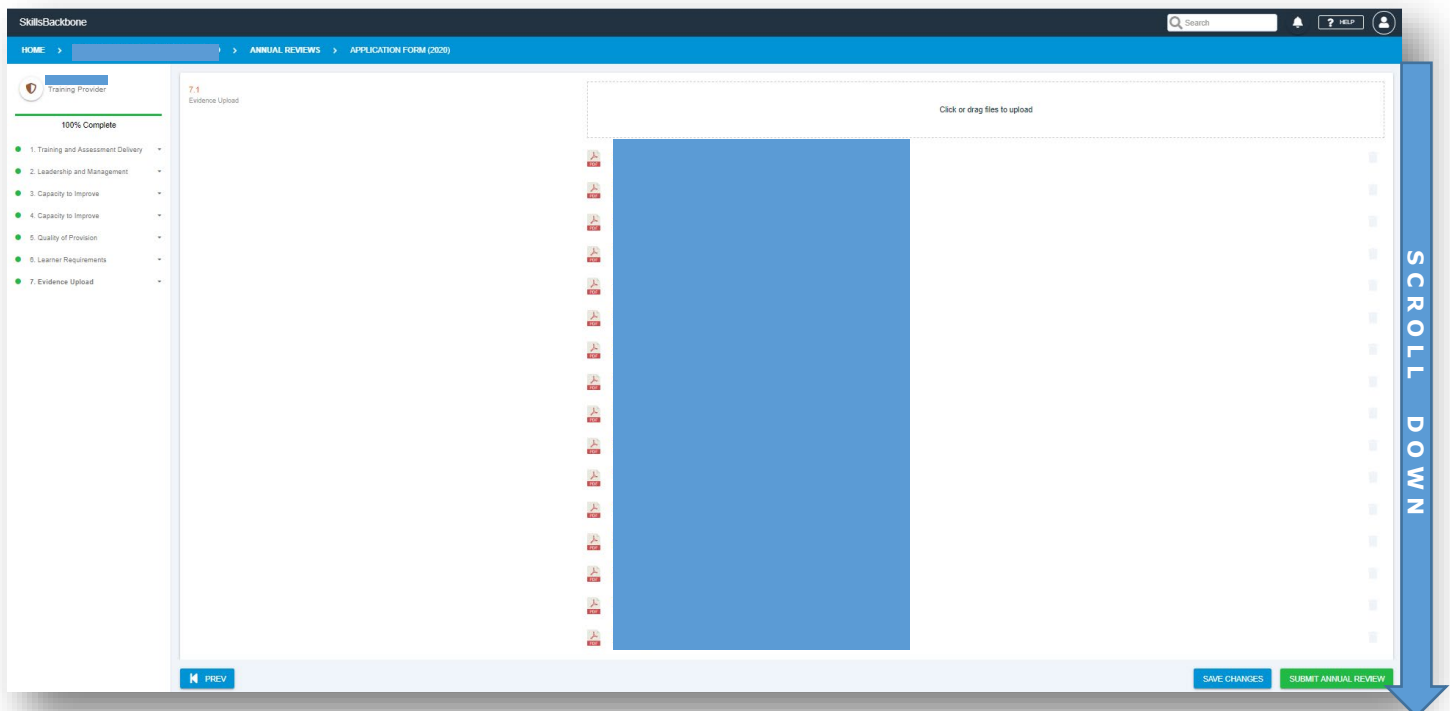
## 3. The Annual Review

### 3.1. Completing the Annual Review [by 31 Jan]

Click on, either, the **VIEW** button on the banner showing that the Annual Review is due or the 'Annual Review' on the left-hand side of the screen. This will take you to your list of documents which are uploaded to Skills Backbone.

**NOTE: Check if there are any changes to the documentation required by scrolling down from your current uploads to view the list.**

**THIS HAS BEEN UPDATED FOR THE 31 JANUARY 2020 SUBMISSION**



Review the documentation and **remove** old versions or documents no longer listed by using the grey dustbin icon. When complete then upload any current or new versions and/or documents **including the SAR and QIP**.

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ANNUAL REVIEWS > APPLICATION FORM (2020)

Training Provider

98% Complete

- 1. Training and Assessment Delivery
- 2. Leadership and Management
- 3. Capacity to Improve
- 4. Capacity to Improve
- 5. Quality of Provision
- 6. Learner Requirements
- 7. Evidence Upload

7.1 Evidence Upload

Click or drag files to upload

Remove outdated documents

PREV SAVE CHANGES SUBMIT ANNUAL REVIEW

When all documents have been refreshed to current documentation, click **SUBMIT ANNUAL REVIEW**.

SUBMIT ANNUAL REVIEW

The system will acknowledge that you have completed the Annual Review. To exit, click **VIEW ACCOUNT**

SkillsBackbone

ANNUAL REVIEWS > APPLICATION FORM (2020)

Training Provider

100% Complete

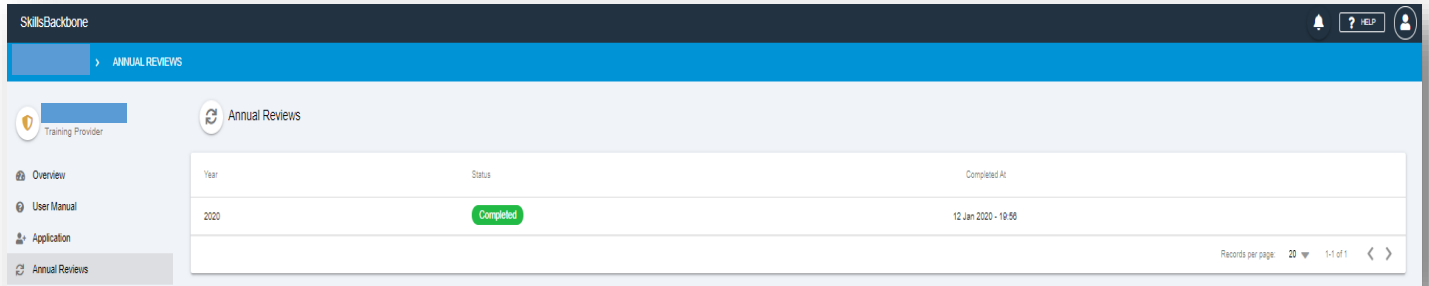
- 1. Training and Assessment Delivery
- 2. Leadership and Management
- 3. Capacity to Improve
- 4. Capacity to Improve
- 5. Quality of Provision
- 6. Learner Requirements
- 7. Evidence Upload

Finish and Submit

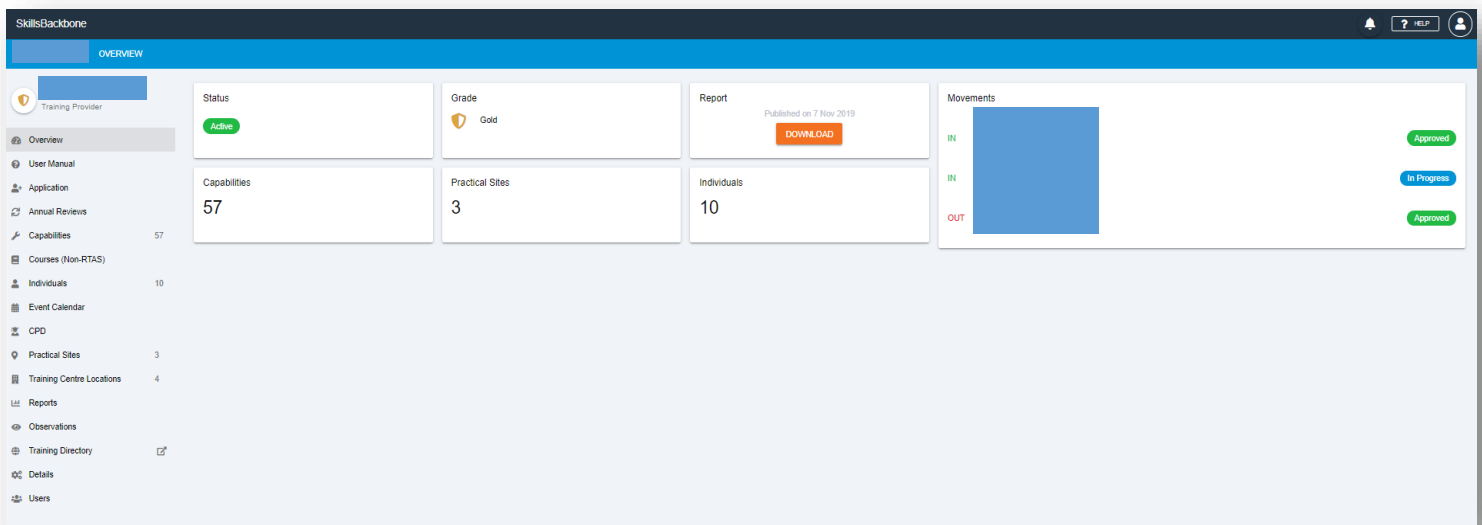
Thank you for completing your Annual Review.

VIEW ACCOUNT

This will then return you to the Annual Review page showing that it is **complete**.



Once the Annual Review has been submitted as complete the Overview dashboard will then **not** contain the blue bar stating that the Annual Review is due.



On the 1st February each year the completed Annual Review will become read only and cannot be edited

New Documents which apply to the Annual Review for the current year can be updated in the new Annual Review which opens on 1st February each year and is due to be completed before the next 31 January.

Any uncompleted Annual Reviews will show as **overdue** until completed.

### 3.2. Maintaining the Annual Review [post 31 Jan]

The new Annual Review will open on 1<sup>st</sup> February each year. When it opens it will copy the content of the last Annual Review completed and consequently will contain the current documentation that was submitted by 31 January.

As the Annual Review portal is open all year-round Assured Providers can upload their Interim SAR Statements and updated QIP's throughout the year as recommended by NSAR during 2019 Training Provider Workshops.

The open Annual Review is updated in the same way as above but by using the **SAVE CHANGES** button. The system will then confirm that the save has been completed



### 4. NSAR monitor of the Annual Review deadline [31 Jan]

NSAR access has a monitoring and reporting tool for the Annual Review to ensure that all Assured Providers upload their SAR, QIP and current documentation no later than 31 January every year as is required.

The Providers action to **SUBMIT ANNUAL REVIEW** by 31 January each year reports as 'Completed' to NSAR on the monitor dashboard below. The NSAR reporting tool records the date that the Annual Review has been completed

 A dashboard card titled 'Annual Reviews' with a refresh icon on the left and a yellow circle with the number '3' on the right. Below the title, there are three rows of data: 'Not Started' with a grey circle containing '104', 'In Progress', and 'Completed' with a yellow circle containing '3'.
 

Annual Reviews	3
Not Started	104
In Progress	
Completed	3

Providers who are not showing as 'Completed' on the NSAR dashboard and/or have missed the deadline of 31 January may be contacted directly by their Quality Assurance Manager or NSAR Quality Assurance Co-Ordinator to discuss.

The Quality Assurance Manager may also discuss it during Assurance Visits.