

DSA-MAP V2.6 functionality

DSA-MAP V2.6 has been designed to record and track the process of a DSA application. It alerts assessment centre users to outstanding actions on applications. Reports on monthly Key Performance Indicators (KPIs) and annual statistical returns are generated at the click of a button to meet the criteria set out in the QAF document (QAG, *Assessment Centre: Quality Assurance Framework*, Version 4.12, July 2014). The program also generates many of the statistics required for a self-assessment audit return.

This document lists the major features of the current (V2.6) software.

STUDENT DETAILS

Personal details

- Records personal, address and contact details for student applicant and a supporter (relative, advocate, etc)
- Records preference for communication via email or post
- Facility to send SMS messages to a student mobile directly from the program, e.g. reminder of imminent assessment appointment
- Records applicant disability from dropdown list (UCAS designated list of disabilities, with option to add other categories)
- Generates a unique automated reference number for each student. Students can also be assigned a separate assessment centre reference number
- Records person entering data and date of entry. (This date is generated by the program but is not used as part of the DSA application process)
- Searches for student records by name or part of name, student number, record number, postcode, or date of birth
- When the student record is saved, a folder is created (in a pre-designated network location) that contains a text profile of the student record
- A 'related document' feature means that any electronic document can be added to the student folder, e.g. assessment report, significant emails, etc. This feature supports maintaining a clear audit trail
- Check boxes record whether the applicant has given permission to contact the study institution or is willing for their application to be audited by QAG

Study details

- Records course details, including study institution, start date, end date, length of study and funding body from drop-down lists (additional institutions and funding bodies can be entered to the existing database). Funding body reference number can also be recorded
- Records part-time/full-time, graduate/postgraduate details, together with any 'top-ups'
- Can store multiple study records for each student (as with OU courses)

Appointment details

- Possible to pre-book assessments in blocks by assessor and then reserve and allocate them to individual student applicants. Useful for when assessors specialise in a disability or part-time assessors who only come into the assessment centre on certain days
- Pre-booked slots can be viewed for all assessors or individual assessors
- Program provides information on the number of days to an appointment and the last allowed appointment date (allowing 15 working days between request for appointment and actual appointment date)
- Records status of appointment (pending, complete, no show, cancellation)

- Displays warning alert where necessary permissions from funding body or institution have not been obtained
- An ability to email assessors with complete listing of appointments. A utility is provided, using one keystroke, to generate batch emailing of all assessors with details of weekly assessments. Automatic attachment of student profiles is optional (on or off)
- Resources (rooms, equipment, parking, etc) can be booked automatically in program diary when making appointments
- Appointments assigned to individual assessors
- Records assessment appointment request date from which QAF performance criteria are calculated
- Records whether student wishes to opt out from 'copy report' (default can be set in Options form)
- Records appointment venue and venue type (main centre, outreach centre, residential visit, etc) from drop-down list
- Records request from student for appointment to be outside timeframe with drop down list for reason
- Duration of assessment (hours/mins) can be recorded

PROCESS FORM

Letters/Email

- Can initiate email or letter communication directly from student record. DSA-MAP autofills contact details in standard templates (Word and Outlook) to produce, for example, appointment confirmation (date, time, venue, assessor, etc) or other standard communications to other interested parties (Assessor, Institution, Venue) in relation to the assessment appointment

Dates

Tracks all relevant dates for completion of each part of the assessment process. Program records date and who updated record

Pre-Appointment

- Enters DSA process start date from appointment details form
- Records confirmation of appointment letter/email
- Tick boxes for receipt and date of required student information and permissions (medical proof, funding body and pre-assessment form)
- Shows appointment date, time, venue and assessor
- Displays information on elapsed days for pre-appointment processes
- Records copy report opt-out/in option and duration of assessment

Report

- Allows user to log and date each part of the report process including draft report,

amendment requests, completion of corrections, QA sign-off, and the date of final report sent to student and FB

- In the case of requested amendments by the FB, there are similar dated action check boxes
- A next-deadline indicator gives warning of the next action required and its date
- Total days for the whole process form (student journey) are displayed
- Drop down lists for recording reasons for lateness (Centre-led, Environment led, and student reasons). Freeform text entry is also possible

Review

- Displays date of student reviews and their status, together with a rating
- Records sending and receipt of student evaluations
- Records logging of any complaint and its resolution

Other

Features for sending supplementary standard letters and emails, and producing invoices

Custom

- Allows the user to generate up to 10 different letters/emails from standard templates by simply pressing a button. Each button can be designated as either for an email or a letter
- Five further customisable, dated tick boxes available for centre use and can be renamed according to requirements

Finance

- Financial options to record fees and costs and related dates
- Ability to print out fees and costs in invoice form with appropriate address, with VAT levied at appropriate rate

DIARY

- Enables viewing of assessors' appointments
- Ability to create pre-booked time slots
- Enables viewing of pre-booked time slots
- Ability to Add/Edit staff record
- Pre-booked assessments can be made for each assessor and allocated as students phone in for appointments
- Appointments can optionally be registered in MS Outlook calendar as well as internal diary (on, off, or prompt)
- Records appointments for each assessor and student - links directly to student record
- Records appointments for each resource, e.g. equipment and rooms, including naming

and booking meeting rooms, parking, etc

- Assessors and resources can be colour coded for ease of viewing
- Assessor appointments (this week, next week, all future) can be emailed to an assessor together with student profile
- Individual days can be designated as holidays (such days are automatically discounted when calculating times allowed for a particular part of the QAF process for KPI purposes)
- Freeform entries can be made to book resources not related to a student application, e.g. room(s) and/or equipment for training and meetings
- Ability to print out diary for the designated week
- Can print out a day's assessment appointments, including student name, assessor and room for reception use

REPORTS

A variety of reports can be generated to provide management information and there is a specific KPI report which generates the information required for the monthly QAG KPI returns.

Disability report

- Shows number of students with a given disability assessed at individual venues within a chosen timeframe

KPI report

- Push-button report displays QAF-designated KPIs in graph format month by month for any selected year
- Selection of any month within the year displays statistics for KPIs to designated QAF criteria
- Right clicking on any KPI result in the table lists all student records that make up the entry figure. Double-clicking on any record takes the user directly to that student record. In other words, full traceability is maintained to original records

Summary

- Displays total number of assessments for month
- Shows total number of assessments by location
- Displays number of working days from first contact to Final Report (student journey) for students requesting a copy report and those that do not
- Displays length of student journey for 'copy report' and non-'copy report' students

Appointments

- Shows number of appointments given on first contact and withheld
- Displays number of appointments conducted within timeframe and outside, together with Centre led, Environment and Third Party led reasons

Copy reports

- Shows the number of Copy reports issued in and out of timescales and reasons for lateness according Centre, Environment and Third Party criteria
- Displays number of Final reports issued to students within and outside timescales

Finals

- Displays number of Final Reports to Funding Body for Copy Report and non-Copy Report students
- Shows number of final reports to Copy Report and non-Copy Report students, together with reasons for lateness

Output

- Prints KPI report in line with QAG KPI monthly return data headings with appropriate QAF (Jul 2014) paragraph numbers
- Prints analysis of monthly results showing status of each student application in progress during that month with milestones outside QAG timescales highlighted
- KPI numbers table can be exported and placed into an Excel chart to match the requirements of QAG's monthly return

Critical report

- Displays critical list of 'Due Soon', 'Due Today' and 'Overdue' process actions associated with all ongoing DSA applications. Separate tab lists for: Confirmation of Appointment, Appointment due, Assessment Appointment update due (post appointment date), Copy report to student due, Final to student due, Final to FB due, Student Review due. Double clicking on any item in a list opens the corresponding student record

Statistical report

- Push-button report to meet QAF annual statistical return on disabilities and number of students assessed by study mode and funding body

Review reports

- Displays lists of student reviews due and completed (first, second or all reviews) within chosen date parameters.

Customised reports

- Customised reports can be created by Resoco or the user to report on data held in the DSA database using industry standard Crystal™ Reports

TRACKING

- Facility to record items proposed in a student's Assessment Report which are challenged by Funding Body

DATABASES¹

Additions, deletions and edits can be made to any of the databases from within the program

- Funding Body database, with contact details and the ability to email or telephone dial directly from record
- University and college database (details of name, address, telephone number and website already included) with ability to add unlimited contacts for each record and possibility to email or dial the phone number directly from the record. Also records fee scales for various services
- QAG approved suppliers database with the possibility to email or dial the phone number directly from the record
- Venues database designed for assessment centres that operate across more than one site

NOTES

Notes associated with each part of the process are available for users to add personal or shared comments/reminders. All shared notes are dated with user ID for audit trail. Includes:

- Personal notes area
- Shared notes area
- Print option for both notes areas
- Notes for each student, study, and appointment record

REMINDERS

A utility that allows the user to set timed reminders of actions that need to be carried out. Produces a pop-up window when the action becomes due. Pop-ups can be reset to 'dismiss' or 'snooze'

PROGRAM MANAGEMENT

Options

The program contains many options for configuring how the program operates and displays information. Many defaults can be set, eg DOB field, time scales for student reviews, prompt before copying new appointments to Outlook calendar, etc

Security

- Login with password security (encrypted) for each database
- 10 levels of access security allowing great flexibility in allocation of rights
- Program lock which prevents access when user is away from desk

¹ Resoco makes no guarantee of the accuracy or completeness of its supplied databases for funding bodies or university / college institutions, or suppliers. The university and college database contains higher education and further education colleges that receive funding from HEFCE (March 2009). The institution details were checked against individual web sites (March 2009). The approved suppliers listing was taken from the QAG website (Autumn 2008).

Updates

- Automatic program updates from Resoco website (where allowed by customer IT department)
- Automatic updates from within program for database updates

PROGRAM CONFIGURATION

- Stand-alone licensing available
- Network client/server (per machine) licensing available
- Multiple copies can be run on each computer
- Each user can have a different profile (for different printers, for example)

EXPORT FOR MAILMERGE

- Exports to Excel for a chosen month student details (based on record creation date, appointment date or Sent Final report date) which can then be used in a mailmerge in Word or Outlook for evaluations, reviews or other forms. It can also help in pinpointing any discrepancies in KPI numbers which may well be due to data entry error