TITUS LEARNING

SMARTLY TAILORED E-LEARNING

COMPETENCIES & LEARNING PLANS IN MOODLE

How these can be used effectively to monitor performance

moodlepartner CERTIFIED SERVICES PROVIDER

What is a Competency Framework? **2**

What is a Learning Plan? **4**

Why use Learning Plans? 4

Understanding the Setup Process **6**

Creating a Scale **7**

Creating a Competency Framework **9**

Adding Competencies to a Framework 12

Editing Competencies 15

Creating a Learning Plan **18**

Adding competencies to a Learning Plan 20

Linking a learning plan manually 22

Linking a learning plan by user cohort 23

Creating a Competency Reviewer Role **24**

Assigning a Competency Reviewer role 26

What can a Competency Reviewer see? 28

Linking Competencies to a Course **29**

Linking Course Competencies to Activities **33**

Rating Competencies **34**

Rating from a course - Competency Breakdown Report 34

Rating from the Learning Plans Block 37

Completing a Learning Plan **39**

Reports **40**

Course Competency Breakdown 41

Customising Scale Colours 43

Monitor Learning Plans 44

Filter by learning plan template 44

Filter by user 45

Learning Plan Details 46

Learning Plan Statistics 49

Learner Views **50**

Course Competencies 51

Learning Plans 51

Monitor Learning Plans 53

What is a Competency Framework?

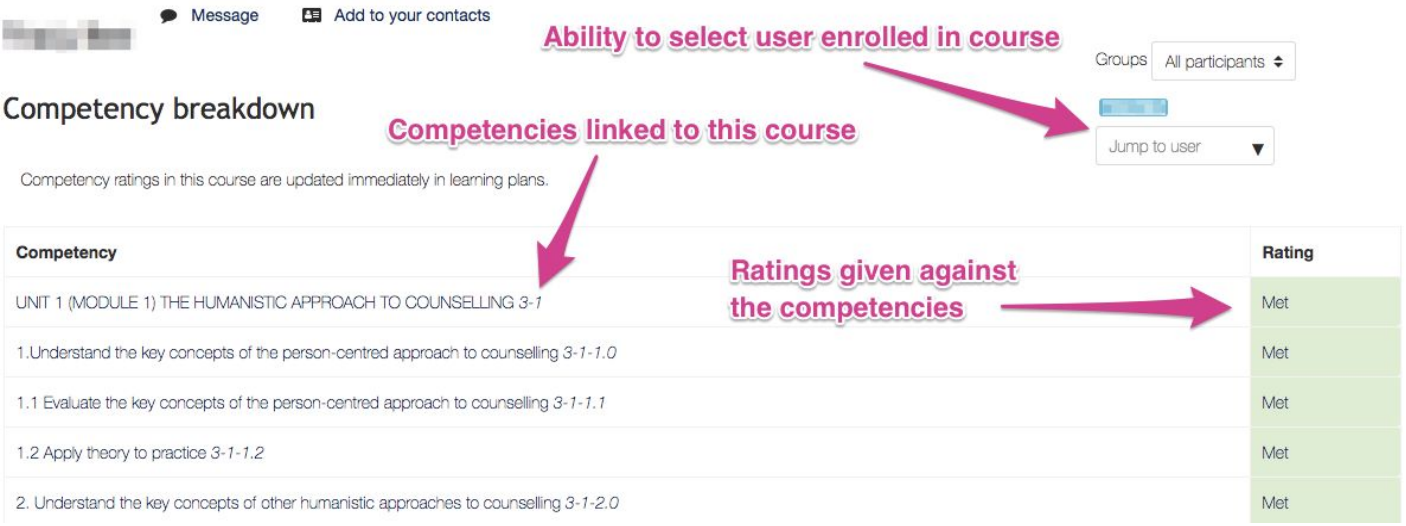
Within Moodle, a competency describes the level of understanding or proficiency of a learner in a certain subject related skill. A competency framework is an organised collection of competencies.

Competencies can be used for a multitude of purposes. For example an organisation may wish to implement competencies in order to describe a staff member's progress for their CPD (continual professional development).

Quick examples include:

- Teamwork
- Problem Solving
- Communication
- Professionalism & Integrity

Competencies are a great way of assessing people by being able to clarify if they can perform a specific task, or understand a specific objective. Numerical grades don't always provide enough meaningful data or properly document how well a person is achieving something. Within workplace learning this can be a particularly powerful tool.



Creating a list of competencies is only the first step. To rate learners against these competencies you need to create a scale. A scale allows you to evaluate/rate a learner's performance and can be simple or complex depending on requirements. Within a scale you must mark the point at which a user is classed as proficient in that skill if that status is reached. For example (colours used for emphasis):

	Example 1	Example 2	Example 3
Competency:	The learner can explain the state of hypnosis.	Monitor pupils' progress through observation, marking, targeted questioning and discussion.	Ability to conduct presentations to external clients, regulators & policy makers.
Scale:	• Not met • Met *(proficient)*	• Not on track • On Track *(proficient)* • Got it	• Cannot perform • Can perform with supervision • Can perform with limited supervision • Can perform without supervision *(proficient)* • Can teach others

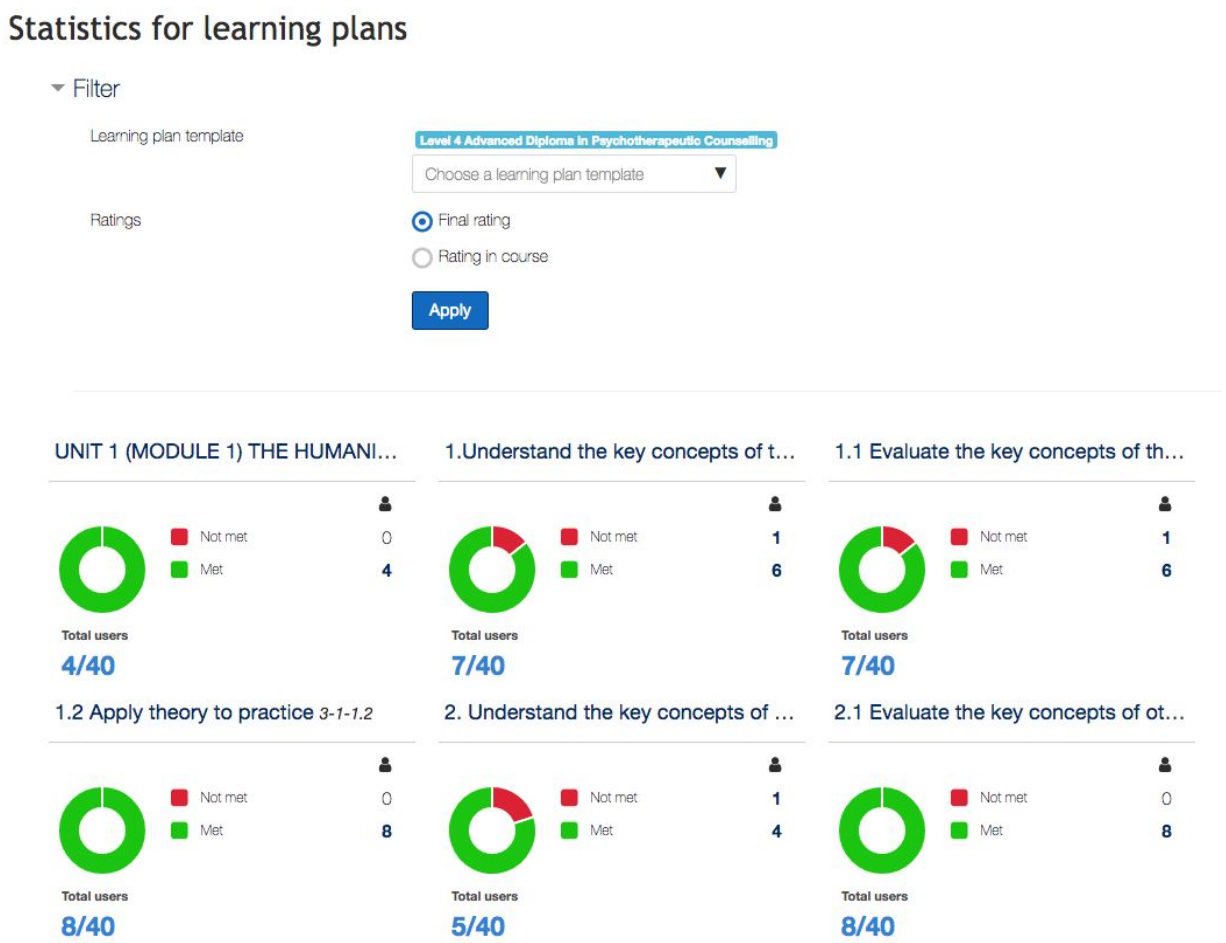
Through the use of competency frameworks and attached scales, course creators can gain more of an insight into where learners are struggling and consequently how they can help learners understand areas of difficulty. Learners will also have the ability to see how their understanding is being rated against key competencies.

What is a Learning Plan?

A learning plan defines a set of competencies which you can assign to an individual or group of learners. Learning plans can be particularly useful if there are a selection of competencies over multiple frameworks that you wish you assess in one location as opposed to over several courses.

Why use Learning Plans?

Another reason to use Learning Plans is the availability of third party plugins that can be utilised to display even more meaningful data at a higher level. An example screenshot can be found below.



In this example screenshot you can see the final rating for all learners that have been linked to this particular learning plan template. At a glance you can easily identify key learning objectives (competencies) with which users are struggling. As a tutor you can act

accordingly, for example developing the teaching and learning resources for that area of study.

Meaningful data can still be presented and utilised from within a course without using learning plans. For example a competency framework can be linked to a course, then relevant activities in the course can be linked to specific competencies. These competencies can then be rated within the course by the appropriate tutors and this data (competencies and their provided ratings) can be viewed on a per learner basis.

It's important to understand the differences between using competencies within a course and taking the extra step of using learning plans. You may wish to implement competencies and use a framework as a learning plan template. This means that your learning plans will be exactly the same as the competency framework (contain the same competencies) but you will have an extra level of reports at a site level, through the use of a third party plugin.

Understanding the Setup Process

Depending on your end goals there are slightly different approaches to take when setting up your competencies. The method outlined below on the left is assuming you want to implement competency frameworks & utilise learning plans alongside these. This allows for the course level competencies to provide useful information to tutors using the Competency Breakdown report and also at a site level for administrators to view advanced learning plan reports (both examples shown in previous sections).

I wish to implement competencies & learning plans	I wish to implement competencies
1. Creating a **Scale** 2. Creating a **Competency Framework** 3. Creating & linking a **Learning Plan** to users 4. *Creating a **Competency Reviewer** role to view awaiting reviews on the dashboard *(optional)* 5. **Linking Competencies to a Course** 6. **Linking Course Competencies to Activities**	1. Creating a **Scale** 2. Creating a **Competency Framework** 3. **Linking Competencies to a Course** 4. **Linking Course Competencies to Activities**

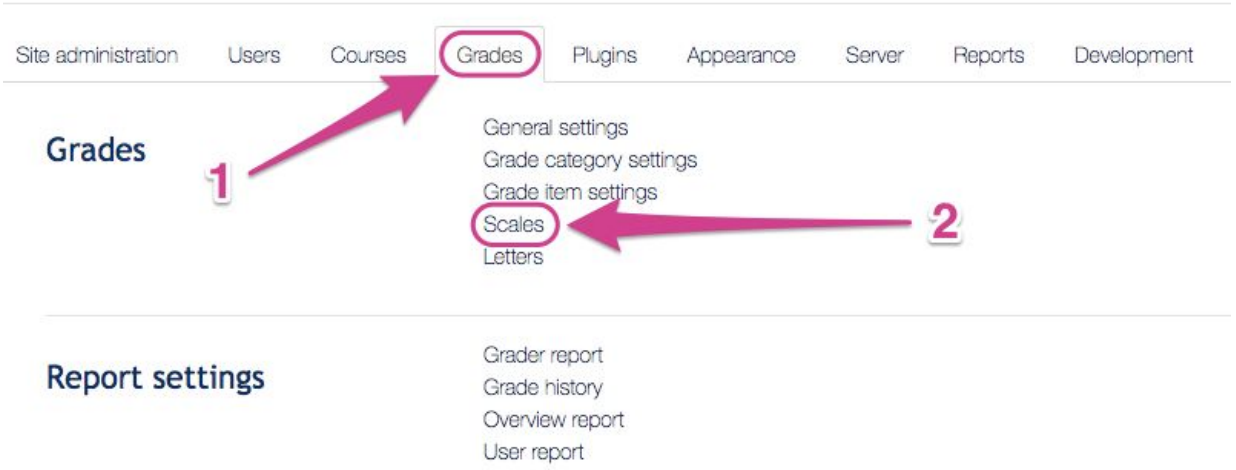
These steps above on the left are detailed in the following guide along with how to rate competencies and view the reports containing this information.

Note: Competencies reviewed using the learning plans block will not be reflected within a course when viewing the Competency Breakdown report.

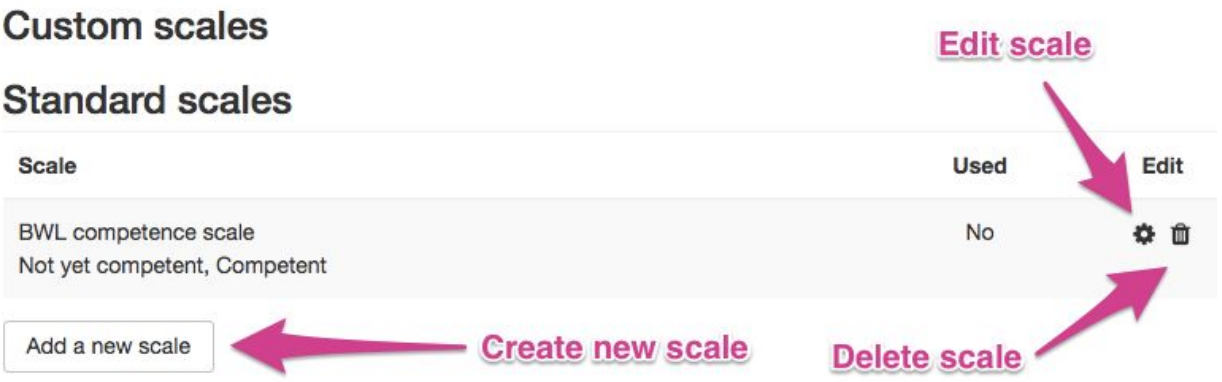
Creating a Scale

A scale allows you to evaluate/rate a learners performance and can be simple or more complex depending on requirements. Within a scale you must mark the point at which a user is classed as proficient in that skill if that status is reached.

To create a scale visit **Site Admin > Grades > Scales**.



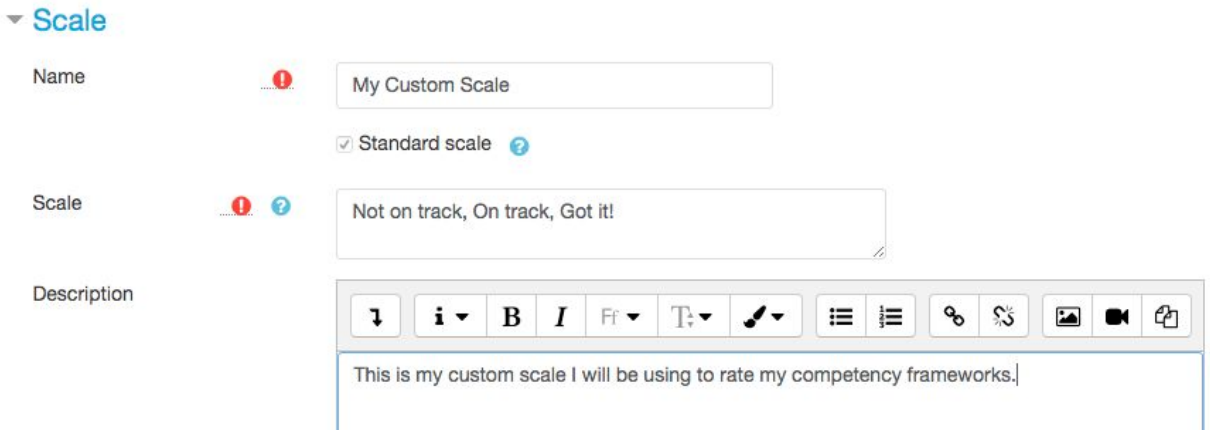
Within this menu you can **view** existing scales, **edit** or **delete** these or **create new** scales.



After clicking "**Add a new scale**" you can add a name for your scale as well as defining the constituent levels, separated by commas. For example in the screenshot below there are 3 levels.

- Not on track
- On track
- Got it!

You are also able to provide a description to help you identify the purpose of the scale.



It is important to note that once a scale has been used you are unable to edit the scale itself. It's therefore important to ensure the competencies and scales are correct to begin with.

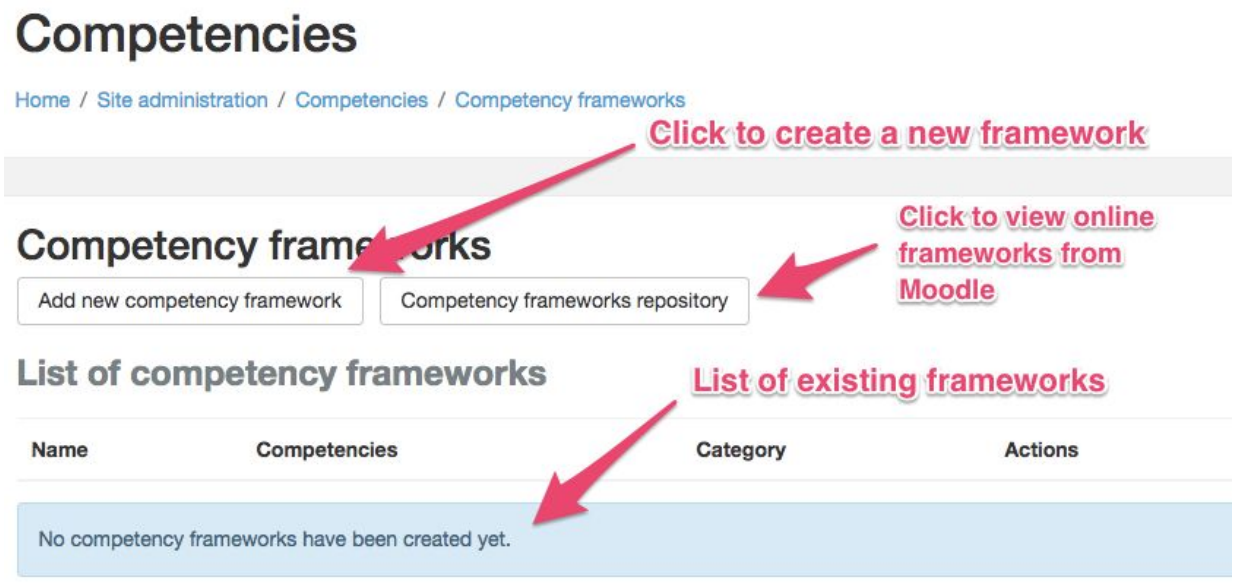
Creating a Competency Framework

As previously mentioned, competencies describe the level of understanding or proficiency of a learner in certain subject related skills. A competency framework is an organised collection of competencies.

Before you create a competency framework you must first check that competencies have been enabled. Navigate to **Site Admin > Competencies > Competency settings**.
Ensure that "**Enable competencies**" is set to Yes and also that "**Push course ratings to individual learning plans**" is enabled.
Having this setting checked is important as it means when a competency is rated in a course it will also be set in a users individual learning plan.

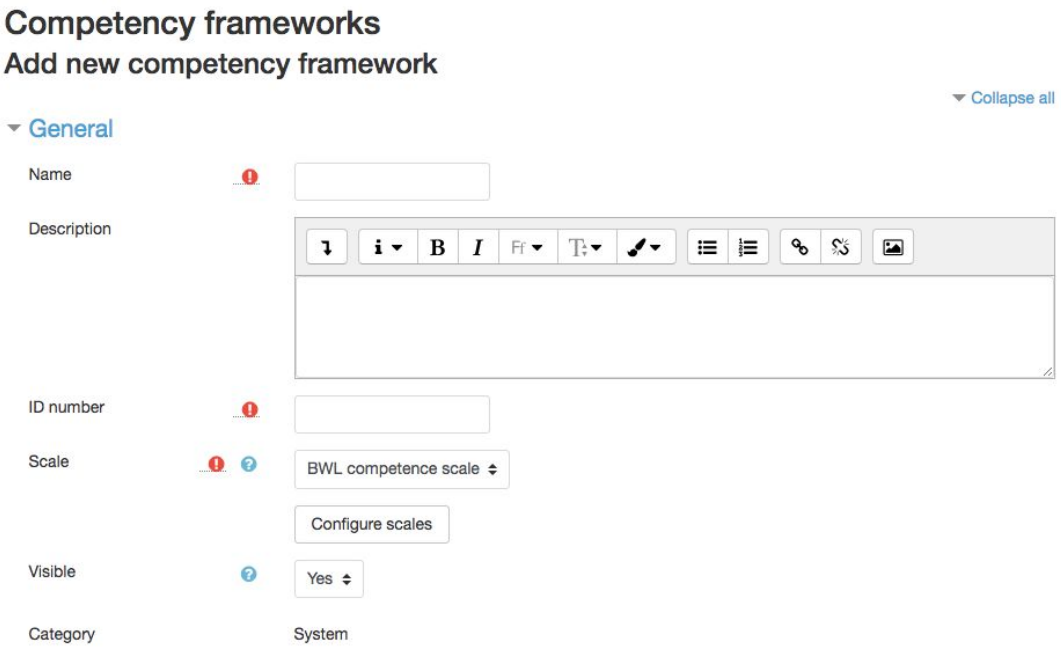
To create a competency framework visit **Site Admin > Competencies > Competency frameworks**. There is an option to import a competency framework via a CSV file, however we recommend entering these manually into the platform.

When viewing frameworks you have the ability to create new frameworks or select a framework to import from a competency frameworks repository.



To create a new framework click the "**Add new competency framework**" button.

You can now enter key information about the framework such as the name, description, ID number and scale.

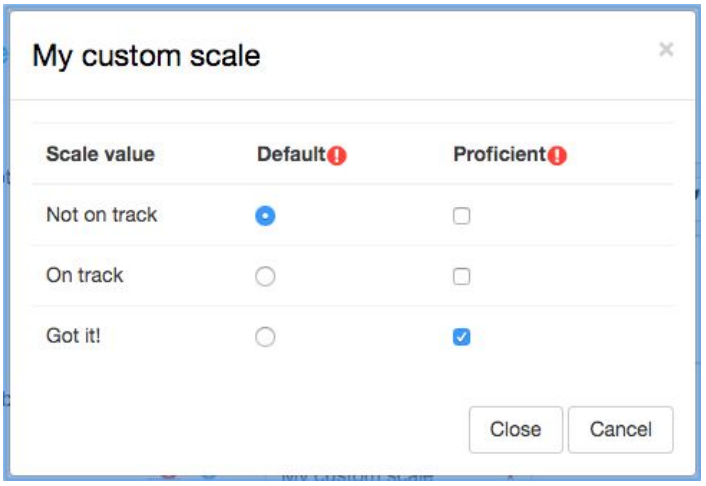


- **Name** - The name of the framework that will be shown in the frameworks list.

- **Description** - Some information about the contents of the framework and what the competencies/learning objectives are about.

- **ID number** - A unique identifier for the framework. This can contain numbers, letters and symbols. The importance of ID's will be covered in the following information when adding competencies to the framework.

- **Scale** - Select the scale that will be used against this framework. After selecting an available scale from the dropdown list you will then need to click "**Configure scales**".

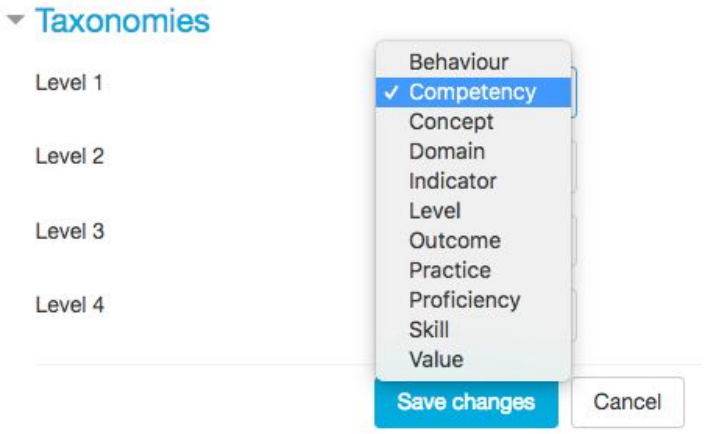


This screen shows the different ratings available within the selected scale. Here you must mark one of these values as the default value of the scale against competencies within this framework. Then select at which point a user will be proficient at a competency. The goal for users in most cases is to reach a rating where they are classed as proficient in each competency. You could introduce additional ratings after this point to represent an extension of knowledge or even the ability to teach others this knowledge.

Please note that you must get this step in the creation process correct/as desired. Once this has been set and users have had competencies rated this setting cannot be changed!

- **Visible** - This can be set to Yes or No. You may wish to set this to no whilst you built or update a framework so it is hidden from use.

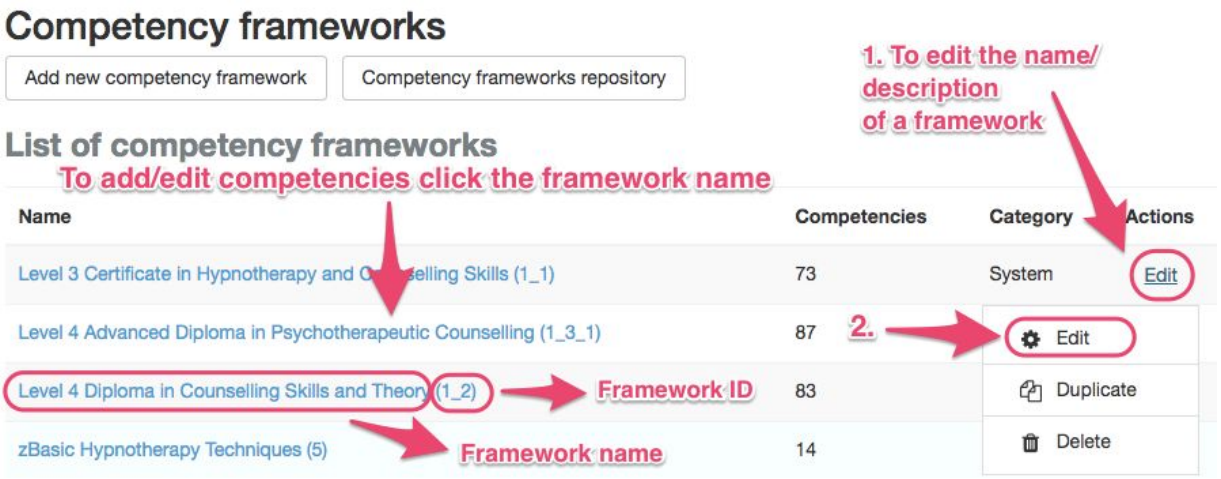
Below this section is the ability for you to change the terminology used to describe the competencies in your framework at these different levels. The levels refer to where competencies sit within your competency framework tree. By default these are all set to competency but you have the option to change the language here if required.



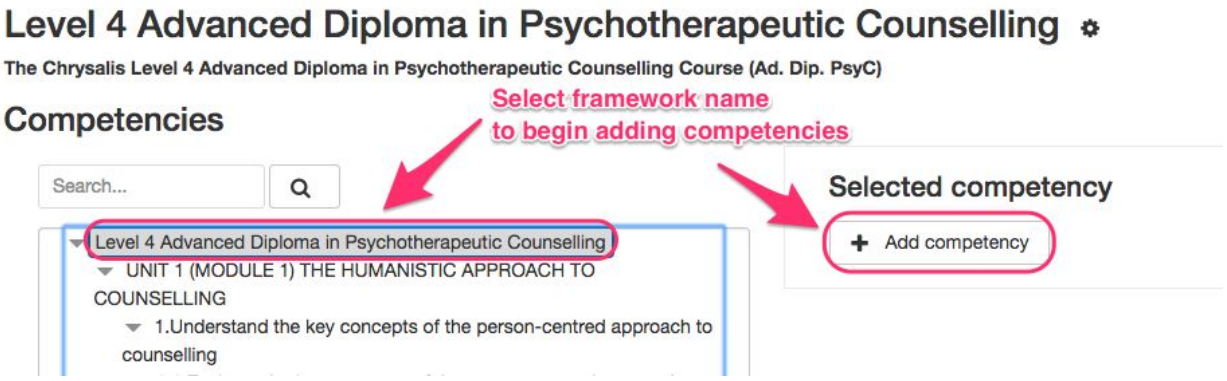
When you are happy with your changes clicking the blue ***Save changes*** button will save and create your new empty framework, and take you back to the list of frameworks on your platform.

Adding Competencies to a Framework

In the following example there are competencies already present in the frameworks. If you are not already here, navigate to **Site Admin > Competencies > Competency frameworks**. If you wish to make any name changes or alter any settings you entered during the creation process for the framework, click the **Edit** button beside each framework in the **Actions** column then from the dropdown click **Edit**.

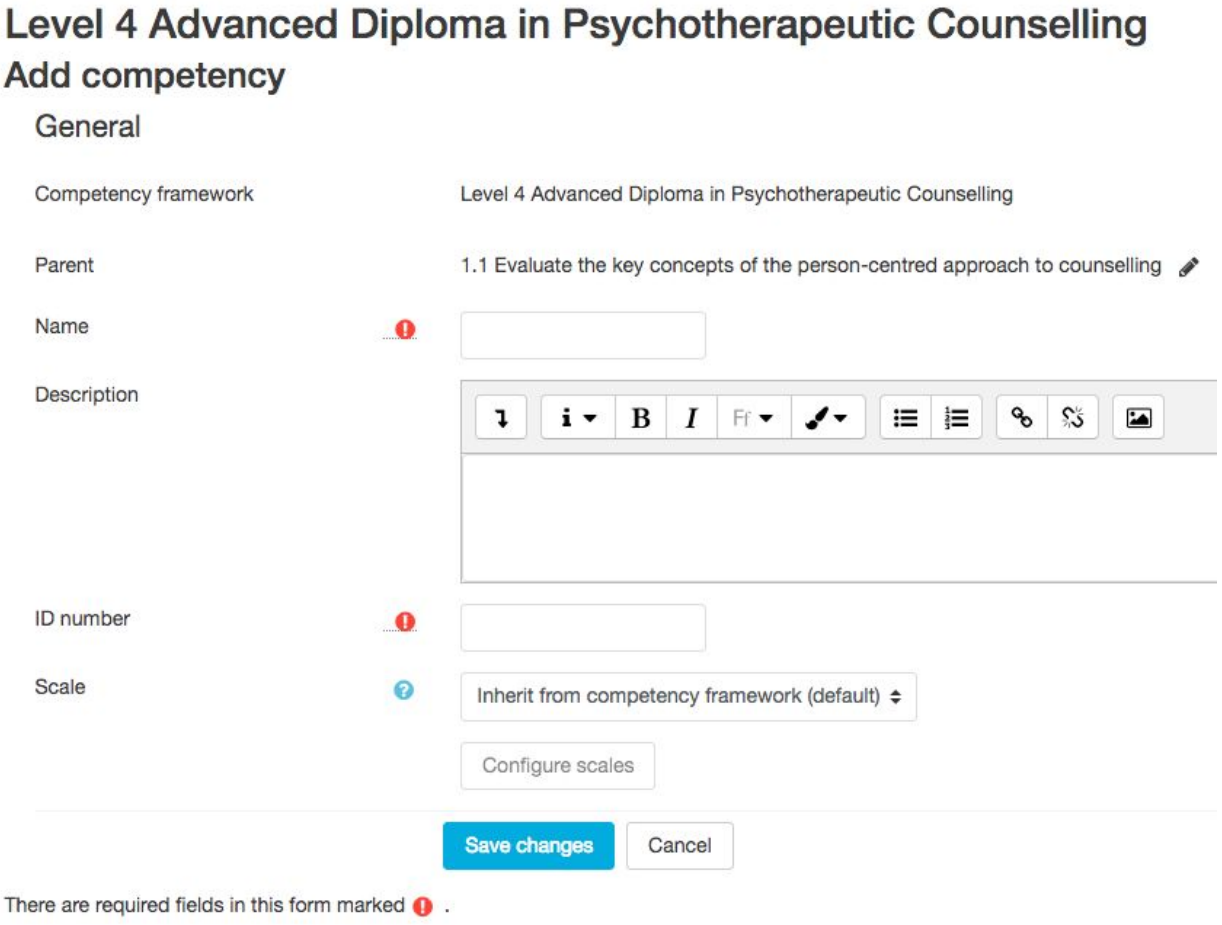


In order to add or edit individual competencies in this framework click on the name of the competency framework. For new frameworks you will only see the name of the framework in the competencies area on the left hand side. To add competencies to a framework you must select the framework name on the left and click the **Add competency** button on the right hand panel.



As you start adding competencies you can create them at different levels by having parent and child competencies. To do this select a competency then by adding a new competency on the right hand panel the new one will sit below the selected one as a child competency.

When you click **Add competency** you will be taken to the following screen where you must provide key information for each competency.



It will automatically list the framework you are in alongside the parent competency that this new competency will sit within. You are able to click the pencil icon to choose a new parent competency from the list that appears if you want to change this.

When providing the name of the competency it is important to note that there is a character limit of 100. It is advisable to include a number/letter to identify which unit/module (if applicable) you are viewing competency for. You may wish to include the entire description of the competency as the name itself but this will depend on how long the competencies are.

One example could be to include the full names (limited to 100 characters) as the name field and description field. A 3 tiered example (parent and child competencies) can be found below.

- UNIT 1 - THE HUMANISTIC APPROACH TO COUNSELLING
    - 1.Understand the key concepts of the person-centred approach to counselling

        - 1.1 Evaluate the key concepts of the person-centred approach to counselling
        - 1.2 Apply theory to practice

Another example (particularly if you have long competency names/descriptions) could be to use a similar approach for the names, as the descriptions themselves will hold the full competency descriptions.

- UNIT 1
    - 1.0
        - 1.1
        - 1.2

You can see at a glance that the second method above may appear a little nondescript. This also leads us into providing each competency an ID. The ID provided for each competency must be unique across the entire platform. For example you may have several frameworks each with unit 1 so you can't simply use the number 1 again.

Providing useful identifiers for competencies will help tutors understand what this competency is for/part of (once again very useful if you have the same competencies over multiple frameworks).

A popular idea is to use the **unique course ID** if your company uses these for your courses outside of the platform (e.g. X101, X102, X103 etc)

So for the example below (where full names have been used) you can see the ID's in brackets in red to illustrate how these will always be unique across the entire platform.

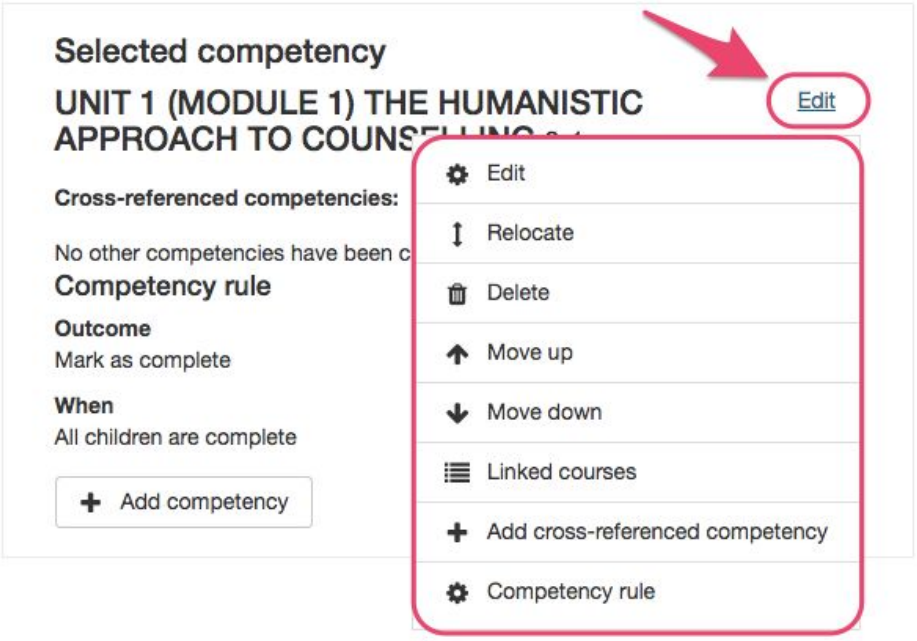
- UNIT 1 - THE HUMANISTIC APPROACH TO COUNSELLING (*L4C - Unit 1*)
    - 1. Understand the key concepts of the person-centred approach to counselling (*L4C - 1.0*)
        - 1.1 Evaluate the key concepts of the person-centred approach to counselling (*L4C - 1.1*)
        - 1.2 Apply theory to practice (*L4C - 1.2*)

As mentioned previously it's important to provide easily identifiable names and IDs to help tutors understand what they're rating competencies for.

You also have the ability to select a different scale for each competency if you wish to rate certain competencies differently to others within the same framework. The default setting for this is set to "**Inherit from competency framework (default)**". When adding or editing a competency simply click "**Save Changes**" to confirm your changes.

Editing Competencies

Once you have started creating competencies you then may wish to make changes or amendments to these. In order to make changes to a competency simply select the competency from the left hand panel, then on the right hand panel click the **Edit** button at the upper right of this area. This will reveal a dropdown with the following options.



- **Edit** - Clicking this will allow you to make changes to the name, description and ID. You will be unable to change the scale if users have been rated against this competency.

- **Relocate** - Allows you move the competency within the framework.

- **Delete** - Allows you to delete the competency from the framework.

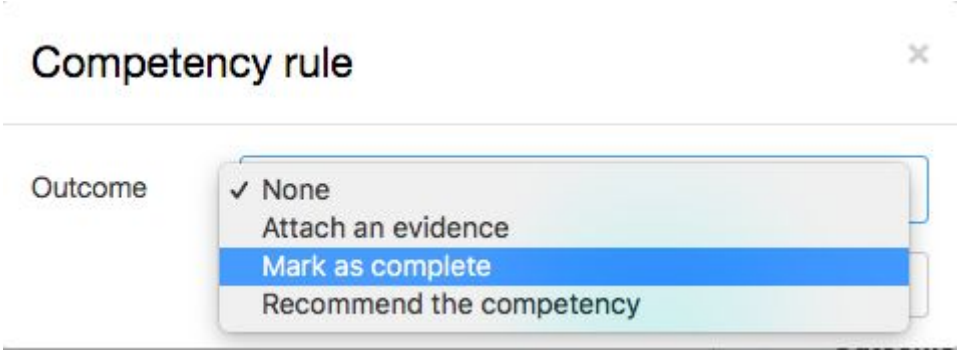
- **Move up** - Moves the selected framework upwards in the list but will not move the competency out of the parent competency.

- **Move down** - Moves the selected framework downwards in the list but will not move the competency out of the parent competency.

- **Linked courses** - A window will appear showing you the courses where this competency has been linked. Clicking a link will take you to the corresponding course.

- **Add cross-referenced competency** - Allows you to cross-reference competencies to show which are related to one another. There is no additional mechanism here, simply a way to identify related competencies.

- **Competency rule** - Here you have the ability to create rules to trigger automatic actions such as auto completion based on certain criteria for child competencies. When selecting this option you are asked for an **Outcome** and **When**. Please note that when adding a new competency it will warn you that the rule set will be removed and must be re-added if desired.



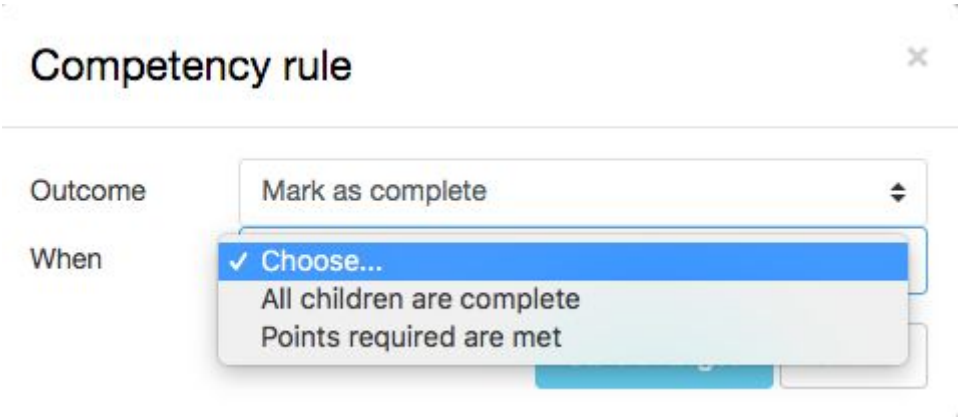
The options available are as follows:

- **Attach an evidence** - Adds a text evidence note against the competency with the date/time but the status or rating does not alter.

- **Mark as complete** - This outcome means the parent competency will be marked with the default status for this scale. Be warned this may not be a value that is "proficient".

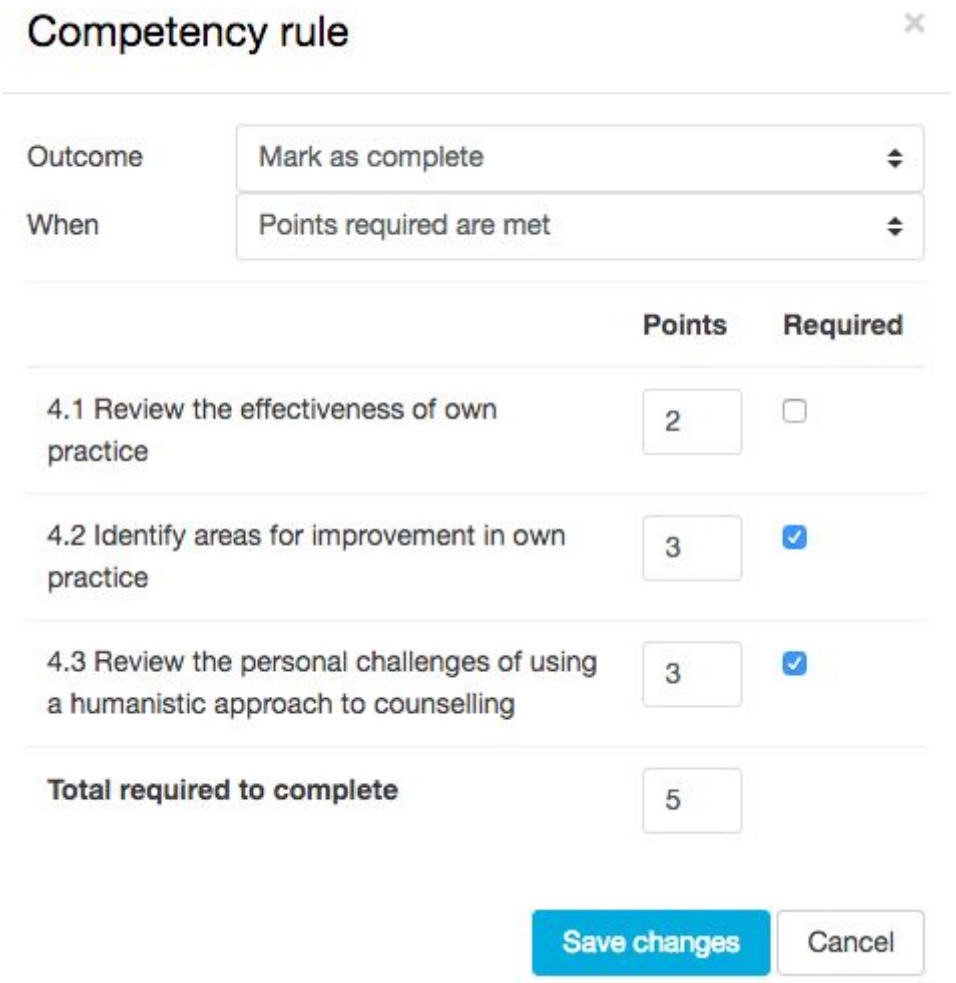
- **Recommend the competency** - This outcome changes the status of the competency to "Waiting for review", indicating to a tutor that the competency needs to be reviewed/rated. If you are using the learning blocks for notifications, a notification will appear here for this due to the status change of the competency.

You must then select a value for "**When**".



- **All children are complete** - When all child competencies are completed.

- **Points required are met** - Points give you the possibility to add weight to child competencies towards completing the parent one (Some may be more important competencies). In the following example the completency will be marked as complete when 5 points are achieved. The different child competencies have been given different weights (values) to express a difference in their importance alongside 2 of the child competencies being required.

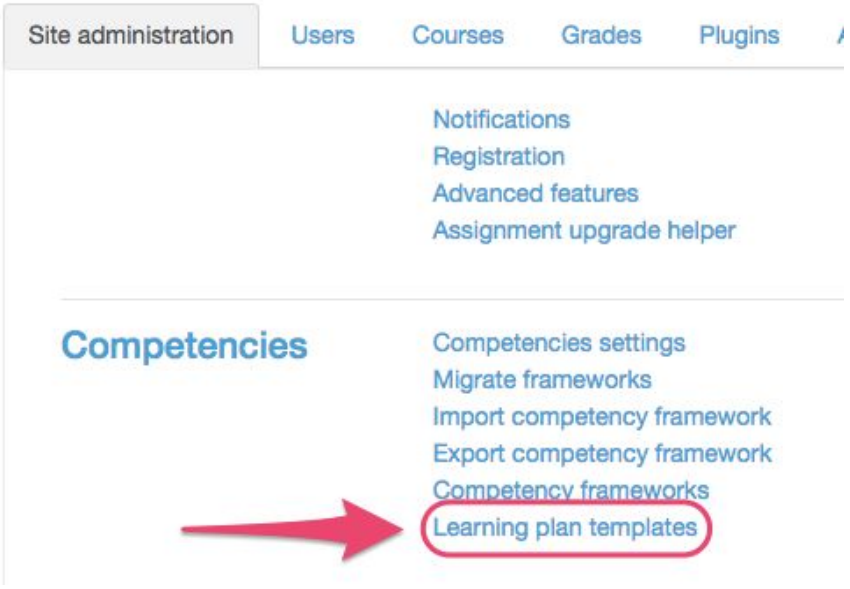


Using these rules competencies can automatically be marked as complete based on their child competencies and the criteria that you set for them.

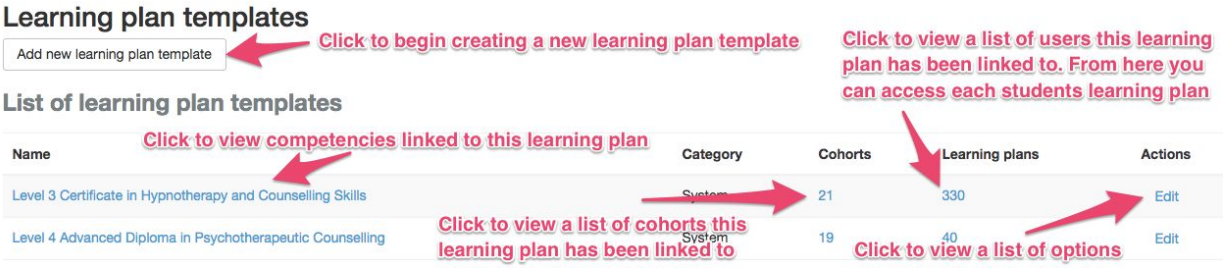
Creating a Learning Plan

A learning plan defines a set of competencies which you can assign to an individual or group of users. Learning plans can be particularly useful if there are a selection of competencies over multiple frameworks that you wish you assess in one location as opposed to over several courses.

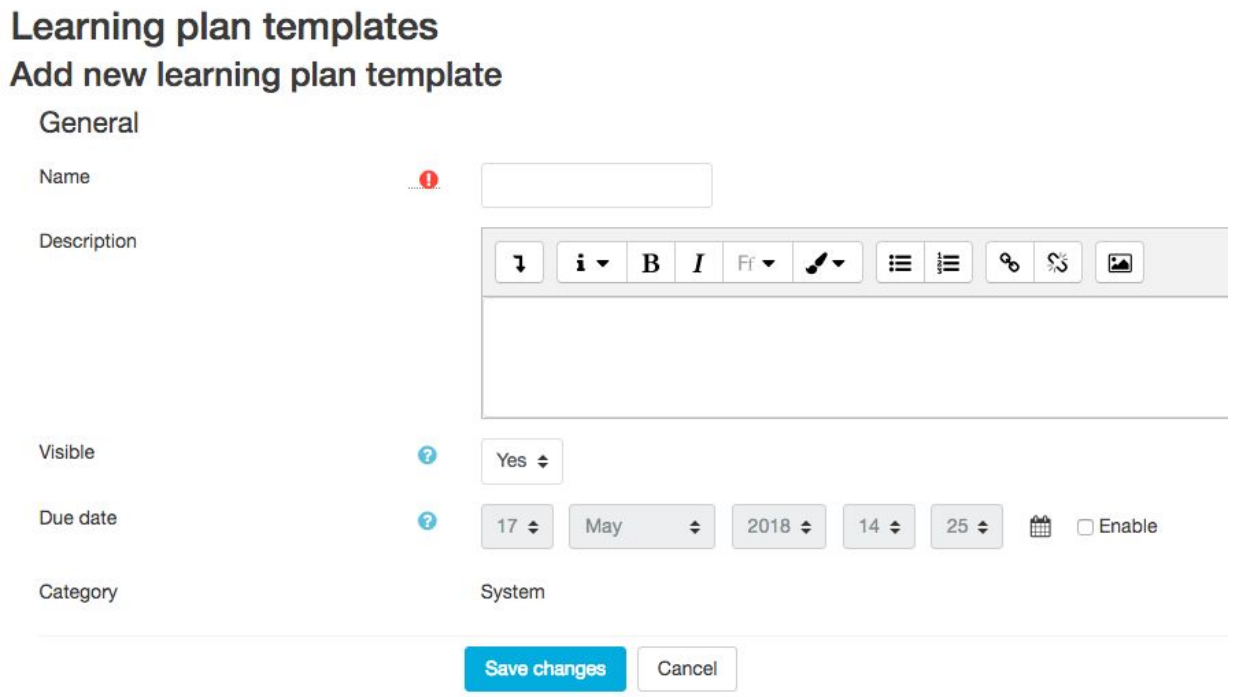
In order to access Learning Plan templates you must first access **Site admin > Competencies > Learning Plan Templates**.



Here you will be able to view any existing learning plan templates and create new templates.



Click the **Add new learning plan template** button to begin this process.

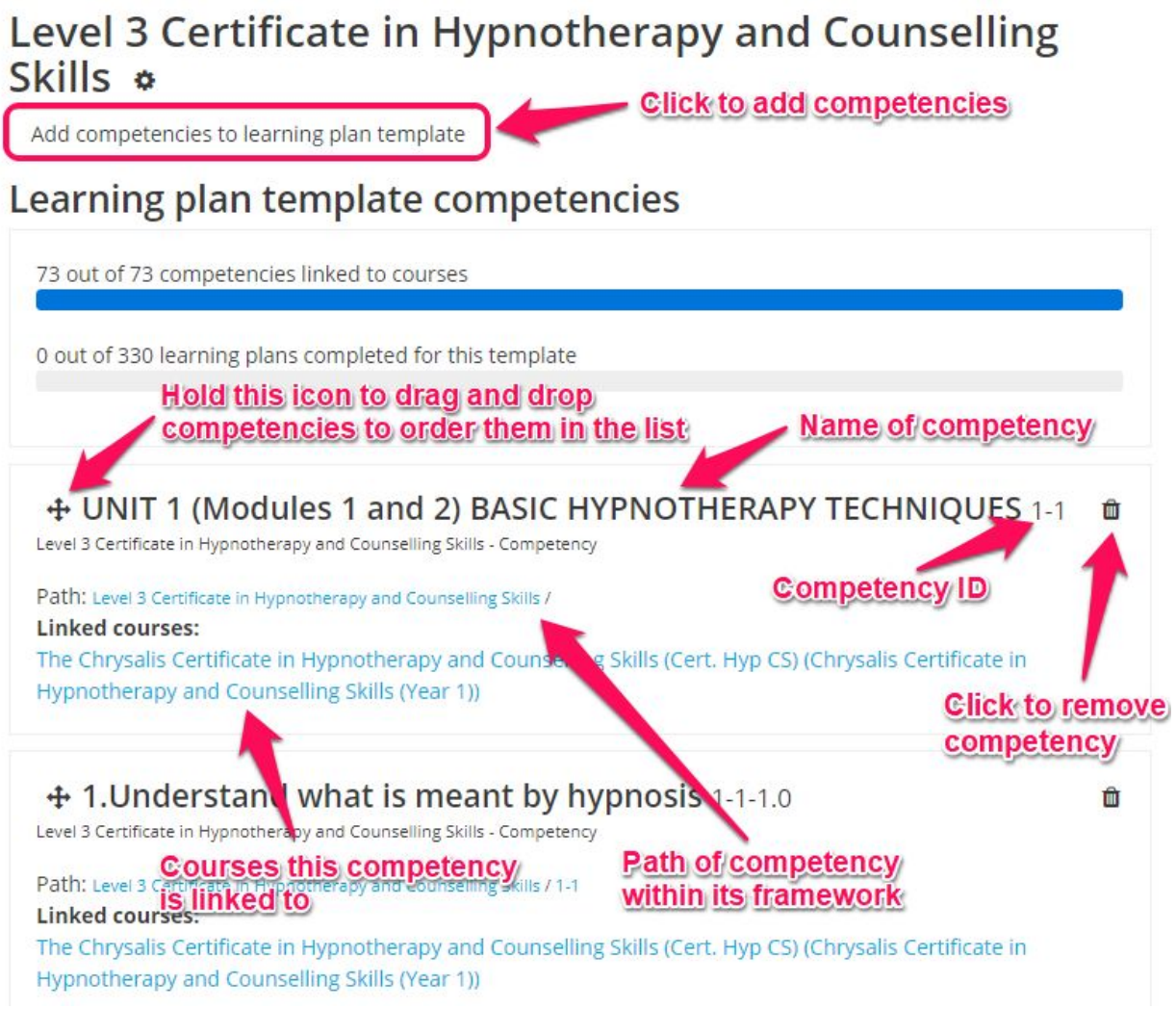


First add the name of the learning plan template. If your learning plan is going to hold the competencies of one particular framework then you may wish to just match that name so it is easily distinguishable.

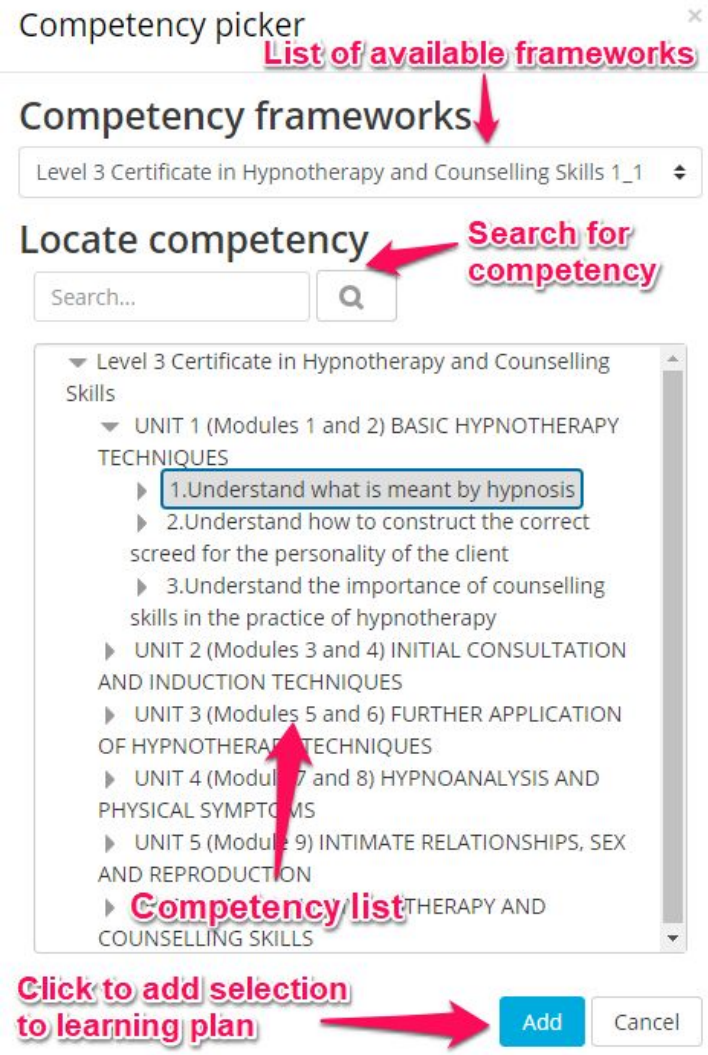
You may provide a description of the learning plan if you wish and can choose whether the learning plan is currently visible by choosing **Yes** or **No** from the dropdown list. You may wish to set a due date for the learning plan however in many cases this probably will not be necessary. Once you are happy with your settings click on **Save changes** and you will return to the learning plans list.

Adding competencies to a Learning Plan

In order to begin adding competencies to learning plans simply click the name of a learning plan in the learning plan templates list. You will be shown any competencies already present in this learning plan and are able to move/order them on this page along with seeing how many competencies are linked to courses.



By clicking **Add competencies to learning plan template** you will be presented with an overlay where you can select a framework then search for/select which competencies you wish to add to this learning plan template.



You are able to expand each parent competency to reveal child competencies within. If for example you wish to add all competencies from a framework you are able to expand all of the parent competencies, select the first competency in the list then holding the select button you can then select the competency at the bottom of the list to select these and all the competencies in between. Alternatively if you want to select a number of competencies simply hold Ctrl (Apple:Command)on your keyboard and select your desired competencies.

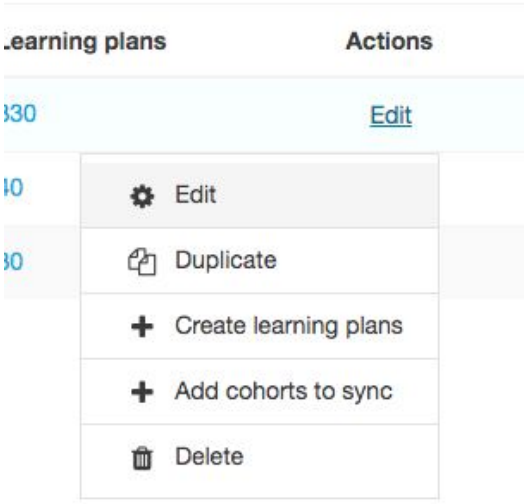
Once you are happy with your selection, click the **Add** button to add the selected competencies to the learning plan template. You will be taken back to the list of competencies that have been added to this learning plan template.

Linking a learning plan manually

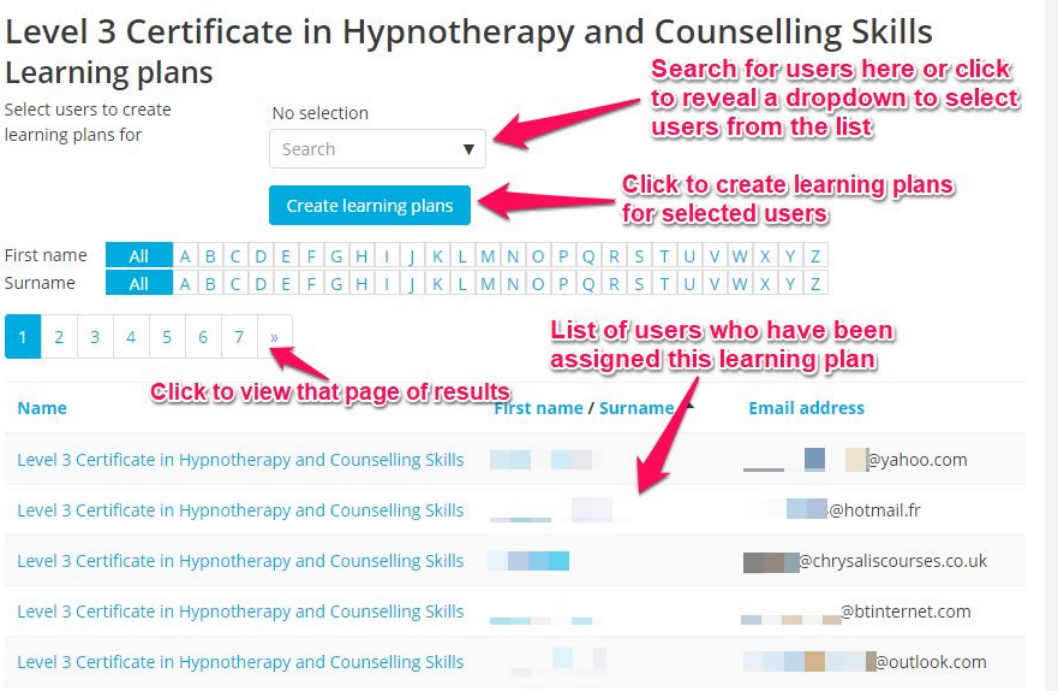
Once you have created a learning plan, you can begin linking users to the learning plan template.

In order to access learning plan templates you must first access **Site admin > Competencies > Learning Plan Templates**.

From the list of learning plan templates click on **Edit** in the right hand column to be shown the following options.



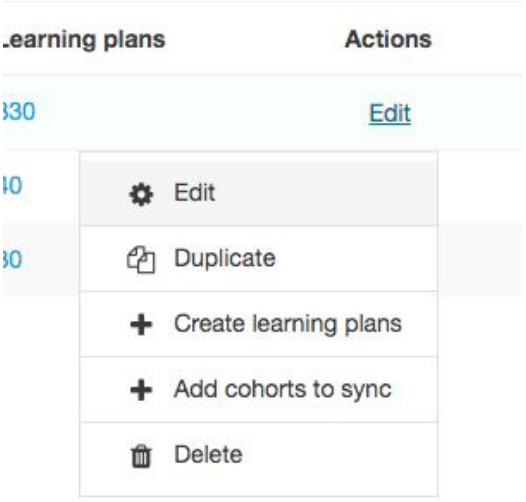
Click **Create learning plans** from this dropdown to be taken to the following screen where you can search for individual users to be linked to the plan.



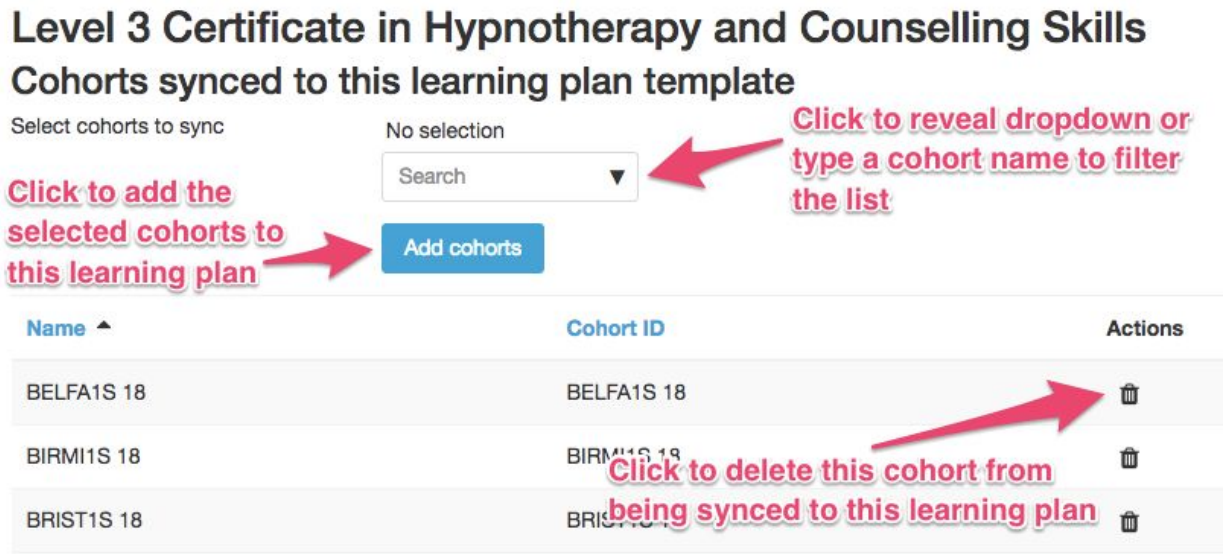
Here you are able to search for a specific user (or users) using the dropdown box then click **Create learning plans** to add them. New users added to this learning plan will then be listed in the area below the selection section.

Linking a learning plan by user cohort

In order to access Learning Plan templates you must first access **Site admin > Competencies > Learning Plan Templates**. From the list of learning plan templates click on **Edit** in right hand column to be shown the following options.



Click **Add cohorts to sync** from this dropdown to be taken to the following screen where you can search for cohorts to be linked to the plan.



You can select one or more cohorts from the dropdown list. Once happy with your selection click the **Add cohorts** button to add them to the synced cohorts list below. When new users are added into that cohort they will automatically be synced with that learning plan.

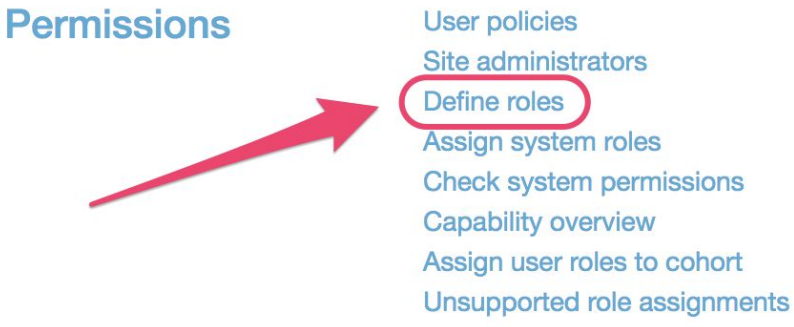
Creating a Competency Reviewer Role

By default competencies are reviewed by accessing a learning plan directly or alternatively from within a course where competencies are present. Later in this guide we will cover the "**Send for review**" feature which means when learners complete activities, any linked competencies can be sent for review.

This section is only relevant if you use cohorts within the platform.

Course tutors cannot by default review competencies when their learners request them, since competencies and learning plans exist outside of a course context, whereas the role of tutor is assigned in the course context. Administrators have the ability to use the learning plans block (often placed on the dashboard) to be alerted to when competencies require review. In order to allow tutors to be able to do this we must create a Competency Reviewer role and assign this to users at a system level. This is required for the learning plans block functionality because learning plans sit outside of a course context (at a site level). Please note: Competencies reviewed using the learning plans block will not be reflected within a course when viewing the competency breakdown report.

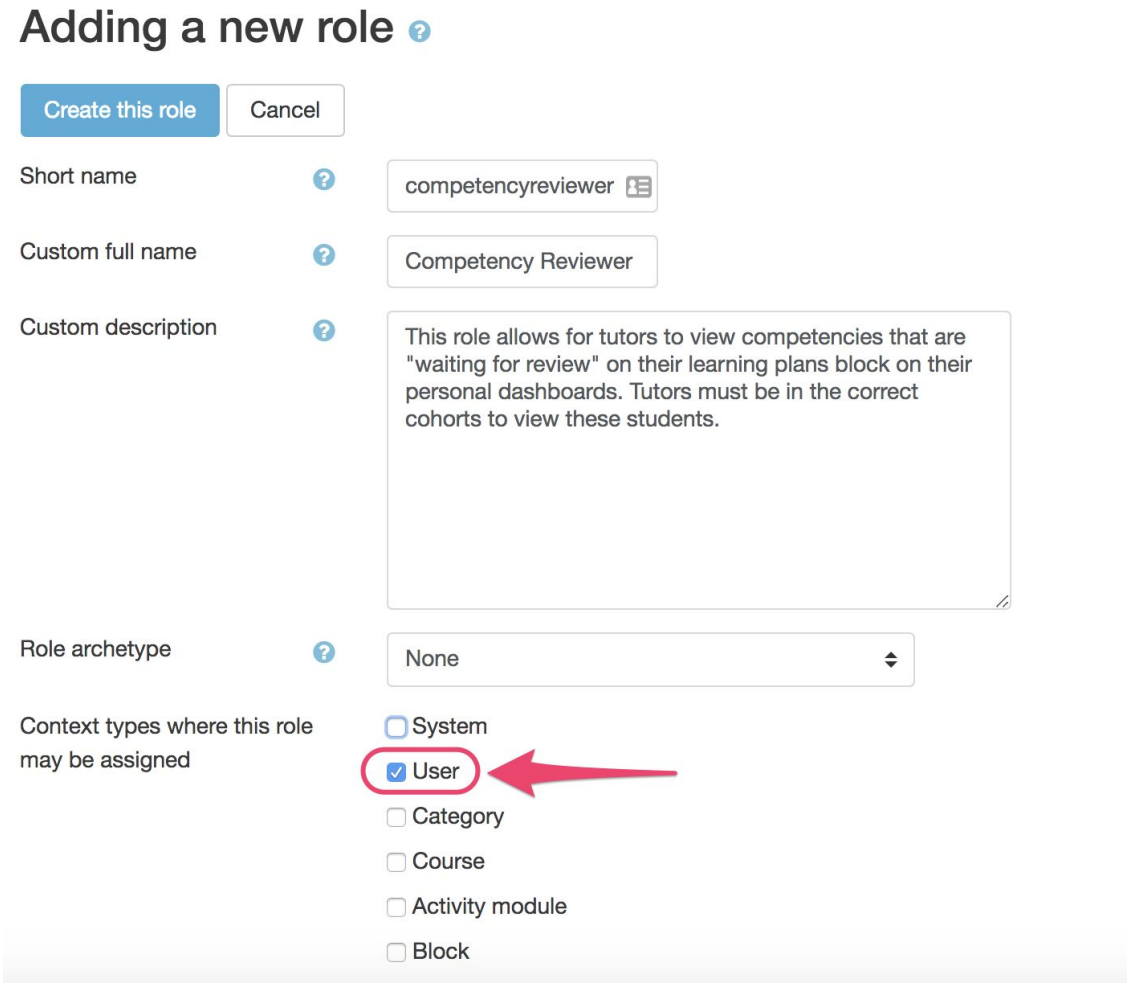
In order to do this you must first access **Site admin > Users > Define roles**.



You will be presented with a list of existing roles available on the platform. If you scroll to the bottom of this window you then can select the **Add a new role** button.

On the first screen you can leave the default settings and click on the blue **Continue** button. You will then be able to begin adding the short name, full name and description of

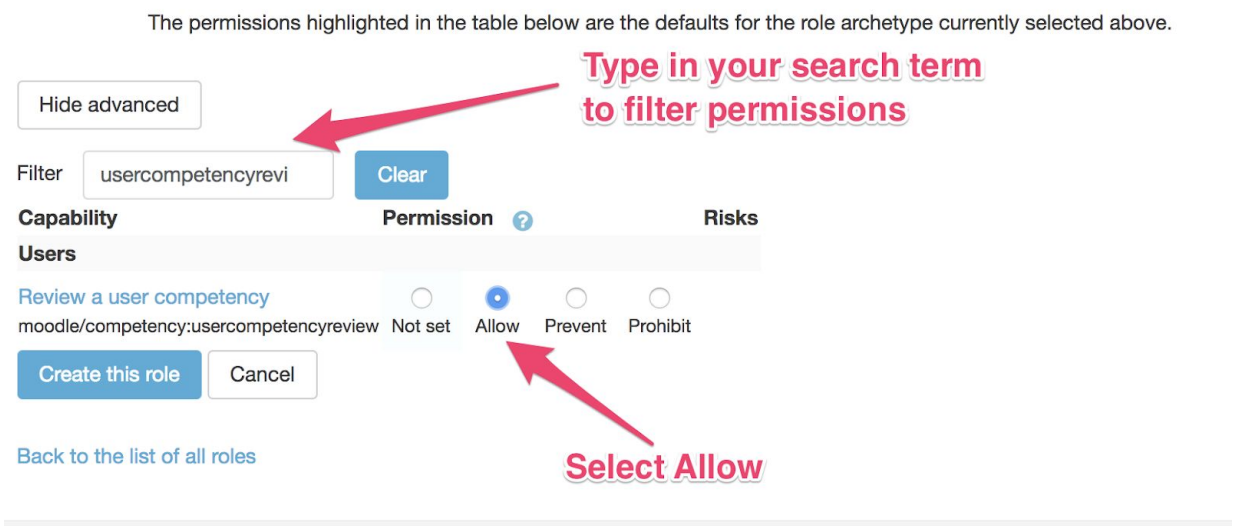
this new role. You may wish to name & describe the role as per the following screenshot.



It is important to leave the **Role archetype** as **None** and for the **Context types** setting select **User**. You can tick **System**, but this will then mean the tutors assigned this role will see all competencies on the site. Normally a tutor would only review those in their course.

Scrolling further down this page will present you with the custom permissions area. Here you can manually search the list or use the text field to filter the results below so you can find certain roles. The key roles you need to set to **Allow** are as follows:

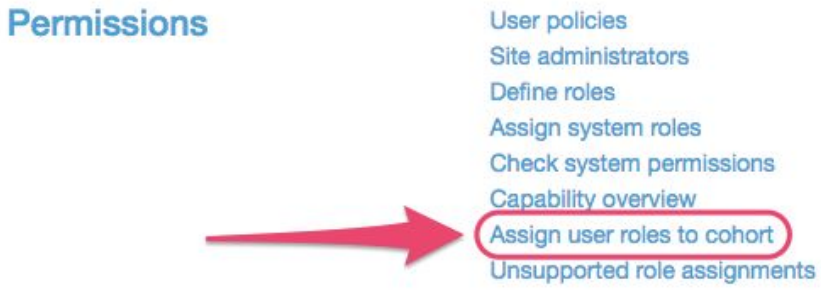
- usercompetencyreview
- usercompetencyview
- competencygrade



Once you have found and modified the permissions for this role, click on **Create this role** at the bottom of the page.

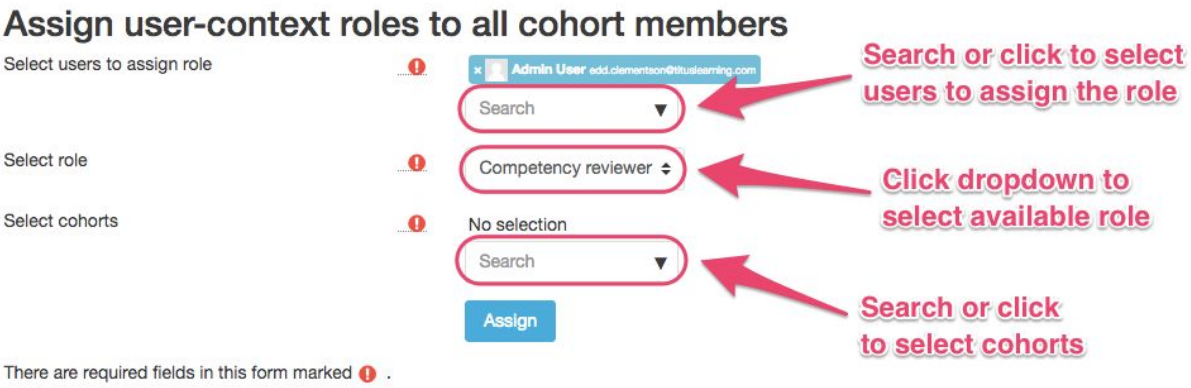
Assigning a Competency Reviewer role

Once you have created the Competency Reviewer role you must then assign this to the relevant individuals on the platform. Firstly, navigate to **Site admin > Users > Permissions > Assign user roles to cohort**.



In the following screen the section towards the bottom displays existing role assignments to cohorts. At the top of the screen you can assign your user-context role of Competency Reviewer.

Click the dropdown for **Select users to assign role** in order to manually search for users or begin typing in their name into the text field to filter your results. Selected users will appear just above the search box.



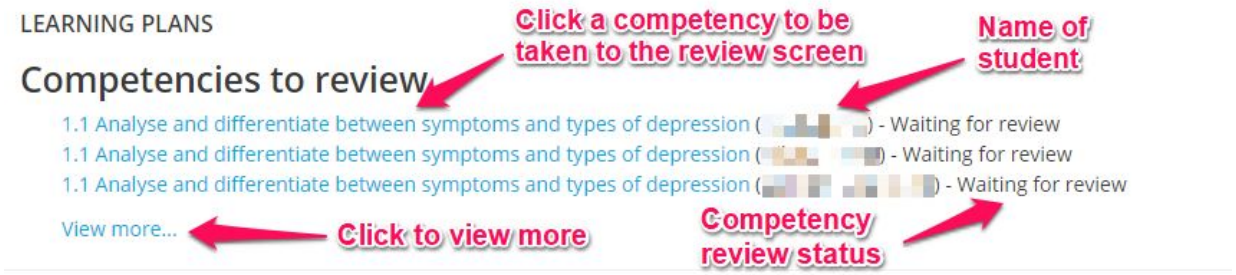
The **Select role** dropdown allows you to select any roles created with a user context. In this example select **Competency Reviewer**. You are then able to select one or more cohorts from the **Select cohorts** dropdown by searching through the list or by manually typing in a cohort name. You can select multiple cohorts if desired.

Once you are happy with your selection of users, role and cohorts click on the **Assign** button to save these changes.

What can a Competency Reviewer see?

The purpose of the Competency Reviewer role is to allow tutors to view competencies on Learning Plans that are waiting for review on the **Learning Plans** block. Please note: Competencies reviewed using the **Learning Plans** block will not be reflected within a course when viewing the competency breakdown report.

By default the Moodle platform will have the **Learning Plans** block available on the user dashboard. This can easily be added by a site administrator and will look similar to the example below when competencies are waiting for review.



A maximum of 3 competencies will display by default. Click **View more...** to see a list of all competencies waiting for review. Upon clicking a competency name from this short list or alternatively from the full list, you will be taken through to the competency rating area. This will be explained in more detail later in this guide.

It is important to remember that competencies that are sent to this Learning plans block act as notifications. So for example if a competency is set to **Waiting for review** it will appear here in this block (for the correct users depending on how this has been set up).

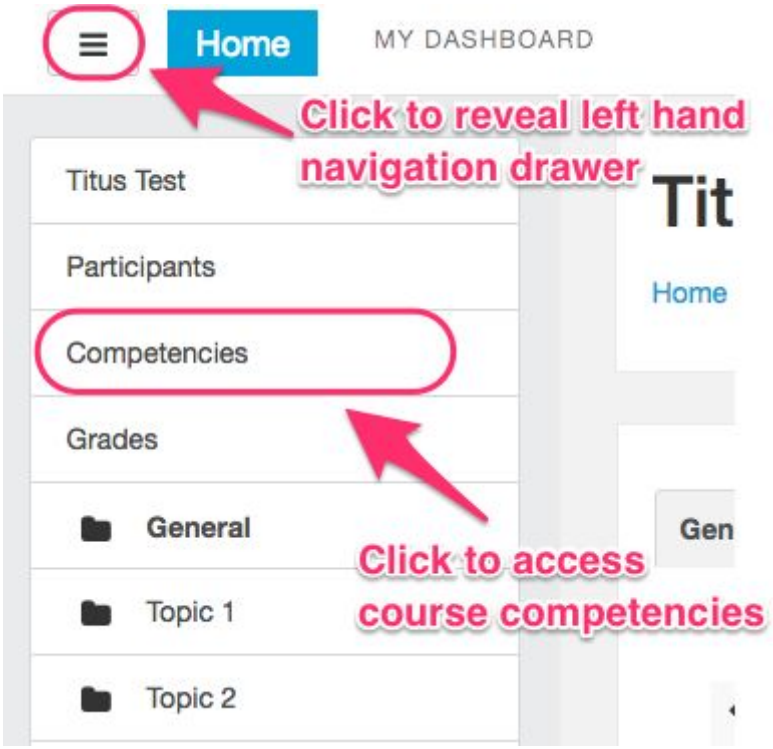
If a competency is rated from this block then the notification will be removed from here and the appropriate status/rating will be applied (to the learning plan, not reflected back in a course). However if a competency is rated from a course (e.g. from the **Competency Breakdown** report), this will not affect the notification sent to the **Learning Plans** block. If using the **Learning Plans** block it is advisable to advise tutors/tutors to use this method for

rating competencies otherwise this can cause confusion or duplicate effort reviewing competencies. In order to remove a notification from this block the review status must be changed from **Waiting for review**.

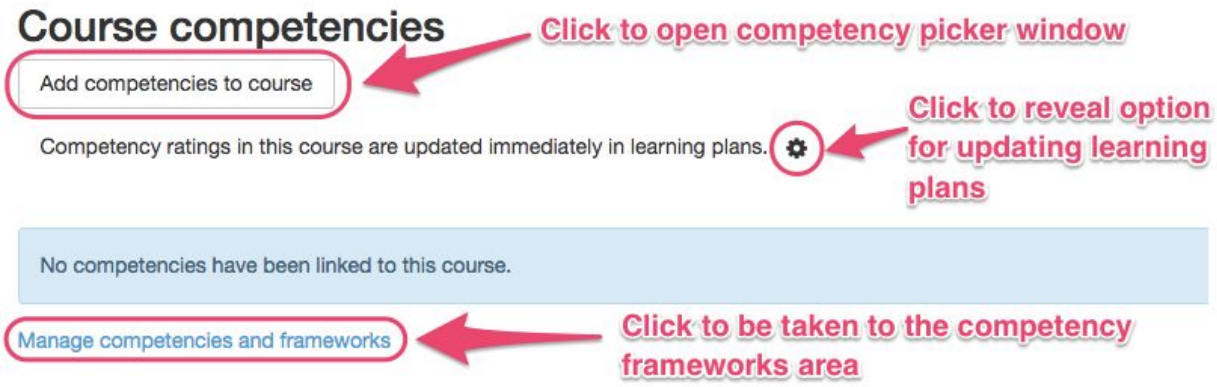
Linking Competencies to a Course

Once a competency framework exists you will most likely want to link your competencies to a specific course. You'll then be able to link these competencies to specific activities to further help your tutors understand which assignments relate to which key skills/learning objectives (competencies).

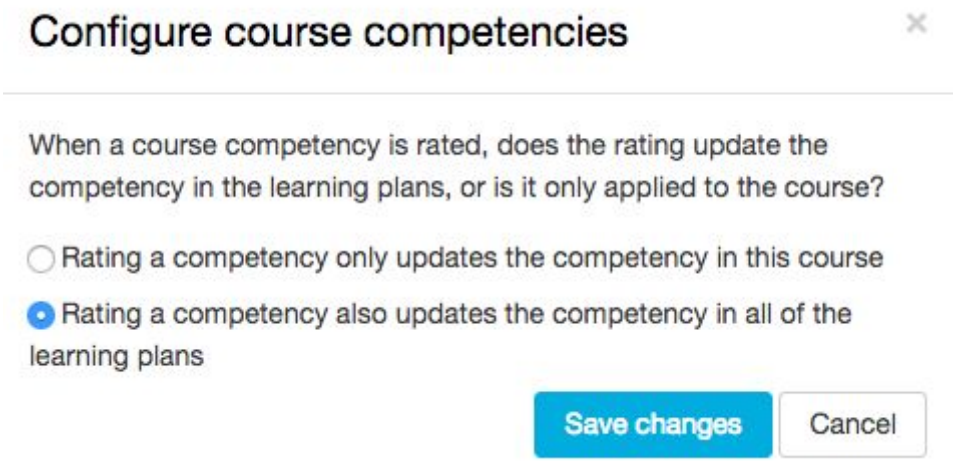
To do this, navigate into the course you wish to link competencies to and access the **Competencies** area. This may differ depending on the theme used. If utilising bootstrap 4 then you can expand the left hand navigation drawer by clicking the burger menu at the top left of the platform followed by clicking the **Competencies** option.



This will take you through to the **Competencies** area where you can begin adding competencies.

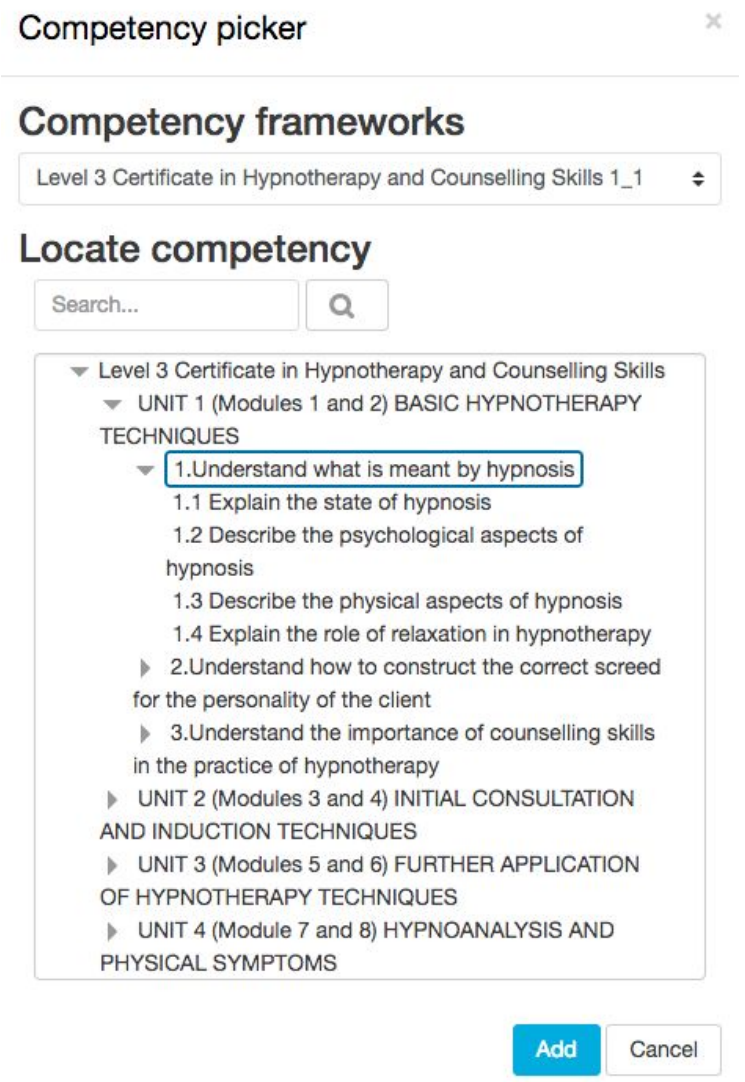


By clicking the cog icon (see screenshot) you can determine the action taken when competencies are rated within your course. It is highly advisable to select **Rating a competency also updates the competency in all of the learning plans**.



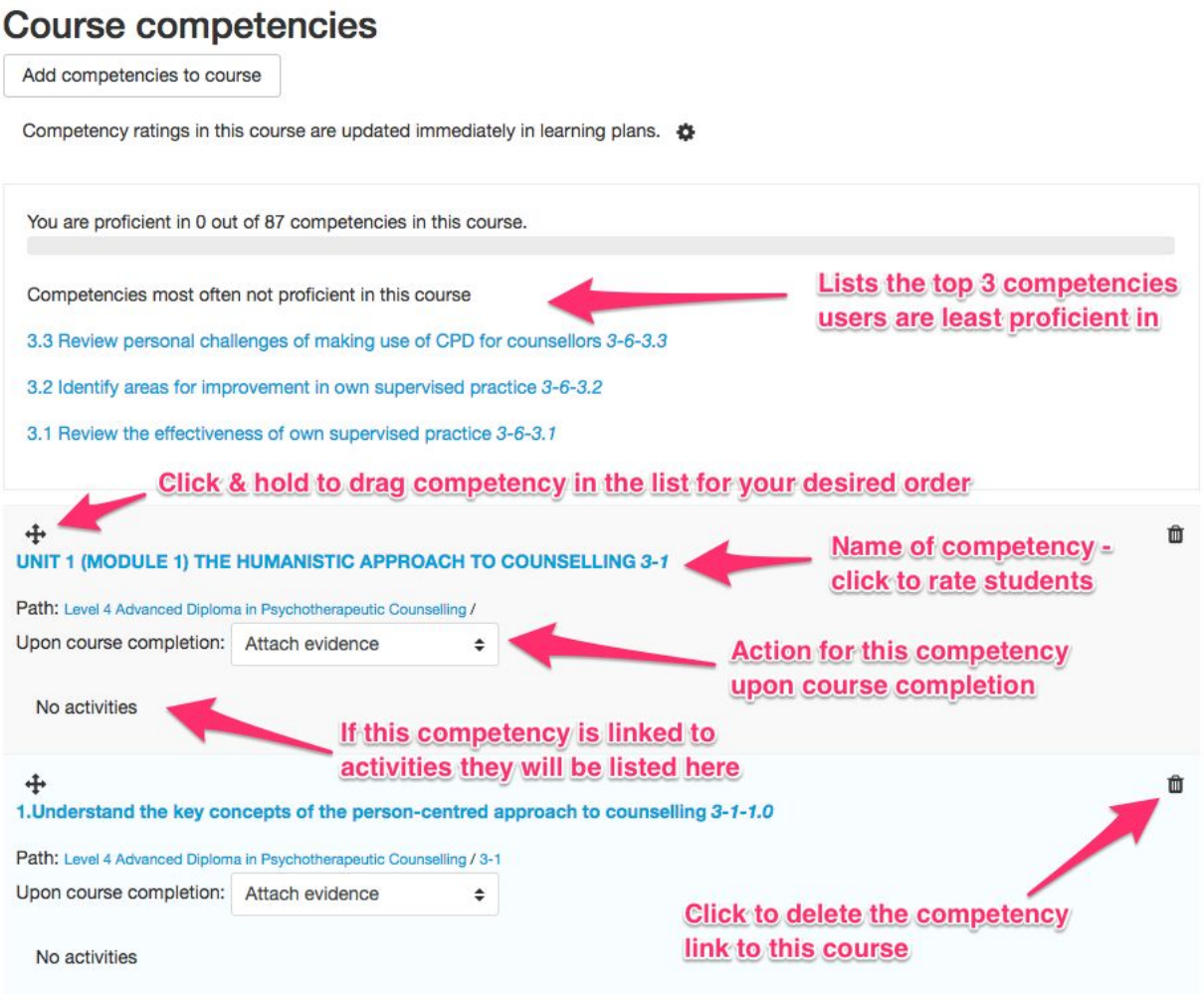
This means that when a tutor rates a competency within this course, if applicable it will also be fed back into the user's learning plan.

In order to begin adding competencies click the **Add competencies to course** button. This will reveal a competency picker window. Firstly, select the framework from the dropdown list.



You can then either select individual competencies or hold Ctrl (Apple:Command) on your keyboard to select multiple competencies. Alternatively if you want to select every competency in a framework, click the arrows to the left of the parent competencies to reveal all of the child competencies within. Hold shift on your keyboard then select the top and the bottom competency on the list. This will select all of the competencies in between.

Clicking the blue **Add** button will add your selection to the course and take you back to the list of linked competencies.



When you have competencies linked to a course you will see a list of these in the central area of the page. Towards the top there will be a list of the top 3 competencies that are most often not proficient in this course.

Below this are the competencies that have been linked to this course. You may wish to re-order these by using the drag icon at the top left of each competency to move them up or down in the list. Each competency listed will display the name of the competency, when this is clicked it will take you to a screen where you can begin rating competencies against learners in this course.

Upon course completion is only relevant if your users will be completing courses and activity completion is turned on. Using the dropdown you can select an action for each competency when a course is finished. You may wish this to be left on "**Do nothing**" or potentially even "**Complete the competency**" however the latter does mean that there is no certainty tutors will actually be checking the quality of a learners work if auto completion is on.

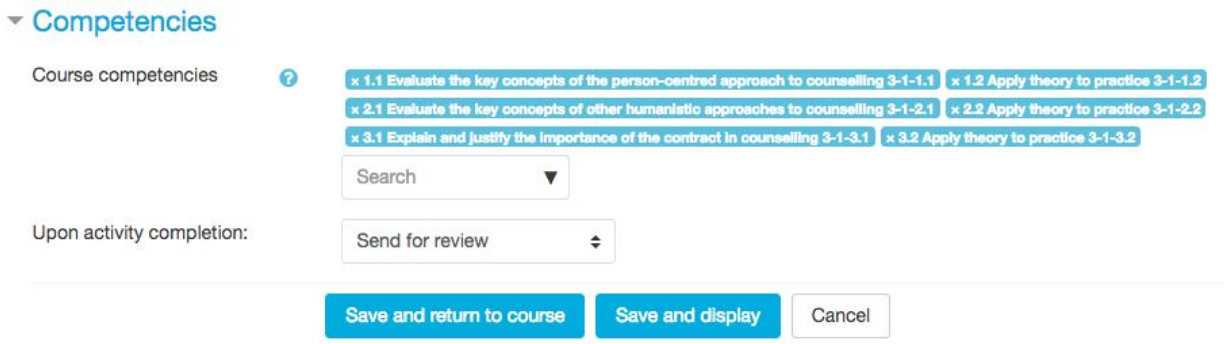
If any competencies have been linked to specific activities these will be listed below the relevant competency.

If you wish to unlink a competency from a course you can do so by clicking the bin icon at the top right of each competency.

Linking Course Competencies to Activities

Once you have linked competencies to a course, you then have the option to link competencies to specific activities.

Within your course you must first add an activity, for example an assignment. When you are viewing the settings for an activity there will be section titled **Competencies**. In this area is a search box. You can click in this box to reveal a selection of competencies linked to this course, or begin typing in a competency name. Selecting a competency will add it to the selection area above in blue. You can continue adding competencies to an activity.



Upon activity completion allows you to choose an action when this activity has been completed by the learner. If you are going to the effort of linking competencies to activities then you will want to select **Attach evidence**. This means that, providing the previous steps have been followed, a text record will be added to the competency stating that the linked assignment has been completed.

Once you are happy with the competencies added to the activity click either of the blue **Save** buttons.

Rating Competencies

It is possible to rate competencies in more than one way..

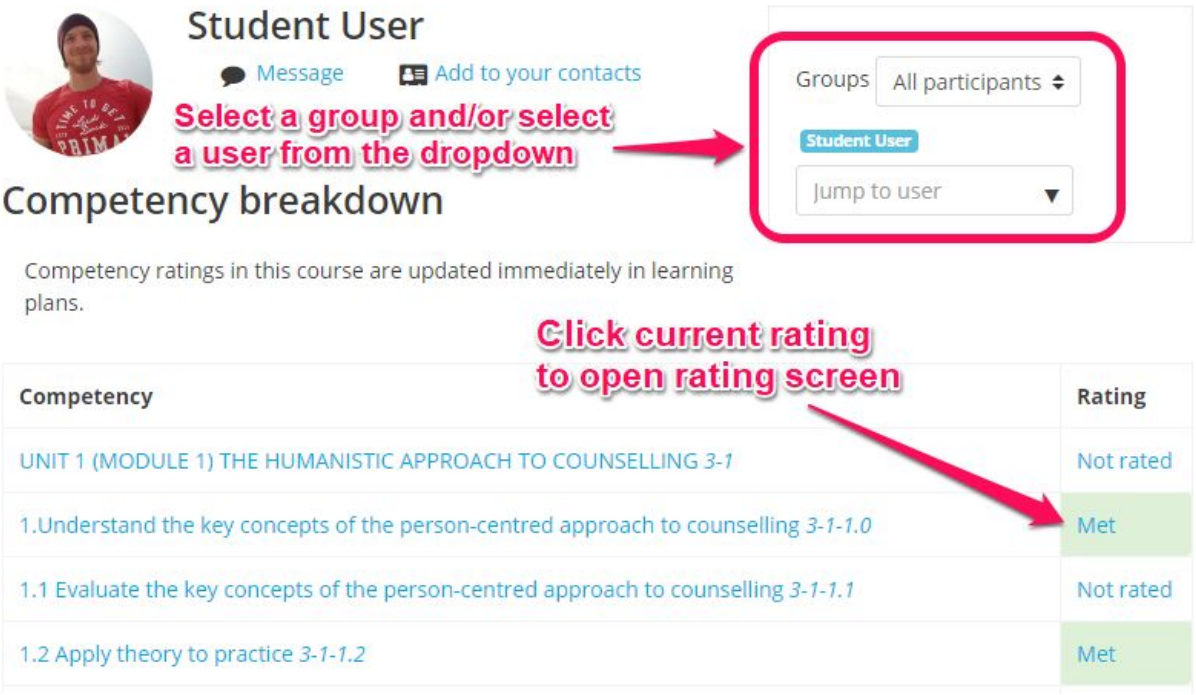
1) **Competency Breakdown report** (from a specific course)
2) **Learning Plans block** (from wherever the **Learning Plans** block is present)

Rating from a course - Competency Breakdown Report

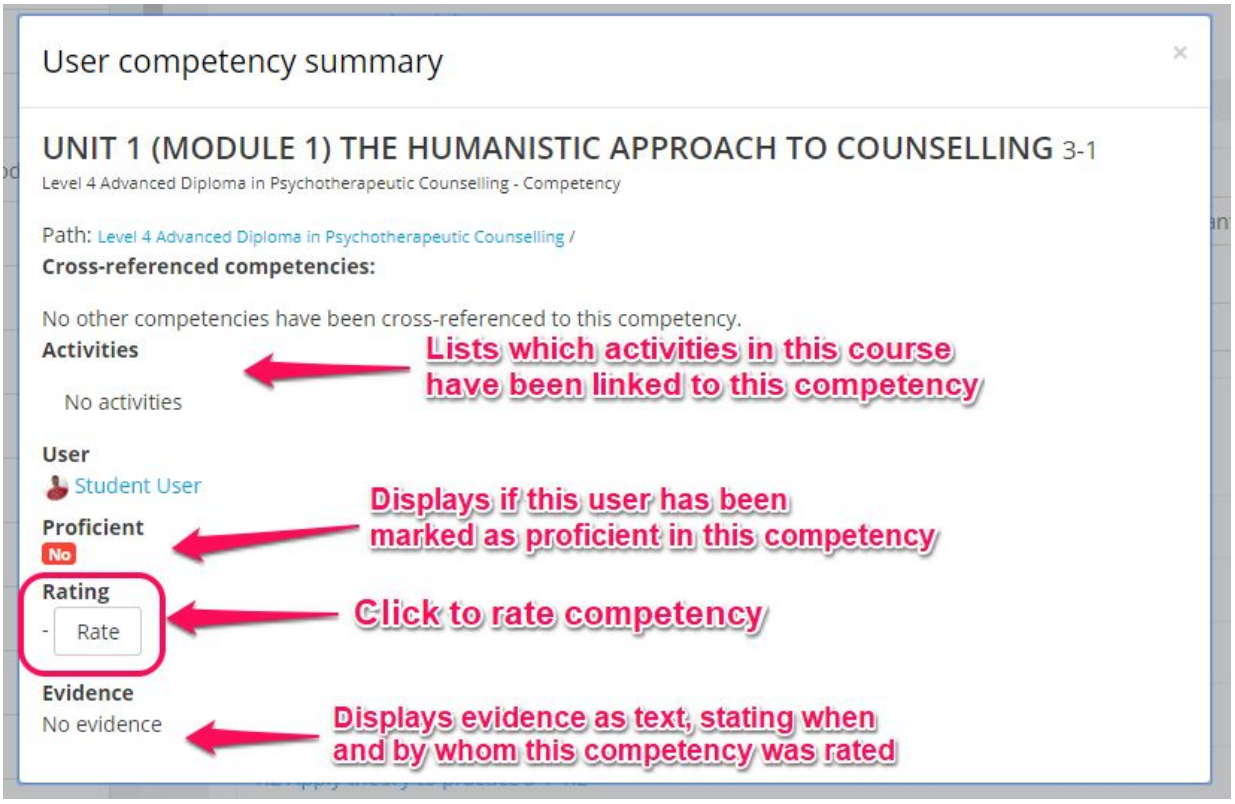
The main way a tutor can rate a user against a set of competencies is from within a course itself.

When in the desired course the tutor can access the **Competency Breakdown** report. This is under the **Reports** section of a course.

This will provide you with a list of a competencies linked to this course and a method in which you can search for or cycle through your users in order to provide ratings for them.



In order to rate a competency click the current rating in the rating column to take you to the following screen.

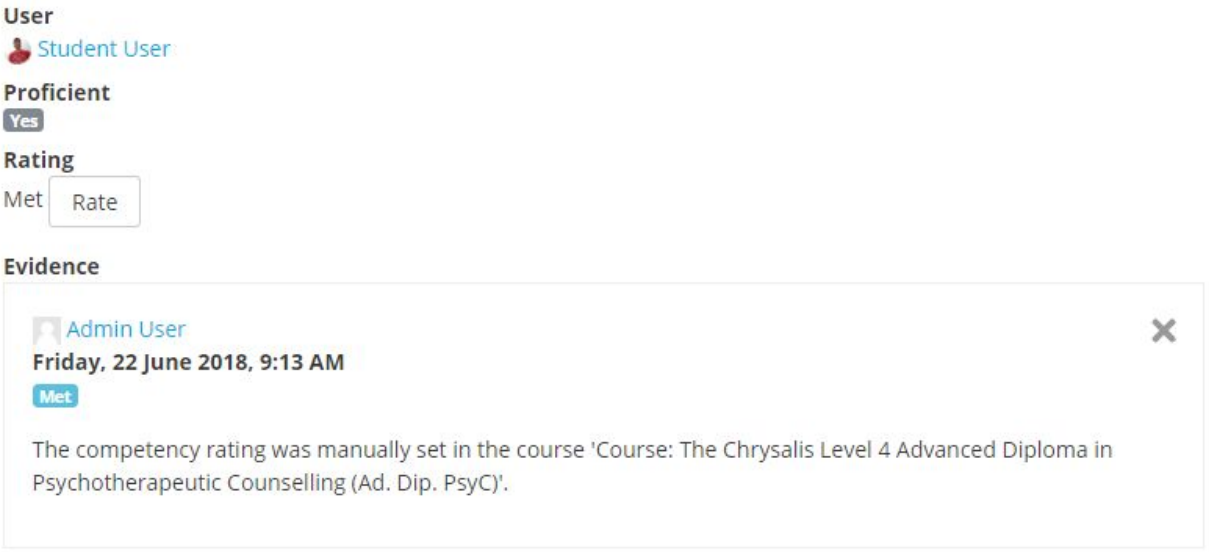


On this screen is some basic information about the competency itself alongside:

- **Activities** - Lists which activities in this course have been linked to this competency
- **User** - Displays the currently selected learner
- **Proficient** - Displays Yes or No depending on if the current rating is proficient based on the assigned scale.
- **Rating** - Allows you to rate the competency.
- **Evidence** - Displays evidence as text, stating when and by whom this competency was rated.

By clicking the **Rate** button you will be able to choose a rating from the dropdown menu and enter any notices you wish alongside this rating.

By clicking **Rate** you will be returned back to the rating and review area.



As seen in the above screenshot the rating has been set to **Met** and the proficient status is now **Yes**. Alongside this is the evidence notification displaying the date, time, user and description of the update made to this competency.

Rating from the Learning Plans Block

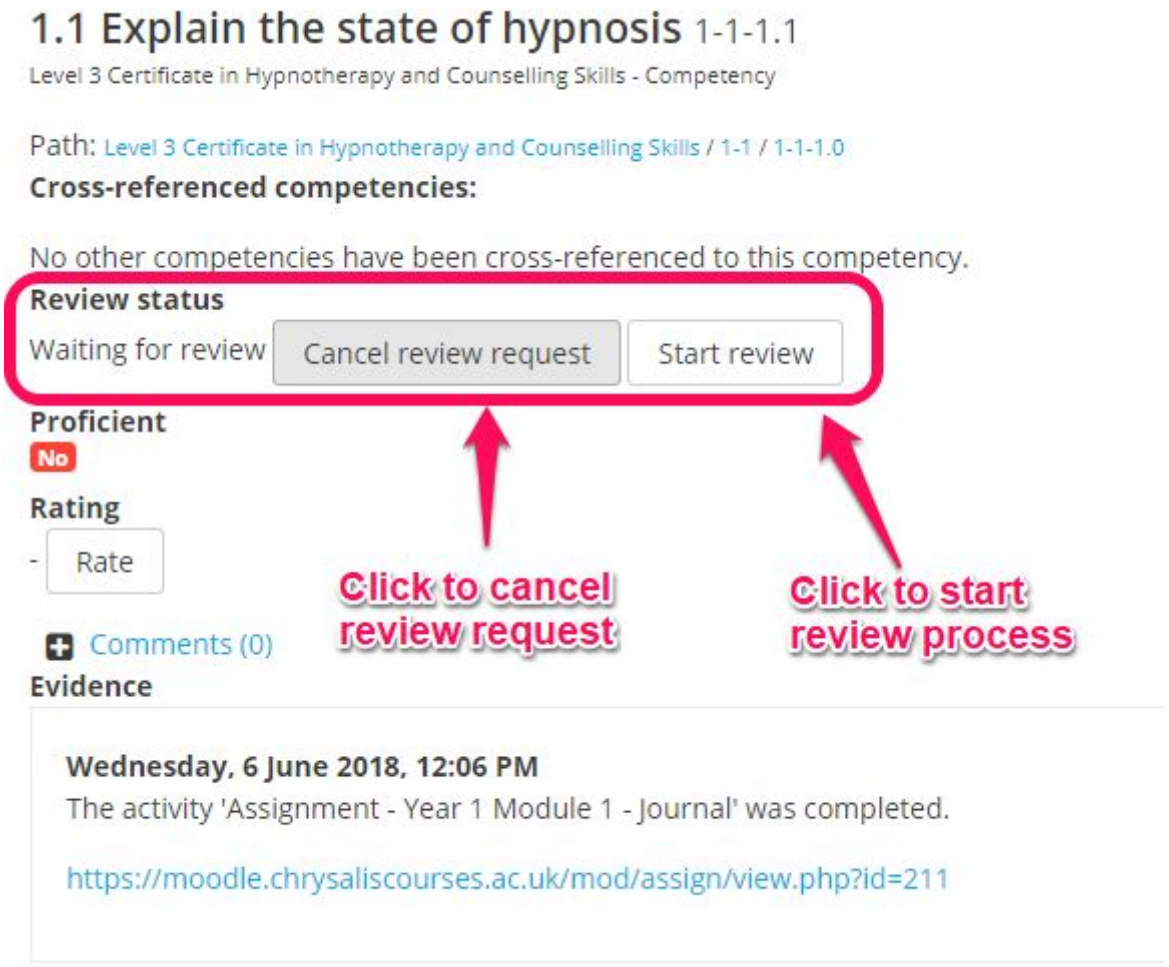
As previously explained in this guide it is possible to use the Learning Plans block to receive notifications here for competencies that are waiting for review. Please note: Competencies reviewed using the learning plans block will not be reflected within a course when viewing the competency breakdown report.

A maximum of 3 competencies will display but you are able to click **View more...** to see a list of all competencies waiting for review. Upon clicking a competency name from this short list or alternatively from the full list, you will be taken through to the competency rating area.

It is important to note that from the following screen you can rate the competency just as you would from a competency breakdown report but if you do not alter the Review status then the notification will remain in the learning plans block. If a competency is rated from a

course (e.g. from the Competency Breakdown report), this will not affect the notification sent to the Learning Plans block. If using the Learning plans block it is advisable to advise tutors/tutors to use this method for rating competencies otherwise this can cause confusion or duplicate effort reviewing competencies. In order to remove a notification from this block the review status must be changed from “Waiting for review”.

When accessing a review request the **Review Status** will be as follows.

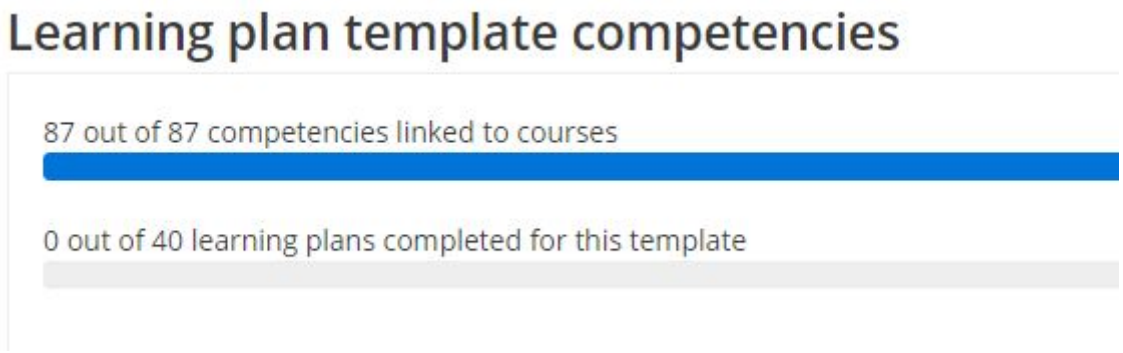


You can click **Cancel review request** to change the status back to default or click **Start Review** which will indicate to other users that you have started reviewing this. This can be useful to prevent multiple tutors reviewing the same competency at once. This will update the status to **In review** and state the users name alongside a **Finish Review** button.

When this button is clicked the status will be return to default and the competency will no longer be under review. Please note that competencies don’t have to be “under review” to have their ratings updated.

Completing a Learning Plan

It is possible for tutors to mark entire learning plans as complete. This will help keep track of how many users are currently working towards completing a given learning plan.

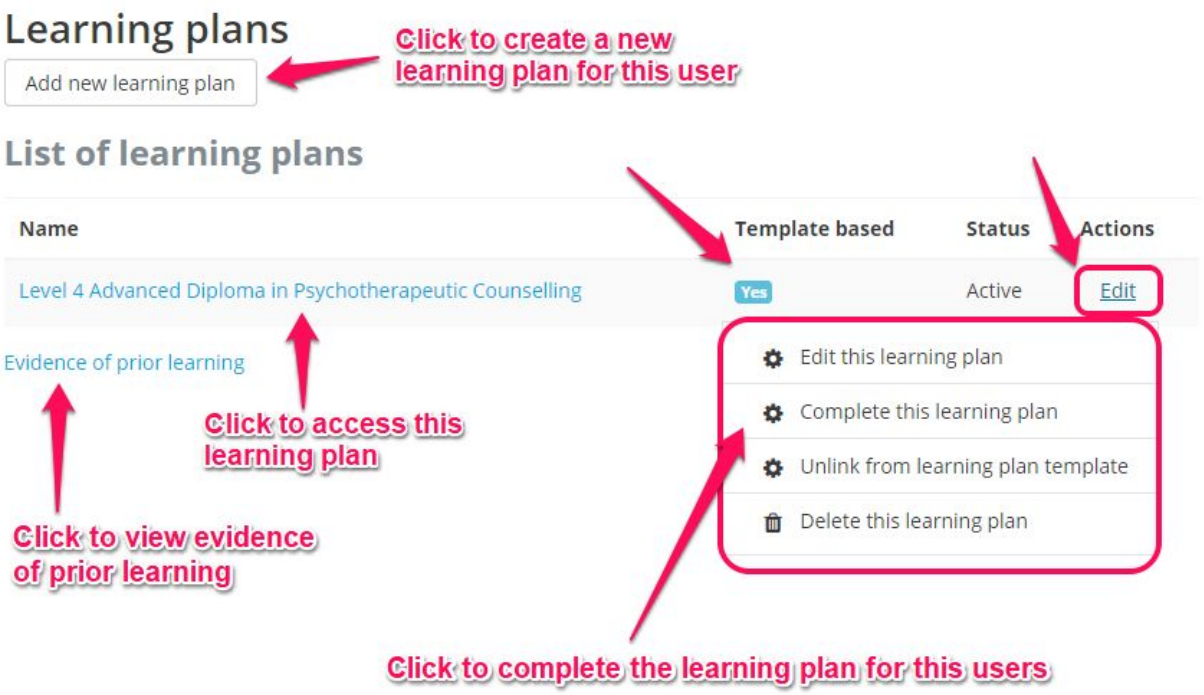


At the end of the course duration, a tutor should begin to review which users have completed the course & accompanying learning plans. An user's learning plan is accessed from their user profile.

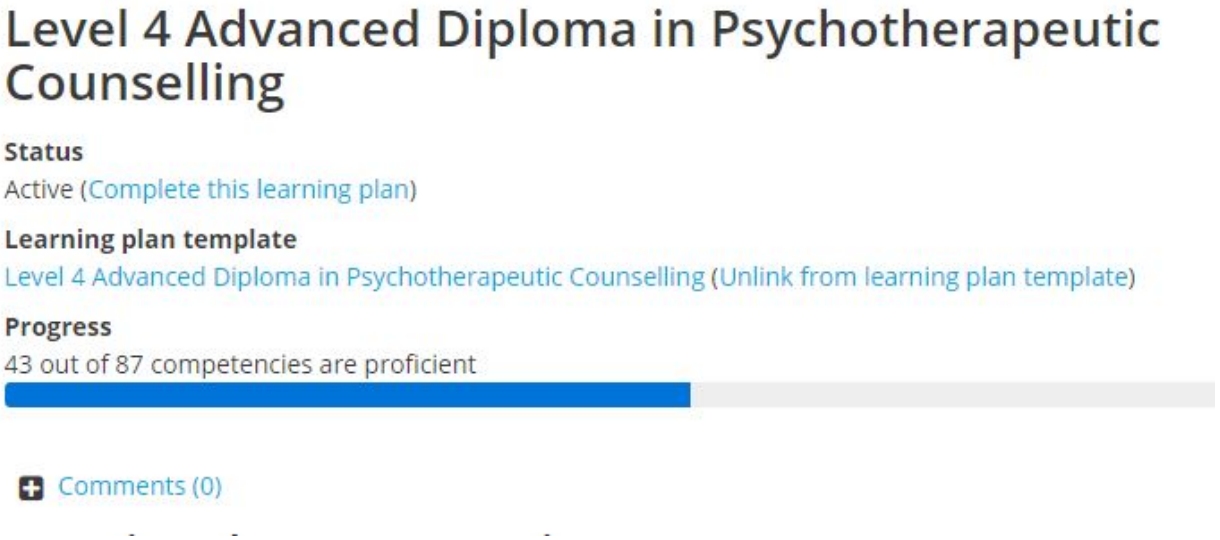
When inside a course you can access a user's profile in a multitude of places by clicking their profile photo (and sometimes simply their name). Three popular examples of doing this include viewing either the participants list, grader report or competency breakdown report and by clicking the users profile photo.

When viewing a users profile, under the **Miscellaneous** section is a **Learning plans** button.

Here you will be shown all learning plans linked to this user. Beside each learning plan is an **Edit** button that when clicked will reveal additional options.



In order to mark a learning plan as complete click **Edit** then the **Complete this learning plan** option. Alternatively click the learning plan name from the list, and then the **Complete this learning plan** button.



An administrator can access **site admin > competencies > learning plan templates**, select a learning plan then select a user and complete their learning plan here instead. It is the same action done as previously described just with a different user journey.

Reports

There are a few ways in which tutors or admins can view competency related reports depending on the setup used. If learning plans are used you are able to utilise a third party plugin to produce meaningful reports.

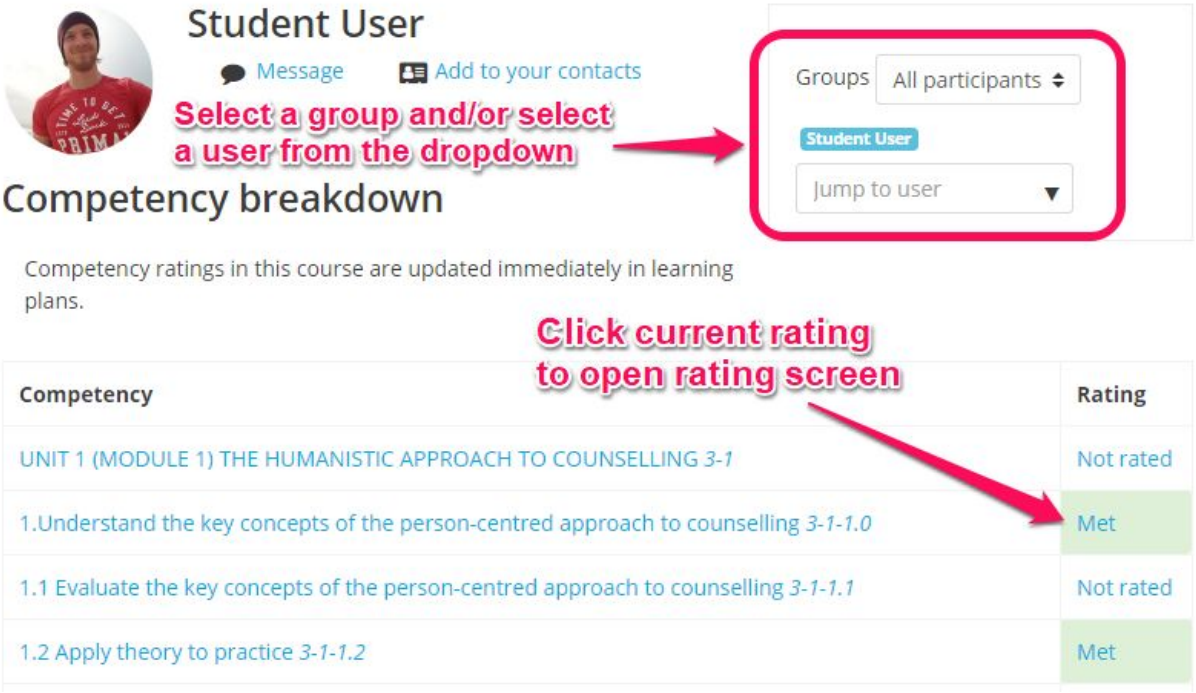
1. **Competency Breakdown Report** - Accessible via a course
2. **Monitor Learning Plans** - Accessible via site administration or a users profile
3. **Learning Plan Statistics** - Accessible via site administration or a users profile

It is possible to grant non admin users access to the Learning Plan reports by altering their user permissions.

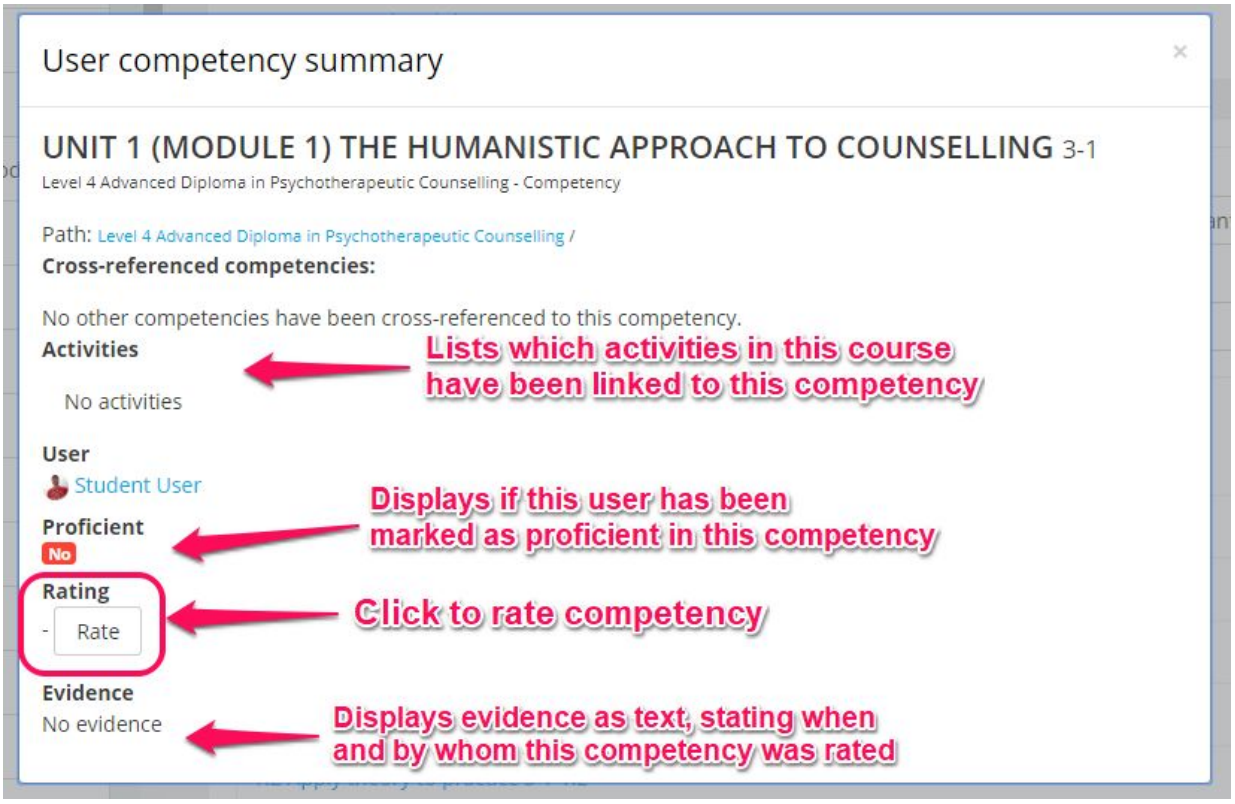
Course Competency Breakdown

Within core Moodle tutors have the ability to access a course and view the **Competency Breakdown** report. This is under the **Reports** section of a course.

This will provide you with a list of a competencies linked to this course and a method in which you can search for or cycle through your users in order to provide ratings for them.



In order to rate a competency click the current rating in the rating column to take you to the following screen with additional information.



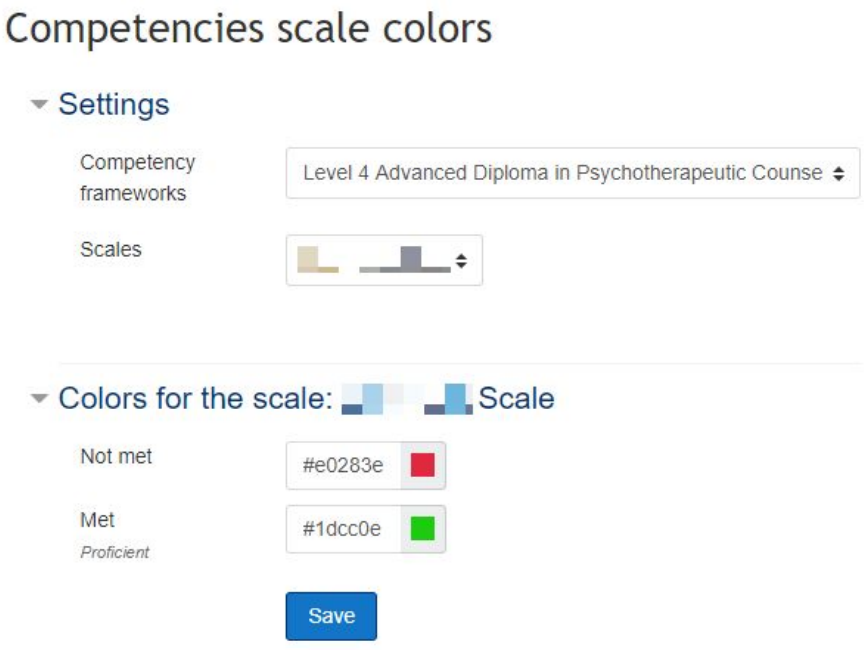
On this screen is some basic information about the competency itself alongside:

- **Activities** - Lists which activities in this course have been linked to this competency
- **User** - Displays the currently selected learner
- **Proficient** - Displays Yes or No depending on if the current rating is proficient based on the assigned scale.
- **Rating** - Allows you to rate the competency.
- **Evidence** - Displays evidence as text, stating when and by whom this competency was rated.

Customising Scale Colours

Before looking at additional third party plug reports for learning plans, it's important to look at an additional option that is part of the plugin. To fully benefit from the reports, a colour can be associated to each value of the scale. To set the scale colours:

- Navigate to **Site administration > Competencies > Competencies scale colors**
- Choose a competency framework
- Choose a **scale** from framework competency
- Set the colours values using the ColorPicker
- Save the changes



Monitor Learning Plans

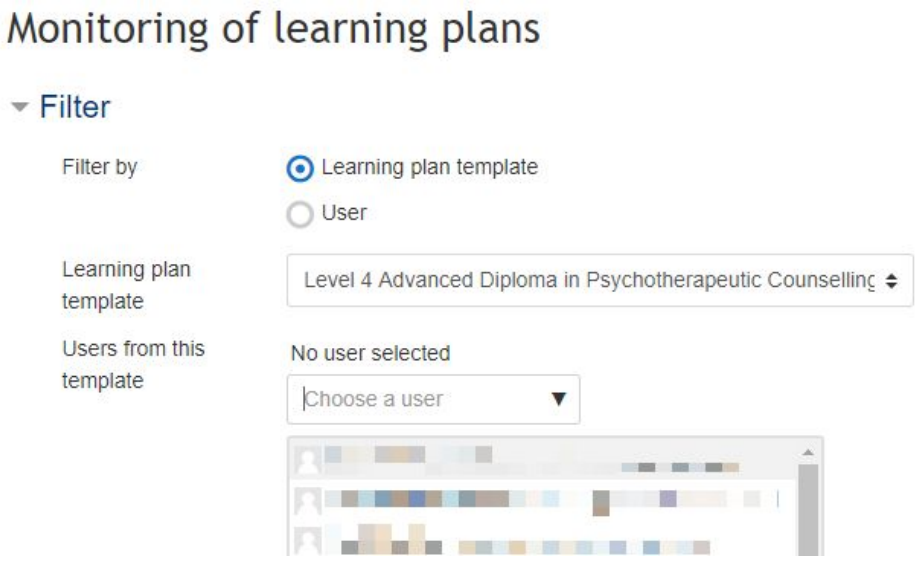
This third party plugin allows for reports to be run on learning plans and associated users in order to provide in depth analysis of users competency progress within a plan. This report can be accessed through a user's profile or by accessing **Site admin > Reports > Monitor learning plans**.

Filter by learning plan template

There are numerous filtering options available. From a learning plan template, you can filter learning plans.

- Select a **template**
- From "**Users from this template**", select a user from the dropdown menu.
- Click on **Apply**

You will see the learning plan of the learner selected, and you can navigate between learning plans based on that template. If there is no learner selected, the first learner from the template will be displayed.



By clicking on "**show more...**", you can have more options to filter learning plans by scale values.

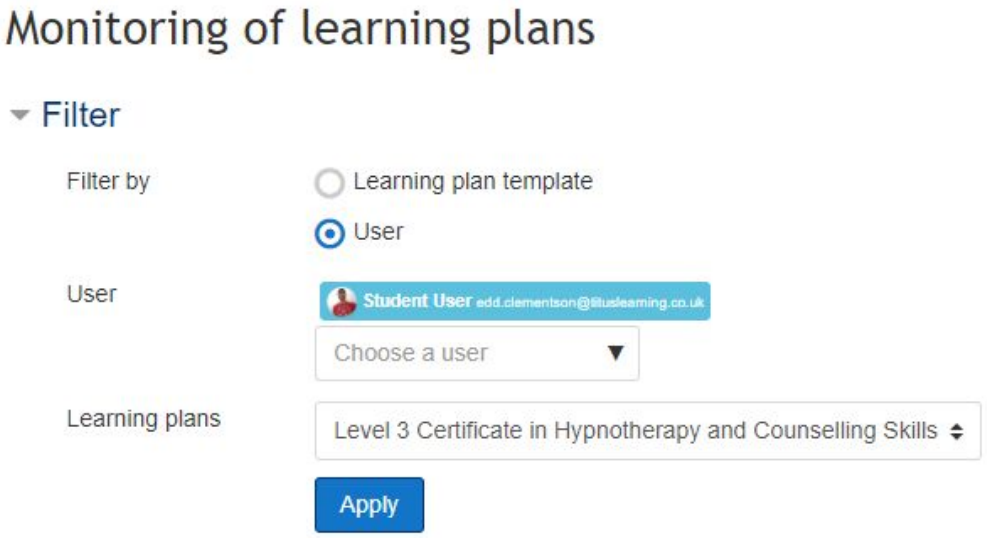
There are two options for using the scale values filter:

- Filtering learning plans by scale values from competencies rated at course level
- Filtering learning plans by scale values from competencies rated in the plan (Final rating)

When filtering by scale values, the number of ratings in the learner list will be displayed to the right of their name.

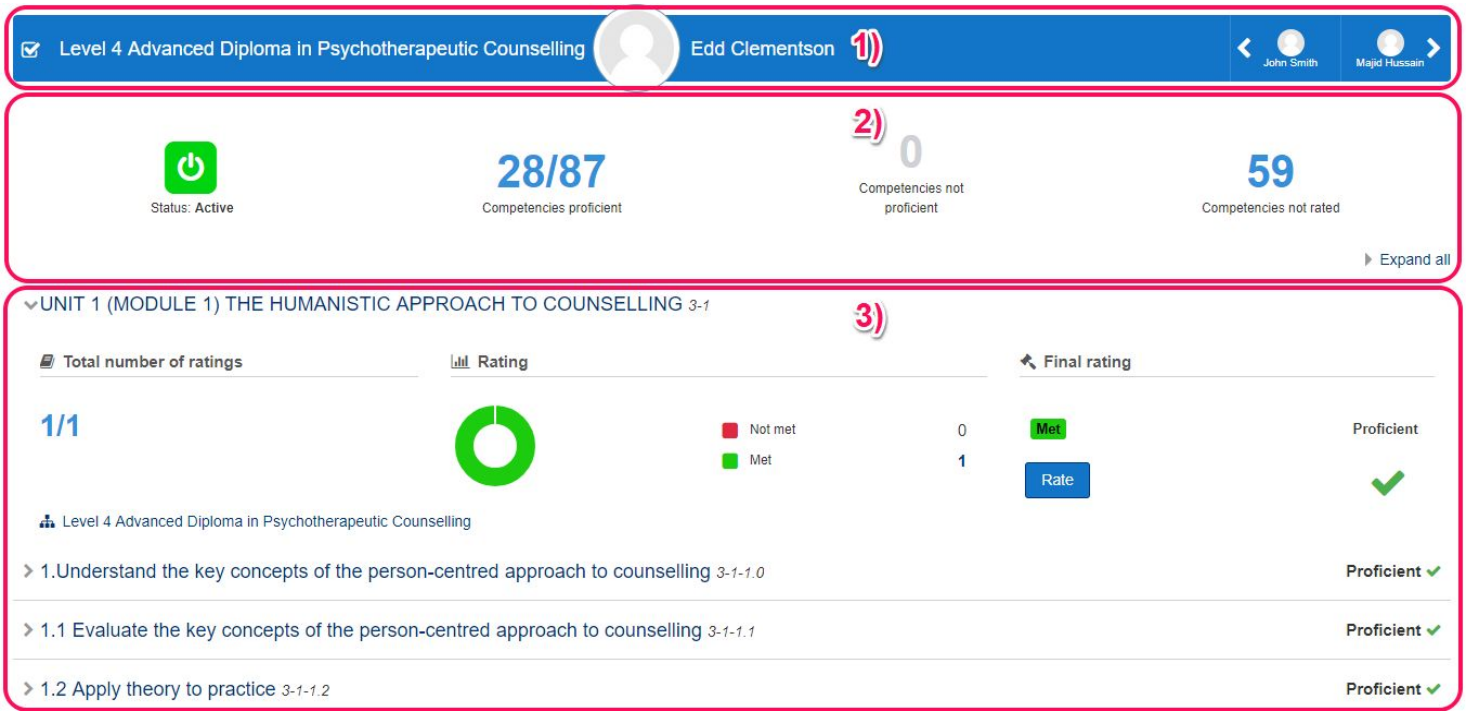
Filter by user

You can choose a particular learner by typing their name in the user picker field in order to retrieve their learning plans.



Learning Plan Details

After entering your search criteria click on **Apply** to view available results. The details of the learning plan are divided into three blocks:



1. User Navigation

This section contains the following information.

- The learning plan name > links to the learning plan page for this user.
- The user full name and a profile picture > links to the user profile page.
- The navigation between users that belong to the selected template.

2. Learning plan competencies informations

This section displays the following information.

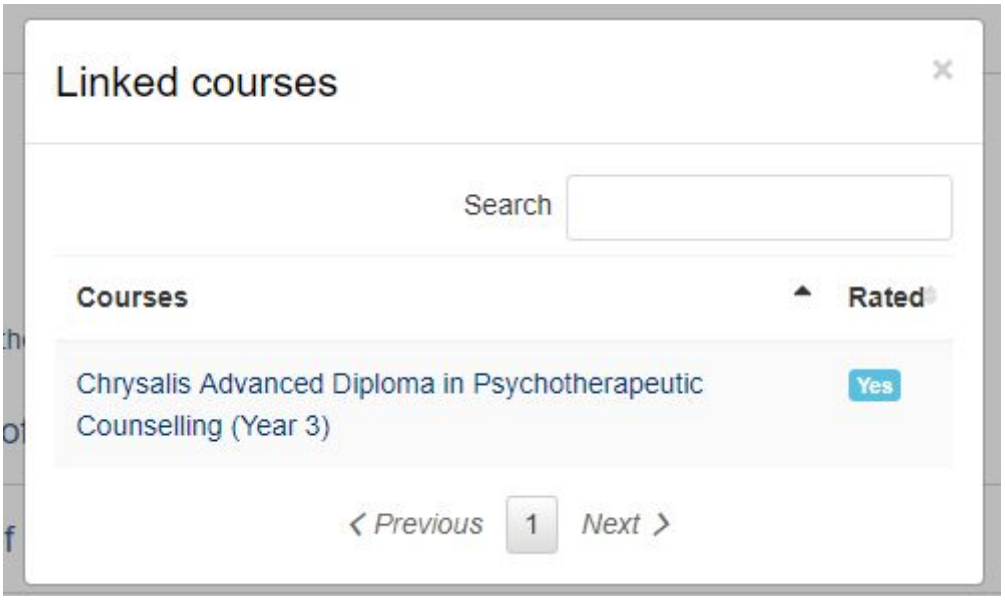
- The status of the learning plan (e.g.Active or Complete).
- The number of competencies that are rated proficient out of the total number of competencies associated with the plan.
- The number of competencies that are rated not proficient.
- The number of competencies that have not yet been rated.

3. List competencies details

Just above these 3 sections is the header/name of the competency. When clicked this will take you to the review screen for this competency for the selected user. This part below has three sections itself.

a) Total number of ratings

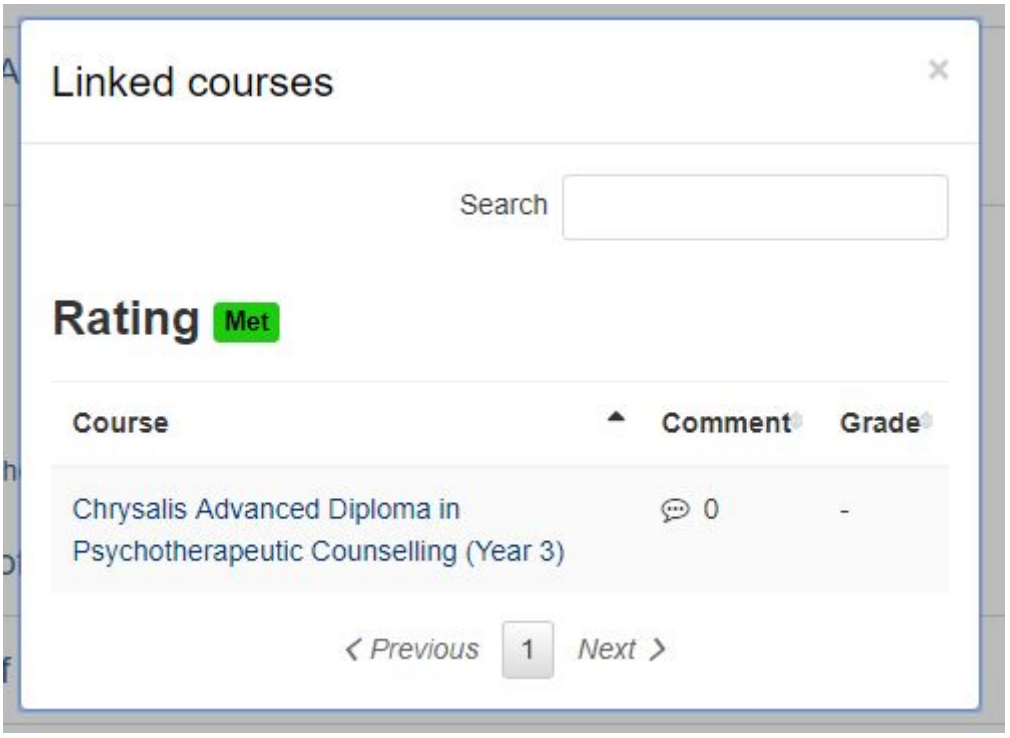
Here is a display of the total number of ratings against the number of courses where this competency is linked. Clicking on the number will present a popup containing the list of courses linked to the competency and if the course was rated or not.



Also, this block can display the evidence of prior learning. You can have more details on the list of evidence by clicking on this number to reveal links, notes and attached files. This will only display if evidence of prior learning is present.

b) Rating

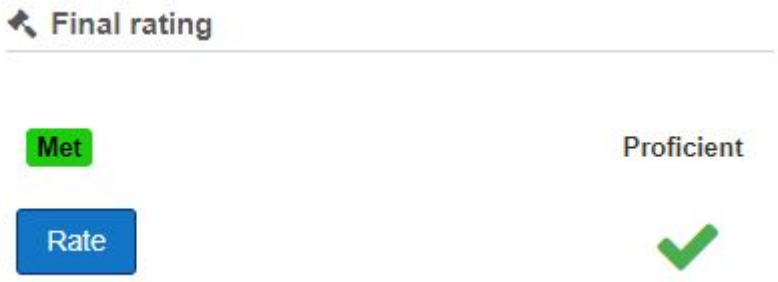
This section displays the number of rated courses by scale value. Clicking on this number triggers a popup that displays the course name, comments left by the tutor and the final course grade.



c) Final rating

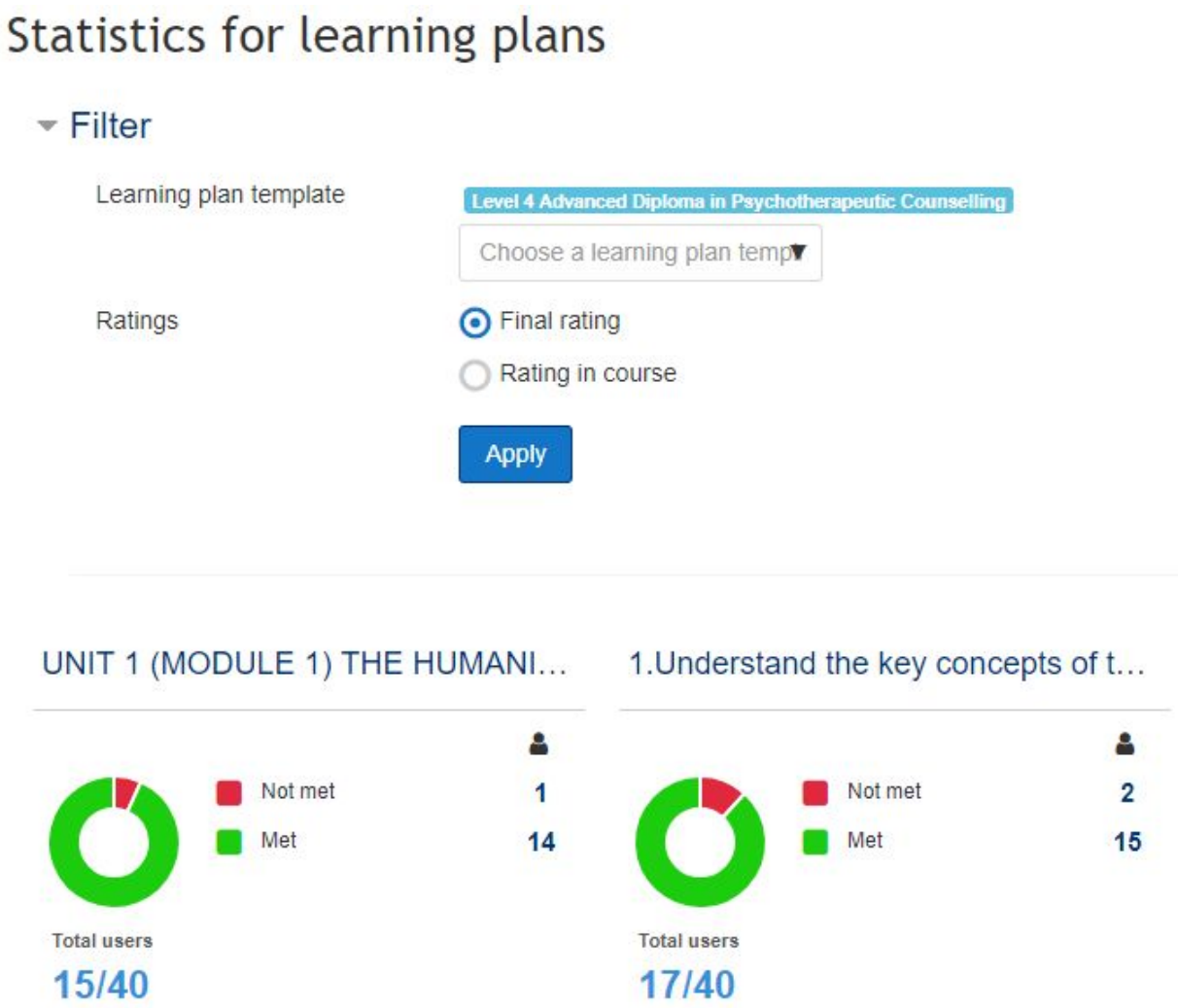
This section gives details about the final rating (rating in learning plan):

- If the competency is proficient, not proficient or not rated
- The rated scale value (if rated)
- A button to rate the competency if the user has the permission.



Learning Plan Statistics

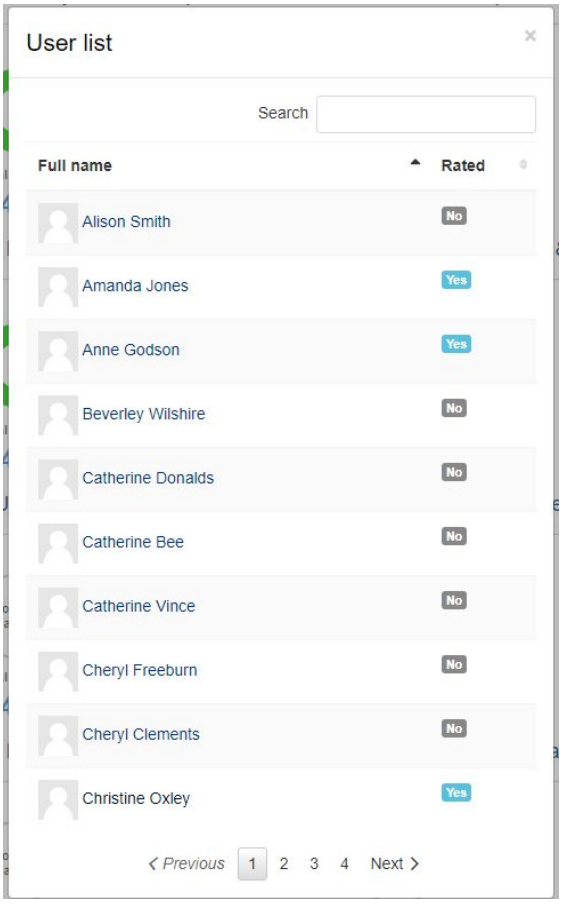
This report provides statistics for learning plans. It groups statistics by competency for a given template. For each competency it displays the total users who have learning plans and number of users by scale value. To get to this area, navigate to **Site Admin > Reports > Statistics for learning plans**.



After having selected a Learning plan template you have the option to choose to show only the ratings in the course or the final ratings given. If choosing **Final rating** you have an additional option to view lists of users against each scale rating. Clicking a competency header will display the full name and description of the competency in a popup window.

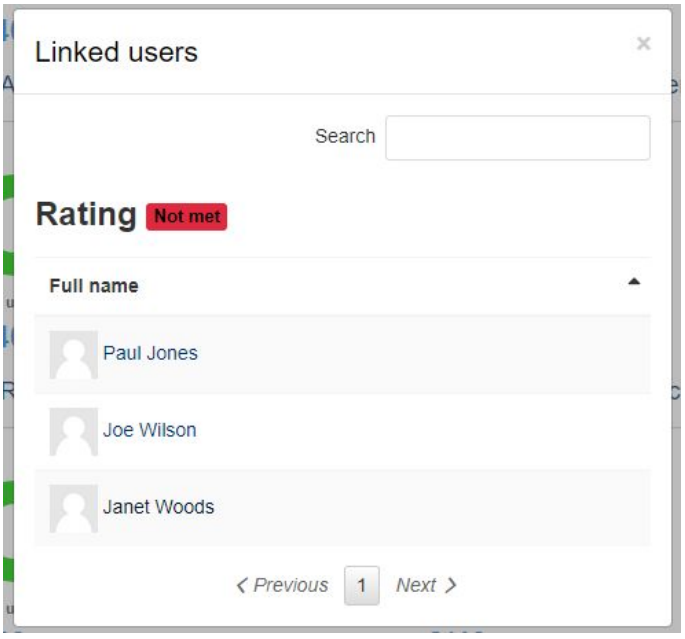
- **Total users**

Clicking on the Total users number triggers a popup with the list of all the users related to this competency. It shows if each user has been rated.



- **Number of users by scale value**

Clicking on the number of users rated with a given scale value for each competency will reveal a popup window listing the users with that selected scale rating.

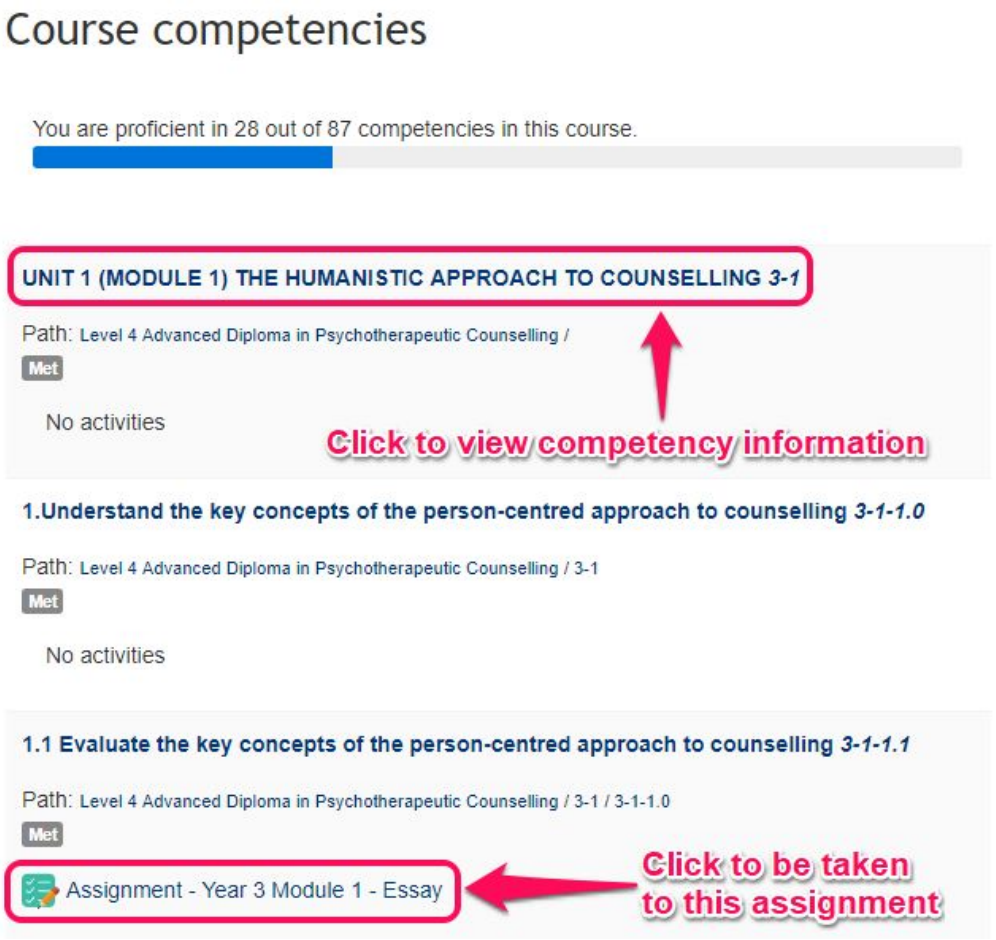


Learner Views

There are a number of ways in which learners can view their competencies, learning plans their ratings and any comments associated to them. The following sections contain screenshots of example data learners can see from different parts of the platform.

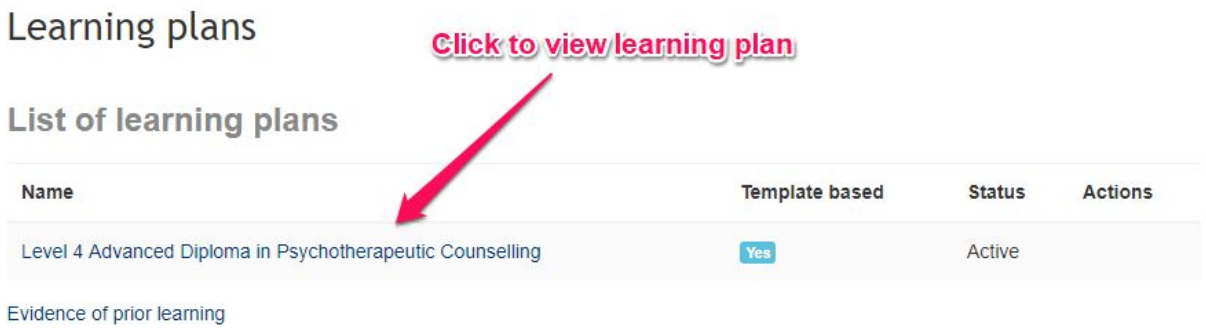
Course Competencies

From within a course, learners are able to access the competencies area in order to view their progress. This includes the ability to see how many competencies they are proficient in alongside ratings provided and links to relevant assignments for each competency.

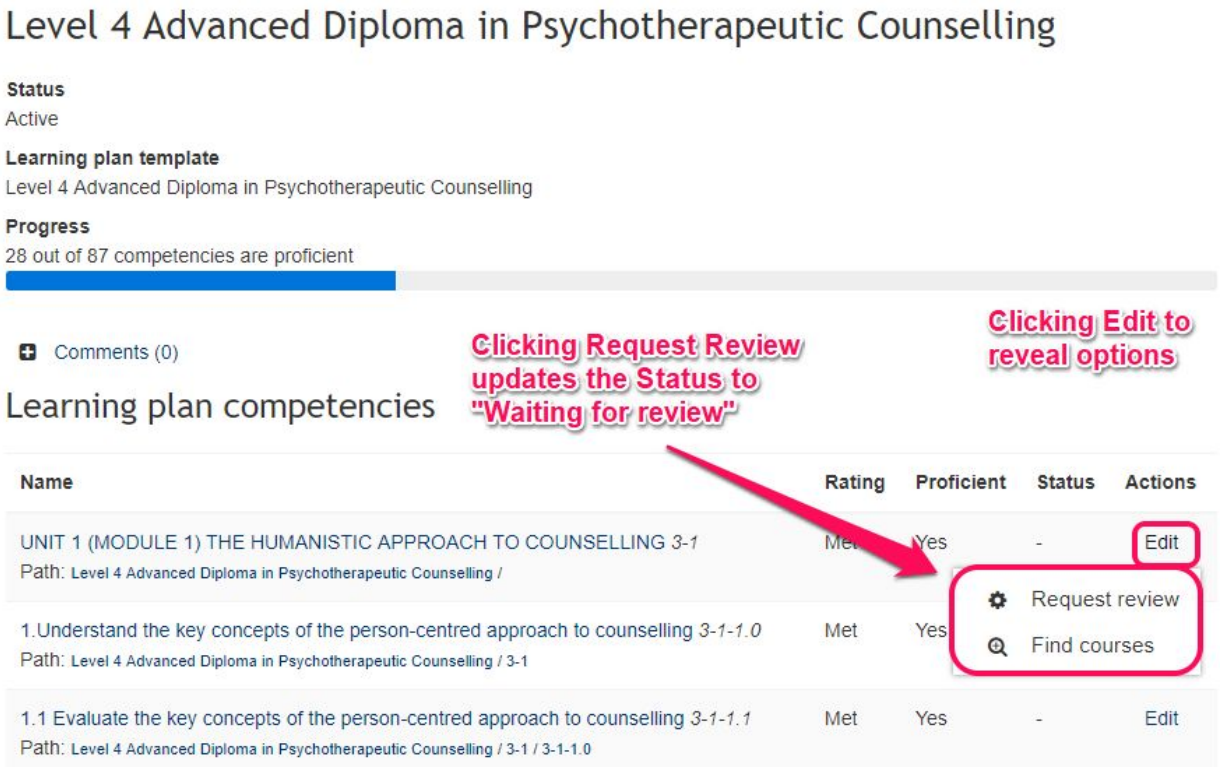


Learning Plans

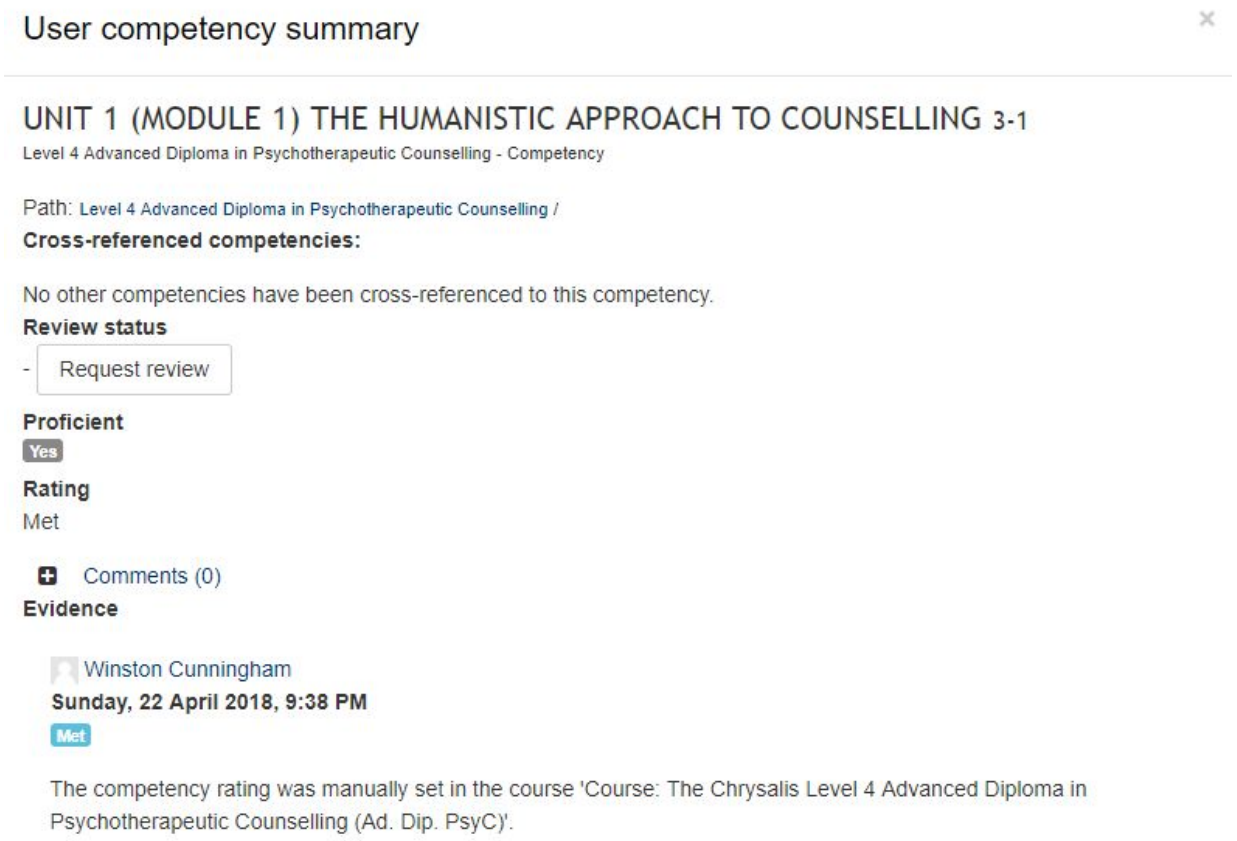
Learners who have been linked to learning plans can access these via their user profile. Any linked plans will be listed alongside their status (e.g. active or complete).



Clicking into the plan displays how many competencies that user is proficient in. It also lists every competency with the current rating, whether they are proficient and the status of the competency. Using the **Edit** button in the Actions column learners can request a review of a competency (which updates the status). If using the Learning Plans block for tutors, this request for review will be listed in their block.



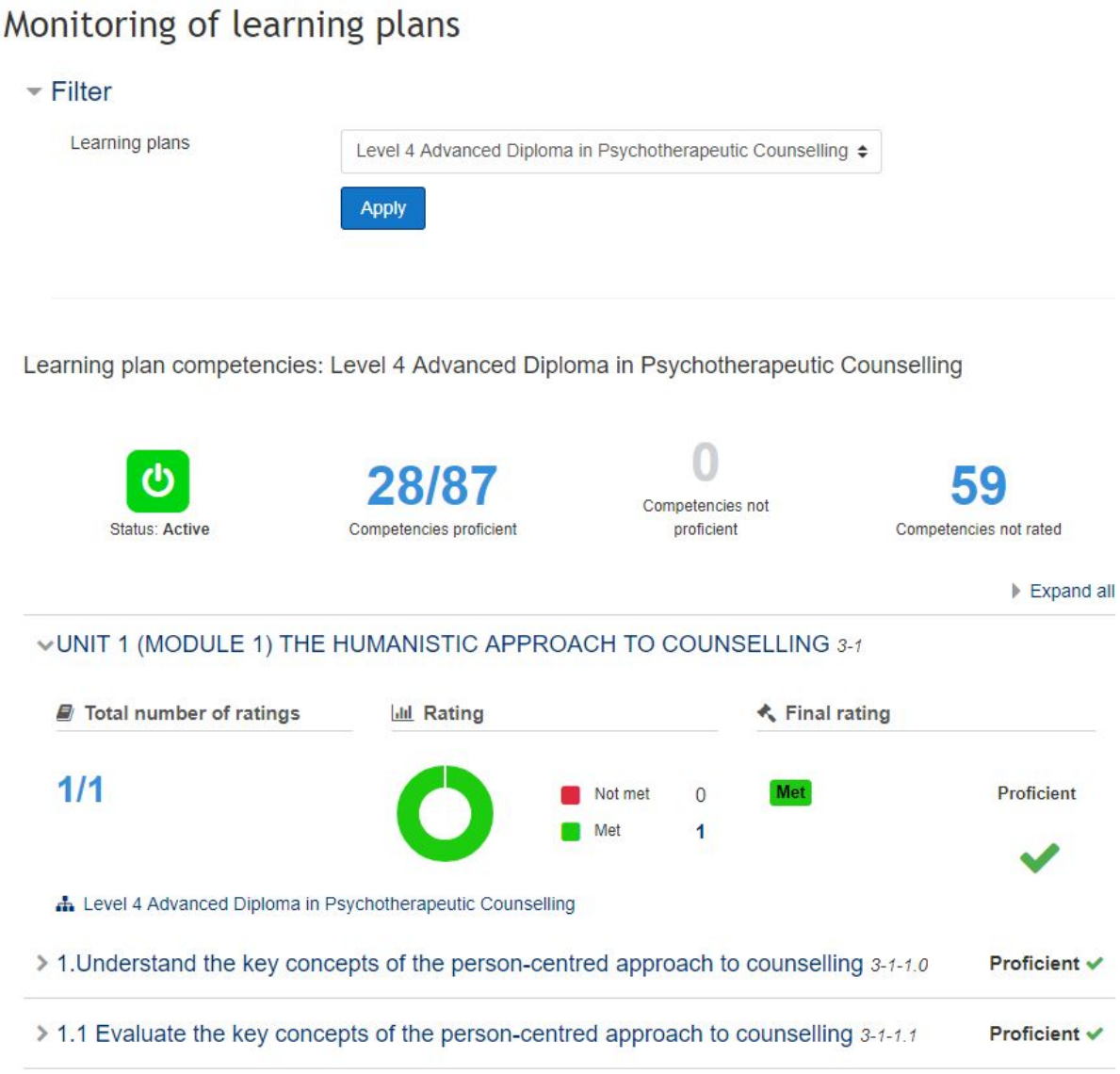
By clicking on the name of a competency the learner will be able to view more detailed information. This includes the review status of the competency, the proficient status, rating, comments left by this user or a tutor and also the evidence for each status change for this competency.



Monitor Learning Plans

If the Monitor learning plans plugin is installed then learners can access this report from their user profile. This gives the user the ability to keep track of their learning plans.

To display the report, the user must select a learning plan and click on **Apply** to view the results.



Detailed information about this learning plan and the linked competencies will be displayed. Learners can click on the rating number beside a rating status which shows list of courses the competency is linked to, the rating given from that course and also the final course grade (if applicable). The learner can expand and collapse each competency by clicking the small arrow to the left of each competency.