



Welcome to the Individual Development Portfolio

User Guide for Mentors, ITE Coordinators & University Visiting Tutors

2023-24

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1. WELCOME TO THE INDIVIDUAL DEVELOPMENT PORTFOLIO (IDP)

The Individual Development Portfolio (IDP) is an online cloud-based system which contains all the Exeter Model of Teacher Education training tools that are required by a trainee while on their school placements. By uploading and completing the Exeter Model tool templates, which are pre-programmed within the IDP, the trainee builds a file of evidence as they develop their teaching practice.

Each trainee's IDP can be accessed by all staff and mentors involved in their training, including their Lead Mentor, Reflective Mentor, ITE Coordinator, University Personal and Visiting Tutors, and staff in the Partnership Office.

Exeterpartner (the front office team in the Partnership Office) manage and advise on the functioning of the IDP so enquiries should be directed to exeterpartner@exeter.ac.uk



We'd like to encourage you to click the various links to see what they do and explore the system as much as possible. We have set up access rights so that you can only access the fields that are relevant to your role.

This is a cloud-based system with automatic back-ups.

This guide is intended to help you to navigate the IDP system to support your trainee. It doesn't include advice for specific trainee concerns.

The IDP receives a system update once per year and screen shots reflect the system from August 2023 – July 2024.

1.1 Mentor Zone resources

There are introductory videos which have been used for Induction training which are available on our Mentor Zone https://education.exeter.ac.uk/partnership/mentor_zone/welcome/

You are also able to access course documents such as programme handbooks and the Phase and profile descriptors from the Mentor Zone.

https://education.exeter.ac.uk/partnership/mentor_zone/coursehandbooksanddocuments/

Username = exeterpartner

Password = exeterpartner

Trainees also have access to the IDP videos via ELE2 on the university's intranet.

1.2 Recommended web-browsers

Our IDP provider recommends that you use Google Chrome or Microsoft Edge when accessing the IDP. If its' functioning seems especially slow, it can help to log in on different web-browsers. Older browsers such as Internet Explorer and older versions of Firefox and Safari don't work well with the IDP.

2. GETTING STARTED

2.1 Requesting a log-in link and setting up your password

Each mentor using the IDP will need an individual login to set up a username and password. We send a link to allow you to create this, which will be activated before the start of the placement. If you do not receive a link please contact us at exeterpartner@exeter.ac.uk.

You will need to provide your name and email address, your training role (such as Lead Mentor, Reflective Mentor, ITEC, UVT, etc) and the trainee you are working with so that we can ensure you are linked to the correct trainee.

You can change your password when you have accessed the system.

If you forget your password or it doesn't work, please email us at exeterpartner@exeter.ac.uk and we will send you a new link (this re-sets passwords).

We keep a list of usernames but we don't have access to your password for data security reasons.

Note for bought-in UVTs who are concurrently working in partner schools: If this circumstance applies to you, then you will have two login links – one for each role - with permissions attached accordingly. Contact us at exeterpartner@exeter.ac.uk and we will advise you.

2.2 Login errors

Should you have any issues logging into the system please email exeterpartner@exeter.ac.uk and, if possible, provide a screenshot of any error message.

If a message says that you are not web-login enabled, please email us at exeterpartner@exeter.ac.uk and we will check details and activate the account to allow you to set up your login credentials.

3. IDP DASHBOARD FOR ITECS AND UVTS


3.1 Home Screen Features

The screenshot shows the University of Exeter IDP Dashboard. At the top, there is a navigation bar with 'Home', 'Records', 'Pro Report', 'Location Preference', 'Setting', 'Student', and 'Documents'. The user is logged in as 'Admin User - ProadminUser'. The dashboard is divided into several sections:

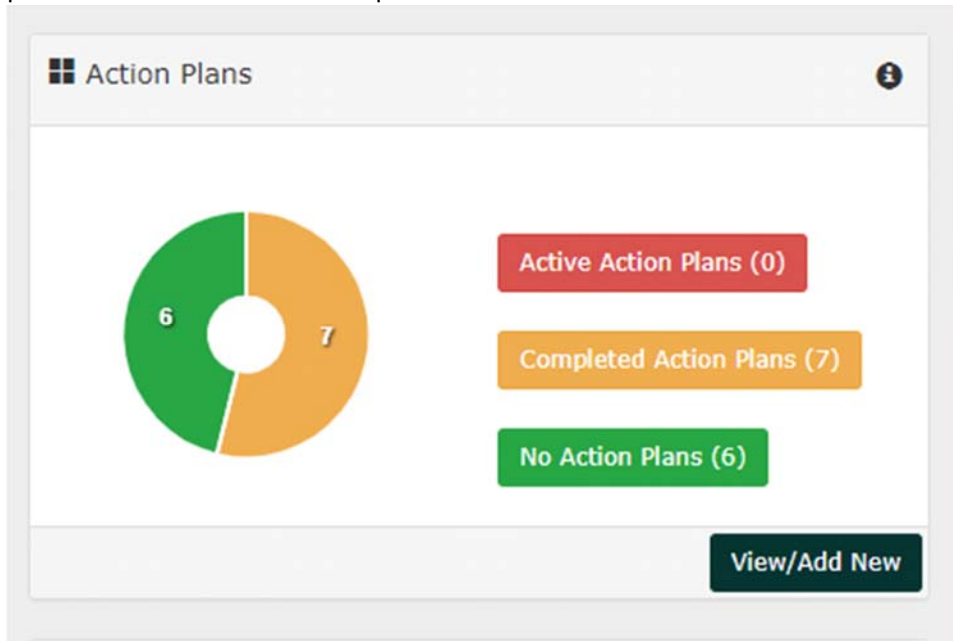
- My Trainees:** A table listing trainees (A-E) with 'View Portfolio' links.
- Recently Modified Trainee Forms:** A table listing forms for trainees A, E, B, and C.
- Main Activities of This Week:** A bar chart showing 'LoggedSessions' with a value of 1.
- Important Notifications:** A notification about successful logins and portfolio access. A white arrow points to the 'View details' link.
- Action Plans:** A donut chart showing 6 Active, 7 Completed, and 6 No Action Plans.
- Trainee Reports:** A table with columns for 'Saved Report Name' and 'Action'.

Your Home screen is a dashboard which will give you an overview of the trainees allocated to you.

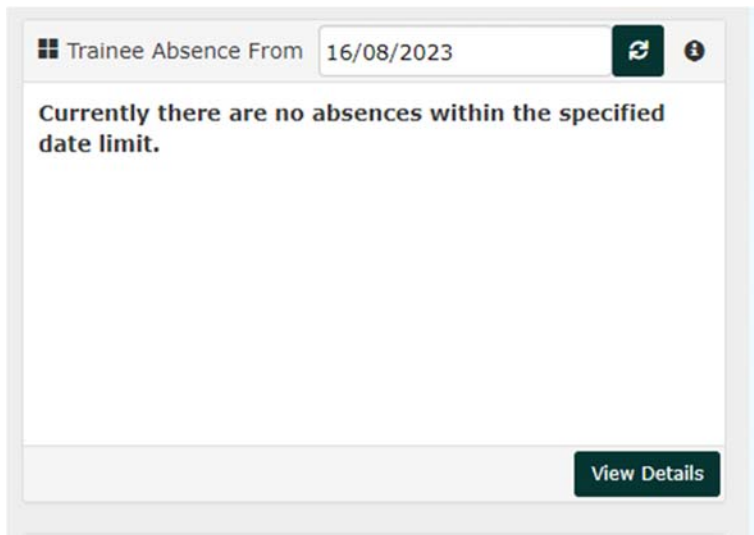
- Links to all the trainees currently allocated to you as a UVT or placed at your school if in an ITEC role ('My Trainees' box). This box includes links to your trainees where you work with them in a different role (e.g. you are also a Reflective Mentor)
- Links to forms recently modified by trainees
- A notifications screen
- The Dashboard Settings (top right hand corner) will allow you to modify the contents of your Dashboard screen

 Dashboard Settings

- A link to activate Trainee Support Plans / Cause for Concern Action Plans where required – this process will be described in Chapter 6.



Trainees are required to report their absences on the IDP (in addition to the protocols described in the Programme handbook). You are able to track trainee absences from your dashboard.



4. MENTOR ROLES AND IDP PERMISSIONS

4.1 Roles and Permissions

When we set up access to a trainee's IDP we assign you to a role - Lead Mentor, Reflective Mentor, ITE Coordinator, Personal Tutor or University Visiting Tutor.

All roles will be able to read all documents added to the timeline, but editing and submission permissions are different according to the responsibilities of that role.

The mentoring role is linked to a specific trainee. Where teachers share a role for one trainee (for example, two part-time Lead Mentors) we need to know the name of both mentors and the trainee that they are attached to.



You can be assigned to more than one role during a training placement (for example, you might be both a Reflective Mentor and an ITE Coordinator for the same trainee). It is important to access the trainee's IDP using the hyperlink for the correct role.

Staffing plans frequently change for many reasons. If teachers switch to different roles please contact exeterpartner@exeter.ac.uk and we can ensure that the mentor is attached to the correct role and trainee.

4.2 Lead Mentor permissions

The Lead Mentor is responsible for in-class practice, and therefore in the IDP they need access to Weekly Development Meetings, FRAPs, and they can initiate a Trainee Support Plan/Cause for Concern Letter Plans.

4.3 Reflective Mentor permissions

There are three Reflective Conversations during a placement. Reflective Mentors have to access the Reflective Conversations so that they can agree that a meeting has taken place and sign off the form. They don't have editing permissions for the Weekly Development Meetings, FRAPs, Actions Plans, etc.

4.4 ITEC permissions

ITECs primarily have a Quality Assurance role and are responsible for signing off and submitting the FRAPs and Final Summative Report. It is therefore really important that they don't share their login with anyone else. ITECs may be involved with Action Plans so will have editing rights for this.

Permissions are set up to ensure that only the ITEC can submit FRAPs. A trainee cannot submit a FRAP on behalf of the ITEC.

4.5 UVT Permissions

UVTs can upload and edit the UVT Visit Record Form and Lesson Observation and they can initiate and edit Action Plans such as a Trainee Support Plan or Cause for Concern.

4.6 If there are document access problems



If you see this no entry sign when you try to type into a field, you don't have the correct permissions for that document. If you are certain that you are using the correct link for the correct role but still get this sign, please contact exeterpartner@exeter.ac.uk for advice.

(If you see this sign when editing a TSP or CFC Action Plan, please see section 6 for help and guidance)




Sometimes UVTs, mentors and trainees like to work on the IDP together using the trainee's login. This is understandable and sometimes time-saving, especially if the trainee is adding Exeter Model tools to the timeline, which only they can do.

But it's important to remember that a trainee will have a different set of document permissions and therefore some forms will need to be completed when logged in as the mentor/tutor.

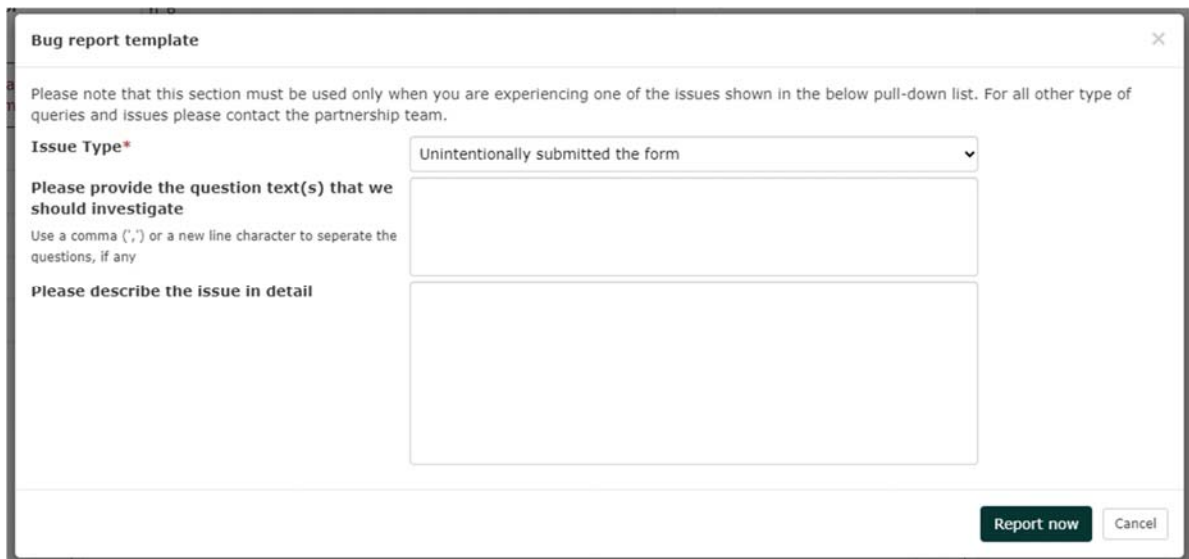
Report a Problem

There is a link at the foot of templates where you can report a problem directly to us. It will usually be used by trainees if there is a problem with the templates on their timeline.

[Report a problem](#) 

Press 'Report a problem' which will take you to the following screen.

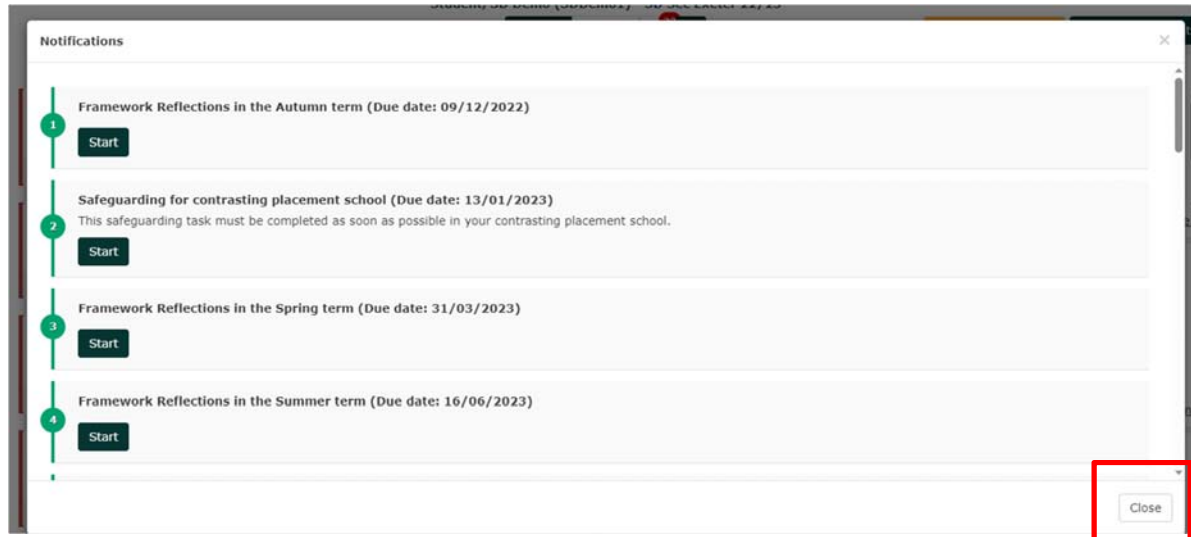
There are five drop down options which will let us know the nature of the problem. This can be particularly helpful if the form has been submitted before intended and you need the template unlocked.



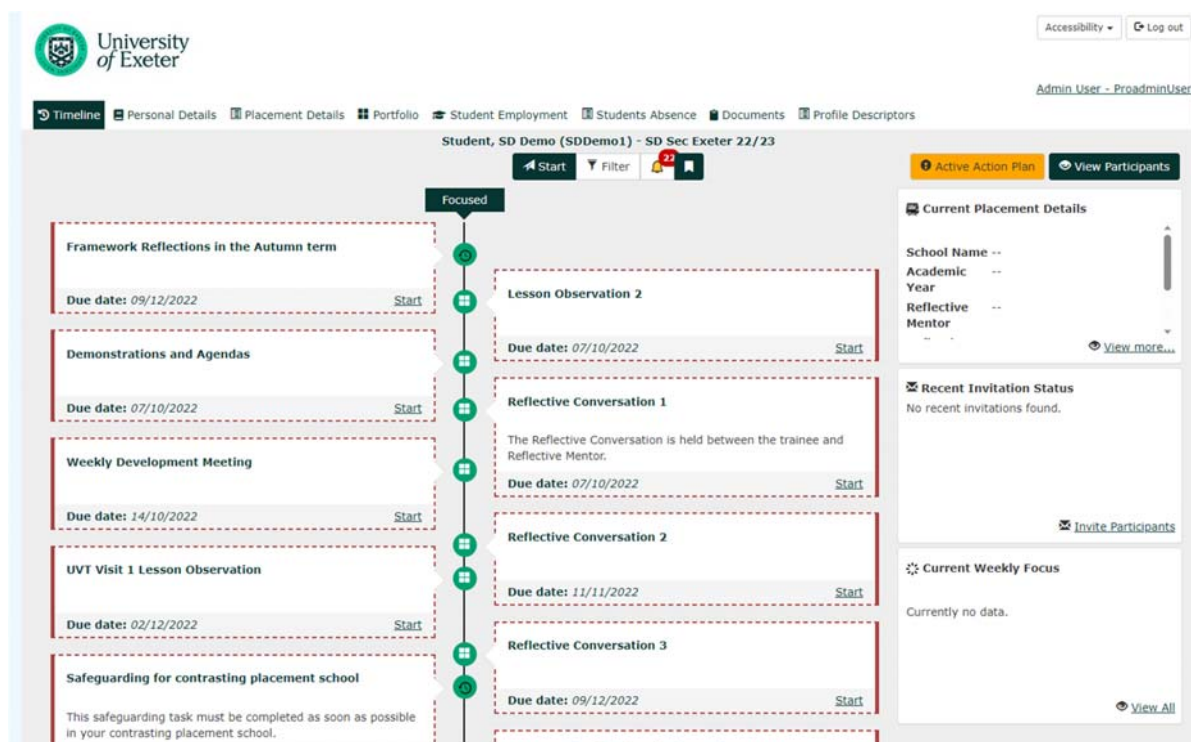
5. TRAINEE IDP FEATURES

5.1 The trainee timeline

The 'View Portfolio' link on your dashboard will take you to the trainee's IDP.



The timeline is displayed as follows:



5.2 Features on the timeline

- The trainee will click start on each activity link to activate a document on the timeline. As the trainee uses the timeline and works on documents, this link will change to reflect the next action, such as 'continue'.
- Documents will show as 'incomplete' or 'complete'. Incomplete tasks are highlighted by the orange notifications bell.
- Our Demo Student has an active Action Plan, shown by the Orange alert box. This box will not appear if there is no current action plan. This feature is to alert all mentors and the UVT to monitor progress on the action plan. (See Chapter 6 for further details).

- This start button enables trainees and UVTs to add scheduled and unscheduled Exeter Model documents to the timeline which have not already been programmed.
- The documents show the due dates for completion. Scheduled and compliance tasks such as FRAPs and Safeguarding and Induction must not be submitted later than this date.

5.3 Who uploads templates to the timeline, and when?

Exeterpartner uploads the major assessment and compliance templates on the timeline. These are **scheduled items** including FRAPs, UVT reports, Induction and Safeguarding tasks, EPS Framework tasks, etc. The deadlines for completion are included on the tasks. We add new tasks onto the timeline just before the start of the next phase.

The trainee is responsible for adding the ‘unscheduled’ Exeter Model tools and all all required supporting evidence materials onto their timeline. A list of all scheduled and unscheduled items can be found in [Appendix 1](#).

To reinforce to the trainee the sequence of Exeter Model tools to use during school-based work, and as a practical assistance to help them to get used to uploading items, Exeterpartner uploads two weeks of unscheduled templates as follows:

Autumn Term Week 1 of placement	Autumn Term Week 2 of placement
1 x Lesson/Episode Observation 1 x Agenda 1 x Weekly Development Meeting	2 x Lesson/Episode Observation 2 x Agenda 1 x Weekly Development Meeting

It is really important to emphasize that the **trainee is responsible for their IDP**. They must use it regularly and ensure the timely uploading of Exeter Model tools onto their IDP in accordance with phase expectations.

5.4 Trainee Uploaded Documents & paper copies

Exeterpartner adds all training documents and supporting guidance to the trainee’s IDP. They have a folder of guidance documents for their use, which is visible to mentors and UVTs.

Trainees can upload scanned paper copies of templates such as the Lesson/Episode Observation, which may sometimes be the only practical way to record their learning.

Most trainee uploaded items will be the unscheduled Exeter Model tools as well as Assignment Feedback.

Trainees can re-name unscheduled documents to ensure clarity. Where a document title can be edited, this is shown with the blue pencil as below.



There is guidance in [Appendix 2](#) on suggested naming conventions.

5.5 Current Placement details

The trainee timeline screen also shows the Current Placement details for the trainee. You can see the full record if you press the 'View participants' link in that box which opens a full screen with school and mentor details. You can also find the contact name and email address for the University Visiting Tutor here.



If any of the school or mentor details are incorrect we will always be happy to update these. Please contact us at exeterpartner@exeter.ac.uk if you need amendments to be made.

5.6 Portfolio tab – overview of active documents on a trainee timeline

Title [^]	RefNo	Date Entered	Completion Phase	Instance mode	Last Modified	Overall completion	Actions
Lesson Observation Form	ADRCP	21/06/2023	Complete	Unscheduled	27/06/2023 15:15:52	50%	Click -
Weekly Development Meeting Record - Developing Independence	ADQSQ	19/06/2023	Complete	Unscheduled	27/06/2023 15:16:11	100%	Click -
PGCE to Early Career Framework Transition Document 2023	ADQFE	16/06/2023	Complete	Scheduled	28/06/2023 10:30:37	100%	Click -
Reflective Conversation 5	ADQEZ	16/06/2023	Complete	Scheduled	16/06/2023 09:10:00	100%	Click -
Lesson Observation Form	ADQFB	15/06/2023	Complete	Unscheduled	16/06/2023 08:41:18	50%	Click -
Demonstration and Agenda Form	ADPOP	12/06/2023	Complete	Unscheduled	16/06/2023 08:33:13	25%	Click -
Final Summative Report (FSR)	ADPFL	09/06/2023	Complete	Scheduled	12/06/2023 15:08:19	100%	Click -
Framework and EPS tasks for the Summer Term	ADPGS	09/06/2023	Complete	Unscheduled	28/06/2023 09:25:48	100%	Click -
Lesson Observation Form	ADPFK	08/06/2023	Complete	Unscheduled	09/06/2023 14:59:07	50%	Click -
Lesson Observation Form	ADPFF	08/06/2023	Complete	Unscheduled	09/06/2023 14:57:32	50%	Click -
Agenda Form	ADPFJ	07/06/2023	Complete	Unscheduled	09/06/2023 10:53:02	25%	Click -
Summative Assignment 2 & Feedback	ADOQG	06/06/2023	Complete	Scheduled	09/06/2023 09:29:10	100%	Click -
Weekly Development Meeting Record - Developing Independence	ADPEQ	05/06/2023	Complete	Unscheduled	28/06/2023 18:42:09	100%	Click -

The Portfolio tab shows a list of all the documents that a trainee has uploaded to their timeline, arranged by date order. This can be very helpful in gaining an overview of the IDP, especially later in the year when the IDP will have a lot of content as shown in this example at the end of the PGCE Secondary course.

You can filter the list by clicking on the document types shown in the left-hand box, e.g:

- Exeter Model Training Tools (such as Framework tasks)
- Assessment (such as FRAPs)
- Trainee uploaded documents
- Learning Conversations (such as Reflective Conversations)
- Supporting Trainees (such as TSP/CFC Action Plans)

5.7 Ensuring that a document is completed and submitted

In the Portfolio tab list, you will see that documents are shown as being either incomplete or complete. When a document is submitted it will move from incomplete to complete.

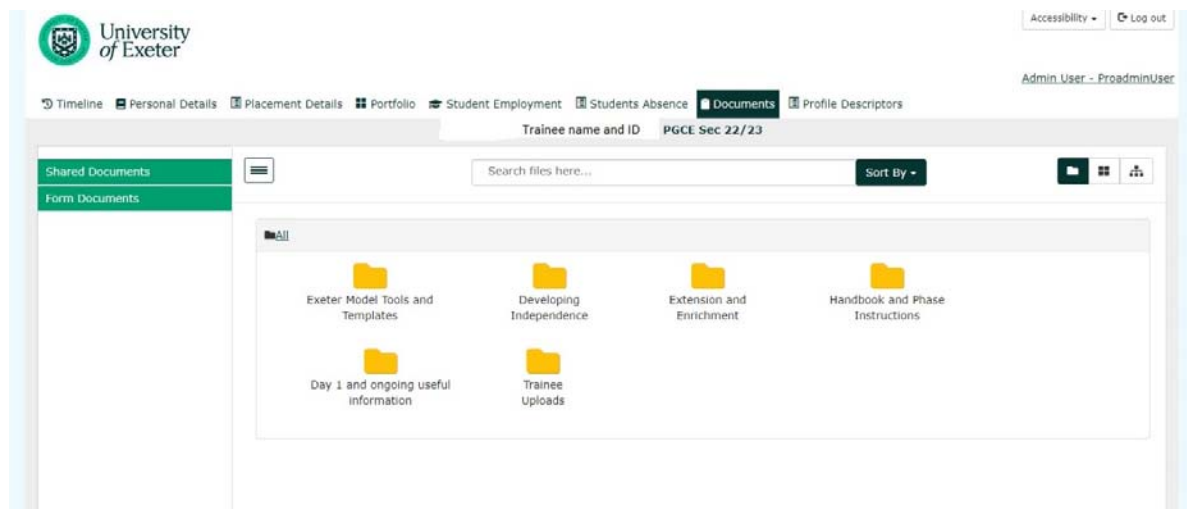
Submit Button

It is really important to remember to press the 'submit' button to complete an item, especially for assessed documents such as FRAPs.

Signing off a document does not complete it, the document must then be submitted.

You will not be able to amend an item once it is in 'complete' mode. If you need to make an amendment please contact exeterpartner@exeter.ac.uk and we can return it to editing mode for you.

5.8 Course Documents



Trainees can access course documents and pro formas from the Documents tab on their IDP. These documents are available to download and print as required.

6. SETTING UP ACTION PLANS

Action Plans are set up by the Lead Mentor and/or the ITEC, and the University Visiting Tutor/Personal Tutor.

Guidance on discussions between the Lead Mentor, ITEC, UVT and Partnership Office for setting up action plans can be found in the Programme Handbooks, in the Mentor Zone and via the Partnership Relations Managers – exeterpartner@exeter.ac.uk.

There are two types of Action Plan that can be raised:

- Trainee Support Plan
- Cause for Concern Action Plan

We only allow a single Action Plan to be in place at any one time. The ONLY exception is if a trainee has an Action Plan plus a separate Support Plan for Fundamental English or Maths skills (only issued by the relevant university subject leader).

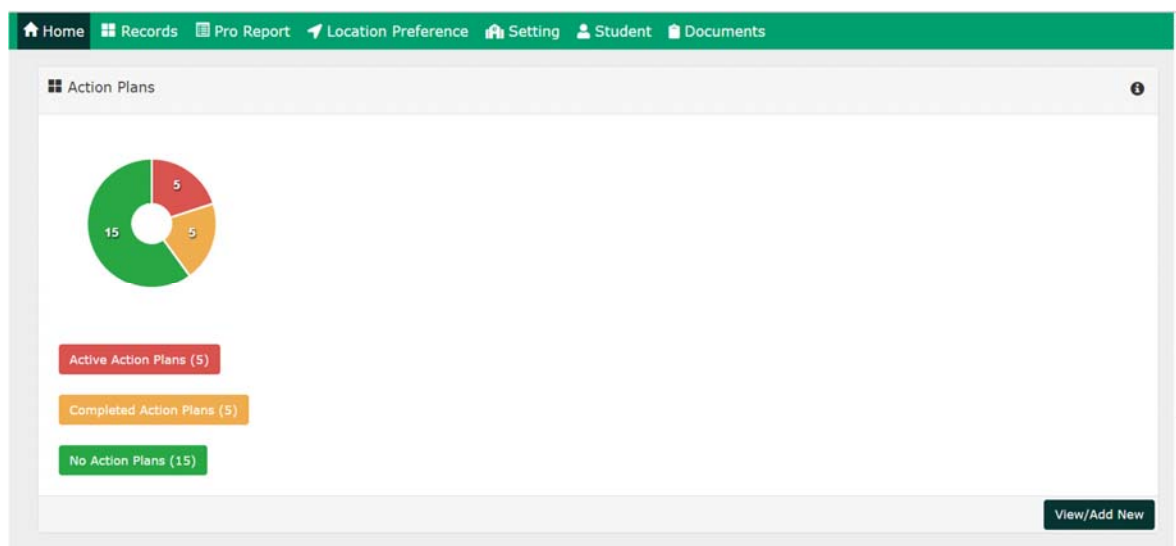
Therefore, please ensure that the previous action plan is complete before attempting to add a new one.

6.1 Locating the Action Plan Dialogue Box on your Dashboard

Action Plans are launched from the dashboard by Lead Mentors, ITECs, UVTs (or Partnership Office if assistance is needed).

You will need to scroll down your dashboard screen to see the 'Action Plan' area.

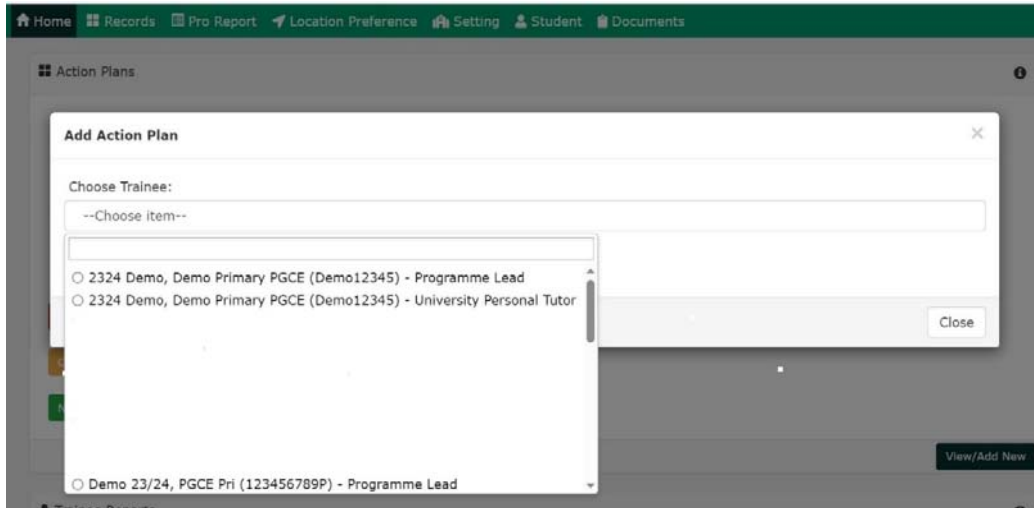
To start the Action Plan process – click View/Add New tab as shown below.



6.2 Setting up the Action Plan details for a trainee

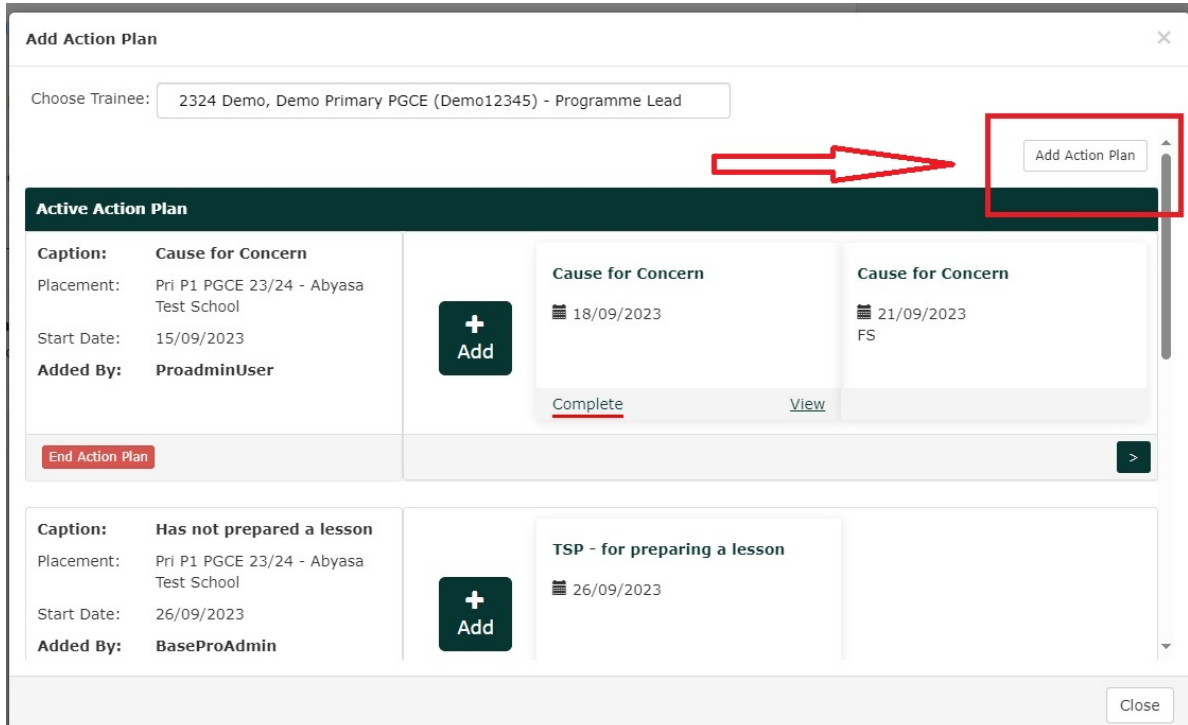
Select the name of the trainee from your drop-down list, ensuring that you chose the link that is correct for your role. Click on the link and it will add the trainee name into the dialogue box

(In this example our trainee is called Demo12345 and your role is listed beside the trainee name)



The next screen shows any TSPs or CFCs that have previously been issued for a trainee.

To start a new CFC, first click the 'Add Action Plan' box (shown highlighted with an arrow)



Add details to the template as follows. The box for 'Title' is a free-text box and we suggest that you type in the type of Action Plan as well as a very brief title

Add Action Plan ✕

Choose a start date and the type of Action Plan (mandatory) to initiate it for the selected student. ?

After entering the details, please click on the 'Save' button. For more details, please refer the right-hand side panel.

Trainee Name	2324 Demo, Demo Primary PGCE (Demo12345) - PGCE Pri 23/24
Title	Cause for Concern : Absence >10 days
Type of Action Plan	CFC
Placement	Pri P1 PGCE 23/24 - Abyasa Test S...
Start Date	13/09/2023

← Back to main view Save

Close



Press Save

This will now open the next 'Add Action Plan' screen, including any TSP/CFCs that may have been



previously issued. Scroll down the page to find the correct Action Plan and press +Add

Incomplete View

End Action Plan <

Caption: Cause for Concern : Absence >10 days	
Placement: Pri P1 PGCE 23/24 - Abyasa Test School	
Start Date: 13/09/2023	
Added By: ProadminUser	

End Action Plan

Caption: Has not prepared a lesson	TSP - for preparing a lesson
Placement: Pri P1 PGCE 23/24 - Abyasa Test School	
Start Date: 26/09/2023	26/09/2023

Close


6.3 Choosing the type of action plan and its duration

This example will show a Cause for Concern but you use the same process for a Trainee Support Plan.

Under the heading 'Title', details are pre-filled, but this is a free text box and the title can be amended.

Choose the template that applies – this example uses the 23/24 Cause for Concern

Add Action Plan ✕

Please add a form item for the selected trainee by choosing a template and date fields.
After entering the details, please click on the 'Save' button. For more details, please refer the right-hand side panel. 

Trainee Name 2324 Demo, Demo Primary PGCE
(Demo12345) - PGCE Pri 23/24

Title Cause for Concern : Absence >10 days

Choose Template --Choose Item--

Make this item available from

Due date for the item

Date from when to show this on timeline

Display Text

23/24 Cause for Concern
 23/24 Trainee Support Plan
 23/24 Fundamental Maths Action Plan
 23/24 Fundamental English Action Plan

IMPORTANT: ITECs, Mentors and UVTs should only choose the Cause for Concern or the Trainee Support Plan. (The templates for Fundamental English and Maths are only used by university Subject Leaders with responsibility for these specific action plans).

Add Action Plan

Please add a form item for the selected trainee by choosing a template and date fields.



After entering the details, please click on the 'Save' button. For more details, please refer the right-hand side panel.

Trainee Name	2324 Demo, Demo Primary PGCE (Demo12345) - PGCE Pri 23/24
Title	<input type="text" value="Cause for Concern"/>
Choose Template	<input type="text" value="23/24 Cause for Concern"/>
Make this item available from	<input type="text" value="13/09/2023"/>
Due date for the item	<input type="text" value=""/>
Date from when to show this on timeline	<input type="text" value=""/>
Display Text	<input type="text" value=""/>

< September 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Add Action Plan

Please add a form item for the selected trainee by choosing a template and date fields.



After entering the details, please click on the 'Save' button. For more details, please refer the right-hand side panel.

Trainee Name	2324 Demo, Demo Primary PGCE (Demo12345) - PGCE Pri 23/24
Title	<input type="text" value="Cause for Concern"/>
Choose Template	<input type="text" value="23/24 Cause for Concern"/>
Make this item available from	<input type="text" value="13/09/2023"/>
Due date for the item	<input type="text" value="27/09/2023"/>
Date from when to show this on timeline	<input type="text" value="13/09/2023"/>
Display Text	<input type="text" value="CFC following more than 10 days absence"/>



Make this item available from: You should ideally add in today's date and issue the Action Plan as soon as possible.

Due date for the item: This will usually be set for a maximum of 10 working days from the date of issue

Date from when to show this on the timeline: You should add in today's date.

Display Text: this is a free-text box and should include a very brief description.

Press Save.

This will return to the 'Add Action Plan' screen. Scroll down the page to find the correct Action Plan and press 'Add'



Add in the date field (today's date) and add the Date of Issue. Press Save and Continue.

Cause for Concern

Caption	<input type="text" value="Cause for Concern"/>
Date	<input type="text" value="13/09/2023"/>
Link to a placement	Pri P1 PGCE 23/24 - Abyasa Test School -Additional UVT: White, Harriet -Reflective Mentor: Wood, Anita
Date of Issue:	<input type="text" value="13/09/2023"/>

Last updated: --

6.4 Writing Action Plan Targets

Once you have completed the steps in 6.3, you can now write the action plan as follows:

Select the reason for the reason for issuing the CFC from the four options below, and give a brief description of the reason in the free-text box. Press Next.

Cause for Concern (✎)

This record is in **Incomplete phase** with 21 key questions unanswered. Go Back ▾

Date Last updated: 05/10/2023 02:57

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue: Last updated: --

Reason for CFC

CFC Meeting Details

Trainee Reflection

Guidance for Setting Targets

Action Plan

How to Achieve the Targets?

Signature

Review

Submit

Cause for Concern on Progress towards the Teachers' Standards (for QTS)
 This form is initiated to signal our concern about your present progress on the PGCE programme, and to support you in addressing identified needs. Our concern is due to the following:

Absence of more than 10 days from the programme
 Failure to meet deadlines for university directed tasks or assignments
 Insufficient progress for this stage of the course Professional engagement with the course
Last updated: Sep 18, 2023 at 1:57PM

Description of the reason/s for issuing the Cause for Concern (Lead Mentor to complete if school based work, university tutor if during taught course):

Black ▾ **B** *I* U

Support to return to placement after illness ...

Last updated: Sep 18, 2023 at 1:58PM

Next >>

Complete details for a CFC meeting between the trainee, UVT or Lead Mentor as appropriate

Cause for Concern (✎)

This record is in **Incomplete phase** with 21 key questions unanswered. Go Back ▾

Date Last updated: 05/10/2023 02:57

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue: Last updated: --

Reason for CFC

CFC Meeting Details

Trainee Reflection

Guidance for Setting Targets

Action Plan

How to Achieve the Targets?

Signature

Review

Submit

An Action Plan will now be drawn up between you, your university tutor and your Lead Mentor (if during school based work) in order to identify what action you should take to strengthen your position. A meeting will be arranged to enable you to discuss the action plan.
 Please provide the meeting details below:

Date and time:

Last updated: Sep 18, 2023 at 2:00PM

Meeting will be with:
 (Lead Mentor if in school, university tutor if on taught course)

Last updated: Sep 18, 2023 at 2:00PM

Alternatively, a CFC action plan may be drafted during a UVT visit.

<< Prev **Next >>**

Last Modified By: Administrator on 05/10/2023 14:57

The trainee will write their reflection and identify targets or support needed to address the Cause for Concern. This must be written in preparation for their CFC meeting, with reference to the Guidance to Setting Targets. Press Next

23/24 Demo, Demo Primary PGCE (Demo12345) - PGCE P1 23/24

Cause for Concern (✎)

This record is in **Incomplete phase** with 21 key questions unanswered. Go Back ▾

Date

Last updated: 05/10/2023 02:57

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue:

Last updated: --

Reason for CFC	<p>Action for trainee - you should complete the following and bring it to your meeting.</p> <p>Trainee Reflection on the current situation and why the Cause for Concern is being issued</p> <p>Black ▾ B <i>I</i> <u>U</u> </p> <p>Trainee will write their reflection here at the start of the process</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p><small>Last updated: Sep 18, 2023 at 2:03PM</small></p> <p>Are there any targets or support that might be helpful to enable you to make progress?</p> <p>Black ▾ B <i>I</i> <u>U</u> </p> <p>Trainee will identify required support here</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> <p style="text-align: center;"><< Prev Next >></p>
CFC Meeting Details	
Trainee Reflection	
Guidance for Setting Targets	
Action Plan	
How to Achieve the Targets?	
Signature	
Review	
Submit	

23/24 Demo, Demo Primary PGCE (Demo12345) - PGCE P1 23/24

Cause for Concern (✎)

This record is in **Incomplete phase** with 21 key questions unanswered. Go Back ▾

Date

Last updated: 05/10/2023 02:57

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue:

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Reason for CFC	<p>Focus: Addressing Issues arising from a Cause for Concern</p> <p>Please make sure you list all areas which the trainee needs to address in order to meet the QTS Standards.</p> <p>Targets should be SMART (Specific, Measurable, Achievable, Realistic, Time-Related)</p> <p>These targets should be discussed, and progress recorded, at the Weekly Development Meeting.</p> <p>2-week action plan completed by Lead Mentor (or Personal Tutor if during the taught course) and UVT. This should be completed and agreed upon by both.</p> <p>Please link to the specific Profile Descriptor when entering the targets in the next section.</p> <p>If targets are not met by the specified date, please contact the UVT and jointly issue a new CFC and Action Plan with further support specified.</p> <p>You will have to initiate another Cause For Concern form for the trainee.</p> <p>During the Consolidating Practice and Developing Independence phases please remember that, if appropriate and to minimise the negative impact on pupil learning, the Lead Mentor and UVT can agree that the trainee should return to teaching episodes in some lessons.</p> <p>If this is the case the Action Plan must detail what needs to be evidenced in order to continue to make progress/return to full lessons.</p> <p style="text-align: center;"><< Prev Next >></p>
CFC Meeting Details	
Trainee Reflection	
Guidance for Setting Targets	
Action Plan	
How to Achieve the Targets?	
Signature	
Review	
Submit	

Press Next to move to the Action Plan tab

The Lead Mentor or ITEC or UVT will now write the targets.

- In the boxes under the 'Targets' column, write a brief description of each specific target.
- Add the date to be completed in the next column
- The form allows for 6 targets to be identified.
- Dates for completion should be set not later than 10 working days from the issue of the Action Plan.

At this stage you will not be able to amend the columns 'Has the trainee met the target?' or 'Dates when the targets are met'.

Cause for Concern

This record is in **Incomplete phase** with **21** key questions unanswered.

Go Back ▾

Date

Last updated: 05/10/2023 02:57

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue:

Last updated: --

s.no.	Targets	Date to be completed	Has the trainee met the target? <small>If not please issue another Cause for Concern.</small>	Date of when the targets are met <small>If the target is not met, please do not select a date</small>
Target 1	<input type="text" value="Define target 1 here"/> <small>Saved: Sep 18, 2023 at 2:07PM</small>	<input type="text" value="27/09/202"/> <small>Saved: Sep 18, 2023 at 2:05PM</small>	--Choose item-- ▾ <small>Last updated: Just now</small>	<input type="text" value=""/> <small>Last updated: Just now</small>
Target 2	<input type="text" value="Define target 2 here"/> <small>Saved: Sep 18, 2023 at 2:07PM</small>	<input type="text" value="27/09/202"/> <small>Saved: Sep 18, 2023 at 2:07PM</small>	--Choose item-- ▾ <small>Last updated: Just now</small>	<input type="text" value=""/> <small>Last updated: Just now</small>
Target 3	<input type="text" value=""/> <small>Saved: --</small>	<input type="text" value=""/> <small>Saved: --</small>	--Choose item-- ▾ <small>Saved: --</small>	<input type="text" value=""/> <small>Saved: --</small>
Target 4	<input type="text" value=""/> <small>Saved: --</small>	<input type="text" value=""/> <small>Saved: --</small>	--Choose item-- ▾ <small>Saved: --</small>	<input type="text" value=""/> <small>Saved: --</small>
Target	<input type="text" value=""/> <small>Saved: --</small>	<input type="text" value=""/> <small>Saved: --</small>	--Choose item-- ▾ <small>Saved: --</small>	<input type="text" value=""/> <small>Saved: --</small>

<< Prev
Next >>

Reason for CFC

CFC Meeting Details

Trainee Reflection

Guidance for Setting Targets

Action Plan

How to Achieve the Targets?

Signature

Review

Submit

Press Next to move to the next tab 'How to Achieve the Targets'. This is written during the meeting with the trainee. (When you are typing you may find that text boxes have a red background. Click away, the system will save the text and turn the background green).

Cause for Concern (🔍)

This record is in **Incomplete phase** with 21 key questions unanswered. Go Back

Date: 13/09/2023
Last updated: 05/10/2023 02:57

Link to a placement: Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue: 13/09/2023
Last updated: --

Reason for CFC: Support
Please include detail of what training/support is going to be put in place to provide opportunity for the trainee to meet the targets.

CFC Meeting Details: Support will be identified here

Trainee Reflection:

Guidance for Setting Targets:

Action Plan:

How to Achieve the Targets?
Last updated: Sep 18, 2023 at 2:08PM
How will you know when the target has been achieved? How will it be measured?
The trainee will know that the target has been achieved because ...

<< Prev Next >>

Press Next to move to the signature page.

The signatures and dates are added at the end of the meeting with the trainee. This is to ensure that the trainee understands the reasons for issuing a CFC and has participated in writing the Action Plan.

Cause for Concern (🔍)

This record is in **Incomplete phase** with 21 key questions unanswered. Go Back

Date: 13/09/2023
Last updated: 05/10/2023 02:57

Link to a placement: Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue: 13/09/2023
Last updated: --

Reason for CFC: Please ensure that all the key questions are answered and the below roles have signed before you click on the 'Submit' button in the next section.

CFC Meeting Details:

Trainee Reflection:

Guidance for Setting Targets:

Action Plan:

How to Achieve the Targets?

Signature:

Lead Mentor Signature: Yes No
14/09/2023
Last updated: Just now

University Visiting/Personal Tutor: Yes No
14/09/2023
Last updated: Just now

Trainee: I am aware of the CFC issued and participated in writing the Action Plan: Yes No
14/09/2023
Last updated: Just now

<< Prev Next >>

Go straight to the 'Submit' page (click past the 'Review' page which will not be available to you at this stage).

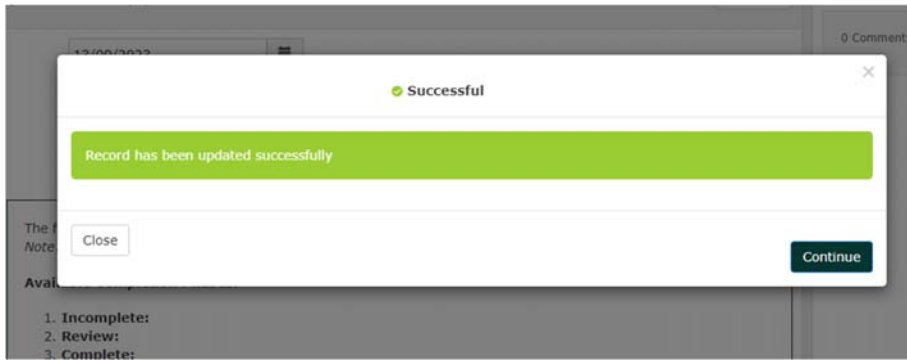
The screenshot shows a web form titled "Cause for Concern" with a status of "Incomplete phase with 21 key questions unanswered." The form includes fields for "Date" (13/09/2023) and "Date of Issue" (13/09/2023). A sidebar on the left contains a menu with items: Reason for CFC, CFC Meeting Details, Trainee Reflection, Guidance for Setting Targets, Action Plan, How to Achieve the Targets?, Signature, Review, and Submit. The main content area contains a message: "The form is currently in **Incomplete** phase and clicking on the Submit button will update it to **Review**. Note: The edit permission may change after you submit the form." Below this is a section titled "Available Completion Phases:" with a list: 1. Incomplete, 2. Review, 3. Complete. A link "here" is provided for updating the form for other trainees. At the bottom, there are "<< Prev" and "Submit" buttons.

Press submit once. You will be asked to confirm that you wish to change the completion phase and edit permissions. Press Yes.

This action will complete the writing phase of the Action Plan.

The screenshot shows a confirmation dialog box titled "Confirm?" overlaid on the form. The dialog box contains the text: "Submitting this form may change the completion phase and your edit permissions. Are you sure you want to continue?" and has "YES" and "NO" buttons. The background form is dimmed, showing the same "Available Completion Phases:" list as in the previous screenshot.

This will move the plan from 'Incomplete' to 'Review' phase.



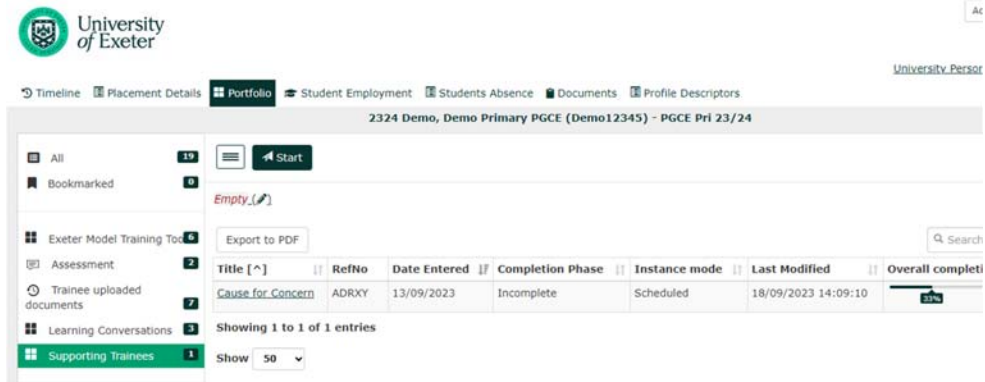
After you press 'Continue' the Action Plan will now show that it is in Review phase.

The Action Plan will return to the first screen. Now use the Go Back button to return to your home screen or to the trainee timeline.

You will return to the CFC when you review whether the targets have been met by their deadline date.

6.5 Reviewing the Action Plan

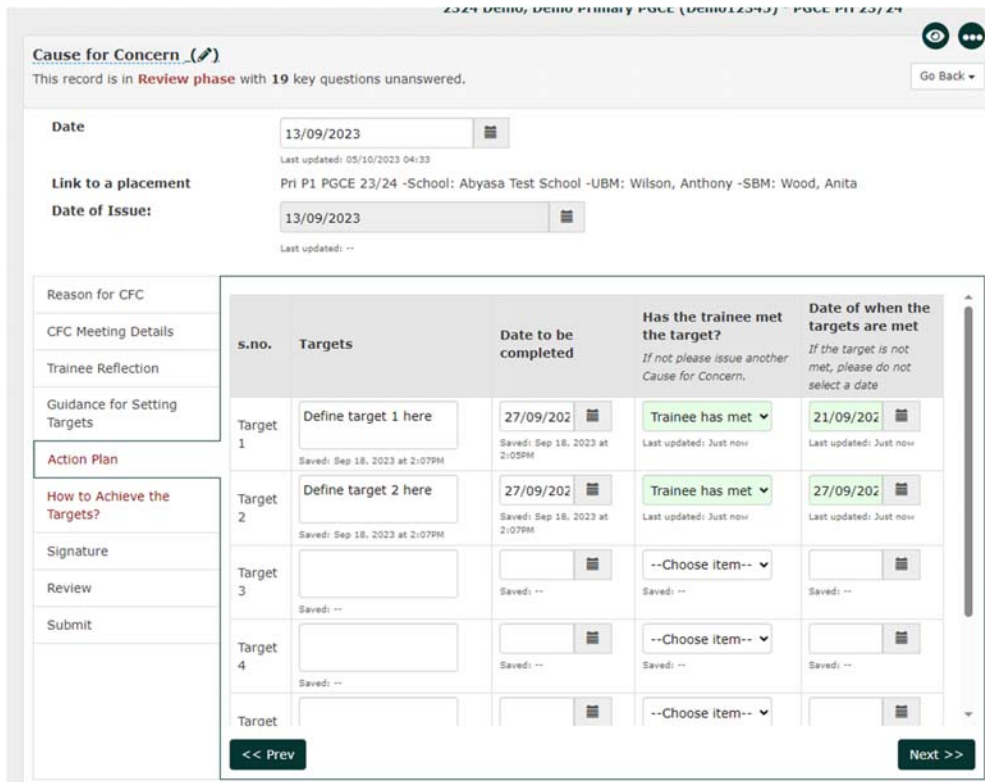
Access the CFC again from the Portfolio screen. The CFC is listed under the 'Supporting Trainees' filter. Click on the hyperlink 'Cause for Concern' to open the document.



With the CFC in Review phase, go to the Action Plan tab.

You can now complete the two columns 'Has the trainee met the target' and 'Date of when the targets are met'. This section is completed by the Lead Mentor or UVT or ITEC.

You can select whether the targets are met, or are not met.



You do not need to use the 'How to Achieve the Targets?' or 'Signature' tabs. They are not revised in Review phase. (Remember – the signature page acts to show agreement to the writing of the CFC at the beginning of the progress. The signatures are not needed again to 'sign off' the CFC).

Click next to move onto the Review tab

This tab cannot be edited by trainee. It can only be completed by the Lead Mentor, ITEC, UVT or Partnership Office.

Continue the Review phase in the same way whether the trainee has, or has not, met the targets.

Cause for Concern (📄) 🔍 ⋮
This record is in **Review phase** with **19** key questions unanswered. Go Back ▾

Date 📅
Last updated: 05/10/2023 04:33

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

Date of Issue: 📅
Last updated: --

Reason for CFC	Please go to the Submit section and click on the 'Submit' button to be able to edit this section. Note: The form should be in 'Review' phase to be editable.
CFC Meeting Details	
Trainee Reflection	Has the trainee met all the targets? <input checked="" type="radio"/> Yes <input type="radio"/> No <small>Last updated: Sep 18, 2023 at 2:21PM</small>
Guidance for Setting Targets	
Action Plan	Is the Cause for Concern concluded? <input checked="" type="radio"/> The CFC has been concluded <input type="radio"/> The CFC has not been concluded and another CFC will be issued <small>Last updated: Sep 18, 2023 at 2:21PM</small>
How to Achieve the Targets?	
Signature	
Review	
Submit	

<< Prev Next >>

Press next to move to the Submit tab and press submit

2324 Demo, Demo Primary PGCE (Demo12345) - PGCE Pri 23/24

Cause for Concern (📄) 🔍 ⋮
This record is in **Review phase** with **19** key questions unanswered. Go Back ▾

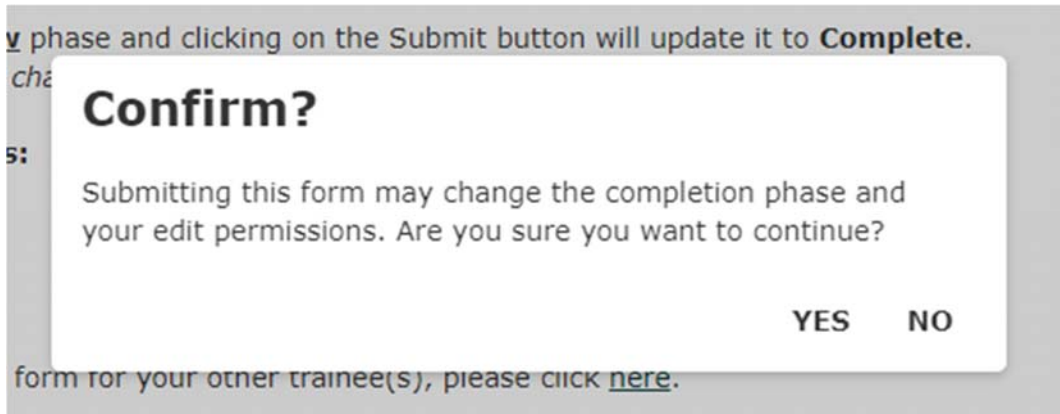
Date 📅
Last updated: 05/10/2023 04:33

Link to a placement Pri P1 PGCE 23/24 -School: Abyasa Test School -UBM: Wilson, Anthony -SBM: Wood, Anita

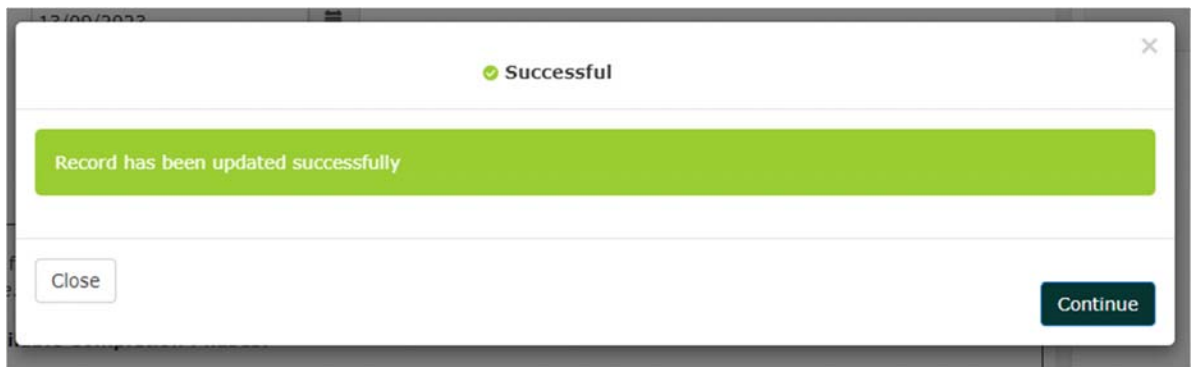
Date of Issue: 📅
Last updated: --

Reason for CFC	The form is currently in Review phase and clicking on the Submit button will update it to Complete . Note: The edit permission may change after you submit the form.
CFC Meeting Details	
Trainee Reflection	Available Completion Phases: 1. Incomplete: 2. Review: 3. Complete:
Guidance for Setting Targets	
Action Plan	If you would like to update this form for your other trainee(s), please click here .
How to Achieve the Targets?	
Signature	
Review	
Submit	

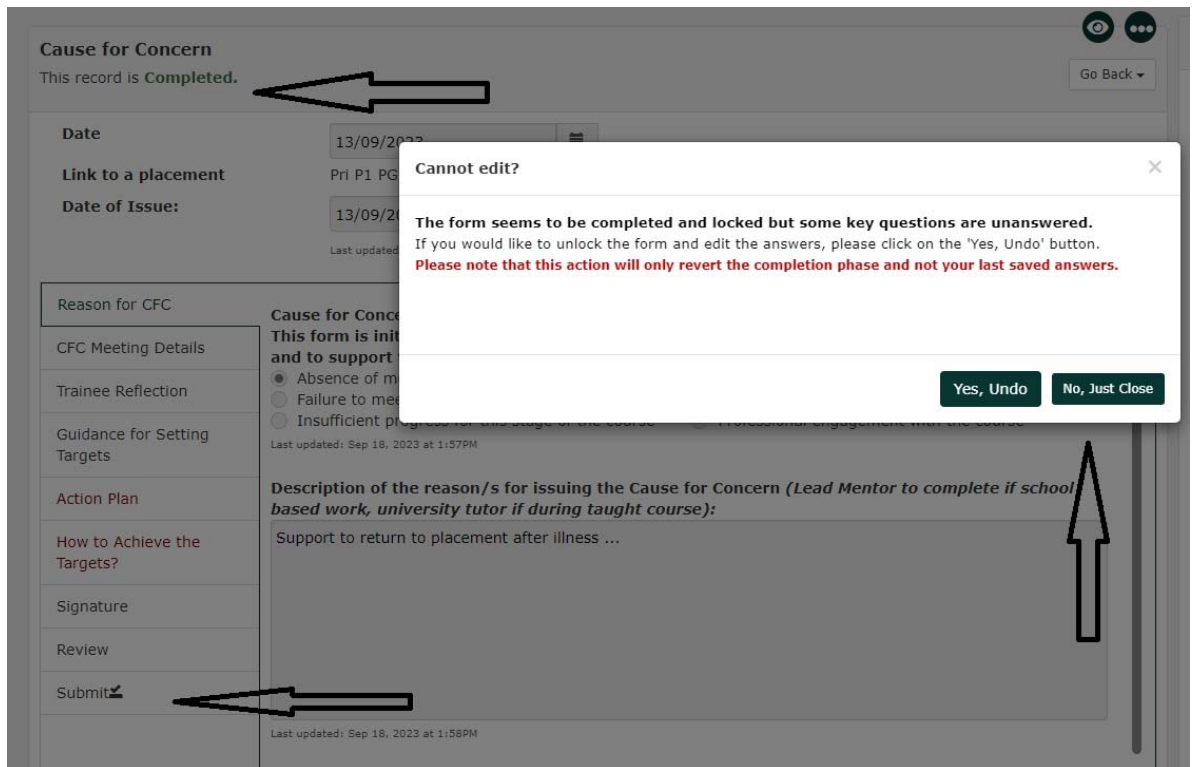
<< Prev **Submit**



Press Yes.



Press Continue



You can see in the top left corner this record is now completed. The submit tab at the bottom left also has a check mark. Press 'No, just Close'. Return to your home screen or timeline.

6.6 When a TSP or CFC has not been met

If a trainee has not met the requirements at Action Plan review, you will still need to complete the relevant fields in the Action Plan tab to say 'not met'.

Follow the same procedures as above, noting on the Review tab that the targets were not met.

Ensure that you submit the document as above. This will close the document so that you can issue a fresh CFC as necessary. If you have any difficulties with submitting the CFC in this instance please contact exeterpartner@exeter.ac.uk for assistance.

We do not allow a TSP and CFC to be in progress at the same time. If a TSP progresses to a CFC (or if CFC targets are not met) the first document must be signed off and submitted first to close it. The CFC is then issued to address the training targets as needed.

The only exception is in respect of Action Plans issued to support Fundamental English and/or Maths. Action Plans for these are only issued by certain university subject leaders and can be in operation at the same time as a TSP or CFC addressing other concerns.

APPENDIX 1 : IDP TEMPLATE USER GUIDE

When adding a template select the appropriate heading to find the relevant template. You will see that there are scheduled and unscheduled items. The scheduled items will have dates when they need to be completed and the unscheduled items can be added as many times as needed.

Heading	Scheduled templates	Unscheduled templates
Exeter Model Training Tools	Demonstrations and Agendas (scheduled for first two weeks in school) Lesson Observation Form (scheduled for first two weeks in school) UVT visit lesson observation (scheduled for each visit)	Demonstrations and Agendas Lesson Observation Form UVT lesson Observation form (for any additional visits)
Assessment	Anticipating Practice FRAP Beginning Practice FRAP Consolidating Practice FRAP Developing Independence FRAP FSR PGCE to ECF Transition Document	
Trainee uploaded documents *School Direct distance Framework tasks are referred to as Framework Reflections **not relevant for School Direct Distance	Safeguarding x2 (school 1 and 2) Induction x2 (school 1 and 2) Beginning Practice Framework Tasks* Consolidating Practice Framework Tasks* Developing Independence Framework Tasks* Extension and Enrichment Framework Tasks* Summative assignment and Feedback (x2) ITAP Reflection**	Trainee document upload Peer Teaching** Autumn Term Weekly Reflection** ITAP Reflection**
Learning Conversations	Reflective Conversation x 6 (x 9 for School Direct Distance) UVT visit record (scheduled for each visit) Weekly Development Meeting (scheduled for first two weeks in school)	Weekly Development Meeting Weekly Development Meeting (Developing Independence & Extension and Enrichment)- this template incorporates the Focused Reflection Additional UVT visit record
Supporting trainees	No templates listed- Mentors/UVTs should add these documents from their own IDP dashboard	

APPENDIX 2: HOW TO RENAME TEMPLATES

When adding scheduled templates it is not usually necessary to rename them as they will only appear on the timeline/ in the Portfolio once so will be easy to find named as they are.

When adding unscheduled additional Exeter Model Tools or trainee uploads it is useful to rename the template so that Mentors and UVTs looking at the Portfolio can easily find the evidence that they need to see.

To rename a template select the pencil icon next to the template name:



Examples/ suggestions:

Template name	Suggested way to rename it (where subject is written below this refers to National Curriculum subject for primary trainees, for secondary trainees topic refers to which area is being taught within their subject)
Demonstration and Agenda	Demo/Agenda-selected focus- yr group-subject or topic-date e.g. Demo/Agenda- Giving clear task instructions-yr 3 maths- 5 th Jan
Lesson Observation Form	Lesson Observation-yr group- subject or topic e.g. Lesson Observation- yr 8- Industrial Revolution 10 th Jan Lesson Observation- yr 2- science 25 th Feb
Peer teaching	Peer Teaching- topic/focus/subject- date
Trainee document upload	Describe what the document is to anyone looking through the portfolio
Weekly Development Meeting in the Developing Independence and Extension and Enrichment Phase	WDM in DI&EE-Focused Reflection area of Focus-Date e.g. WDM in DI&EE-Pedagogy-6 th -18 th May