



## Approved Centres - Uploading batches to the HUB for CMI Moderation – HE Partners and e-portfolios - AB/GUD/016/Jan19/V01

Certification requires that units marked and internally verified by the Centre are moderated by CMI. To facilitate this you must make a claim by uploading a batch of Learners, and list the units you are claiming. CMI will use this evidence for moderation purposes. Subject to successful moderation, certification of the batch will follow and certificates will be sent to your Centre.

The first step in this process is to select the units you wish to be passed for each batch of Learners and then upload a sample of work for each unit to the CMI HUB.

This document goes through the upload procedure step by step giving you detailed instructions to complete this process and useful tips.

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**Note: Please be advised, if a mistake is made in the units claimed i.e. if this does not reconcile with our records or a Learner is registered on another qualification, CMI is required to delete an incorrect batch. This will take approximately 5 working days from the day of notice to CMI. Furthermore, you will be unable to upload anything against the same units for those Learners previously selected for moderation until you have been notified of the deletion.**

**Note: The HUB will timeout after approximately 10 minutes, therefore, please have everything you will need to upload to hand before you start. We suggest that you consider this when deciding how many students you put into an individual batch. For large cohorts, it is suggested that these are split into smaller batches of less than 50 Learners.**

**Note: To start the process you will need a list of Learners, the units you are claiming for each Learner and each Learner's CMI P number.**

## Accessing The HUB

Please use your login details for <https://www.managers.org.uk> - if you cannot remember your password, please use the “Forgotten password?” section on the Managers website. This can be found on the Login page underneath the “Login” button.

Link to The HUB: <https://hub.managers.org.uk>

## The Home screen

The grid of buttons - each button leads to a different section of the HUB relating to its title and brief description. Depending on the level of access that your Programme Director has given you, depends on which sections of the HUB you can access.

For Uploading a batch, you will need access to the “ADD Optional Units (Formerly PAR)” and “Moderation” sections.

## Moderation SLA and Certification times

The Service Level Agreement (SLA) time for Moderation is 4 weeks from the time that a batch is uploaded to receiving the results of the batch. Should a batch be returned to you as “Insufficient sample” or “Returned for editing”, the SLA will begin again once the batch has been re-submitted by your Centre.

Certification will happen automatically if the batch is passed by the Moderator.

Certificates should be delivered within 10 working days after the batch has been passed by the Moderator.

## Selecting the units on a student’s Personal Academic Record (PAR)

This is the first step in uploading Learner work for external moderation.

1. From the Home page, select the “**ADD Option Units (Formerly PAR)**” button,  
A new page will open titled “CMI PAR”
2. Select your Centre from the “Available Centres” drop-down box if it is not already selected,
3. Click the “**Add/Remove Optional Units**” button,  
Two options will appear, “Individual Add/Remove” and “Bulk Add Optional Units”
4. To select single units or a mix of units for a small number of Learners, select the “**Individual Add/Remove**” button. Alternatively, to select the same units for multiple Learners, select the “**Bulk Add Optional Units**”.  
If you selected “**Individual Add/Remove**”, you will now be presented with three options, “Filter by Name/Number”, “Filter by Qualification” and “Display all Records”

If you selected “**Filter by Name/Number**”, you will be presented with a *free-text* box prompting you to “Enter Membership Number or Surname”, type the Learner’s “P” number here or type their surname and select the “Update Optional Units” button, do not press enter as this will refresh the page,

- A. When you press the ‘update Optional Units’ button, an expandable list will appear underneath the “Proceed with Bulk Unit Update” button, click the “+” icon to expand this list,
- B. A second expandable list will appear underneath the previous one with the Learner’s name and “P” number as the title, click the “+” icon next to their name and all of the units for that qualification will appear,
- C. Click the grey box next to the unit you wish to add to select it,
  - If there is no grey box - this means that the unit has already been selected and will not need to be selected again
  - If the text is black instead of pink, this means moderation has already taken place for this unit and there should be a brief description of the date, time and result achieved

- D. Once you are happy with your selection, i.e. you have clicked all the units to be claimed for the Learner/s, click the **“Add all selected units.”** button at the bottom of the list
  - E. The page will refresh. Once this is done, click the **“Continue”** button in the bottom corner.
5. If you selected **“Filter by Qualification”**, you will be presented with a drop-down box prompting you to select the qualification that your Learner(s) is/are on. Once you have selected the qualification, click the **“Update Optional Units”** button,
- a. When you click the ‘update optional units’ button, an expandable list will appear underneath the **“Update Optional Units”** button. Click the **“+”** icon to expand this list.
  - b. A list of all the Learners that are registered and current on the qualification you selected will appear.
  - c. To add the units for each Learner, click the **“+”** icon next to their name and “P” number, all of the units for the qualification previously selected will appear.
  - d. Click the grey box next to the unit you wish to add to select it,
    - i. If there is no grey box - this means that the unit has already been selected and will not need to be selected again
    - ii. If the text is black instead of pink, this means moderation has already taken place for this unit and there should be a brief description of the date, time and result achieved
  - e. Repeat the previous step until you are happy all of the units you wish to add have been selected.
  - f. Click the **“Add all selected units.”** button at the bottom of the page.
  - g. The page will refresh, once this is done, click the **“Continue”** button in the bottom corner.
6. If you selected **“Display all records”**, click the **“Update Optional Units”** button,
- a. When you click the ‘Display all records’ button, a list of all the qualifications with current, registered, Learners will appear. Click the **“+”** icon to expand these lists.
  - b. Click the **“+”** icon next to the Learner you wish to select units for.
  - c. A list of all the units for that qualification and Learner will appear.
  - d. Click the grey box next to the unit you wish to add to select it,
    - i. If there is no grey box - this means that the unit has already been selected and will not need to be selected again
    - ii. If the text is black instead of pink, this means moderation has already taken place for this unit and there should be a brief description of the date, time and result achieved
  - e. Repeat the previous step until you are happy all of the units you wish to add have been selected.
  - f. Click the **“Add all selected units”** button at the bottom of the page.
  - g. The page will refresh, once this is done, click the **“Continue”** button in the bottom corner.
7. If you selected **“Bulk Add Optional Units”**, you will now be presented with a drop-down menu prompting to select the qualification that your Learners are on
- a. Select the units that you would like to upload Learner work to and then click the **“List Available Learners”** button.
  - b. An expandable list will appear underneath the **“Proceed with Bulk Unit Update”** button, click the **“+”** icon to expand this list.
  - c. You will see a list of all the available Learners that are on the qualification you previously selected - If a Learner you expected to appear is not there, this usually means that they have already been selected on one or more of the units that you selected.
  - d. Click the grey square next to the Learner’s name and “P” number to add the units previously selected to that Learner.
  - e. Repeat the previous step for all of the Learners you would like to add the units to.
  - f. Once you are satisfied with your selection(s), click the **“Proceed with Bulk unit update”** button above the list of Learners.
  - g. Uploading the Learner’s work

**Note: On this screen there is an “Override IV Feedback and Assessment Brief Upload” tick box. PLEASE TICK THIS, then click the green button in the bottom right of the screen.**

**For HE Centres:**

You will NEED to provide evidence of the following:

- 1 A sample of Student work for each mapped module on the dual accredited programme being claimed.
- 2 Evidence that each Student being claimed has passed each mapped module e.g. Exam Board transcripts
- 3 Evidence that an internal sampling/moderation has been carried out to ensure that there is sufficient evidence in the Student work to meet the CMI requirements.

This evidence can be provided to the Moderator via email, during the on-site visit (where applicable) via the VLE or via any other suitable means.

**For e-portfolios where standalone CMI qualifications are to be moderated:**

Ensure the Moderator has been given access to the e-portfolio and that sufficient training has been provided so they can navigate the system

For moderation of e-portfolios, the CMI Moderator needs to be able to clearly see the evidence without trawling through the e-portfolio systems. When requesting moderation of an e-portfolio, please provide an evidence locator (signposting) document (with links) clearly stating where the following information can be found:

- Learner work/Assignment with Learner Authenticity statement (sample to be defined by CMI)
- Centre Authenticity statement
- CMI Marksheet completed with feedback against each assessment criteria
- Internal verification form for each Learner that has been internally verified
- Internal verification sampling plan for the cohort being uploaded

If this information is not signposted clearly, the Centre will be asked to resort to uploading this information to the CMI HUB.

Click the **“Select Units to Pass on Batch”** button,

1. An expandable list will appear, click the **“+”** icon next to the qualifications title to expand the list,
2. A list of all the Learners registered and current on this qualification should appear,
3. To select the units that you wish to upload against, click the **“+”** icon next to the Learner’s name to expand their list, then click the grey box next to the unit to select it,
  - If there is no box next to a Learner’s name and **“P”** number, this means that they have not had their units selected on PAR and you will have to do this before you can proceed any further
  - If the Learner is not listed, please contact your Customer Data Administrator (CDA) or call **01536 207496** if you do not know who this is

**Note: every Learner you wish to be certificated needs to be selected at this point along with each unit you wish to be certificated for those Learners.**

4. Once you have selected all of the units for all of the Learners you wish to upload work for, press the **“Submit”** button,
5. A new window will open.
6. Check that everything has been selected, and that all Learners and units you wish to be certificated are showing

- If you are unsure, please contact the Awarding Body team on **01536 207496 - Option 1** or **awardingbody@managers.org.uk** as this is the last point that changes can be made and it can take approximately 5 working days for a batch to be deleted by CMI

7. If you are happy that everything is correct, click the **“Submit Batch”** button on the right hand side.

## Understanding batch statuses on the HUB

Listed below are the various statuses that can be applied to a batch depending on its progress in the moderation process or if it has been returned to you for amendment(s).

### “Centre Completing”

This status will be applied to your batch once you reach step 14 of the “Uploading the Learners work” guide. You will also be able to delete your batch at this point should it be necessary.

### “With Moderator”

This status indicates that your batch has been sent to a Moderator, the 4-week turn-around SLA begins at this point.

### “Returned for editing”

This status will allow you to re-upload the “IV Feedback” or “Assessment Brief” files but will not allow you to amend Learner work. Check the “Comments” document attached within your batch to find out what the Moderator requires.

### “Insufficient sample”

This status will allow you to re-upload the “IV Feedback” or “Assessment Brief” files and amend the Learner work submitted by uploading more documents or overwriting currently uploaded documents. Check the “Comments” document attached within your batch to find out what the Moderator requires. If the word count is too high, Learner work will be returned and therefore will need to be amended.

### “Centre re-submitted”

This status indicates that you have re-submitted your batch to the Moderator. The Moderator will now have another 4-weeks as per our SLA to return this batch to you completed or otherwise.

### “Complete”

This is the only status that will show under the “Completed Batches” tab, if your batch has this status, the selected units and Learners have passed the External Moderation. You can find any additional comments from the Moderator regarding your batch in the “Comments” document attached within your batch.