Employer Guide- Completing and Signing Forms

Queen Mary, University of London

Version: 1.0

Signing forms via email link

The easiest way to sign a form is by clicking on the link you receive via email. You will receive an email from noreply@smart-assessor.co.uk with the subject 'Signature Required on Smart Assessor Form'. Click the link within to access the form to sign it.
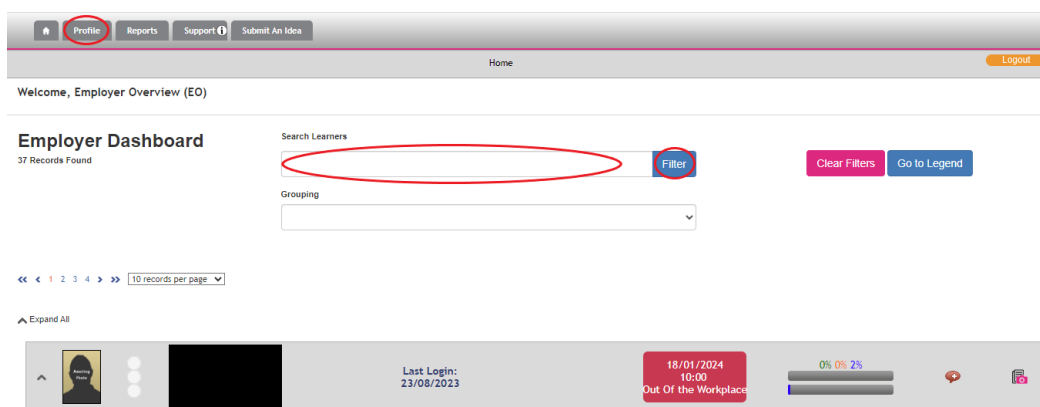
1. Click on the link within the email. If you are not already logged in, please login (using the instructions from the relevant 'How to login' guides). You will then be able to access the form.
2. Scroll down (you may have to click 'next' to navigate to the correct page) and click the checkbox next to 'employer' to "sign" the form. Once you have done this, click 'save' and then 'return without saving' to exit the form.

If the link within the email has expired (it lasts 72 hours), you can access the form via your dashboard as described below.

Signing forms manually (via 'Learning Plan')

Remember, the easiest way to complete the forms allocated to you is always via the email sent from noreply@smart-assessor.co.uk informing you that you have an e-form that requires your signature. However, if this link has expired (each link will last only 72 hours), you will need to access these manually. The following steps will detail how to sign onboarding documents and tripartite review forms.
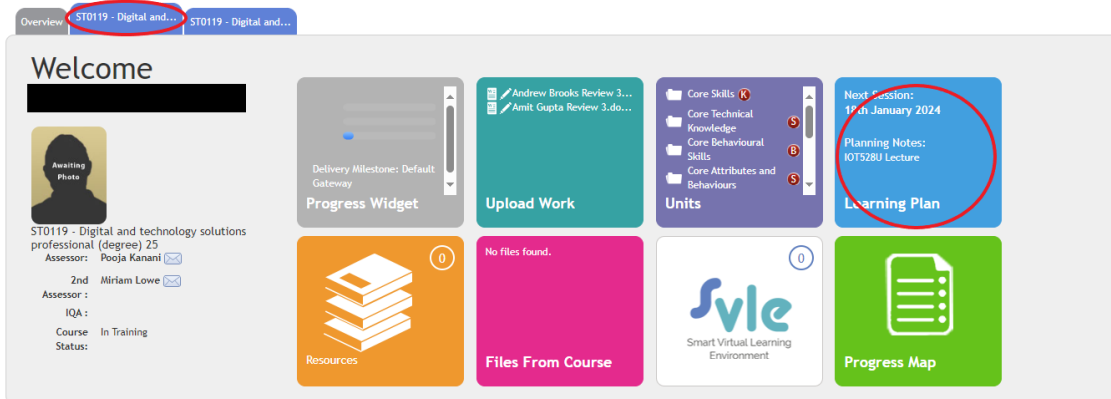
1. From the homepage, use the Search Learner bar to search for the learner and select filter to find the learner.

2. On the left-hand side next to their photo, click the dropdown arrow and select the folder below 'portfolio' for the course related to your apprentice (there may only be one course) to be redirected to the learner's dashboard.

3. From the learner's dashboard, click on the blue tab indicating their course and then click on 'Learning Plan' within the blue square to see a list of all the learner's sessions.

4. Scroll down to navigate to the correct date and time of the review/induction session form you need to access. Click the chevron next to the Course Name, which will open up the resources for the session. From the list on the right-hand side, click on the red 'F' next to the word 'Review' for review forms or next the word 'General' for onboarding forms. This will open the relevant form.

Tip: If there are a large number of sessions listed, you can use the filter 'type' at the top, selecting 'formal review' from the dropdown menu for reviews or 'induction' for onboarding forms.

5. Once you have read the form and updated with any relevant comments, you can sign electronically by ticking the 'Employer' check box.

6. Smart Assessor forms do not automatically save changes so remember to click 'Save' at the top of the form to save your signature. Click 'Return (without saving)' when finished so that others can access the form.
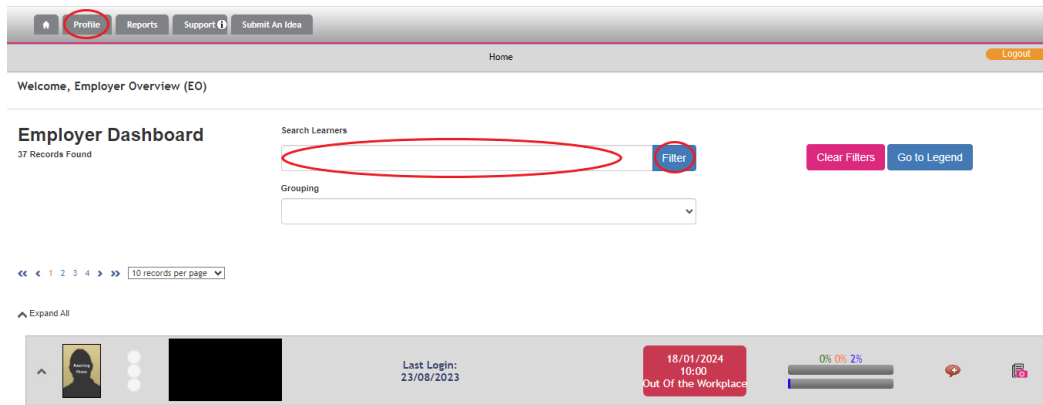

N.B If you are unable to access a form as it says another user has the form open, please wait and try again half an hour later. A re-boot may also solve this issue. If the problem persists, please email your contact at QMUL to solve this issue.

Signing forms manually (via 'Files From Course')

Most forms are accessed via the Apprentices Learning Plan (as above). However, sometimes forms will be issued via 'Files from Course' and users will need to access forms there. For example, when an apprentice changes employer during their programme or returns from a Break in Learning.

Remember, the easiest way to complete the forms allocated to you is always via the email sent from noreply@smart-assessor.co.uk informing you that you have an e-form that requires your signature. However, if this link has expired (each link will last only 72 hours), you will need to follow the steps below to access the form.

1. From your homepage, use the Search Learner bar to search for the learner and select 'Filter' to find the learner.
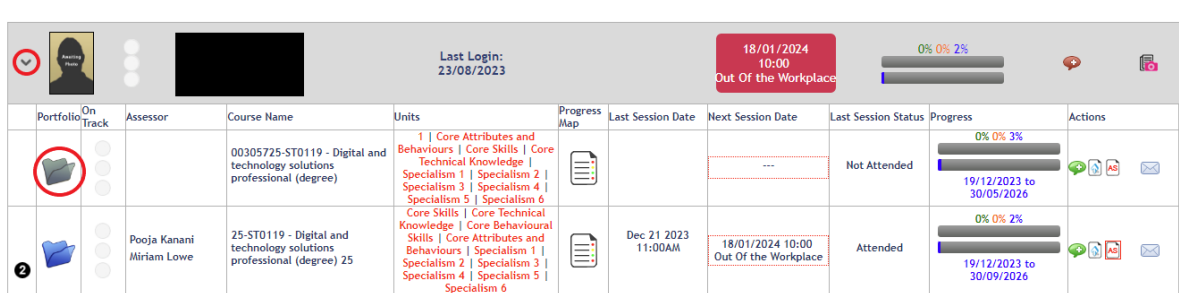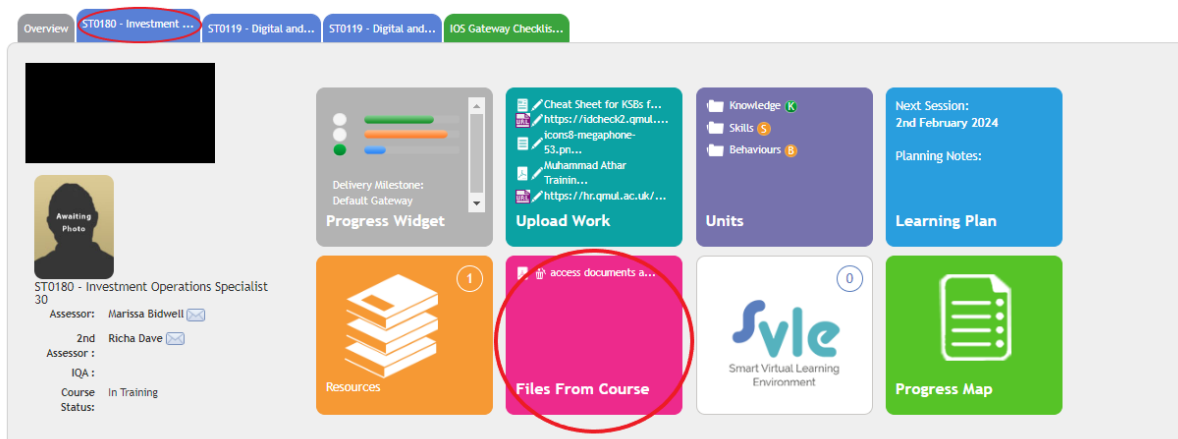
2. On the relevant learner on the left-hand side next to their photo, click the dropdown arrow and select the folder below 'portfolio' for the course related to your apprentice (there may only be one course) to be redirected to the learner's dashboard.

3. From the learner's portfolio, click on 'Files From Course' within the pink square.

4. On the page that opens, click on the chevron next to the word 'Forms'.

5. The form(s) should appear in the Allocated Forms section.

If the forms are not listed here, you will need to amend the date range 'From' and 'to' in the Allocated Forms section to include the date when the form would have originally been allocated to you (this does not have to be specific, so you can go back to a date that you know was before the date it was issued to guarantee it shows up). **Please do not use the 'Allocate Forms' dropdown or 'Allocate' button.**

6. Once you can see the form(s)allocated to you, click on the relevant form name and the form will open.

7. Fill out the relevant sections of the form and then sign by clicking on the box.

NB: If you need to come back to the form later to add any details, you can always click save (Smart Assessor does not automatically save changes). Please do not sign the form until you are happy that the form is complete from your perspective.

8. Once signed, remember to click 'Save' at the top of the form to save your changes (these will not automatically save). Then, click 'Return (without saving)' when finished so that others can access the form.

N.B If you are unable to access a form as it says another user has the form open, please wait and try again half an hour later. If the problem persists, you should email your contact at QMUL to solve this issue.