

portal user guide for Assessors



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About the Careerforce iportal

The Careerforce iportal provides access to trainee information stored in our Client Management System to our customers such as Assessors, Training Coordinators and Managers. The iportal also allows for trainee result submission and processing as well as sending trainee communications such as On Hold and Termination requests.

Note: On hold and termination requests can only be done by using Admin role (access).

The data displayed is a real-time reflection of our Client Management System, this includes the report data on the formatted reports found on the trainee record and the reports page. The *New Zealand Qualifications Authority (NZQA)* and *Literacy & Numeracy for Adults Assessment Tool* data is updated on a weekly basis.

There are three main roles available on the iportal. Permissions for roles and access to trainees are based on:

- 1) whether or not you are a Careerforce registered assessor.
- 2) how your workplace structure is set up in our database; and,
- 3) your functional role at your workplace

1 *Careerforce Registered Assessors*

Upon assessor registration you are given access to trainees either via your workplace(s) or when you have been contracted to assess specific trainees (either by Careerforce or directly by a workplace).

Assessors are encouraged to submit all results through the iportal. This allows you to retain any paper copies for potential moderation requests as well as quicker result processing at Careerforce.

2 *Your workplace structure – Training Provider*

Employer contacts have access to their employees that are enrolled in training with Careerforce. This arrangement also exists for a parent company to access all workplaces.

Training Providers are those organisations that have been brought in to manage and/or lead the training and assessing. Training providers do not have accreditation for our unit standards from the NZQA and must have Careerforce registered assessors.

3 *Your role at your workplace*

If you are required to enter results on behalf of other assessors at your workplace(s), there is a “Plus” role for Employers or Training Providers that allows for this. A memorandum of understanding must be signed and submitted to Careerforce before this Plus role can be granted.

Help & General Administration

iportal address: <https://iportal.careerforce.org.nz>

For all iportal inquiries, please contact the Careerforce Client Services team.

0800 277 486

info@careerforce.org.nz

Contact Us – General form

This includes:

- Assistance using the iportal
- Training requests for new iportal users
- Changing your email address / username
- Adding more trainees for you to access
- Granting more role permissions including a copy of the Memorandum of Understanding
- Correcting previously entered data such as an incorrect unit standard
- Adding another user for your organisation
- Forgotten username
- Locked out of iportal (this occurs after 6 incorrect password entry attempts)

Inactivity during a session on the iportal

A message will pop up instructing you to move your mouse or you will be logged out after **25** minutes of inactivity.

If you are logged out of the iportal and there are results in the Review table, the results will still be there the next time you log into the iportal.

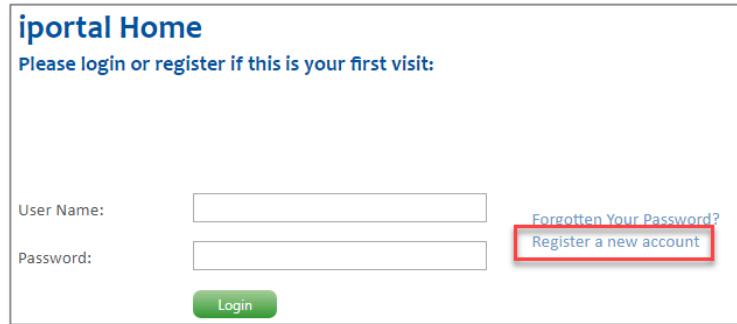
If you are logged out due to inactivity or experience network connectivity issues when entering results, please return to the **Enter Results** page and click **Send Results to Careerforce** as soon as possible.

Users who have not logged in for more than 1 year

Users who have not logged in for a year will have their registration removed from the iportal. You will need to re-register. This is also a good time to check we have the correct details on file for you.

How to Register

Go to the iportal homepage and click on Register a new account:



The screenshot shows the 'iportal Home' page with the heading 'Please login or register if this is your first visit:'. It features two input fields: 'User Name:' and 'Password:'. Below the 'Password:' field is a green 'Login' button. To the right of the 'Password:' field, there are two links: 'Forgotten Your Password?' and 'Register a new account', both enclosed in a red rectangular box.

Create your username

Username must be between 6 and 30 characters and cannot contain space and any of these characters @ # % + ' ? - Please do not use your full email address as your username.

Enter your email address

Must be the one Careerforce has on file for you

Create a password

Password must be a minimum of 14 characters and include at least one letter and one number or special character. Valid characters to make up your password are:

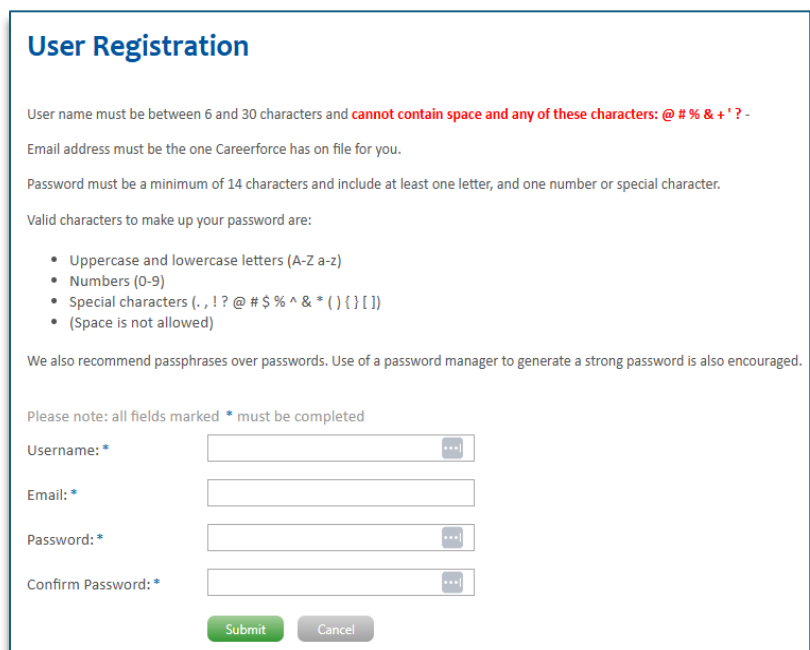
- Uppercase and lowercase letters (A-Z a-z)
- Numbers (0-9)
- Special characters (., ! ? @ # \$ % ^ & * () { } [])
- (Space is not allowed)
- We also recommend passphrases over passwords. Use of a password manager to generate a strong password is also encouraged.

Re-enter your password

Click **Submit**

A green confirmation message will appear at the top of the page when successful. You can now log in to the iportal.

An email will also be sent with your username. It is not necessary to view the email to log in.




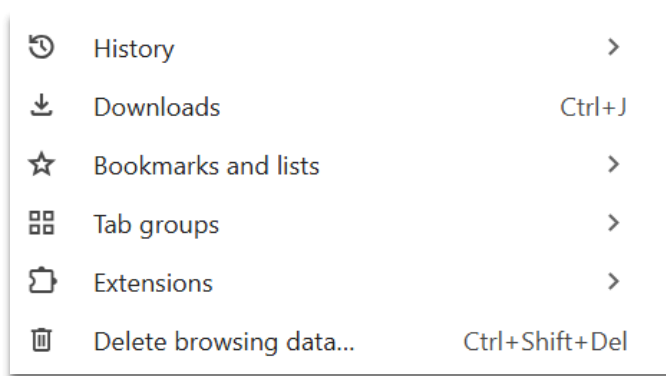
The screenshot shows the 'User Registration' form. It includes the following text: 'User name must be between 6 and 30 characters and cannot contain space and any of these characters: @ # % & + ' ? -', 'Email address must be the one Careerforce has on file for you.', and 'Password must be a minimum of 14 characters and include at least one letter, and one number or special character.' Below this is a list of 'Valid characters to make up your password are:' with the same list as above. A note says 'We also recommend passphrases over passwords. Use of a password manager to generate a strong password is also encouraged.' A 'Please note: all fields marked * must be completed' is followed by four input fields: 'Username: *', 'Email: *', 'Password: *', and 'Confirm Password: *'. Each field has a small icon to its right. At the bottom are 'Submit' and 'Cancel' buttons.

Can't sign into iportal

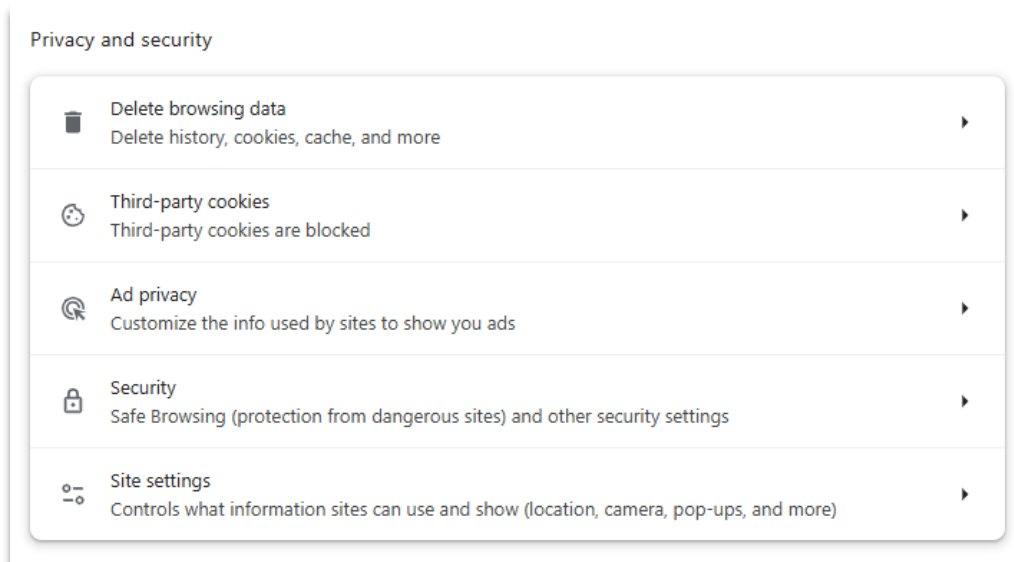
If the iportal doesn't allow you to login even if you enter correct username and password, then it could be a browser cache issue to fix this please try below tips to fix it.

If the browser type is Chrome:

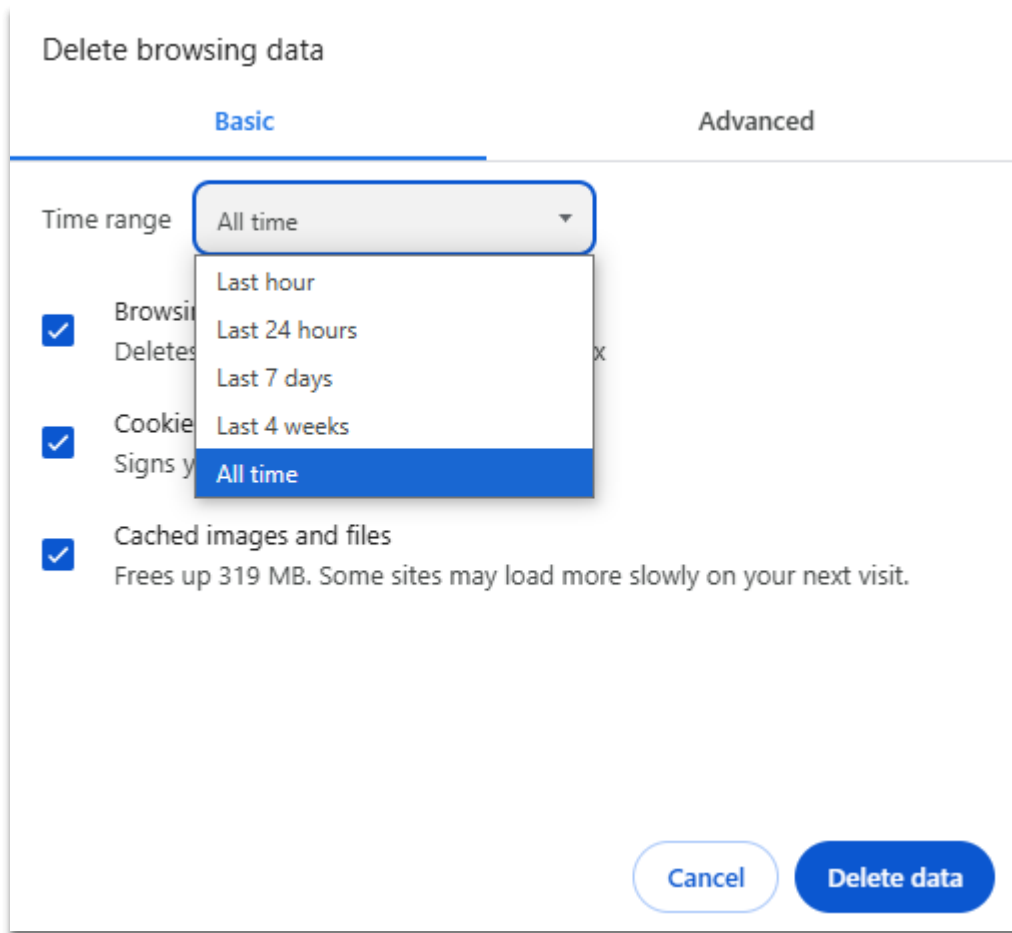
1. On your computer, open Chrome.
2. At the top right, click More .
3. Click delete browsing data.



4. Click delete browsing data again




5. In Time range, use the drop-down box to select All time, then click Delete data



Now please close the window and re-open chrome and try logging into iportal again.


If the browser type is Edge:

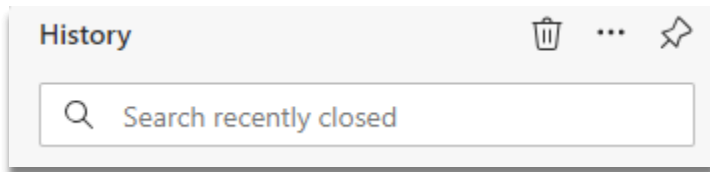
1. On your computer open Edge
2. At the top right, click more 



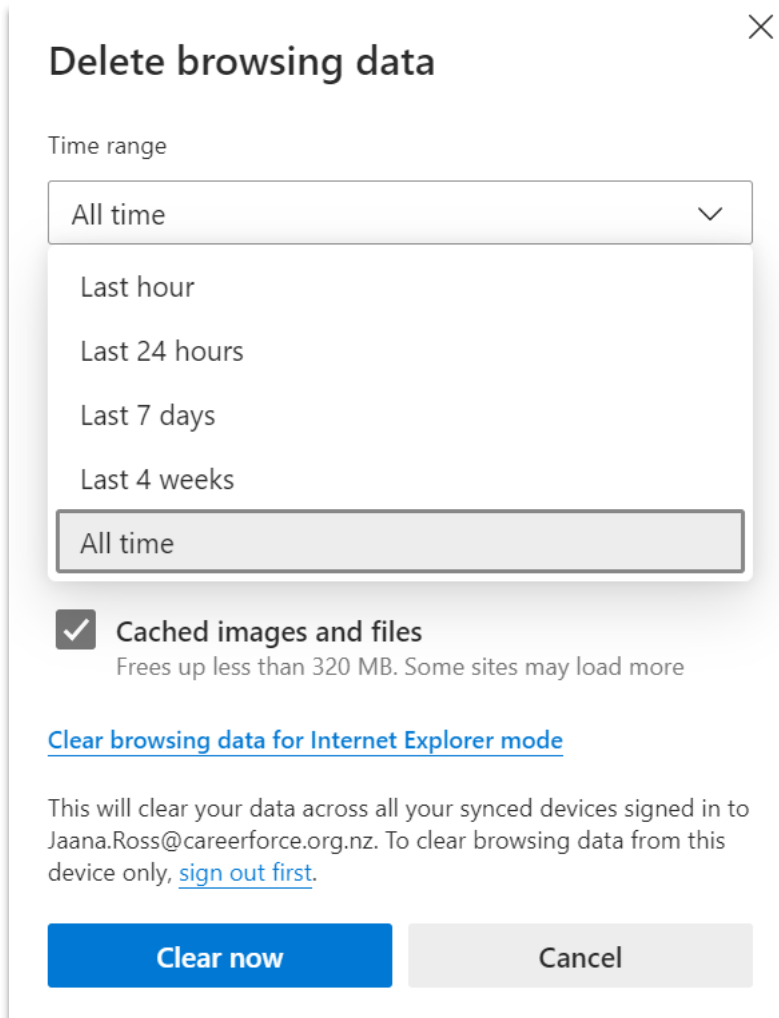
3. Select History



4. Select the rubbish bin icon 



5. Under Time range use the drop-down box to select All time, then click Clear now



Recommended browsers

We actively test on the following browsers and recommend these for best results:

- Google Chrome (Latest version)
- Microsoft Edge (Latest version)
- Safari (Latest version)

- The following system / browser combinations should all display content correctly. If you have a system / browser combination on this list and are having difficulties, please contact our support team.

If you do not know which browser you are using, click on the link below (control and click if it does not open by just clicking), and it will tell you which one you are using.

You could try using a different browser

What browser you are using? <https://www.whatsmybrowser.org/>

If you require further support with your device, please contact your IT department or our Client Services team on 0800 277 486.

Navigation on the iportal

The menu for the role being used is displayed on the left side of the page.
The 2nd line (under the word iportal) tells you which role you are currently using.

The page that you are currently on will be in green text.

Reminder: that the ROA page is now called the Trainee Record.

Contact Us has various forms, so you could select any form depending upon your role in the organisation.

portal

Assessor

Assessor scope &
Assessor guides

Assessor workplaces

Hono Mai meetings
for Assessors

Assigned trainees

Enter results

View results entered

Trainee Record

Assessments

Academic
Misconduct

Change role

Contact Us

General Enquiry

Submit a new
Training Agreement

Change Password

Sign Out

Academic misconduct

By clicking on the link, it will take the assessor to this page with these instructions then a form that needs to be filled out.

Academic Misconduct

You'll have heard some discussion at Careerforce about academic dishonesty or academic misconduct in recent months. Some of you will have been more impacted than others.

The problem of academic misconduct among our learners is increasing in size and complexity and is significantly impacting more and more Careerforce teams and our operation.

When a learner presents assessment evidence that is not their own, gathered from another learner's work, or from online resources (including generative AI), or from any other sources, we call this '**academic misconduct**'. 'Misconduct' means some form of wrongdoing. You may also hear this referred to as 'academic dishonesty' or 'academic integrity'.

Careerforce has set up an end-to-end process to **REDUCE, DETECT** and **MANAGE** academic misconduct.

For details about the **process for assessors** when suspecting a learner of Academic Misconduct, visit the web page: [Managing Academic Misconduct](#)

For more information, visit our [web page here](#) where you can view and download a one-page pdf, which you may wish to share with your learners.

To register the **first or second instance** of Academic Misconduct for a learner, please use the form below. This will trigger an email to the learner.

Academic Misconduct Register

Notify Careerforce of 1st / 2nd instance of Academic Misconduct

Learner's details:

ITO Number *

Learner name *

Programme

Unit Standard

Your details:

Name *

Email *

Academic Misconduct details:

First or second instance? *

1st 2nd

Suspected academic integrity issue breached

Details:

Submit

To register the third instance of Academic Misconduct for a learner, please use the form below. This will escalate the problem to the Moderation team.

Academic Misconduct Register

Learner's details:

ITO Number *

Learner name *

Email *

Programme

Unit Standard

Academic Misconduct details:

Suspected academic integrity issue breached

Details:

Requestor

Workplace contact

CWA / Account Manager

Assessor scope & Assessor guides

Displays the unit standards you are allowed to assess and the latest issued PDF of the assessor guide. When a unit is part of an integrated assessment package, the same PDF will be available against all the applicable units.

Aka Toi Assessor guides for modules are found on Aka Toi site only.

View an Assessor Guide on screen




Go to the unit standard (they can be sorted by domain or unit code) and click the PDF icon. The guide will open in a new window or tab. You can save, download or print from here.

Assessor scope & Assessor guides

Please note that assessor guides are for the latest resource issue only. If you require a previous version of an assessor guide, please contact Assessor-Admin@careerforce.org.nz

If it is an integrated assessor guide (used for more than one unit standard), the same guide is available for all applicable unit standards.

Learning Resources for New Zealand Certificates are available in the [Careerforce Library](#).

Domain	Unit Code ↕	Description	Assessor Guide
2215 : Whanau Ora and Community Support	01810	Provide information about resources and support services in a health or wellbeing setting	
2208 : Health and Disability Principles in Practice	01818	Describe the value of relationships in people's lives in a health or wellbeing setting	
2214 : Supporting People with Disabilities	01828	Identify services available to people with disabilities	

Save an Assessor Guide without opening it first

Right-click on the

PDF icon. Select

Save target as...

Pick the location to save the file. Click **OK**.

Assessor workplaces

This list, along with any assigned trainees, creates your Trainee pick lists for other iportal pages. If you are missing any workplaces or are no longer working for any of the listed workplaces, please contact Careerforce.

Trainees that you are contracted to assess (as they don't work for the same workplace as you) are found on the assigned trainee's page.

Assessor workplaces

Below are workplaces that you currently have permission to access on the iportal.

The workplace list, along with any Assigned trainees (for contracted assessors only), will make up your trainee pick lists on other pages. If you are missing any workplaces or have any questions, please contact Client Services at 0800 277 486 or info@careerforce.org.nz

Workplace ↑	Start Date
Beattie Community Trust	02/02/2013
Community Connections Supported Living Trust - New Plymouth, Taranaki	18/08/2018
Northbridge Lifecare Trust	18/08/2018
The Good Companion Ltd - Auckland	07/11/2019
The Good Companion Ltd - Christchurch	18/08/2018

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Assigned trainees

Displays trainees that contracted to you directly for assessing (generally those that do not work for the same employer as you).

Trainees that are linked to you via your workplace(s) will **not** be displayed here.

This list, along with any trainees at your assessor workplaces, creates your Trainee pick lists for other iportal pages.

If you are assessing a trainee for more than one programme at the same time, a line will appear for each programme until it is completed.

Assigned trainees

Listed below are trainees that you have been contracted to assess. If you are a workplace assessor, you will not see your workplace(s) trainees in this list.

The Assigned trainees list, along with the Assessor workplaces list, will create your trainee pick lists for the iportal.

If you are missing any trainees, please contact Client Services at 0800 277 486 or via email info@careerforce.org.nz or use our [Contact Us](#) form.

First Name ↑	Middle Name	Last Name	Preferred Name	NSN	Email Address	Home Phone	Mobile	Programme Name
Andrew	James	Bunn	Andy	115235760	andy.bunn@careerforce.o	0800 277 486	027 223 4411	: Additional Unit Standards
Andrew	James	Bunn	Andy	115235760	andy.bunn@careerforce.o	0800 277 486	027 223 4411	: NF Cleaning & Caretaking (Level 2) - Commercial Cleaning Strand
Pauline	Adelade	Ruff	Pauline	110882208			(027)645-6413	: Additional Unit Standards
Sue		Connor		3231684	sue.connor@careerforce.c		(027) 512-8179	: Additional Unit Standards

View 1 - 4 of 4

Enter Results

Enter results that **you** have assessed.

If you are entering results on another assessor's behalf, you must use the Employer Admin Plus or Training Provider Plus role in order to select the correct assessor name.

Aka Toi results do not need to be entered on the iportal, they will appear overnight on trainee records.

All results submitted may be subject to moderation by Careerforce.

1. Select the **trainee** name.
 2. Enter the **unit standard** and **version**.
 3. Enter (or select) the date you assessed the unit (Result Date).
 4. Click **Add Result to Review Table**.
- Repeat Steps 1-4 as required.*
5. Click **Send results to Careerforce**.

Note: Please make sure to click **Send results to Careerforce** button.

Enter results

Only continuing and on hold trainees with an NSN will appear in your trainee list.
Please ensure you enter the correct assessment date and unit standard version.

Trainee 1

Unit Standard 2

Version

Result Date 3

4

5 When you are finished entering and reviewing results, click here

Copy	Edit	NSN	Trainee	Unit Standard	Version	Description	Assessor	Provider	Result Date	Delete
		136556263	Jill Havens	28519	1	Maintain a safe and secure environment for people and support workers in a health or wellbeing setting : Version = 1	Jill Havens		28/03/2016	
		3231684	Suzanne Connor	28519	1	Maintain a safe and secure environment for people and support workers in a health or wellbeing setting : Version = 1	Jill Havens		02/03/2016	

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Edit a result

If you need to edit a result **prior** to sending it to Careerforce. This can only be used if the result has not already been reported.

This example has the wrong unit standard and version.

1. Click the **Edit** button beside the result.
2. Make the necessary change(s).
3. Click the **Update result** button.

Copy	Edit	NSN	Trainee	Unit Standard	Version	
		115235760	Andrew Bunn	26977	3	Mo eq = 3

Copy Result button

Use when a result in the Review table has details you'd like to re-use for another result (trainee and/or unit standard and version, or result date). This will save you time when entering results.

1. Click the green **copy button** beside the result to copy.

The details will re-populate in the result entry section.

2. Make **at least one** substantial change to the result:

- Trainee and/or
- Unit Standard and version

Other fields can also be changed.

3. Click **Add result to review table**.

The new result will appear at the top of the Review table.

Repeat steps 1, 2 and 3 as required. Review your result entry.

4. Click **Send results to Careerforce** when finished.

Note: Please make sure to click **Send results to Careerforce** button.

Enter results

Only continuing and on hold trainees with an NSN will appear in your trainee list.
Please ensure you enter the correct assessment date and unit standard version.

Trainee:

NSN:

Unit Standard:

Version:

Result Date:

3

2
Change here
and/or
Change here

When you are finished entering and reviewing results, click here →

1

Copy	Edit	NSN	Trainee	Unit Standard	Version	Description	Assessor	Provider	Result Date	Delete
		110882208	Pauline Ruff	23386	3	Support a person to meet personal care needs in an aged care, health, or disability context : Version = 3	Jill Havens		11/04/2016	

Page 1 of 1 View 1 - 1 of 1

The system will not allow a duplicate result to be copied into the table.

2 Copied Results

When you are finished entering and reviewing results, click here →

4

Copy	Edit	NSN	Trainee	Unit Standard	Version	Description	Assessor	Provider	Result Date	Delete
		3231684	Suzanne Connor	23386	3	Support a person to meet personal care needs in an aged care, health, or disability context : Version = 3	Jill Havens		04/04/2016	
		115235760	Andrew Bunn	23386	3	Support a person to meet personal care needs in an aged care, health, or disability context : Version = 3	Jill Havens		11/04/2016	
		110882208	Pauline Ruff	23386	3	Support a person to meet personal care needs in an aged care, health, or disability context : Version = 3	Jill Havens		11/04/2016	

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View Results Entered

This page is for viewing results that have your name as the assessor. This includes results entered by you, by another iportal user, from Aka Toi or internally by Careerforce.

This page displays all results including any that have not been accepted due to a reason detailed below.

The result's **status** reflects our internal system status as it performs a series of checks. The states are:

- **Pending Result** – still being processed by the system, click **Apply** again to refresh the selection.
- **To be confirmed** – you are a new assessor or have recently applied for a scope increase, results coming in are flagged as moderation is required. The assessor admin team will be in touch.
- **Outside of Assessor Scope** - outside of assessor scope and/or assessor registration period.
- **On Hold** - date of assessment is greater than 9 months - a Client Service representative will be in touch with you to check that the assessment date is correct.
- **Accepted** – result has met all requirements or unit standard is previously completed.

Please note: Unit standard results will NOT appear on a trainee's record until the result is **Accepted**.

Using the filters is optional.

Hint: To quickly see what you just entered, select Assessment Entered = Last 10 Days. Click **Show Data** to see results.

View results entered

View results that have been submitted where you are the assessor. This includes results entered by others on your behalf on the iportal and paper results sent to Careerforce.

Unit Standard

Trainee

Assessment Date

OR

Assessment Entered

Enter new result

Code	Trainee	NSN	Date Assessed	Date Entered	Assessor Name	Reported to/from* NZQA	Status	Communicate
28519	Andrew Bunn	115235760	15/02/2016	22/03/2016	Jill Havens		Outside Assessor Scope	
00018	Andrew Bunn	115235760	14/03/2016	21/03/2016	Jill Havens		Accepted	

Trainee Record

The trainee record list will show trainees that have enrolled at your workplaces and/or that are currently assigned to you as a contracted assessor. Contracted trainees who complete or terminate their training will no longer appear.

The trainee record page displays **current trainees plus completed or terminated trainees over the last 14 months.**

Qualifications that the trainee has enrolled in with Careerforce are displayed.

The completed date will not be populated unless the qualification has been awarded by the NZQA. Certificates can take 3-5 weeks after their 'first issued' date to arrive.

Click the **Report** button to show the unit standards that are already completed OR intending to be done. Unit standards achieved prior to a training start date will appear on the report.

Unit Standards are either completed or intending to be completed on a current enrolment(s). Results are submitted to the NZQA on a weekly basis.

Note: A trainee's NZQA record of learning will only become visible in iportal 7 days after the trainee's enrolment has been processed by Careerforce.

Trainee record

View current trainees plus completed or terminated over the last 14 months

Trainee

[Show data](#)

This view shows current trainee details plus completed or terminated trainees details over the last 14 months.

First Name	Middle Name	Last Name ↑	Preferred Name	NSN	Alternate Last Name	Communicate

Qualifications

Current qualifications and any qualifications that the trainee has completed through Careerforce related to logged in user.

Qualification ↑	Level	Version	Completed Date	Certificate First Issued	Report
2469 : New Zealand Certificate in Health and Wellbeing (Level 2)	2	1	31/10/2017	13/11/2017	Report

Page 1 of 1 View 1 - 1 of 1

Unit Standards

Incomplete units are units selected as part of a training plan that are not yet completed.

Completed units are units with results reported to Careerforce or those imported from the NZQA.

Results reported to Careerforce are submitted weekly to the NZQA.

Results imported from the NZQA have an asterisk * beside the Reported to/from NZQA date.

Display All units Incomplete Units Completed Units

Unit Code ↑	Version	Description	Level	Credits	Assessment Date	Reported to/from* NZQA
00062	4	Maintain personal presentation and a positive attitude in a workplace involving customer contact	2	2	30/06/2006	04/09/2017*
00064	4	Perform calculations for a specified workplace	1	2	18/08/2006	04/09/2017*
00167	4	Practise food safety methods in a food business under supervision	2	4	08/09/2006	04/09/2017*

Contact Us

There will be 2 types of forms available for assessors under the **Contact Us** section.

You can either click the **General Enquiry** or click on **Submit a new training agreement** in the left menu.

Enter a subject, select a trainee if applicable and enter your message. Attach files if necessary.

The screenshot shows the 'General Enquiry' form in the iportal. The left-hand navigation menu includes the following items: 'Assessor', 'Assessor scope & Assessor guides', 'Assessor workplaces', 'Assigned trainees', 'Enter results', 'View results entered', 'Trainee record', 'Change role', 'Contact Us', 'General Enquiry', 'Submit a new Training Agreement', 'Change Password', and 'Sign Out'. The 'General Enquiry' and 'Submit a new Training Agreement' items are highlighted with red boxes. The main content area is titled 'General Enquiry' and includes a note: 'Please note: all fields marked * must be completed'. The form fields are: 'Subject *' (text input), 'Trainee' (dropdown menu with 'Select a trainee' selected), 'Message *' (text area), and 'Attachments' (file upload area with 'Choose Files' button and 'No file chosen' text). At the bottom of the form are 'Send' and 'Cancel' buttons.

Click **Send**.

*** The file attachment size should not be exceeded by **20MB**.

A copy of your request will be emailed to you.

Changing Roles

If you have more than one role available to you, you can switch to the other role by going to **Change Role** or from the **iportal** homepage.

Select the role you wish to use, and the left menu options will automatically change based on the role that you choose.

iportal

Assessor

- Assessor scope & Assessor guides
- Assessor workplaces
- Assigned trainees
- Enter results
- View results entered

Trainee record

Change role

Contact Us

- General Enquiry
- Submit a new Training Agreement

Change Password

Sign Out

iportal Role Selection

Please select the role you would like to use.

Assessor

Assessor

Employer Admin

Date	Category	
23/01/2020	iPortal Help	What do I do whe
05/06/2019	Getting it done online	Terminating a Tra
05/06/2019	Getting it done online	Submit a new Tra
05/06/2019	Getting it done online	Request to place
05/06/2019	Help	What to do if I en
04/06/2019	Instructions	How to Search fo
04/06/2019	Instructions	Entering results o
05/06/2017	FAQ	Why can't I see a

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Logging out

For security and trainee privacy reasons, it is important to log out of the iportal when you have finished your session.

Click **Sign Out** in the menu.
Click **Yes** when you receive the prompt to close the window.

