

TestMeOnline functional data sheet

TestMeOnline is an innovative online testing and training and competency (T&C) monitoring solution for the retail financial services market. TestMeOnline provides you with the ability to; test and monitor initial and ongoing competence, manage learning, and monitor supervisory activities, through automated processes, robust procedures and in-built audit.

administrator user functionality

- **user administration:**
 - create, edit and delete users
 - allocate user names and passwords
 - define access levels for users
- **user group management:**
 - create groups to match the organisational structure
 - allocate members to groups
 - filter performance data by user group
- **question bank:** maintained and updated on a quarterly basis by The Coaching Platform, part of Focus Solutions Group, who are accredited by the Financial Services Skills Council (FSSC) for excellence in training. Modules available are:

level 2	level 3	level 4
pensions administration	UK regulation	personal tax
life office administration	anti money laundering	trusts
	data protection	business planning
	investments	investment principles
	protection	pension income options
	retirement planning	pension funding options
	mortgages	
	equity release	
	general insurance	
- **question manager:** filter question banks to show learning areas and sub sections applicable to each subject heading. In addition build your own organisation specific questions with automated version control.
- **assessment management:** create fixed or random assessments using both supplied and organisation specific questions. Set rules for assessments including:
 - timings and expiry date
 - number of questions, pass mark and weightings
 - auto reset on fail as well as timeframe for re-testing
 - directed reading material
- **competence manager:** group developmental and mandatory activities together to form competency tracks that must be completed in order to achieve or maintain competence. Tracks can be structured to ensure that activities take place sequentially.
- **job roles:** set up and manage organisational roles and attach relevant competencies.
- **proficiency sign off:** tracks and activities can be set so that they require a proficiency signature from a relevant individual.
- **training content manager:**
 - house firm specific and generic training material which can be made available to individuals or groups
 - create new pages which can be accessed in the form of e-learning modules
 - automatically upload SCORM wrapped e-learning courses
 - organise training content into courses or modules

- **classroom courses:** manage all aspects of running classroom courses including:
 - set up and track classroom courses and other relevant events
 - define minimum and maximum course sizes with built-in notifications regarding course allocation and sign off
 - track instructor and room availability as well as equipment required
- **allocation of training events:** allocate tests or training to individual users or groups, including:
 - optionally auto re-allocate training on failure or after a set time period
 - send e-mail notifications on assignment of events
- **reporting:** produce performance summaries for individuals and groups including:
 - export reports to excel for printing
 - automatically route reports to specified individuals at defined intervals

supervisor user functionality

- **access T&C logs for your team:** retrieve a complete record of all assigned and self-recorded development undertaken by individuals.
- **assign activities:** allocate tests, training and other developmental activities and observations to members of your team, by individual or by group.
- **record activities:** log activities undertaken with your team such as 1:1's and observations as well as upload associated documentation.
- **view reports:** gain 24 hour access to team reports.
- **dashboard:** obtain an instant overview through the supervisor dashboard of the percentage of mandatory activities completed or outstanding for your team.

standard user functionality

- **activities:** view details of activities that have been allocated to you including:
 - tests
 - training
 - 1:1's
 - observations
 - action plans
 - continuous professional development (CPD)
- **completed activities:** review details of your finished tasks through the user homepage.
- **record details of completed CPD:** log CPD activities undertaken and upload associated documentation.
- **forums:** access forums allocated by the administrator in order to collaborate with other individuals in your organisation.
- **self register:** sign up for training or tests that are available through the course catalogue.