

Apprenticeship Management Suite – 07/09/2026

Release Notes

This page contains details of new and amended functionality included in the software update deployed on **07/09/2026**.

Microsoft Teams Integration – ePortfolio

What have we done?

An integration between Microsoft Teams and Apprenticeship Management has been delivered to support Progress Reviews.

Why have we done this?

We appreciate that many organisations use Microsoft Teams as their collaboration app of choice, so this integration will better serve those who wish to host Progress Reviews over Teams.

How will you benefit?

The integration allows Progress Reviews to be booked from within Apprenticeship Management as Microsoft Teams meetings, removing duplication of effort from having to book the review through Teams separately from ePortfolio.

Details of the change

Microsoft Teams is an additional purchasable module within Apprenticeship Management. Please contact your Account Manager for further information regarding costs for your organisation.

To configure the Microsoft Teams integration, users require the following licences in Apprenticeship Management:

- Apprenticeship Management Administrator Module
- Education – Microsoft Teams

Please contact the Support Team if you need Master Admin users from your Smart Assessor site to be automatically allocated to these licences.

Admins in Apprenticeship Management can access the 'Microsoft Teams Settings' menu option. This directs Admins to a page where the configured tenant can be linked to the organisation's Apprenticeship Management site. Full guidance for [setting up the Microsoft Teams Integration is available here](#).

Once the integration has been configured, Assessors can choose to create new Progress Review meetings in Apprenticeship Management as Teams Meetings. Doing so will automatically send notifications to invitees containing the link to the Teams Meeting that can be added to external

calendar apps, such as Outlook. Teams Meetings can also be launched directly from Apprenticeship Management's calendar and Progress Review records.

Progress Reviews - ePortfolio

What have we done?

A new end-to-end workflow has been delivered to support planning, delivering and completing Progress Reviews.

Why have we done this?

To support a key compliance process in Apprenticeship Delivery without depending on the Smart Assessor application.

How will you benefit?

The new workflow simplifies and streamlines each stage of a Progress Review, providing clarity to all parties where a learner is in their progress, what was discussed, what actions have been agreed and signing the review to completion.

Details of the change

Please note that this new Progress Reviews workflow is supported by a dedicated data architecture within Apprenticeship Management. Therefore, no Formal Review sessions from Smart Assessor are surfaced in this new workflow and no Progress Reviews booked in Apprenticeship Management will surface in Smart Assessor.

Detailed guidance for the end-to-end Progress Reviews workflow [can be found here](#).

Key features of the Progress Reviews workflow in Apprenticeship Management are:

- A clear view for Assessors, Learners and Employers to view a learner's upcoming and previous Progress Reviews. Reviews also surface in Apprenticeship Management's calendar.
- Assessors can invite other Assessors, contacts from the learner's Employer or external contacts (for users who do not have an Identity account) to attend the Progress Review. All invited parties with an Identity account and permission to the Learner Profile can access the dedicated Review Record simultaneously.
- The Review Record surfaces Off-The-Job and Evidence data automatically to contextualise the learner's progress.
- Notes can be captured directly within the Review Record and automatically save, ensuring users don't lose data by forgetting to save.
- Where existing exports of Forms are needed to support the discussion, the Review Record allows for attachments to be uploaded.
- Any follow-up tasks that are agreed with the learner during the discussion can be captured in the Review Record. These tasks surface in existing To Do lists across Apprenticeship Management and automatically track from Progress Review to Progress Review.
- The Review Record allows for the capturing of the Assessor's written summary of the review discussion, and it automatically saves, ensuring the summary data is not lost by forgetting to save.

- The Assessor must lock the Review Record once they are satisfied with its contents to initiate the capturing of signatures. Outstanding signatures are automatically populated into existing To Do lists across Apprenticeship Management.
- Admin users have access to a Progress Review report in CSV format, to view all Progress Review data from within Apprenticeship Management.