

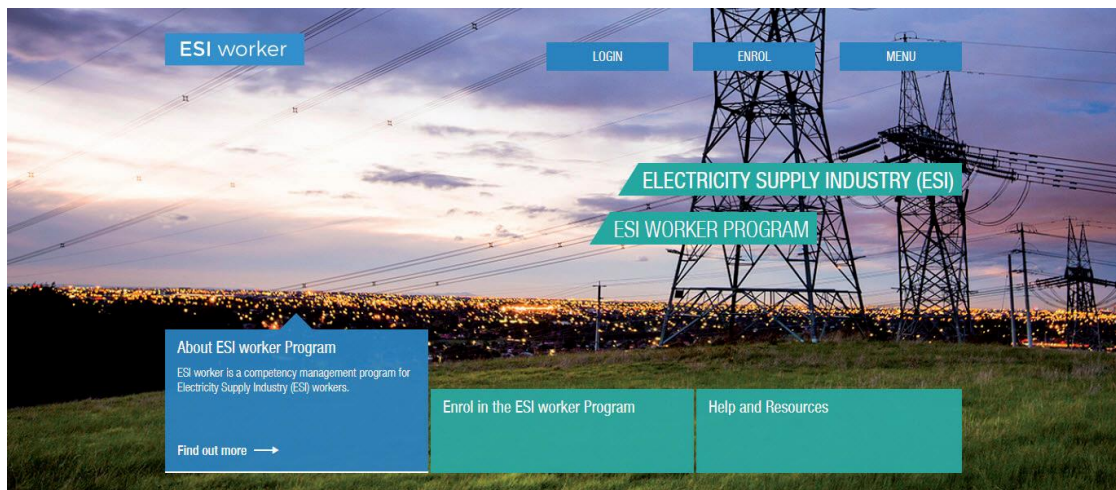
# User Guide

## Trainer's Portal

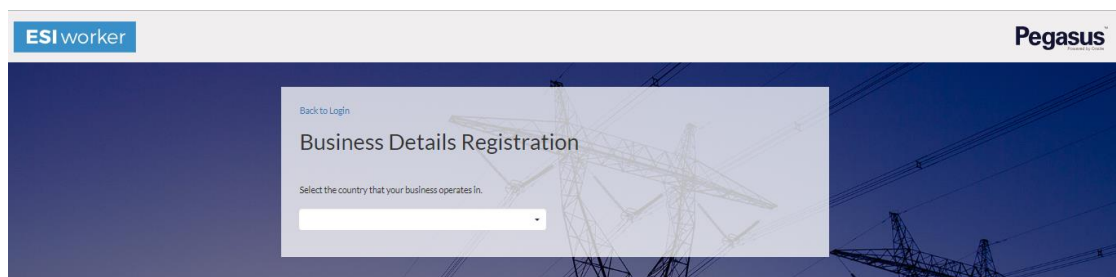
### STEP ONE | Register for the ESI worker Portal

To access the ESI worker Trainers Portal, you must hold a current ESI worker card.

To register for the ESI worker Trainers Portal, go to <http://www.esiworker.com.au> and click on the Enrol button in the top menu bar.

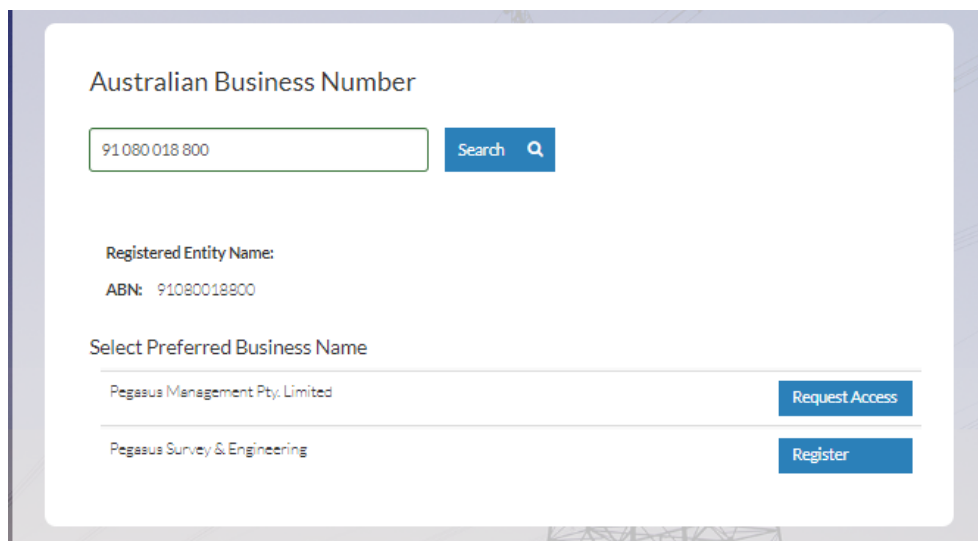


On the Business Details Registration page, select the country that your business operates in from the drop down.



Enter your ABN and click on the Search button.

Alongside the preferred business name, click on the Request Access button.



Australian Business Number

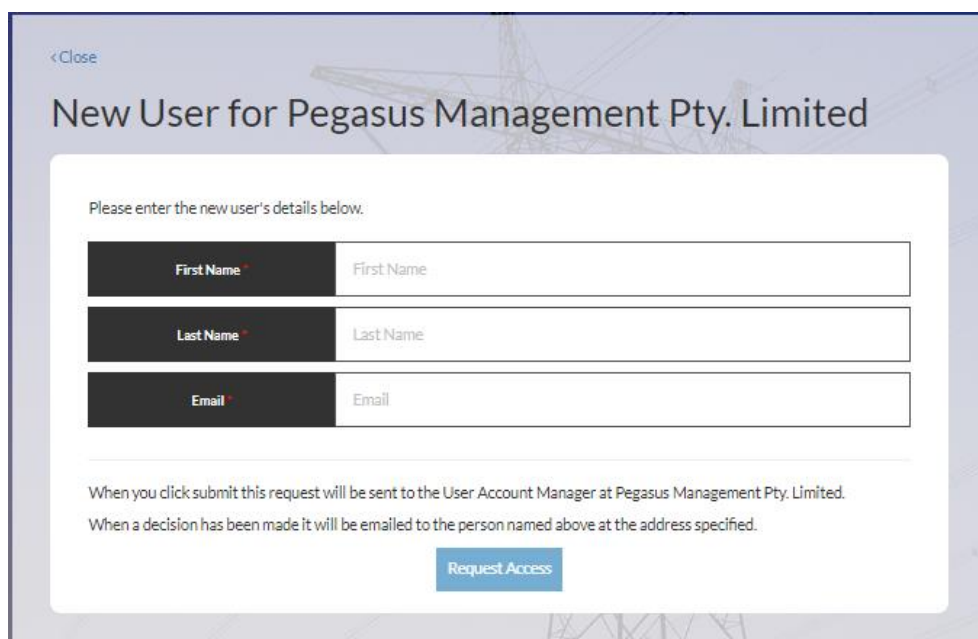
91080 018 800

Registered Entity Name:  
ABN: 91080018800

Select Preferred Business Name

Pegasus Management Pty. Limited	<input type="button" value="Request Access"/>
Pegasus Survey & Engineering	<input type="button" value="Register"/>

Enter your first name, last name and email address and select Request Access.



< Close

## New User for Pegasus Management Pty. Limited

Please enter the new user's details below.

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Email *	<input type="text"/>

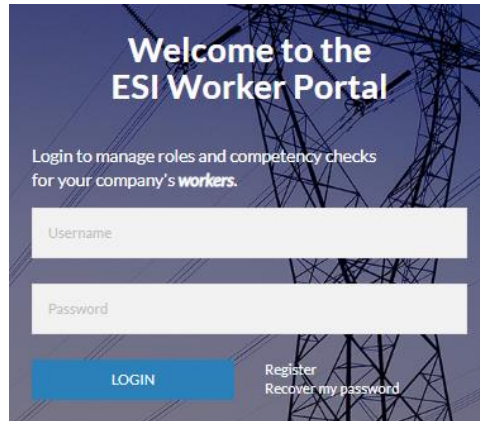
When you click submit this request will be sent to the User Account Manager at Pegasus Management Pty. Limited.  
When a decision has been made it will be emailed to the person named above at the address specified.

An email will be sent to your company administrator who will grant your access.

Once granted, you will receive an email from [onsitetrackeasy@pegasus.net.au](mailto:onsitetrackeasy@pegasus.net.au) with your login details.

## STEP TWO | Log into the ESI worker Portal

Log into the ESI worker portal using the login credentials you were emailed.

The image shows the login page for the ESI Worker Portal. It has a dark blue background with a faint image of power lines. The text "Welcome to the ESI Worker Portal" is at the top. Below it, a message says "Login to manage roles and competency checks for your company's workers." There are two input fields: "Username" and "Password". A blue "LOGIN" button is at the bottom left. To the right of the button, there are links for "Register" and "Recover my password".

Welcome to the  
ESI Worker Portal

Login to manage roles and competency checks  
for your company's **workers**.

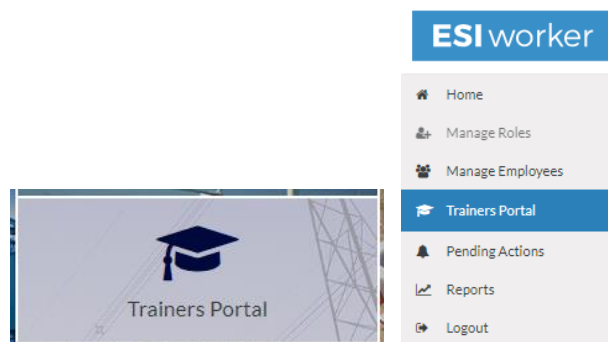
Username

Password

LOGIN

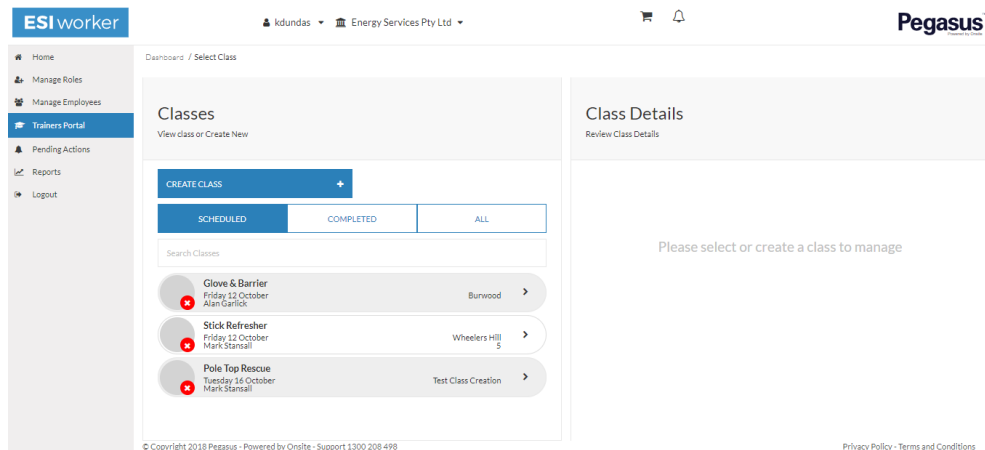
Register  
Recover my password

Click on the Trainers Portal tile or select Trainers Portal from the menu on the left



## STEP THREE | Create Classes

This is the Trainer's Portal Dashboard where you can either create and edit scheduled classes or view completed classes.



To create a new class, click on the Create Class button;

CREATE CLASS +

Enter the details of the class such as the class name, trainer, venue, date, time and duration. Capacity is the number of attendees in the class. All mandatory fields are indicated with a red asterisk.

**Note:** A system rule has been included to prevent you from completing future dated classes. If you are creating a class with today's date and you intend to complete the class today, you will need to enter the Time and Duration (ie 8.00am start with a 3 hour duration) so the end time of the class will not be future dated.

### Class Details

Review Class Details

Name *	First Aid & CPR Refresher		
Trainer *	Scott Parkinson		
Venue *	426 King Street, Newcastle NSW 2300		
Date *	31/10/2018		
Time	07:00 am		
Duration *	2	Hour	▼
Capacity	5		

Save

SAVE & ADD COMPETENCIES

To continue with the creation of the class, click on the Save & Add Competencies button.

To Save the class details for later, click on the Save button. The class will be added to the list of the scheduled classes on the left of the screen.

### Classes

View class or Create New

CREATE CLASS +

SCHEDULED

COMPLETED

ALL

Search Classes

Glove & Barrier

Friday 12 October

Alan Garlick

Burwood >

Stick Refresher

Friday 12 October

Mark Stansall

Wheeler's Hill 5 >

## STEP FOUR | Adding Competencies

You can search the list of competencies by scrolling or by entering the name or partial name in the search box. To select a competency, click on the Include button.

### Note:

Competencies **with** a unit code are for **initial training** only. When deemed competent, the RTO will issue a Statement of Attainment to the employer and this SOA will need to be uploaded against the workers profile through the ESI worker portal by the company administrator.

Competencies **without** a unit code have a frequency attached E.G. 1 or 3 years. These competencies will automatically produce a certificate that will be captured against the individual's worker profile when they are deemed competent.

### Important:

**Initial Training** – select the Unit of competency **with** a code **AND** the competency **without** the code (as this will trigger the refresher training frequency in the ESI worker system).

**Refresher Training** – only select the competency **without** the code.

Competencies List The Competencies selected for this class	Initial Training	Competencies List The Competencies selected for this class	Refresher Training
<div><div><input checked="" type="radio"/></div><div>Provide First Aid In An ESI Environment</div><div>Remove</div></div> <div><div><input checked="" type="radio"/></div><div>Provide First Aid In An ESI Environment UETDRRF10B</div><div>Remove</div></div>		<div><div><input checked="" type="radio"/></div><div>Provide First Aid In An ESI Environment</div><div>Remove</div></div>	
<div>Save</div> <div>SAVE &amp; ADD ATTENDEES</div>		<div>Save</div> <div>SAVE &amp; ADD ATTENDEES</div>	

If an incorrect competency has been selected, click on the Remove button and it will be removed from the Competencies List.

## Competencies List

The Competencies selected for this class

- ☒ Provide Cardiopulmonary Resuscitation [Remove](#)
- ☒ Provide First Aid In An ESI Environment [Remove](#)

Save

SAVE & ADD ATTENDEES

Once you've selected all of the competencies that will be delivered as part of the class, you can click on the Save button to save it for later, or you can click on the Save & Add Attendees button to continue with the creation of the class.

## STEP FIVE | Adding Attendees

There are two ways to add attendees to a class, you can enter the first and last name of the attendee along with their worker ID number or date of birth manually or you can scan their worker card.

### Find Students

Search for a student to attend this course


SCAN PERSON

First Name

Last Name

ID

SEARCH


 Cardholder Name  
Company Name


Attend

Back to Selected Competencies

### Scan Person

Scan a persons card to search for them



 Cardholder Name  
Company Name

Attend


Cancel

After confirming the person is correct, click on the Attend button and they will appear on the right side of the screen in the Attendees List.


If an incorrect person has been selected, click on the Remove button and they will be removed from the Attendees List.

### Attendees List


The persons in this list are attending a class

 Cardholder Name  
Company Name


Remove

 Cardholder Name  
Company Name


Remove

 Cardholder Name  
Company Name


Remove

 Cardholder Name  
Company Name

Remove

 Cardholder Name  
Company Name

Remove

 Cardholder Name  
Company Name

Remove

ATTENDANCE

Once the class is complete, click on the Attendance button to begin passing/not-passing each of the attendees.

**Pegasus**<sup>TM</sup>  
Powered by Onsite



## STEP SIX | Resulting

The Attendance list displaying on the right is now split by competency. Under the first competency, select the first person.

If the individual was in attendance and passed the competency, set the Attended field to Yes and the Competent field to Yes and click on the Save & Next button to move through the list.

Attendance

Configure the attendance and competency for persons per course

Cardholder Name

Company Name

Competency	Provide cardiopulmonary resuscitation
Attended	Yes
Competent	Yes

Remove

SAVE & NEXT

If they have not passed due to non-attendance, set the Attended field to No and select a reason that most closely matches the reason for non-attendance. If the reasons available are not suitable, select Other and type in the reason.

## Attendance

Configure the attendance and competency for persons per course

Cardholder Name  
Company Name

Competency	Provide cardiopulmonary resuscitation
Attended *	No
Competent *	No
Reason *	Withdrew - no reason

Remove

SAVE & NEXT

If they attended but have been deemed Not-Competent, set the Competent field to No and select a reason that most closely matches the reason for non-competence. If the reasons available are not suitable, select Other and type in the reason.

## Attendance

Configure the attendance and competency for persons per course

Cardholder Name  
Company Name

Competency	Provide cardiopulmonary resuscitation
Attended *	Yes
Competent *	No
Reason *	Requires more on job experience

Remove

SAVE & NEXT

If the individual was not required to attend one of the sessions – meaning that they only needed to be trained in one of the two competencies - you can remove them from the competency that is not required by selecting the Remove button.

Note: removing an attendee is final and cannot be undone.

Attendance

Configure the attendance and competency for persons per course

Blanden, Trevor

Active Tree Services Pty Ltd

Competency	Provide first aid in an ESI environment
Attended	Yes
Competent	Yes

Remove

SAVE & NEXT

As attendees are marked, an icon representing their result will appear alongside their name.

✓	Competent
✗	Not Competent
—	Absent
Does not appear	Was not required

Attendance

Configure the attendance and competency for persons per course

Expand All | Collapse All

PROVIDE CARDIOPULMONARY RESUSCITATION6/6

Cardholder Name

Company Name

✓

Cardholder Name


Company Name

✗

This process must be completed for all attendees and for all competencies that make up the class. When you reach the final attendee, select the Save & View Summary button.

The Training Report Summary is the final step and the last opportunity you have make changes.

Training Report Summary

Tap on a person's course block to update 

	Provide cardiopulmonary resuscitation	Provide first aid in an ESI environment
Cardholder Name Company Name	✓	✓
Cardholder Name Company Name	✓	✓
Cardholder Name Company Name	✓	—
Cardholder Name Company Name	—	✗
Cardholder Name Company Name	✗	
Cardholder Name Company Name	✓	✓

Back to Attendance

SUBMIT

If you need to change the result of an individual, click on the icon alongside their name and in the column of the correct competency, this will take you back to the previous screen. When you have made the change, select the Save & View Summary button.

If you notice that the wrong competency has been included, select the Back to Attendance button, then the Back to Attending Students button and then the Back to Selected Competencies button. Remove the incorrect competency and include the correct one. Select Save & Add Attendees and then Attendance. Here you will be required to mark the attendees against the new competency.

If you notice that an incorrect attendee has been included, select the Back to Attendance button and then the Back to Attending Students button. Remove the incorrect person and include the correct one. Select Attendance and mark the individual in all competencies.

When you are sure that the competencies, attendees and results are correct, click on the Submit button.

*Note: once you select Submit, the results are final and cannot be undone.*

On submitting the results, the following events will occur: -

- The class will be set as Completed
- The individual (if competent) will receive the competency against their Onsite profile and a copy of the certificate will be automatically loaded as an attachment.

- The individual (if competent) will receive an email confirming their competence and a copy of their certificate. They will receive one email per competency.
- The employer will receive the above email as well. They will receive one email per employee, per competency.
- The employer will also receive an email listing their employees who did not attend or were marked as not-competent. They will receive one email per competency.
- The Training Provider will receive an attendance report, listing all attendees and their results. They will receive one email per competency.
-

## STEP SEVEN | Reviewing a Completed Class

Select the Completed button and all the completed classes will be displayed. You can search the list of classes by scrolling or by entering the name or partial name in the search box.

Classes

View class or Create New

CREATE CLASS

SCHEDULED

COMPLETED

ALL

first

First Aid & CPR Refresher

Wednesday 31 October

Scott Parkinson

426 King Street, Newcastle NSW 2300

6 of 5

Select the class you need to review, and the class details will be displayed on the right. To view the Training Report Summary, select the View Summary button.

Class Details

Review Class Details

Name \*

First Aid & CPR Refresher

Trainer \*

Scott Parkinson

Venue \*

426 King Street, Newcastle NSW 2300

Date \*

31/10/2018

Time

7:00 am

Duration \*

2

Hour


Capacity

5

Back to Classes

VIEW SUMMARY

## Training Report Summary

Tap on a person's course block to update 

	Provide cardiopulmonary resuscitation	Provide first aid in an ESI environment
<b>Cardholder Name</b> Company Name	✓	✓
<b>Cardholder Name</b> Company Name	✓	✓
<b>Cardholder Name</b> Company Name	✓	—
<b>Cardholder Name</b> Company Name	—	✗
<b>Cardholder Name</b> Company Name	✗	
<b>Cardholder Name</b> Company Name	✓	✓

[Back to Class](#)

To review the result of an individual, click on the icon alongside their name and in the column of the correct competency, this will take you into the attendance record for the individual.

## Attendance

Configure the attendance and competency for persons per course

**Cardholder Name**  
Company Name

<b>Competency</b>	Provide cardiopulmonary resuscitation
<b>Attended *</b>	Yes ▼
<b>Competent *</b>	No ▼
<b>Reason *</b>	Requires more on job experience ▼

[VIEW SUMMARY](#)

To return to the Training Report Summary, select View Summary.

To return to the Trainer's Portal Dashboard, select Back to Class.