

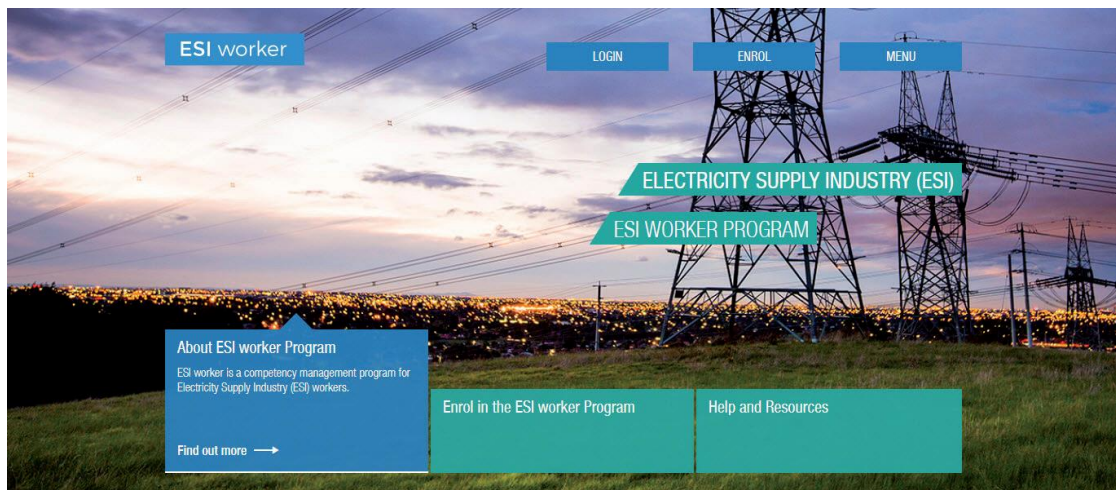
User Guide

Trainer's Portal

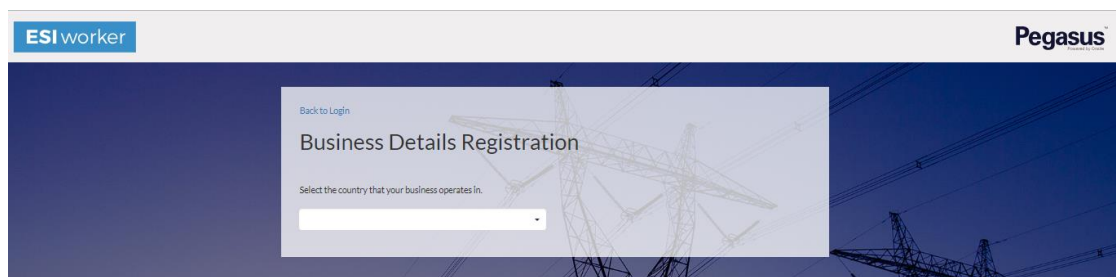
STEP ONE | Register for the ESI worker Portal

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

91080018800 Search

Registered Entity Name:
ABN: 91080018800

Select Preferred Business Name

Pegasus Management Pty. Limited	Request Access
Pegasus Survey & Engineering	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 *	First Name
Last Name *	Last Name
Email *	Email

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.

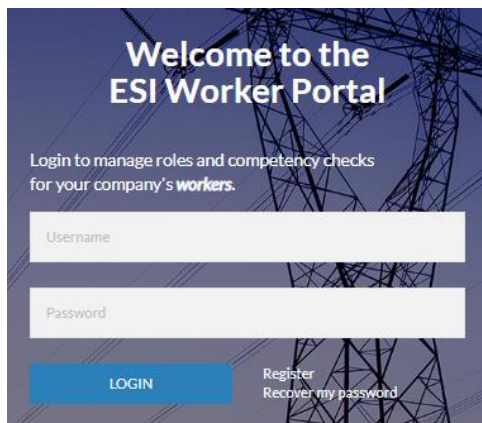
Request Access

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 with your login details.

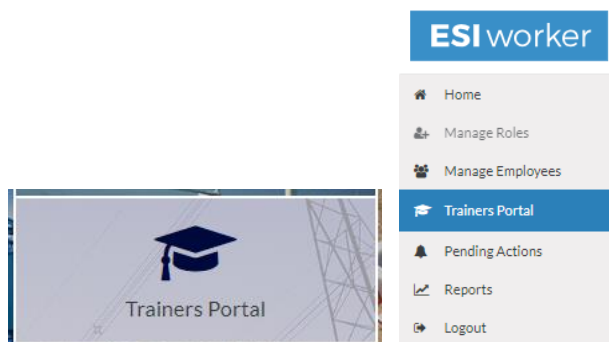
STEP TWO | Log into the ESI worker Portal

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



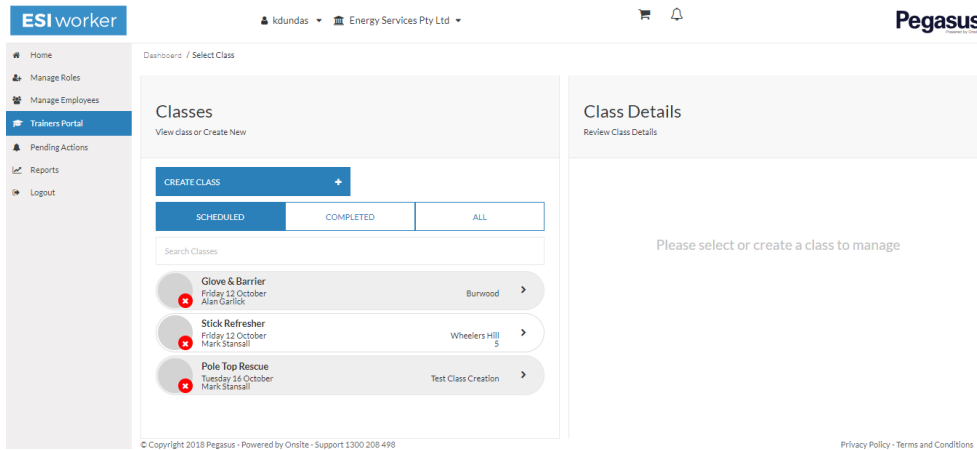
The screenshot shows the login page for the ESI Worker Portal. The background features a dark blue sky with power lines. The text reads: "Welcome to the ESI Worker Portal". Below this, it says "Login to manage roles and competency checks for your company's workers." There are two input fields: "Username" and "Password". A blue "LOGIN" button is positioned below the password field. To the right of the button, there are links for "Register" and "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;



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 Wheelers 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: All competencies **without** a unit code are for refresher training. These competencies will automatically produce a certificate that will be captured against the individual's worker profile once they become competent. All competencies **with** a unit code are for initial training only. Once competent, the RTO will issue a Statement of Attainment and this SoA will need to be uploaded against the workers profile through the ESI worker portal by the company administrator.*

Find Competencies

Find available Competencies for this Class

- Provide First Aid In An ESI Environment UETDRRF10B
- Provide First Aid HLTAID003
- Provide First Aid In An ESI Environment

[Back to Class](#)

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.

The image displays two side-by-side screenshots of a software interface for adding attendees. The left screenshot, titled "Find Students", shows a search form with fields for "First Name", "Last Name", and "ID", a "SEARCH" button, and a "Cardholder Name" field with a company name dropdown and an "Attend" button. The right screenshot, titled "Scan Person", shows a hand holding an "ESI worker" card with a QR code, and a "Cardholder Name" field with a company name dropdown and an "Attend" button. Both screenshots have a footer bar with "Back to Selected Competencies" and "Cancel" buttons.

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.

The image shows a screenshot of the "Attendees List" interface. It features a list of six attendees, each represented by a person icon, a "Cardholder Name" field, a "Company Name" dropdown, and a "Remove" button. At the bottom of the list is a blue bar labeled "ATTENDANCE".

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

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	Withdraw - 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 RESUSCITATION 6/6

 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.

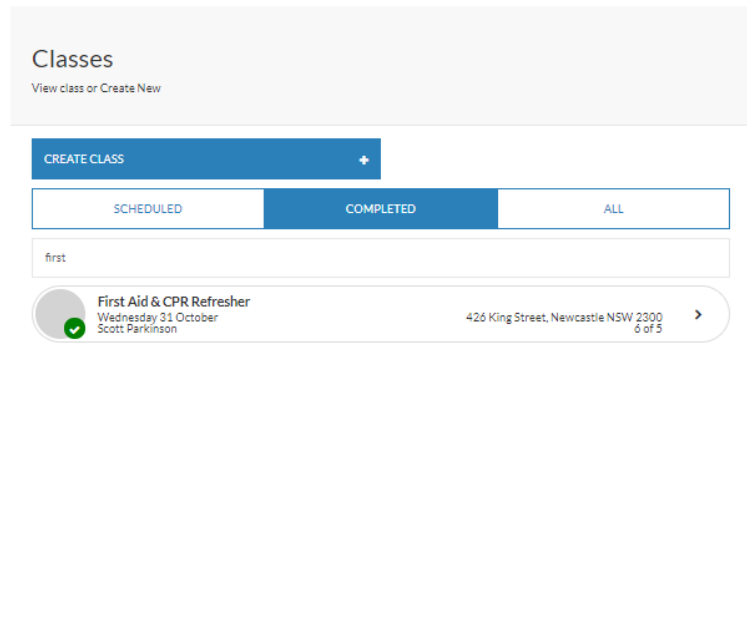
On submitting the results, the following events will occur: -

- 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.
-

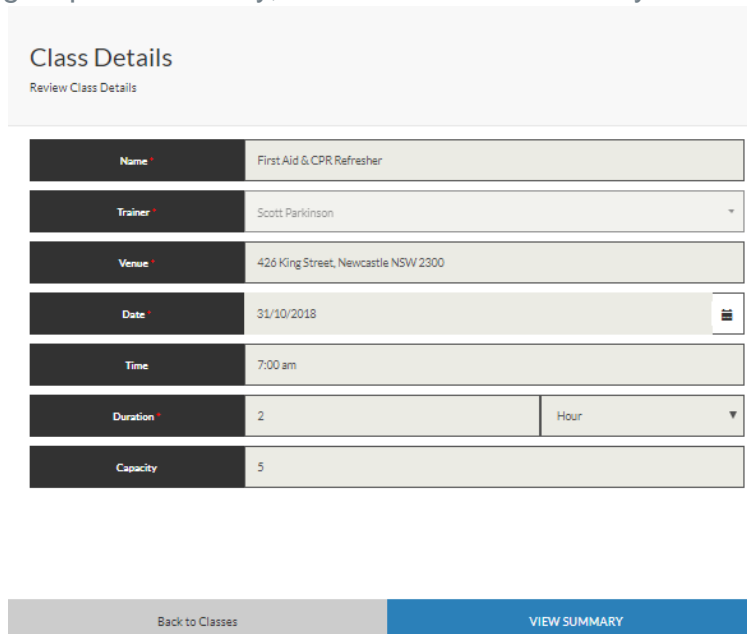
STEP SEVEN | Reviewing a Completed Class

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.



The screenshot shows a web interface for managing classes. At the top, there's a header 'Classes' with a sub-link 'View class or Create New'. Below this is a blue 'CREATE CLASS' button with a plus sign. A filter bar shows three tabs: 'SCHEDULED', 'COMPLETED' (which is selected and highlighted in blue), and 'ALL'. A search box contains the text 'first'. Below the search box, a single class entry is displayed in a rounded card. The card has a green checkmark icon on the left, followed by the class name 'First Aid & CPR Refresher', the date 'Wednesday 31 October', the trainer 'Scott Parkinson', and the venue '426 King Street, Newcastle NSW 2300'. A right arrow indicates more details are available.

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.




The screenshot shows the 'Class Details' page. At the top, there's a header 'Class Details' with a sub-link 'Review Class Details'. Below this is a table with the following information:

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	

At the bottom of the page, there are two buttons: 'Back to Classes' (grey) and 'VIEW SUMMARY' (blue).

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 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

Competency	Provide cardiopulmonary resuscitation
Attended *	Yes ▼
Competent *	No ▼
Reason *	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.