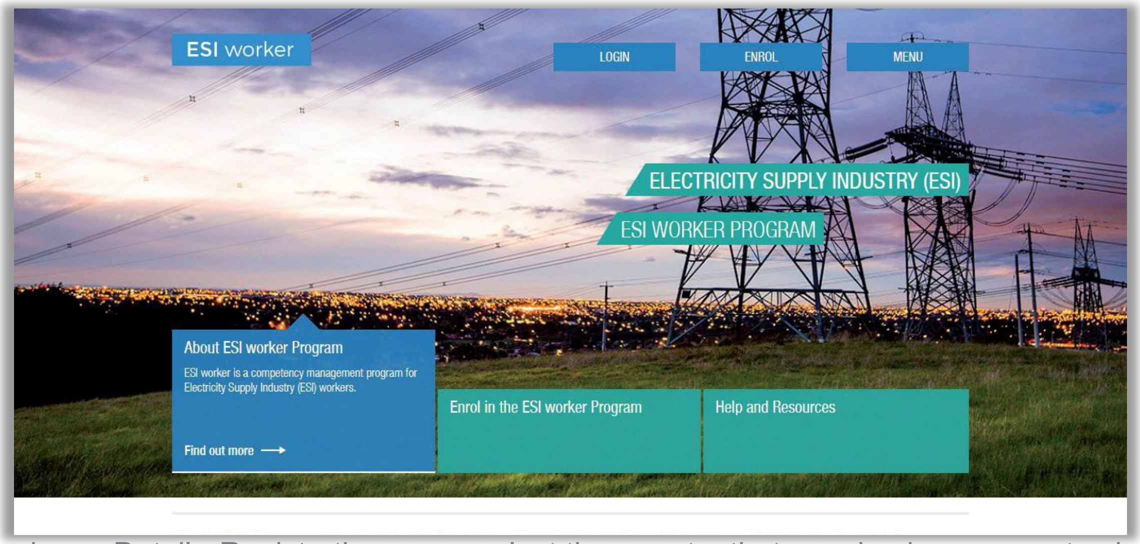
User Guide

Trainer's Portal

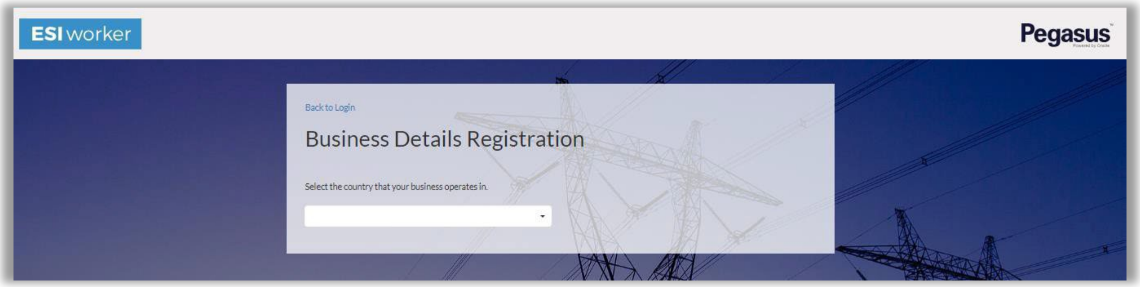
STEP ONE | Register for the ESI worker Portal

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.

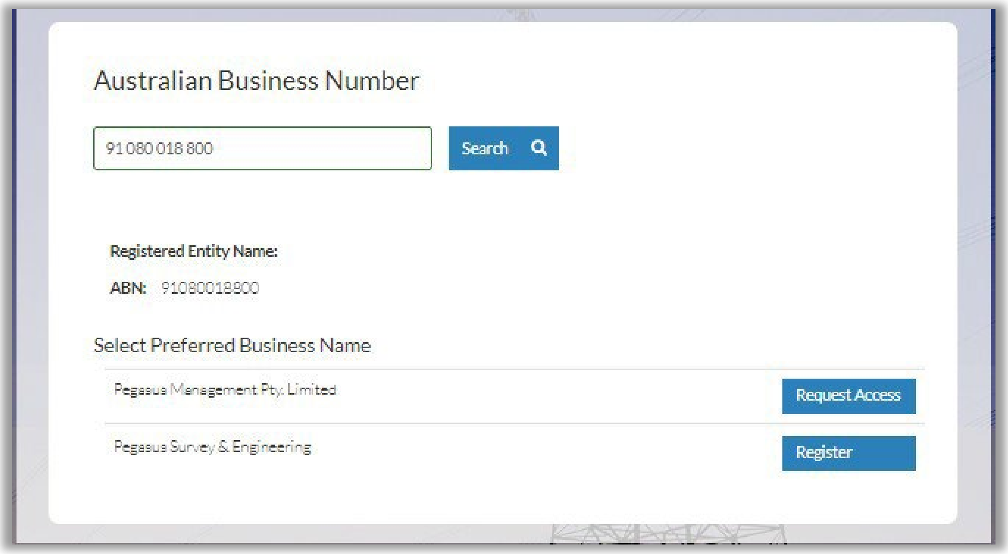


On the Business Details Registration page, select the country that your business operates in from the drop down.

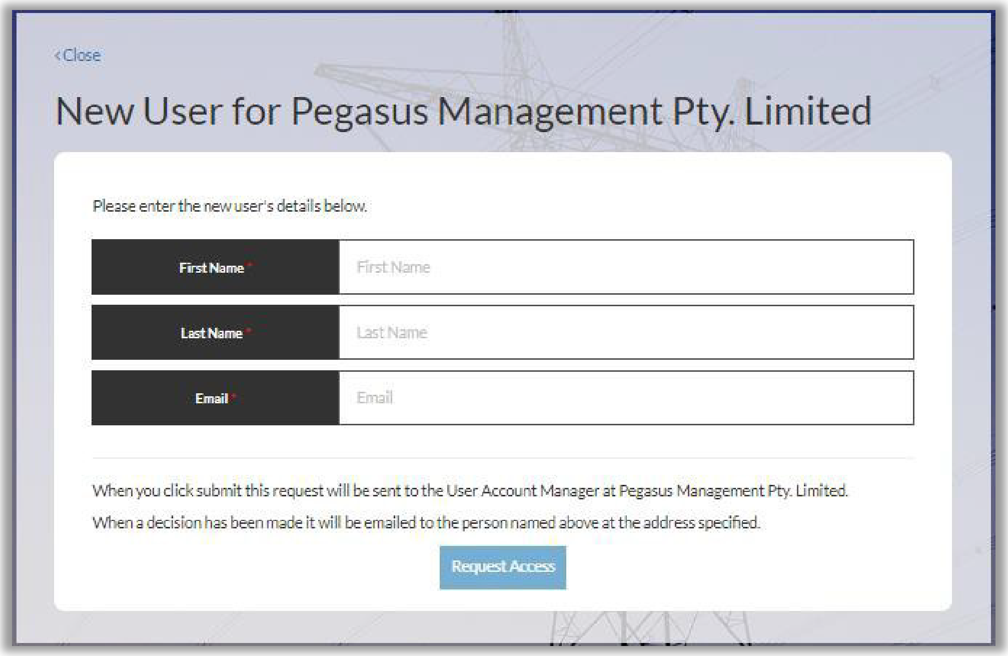


Enter your ABN and click on the Search button.

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



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



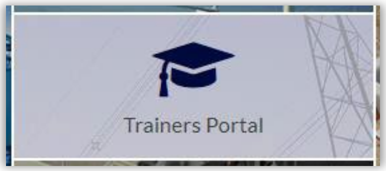
An email will be sent to your company administrator who will grant your access.

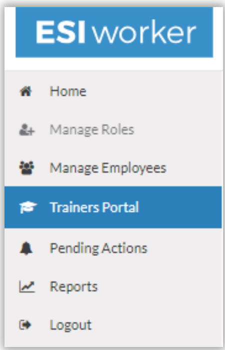
Once granted, your will receive an email from onsitetrackeasy@pegasus.net.au with your login details.

STEP TWO | Log into the ESI worker Portal

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

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



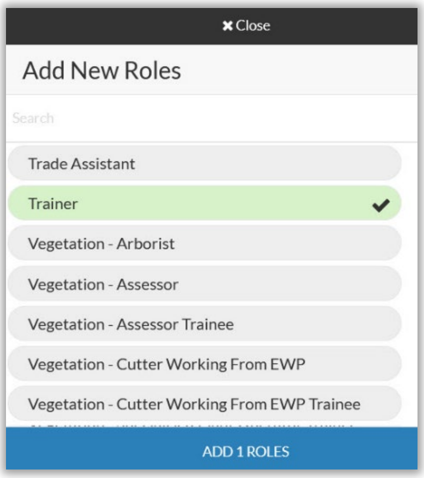


If you do not have the Trainer Portal link, you will need your company administrator to apply for the "Trainers" role in the ESI Portal.

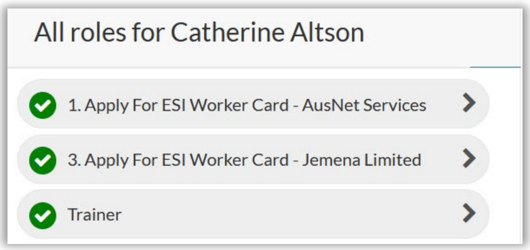
Only Trainers will see the link to manage Training in the Portal.

This role needs to be applied against your profile and be part of your approved roles in the ESI portal.

If you are unsure you can check your roles at any time by reviewing your workers profile, clicking on the Work Roles section



Then reviewing what roles that person has under there. If the Trainer role is missing, it will need to be applied for.



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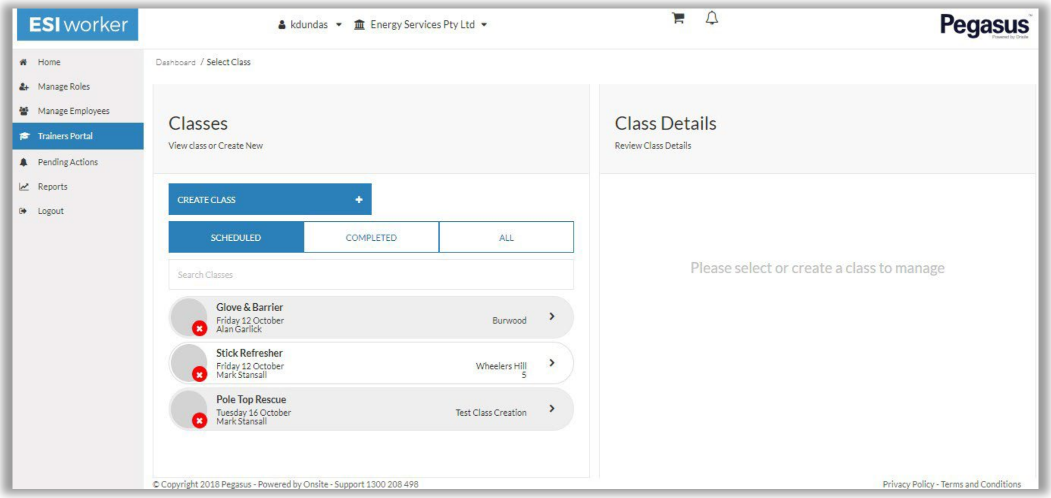
STEP THREE | Create Classes

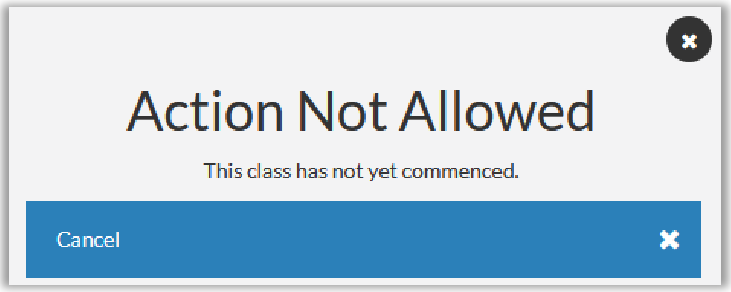
This is the Trainer's Portal Dashboard where you can either create and edit scheduled classes or view completed classes.

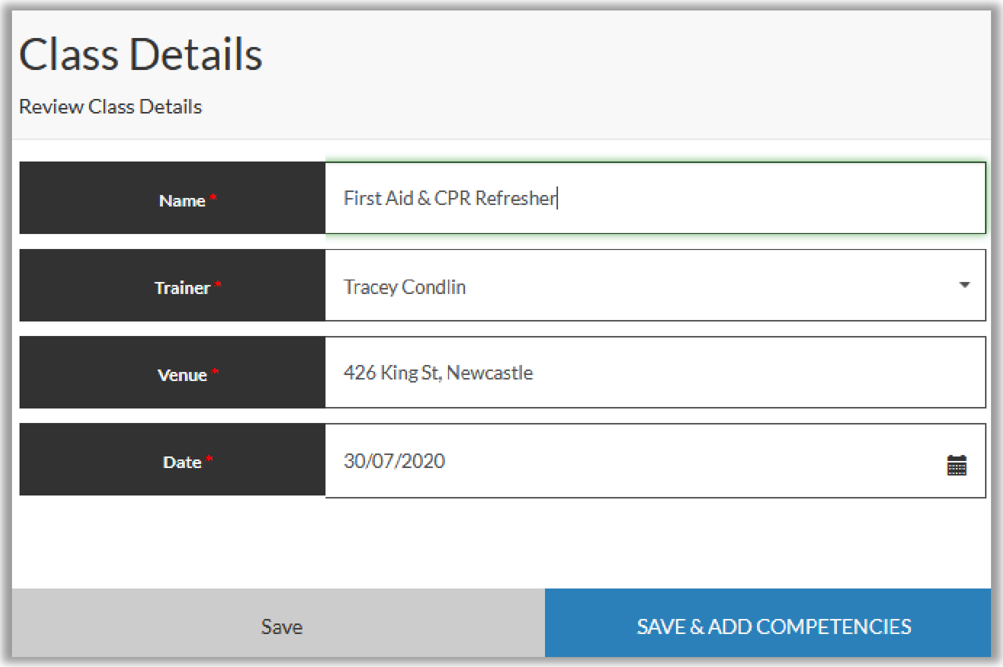


To create a new class, click on the Create Class button;

Enter the details of the class such as the class name, trainer, venue and date. All mandatory fields are indicated with a red asterisk.

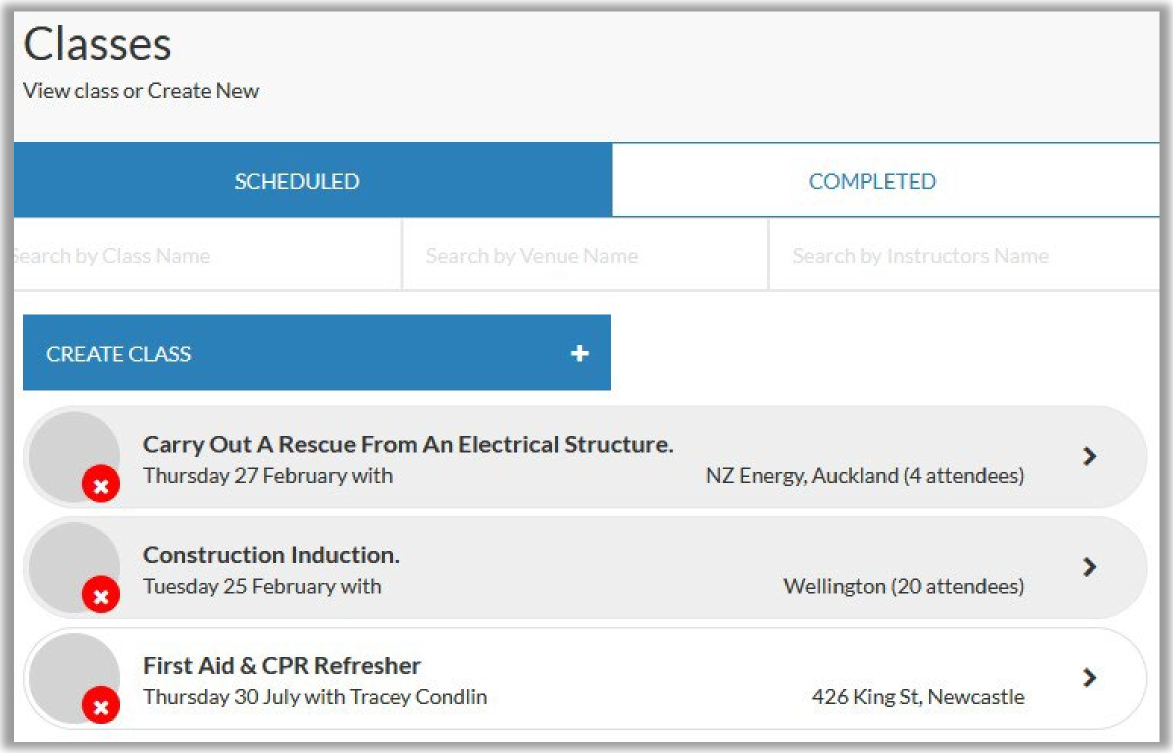
Note: *A system rule has been included to prevent you from completing future dated classes. If you create a class with a future date and you intend to complete the class attendance now for some reason, you will need to:*
- Edit the date to match today's date or,
- Wait until the Future dated class is the current date
Otherwise you will get the below message.





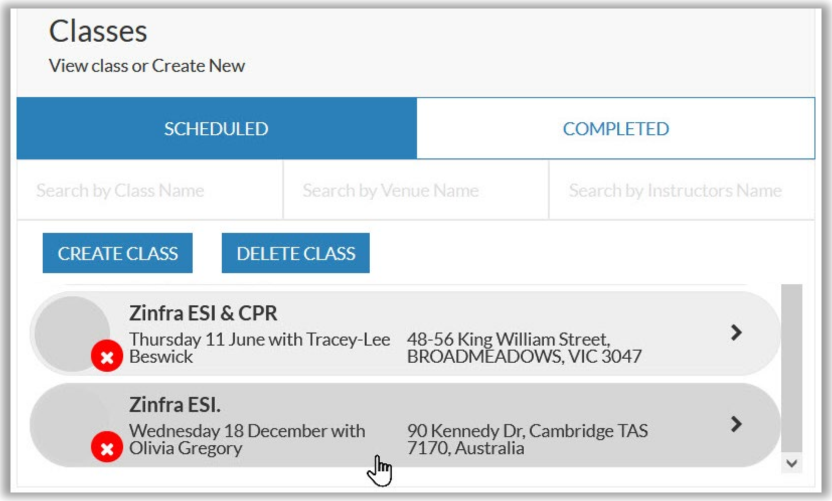
To continue with the creation of the class, click on the Save & Add Competencies button.

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.



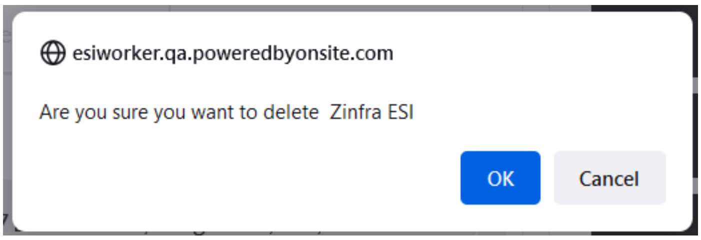
NOTE: DELETING SCHEDULED CLASSES

Scheduled Classes can be deleted if added by accident or if a schedule changes and this is no longer required. The delete button will appear next to the Create Class button, once a class is clicked on.



NOTE: Completed Classes cannot be deleted, only Scheduled Classes.

If you wish to delete a class, first click on the class you wish to remove, then press the “DELETE CLASS” button. The highlighted class name will appear in a new window asking you to confirm.



If you wish to confirm, press OK.
The class will then disappear from the list of scheduled classes.

NOTE: Once a class is deleted, there is no way to bring this class back. You will need to re-create this class if deleted by mistake.

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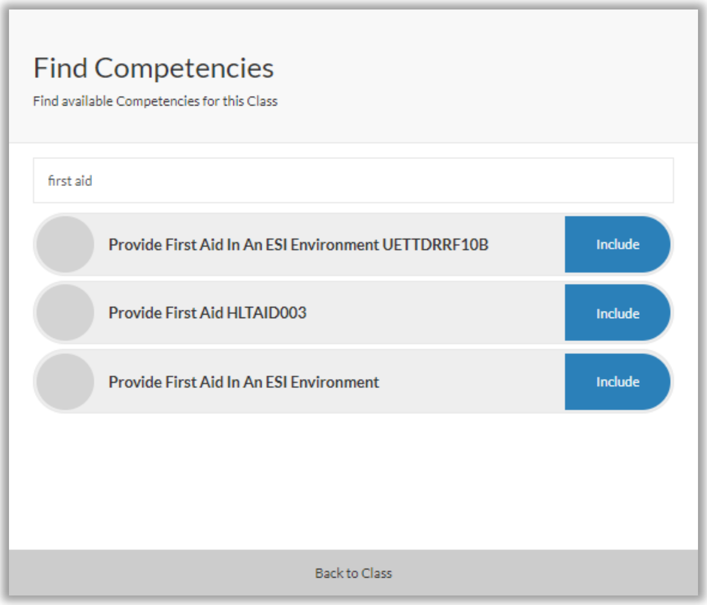
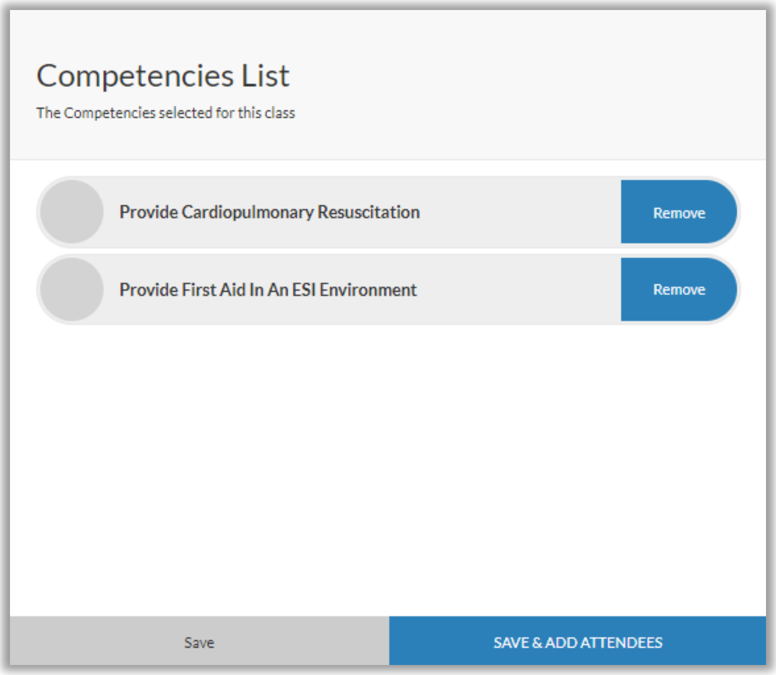
STEP FOUR | Adding Competencies

After Clicking Save & Add competencies, 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.*



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

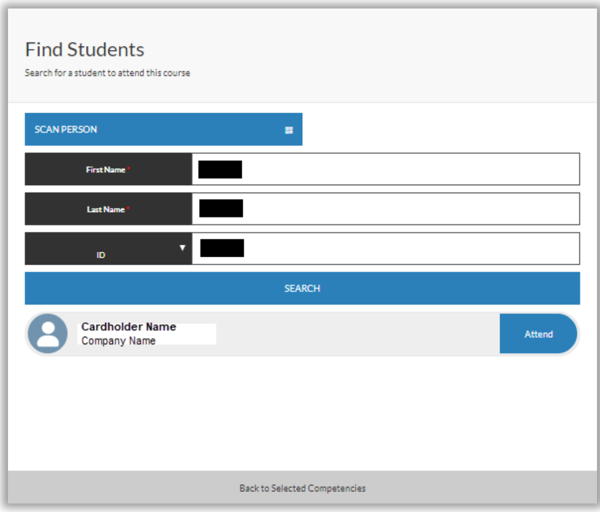


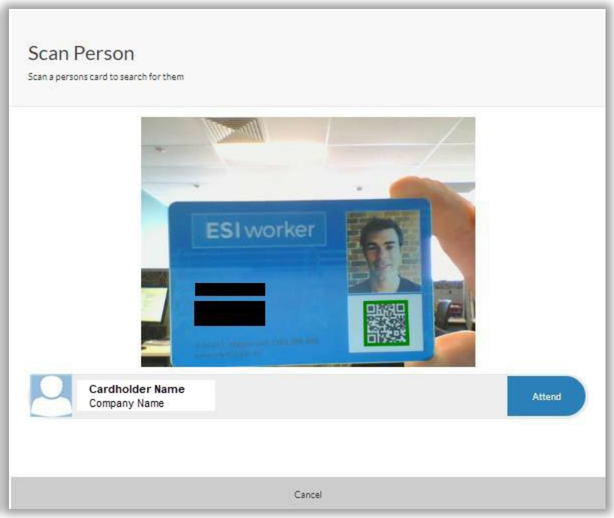
Above: Provide First Aid In An ESI Environment was removed

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.

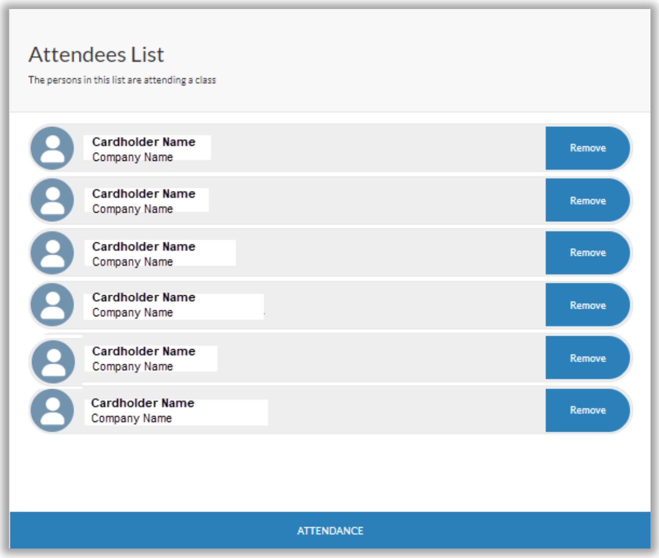
STEP FIVE | Adding Attendees

There are two ways to add attendees to a class, you can either perform a partial search by typing part of the attendees first and last name, along with their DOB and click search to see results, or you can scan their worker card.





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.

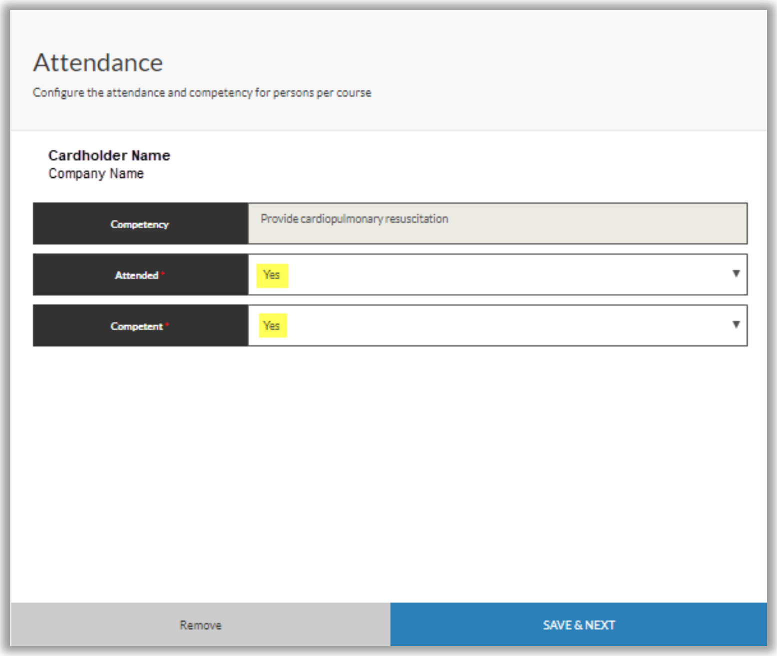


Once the class is complete, click on the Attendance button to begin passing/not-passing each of the attendees.

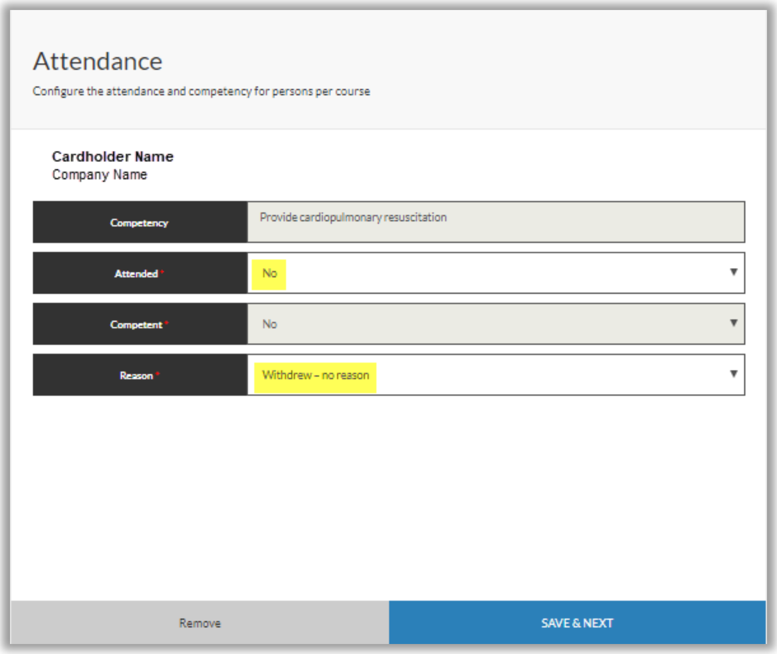
STEP SIX | Resulting

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

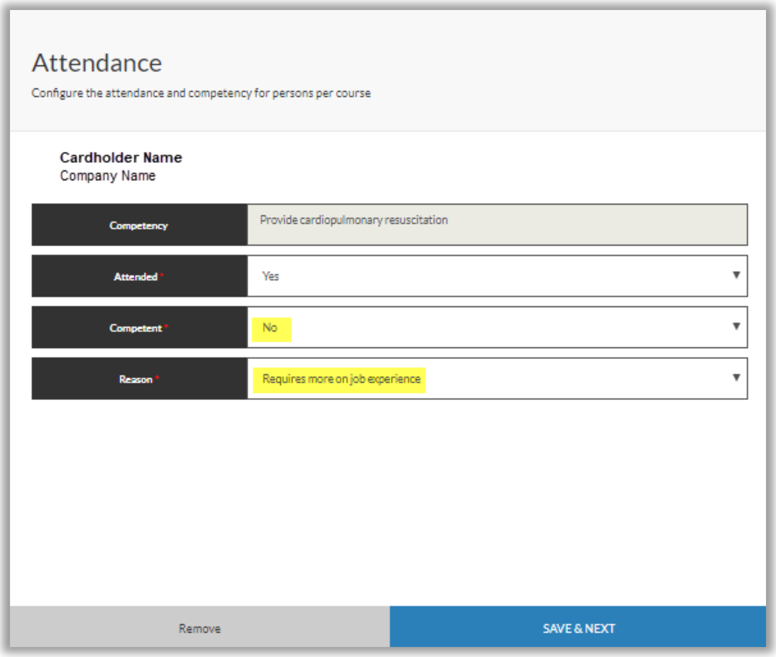
If the individual was in attendance and passed the competency, set the Attended field to Yes and the Competent field to Yes and click on the Save & Next button to move through the list.



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.



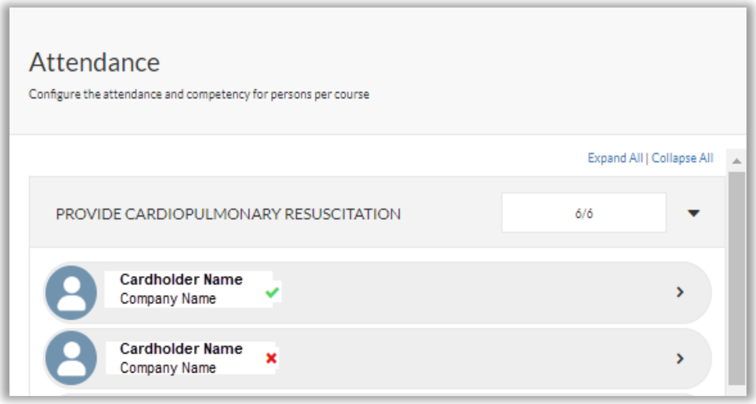
If they attended but have been deemed Not-Competent, set the Competent field to No and select a reason that most closely matches the reason for non-competence. If the reasons available are not suitable, select Other and type in the reason.



If the individual was not required/did not attend one of the sessions – meaning that they only needed to be trained in one of the two competencies - you should mark them as not competent and supply a relevant reason.

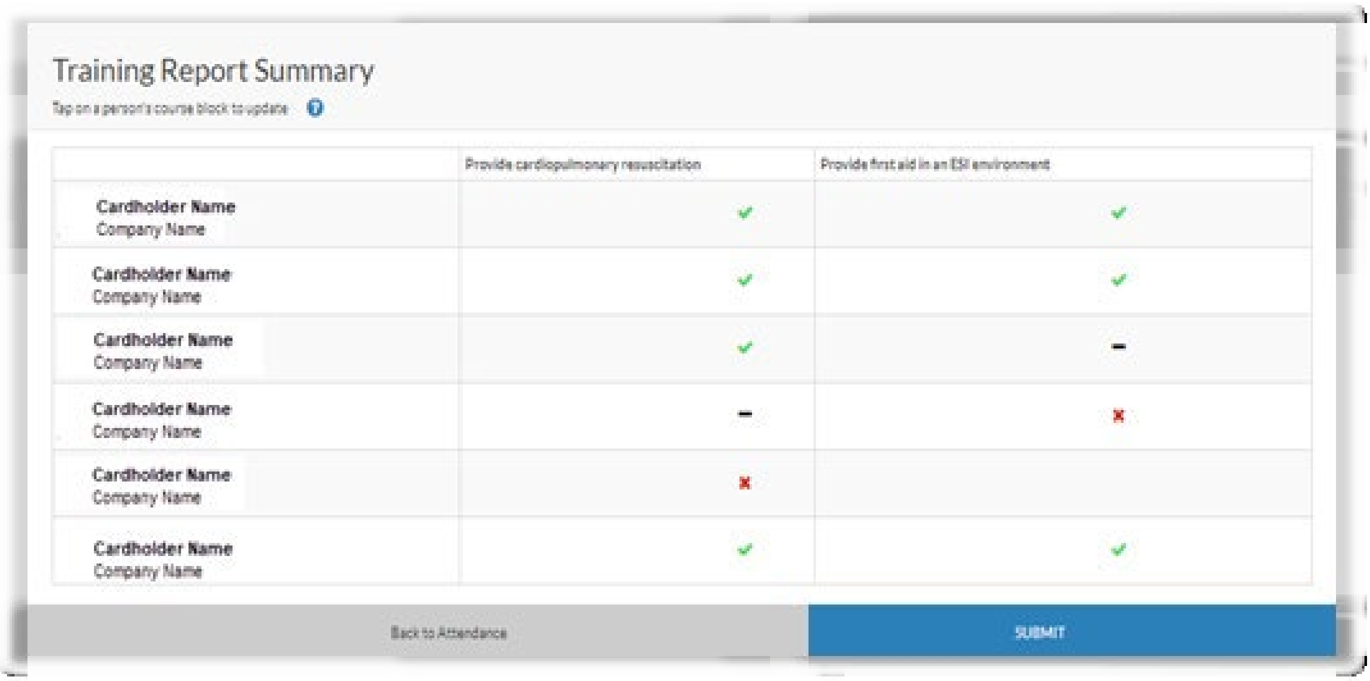
As attendees are marked, an icon representing their result will appear alongside their name.

✔	Competent
✖	Not Competent
▬	Absent
Does not appear	Was not required



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 to make changes.



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.

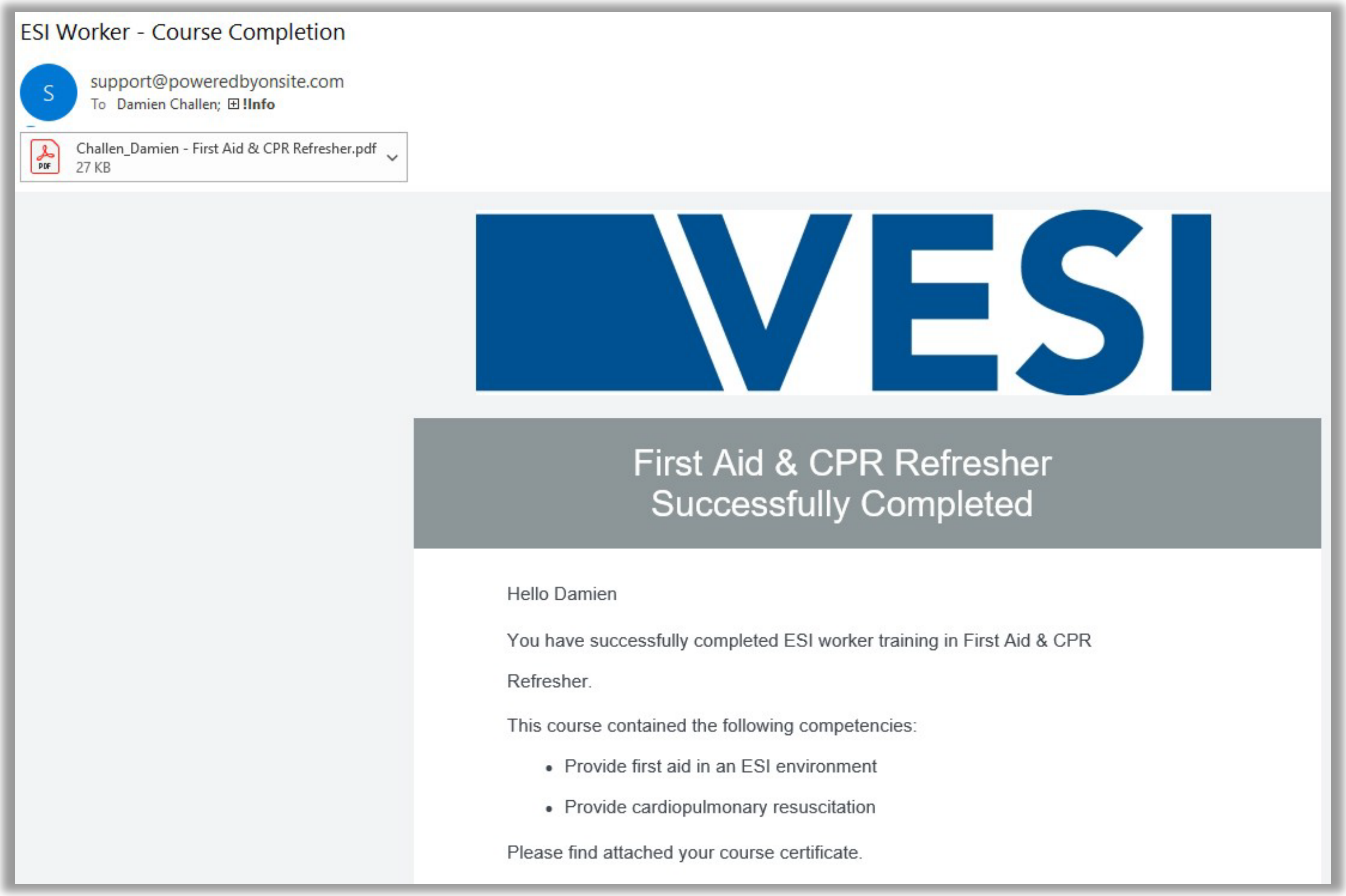
If you notice that an incorrect attendee has been included, select the Back to Attendance button and then the Back to Attending Students button. Remove the incorrect person and include the correct one. Select Attendance and mark the individual in all competencies.

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: -

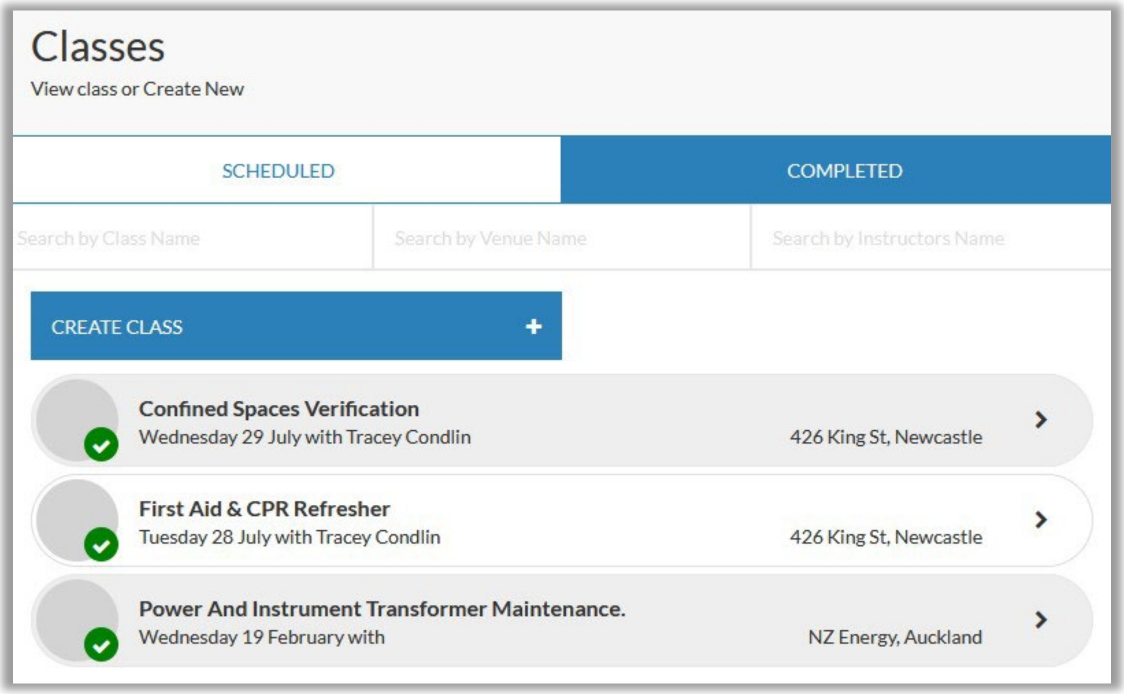
- The class will be set as Completed
- The individual (if competent) will receive the competency against their Onsite profile and a copy of the certificate will be automatically loaded as an attachment.
- The individual (if competent) will receive an email confirming their competence and a copy of their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



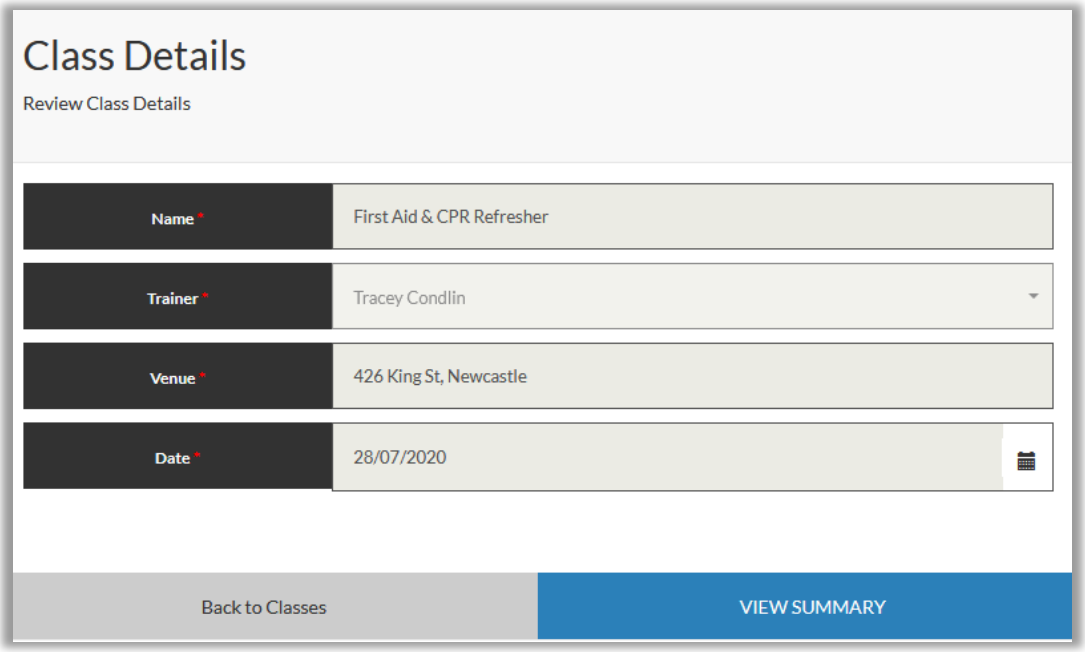
Sample email for Attendee getting notified of Successfully completing a course.

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.



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.



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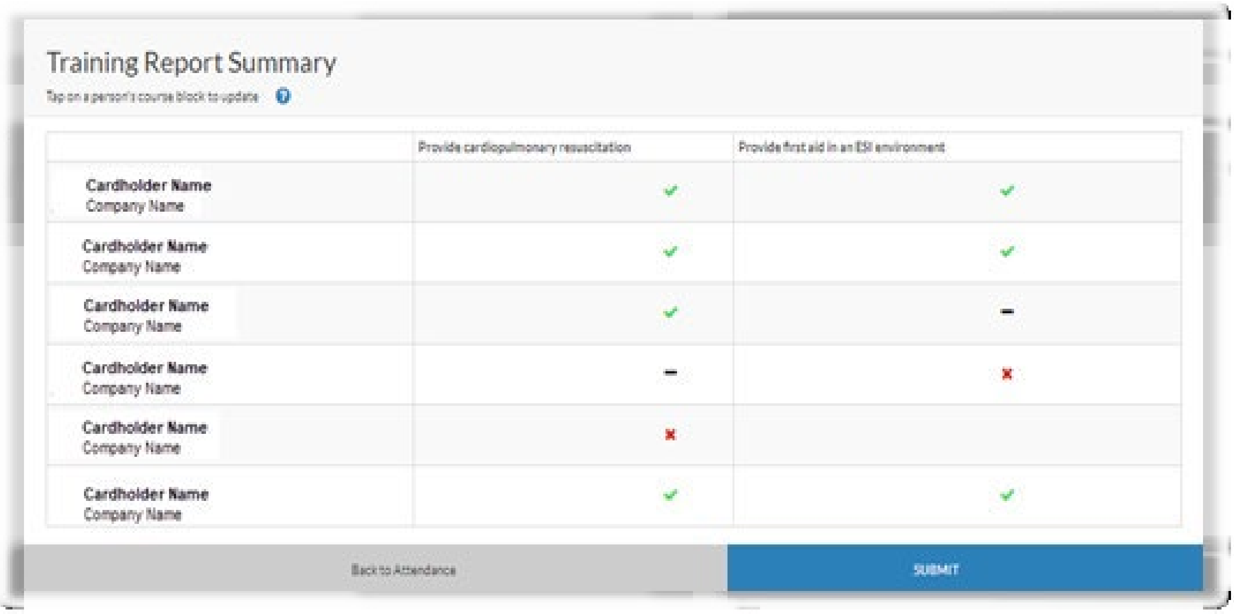
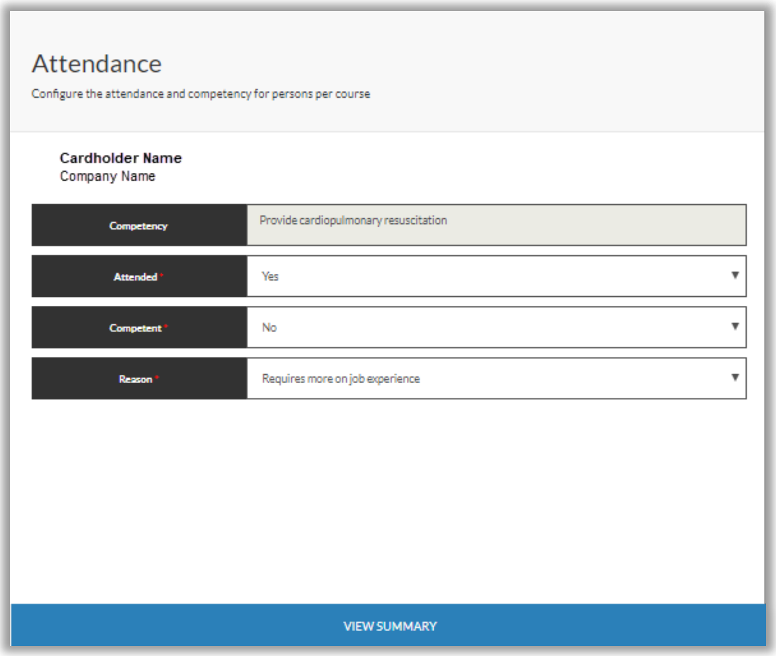


To review the result of an individual, click on the icon alongside their name and in the column of the correct competency, this will take you into the attendance record for the individual.

✔	Competent
✖	Not Competent
–	Absent
Does not appear	Was not required



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

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