User guide: editing validated training records for a single member

Roles: CTMs (and national equivalents), Country Adult Training Commissioners, Superusers, HQ Admin (Adult Support)

Process overview: This process allows users with the correct access rights to search for a member and edit their existing, validated training records.

This process allows users to edit (correct) the existing details of the learning or validation for a module, including:

- Whether it was agreed that the learning was required, and if so, what learning has been completed and when.
- The agreed validation criteria and method for completing them.
- The date of validation and who it was validated by.

Editing existing training records should only be undertaken with good reason and with permission from the relevant member.

For this process you will need the details of the learner, including the membership number (if available). If you are validating the module or assigning a Training Adviser for it, you will also need the relevant Training Adviser's details. To add the Training Adviser, you can search using either their membership number or first name or surname.

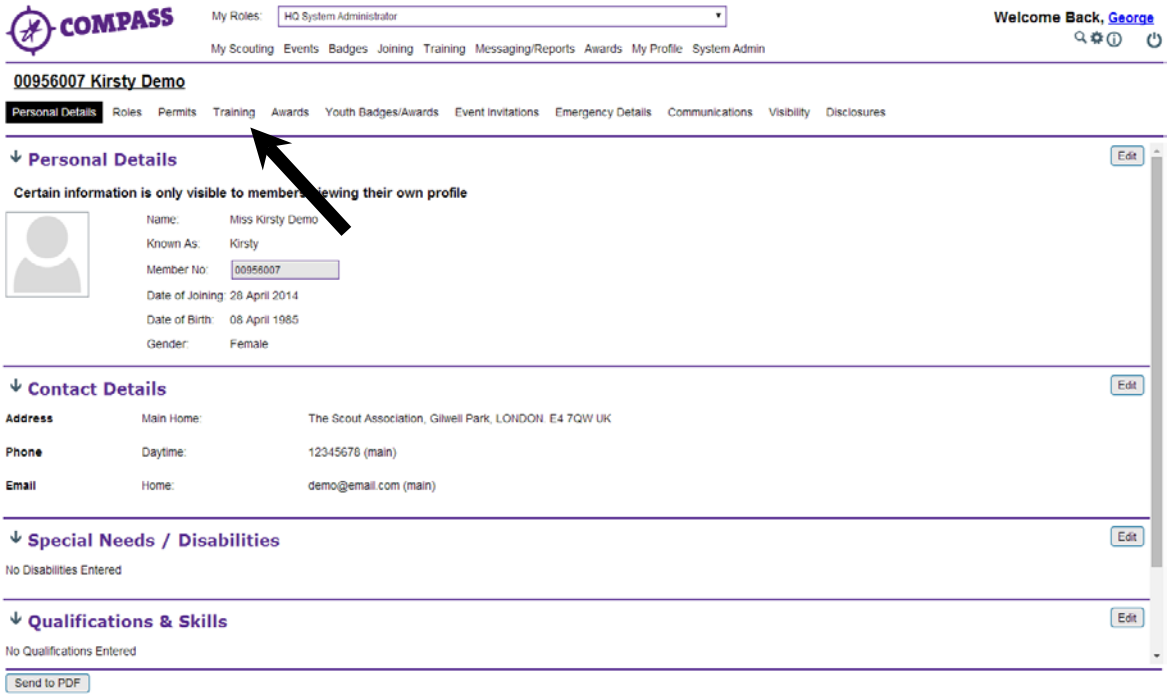
Please Note: In this process, the available modules are displayed under a heading for each Personal Learning Plan (PLP) role the member holds, so the same module may appear more than once if it is required for more than one role. If the same module is listed under more than one role, updating it for one role will automatically update it for all other roles. The only exception to this is if a module requires re-validation for a different role, for example a change of section. You should bear this in mind when you select the module to be updated.

Process: editing validated training records for a single member

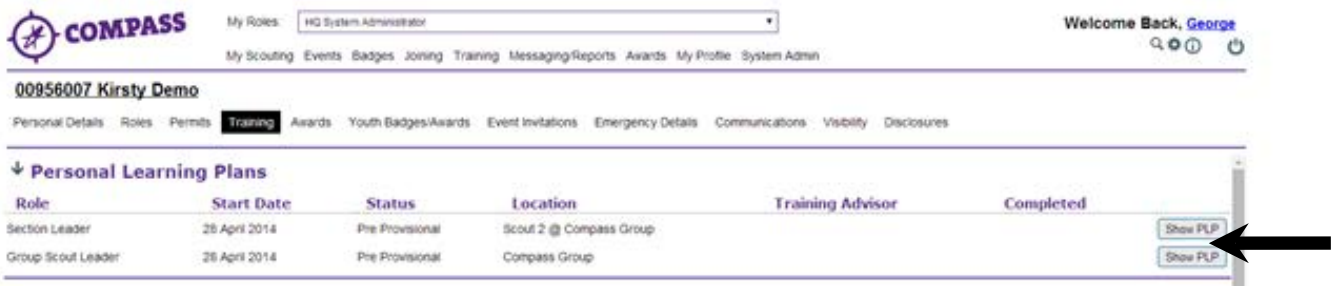
1 Ensure you have selected the correct role from the ‘My roles’ dropdown menu at the top of the homepage. (This will be the role that gives you the appropriate access rights to complete this process.)

2 Search for the member whose record you want to update. (See user guides for ‘Basic search’ or ‘Advanced search’ for guidance on how to do this.)

3 Once you have found the correct member record, the member’s profile page will appear. Here you will see a row of headings going across the page underneath the member’s name and membership number. Click on the ‘Training’ heading.

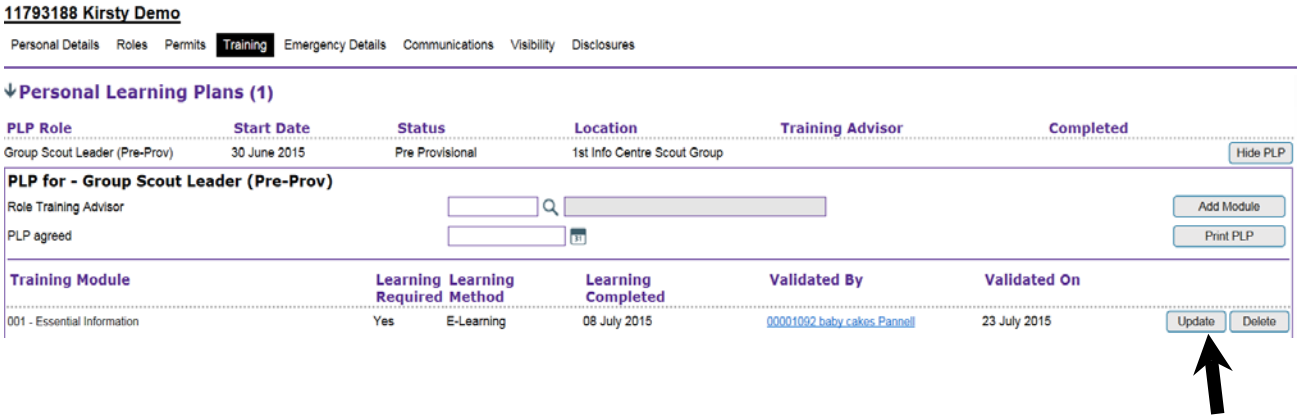


4 The ‘Training’ page is split into two sections, the first being ‘Personal Learning Plans’. Click on the ‘Show PLP’ button at the right hand side of the role you want to view.



5 Once you have opened the PLP for a specific role, a list of modules that form that PLP will be shown under the 'Training Module' heading.

To edit (correct) existing records, click on the 'Update' button next to the module you want to edit.



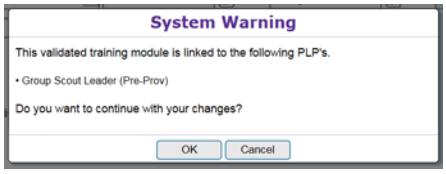
6 A popup window will appear titled 'Edit PLP training module', with the member's name and membership number underneath.

This popup window will show all existing information about the module.

To edit this, update the information in the relevant boxes, and click 'Save'.

Please Note: If you change information for a module that is listed under more than one role, updating it for one role will automatically update it for all other roles. The only exception to this is if a module requires re-validation for a different role, for example a change of section. You should bear this in mind when you select the module to be updated.

A warning message will then appear showing the names of all PLPs to which the module is linked.



If you still want to proceed, click on ‘OK’.