SKILLS PASS™

Training Provider Guide

Table of Contents

Exploring Your SkillsPass Account

Logging In

Once your account has been configured for you, you'll receive a confirmation email inviting you to set up your profile:

Welcome to SkillsPass

Hello Victoria,

Please click the following link below to set your password and begin using your account. The password requirements are that it contain a minimum of any 8 characters. You will receive an email confirmation once you set your password.

https://kube-prod.bluedrop360.com/auth/ssr/email-verification?token=eyJ0eXAiOiJKV1QiLCJhbGciOiJIUzI1NiJ9.
eyJwYXNzd29yZFNldCI6dHJ1ZSwidXNlcklkIjoxNzMzNjEsImV4cCI6MTUzMzEzNDYyMTAwMCwiaWRlbnRpZmllci
I6InZpY3RvcmlhYmxhZ2RvbiswNzE4QGJsdWVkcm9wLmNvbSIsIm5iZiI6MTUzMTkyNDcyMTAwMH0.
L0ns3ZphpfqkImFfd9BT-gf4qxn60fkceXRBtL7ImUQ&scope=email,family_name,given_name&
redirectUrl=https%3A%2F%2Fmyskillspass.com%2Fportal-one%2Fsign-up
If the link isn't working, you can copy and paste it into your browser's address bar.

Follow the prompts and fill in all the required fields to complete your profile and set a password.

One the initial setup is complete; you'll log in to the Training Provider portal using the email and password you've set.

Forgot your password

If you're unsure of your password, use the "Forgot your password?" button on the sign-in page to trigger a password reset email.

The Home Page

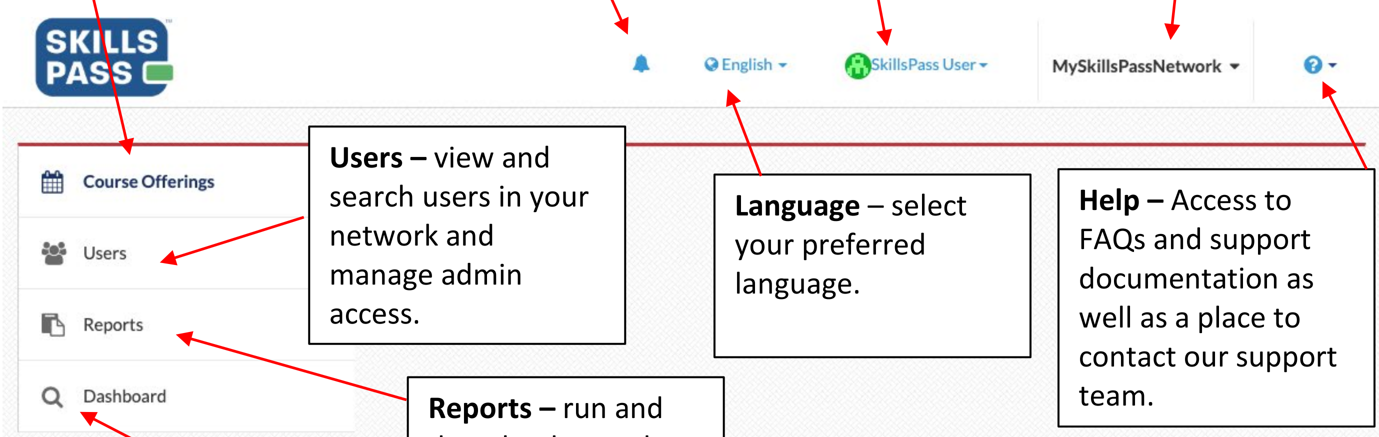
After logging into your SkillsPass Training Provider account, the homepage gives you several actions you can take, and information you can view.

Course Offerings – Schedule course offerings for Learners.

Notifications – you'll be notified when Learners register for your offerings.

My profile – Self management options of your account.

Network – Identify your current network.



Users – view and search users in your network and manage admin access.

Language – select your preferred language.

Help – Access to FAQs and support documentation as well as a place to contact our support team.

Reports – run and download records for course registration, attendance, and completion.

Dashboard – view details and create reports related to all certificates issued by your company.

My Profile

Access and update your personal information by selecting your name in the top right corner and choosing either **Profile** or **Settings.**

Under Profile, you'll have the ability to:

- Edit your personal information
- Change your password
- Add/remove associated employers

Under Settings, you'll have the ability to:

- Change your privacy settings
- Enable/disable email and text notifications for Course Offerings associated with your name.

My Network

Use the Network drop-down to navigate between Training Networks if you are a part of more than one.

Notifications

You'll be notified when there are changes made to Course Offerings in your Network (edits, cancellations, etc.), and when students self-register or remove themselves from Course Offerings in your Network.

Language

Use the Language drop-down to set your preferred language.

Help

Click the "Help" button in the top right corner of the platform to access:

- **Help** – a link to our extensive, self-help knowledge base
- **Support** – reach out to us directly and we'll respond promptly to your inquiry

Course Offerings

As a Training Provider, you'll be responsible for creating and maintaining a list of Course Offerings. When under the "Course Offerings" tab, you'll see all Offerings listed:

- Active Offerings will be listed at the top – they are upcoming events, events with no registrants, or have already occurred but have not had registrant attendance and/or grades recorded.
- Completed Offerings will be listed at the bottom, and indicate the event has passed, and that all attendance and grade requirements have been met.

You can use the filters at the top of the page to narrow your search field when viewing both Completed and Active Offerings.

There are two type of courses supported by the system: Virtual and In-Person. Virtual Offerings allow you to enter a virtual training link and will not require a physical location to be entered.

Add an In-Person Offering

To create a new in person Course Offering, use the "+Add Offering" button in the top right of the platform, under Course Offerings. You'll be prompted to provide the following information:

- Course: choose from a selection (where applicable) of Courses specifically customized to your network
- Offering Details:
    - Private or Public – a private offering can be reserved for a specific employer, while a public offering will be open to any Learners (if Private, you'll be prompted to select the Employer from a dropdown list).
    - Publish – a published class will be seen by any Learners in the StoreFront/Marketplace.
    - Instructor – each course will need an Instructor, which you'll be able to choose from a pre-populated list.
        - For MLTSD courses, there may be multiple instructors and/or evaluators required, based on MLTSD standards. You'll receive an error message if these criteria are not met.
    - Seats – select a number of openings for the Offering (must be greater than 1)
    - Free – if this is toggled on, you will not be required to fill out further payment information.
    - Price – for offerings that are not Free, you'll need to set a price.
    - Show Price – you can choose whether price is indicated in a Course Offering (if it's toggled off, Learners will be instructed to contact you for more information).

    - Special Instructions – a space to add any special details that pertain to the Course Offering.
- Contact Information for Offering – enter email address with optional space for telephone and fax numbers.
- Location of Offering – will default to the location configured for your Training Provider Network.
- Select Dates of Offering – use the Calendar to indicate the dates and times this course will be offered (some courses are two days mandatorily).

Complete your work by selecting “Save” in the bottom right corner.

Add a Virtual Offering

To create a Virtual Course Offering, use the “+Add Offering” button in the top right of the platform, under Course Offerings. You’ll be prompted to provide the following information:

- Course: choose from a selection (where applicable) of Virtual Courses specifically customized to your network or select Virtual Classroom.
- Offering Details:
    - Private or Public – a private offering can be reserved for a specific employer, while a public offering will be open to any Learners (if Private, you’ll be prompted to select the Employer from a dropdown list).
    - Publish – a published class will be seen by any Learners in the StoreFront/Marketplace.
    - Instructor – each course will need an Instructor, which you’ll be able to choose from a pre-populated list.
        - For MLTSD courses, there may be multiple instructors and/or evaluators required, based on MLTSD standards. You’ll receive an error message if these criteria are not met.
    - Seats – select a number of openings for the Offering (must be greater than 1)
    - Free – if this is toggled on, you will not be required to fill out further payment information.
    - Price – for offerings that are not Free, you’ll need to set a price.
    - Show Price – you can choose whether price is indicated in a Course Offering (if it’s toggled off, Learners will be instructed to contact you for more information).
    - Special Instructions – a space to add any special details that pertain to the Course Offering.
- Contact Information for Offering – enter email address with optional space for telephone and fax numbers.
- Virtual Offering Link – enter the virtual link for the course.

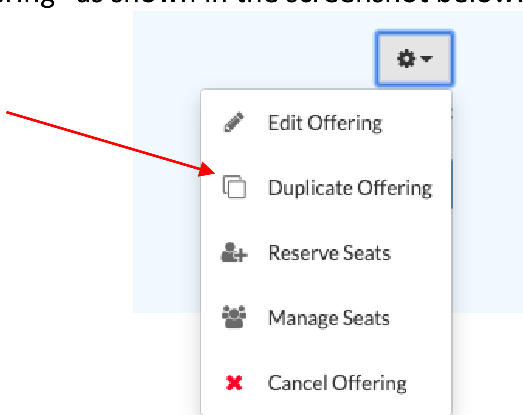
Note: The virtual offering link will not display in Marketplace for bookings or for reserved seats. The link will be included in the notification to the learner when the seat moves from reserved to registered.

- Select Dates of Offering – use the Calendar to indicate the dates and times this course will be offered (some courses are two days mandatorily).

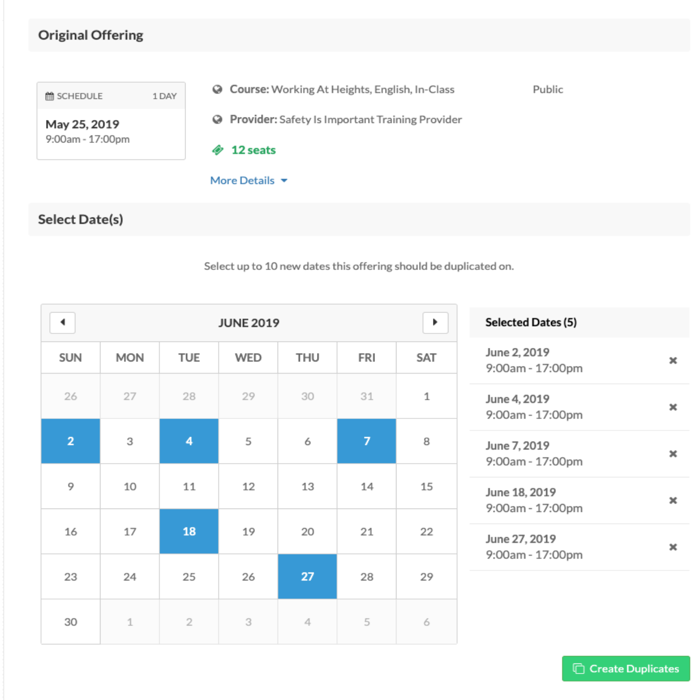
Complete your work by selecting "Save" in the bottom right corner.

Duplicate an Offering

For Public, single-day Course Offerings, you can easily have the details of the Offering (instructor, location, price, time, etc.) copied and scheduled for up to 10 new dates. To do so, select the gear icon beside the Course you would like to reproduce, and choose "Duplicate Offering" as shown in the screenshot below:



You will be presented with the details of the Offering you want to duplicate, and a calendar from which you can choose up to 10 new dates for the Offering to be scheduled for:



Select the dates you would like, and choose “Create Duplicates” to save your work.

Both Active and Completed Offerings can be duplicated. Completed Offerings will be set as Active when they are copied.

Only the Offering details are duplicated. Any Learners registered will not be copied.

Edits to the Offerings will need to be made individually, after the Offerings have been duplicated.

Edit an Offering

To Edit an Offering use the Gear icon located to the right of a Course Offering and select “Edit Offering”.

Once a Course Offering has been created, the fields you can edit are:

- Offering details: Publish settings, number of seats, and pricing information
- Contact Information
- Location or Virtual Link for the Offering
- Offering Date: you need to first de-select the current date(s).

If a Course Offering is edited after Learners have begun to register, those signed up will receive emails indicating the updated changes.

Delete an Offering

To Delete a Course Offering use the Gear icon located to the right of the Course Offering and select “Cancel Offering”.

If a Course Offering is canceled after Learners have begun to register, those signed up will receive emails indicating the cancellation.

***NOTE:** You will not be able to cancel a Course Offering that already has attendance or grades recorded.

Register Students

To register students for a Course Offering (this step is necessary if the Offering is not published), find the Offering you’re looking to update, and choose either “Reserve Seats” or “Manage Seats” under the Gear icon drop-down, located to the right of the Offering.

You’ll first be prompted to select whether you’re reserving on behalf of an Employer.

If you **are not** reserving on behalf of an employer:

- Add an attendee based on either (one is required) their email or phone # (if using a phone number, the Learner’s address will be required)
- You’ll be provided with a summary of all users that match that information, with additional details. If the user you’re looking to register is shown, confirm your choice by clicking “Select User”.
- If there are no users that match your information, you’ll be prompted to create a new user profile based on the information you have about the specific Learner (you’ll need their first and last name, and year of birth).
- Completing the profile setup or confirming the correct user will register the Learner for that Offering and bring you back to Course Offerings page.

If you **are** reserving on behalf of an Employer:

- You’ll be prompted to select the Employer from a drop-down list, fill out contact details, and choose how many seats you would like to reserve (if there are not enough seats available, you’ll receive an error message).
- Once completed, you’ll be brought to a page to manage the seats by adding Learner details for each reservation.
- If you have the Learner’s information, you’ll follow the same steps as above for registering each user.
- If you do not have the Learner’s information, you can fill out the seats later.

- Click through the seats to fill in the Learner's information, and add more seats, or remove seats as needed.

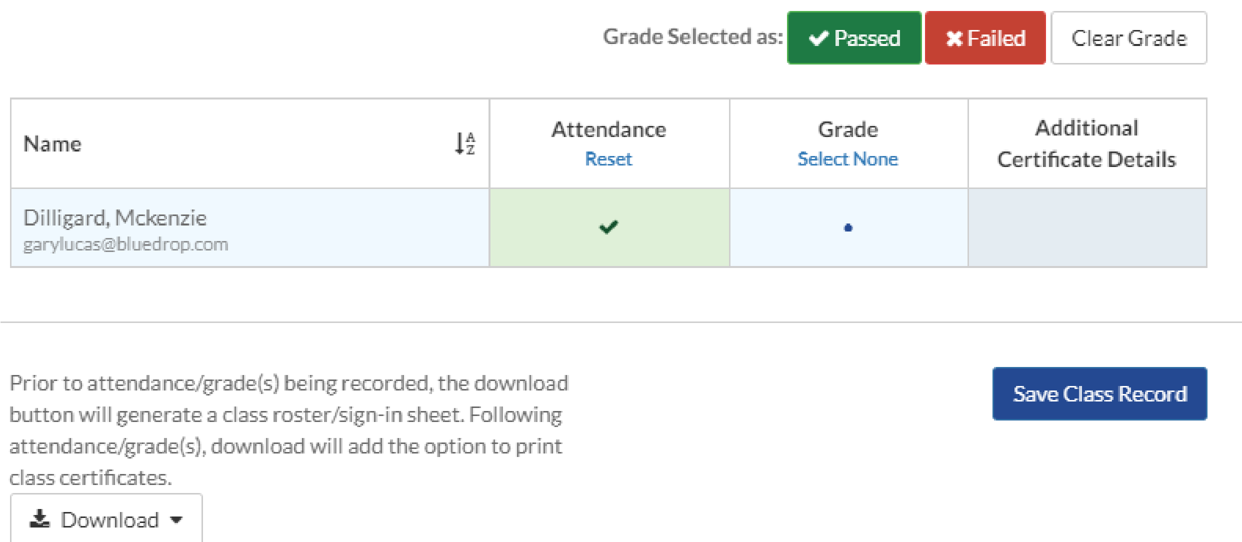
***NOTE:** At any point, you can edit or remove registrants from Course Offerings by using the "Manage Seats" option.

Grades and Attendance

To finalize a Course Offering and provide the registrants with access to their certificates, you'll need to mark Grades and Attendance for that course. This can be completed by using the "Class Record" button located beside a Course Offering.

You'll see a list of the Learners that were registered for that Course, and three empty columns – Attendance, Grade and Additional Certificate Details.

- Save **Attendance** by clicking in the column – one click will give you a positive checkmark (indicating they attended) and clicking on the same column again will give you a negative x (indicating they did not attend).
- Save a **Grade** by clicking in the column associated with a Learner – you will be prompted to select Passed or Failed:



- **Additional Certification Details** can be used to enter client specific information.

Once you have completed marking attendance and grades for all the registrants, confirm your changes by selecting "Save Class Record" in the bottom right of the page. You will then be shown a summary of the changes you made and asked to confirm again.

Prior to attendance/grade(s) being recorded, the **Download** button will generate a class roster/sign-in sheet. Following attendance/grade(s), the **Download button** will add the option to print class certificates.

***NOTE: once you mark attendance and grades, they cannot be edited**. If you make a mistake, please reach out to support for help.

***NOTE:** You will only be able to access the Class Records of a Course Offering that:

- Is past its start date and time. For example, you can take attendance at 9:01am for a Course Offering scheduled to begin 9:00am that same day.
- Has Learners registered – attendance cannot be taken for an empty Offering.

Users

Under the Users tab, you'll be able to view and search all current Administrators and Instructors in your Network.

Administrative Access

As a Network Training Provider, you'll have the ability to control Administrative access for other users. You can identify other Administrators in your Network by locating the red Admin badge beside their name.

To add a new Administrator (a user **not** currently part of your Network), use the "+Add Administrator button in the top right of the platform. Fill in the required information and save your work by selecting the green Save Administrator button in the bottom right.

To upgrade the permissions of a current Network user (either a Member or Instructor) select the Gear icon dropdown beside their name and choose "Make Network Admin".

***NOTE:** If you upgrade the permissions of a user, or invite a new user into the Network, they will have the ability to create, edit, and delete course offerings.

To remove the Administrative access of a user, locate them in the User list, select the Gear icon dropdown beside their name and choose "Remove Network Admin".

***NOTE:** This will remove them completely from your learning Network.

Reports

As a Training Provider, you'll have two options under the Reports tab:

Training Provider Training Records:

- Registration and attendance information:
  - **Provider Name**
  - **Instructor Details**: first and last name, and email.
  - **Registrant Details**: first and last name, year of birth, SkillsPass ID, and email.
  - **Course Details**: Title and date of offering
  - **Confirmed**: Identifies if the user has confirmed their SkillsPass account (f=false, t=true)

- **Attendance**: “completed” if the instructor has taken attendance

Training Provider Completion:

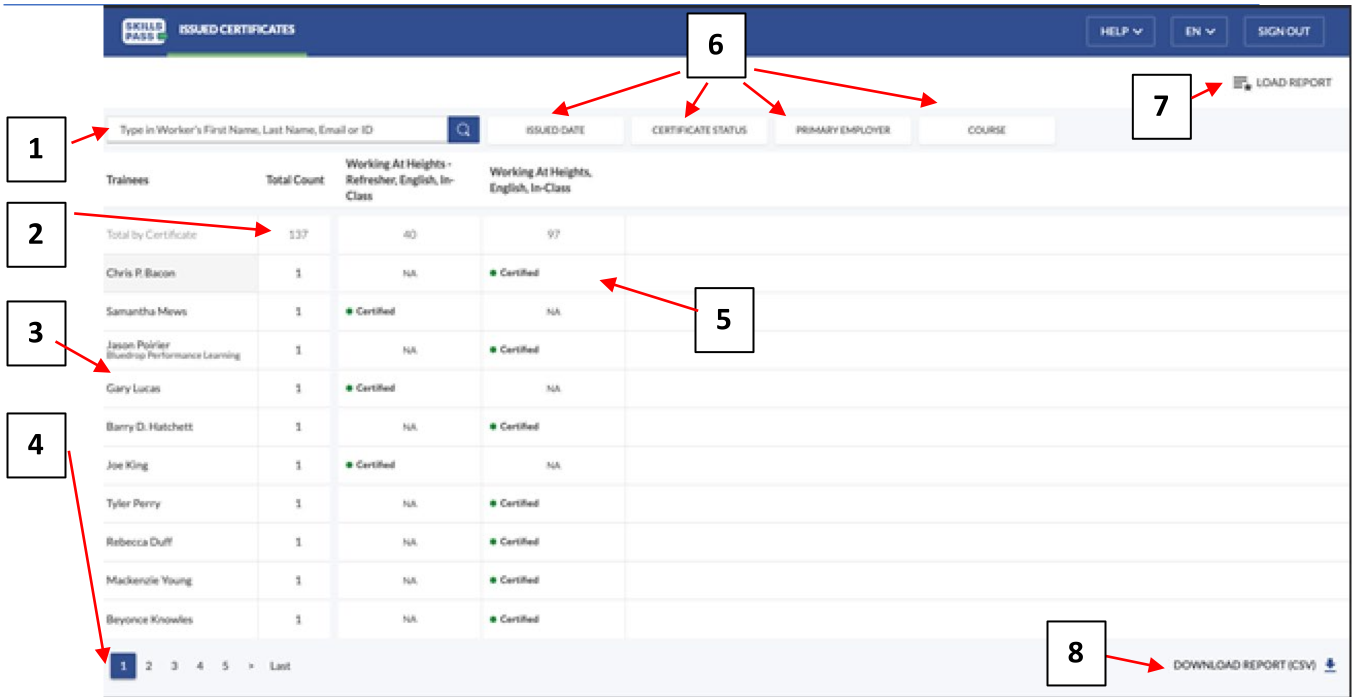
- Course offering completion records for your Network:
    - **Provider Name**
    - **Instructor Details**: first and last name, and email.
    - **Registrant Details**: first and last name, year of birth, SkillsPass ID, and email.
    - **Course Details**: Title and date of offering
    - **Confirmed**: Identifies if the user has confirmed their SkillsPass account (f=false, t=true)
    - **Expiration Date**: Date when training certification will expire
    - **Paid/Unpaid**: Payment status for registered trainee
    - **Status**: Completion status for registered trainee – **Pass/Fail**

***NOTE:** After attendance is taken, please allow **1 hour** for the data to be updated to your reports.

Dashboard

Under the Dashboard tab, you’ll find detailed information and the ability to create reports related to all certificates that were issued by your company.

When Dashboard is selected, you’ll be directed to the following screen:



1. Use the search bar to search for a specific Learner by first or last name, email, or SkillsPass ID.

2. View a total count of all certificates that have been awarded by your organization (this number will update to reflect the number of certificates associated with the filter that you apply).

3. All Learners that have completed training with your organization will be listed on the left-hand side, and an indication of the "Total Count" of certificates that have been awarded.

4. Navigate through the list of results.

5. You will be able to see information related to all courses that you have associated with your Network, with an indication of the current certificate status.

6. Filters – narrow your results by filtering by Issued Date, Certificate Status, Primary Employer and/or Course

   When filters are set for a narrowed view, you'll see the option to "Save Report" in the top right corner:

This will allow you to name the report, and load this report at any time, without having to reapply the filters.

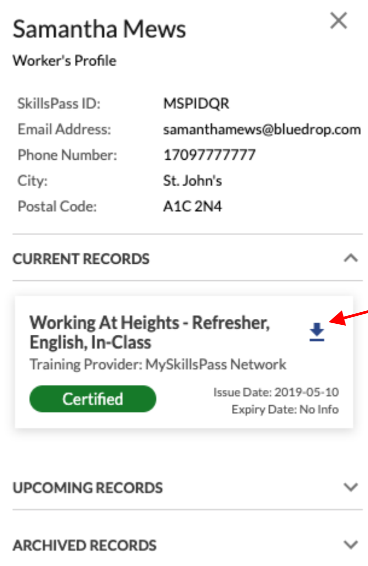
When filters are set, they will be highlighted in blue. Be sure to reset any filters to return to the original view of all certificates.

7. Load Report – load saved reports.

8. Download Report – download any report and all pertinent Learner information to a CSV file.

Viewing Learner information

To view information related to a specific Learner, select their name from the list on the left. This will open a side bar on the right-hand side of the screen:



Download the Learner's certificate directly from this screen.