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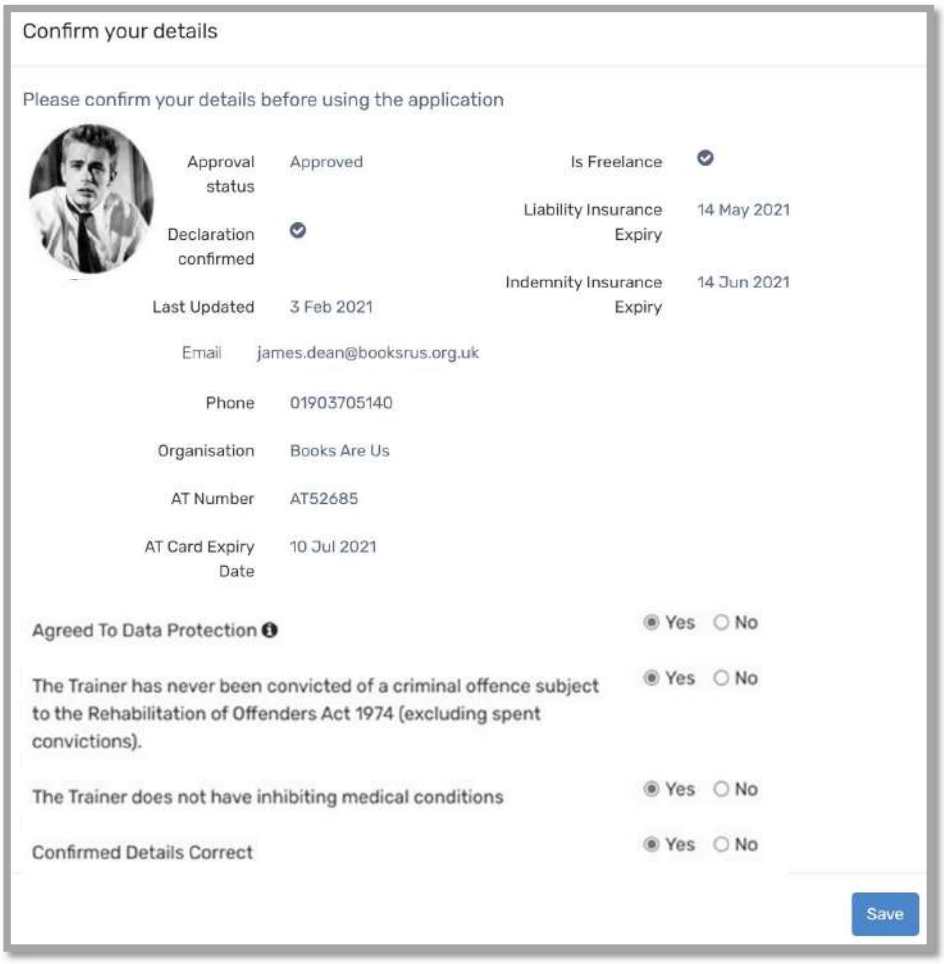
Course Process for Trainers

Welcome to the new HESA Training system. In this section it will explain the process on how the system works whilst a course is running.

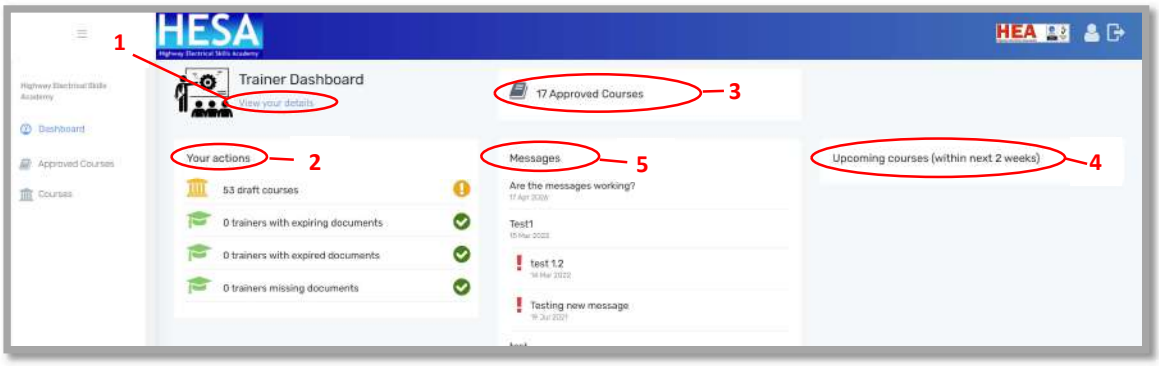
Once you have logged on to the HERS system, you will need to select 'HESA' from the top righthand corner of the page.

As this will be the first time you log in as a Trainer, the following confirmation screen will appear.



Once you have confirmed all of the information is correct, you will be able to access the HESA system as a Trainer.

The screen that you will see once access has been given is your Trainer Dashboard. The dashboard captures all the information you require to view as a Trainer. The Dashboard allows you to click on the fields showing and take you to the designated area.



1. **View your details**

   By clicking here, you will be able to review your Trainer information.

2. **Your actions**

   This area will display draft courses which have been set up for you to deliver but the status is yet to be set for the course to run. This area will also highlight if any of your Trainer documents are missing, expiring or expired. You can click through to the relevant area from here.

3. **Approved Courses**

   This displays how many approved courses you as a Trainer can deliver.

4. **Upcoming courses (within next 2 weeks)**

   A list of the courses being delivered by you as a Trainer in the next two weeks will appear here. On clicking the course, you will be taken to the course summary page for that course.

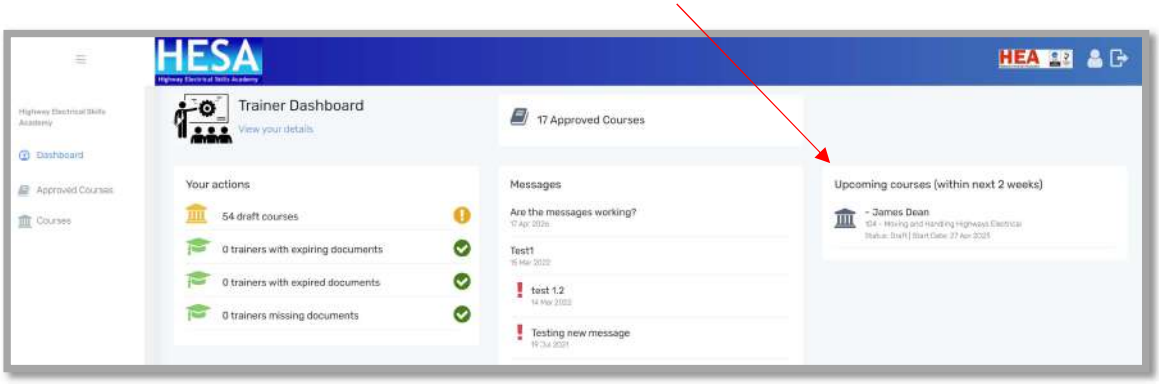
Alternatively, the course can be located under 'Courses' from the menu to the left of the Dashboard.

5. **Messages**

   Messages set by HESA Admin will be displayed in this area. By clicking on any of the messages will display a pop-up with more information about the message.

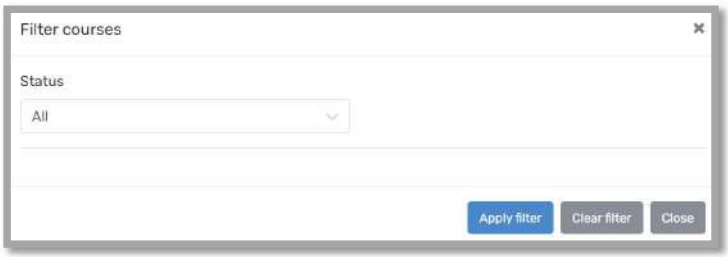
On the day of the course, select Courses from your Trainer Dashboard to find the course you are delivering.

Or alternatively, select the course from 'Upcoming courses'

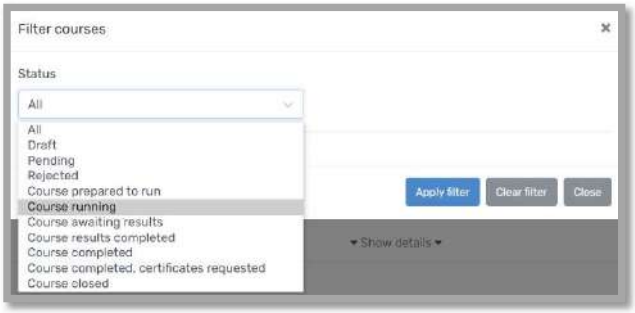


If you select 'Courses' on the menu to the left of your Dashboard, a list of courses will appear, once you have found today's course, select 'Manage'. You may find the search bar useful to filter the required course name.

The filter can also be used to show courses which are set as 'Course running'. By clicking on the blue filter button, the following pop-up page will appear;



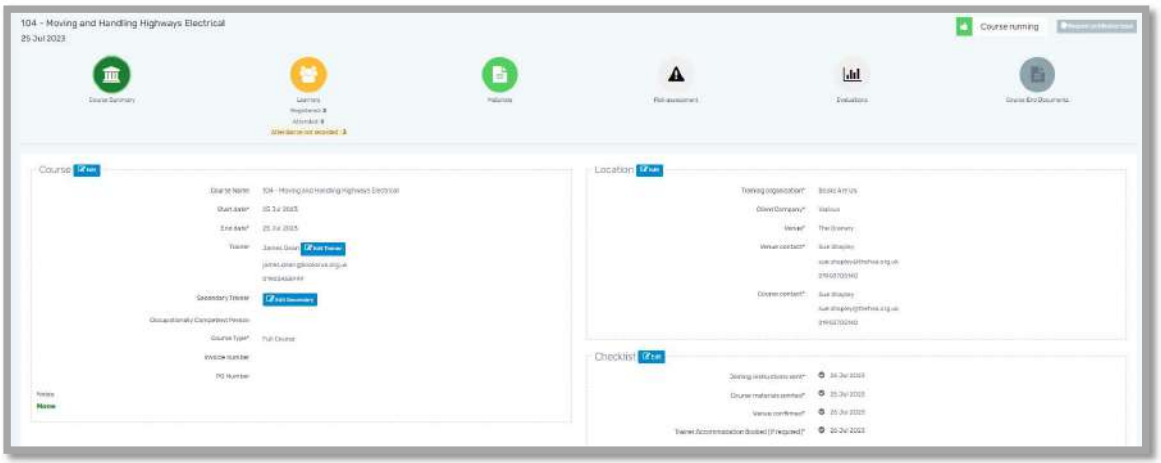
By clicking on the drop-down shown under ‘Status’, select ‘Course running’ and apply the filter.



The list of courses that are set to run, will appear. Select ‘Manage’

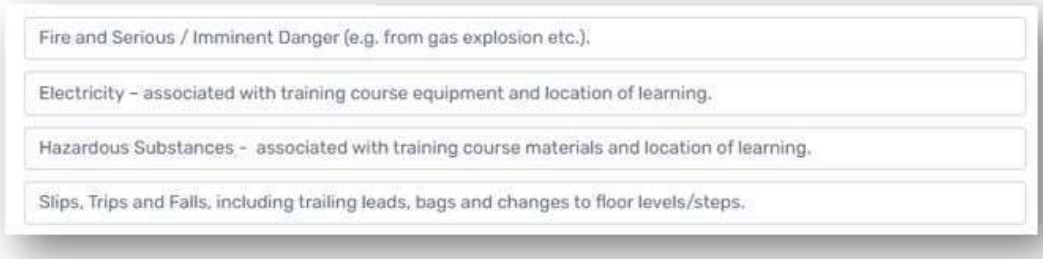
The following page will appear.

The flag to the right of the page is showing as ‘Course running’.



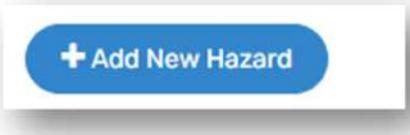
You will be required to complete the **Risk assessment** area. This area will not be available for updating prior to the day of the course.

There are four specific associated hazard types as shown below;

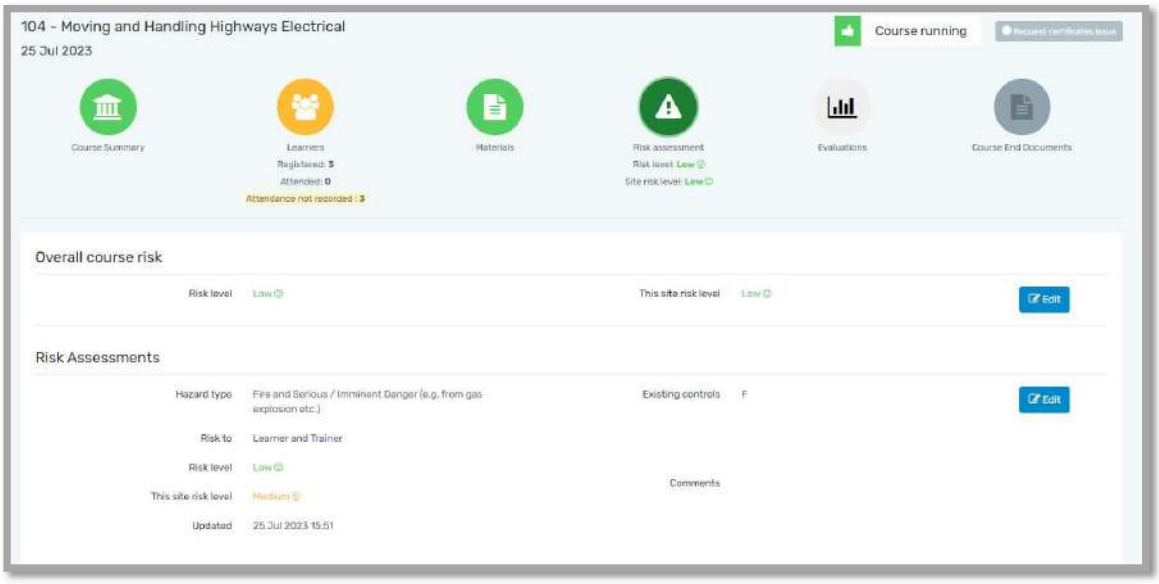


The hazard types can be updated by clicking on the Edit button.

Where other course delivery hazards are present then the tab 'Add New Hazard' must be clicked.



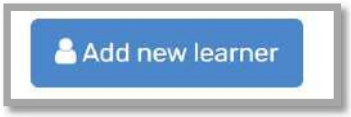
The Risk Assessment tab will then highlight to green.



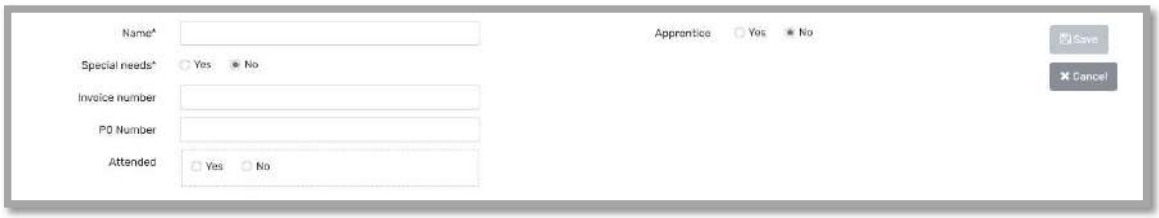
Please note, without the Risk Assessment area being completed, you will not be able to progress to the Evaluations tab or uploading of Course End Documents.

If you need to add Learners to the course, or edit an existing learner, this can be done on the day of the course. Click on to Learners. ****PLEASE NOTE: Learners cannot be added after the course has taken place. All learners must be added on the day of the course****

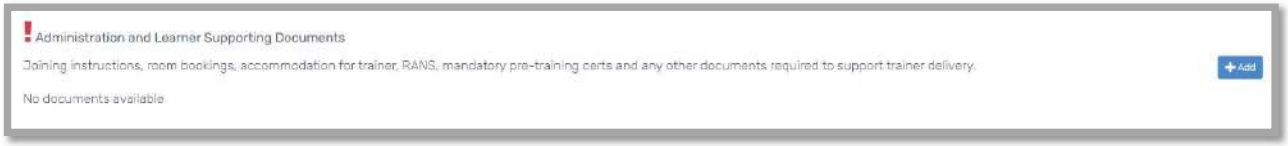
Additional Learners can be added to the course by selecting ‘Add new learner’



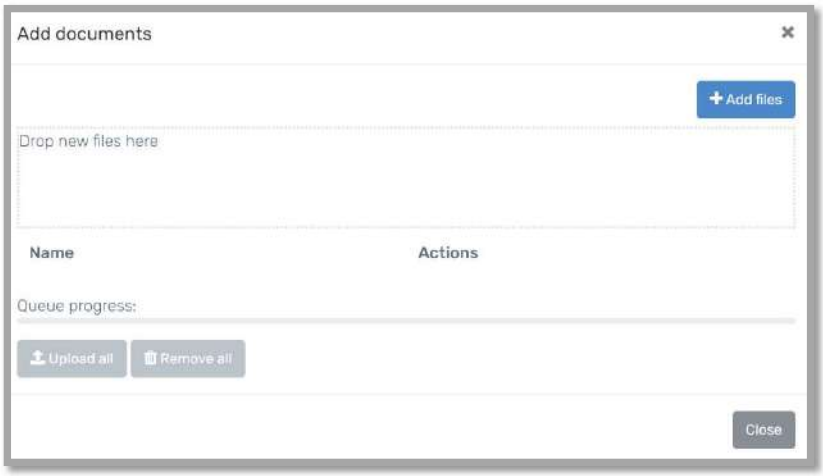
The following area will need to be completed and click ‘save’. The learner area will update.



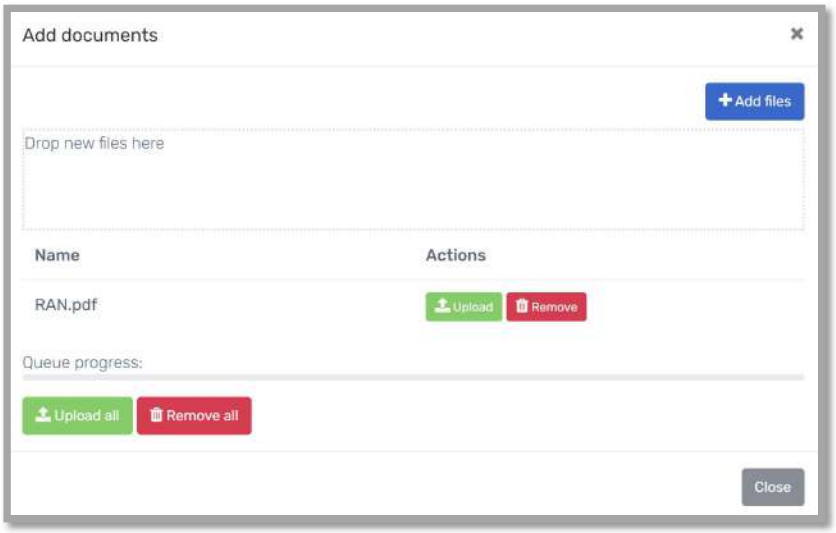
RANS will be added to the Materials section; however these may be received on the day of the course. If so, you will need to upload a copy to the Materials tab. Once the document has been uploaded to your PC, click the ‘Add button’



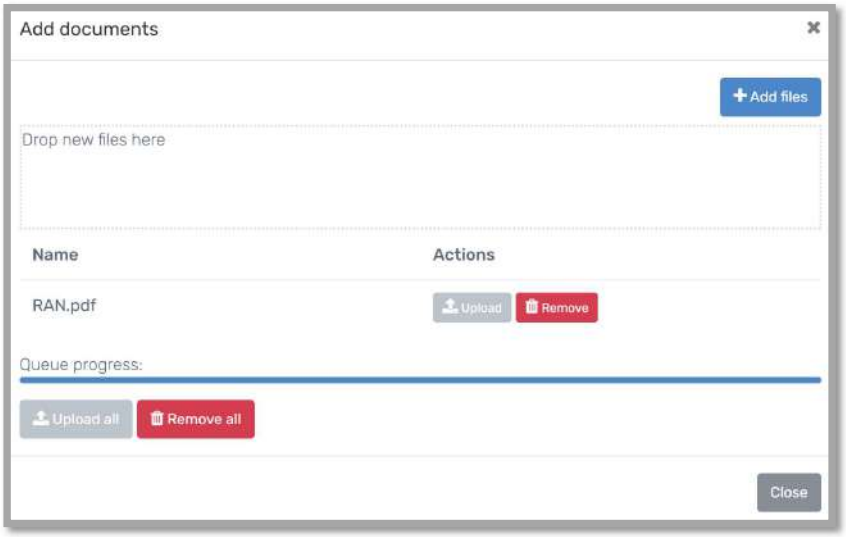
The following pop-up will appear. Click ‘Add files’ to select the document from your computer.



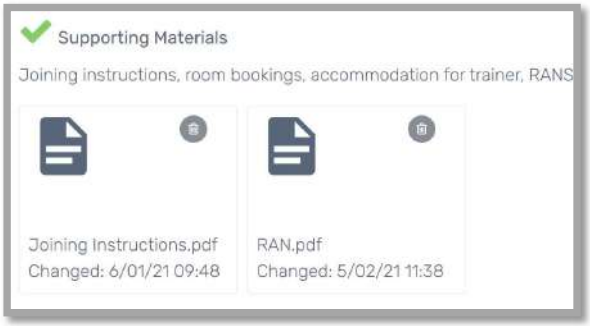
The document will appear, click ‘Upload’ or ‘Upload all’



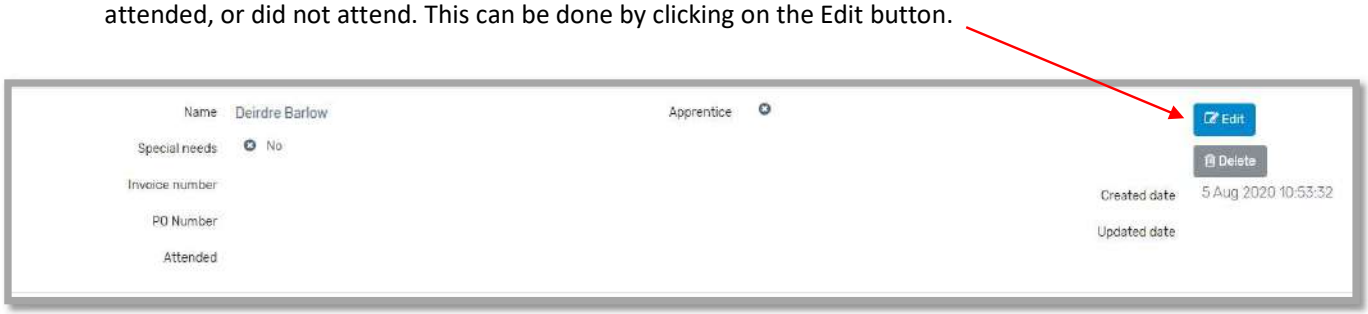
The progress bar will appear under ‘Queue progress’, please then select ‘Close’



The document will then appear in Administration and Learner Supporting Documents.



Once the course is completed, click on to the Learners tab and update to confirm if each learner attended, or did not attend. This can be done by clicking on the Edit button.

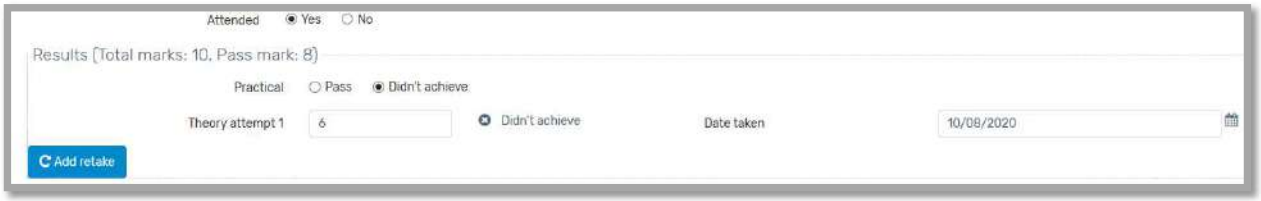


The record will update so that you can enter Yes / No to Attended.

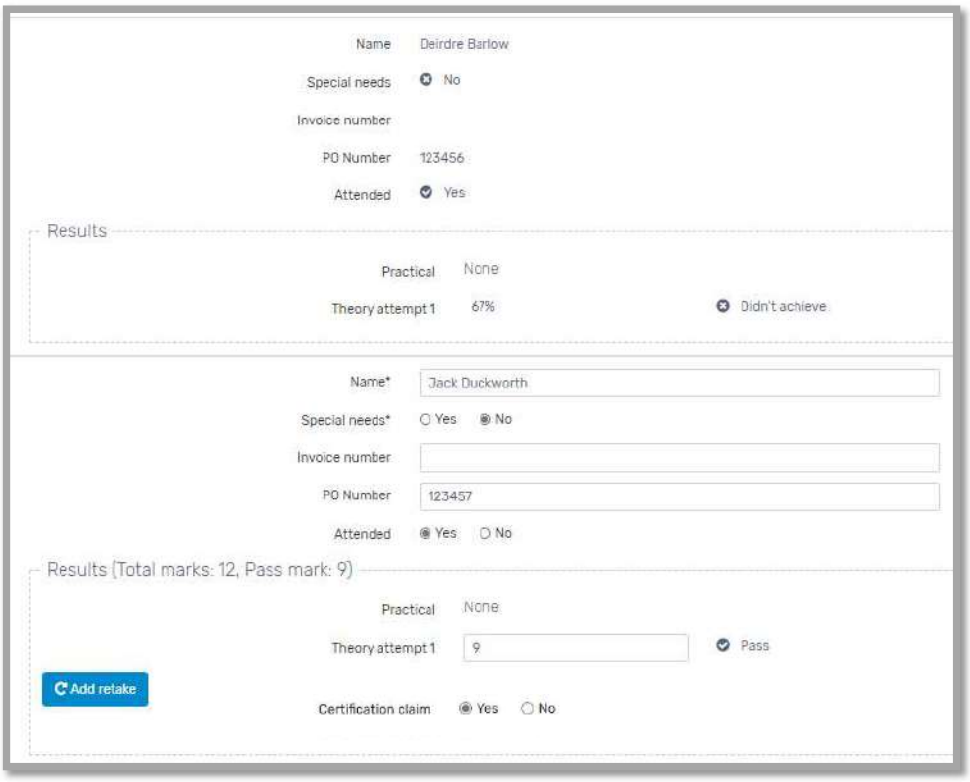
Once you click 'Yes' to Attended, this will open the area for you to enter the learner's results.

If the course attended is both a theory and practical, you will be required to update the practical learner results, followed by the Theory learner results.

If a Learner does not achieve, the 'Didn't achieve' radial button will need to be selected, plus the marks for the theory to be updated.



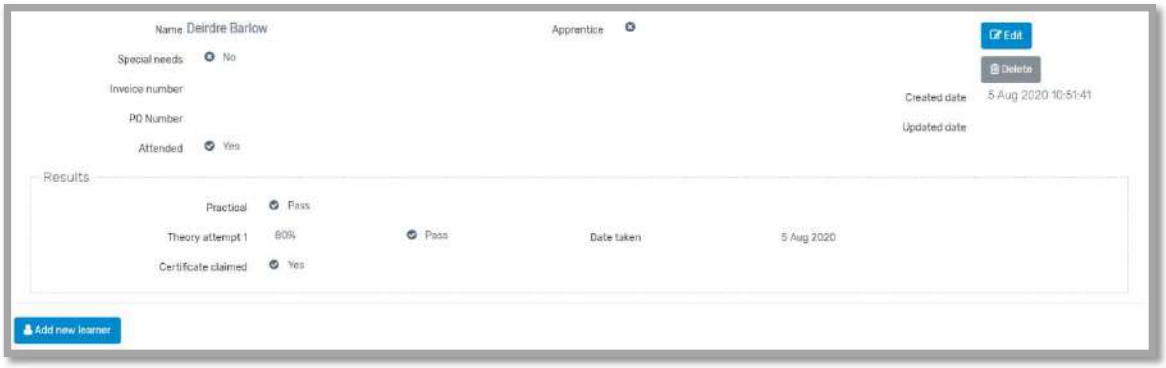
On updating the learner's results, it shows one achieved, but the other learner did not.



The learner that achieved, shows a Pass and it shows that you can now claim the certificates by clicking in the 'Yes' box. More information on claiming certificates can be found in our guide, Course Completion.

Click save against the learner's record.

The learner's record will update.

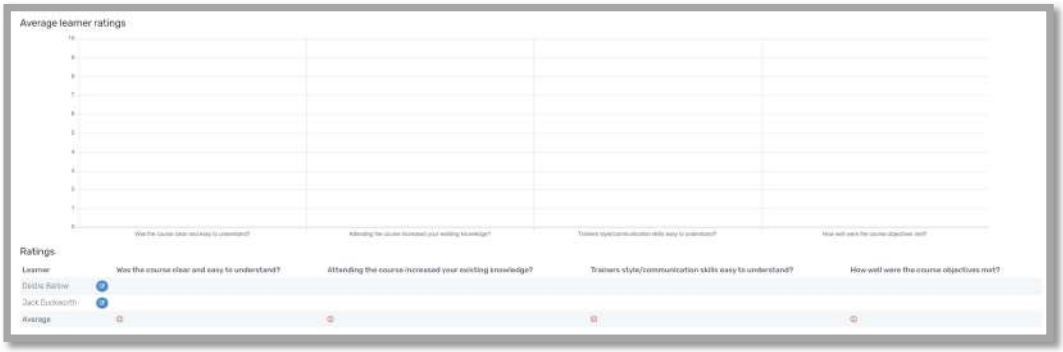


You have the option of entering the retake for the course for that learner. By selecting the 'Add retake' button. This option will be available between 14 and 42 days after the course delivery.

On clicking 'Add retake' it will open an extra line so that the new results can be updated, and the new date of the course entered. **Please note, if the course status is 'Course closed', please contact HESA Admin who will be able to assist.**

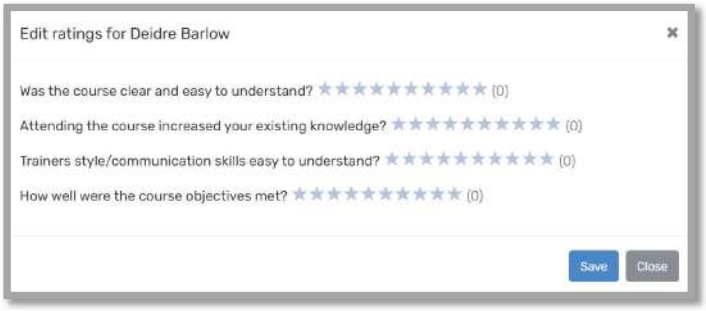
The next area to complete is **Evaluations (the Learners area will need to be completed prior to updating this area).**

The following page will display.



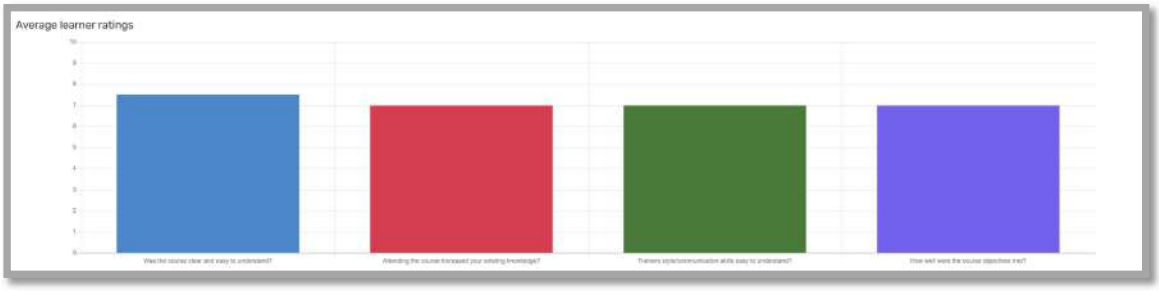
In this area you can update the Learners evaluations of the course. To do this, click on the edit button next to the learner's name.

The following pop-up will appear.

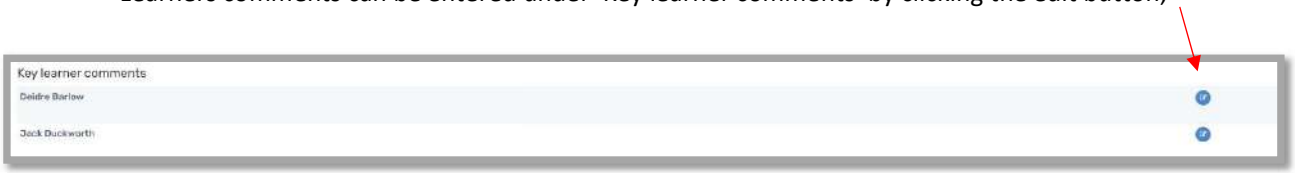


By hovering your mouse over the number of stars, you can then click on the desired rating. Click save once completed.

Once complete, the chart will update to reflect the evaluations received.



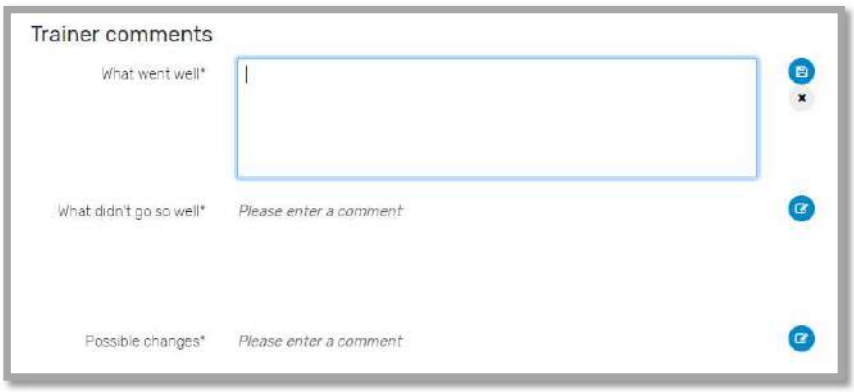
Learners comments can be entered under 'Key learner comments' by clicking the edit button;



Once the comment has been entered, select the save icon;

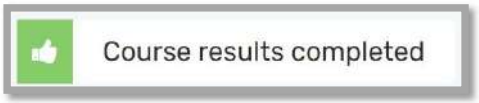
At the bottom of the Evaluations page is the area for your mandatory comments as the Trainer.

By clicking on the edit button, you will be able to enter your comments, once complete, press the save icon.



Once all evaluations and Trainer comments are completed, the Evaluations icon will change to green, displaying the lowest average rating of the course.

The flag for the course will update to Course results completed.



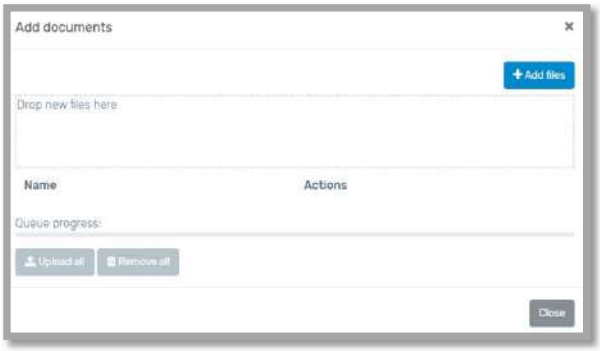
The next area to complete is **Course End Documents.**

This is where you will be required to upload the Course End Documents. This area can only be completed once the course has finished.

Once you have all documents from the course, it is preferred that the documents are scanned in the following order;

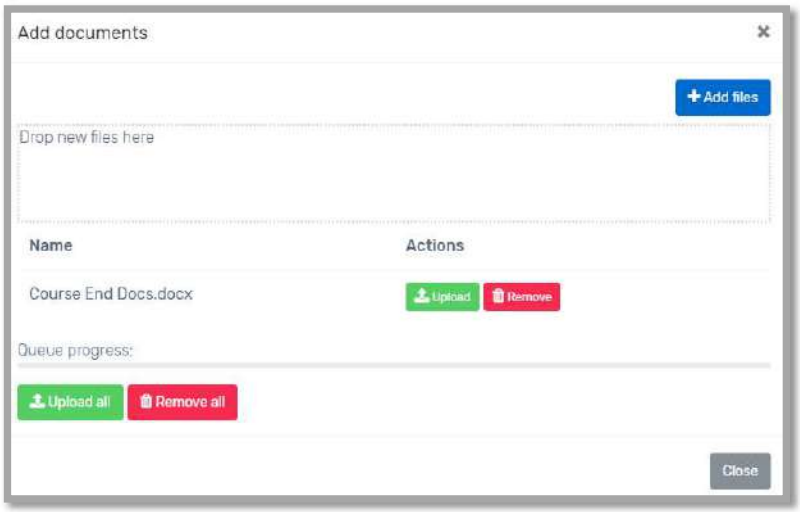
1. Front Course sheet
2. Signed Learner Agreements
3. Completed Course Lesson Plan
4. Theory and Practical Assessment Sheets as applicable for course type
5. Completed Learner Evaluation Sheets
6. Any other appropriate associated and supporting documents.

Click on 'Add' and the following pop-up will appear.



The document that you have saved can be added by clicking on the Add files button, or alternatively, be dropped in the 'Drop new files here' box – if you opt for this, we advise working on split screens to drag the file(s) over.

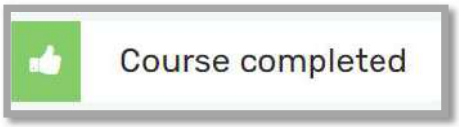
Once you have added your file(s), the screen will update.



Once you have added the required documents, click on 'Upload all', the progress bar will update, and you can then select close.

The Course End Document icon will change to green.

The flag will update to;



Your centre Administrator will now be able to request certificates. Further information on this can be found in our guide 'Course Completion'.