Ko Awatea Learn Facilitator Guide

(Face-to-face courses – manager approval required)

Facilitator guide

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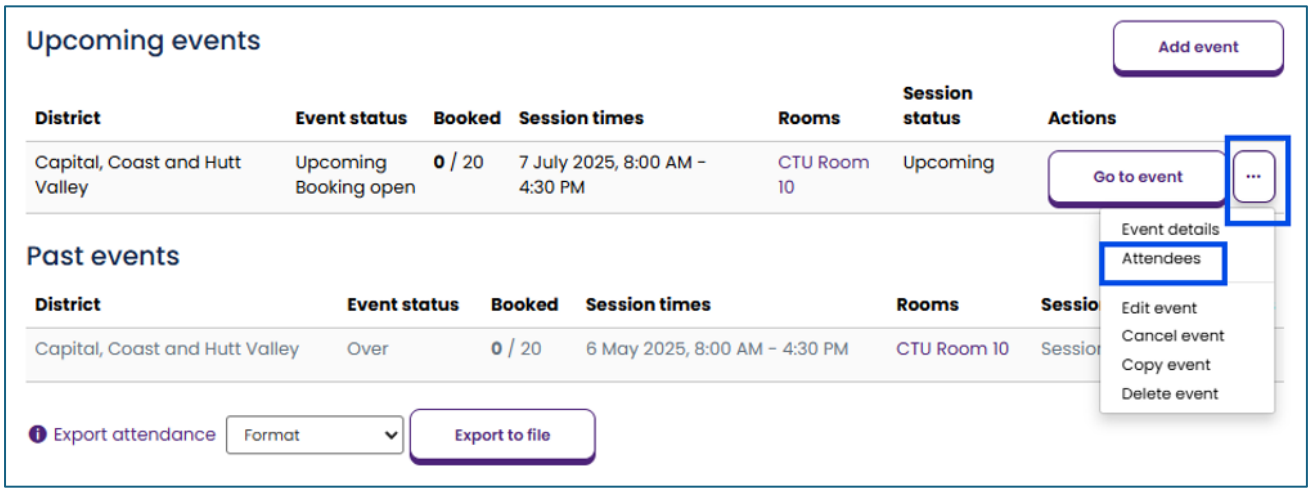
Face-to-face sessions

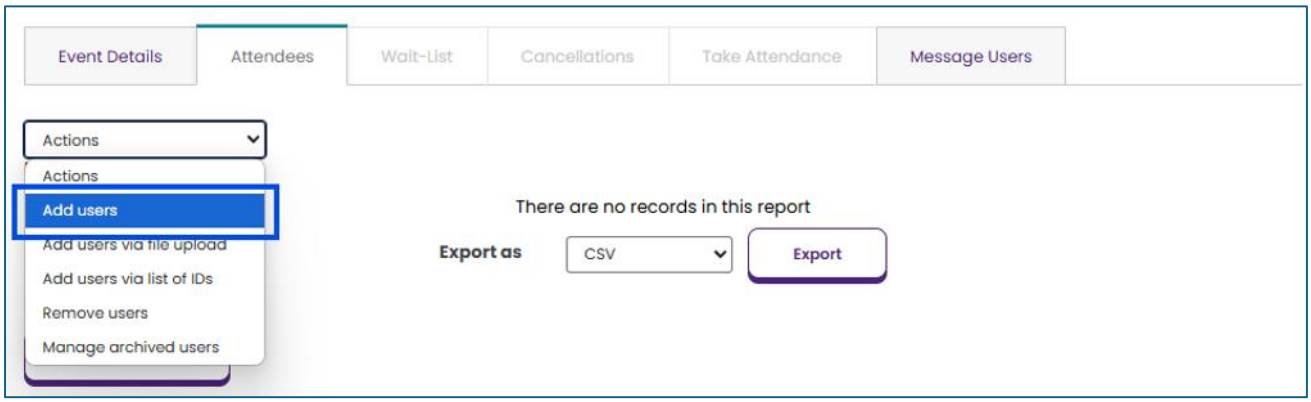
Facilitators have extra access within the Ko Awatea Learn courses that they manage. Booking staff on to a course on their behalf is part of that access. They can also add and edit sessions and take session attendance. This guide goes through instructions on how to do all of the above tasks.

Add attendees

- Find the **session date** you want to access
- Click on the **three dots** on the far right of the session date
- Click on **Attendees**

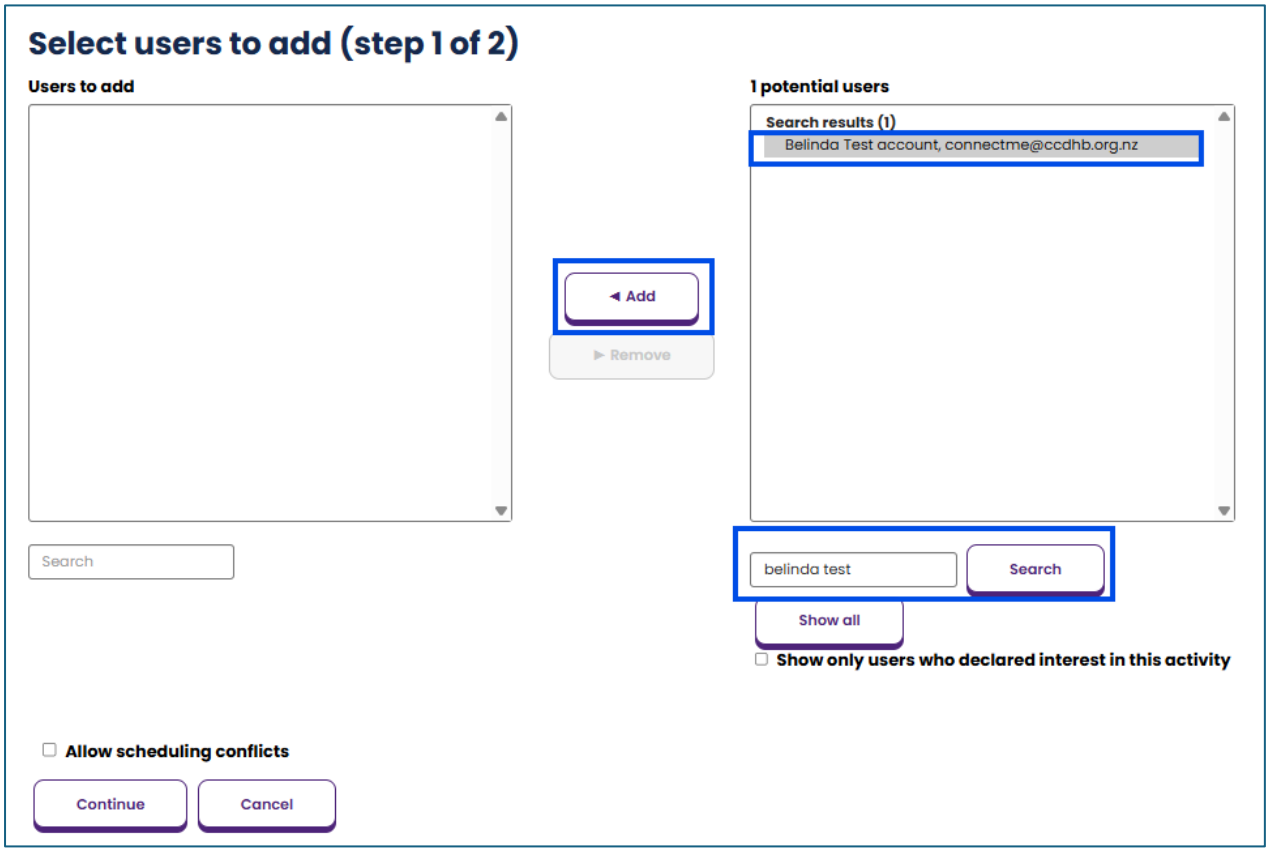


- Click on Actions – choose **Add users**

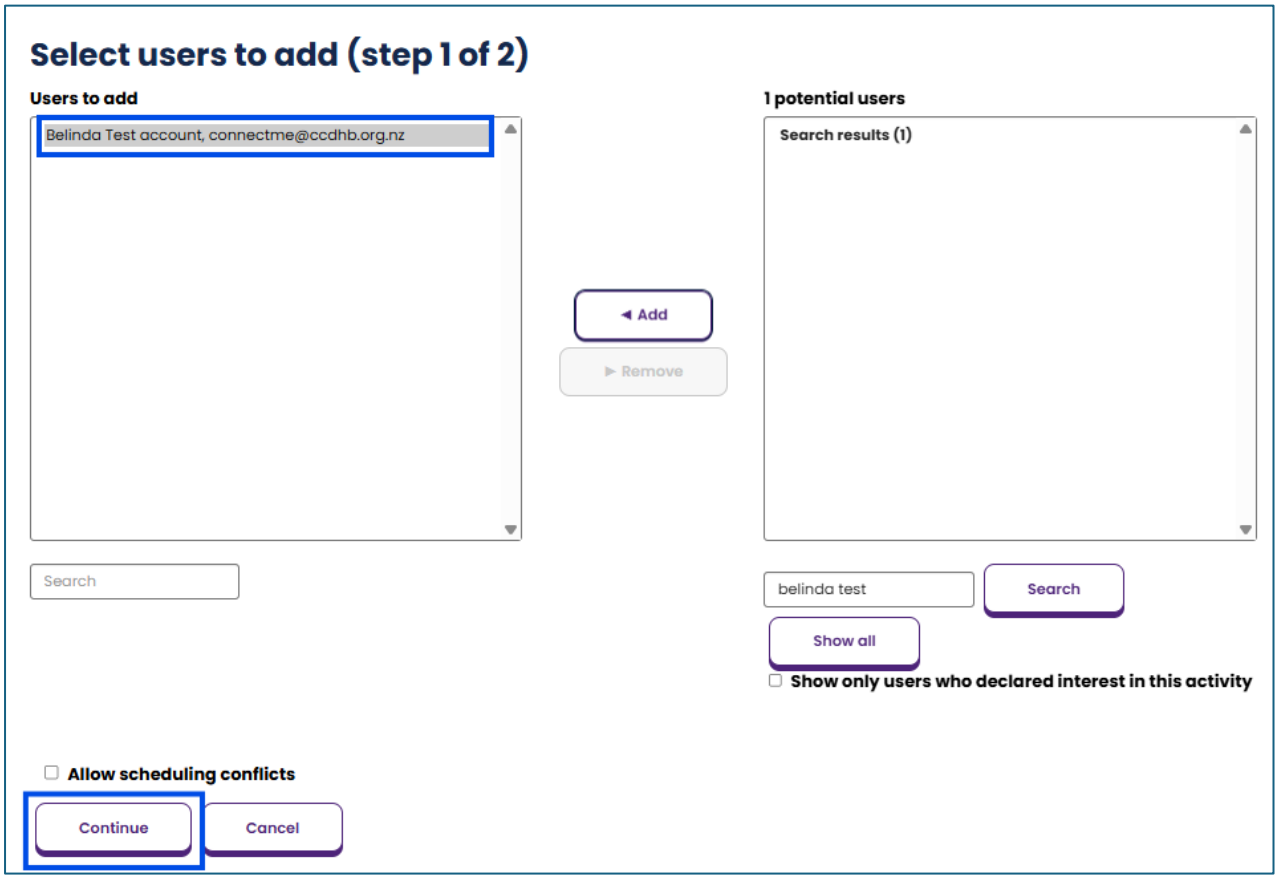


- In the **box next to the Search button** enter the name of the person to be added
- Click **Search**
- Click on the **person's name** when they appear in the list on the right-hand side, e.g. Belinda Test account – check the name and email address are for the correct district
- Click **Add**

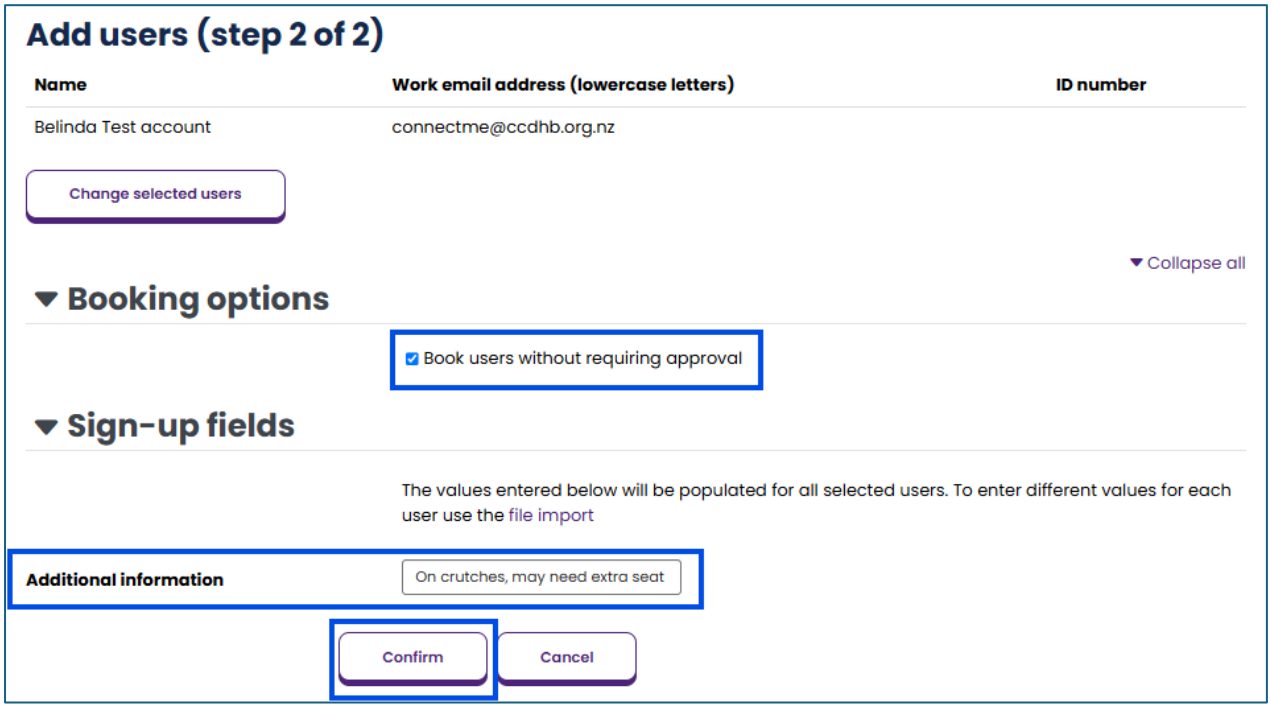
Note: *Do not tick Allow scheduling conflicts, this would allow people to be booked on more than one course at the same time.*



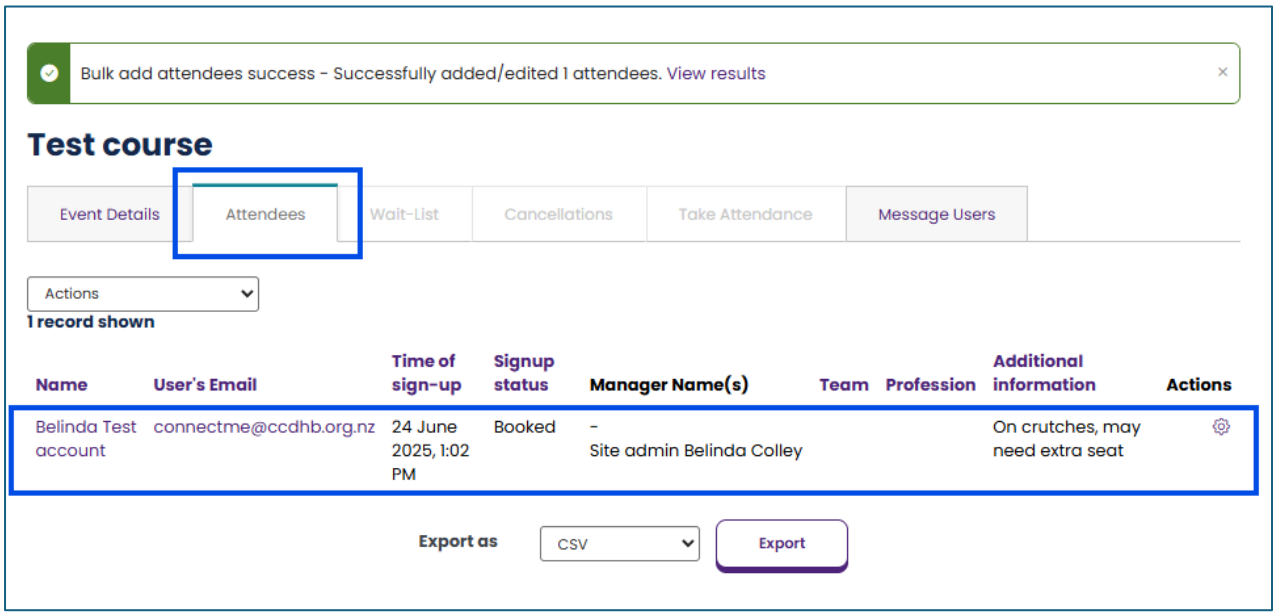
- Once the person's name is on the left-hand side, repeat the process to add any other users to the session
- **Once all users have been added** on the left-hand side, click **Continue**



- Tick **Book users without requiring approval** – this stops an approval email going to the user's manager. If you forget to tick this, the attendee will go to the Approval Required tab.
- In the **Additional information** box enter any details useful to the course facilitator to know about the user, e.g. user is on crutches so may need a chair for elevation
- Click **Confirm**



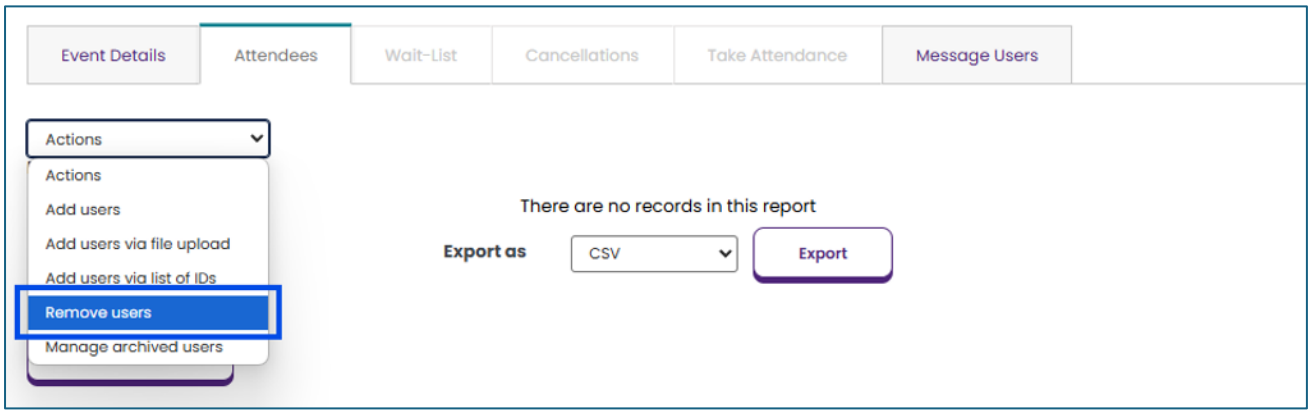
Once added to the session, the user will be listed in the course **Attendees** tab, see screenshot below.



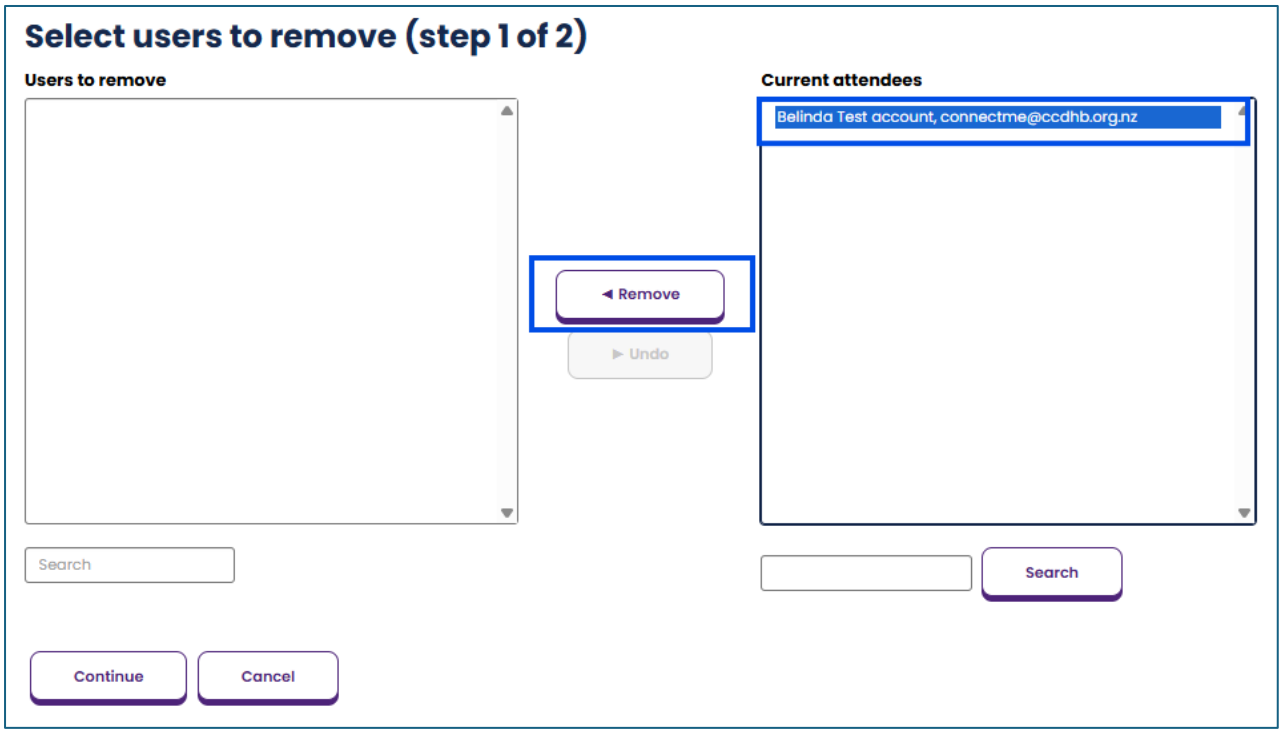
Emails: When you add a staff member to a session, they are automatically sent an email confirming they are booked on the course, including the session details, e.g. name, date, start and finish time, any details of the session. Their manager will also receive an email advising them their staff member is booked on the course and the same information about the session.

Remove users

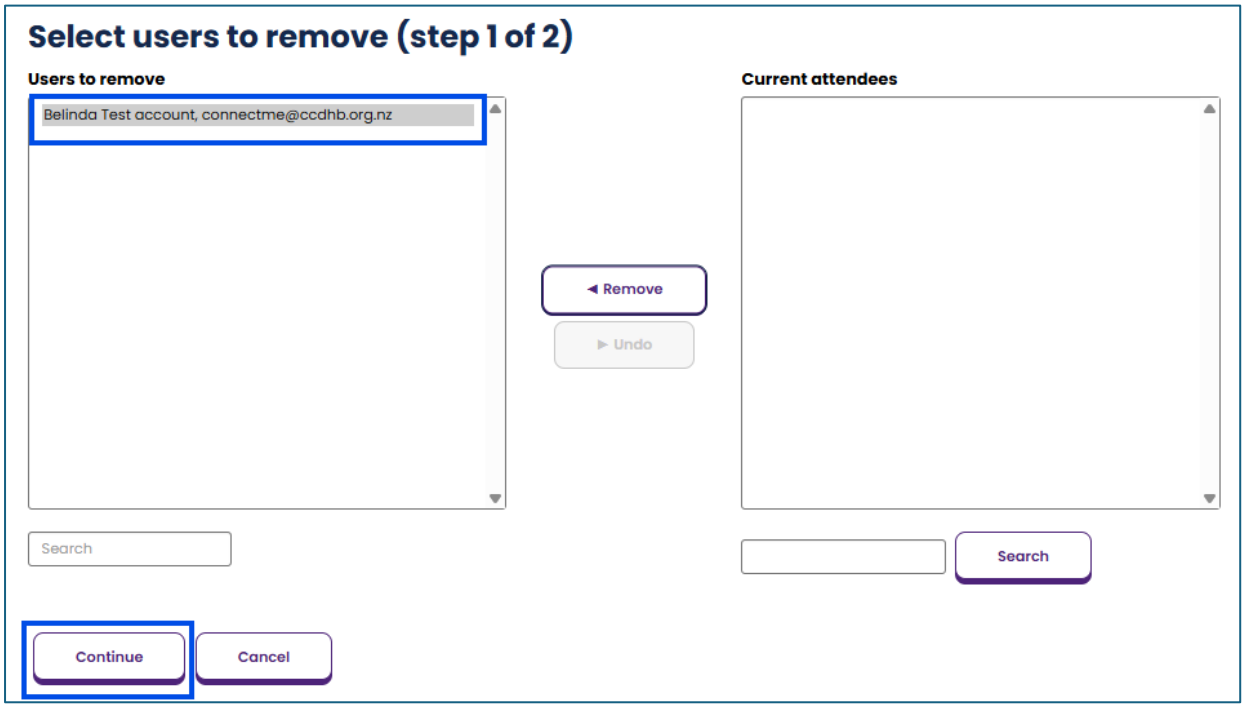
- Go to the session that the user is being removed from
- Click on **Actions** – choose **Remove users**



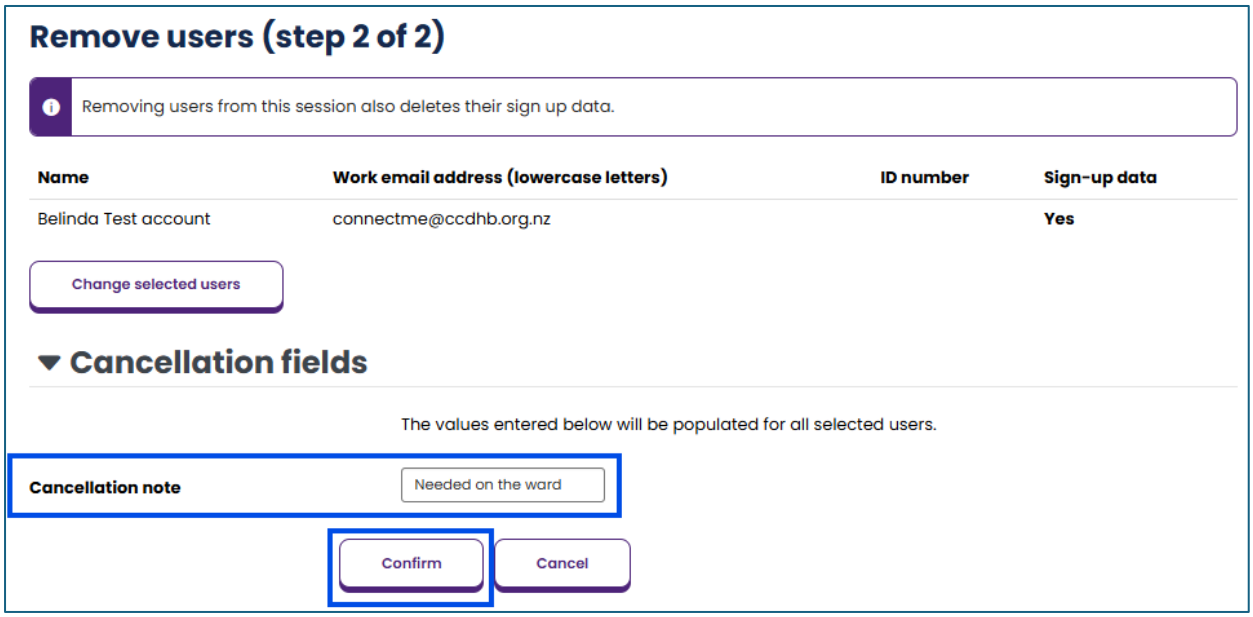
- Click on the **name of the user** you want to remove and click **Remove**



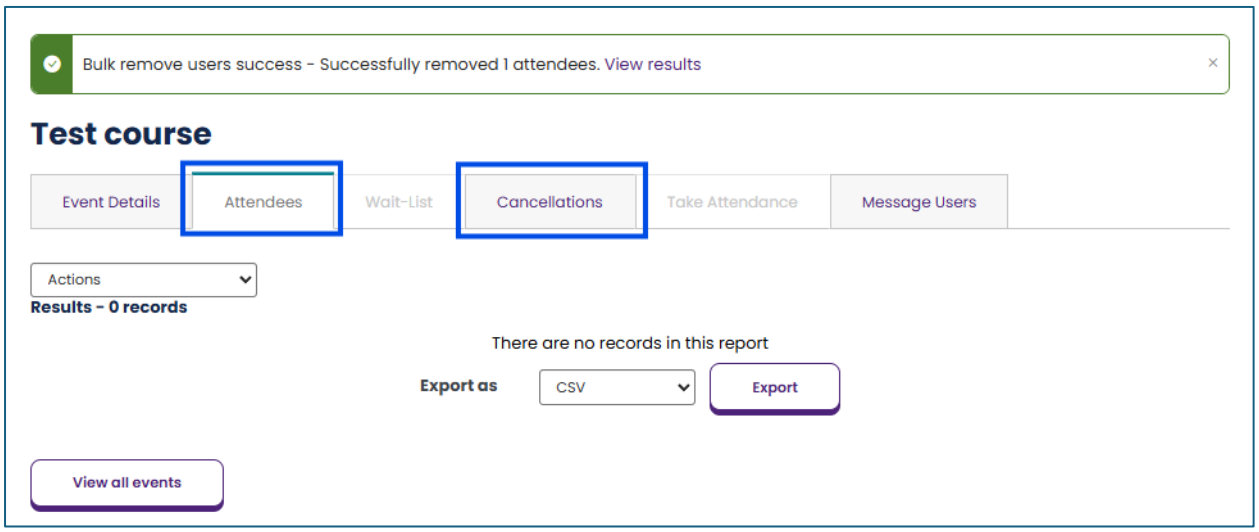
- Once the name of the user you want to remove is on the **left-hand side of the screen**, follow the same process for anyone else you want to remove.
- Click **Continue**



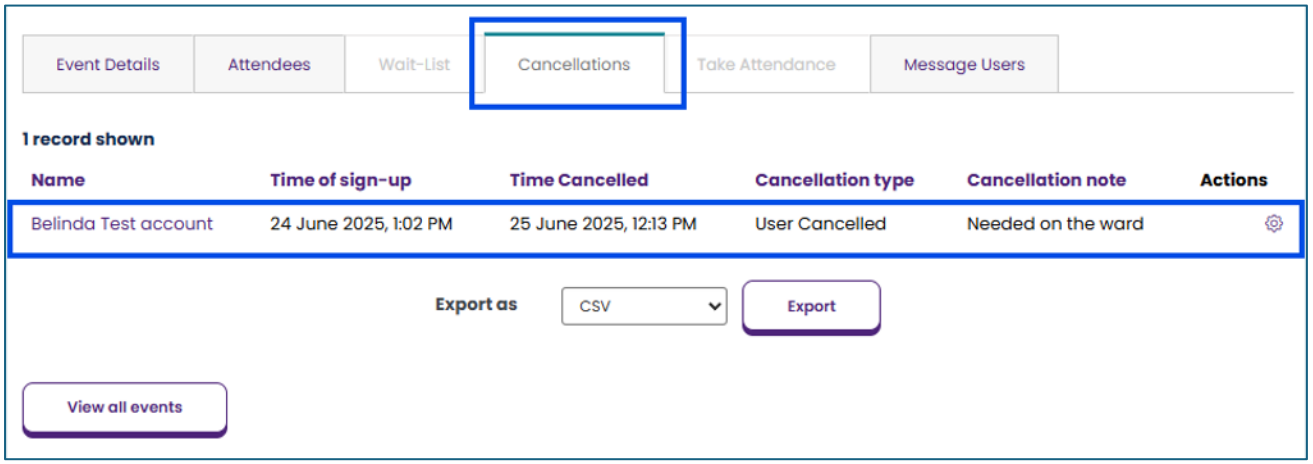
- Fill in a reason for the cancellation in the **Cancellation note**, e.g. 'Needed on the ward'
- Click **Confirm**



Once removed the user will no longer be in the **Attendees** list. They will be listed in the **Cancellations** tab, see below screenshot.

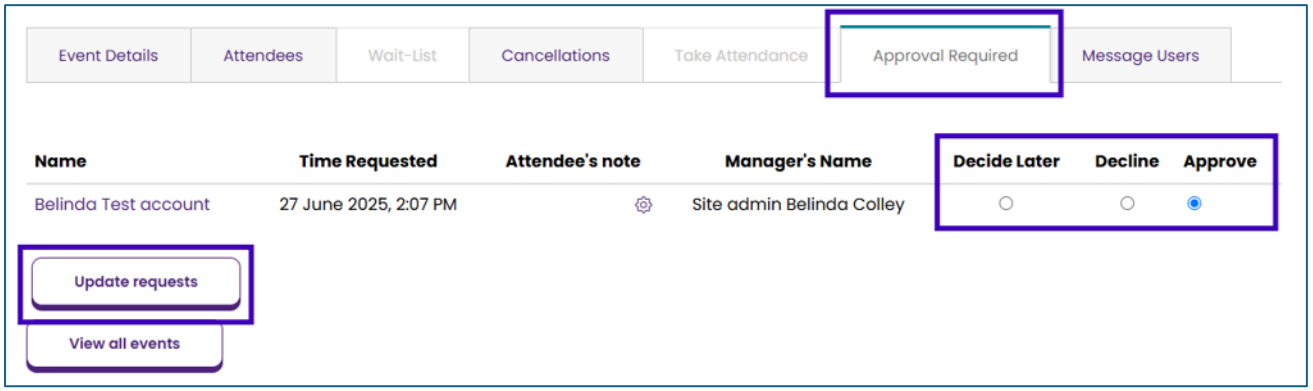


Cancellations tab - Shows the details of when the user signed up, cancelled and their cancellation reason.



Approve users

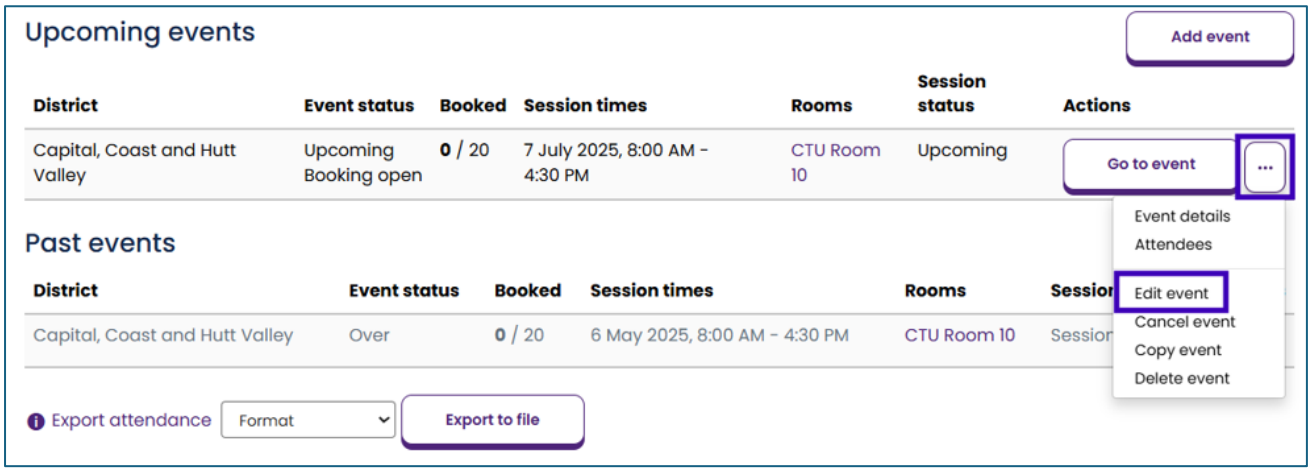
The **Approval Required** tab only appears when a person is awaiting approval. To update a request click on **Approve** or **Decline** then click **Update requests**.



Edit sessions

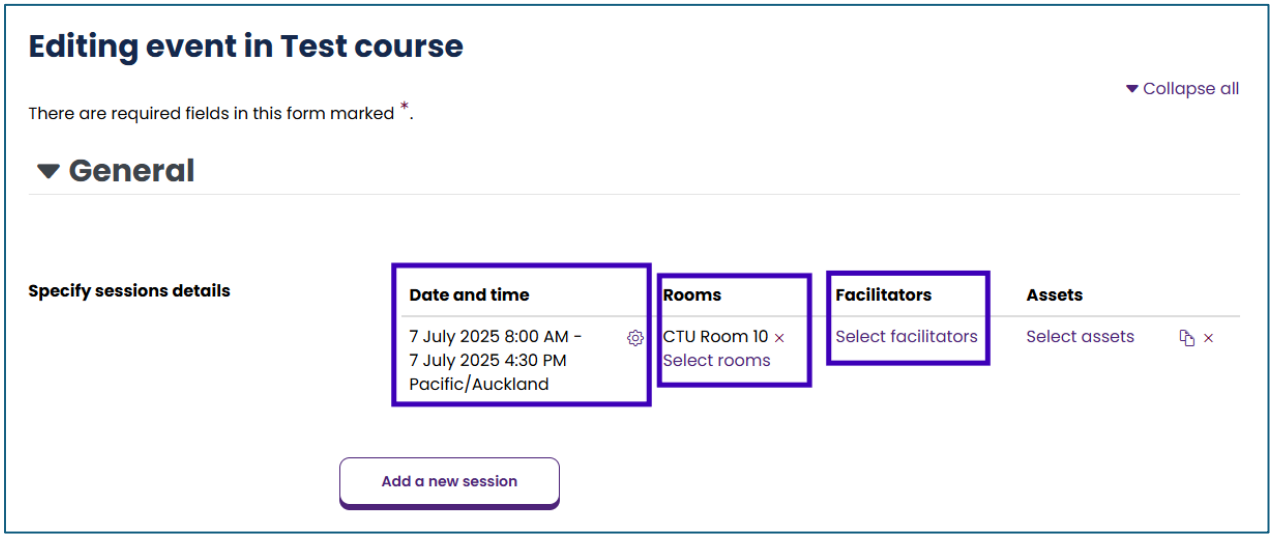
If you need to change the details of a session, the date, time, room, facilitator, maximum or minimum numbers, details, follow the below instructions.

- Click on the **three dots** on the right-hand side of the session you want to edit
- Click **Edit event**

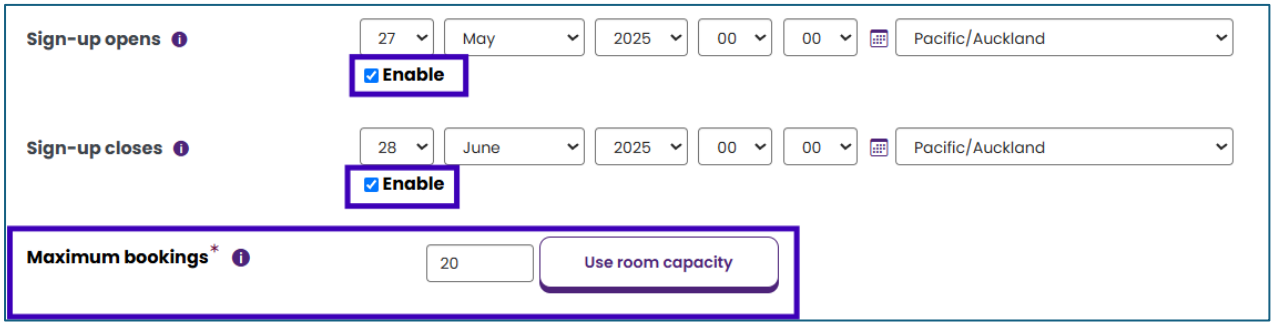


- To change the date, start time and finish time click on the **cog next to the date field** and edit the date or times in the pop-up box
- To change or select the room click on **Select rooms** and use the search function in the list that comes up to find the correct room. Use the red x to remove a room.
- Click **Select facilitators** to add in the session facilitator, use the search function

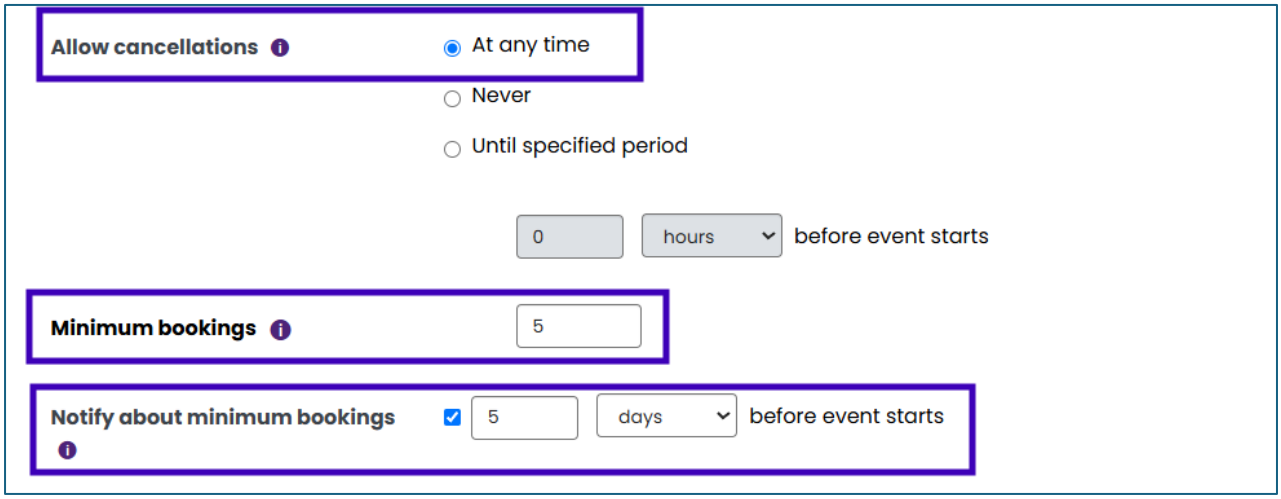
Note: The **Add a new session** button is used for courses that are held over multiple days in a row, e.g. a 2-day course for Health and Safety, both days must be added in the session. Edit the date and times in the pop-up screen that appears when 'Add a new session' is clicked.



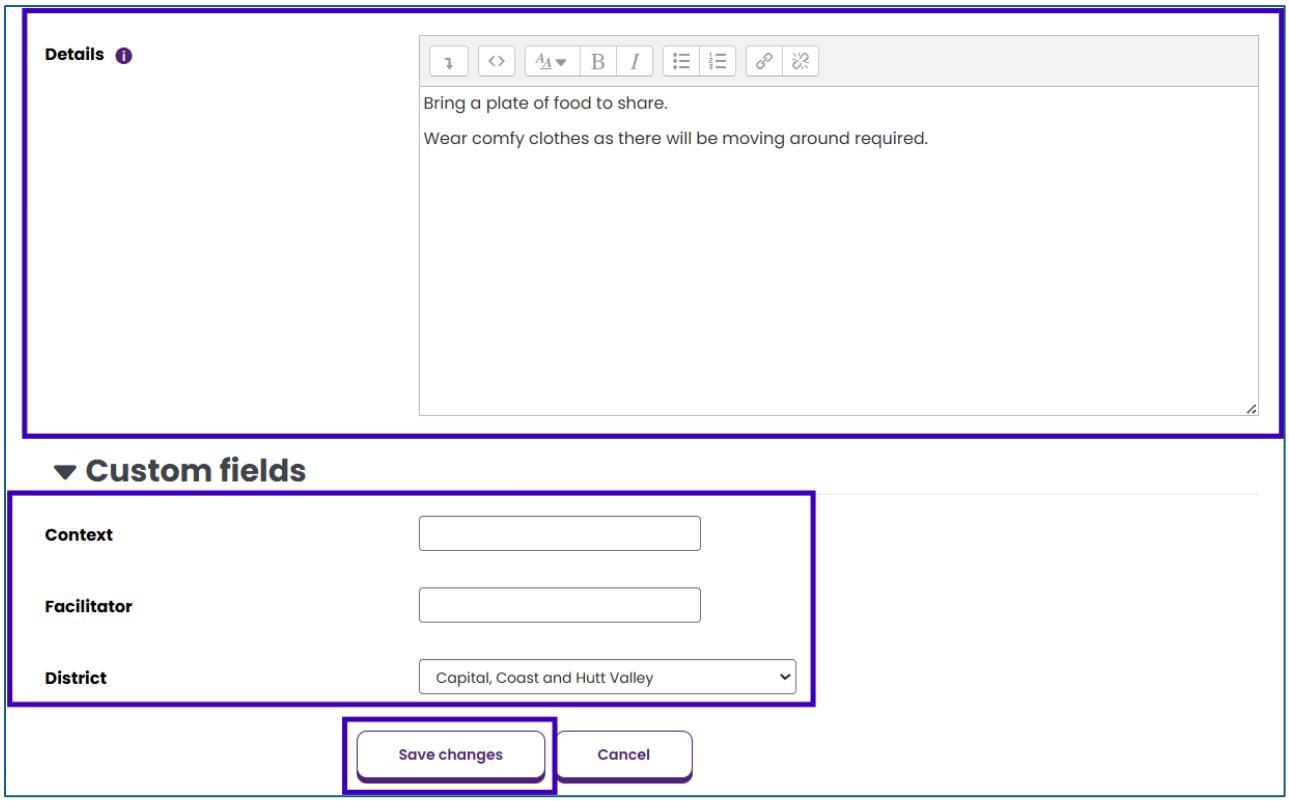
- The **Sign-up opens** field is for limiting when users can sign-up to a course. To prevent sign-up before a certain date, click **Enable** and then select the date and time from when you want staff to be able to book on the course.
- The **Sign-up closes** field is for limiting how long users can sign-up to a course. To prevent sign-up after a certain date, click **Enable** and then select the date and time from when you want to stop staff being able to book on the course.
- **Maximum bookings** is to limit how many people can sign-up to the course. You can click **Use room capacity** to auto-select the room capacity as the maximum number of people who can book on the session. Or you can manually enter the number of people.



- **Allow cancellations** – leave this as **At any time** so staff can cancel if they are sick
- **Minimum bookings** – put in the minimum number of people the course will be run for, this can be left empty
- **Notify about minimum bookings** – Tick to add and enter how long before the session date you want to be notified if the number of bookings are below your minimum number



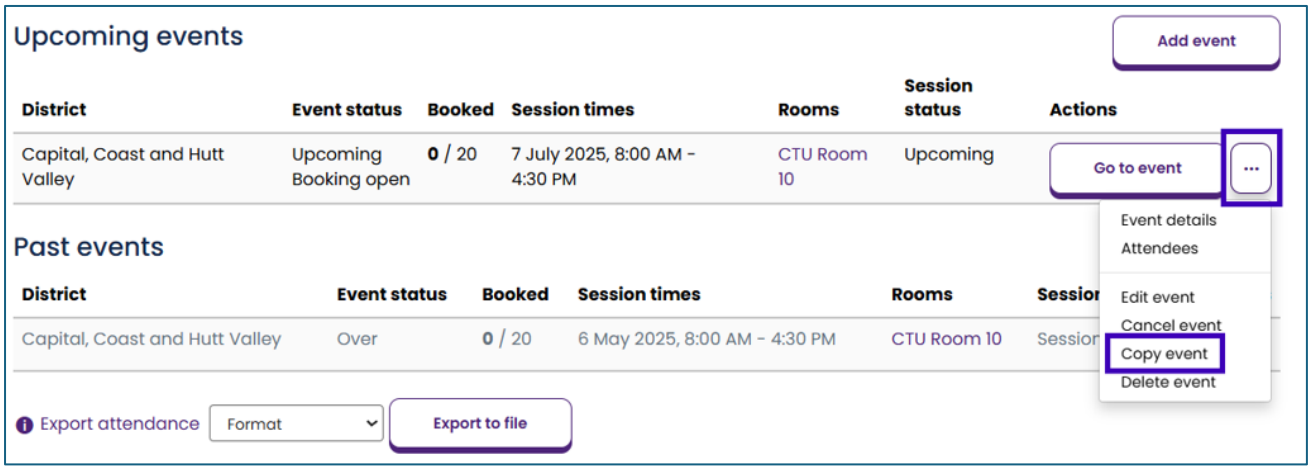
- The **Details** section is a place where you can put information about the course for the participants, e.g. things to bring on the day, pre-reading reminders. This information is in the confirmation email and the reminder email sent to participants.
- **Context** field can be used to fill in who this course could be for, e.g. only for nurses in a certain ward or service
- The **Facilitator** field doesn't need to be completed if it was completed in the date section
- **District** should be pre-populated, select the correct one if not
- Click **Save changes** once all the above details have been updated



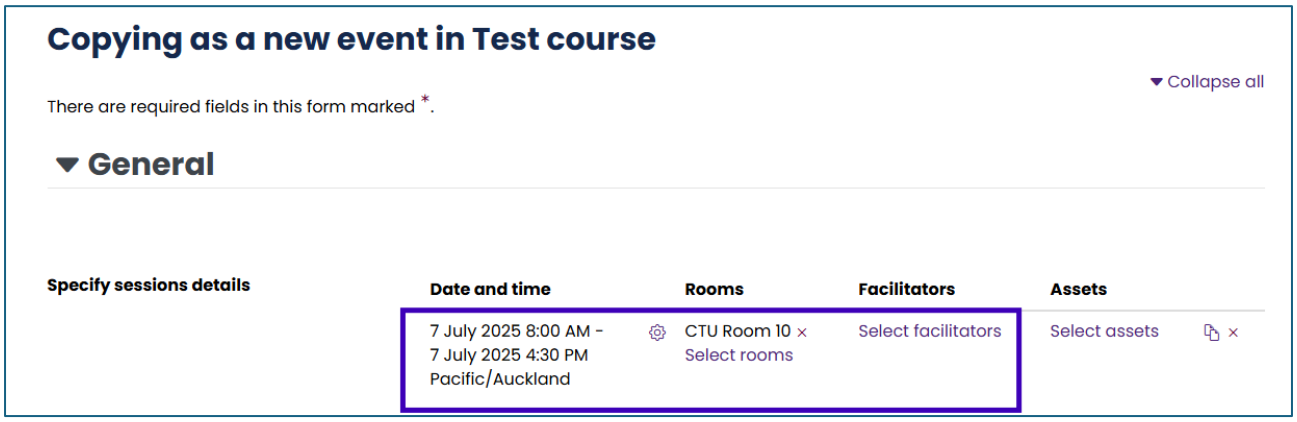
Any changes made to the session will update into the list of courses immediately. Check the session on the list of sessions and edit anything that doesn't look correct.

Copy sessions

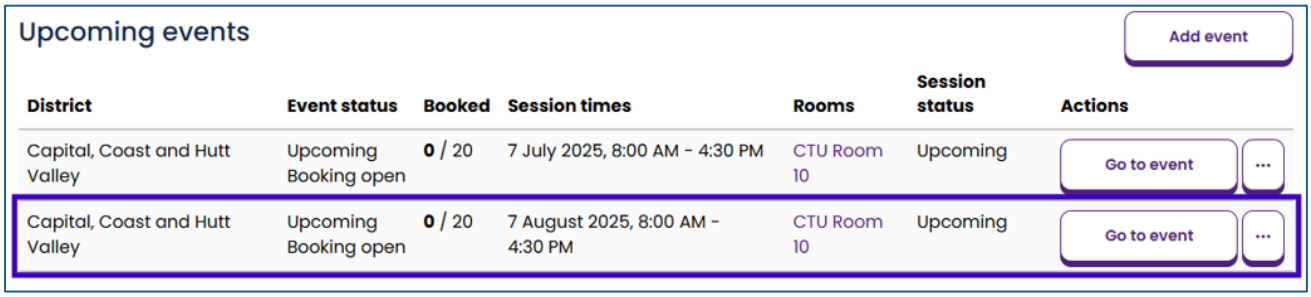
Copying sessions is the easiest way to add in additional sessions for a course. Click on the **three dots** next to an existing session and then choose **Copy event**.



Edit the details on the copy page that appears, e.g. date, time, room, facilitator. Check all the other details, edit anything else that needs to be changed. Save changes.



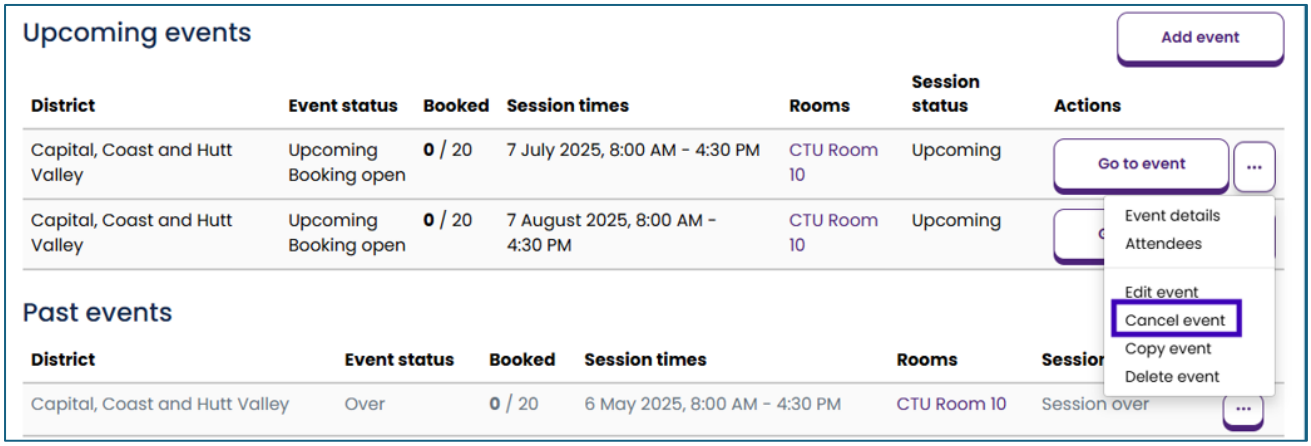
The 7 August session has been copied from the 7 July session.



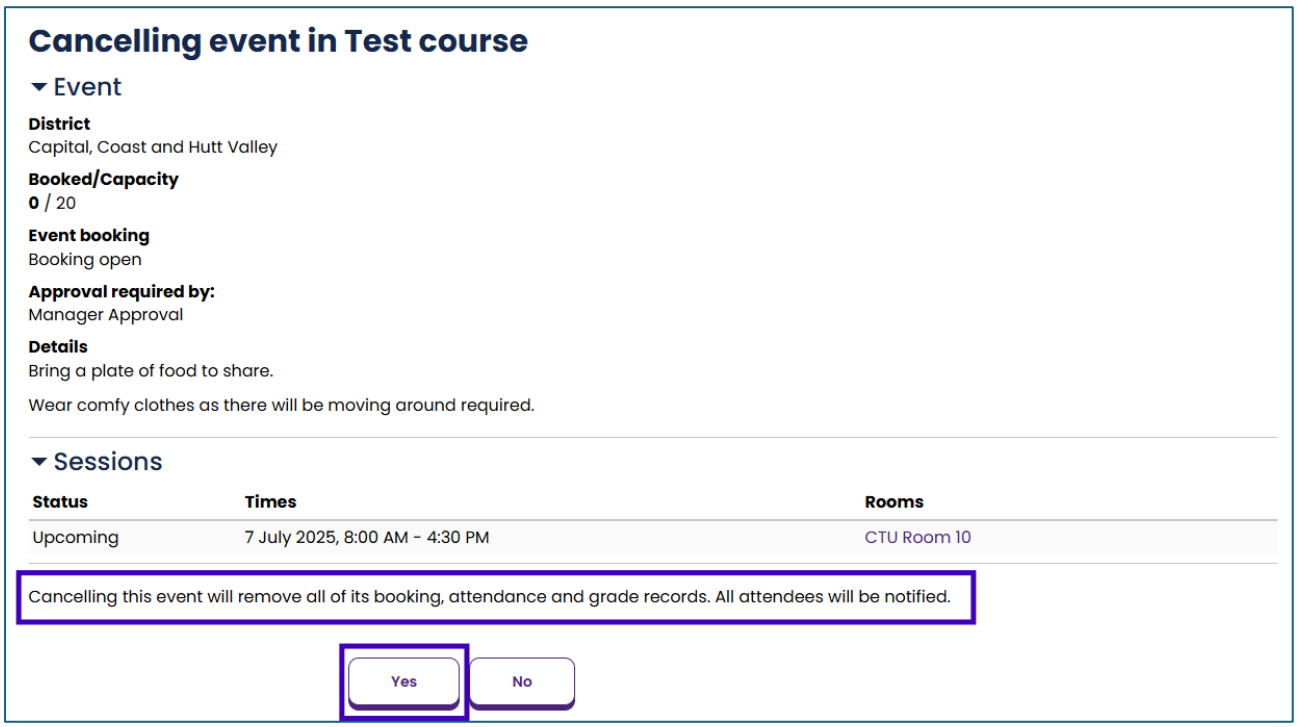
Continue copying sessions until all session dates for your course are listed. Remember to use the sign-up opens and closes fields if you don't want staff to be able to book on straight away or to close the session bookings before the session is held.

Cancel sessions

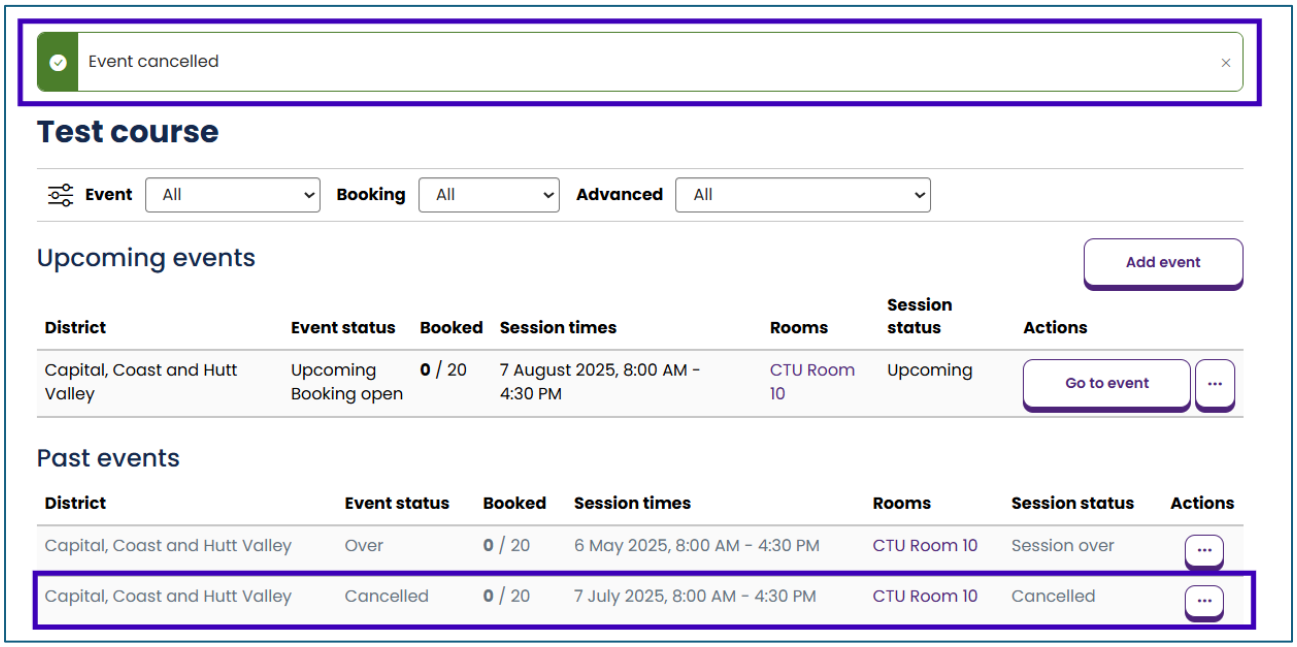
Sometimes a session must be cancelled, follow the steps below to ensure the booked attendees are advised of the cancellation. Click the **three dots** then **Cancel event**.



A warning at the bottom of the page will warn, **'Cancelling this event will remove all of its booking, attendance and grade records. All attendees will be notified.'** Before cancelling check you're in the right session date. Then click **Yes**.



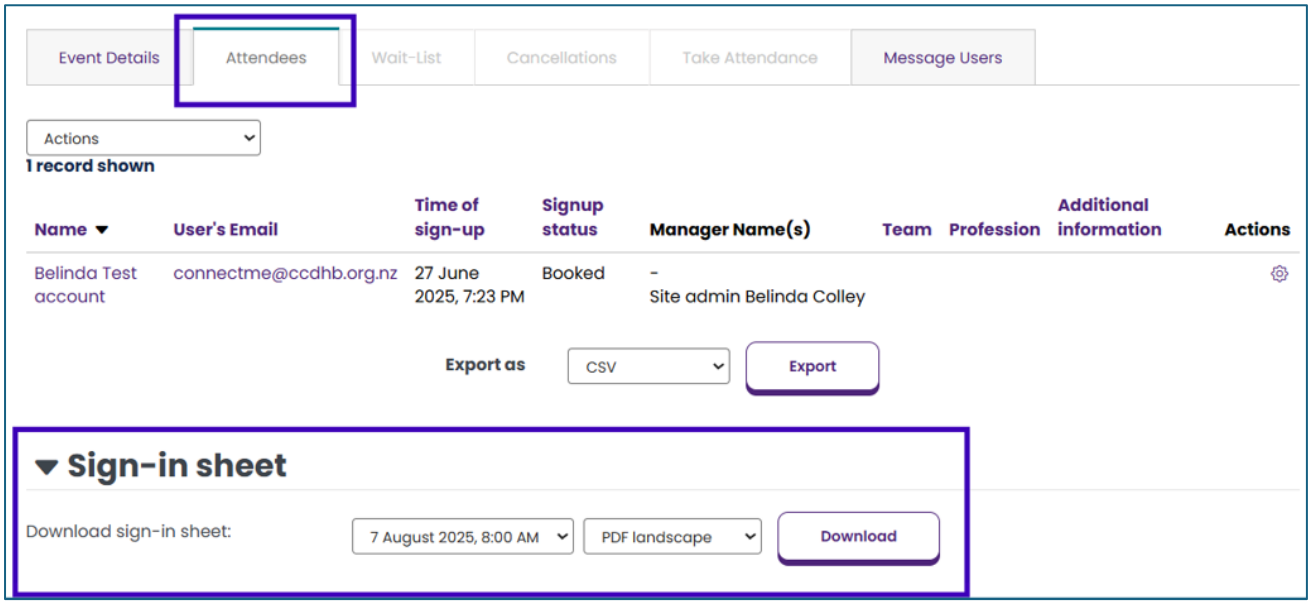
The session date will still be listed on the course page, but the session status will be **Cancelled**. A cancellation email will automatically be sent to all booked attendees and their managers.



Sign-in sheet

At the bottom of the Attendees tab and list of attendees there is the option to create and download a Sign-in sheet which can be printed to take to the session.

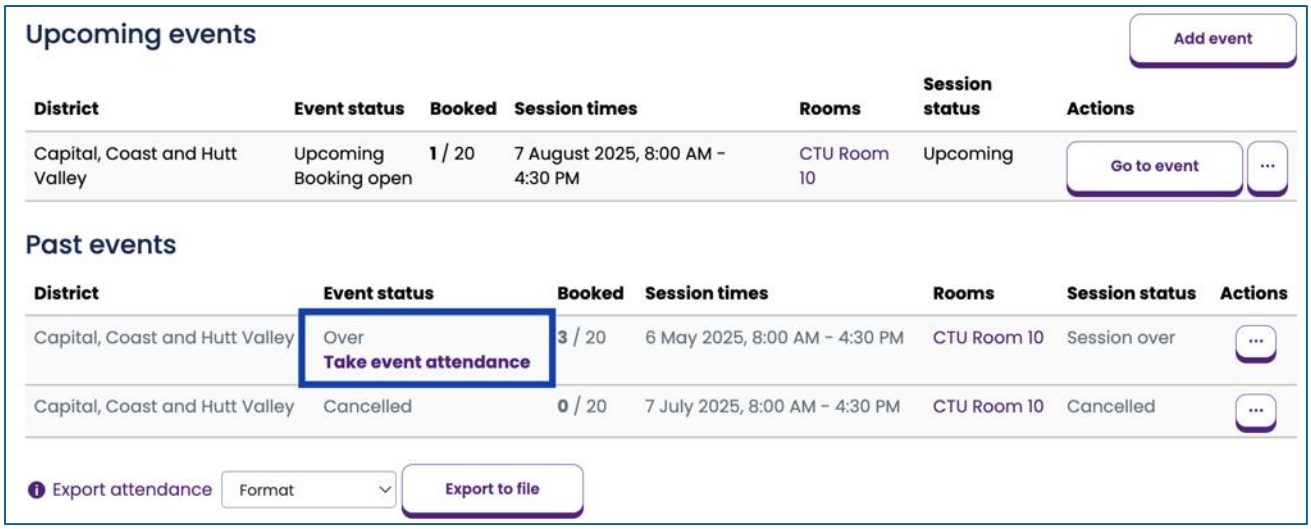
- Go to the **Attendees** tab in the correct session
- Under the heading **Sign-in sheet** at the bottom of the page
- Click on **Select session** and choose the **applicable date**
- Select the **File format,** recommended: **PDF landscape or PDF portrait**
- Click **Download**, this will download in your browser and be **available to print**



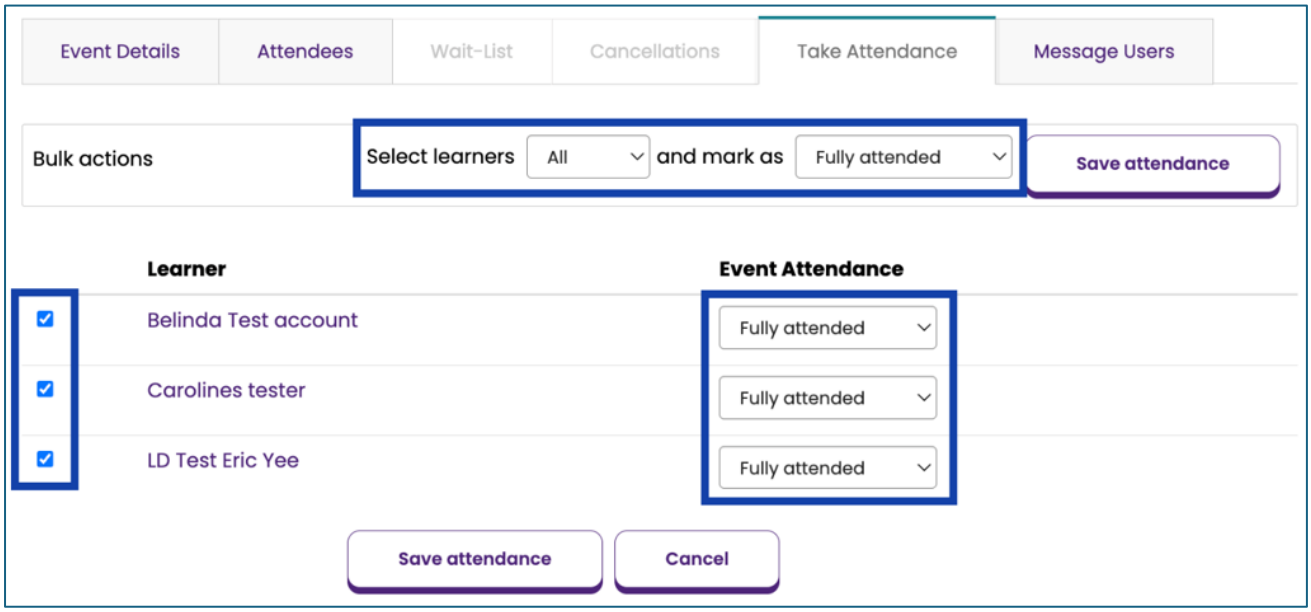
Take attendance

After the session is over, you will need to update the attendance of all the people who were booked on the course. It is important to update attendance as it affects the learning records for the course attendees.

- Go to the list of sessions for the course
- **Take event attendance** appears in Event status under courses where the attendance needs to be updated
- Click **Take event attendance** to mark attendance



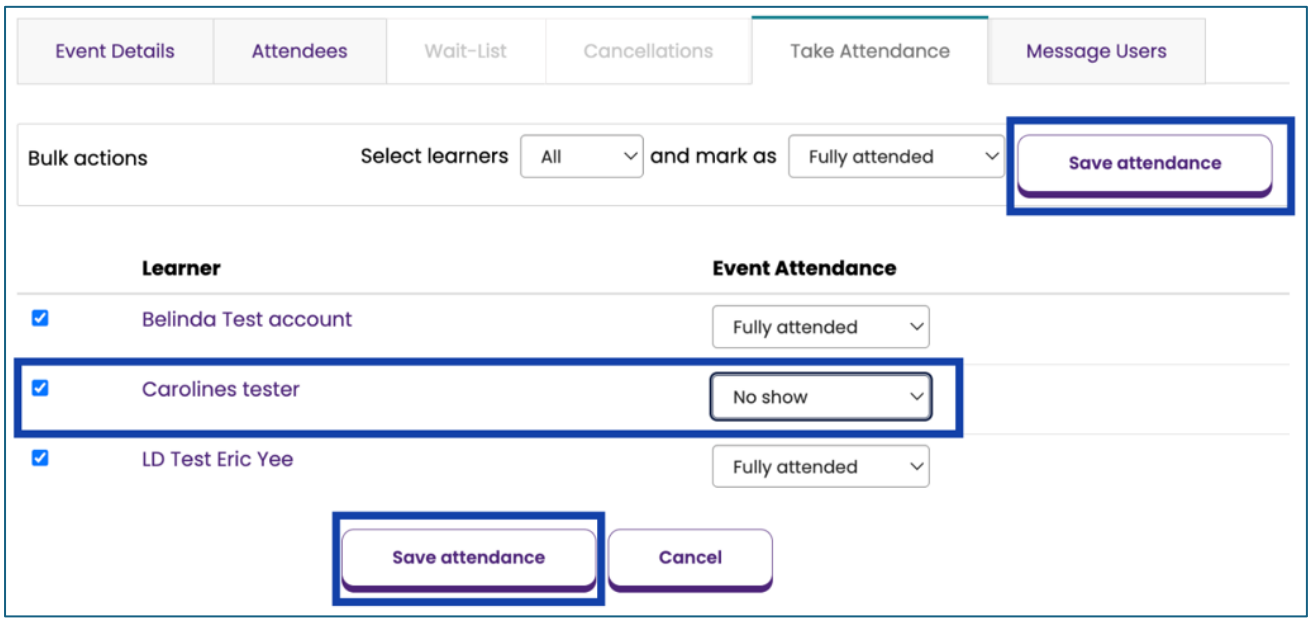
- In the **Take Attendance** tab from the **Select learners** dropdown menu choose **All**. This will put a **tick** on the left-hand side of all the Learners.
- Then in the '**and mark as**' dropdown menu choose **Fully attended**. This will mark everyone as Fully attended. **DO NOT CLICK** Save attendance unless everyone listed did fully attend.



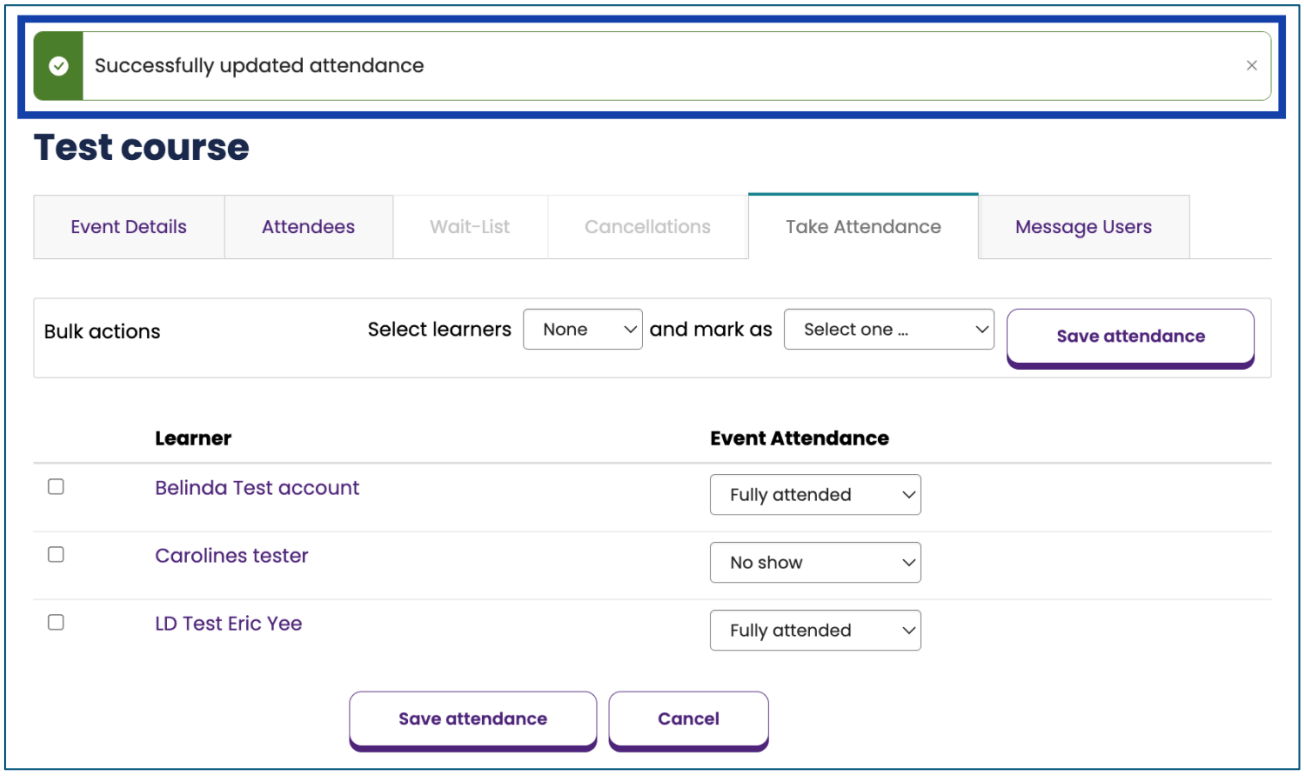
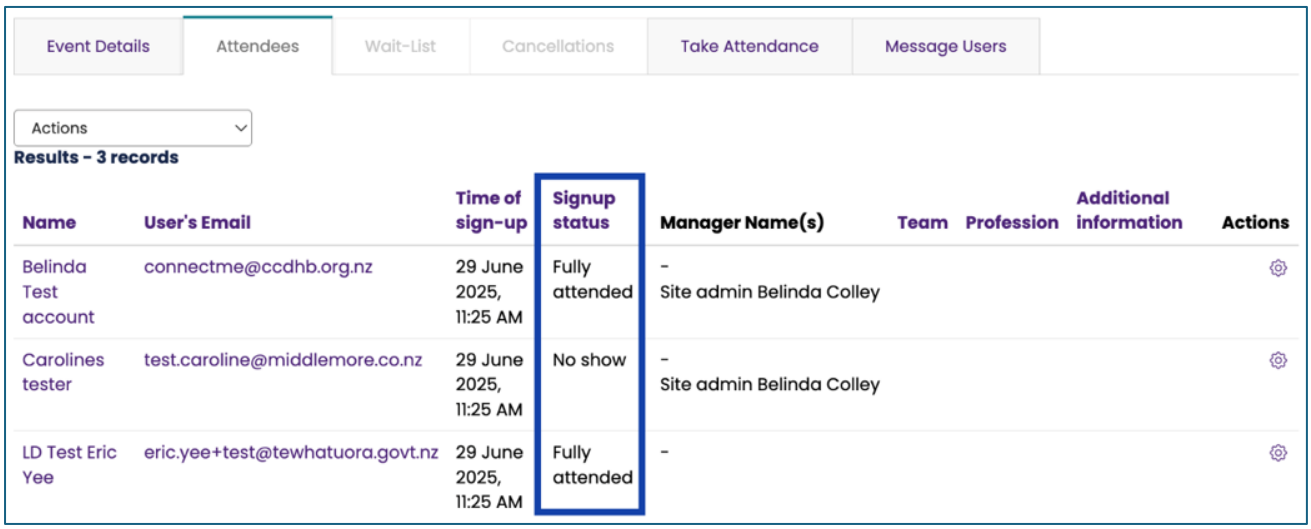
- By using the dropdown list next to each person, **manually change the attendance** of anyone who didn't attend to either No show or Unable to attend.

Note: There is also a Partially attended option, if this is used the person who partially attended will need to complete an additional session to complete the face-to-face part of the course.

- Once everyone has the correct attendance marked, click either of the **Save attendance** buttons



A message at the top of the screen will confirm that attendance has been marked.



Once attendance has been marked, the Sign-up status in the Attendees list will be updated to show each person's attendance, e.g. Fully attended, no show.