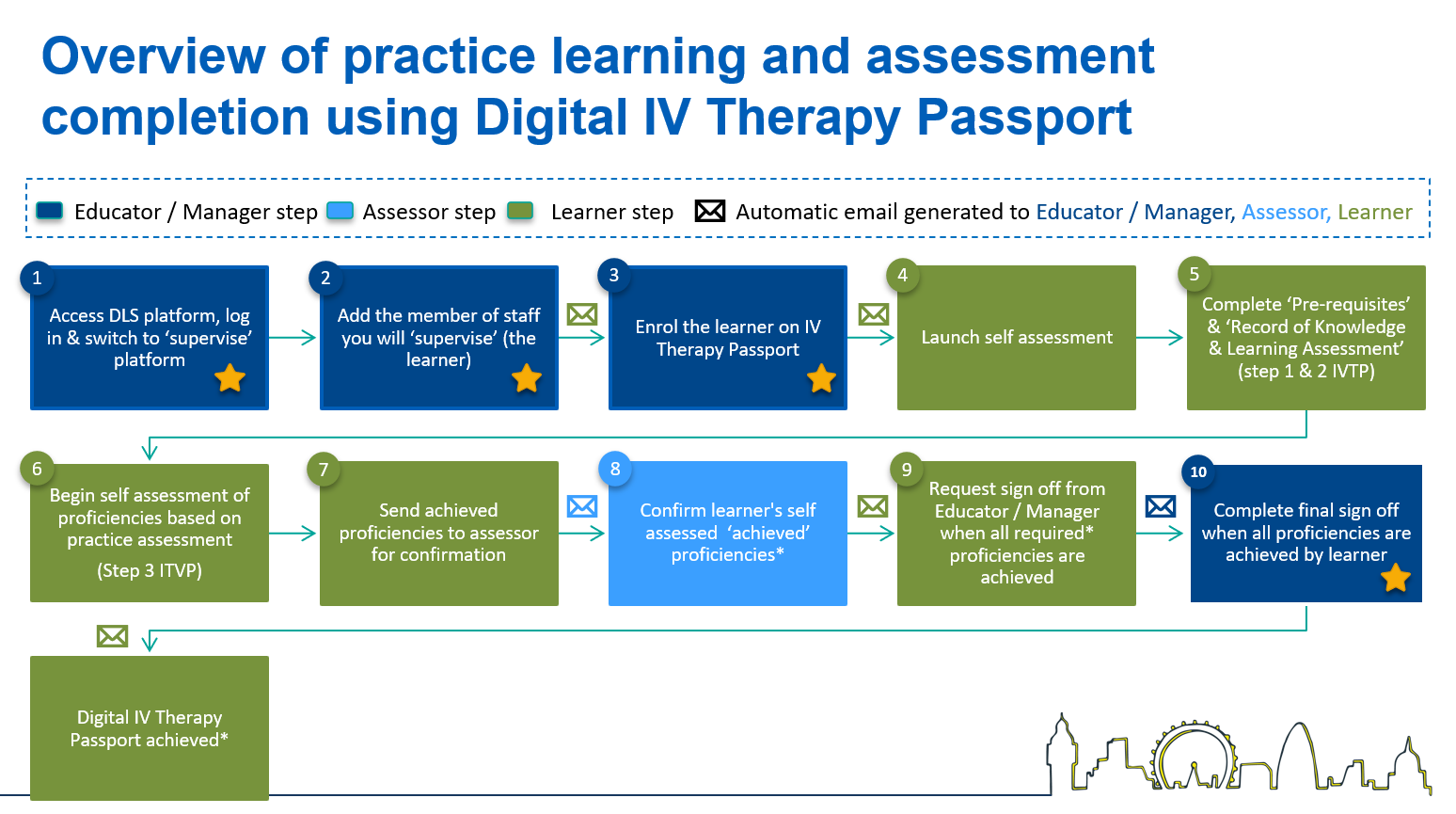
**Digital IV Therapy Passport – Educator/Manager User Guide**

The Digital Learning Solutions (DLS) platform, provided by the Technology Enhanced Learning (TEL) Team within Health Education England (HEE), hosts the Digital IV Therapy Passport.

This documentation is designed to provide first time access guidance to an **Educator/Manager**.





Indicates the Educator/Manager steps in the process

**For information:**

* **The learner**: Person completing the self-assessment in the IV Therapy Passport
* **The Educator / Manager**: the person who is facilitating the passport and will ultimately sign it off when all proficiencies have been assessed.
* **The Assessor**: the person supervising, completing practice assessment and confirming achievement of proficiencies.

**For support, please contact:** the local clinical centre manager or administrator at your organisation.

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# **Essential guidance**

## **Log in procedure**

|  |  |  |
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| **STEP** | **Visual location** | **Guidance** |
|  | location of DLS login page | For information:  Before you can proceed, you should have a DLS account and your clinical centre manager will have assigned you as an Educator / Manager on the system.  Access via the [DLS platform](https://www.dls.nhs.uk/v2/Home/Welcome)  Select: **Log in** |
|  | Log in credentials interface | Log in using your **email address** and the **password** set up at registration  Select: **Log in**  For information:  Educators / Managers may also have a delegate user ID to access the system – this should be disregarded. **Always use your email address.**  Forgotten your password? [Follow the guidance](#ForgotPassword) available. |
|  |  | Select: **Switch application** |
|  |  | **Learning Portal**: enables the Learner to complete an assessment  **Supervise**: takes all those acting as educator/manager or assessor to the platform to work in these roles  Select: **Supervise** |

## **Add learners to supervise and invite to register**

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| **STEP** | **Visual location** | **Guidance** |
| **1.** | supervisor dashboard | For information:  First, the **Educator/Manager** will need to add a **Learner(s)** onto their supervision list and then enrol them on a self-assessment.  Select: **View My Staff List** |
| **2.** |  | Add the **email address** of your learner(s) and then select: **Submit**  Alternatively add multiple staff members |
| **3.** | my staff interface with options to add members of staff emails | For information:  If the staff member(s) have already registered with DLS, then they will be added into your supervision list, and they can be [enrolled onto the self-assessment](#Enrol).  If the staff member(s) have not registered with DLS, then they will receive an email inviting them to register. You will receive an email when they accept the invite. They can then be [enrolled onto the self-assessment](#Enrol).  When you have finished follow the [Log out](#Logout) procedure |

## **Enrol learners to self-assessment**

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| **STEP** | **Visual location** | **Guidance** |
|  |  | For information:  The **Educator/Manager** will need to enrol the **Learner** onto the IV Therapy Passport before the learner can start their self-assessment.  Select: **My staff** |
|  | my staff interface, view self assessments option | Select: **View self assessments** |
|  |  | Select: **Enrol on new assessment** |
|  | enrol on self assessments interface | Choose a self-assessment then  Select: **Next** |
|  | setting a date for IV Therapy Passport | For information:  At this point you can select an optional completion date for the staff member.  Leave the boxes blank if you don’t want to specify a completion date.  Select: **Next** |
|  | choosing supervisor role options | Select: **Educator/Manager**  Select: **Next** |
|  |  | For information:  Prior to completing the enrolment, you can review and change the information you have entered.  Select: **Confirm** when you are ready to proceed.  For information: The staff member is now enrolled onto the self-assessment.  When you have finished follow the [Log out](#Logout) procedure |
|  | example of confirmation email | For information:  The staff member (Learner) will receive a notification informing them that the self-assessment is available for completion. |

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## **Self-assessment final sign-off**

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| **STEP** | **Visual location** | **Guidance** |
|  | example of sign off email request | For information:  When the learner has completed **all** their core and optional proficiencies and they have been [reviewed and confirmed by their assessor](#Review),the Educator/Manager will receive an email notification requesting them to **Sign off** the passport and complete the declaration. |
|  |  | Follow the [Log in procedure](#Access) |
|  |  | Go to the **Supervisor Dashboard, Your to do list**  Select: **Review and sign off** |
|  |  | If you are content that the learner has completed the following with appropriate assessors, then proceed to sign off:   * Prerequisites to supervised practice * Record of learning and knowledge assessment * Completed all core and the required optional proficiencies (minimum for role and at least one of each method of prep/ admin and one vascular access device proficiency)   Select: **Sign-off self-assessment** |
|  | Sign-off profile assessment or reject | Complete the **Reviewer comments**  Select: **Sign-off profile assessment** or **Reject** as appropriate  Select: **Submit** |
|  |  | Scroll down to the bottom of the screen to view the **Status** |
|  | overall progress interface | For information:  When viewing the self-assessment from My staff list, you can also see the status highlighted in green **Signed off** |
|  | email confirmation example | For information:  The learner will receive a confirmation email when the passport has been signed off |

## **Log out** procedure

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| **STEP** | **Visual location** | **Guidance** |
|  | mMy account interface | Select:**My account**  Select: **Log out**  For information:  If you need to change your password:   * Select: **Change password** * Return to: **My account** * Select: **Log out**   If you need to change any of your registration details, select **Edit details**.  Don’t forget to select **Save** when you are finished. |

# **Additional guidance**

## **Self-assessment results review and confirm** (this is *usually* the assessor’s role but may be appropriate for some Educators /Managers)

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| **STEP** | **Visual location** | **Guidance** |
| **1.** | email notification example | For information:  The Educator/Manager can confirm learner’s self-assessed proficiencies if this is appropriate (this is usually the assessor’s role).  They will receive a notification email when a learner submits self-assessment results to them for review.  Select: **Click here**  Alternatively, access DLS:  <https://www.dls.nhs.uk/v2/Home/Welcome>  Then follow the [Log in procedure](#Access) |
| **2.** | Select: Dashboard and then  Select: View My Staff List | Select: **Dashboard** and then  Select: **View My Staff List** |
| **3.** | Select: View self-assessment for the staff member you are reviewing. | Select: **View self-assessment** for the staff member you are reviewing. |
| **4.** |  | Select: **Review** |
| **5.** |  | For information:  Guidance notes are visible when proficiencies are confirmed singularly but not when confirming multiple proficiencies.  There is **not** an option to select ‘reject’ and record an action plan when confirming multiple proficiencies – these would need to be confirmed by each proficiency and rejected.  Confirmation requested results are highlighted in yellow.  Select: **Confirm** by each proficiency or  Select: **Confirm multiple results** |
| **6.** | *When selecting reject you are required to add an action plan.* | Select: **Confirm** or **Reject** as appropriate.  For information: when selecting reject you are required to add an action plan.  Select: **Submit** |

1. **Review and update self-assessment results with an Action Plan**

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| **STEP** | **Visual location** | **Guidance** |
|  |  | To review a proficiency action plan, Select: **View (action plan)** |
|  | Update a rejected result | Select: **Update** |
|  | Submit self-assessment response | Record a response and select: **Submit**  For information:  when selecting ‘reject’ you are required to add an action plan before submitting the assessment. |
|  | Confirmed results turn green on-screen | For information:  The confirmed results are highlighted in green  When you are finished follow the [Log out procedure](#Logout) |
|  | email example of confirmed results | For information:  As their proficiency results are confirmed, the learner will receive an email. |

## **Remove a member of staff from your supervision list**

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| **STEP** | **Visual location** | **Guidance** |
|  | supervisor dashboard | Select: **View My Staff List** |
|  | expansion options | For information:  You can use the search funtion to find staff on your supervision list  Select: **Expand +** next to the member of staff you want to remove |
|  | removing staff option | Select: **Remove staff member** |
|  | confirmation of staff removal | Confirm remove staff member  Select: **I am sure**  Select: **Remove** |
|  | Confirm that you want to remove a staff member | For information:  There is an on-screen warning about the implications of removing the staff member. If you are sure that you no longer need to review this staff members self-assessment, you can proceed  Select: **Remove**  Alternatively you can **Cancel** the action |

## **Send a reminder** to a member of staff from your supervision list

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| **STEP** | **Visual location** | **Guidance** |
|  | view staff list on supervisor dashboard | Select: **View My Staff List** |
|  | view self assessment | Select: **View self-assessment** for the staff member you are reminding. |
|  | send reminder option for self assessments | Select: **Send reminder** |
|  | email reminder | For information: the delegate will receive an email, to their registered email account, reminding them to complete their assessment. |

## **Nominate a member of staff as an assessor (nominated supervisor)**

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|  | Log in landing page | Access the [DLS landing](https://www.dls.nhs.uk/v2/Home/Welcome) page  Select: **Log in** |
| **2.** | supervisor dashboard | Select: **Dashboard** and then  Select: **View My Staff List** |
| **3.** | expansion option | For information:  You can use the search funtion to find staff on your supervision list  If you do not see the name of the assessor on your staff list you should add them from **Add member of staff** at the bottom of the screen. The assessor you are adding will need to be a registered DLS delegate.  The member of staff will be added to your **Staff list**  Select: **Expand +** next to the member of staff you want to remove |
| **4.** | Select: Promote to nominated supervisor | Select: **Promote to nominated supervisor** |
| **5.** | confirmation of nominated supervisor | Confirm nominated supervisor  Select: **I am sure**  Select: **Confirm** |

## **Forgotten the password**

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|  | Log in landing page | Access the [DLS landing](https://www.dls.nhs.uk/v2/Home/Welcome) page  Select: **Log in** |
|  | Forgot password option | Select: **Forgot password** |
|  | Reset password option | Enter your **email address**  Select: **Reset** |
|  | Confirmation message | For information: You’ll see an onscreen confirmation message |
|  |  | You’ll receive a email that provides a 2 hour time limited reset link  Select**:** the **link** |
|  | Reset password | Complete the fields  Select: **Reset password** |
|  | Login option | Select: **Login** |
|  | Account locked | For information:  If at any time you receive an **Account locked** message, you should follow the [Forgot password](#ForgotPassword) process |

**For support, please contact:** the local clinical centre manager or administrator at your organisation.