



# Registr8 User Guide

*This document provides information to support you in the operation of the Registr8 registration and certification system*

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# Introduction

Our online registration and certification system, Registr8, allows you to process information efficiently and quickly. You can register and certificate learners, produce reports, retrieve and view learner information and also access invoices and monitoring reports.

Those people named as requiring access to the Registr8 system will receive an automatic email asking them to create their online account. Please note that access is provided once we have received signed copies of the User Declaration.

This guide will support you through the use of the system to complete the different available functions but if you have any questions or if you spot an error in the data that has been input please contact the Customer Service team who will be happy to support.

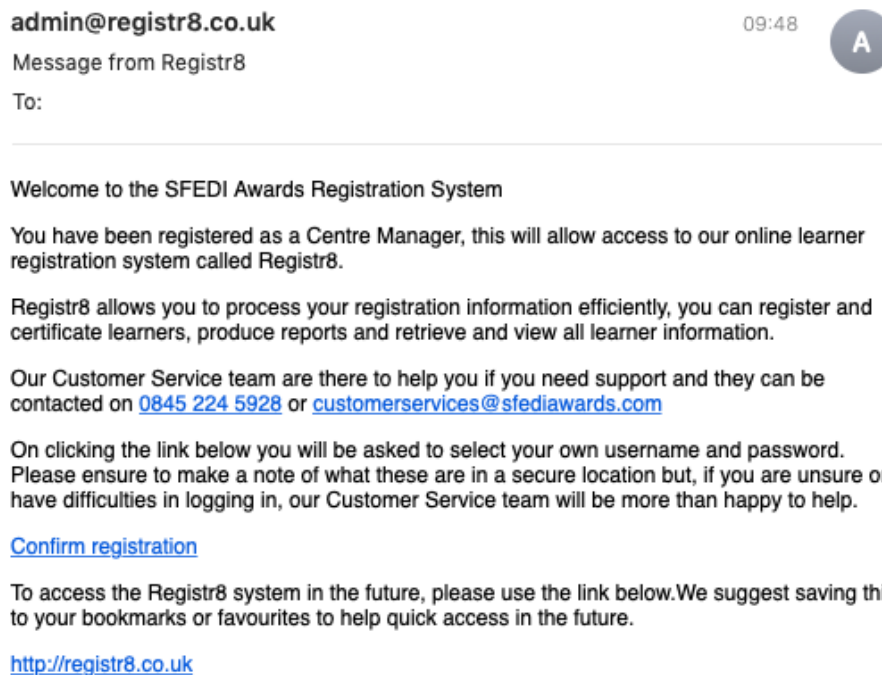
If you do spot any errors in the data submitted to the Registr8 system it is important that you contact us straight away as we can often rectify them for you but, if left too late, there may be a charge made to cover both administration and other costs incurred.

# Initial Steps

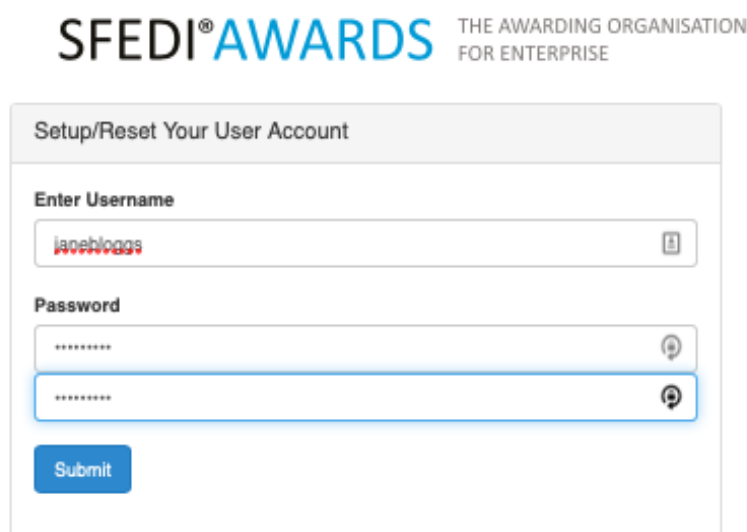
## Setting Up Your Account

Setting up your Registr8 account is simple once you have requested an account and returned your signed Registr8 User Declaration.

You will receive an automatic welcome email from the Registr8 system



Simply click on the Confirm Registration option which will open up a webpage for you.

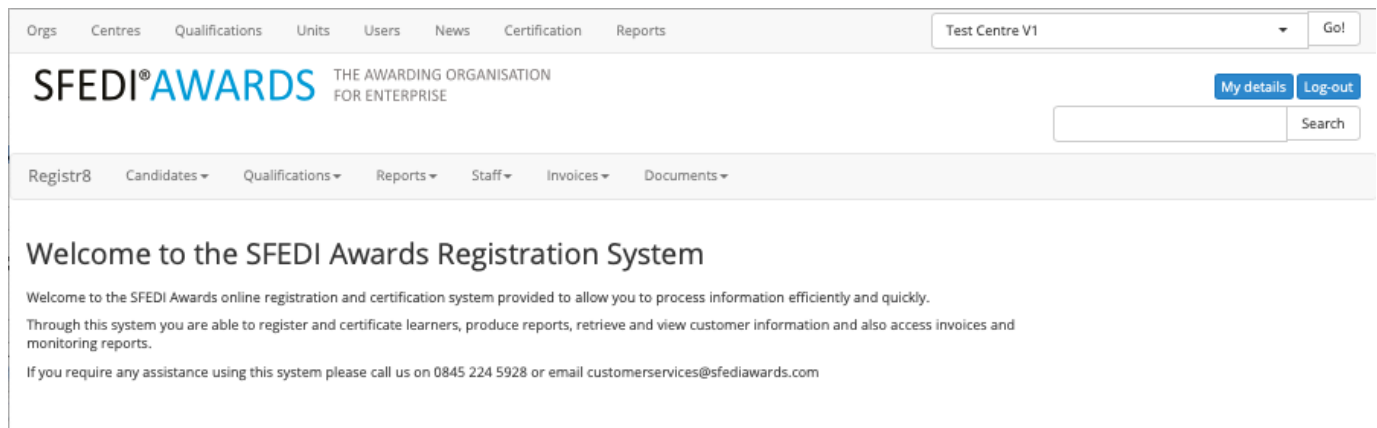


You are able to select your own username and password to allow you continued access to the system.

Please ensure you choose something memorable and keep it secure so that only you have access to your account.

As a suggestion to create a secure password you should use a password that is at least eight characters long and uses a combination of numbers, symbols, and letters.

Once you click on submit you will then be presented with the landing page.



This landing page is how you will navigate to the different sections of the Registr8 system to complete all of the tasks you require.

Please note that the setup link will only work on this occasion and in future you should use <http://www.registr8.co.uk> to login to the system.

## Adding Additional Accounts

To add additional accounts to the Registr8 system complete the Centre Update form available on the SFEDI Awards website at <http://sfediawards.com/centre-update/>.

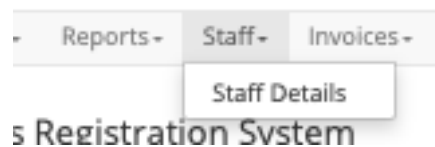
Once you have navigated to the form select Access to Registr8 from the drop down menu.

Complete and submit the online form and, on approval, the member of staff will receive the welcome email allowing them to set up their account following the steps above.

# Centre Information

## Approved Staff Members List

To see the members of staff who have been approved to be involved in the delivery and certification of SFEDI Awards qualifications click the dropdown menu 'Staff' and click on 'Staff Details'



The following page will show you the staff members, their approved roles, the qualifications they are approved to deliver and whether they have access to the Registr8 system

### Staff Details

| Name          | Roles                            | Approved to deliver   | System access ? |
|---------------|----------------------------------|---|-----------------|
| Phil Smith    | Registration and Certification   |   | Yes             |
| Helen Long    | IQA                              | Level 1 Certificate in Sales and Marketing<br>Level 1 Award in Passport to Enterprise and Employment<br>Level 1 Award in Enterprising Skills and Employability<br>Level 6 Diploma In Supply Chain and Operations Strategy | Yes             |
| Bob Kane      | Assessor/Tutor                   | Level 1 Certificate in Sales and Marketing<br>Level 1 Award in Passport to Enterprise and Employment<br>Level 1 Award in Enterprising Skills and Employability  | No              |
| Samantha Belk | Assessor/Tutor                   | Level 1 Certificate in Sales and Marketing  | No              |
| Joseph Ward   | Main Point of Contact<br>Manager |   | Yes             |

Only staff members listed on this page are approved to be involved in the delivery and certification of SFEDI Awards qualifications.

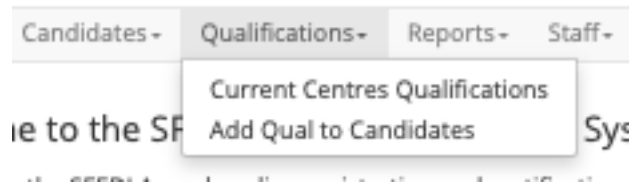
To add or remove members of staff complete the Centre Update form available on the SFEDI Awards website at <http://sfediawards.com/centre-update/>.

Once you have navigated to the form select either 'Addition of Staff Member' or 'Removal of Staff Member' from the drop down menu.

Complete and submit the online form and, on approval, the member of staff will either be added to the list or removed from the list dependent on the type of request received.

## Seeing Your Approved Qualifications

To see a list of the qualifications that your organisation is currently approved to deliver click the dropdown menu 'Qualifications' and click on 'Current Centres Qualifications'



The following page will show you the qualifications that your organisation is currently approved to deliver, the unique reference number for each and whether you currently hold Direct Claims Status or not for each of the qualifications listed.

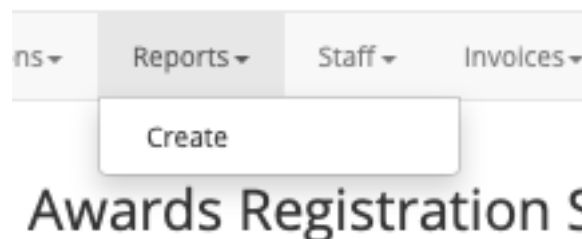
### Your Approved Qualifications

| Title   | Qual Code  | Direct Claim? |
|---|------------|---------------|
| Level 1 Certificate in Sales and Marketing              | 601/8633/0 | No            |
| Level 1 Award in Passport to Enterprise and Employment  | 603/0633/6 | No            |
| Level 1 Award in Enterprising Skills and Employability  | 600/5462/1 | No            |
| Level 6 Diploma In Supply Chain and Operations Strategy | 601/8799/2 | No            |

## Accessing and Downloading Reports

There are occasions where you may wish to generate a report so you can see the data that has been entered into the Registr8 system.

To generate a report click the dropdown menu 'Reports' and click on 'Create'



This will display a page allowing you to create the type of report you wish using multiple selection criteria



To generate a report select the qualification you wish to generate a report for, this also includes the option for 'All'.

Then select one of the options from Registered (All), Registered (Not Completed), Completed, Completed (Pending Review), Completed (Under Review), Completed (Certificated), Certificate Withdrawn.

These options will show you the following results:

|                            |  |
|----------------------------|--|
| Registered (All)           | All registered for a qualification whether still on programme or certification claimed   |
| Registered (Not Completed) | All registered for a qualification who are still on programme  |
| Completed                  | All who a certification claim has been made  |
| Completed (Pending Review) | All who a certification claim has been made but is not yet subject to monitoring activities by SFEDI Awards. Please note this is only valid for qualifications where a centre does not hold Direct Claims Status   |
| Completed (Under Review)   | All who a certification claim has been made and is currently subject to monitoring activities by SFEDI Awards. Please note this is only valid for qualifications where a centre does not hold Direct Claims Status |
| Completed (Certificated)   | All who certification has been approved and processed  |
| Certificate Withdrawn      | All who have been withdrawn from the qualification   |

Once you have selected the type of report you wish to generate you can select time frames by either selecting a date range using the calendar or a timeframe using the dropdown menu. To generate the report click the 'Preview Data' button.

**Select Option**

**Qualification:** Level 1 Award in Passport to Enterprise and Employment

Registered (All)  
 Registered (Not Completed)  
 Completed  
 Completed (Pending Review)  
 Completed (Under Review)  
 Completed (Certificated)  
 Certificate Withdrawn

**Between:** 2018-03-01

**And:** 2018-11-08

**OR**

**For period:** The last year

Preview Data

**2 Records Returned**

| Organisation   | Name        | Qualification  | Registration Date | Certification Date |
|----------------|-------------|--|-------------------|--------------------|
| Test Centre V1 | Joe Bloggs  | Level 1 Award In Passport to Enterprise and Employment | 2018-10-30        |                    |
| Test Centre V1 | Jane Bloggs | Level 1 Award In Passport to Enterprise and Employment | 2018-11-07        |                    |

Export Data to Excel

Results will be displayed with the name of the centre, candidate name, qualification name, registration date and certification date if applicable.

This preview will display up to 50 results and, to either see all returned data or to be able to filter data, you are able to download the results in spreadsheet format by clicking the 'Export Data to Excel' button.

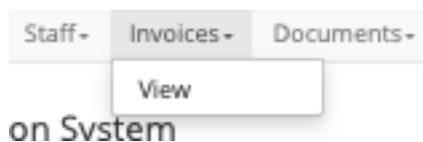
## Accessing and Downloading Invoices

As part of the invoicing system, centres are required to download their invoice from the Registr8 system for payment within the 30-day payment terms.

An email is sent to the person identified as having responsibility for finance to notify them that the invoice is ready for download. The invoice can either be downloaded by this person or a different person if the finance contact does not have system access.

Please note that due to data protection requirements we are not able to email copies of invoices and these should be downloaded using these instructions. Payment is due from the date of the generation of the invoice, not the date at which it was downloaded.

To access the invoices on the system click the dropdown menu 'Invoices' and click on 'View'



The following page will show you the invoices that have been raised due to registrations made using the Registr8 system. To download the invoice click the 'Download' button next to the corresponding invoice.

### Invoices

| Invoice Number | Date Raised |                          |
|----------------|-------------|--------------------------|
| 1004193        | 31-10-2018  | <a href="#">download</a> |

This will download a PDF of the invoice for your records and for payment.

If you have questions regarding the invoices raised you should speak to a member of the SFEDI Awards Finance team on [finance@sfedwards.com](mailto:finance@sfedwards.com).

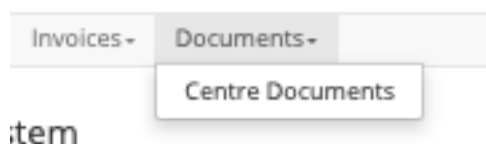
## Accessing Centre Documentation

As part of our communication between SFEDI Awards and our centre network we distribute agendas and sampling lists for monitoring activities, reports following monitoring activities and requests for information.

An email is sent to the person identified as the main point of contact whenever there is a new document ready for download from this section of Registr8.

Please note that due to data protection requirements we are not able to email these forms of information, they should be downloaded using these instructions.

To access the centre documentation click the dropdown menu 'Documents' and click on 'Centre Documents'

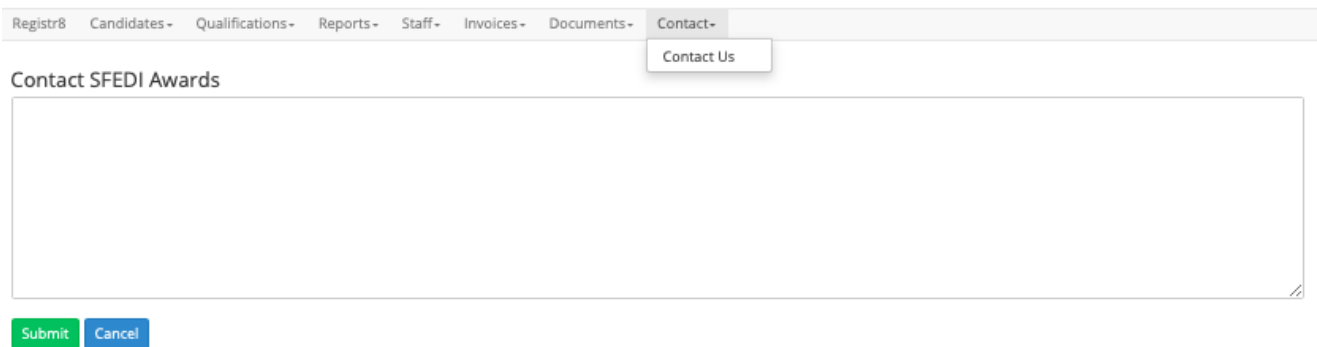




## Contacting SFEDI Awards

There are many ways in which you can contact the team at SFEDI Awards; through email on [customerservices@sfediawards.com](mailto:customerservices@sfediawards.com), by telephone on 0845 224 5928 or through the contact us page at <http://sfediawards.com/contact-us-2/>

You can also contact us using the Registr8 system by clicking on the menu option 'Contact Us' and completing the free text box and clicking the 'Submit' button.

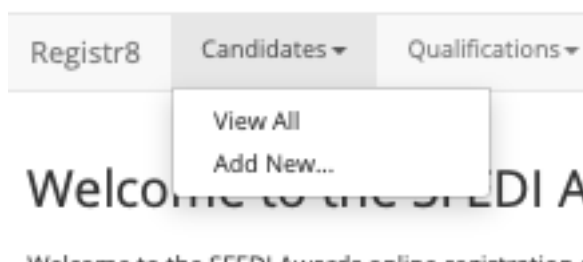


The screenshot shows a web interface for the Registr8 system. At the top, there is a horizontal menu with the following items: Registr8, Candidates -, Qualifications -, Reports -, Staff -, Invoices -, Documents -, and Contact -. The 'Contact -' item is highlighted, and a dropdown menu is visible below it containing the option 'Contact Us'. Below the menu, the page title is 'Contact SFEDI Awards'. Underneath the title is a large, empty rectangular text input box. At the bottom left of the page, there are two buttons: a green 'Submit' button and a blue 'Cancel' button.

# Candidate Functions

## Individually Registering a New Candidate

To register an individual candidate with a qualification click the dropdown menu 'Candidate' and click on 'Add New...'



This will open the registration page where you can enter the information required.

### Add Candidate

ULN

Title

Firstname

Surname

Make sure the candidates name has the correct spelling and AVOID entering the candidates name in upper-case.

Address

City

County

Country

Postcode

Please note that the information entered on this form will impact the qualification the candidate is registered for and also the information that is eventually displayed on their certificate so accuracy is important.

If your organisation makes use of public funding to support the delivery of the qualification(s) you are required to enter the Unique Learning Number (ULN) of each learner at the time of registration so that, when the time comes, we are able to upload achievement data to the Personal Learning Record (PLR).

ULNs are not supplied by SFEDI Awards and should be applied for through the Learner Records Service (LRS).

Please note that if you are not using public funding to support the delivery of the qualification(s) you are not required to enter a ULN into the system and this field should be left blank.

To support both the candidates who wish to undertake our qualifications and the accuracy of the data we hold, our Registr8 system supports none binary gender recognition.

If a candidate wishes to declare a none binary gender within their registration record click under 'Title' and 'Gender' select 'Other Gender' and a free text box will be displayed that will allow you to enter the description the candidate wishes to use.

**Title**

Other title  Specify other

**Gender**

Other gender  Specify other

Please note that 'Title' and 'Gender' are optional fields and so no declaration is required if this is the preferred option.

At the bottom of the registration form you will be required to select the qualification you wish to register the learner against from the drop down menu. If the qualification you wish to register the learner for is not displayed it may mean that your organisation is not currently approved for delivery.

Please speak to a member of the Customer Service team for clarification if this is the case.

If your organisation has informed us that a Purchase Order (PO) number must be entered against each learner then you will also be presented with a field requiring you to enter the PO number for the candidate.

If your organisation has not informed us that a PO number is required then this field will not appear.

**Qualification/Unit**

Select A Qualification

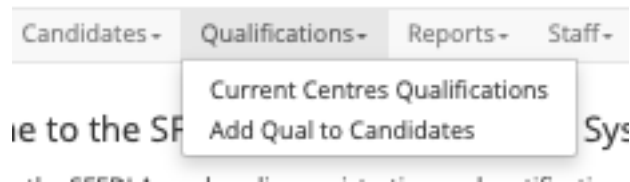
By submitting I agree the information within this registration form is accurate and I have made the learner aware of how this information is being used including their rights under GDPR including the right for erasure and the legal exemptions that apply to this and have signed permission to provide it

**Purchase Order Ref**

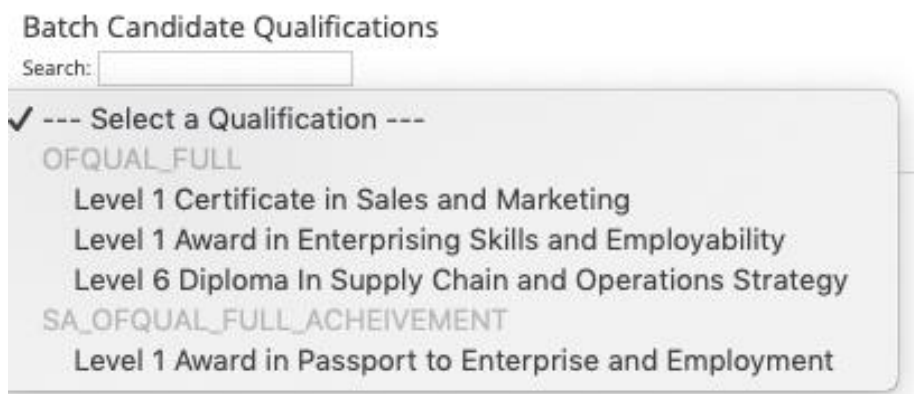
Once you have completed all of the fields click the 'Add' button and the candidate will be registered on the system.

## Bulk Registering Existing Candidates

To bulk register existing candidates on a qualification click the dropdown menu 'Qualifications' and click on 'Add Qual to Candidates'



Click on the drop down menu to display the qualifications that you are able to register candidates for



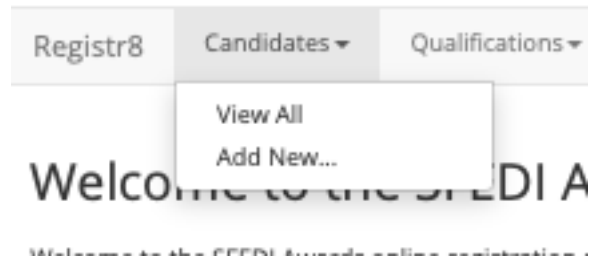
Selecting the qualification you wish to register candidates for will display all candidates that are available for registration. Place a tick next to each candidate you wish to register and click the button 'Add Qualification to Candidates'.



## Individually Registering an Existing Candidate






To register an existing individual candidate with a qualification click the dropdown menu 'Candidate' and click on 'View All'



This will display a list of the candidates registered with your centre. You can either search by first, last names or both or sort the list by 'Candidate Name' or 'Registration Date' using the drop down menu.

### Candidate Administration

| <input type="text"/>  | <input type="button" value="Search"/> | Sort By Candidate Name ▾ |
|---|---------------------------------------|--------------------------|
|  Candidate Name              | Date Registered                       | Centre                   |
|  <a href="#">Jane Bloggs</a> | 2018-11-07                            | Test Centre V1           |
|  <a href="#">Joe Bloggs</a>  | 2018-10-30                            | Test Centre V1           |

To access a candidate's record click on their name

You will be displayed with the candidates record on the system displaying three tabs, an overview of the information entered, details of the courses the candidate has been registered for and a third for the uploading of documents, eg. the submission of electronic folders for sampling.

## Candidate Administration

Info Edit Candidate Courses Documents

### Jane Bloggs

SFEDI ID: SFE100E4VUHA6GAU

None Jane Bloggs

123 Stanfield Street

Birmingham

West Midlands

England

B6 5UL

DOB: 02-08-2001

Female

Not Stated

Disability: No

T: 01920 000 0000

E:

By clicking on the 'Edit Candidate Courses' tab you will see the details of the courses that the candidate has been registered for.

To register a new course for the candidate click on the drop down menu at the top of the screen and select the qualification you wish to add. If your centre requires the use of PO numbers then enter this in the corresponding field and click the 'Add Qualification button'.

## Candidate Administration

Info Edit Candidate Courses Documents

Level 1 Certificate in Sales and Marketing - PO Number Add Qualification

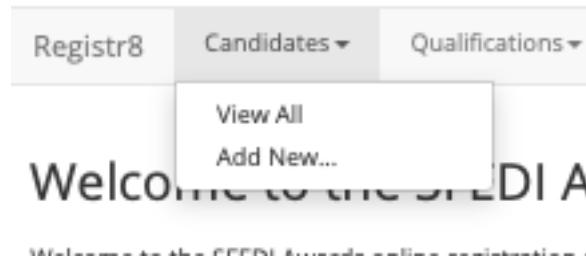
OFQUAL\_FULL  
Level 1 Award in Enterprising Skills and Employability  
Level 1 Certificate in Sales and Marketing  
Level 6 Diploma In Supply Chain and Operations Strategy

UNIT NAME ID

This will now display an additional qualification on the 'Edit Candidate Courses' tab corresponding to those the candidate was already registered for and the new one added.




## Viewing Candidate Records

To access the record of a candidate click the dropdown menu 'Candidate' and click on 'View All'



This will display a list of the candidates registered with your centre. You can either search by first, last names or both or sort the list by 'Candidate Name' or 'Registration Date' using the drop down menu.

### Candidate Administration

|  Candidate Name              | Date Registered | Centre         |
|---|-----------------|----------------|
|  <a href="#">Jane Bloggs</a> | 2018-11-07      | Test Centre V1 |
|  <a href="#">Joe Bloggs</a>  | 2018-10-30      | Test Centre V1 |

To access a candidate's record click on their name

You will be displayed with the candidates record on the system displaying three tabs, an overview of the information entered, details of the courses the candidate has been registered for and a third for the uploading of documents, eg. the submission of electronic folders for sampling.

## Candidate Administration

Info Edit Candidate Courses Documents

### Jane Bloggs

SFEDI ID: SFE100E4VUHA6GAU

None Jane Bloggs

123 Stanfield Street

Birmingham

West Midlands

England

B6 5UL

DOB: 02-08-2001

Female

Not Stated

Disability: No

T: 01920 000 0000

E:

**It is important that if you spot an error in the information contained within the candidate's record then you must contact the SFEDI Awards team immediately as once certifications have been issued this cannot be updated and may carry additional charges.**

By clicking on the 'Edit Candidate Courses' tab you will see the details of the courses that the candidate has been registered for.

This is also where you would complete or withdraw existing courses/units or register additional courses. Further details on this can be found later in this guide.

Info Edit Candidate Courses Documents

Level 1 Certificate in Sales and Marketing - PO Number Add Qualification

**Qualification: Level 1 Award in Passport to Enterprise and Employment**

Learners must achieve the mandatory unit listed below

**Mandatory**

| Unit Name                                     | ID         | Credit | Level | Date Registered | Completed | Date Completed |
|---|------------|--------|-------|-----------------|-----------|----------------|
| <b>M</b> Developing an Enterprising Character | F/615/2244 | 3      | 1     | 07-11-2018      | No        |                |

Learners must achieve a minimum of 4 credits from any of the units from the three groupings below

**Personal and Social Development**

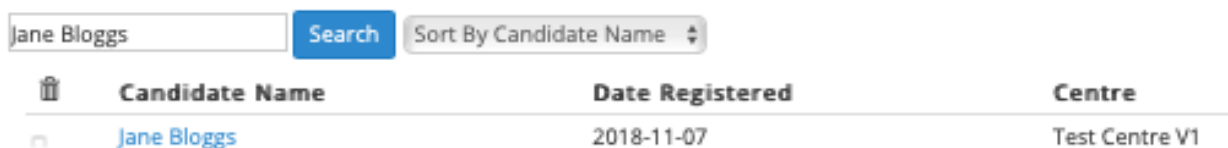
| Unit Name                                     | ID         | Credit | Level | Date Registered | Completed | Date Completed |
|---|------------|--------|-------|-----------------|-----------|----------------|
| <b>O</b> Self-Awareness and Self-Belief       | J/615/2245 | 2      | 1     | 07-11-2018      | No        |                |
| <b>O</b> Resilience and Grit                  | L/615/2246 | 1      | 1     | 07-11-2018      | No        |                |
| <b>O</b> Personal Presentation and its Impact | D/615/2249 | 2      | 1     | 07-11-2018      | No        |                |



You can also search for candidates by using the search box at the top right hand side of the webpage, this is displayed regardless of what page you are currently viewing.



This will display the candidate allowing you to click on their name to display their record.

### Candidate Administration



|  | Candidate Name | Date Registered | Centre         |
|---|----------------|-----------------|----------------|
|  | Jane Bloggs    | 2018-11-07      | Test Centre V1 |

Please note you can also search using the unique SFEDI ID number allocated to each candidate when they are first registered

## Withdrawing Candidates

There may be occasions in which a candidate may no longer be working towards their qualification as they are either having a break in their learning or have left the programme indefinitely.

In these instances you should withdraw the candidate from their qualification but remember that they have up to 2 years to complete their qualification from the point of registration and so if the candidate returns at a later date you can reinstate their registration by contacting the SFEDI Awards Customer Service team.

To withdraw a candidate from a qualification navigate to their candidate record following the earlier steps and click on the 'Edit Candidate Courses' tab.

Find the qualification you wish to withdraw on the page by scrolling down or up. Please note that if the candidate is registered for multiple qualifications they will all be listed on this page so please ensure you locate the correct qualification.

Underneath the qualification you wish to withdraw, after the final unit listing, you should press the 'Withdraw' button.

| Qualification: Level 1 Certificate in Sales and Marketing |            |        |       |                 |           |      |
|---|------------|--------|-------|-----------------|-----------|------|
| Unit Name   | ID         | Credit | Level | Date Registered | Completed | Date |
| <b>M</b> Communication skills in sales                    | L/508/3094 | 1      | 1     | 07-11-2018      | No        |      |
| <b>O</b> Coping With Change                               | M/508/3153 | 1      | 1     | 07-11-2018      | No        |      |
| <b>O</b> Creative Thinking                                | H/508/3151 | 1      | 1     | 07-11-2018      | No        |      |
| <b>M</b> Developing Customer Service Skills               | T/508/3090 | 3      | 1     | 07-11-2018      | No        |      |
| <b>M</b> How to Keep Improving                            | D/508/3097 | 1      | 1     | 07-11-2018      | No        |      |
| <b>M</b> Make successful deals in business                | F/508/3089 | 1      | 1     | 07-11-2018      | No        |      |
| <b>O</b> Managing Your Time                               | T/508/3154 | 25     | 1     | 07-11-2018      | No        |      |
| <b>M</b> Market Business                                  | A/508/3088 | 1      | 1     | 07-11-2018      | No        |      |
| <b>M</b> Selling Lawfully and Ethically                   | K/508/3099 | 1      | 1     | 07-11-2018      | No        |      |
| <b>O</b> Understanding Conflict at Work                   | K/508/3152 | 1      | 1     | 07-11-2018      | No        |      |
| <b>M</b> Understanding Consumer Buying Behaviour          | J/508/3093 | 1      | 1     | 07-11-2018      | No        |      |
| <b>M</b> Understanding Marketing                          | R/508/3095 | 2      | 1     | 07-11-2018      | No        |      |
| <b>O</b> Understanding Motivation                         | A/508/3155 | 1      | 1     | 07-11-2018      | No        |      |
| <b>M</b> Understanding the Sales Cycle                    | Y/508/3096 | 3      | 1     | 07-11-2018      | No        |      |

Minimum optional units to complete: 1

Claim Unit Certification

Purchase Order Ref.

Once you click the 'Withdraw' button the candidate's registration record will be updated to show that qualification as withdrawn and the date it was actioned

Qualification: Level 1 Certificate in Sales and Marketing

Course Withdrawn on 07-11-2018

**If you wish to reactivate this registration, as long as it remains within the 2 years completion timeframe from the point of registration, contact a member of the SFEDI Awards Customer Service team who will action this for you.**

# Claim Certification for Individual Candidates

To claim certification for an individual candidate navigate to their candidate record following the earlier steps and click on the 'Edit Candidate Courses' tab.

Find the qualification you wish to claim certification for on the page by scrolling down or up. Please note that if the candidate is registered for multiple qualifications they will all be listed on this page so please ensure you locate the correct qualification.

For the qualification you wish to claim certification for you will see the units either listed within one or multiple sections dependent on whether there are multiple groups you can select from.

At the top of each section you will see the requirements for how many or what combination of units must be completed.

| Qualification: Level 1 Award in Passport to Enterprise and Employment                             |            |        |       |                 |           |                |
|---|------------|--------|-------|-----------------|-----------|----------------|
| Learners must achieve the mandatory unit listed below   |            |        |       |                 |           |                |
| <b>Mandatory</b>  |            |        |       |                 |           |                |
| Unit Name   | ID         | Credit | Level | Date Registered | Completed | Date Completed |
| <span style="color: red;">■</span> Developing an Enterprising Character                           | F/615/2244 | 3      | 1     | 07-11-2018      | No ▾      |                |
| Learners must achieve a minimum of 4 credits from any of the units from the three groupings below |            |        |       |                 |           |                |
| <b>Personal and Social Development</b>  |            |        |       |                 |           |                |
| Unit Name   | ID         | Credit | Level | Date Registered | Completed | Date Completed |
| <span style="color: green;">■</span> Self-Awareness and Self-Belief                               | J/615/2245 | 2      | 1     | 07-11-2018      | No ▾      |                |
| <span style="color: green;">■</span> Resilience and Grit  | L/615/2246 | 1      | 1     | 07-11-2018      | No ▾      |                |
| <span style="color: green;">■</span> Personal Presentation and its Impact                         | D/615/2249 | 2      | 1     | 07-11-2018      | No ▾      |                |
| <span style="color: green;">■</span> Communication Skills   | Y/615/2251 | 2      | 1     | 07-11-2018      | No ▾      |                |
| <span style="color: green;">■</span> Assertiveness  | H/615/2253 | 1      | 1     | 07-11-2018      | No ▾      |                |

If a unit has a red square alongside this is a mandatory unit, if the square is green, this indicates the unit is optional.

To select the units you wish to complete select 'Yes' from the drop down menus in the 'Completed' column and, once selected, a date will be entered automatically into the 'Date Completed' column.

| Completed | Date Completed |
|-----------|----------------|
| Yes ▾     | 07-11-2018     |

Once you have selected the units you wish to complete scroll to the end of the qualification where you will see the options to 'Claim Unit Certification' or 'Claim Qualification Certificate'.

You are able to claim both types of certificate depending on whether the candidate completed the required number of units in the combination needed prior to leaving their programme of learning.

If you are wanting to claim a certificate for the full qualification but this option is not displayed, this will either be you have not selected sufficient units and so please review those selected.

Alternatively the learner has not completed the correct combination of units in which case they have not met the requirements of the qualification.

When you are ready to claim the certification, whether it be for units or the qualification, select 'Yes' from the dropdown menu.

Claim Qualification Certificate? **Yes** **Completed On: 07-11-2018**

**Withdraw**

Certificate: Pending Review

If you do not hold Direct Claims Status for the qualification you will see the message 'Certificate: Pending Review' and you should contact the SFEDI Awards team to organise for a monitoring activity to take place.

If you do hold Direct Claims Status for the qualification you will see the message 'Certificate: Pending' and, in this instance, there is no further action required as the certificate will be dispatched to you automatically through the post for distribution to your candidate.

When the certificate has been produced, this message will change to 'Certificate: Certificated'

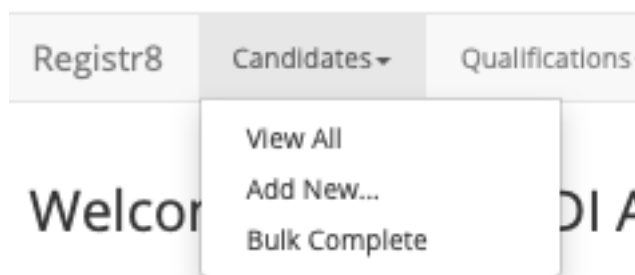
## Claim Certification for Multiple Candidates

There are occasions where candidates complete the same qualification and the same units within that qualification or even, where candidates only work towards units of a qualification, they all complete the same.

To support efficiency in claiming certification in these circumstances you are able to claim certification for multiple candidates at once using the Registr8 system.

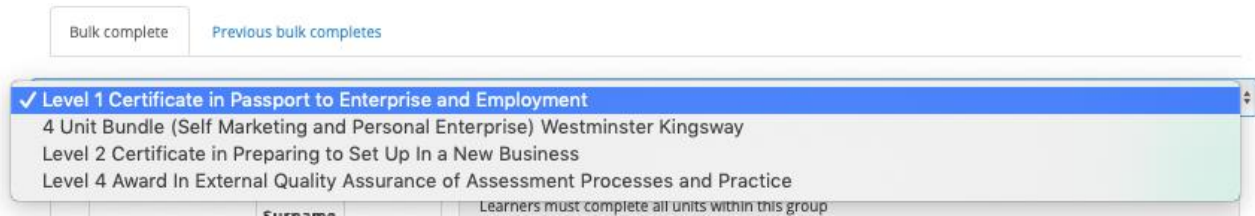
If you would prefer to claim certificates for individuals using this system rather than navigating to the individual candidate's registration record you can also use this system.

To claim certification for multiple candidates click the dropdown menu 'Candidates' and click on 'Bulk Complete'.





Select the qualification you wish to claim certification for from the dropdown menu



This will display all of the live candidates who are registered for the qualification selected. You are able to order the candidates in alphabetical order by clicking on the arrows within the 'Surname' column heading.

search candidates

| <input type="checkbox"/> | <b>Id</b>        | <b>Surname</b><br>↕ | <b>Firstname</b> |
|--------------------------|------------------|---------------------|------------------|
| <input type="checkbox"/> | SFE1O0E52QM6PPA0 | Bloggs              | Jane             |
| <input type="checkbox"/> | SFE1NUKPQ8S6UQO0 | Bloggs              | Joe              |

Select the candidates you wish to claim certification for by clicking the tick box next to each candidate's name. You can also select all by clicking the tick box at the top of the column

search candidates

| <input type="checkbox"/>            | <b>Id</b>        | <b>Surname</b><br>↕ | <b>Firstname</b> |
|-------------------------------------|------------------|---------------------|------------------|
| <input checked="" type="checkbox"/> | SFE1O0E52QM6PPA0 | Bloggs              | Jane             |
| <input type="checkbox"/>            | SFE1NUKPQ8S6UQO0 | Bloggs              | Joe              |

You can choose whether to claim for a qualification or to claim for unit certification. The default setting is that you will need to select sufficient units within the correct combination to meet the structure of the qualification.

If you wish to override this function then you will need to set 'Complete as Unit Certificate?' to 'Yes'

Bulk Complete

Complete as Unit Certificate?

Yes

Unit certificate, no criteria needed

|                          |   | <b>Id</b>  | <b>Title</b>                         |
|--------------------------|---|------------|--------------------------------------|
| <input type="checkbox"/> | - | F/615/2244 | Developing an Enterprising Character |

You will notice that the unit section heading(s) now change to an orange colour with the wording 'Unit certificate, no criteria needed'. This will allow you to now claim unit certification but not for a full qualification.

To claim unit(s) regardless of whether you wish to claim qualification or unit certification click the tick boxes next to all of the corresponding units you wish to claim.

Where you are claiming qualification certification you will need to meet the structure requirements indicated by the wording at each unit section heading(s)

Learners must complete all units within this group

|                          |   | <b>Id</b>  | <b>Title</b>                         |
|--------------------------|---|------------|--------------------------------------|
| <input type="checkbox"/> | M | F/615/2244 | Developing an Enterprising Character |

Learners must achieve a minimum of 10 credits from any of the units from the three groupings below

Minimum Score: 10

When you have selected sufficient unit(s) within the correct combination to meet the structure requirements of the qualification the unit section heading(s) will turn green and the 'Bulk Complete' button will no longer be greyed out.

**Bulk Complete** Complete as Unit Certificate?  No

**Learners must complete all units within this group**

|                                     |          | <b>Id</b>  | <b>Title</b>                         |
|-------------------------------------|----------|------------|--------------------------------------|
| <input checked="" type="checkbox"/> | <b>M</b> | F/615/2244 | Developing an Enterprising Character |

**Learners must achieve a minimum of 10 credits from any of the units from the three groupings below**

Minimum Score: 10

|                                     |          | <b>Id</b>  | <b>Title</b>                   | <b>Credit</b> |
|-------------------------------------|----------|------------|--------------------------------|---------------|
| <input checked="" type="checkbox"/> | <b>M</b> | F/615/2244 | Self-Awareness and Self-Belief | 3             |

When you are ready, click the 'Bulk Complete' button to process your claim. This will display a pop up window asking you to confirm the accuracy of your claim.

Level 1 Certificate in Passport to Enterprise and Employment ×

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Units to complete:

- Developing an Enterprising Character
- Self-Awareness and Self-Belief
- Personal Presentation and its Impact
- Assertiveness
- Emotional Intelligence and Anger Management
- Creative Thinking
- How to Keep Improving
- Civility and Etiquette

Candidates to complete

- Bloggs, Jane

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**Confirm bulk completion** ⚙️

If you are happy that the claim is correct then click the 'Confirm Bulk Completion' button. If you would like to make a change click the 'x' in the top right hand corner and repeat the earlier steps.

If you would like to see a record of the previous bulk completion claims made click on the 'Previous Bulk Completes' tab

[Bulk complete](#)

Previous bulk completes

| User | Qualification  | Number processed | Date                 |                          |
|------|--|------------------|----------------------|--------------------------|
|      | Level 1 Certificate in Passport to Enterprise and Employment | 1                | 08/11/2018, 09:53:39 | <a href="#">download</a> |

This will display a table showing the user account that completed the claim, the qualification they claimed for, the number of claims processed and the date and time it was completed.

You can download a PDF report with these details for your records by clicking the 'Download' button

## Any Other Questions?

If you have any other questions or would like to discuss other opportunities that may be available feel free to speak with a member of the Customer Service team who will be happy to support you.

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