Managing your team and checking your teams compliance

As a manager on the LEaD training website, you can check your team and their team's compliance for statutory and mandatory topics.

You will only be able to book and attend a 'Non Statutory & Mandatory' training course if you are 100% compliant for your Statutory & Mandatory training (all your Red buttons have turned Green) and managers should only authorise non-statutory and mandatory training requests if their team is 100% compliant.

If the staff member is not compliant and has not got a booking for that topic, then you as the manager must risk-assess the training need.

If the training is agreed, the booking can be continued and you will receive a reminder before the booking is approved.

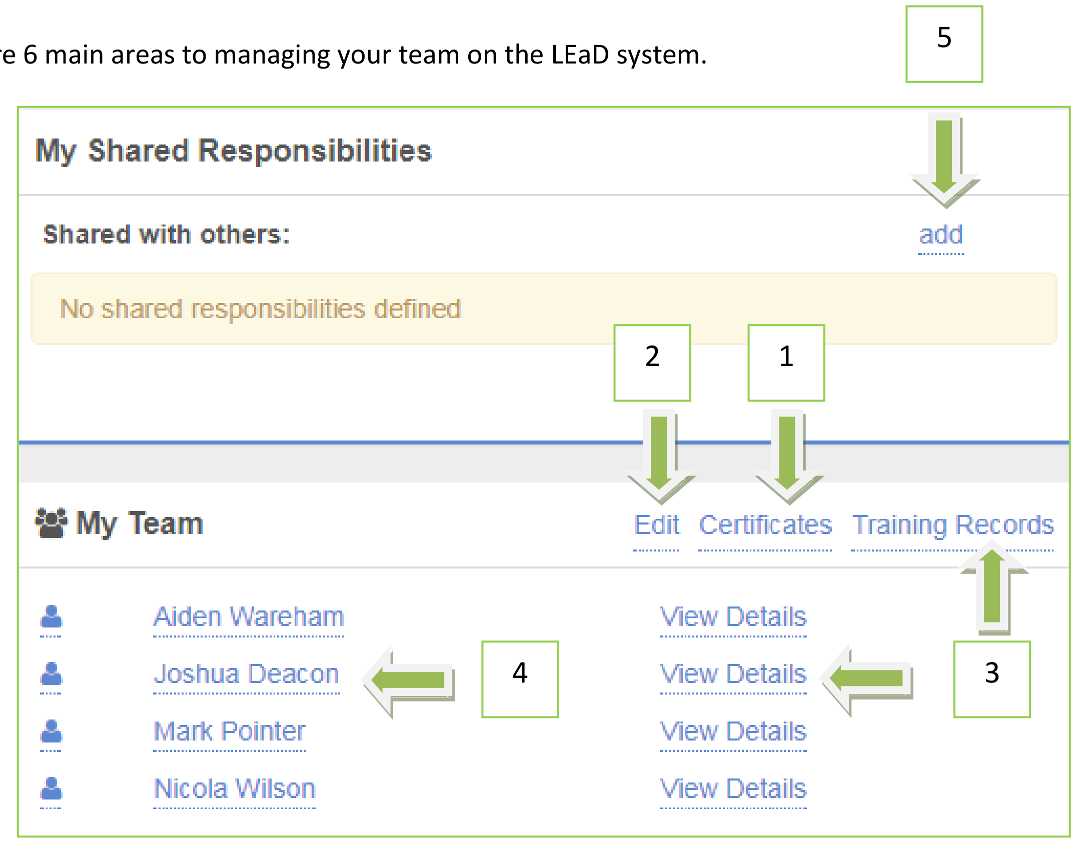
Checking your immediate team

You can check your immediate team by logging into your LEaD training account.

At the bottom of your homepage you will have a 'My Team' section

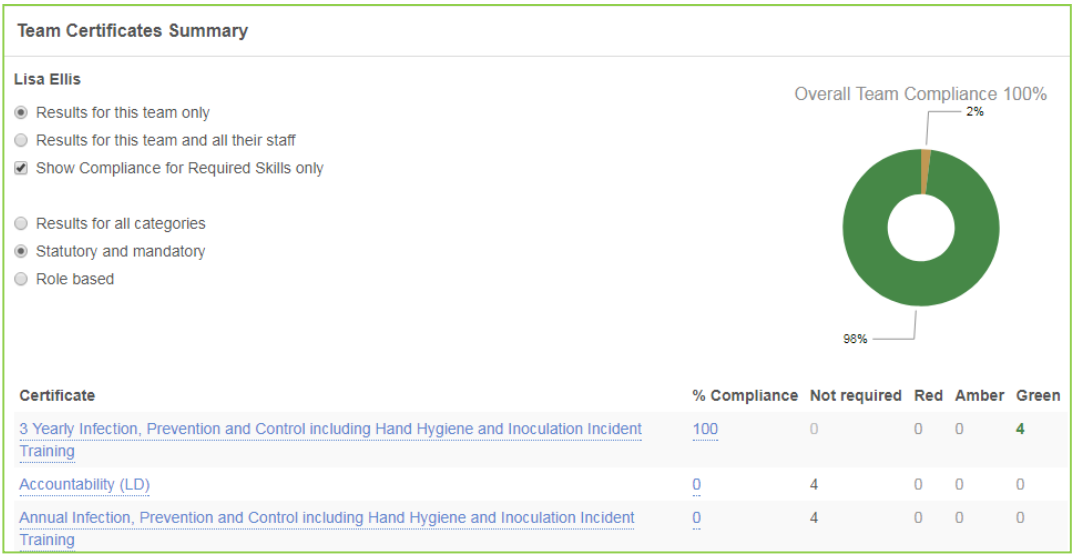
Quick guide to your team

There are 6 main areas to managing your team on the LEaD system.



Telephone: 023 8087 4091 **email:** lead@southernhealth.nhs.uk

1. View my team's certificates



Team Certificates Summary

Lisa Ellis

- Results for this team only
- Results for this team and all their staff
- Show Compliance for Required Skills only

- Results for all categories
- Statutory and mandatory
- Role based

Certificate	% Compliance	Not required	Red	Amber	Green
3 Yearly Infection, Prevention and Control including Hand Hygiene and Inoculation Incident Training	100	0	0	0	4
Accountability (LD)	0	4	0	0	0
Annual Infection, Prevention and Control including Hand Hygiene and Inoculation Incident Training	0	4	0	0	0

View all of your team's statutory and mandatory compliance by topic

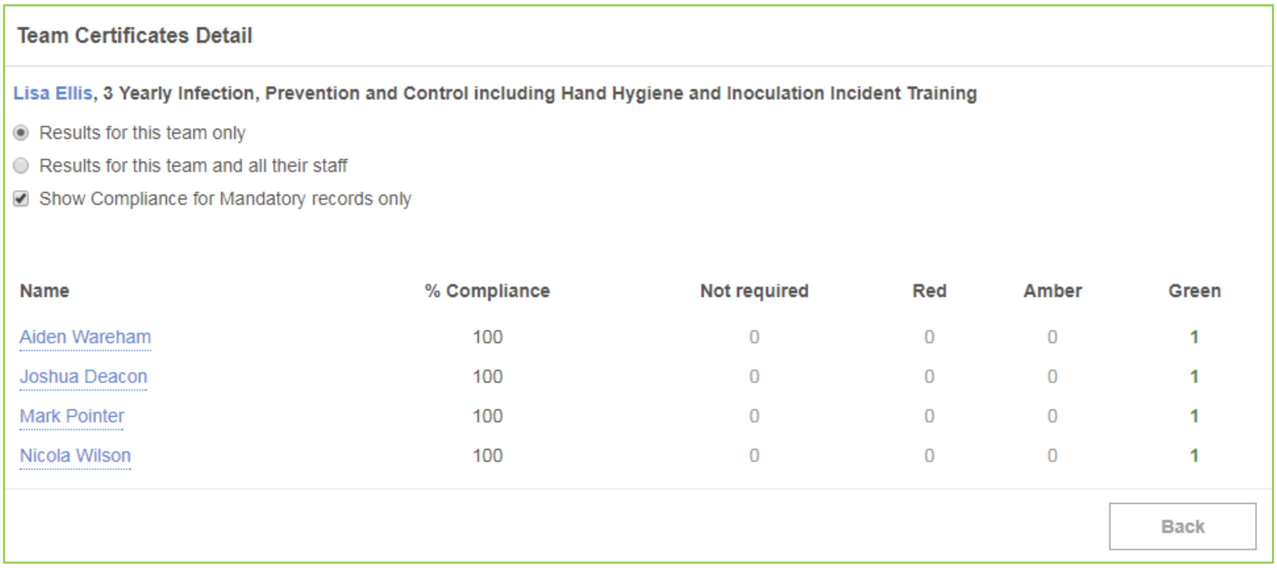
'Show compliance for mandatory records only' will show only the skills that are required for each staff member. (It is recommended to keep this ticked)

Selecting 'Results for this team only' will show your immediate team only whereas 'Results for this team and al their staff' will show your team and any staff that are line managed by someone in your team.

The overall team compliance is shown on the right hand side of the page.

To break down your compliance, select the compliance number which takes you into the compliance for that topic and will list your team members.

Selecting the compliance number next to the topic will show you the breakdown of compliance for each member of your team for that particular topic.



Team Certificates Detail

Lisa Ellis, 3 Yearly Infection, Prevention and Control including Hand Hygiene and Inoculation Incident Training

- Results for this team only
- Results for this team and all their staff
- Show Compliance for Mandatory records only

Name	% Compliance	Not required	Red	Amber	Green
Aiden Wareham	100	0	0	0	1
Joshua Deacon	100	0	0	0	1
Mark Pointer	100	0	0	0	1
Nicola Wilson	100	0	0	0	1

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2. Adding and removing team members

In the edit group page, you can add or remove people from your team.

To add a team member click the add button and search for them using the user search page. (Assignment number will help narrow your search down).

Once you have found your team member, click on their name and then save.

To remove a team member, select their name on the edit group page and then click remove.

Remember to click save to save your changes.

3. View a team members training record

To view a team members training record, you can either select the ‘Training Records’ button to view all staffs record as a report, or select the ‘View Details’ next to the staff whose record you want to view.

On their training record, you can see all face to face and online learning they have booked on to. This will include, attended, cancelled, completed and uncompleted training. It shows the start date, completed date, course code, course title, who booked it, when it was booked, the status of the booking and the competence of the booking (attended/not-attended, pass/fail, booked or cancelled).

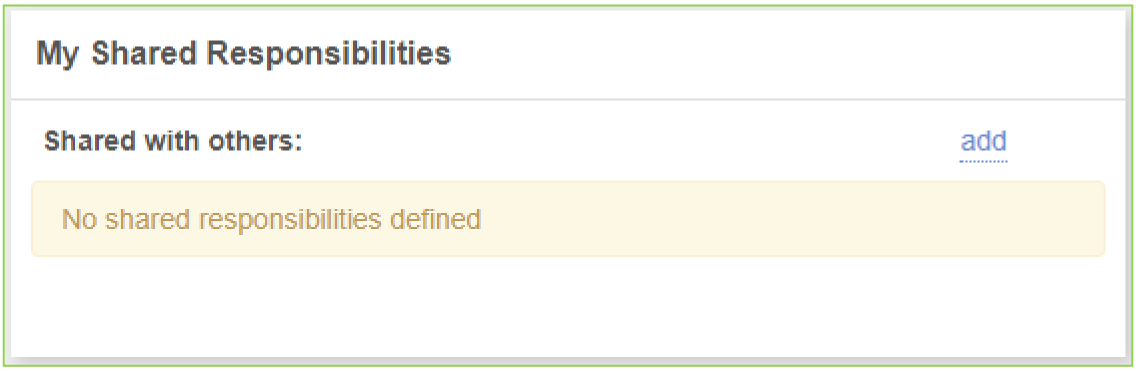
4. Personal Development Plan (PDP)

Click the users name to see their Development Plan.

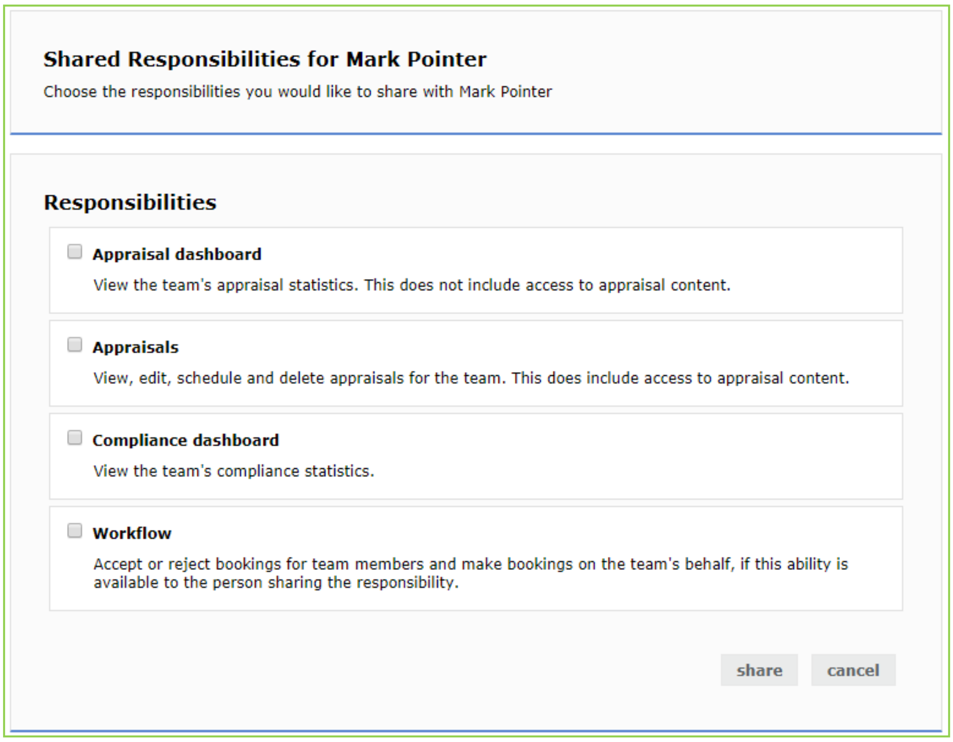
This will show you any Active or Historical Development plans from your staff. They are separated into Compulsory and Non-compulsory.

5. Shared Responsibilities

Click ‘add’ and search for the person that will share your team’s responsibility with you.



Select the appropriate responsibilities to share with the user then click share.



The user will have 14 Days to respond to email request to accept these responsibilities.