


Adding and removing team members

As a manager on the LEaD training website you can check your team, and your team’s team for their compliance in statutory and mandatory training requirements. The manager has full control of adding and removing team members from your team.


Adding a person: Step 1

From your homepage you will need to focus on the section below:


To edit your team please click on Edit link



My Team



[Edit](#) [Certificates](#) [Training Records](#)



[Shannon Thomas](#)

[View Details](#)


Adding a person: Step 2

In the edit group page you have two options add and remove. To add a team member to your team click the add button

Edit Group

Group name

Name	▼
Shannon Thomas 26599286	Southern Health NHS Foundation Trust (CP)



Adding a person: Step 3

This will take you to a search user page (**searching functions explained to the left**)
We recommend you search for your team member by assignment number to ensure you have the correct staff member, however full name will also find your staff member.

If you use **one word** in your search we will search the person's **surname, employee number and company name**. Include employees that have left the company

If you use **two words** we will search the person's **forename with the first word and their surname with the second word**.
For example **jo sm** will find Joe Smith.

You can either select a person from your search results below, or you can create a new person by clicking on **Add**.

Search Text:

Name	Employee Number	Company
Miss Fiona Leslie	27635159	Southern Health NHS Foundation Trust (CP)

1 user found.

Be mindful that you are using the name on the staff member's payslip and not preferred name.

Adding a person: Step 4

Once you have found your team member, click on their name. You will notice they will now appear in your group. Once all have been added, click the blue 'Save' button at the bottom of the page.

Edit Group

Group name:

Name	Employee Number	Company
Shannon Thomas	26599286	Southern Health NHS Foundation Trust (CP)
Fiona Leslie	27635159	Southern Health NHS Foundation Trust (CP)

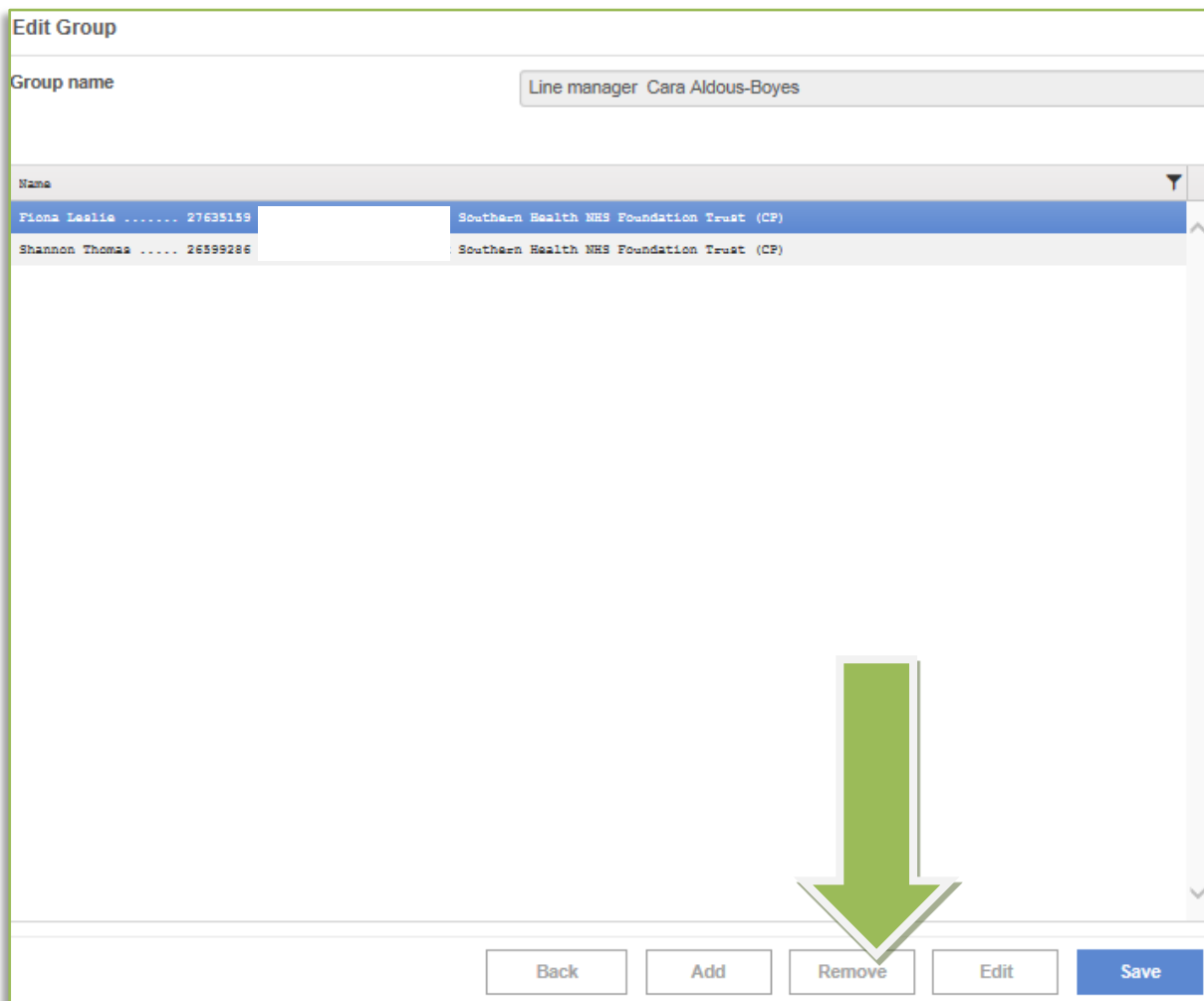
Removing a person: Step 1

To edit your team please click on the “Edit” link



Removing a person: Step 2


To remove a team member, you need to highlight the person you wish to remove by clicking onto their name and then click the remove button.



Edit Group

Group name

Name
Shannon Thomas 26599286 : Southern Health NHS Foundation Trust (CP)



This person will then be removed from your list. Please click the white “Save” button at the bottom of the page to save these changes

Be aware that if you are removing somebody you are taking them out of the team completely. Please ensure that the person, or even their new Line Manager, knows they no longer have a Manager on the LEaD Training system. Their new Line Manager should add them as a team member as soon as possible.