



2023

# Administrator User Manual

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## Document Status

Issue Status	Version	Updated	Published
First Publication	1.0	N/A	10/04/2019
Second Publication	2.0	Updated to bring in line with changes to SkillsBackbone	09/05/2023
Third Publication	3.0	Updated to include new functionality for First-time Trainer Observation booking & payment	18/09/2023

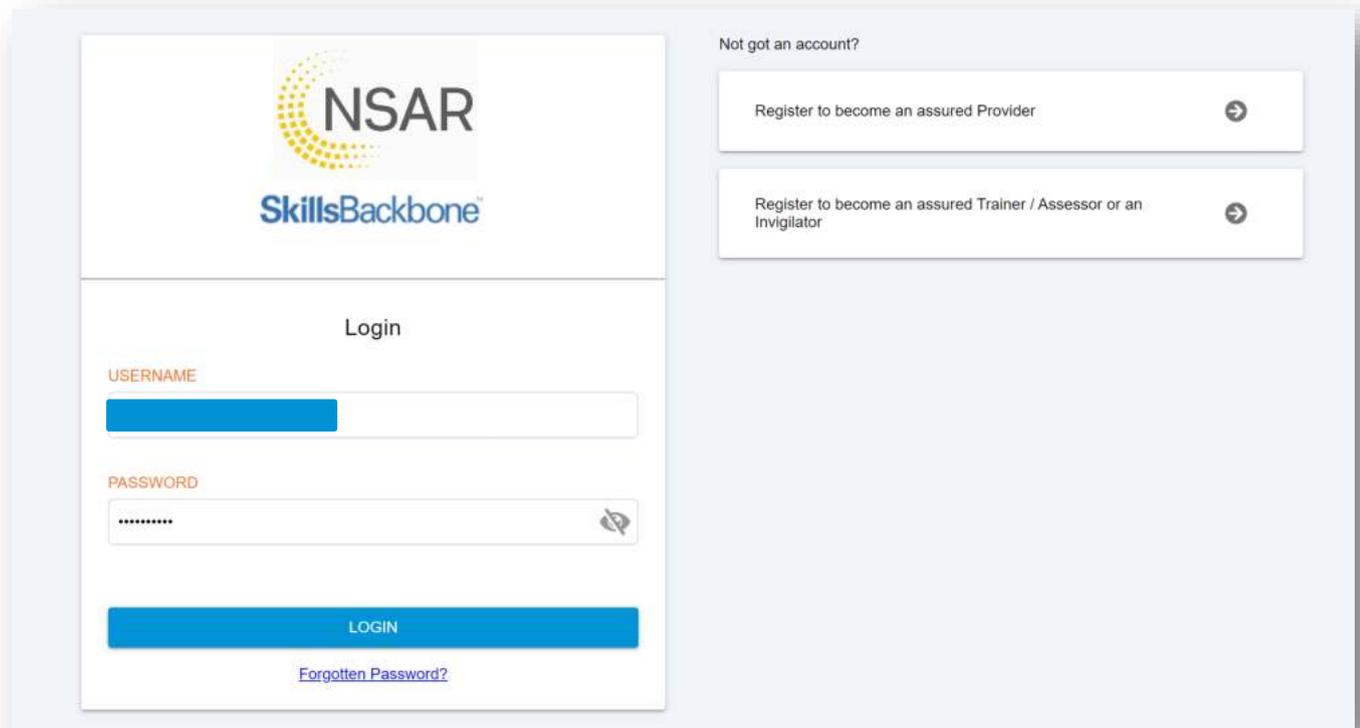
### *Important Note:*

*The screenshots contained within this user manual have been created using live provider information in order to make the manual as realistic as possible.*

*Names of Assured Providers and Trainer/Assessors have been removed in order to maintain data privacy. Where Provider and/or Trainer/Assessors names have been removed, your own Provider name and Assured Trainer/Assessors will display resulting in your view not showing as this user manual in every aspect of screen information.*

*This will become clear once you start to use Skills Backbone.*

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21-24 Millbank, London, SW1P 4QP**



The screenshot shows the NSAR SkillsBackbone login interface. On the left, there is a login form with the NSAR SkillsBackbone logo at the top. Below the logo, the word "Login" is centered. There are two input fields: "USERNAME" and "PASSWORD". The "PASSWORD" field has a toggle icon for visibility. A blue "LOGIN" button is at the bottom of the form, with a link for "Forgotten Password?" below it. On the right side, under the heading "Not got an account?", there are two registration buttons: "Register to become an assured Provider" and "Register to become an assured Trainer / Assessor or an Invigilator", both with right-pointing arrows.

Log In using the URL link and password which you have been issued, you will be taken to your landing page

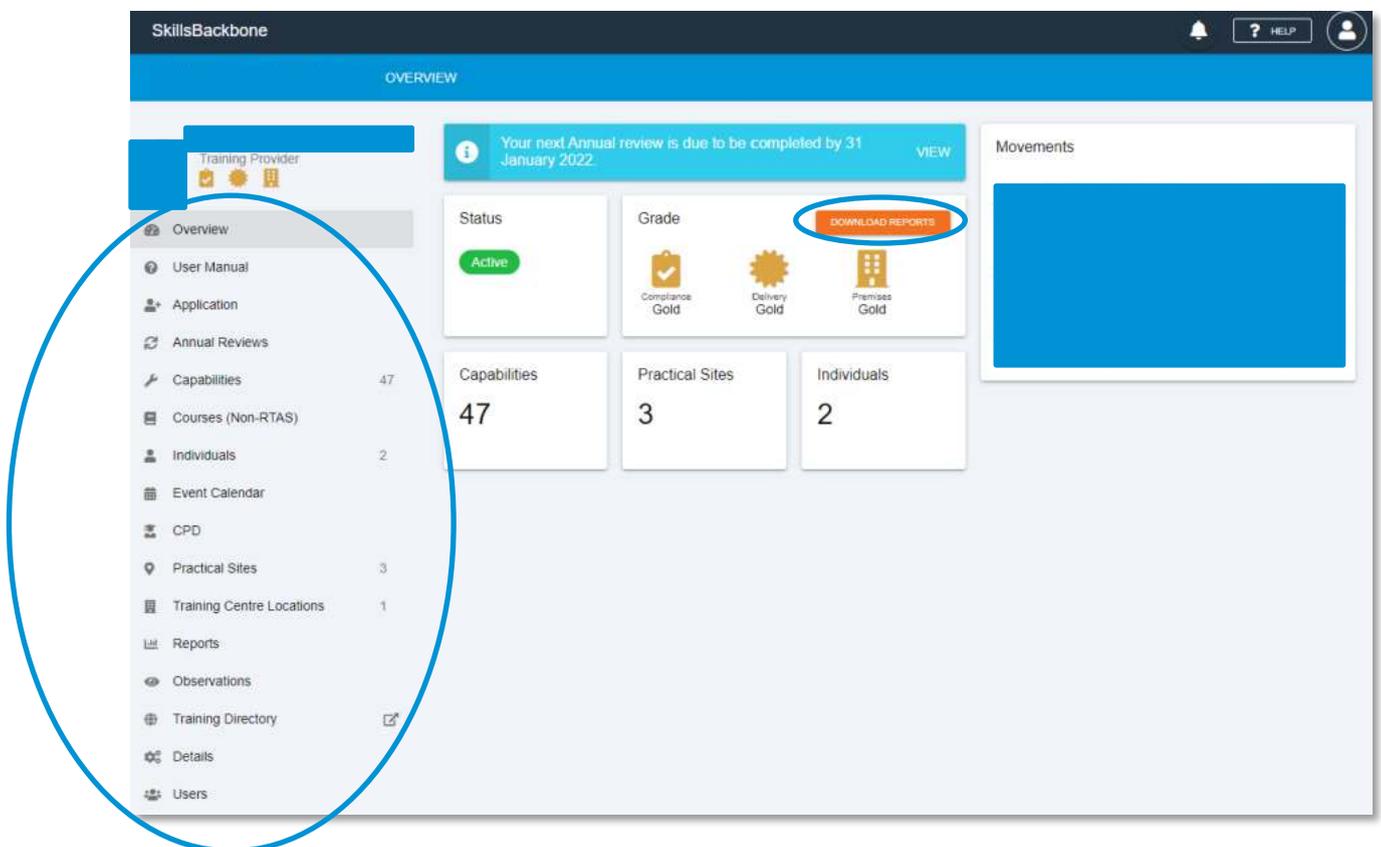
This manual will take you through each of the headings shown on the left-hand side of your landing page of the **Assured Provider** Overview.

**Trainer/Assessors** individuals' profiles have less options than that of the Assured Provider. What is seen on the **Individual** accounts will also be covered later in this manual.

## 1. Overview

Your **Assured Provider** log in will take you to your landing page which consists of a Dashboard of your provider information.

*N.B. Please note that what you see will be unique to you as a provider and not the exact detail below.*

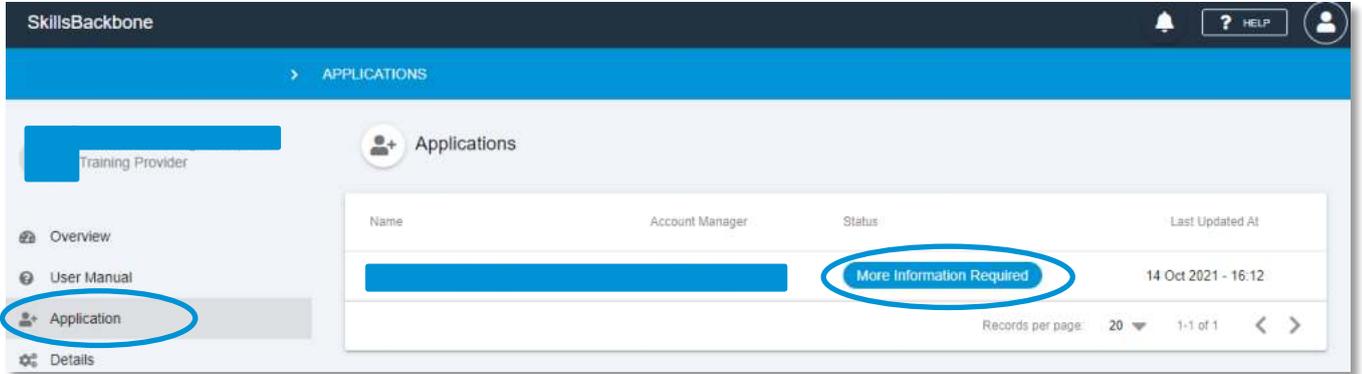


The screenshot displays the SkillsBackbone Overview dashboard. The navigation menu on the left includes: Overview, User Manual, Application, Annual Reviews, Capabilities (47), Courses (Non-RTAS), Individuals (2), Event Calendar, CPD, Practical Sites (3), Training Centre Locations (1), Reports, Observations, Training Directory, Details, and Users. The main content area features a status bar indicating 'Your next Annual review is due to be completed by 31 January 2022'. Below this, there are several data cards: Status (Active), Grade (Compliance Gold, Delivery Gold, Premises Gold), Capabilities (47), Practical Sites (3), and Individuals (2). A 'DOWNLOAD REPORTS' button is highlighted in the Grade section. A 'Movements' section is also visible on the right.

You can download your current NSAR report from this Dashboard. The sections on the left-hand side of the screen are your action sections.

## 2. Application

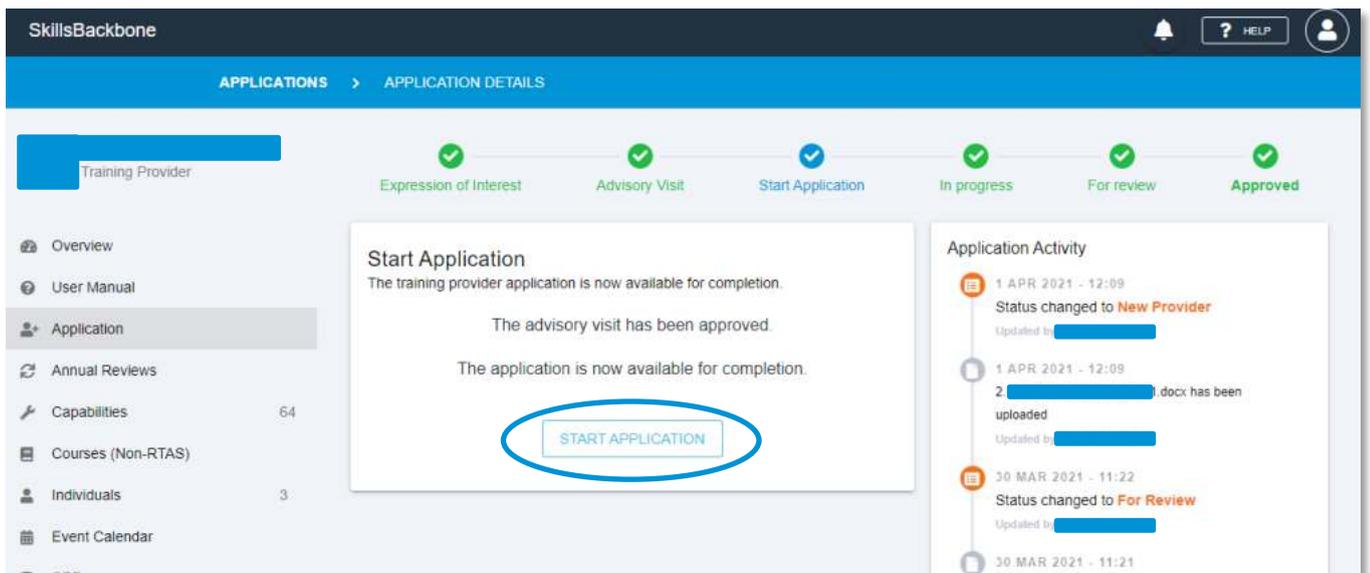
You can see your current Provider Application here.



The screenshot shows the SkillsBackbone interface. The top navigation bar includes 'SkillsBackbone', a notification bell, a 'HELP' button, and a user profile icon. Below this is a blue header with 'APPLICATIONS'. The main content area is titled 'Applications' and features a table with columns for Name, Account Manager, Status, and Last Updated At. A single application is listed with the status 'More Information Required', which is circled in blue. The left sidebar contains a menu with 'Application' highlighted in blue. At the bottom right of the table, it indicates 'Records per page: 20' and '1-1 of 1'.

This section is most relevant when the provider is undergoing their initial application status. When you click on the 'Application' button on the left it shows you your applications current status.

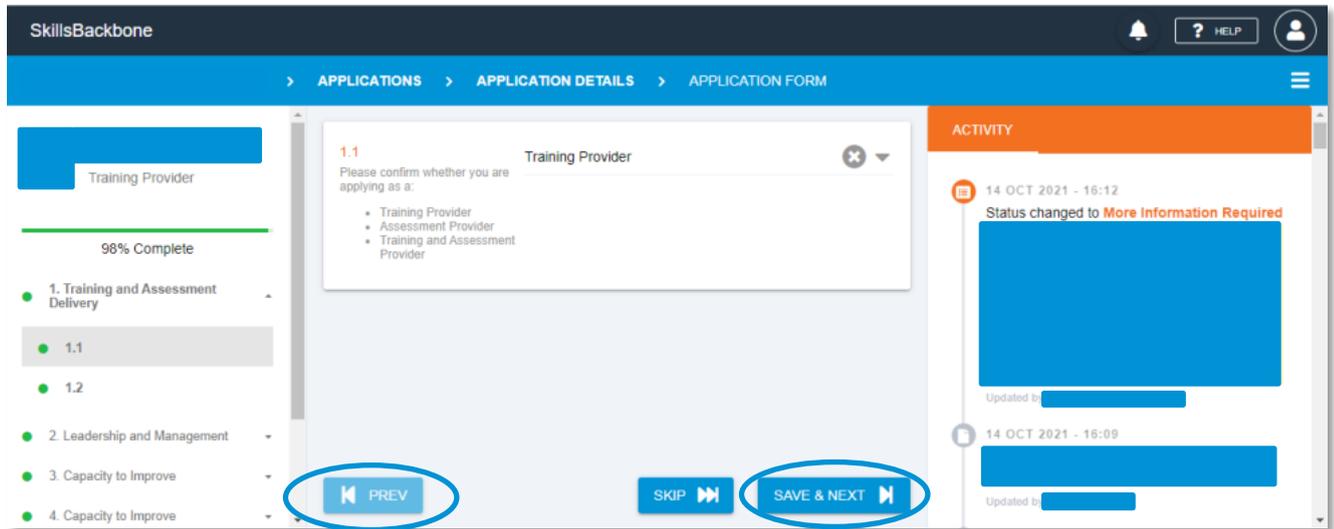
To view the application, click on the status description. The right-hand side of the screen is a timeline and will show the application activity and completed stages i.e., in progress, submitted for review etc.



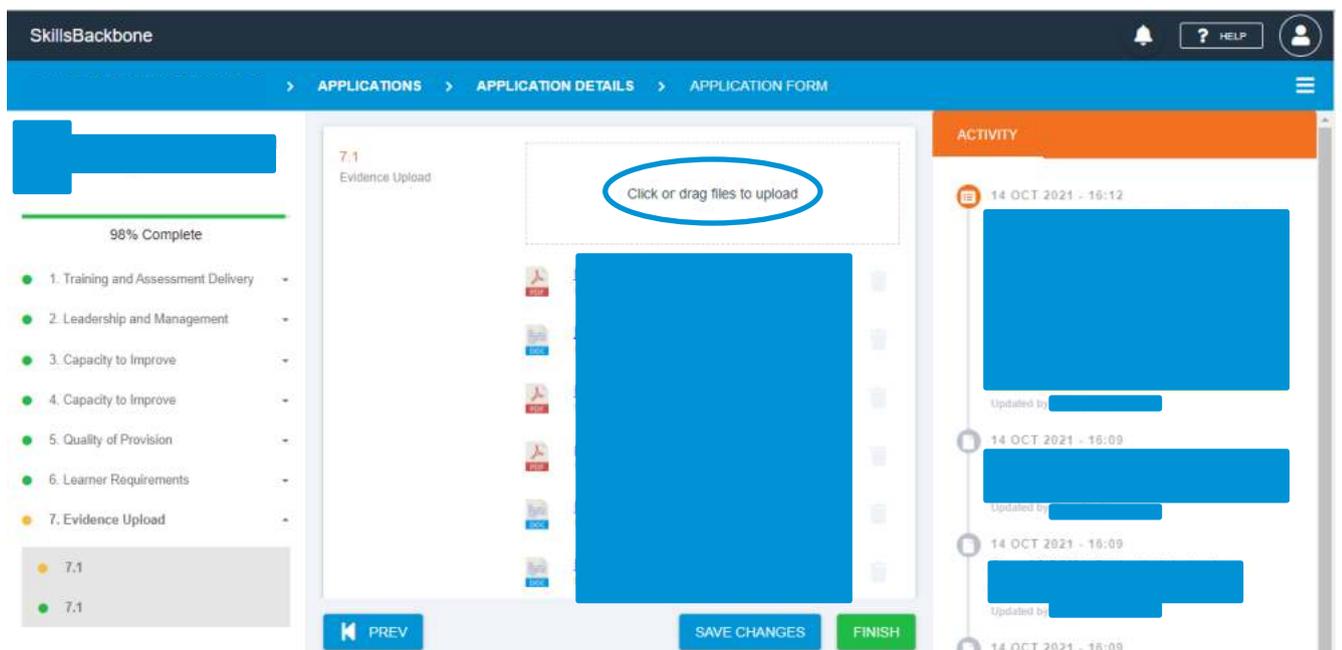
The screenshot shows the SkillsBackbone 'APPLICATION DETAILS' page. The top navigation bar includes 'SkillsBackbone', a notification bell, a 'HELP' button, and a user profile icon. Below this is a blue header with 'APPLICATIONS' and 'APPLICATION DETAILS'. The main content area features a progress bar with six stages: 'Expression of Interest', 'Advisory Visit', 'Start Application', 'In progress', 'For review', and 'Approved'. The 'Start Application' stage is currently active. Below the progress bar, there is a 'Start Application' button circled in blue. To the right, the 'Application Activity' timeline shows three events: 'Status changed to New Provider' on 1 APR 2021, '2 [redacted].docx has been uploaded' on 1 APR 2021, and 'Status changed to For Review' on 30 MAR 2021. The left sidebar contains a menu with 'Application' highlighted in blue.

When clicking on Start Application, the system will take you in to your application and uploads.

To complete the application type directly into the text boxes or select set options from the drop down lists. Viewing through the application can be done by navigation buttons at the bottom of the screen.



When you reach the final section, please upload all required evidence to support the application by dragging and dropping the information into the box or clicking on the box itself to open a file search box.

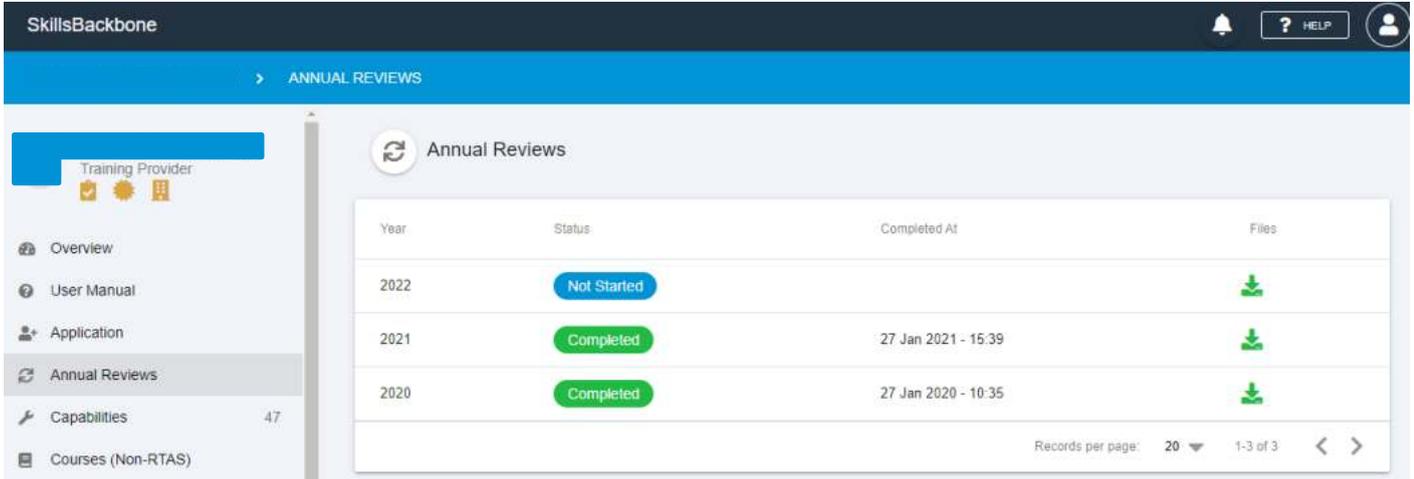


Once completed press **'SAVE CHANGES'** and then press the green **'FINISH'** button at the bottom of the application.

### 3. Annual Reviews

This tab allows providers to complete their yearly Annual Review and to view previous years submissions.

The date this is due to shown on the providers Overview page.



Year	Status	Completed At	Files
2022	Not Started		
2021	Completed	27 Jan 2021 - 15:39	
2020	Completed	27 Jan 2020 - 10:35	

To complete the Annual Review, click on the 'Status' of the current year's annual review. This will contain the information from the previous years submission for providers to review and edit. The process to complete and navigate the review is the same as the Application.

To download previous years annual reviews, click the green symbol on the right.

When the Annual Review has been completed make sure to **'SAVE CHANGES'** and then press the Green **'SUBMIT ANNUAL REVIEW'** button.

SAVE CHANGES

SUBMIT ANNUAL REVIEW

***N.B. Please note that before your Quality Assurance Visit a providers assigned Quality Assurance Manager will read your annual review and go through the uploaded documentation. To help the visit be completed effectively please make sure that all policies, procedures, certificates etc. uploaded in Section 7 of the Annual Review are the current versions.***

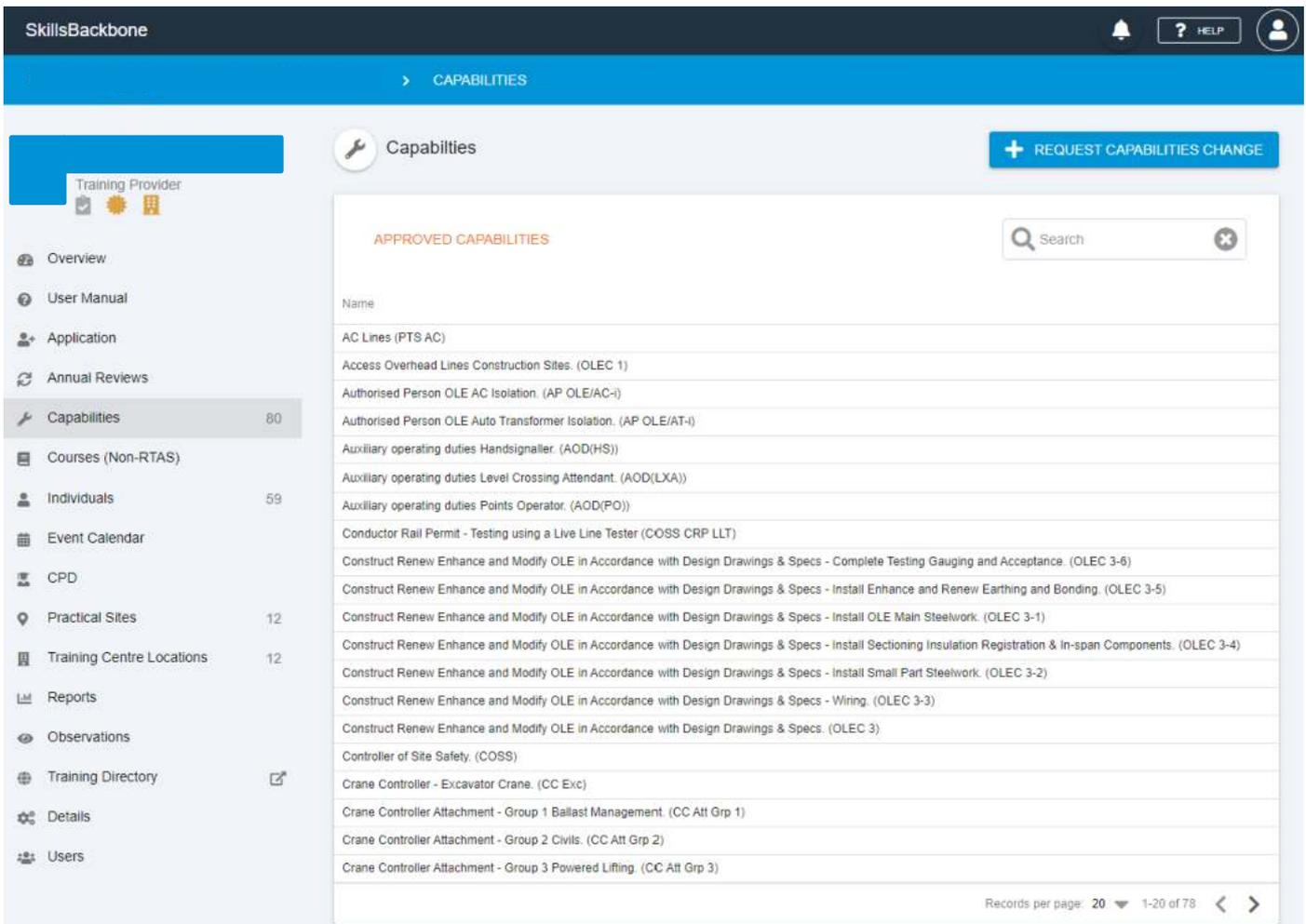
## 4. Capabilities

***N.B. This is Assured Provider capabilities – Trainer/Assessor capabilities is contained under ‘Individuals’ which is covered later within this user manual.***

This tab displays all current capabilities that a provider holds, and the ‘Search’ function can be used to search the list of current approved capabilities.

***Note: All Providers must ensure that their capability list is kept up to date to allow maintaining accuracy of Sentinel Provider Capabilities, Training Directory and the Events Calendar.***

You can also add new or delete no longer required capabilities from this section of the portal.



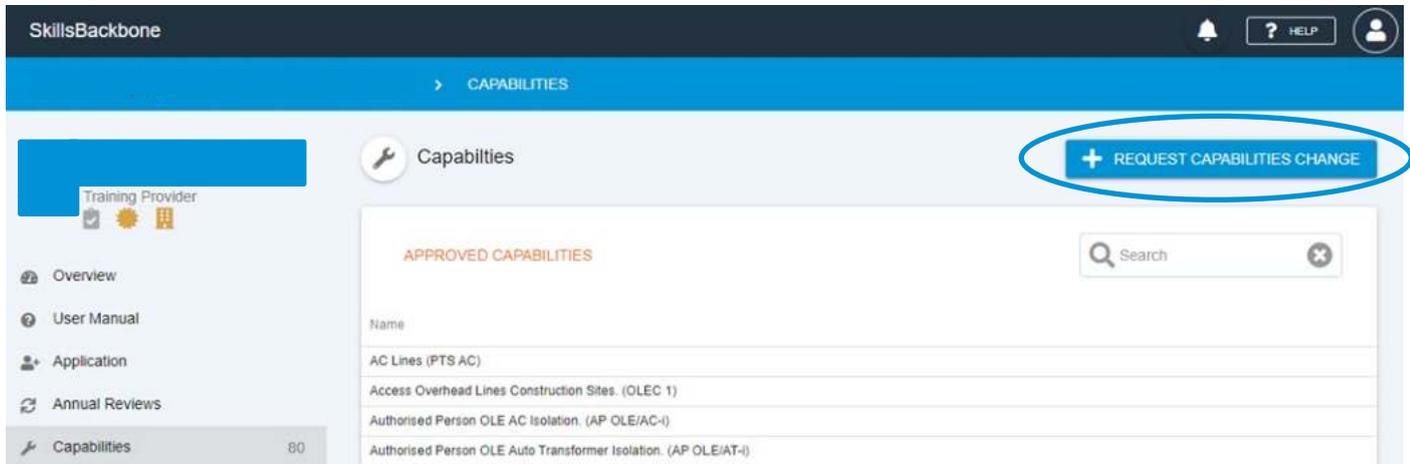
The screenshot shows the SkillsBackbone interface for the 'Capabilities' section. The page title is 'SkillsBackbone' and the breadcrumb is '> CAPABILITIES'. The main heading is 'Capabilities' with a '+ REQUEST CAPABILITIES CHANGE' button. A search bar is present with the text 'APPROVED CAPABILITIES' and a search icon. The table below lists various capabilities:

Name
AC Lines (PTS AC)
Access Overhead Lines Construction Sites. (OLEC 1)
Authorised Person OLE AC Isolation. (AP OLE/AC-I)
Authorised Person OLE Auto Transformer Isolation. (AP OLE/AT-I)
Auxiliary operating duties Handsignaller. (AOD(HS))
Auxiliary operating duties Level Crossing Attendant. (AOD(LXA))
Auxiliary operating duties Points Operator. (AOD(PO))
Conductor Rail Permit - Testing using a Live Line Tester (COSS CRP LLT)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs - Complete Testing Gauging and Acceptance. (OLEC 3-6)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs - Install Enhance and Renew Earthing and Bonding. (OLEC 3-5)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs - Install OLE Main Steelwork. (OLEC 3-1)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs - Install Sectioning Insulation Registration & In-span Components. (OLEC 3-4)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs - Install Small Part Steelwork. (OLEC 3-2)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs - Wiring. (OLEC 3-3)
Construct Renew Enhance and Modify OLE in Accordance with Design Drawings & Specs. (OLEC 3)
Controller of Site Safety. (COSS)
Crane Controller - Excavator Crane. (CC Exc)
Crane Controller Attachment - Group 1 Ballast Management. (CC Att Grp 1)
Crane Controller Attachment - Group 2 Civils. (CC Att Grp 2)
Crane Controller Attachment - Group 3 Powered Lifting. (CC Att Grp 3)

Records per page: 20 1-20 of 78

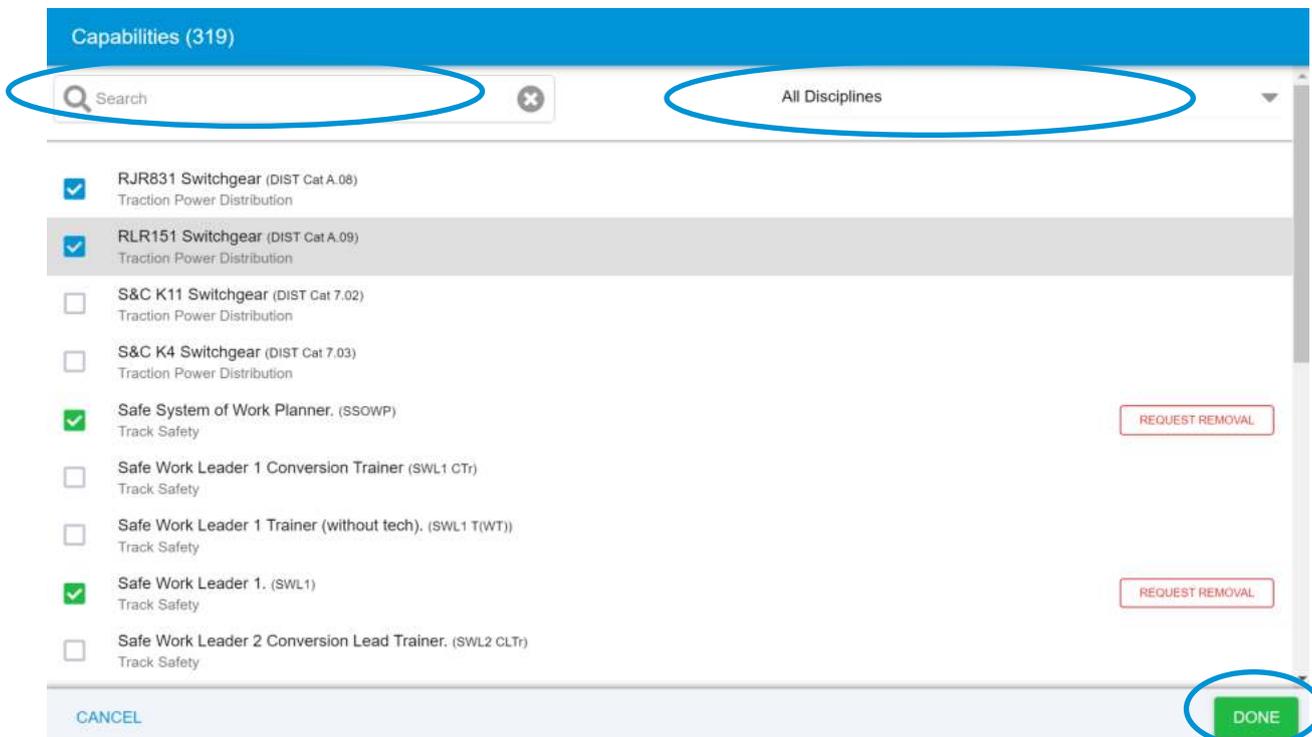
## 4.1. Adding a Provider capability

To request an increase to provider scope i.e. new capability use the **'REQUEST CAPABILITIES CHANGE'** button.



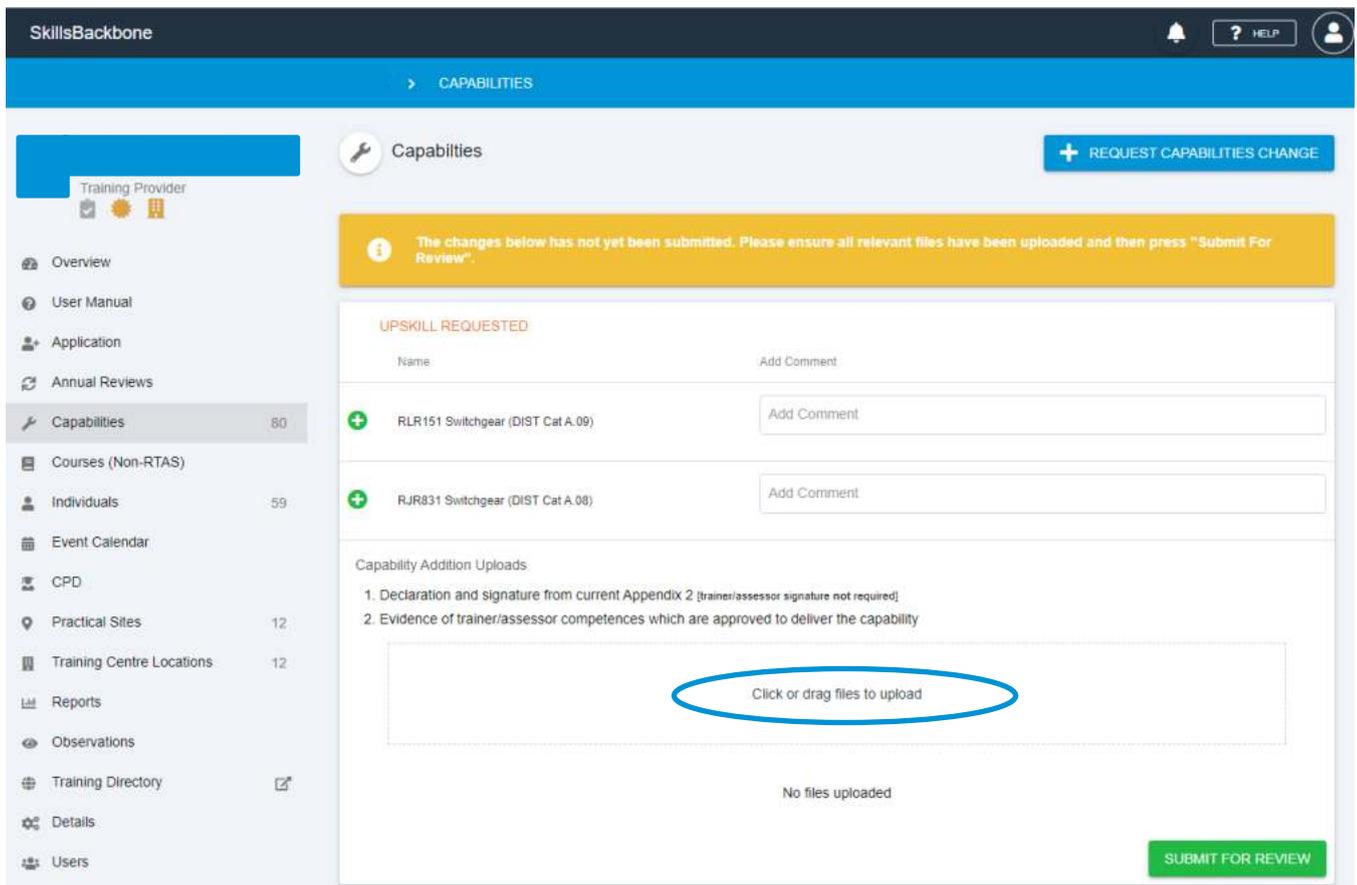
This will open the edit capabilities list window where the capabilities approved are detailed and where you find the new capability to be requested.

*Note you can search for the capability quickly and narrow the list to a specific discipline.*

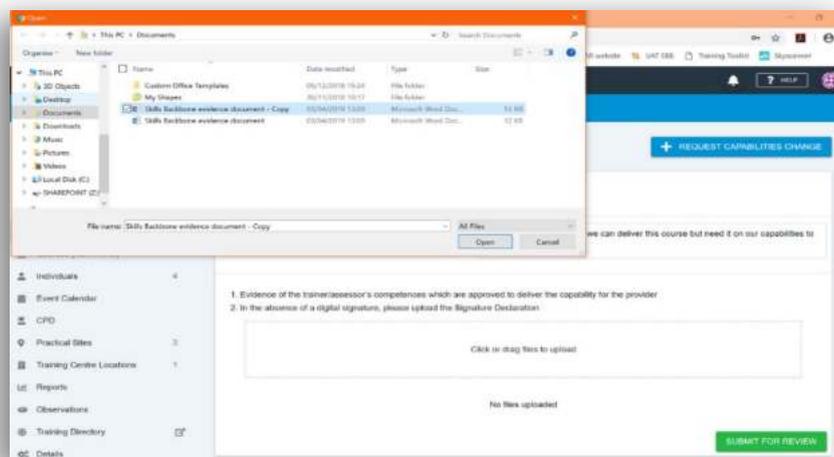


Once you have found the capability required then tick the box next to it – note the blue colour which highlights which ones are being requested as new capabilities vs the green ones which are already approved. When finished select **'DONE'**

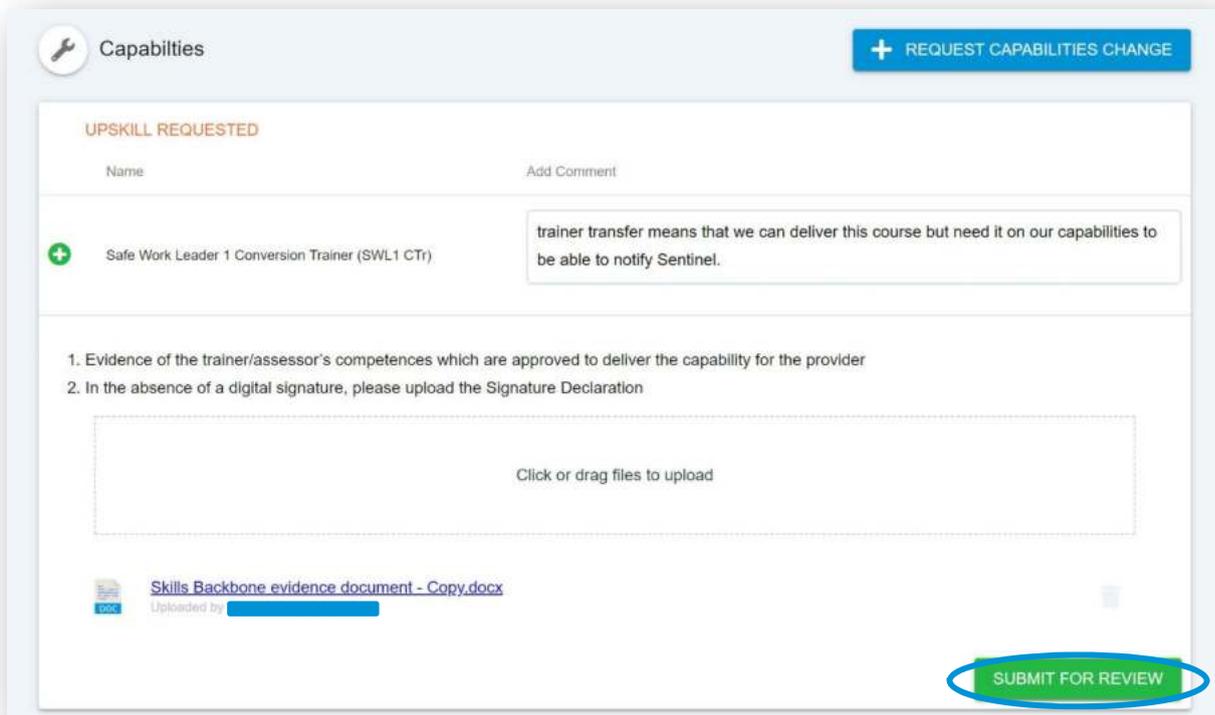
This will take you to a capability change input screen where you can add comments to the application and also upload the files required.



Add the notes that you want to make and then attach the files by clicking in or dragging files in to the upload box circled above. If you prefer to click and search rather than drag the click in the box. This will open a file search box.



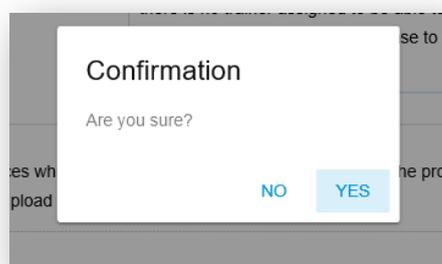
Select the file that you want and click **Open**. You can add more than one file at a time. The system will return you to the input page with the file attached for you complete your comments.

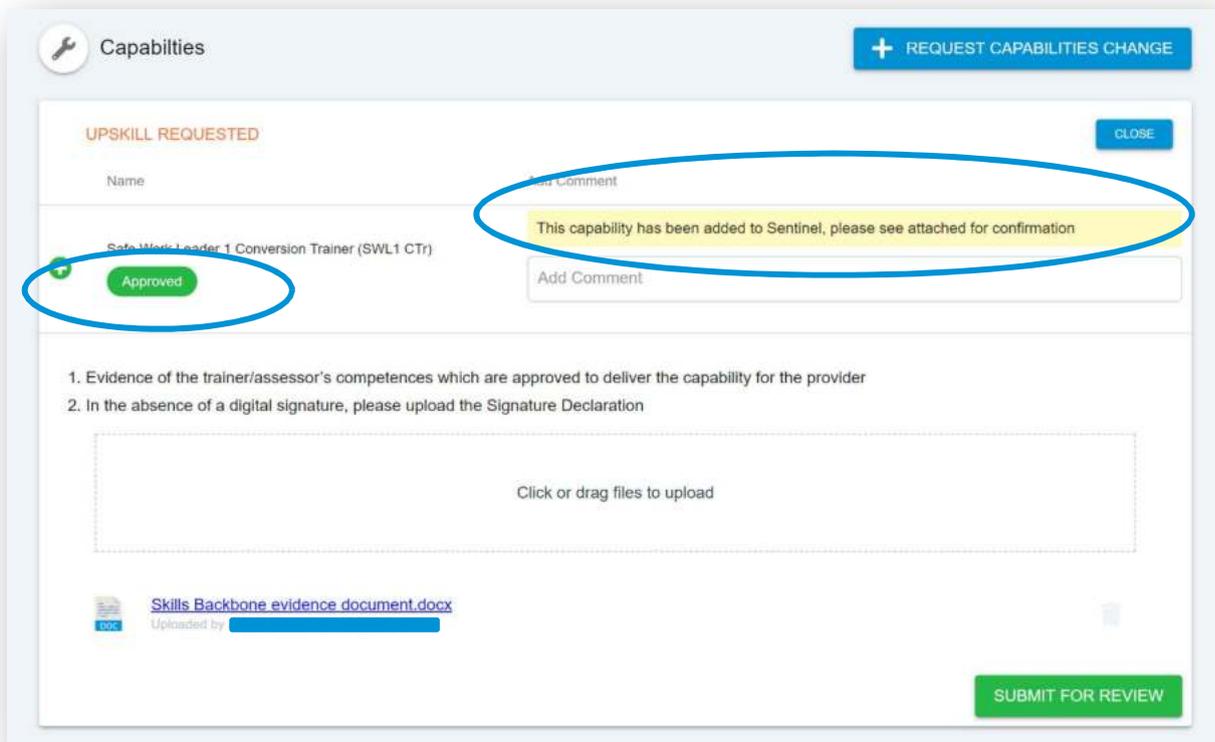


If you have made an error in the upload of a file you can remove this by using the 'dust-bin' icon showing in grey next to the attachment title

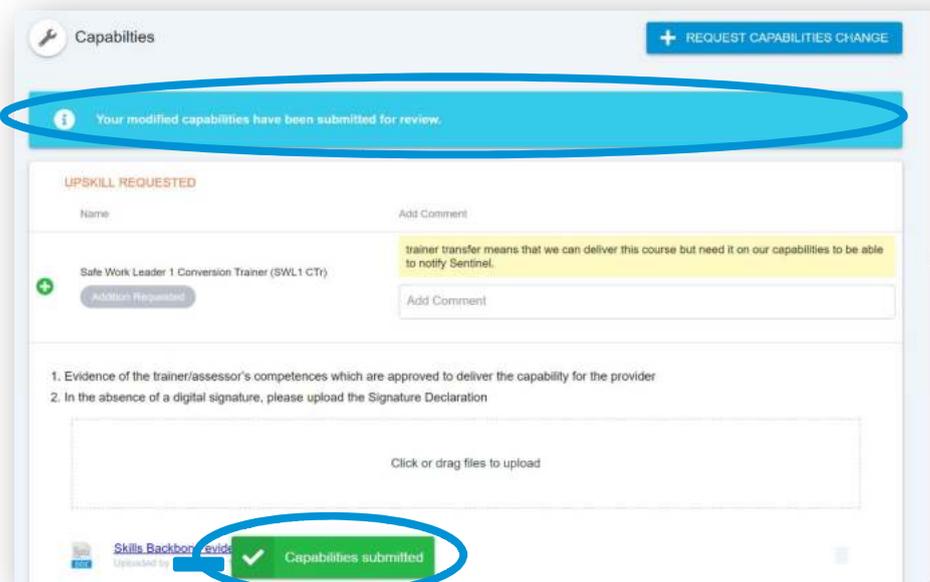


When you click on this icon the system will ask you if you are sure you want to delete the file.





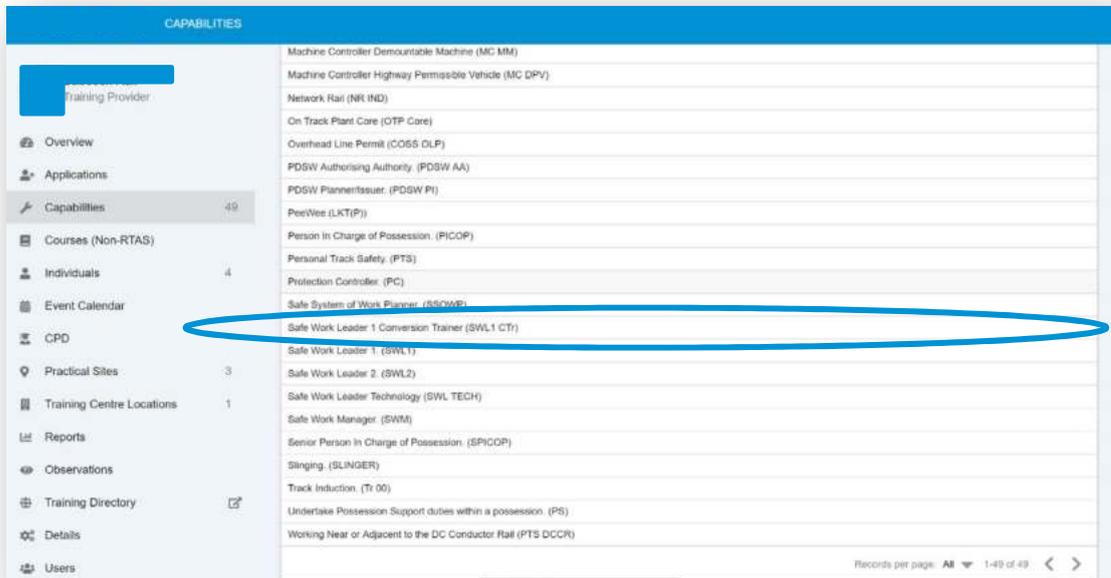
When NSAR has taken action you will see the following.



**Approved** increase to scope

You will see that it now shows as approved, you can see the comments added by QA and open any files which have been attached to the response.

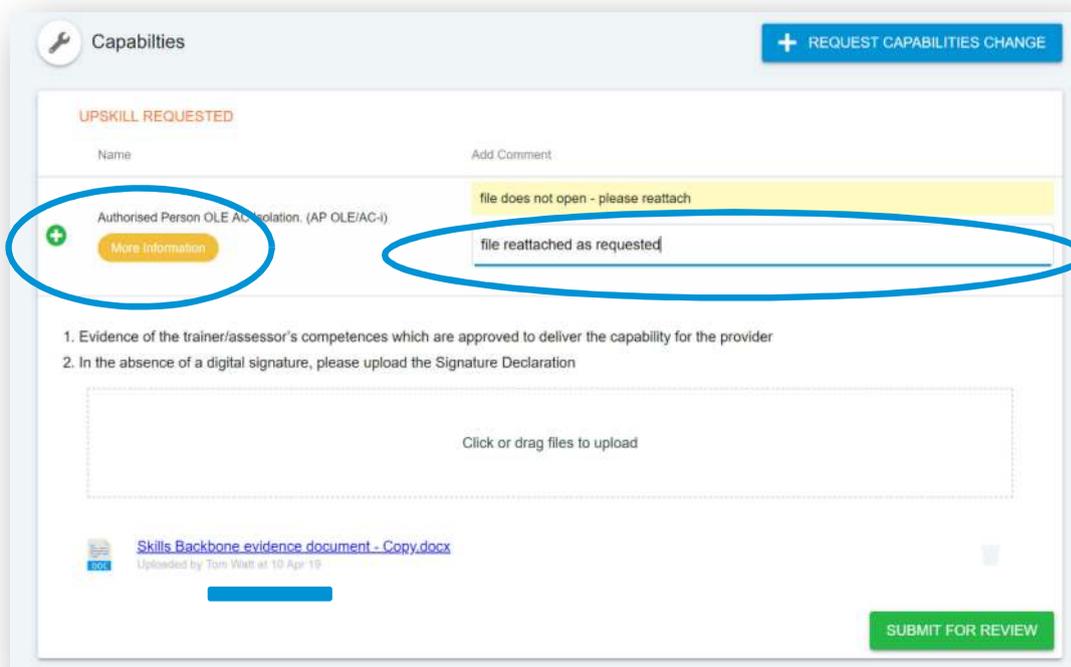
You can then **CLOSE** this window which will return you to the list of approved capabilities and you will see the newly awarded one included in that list.



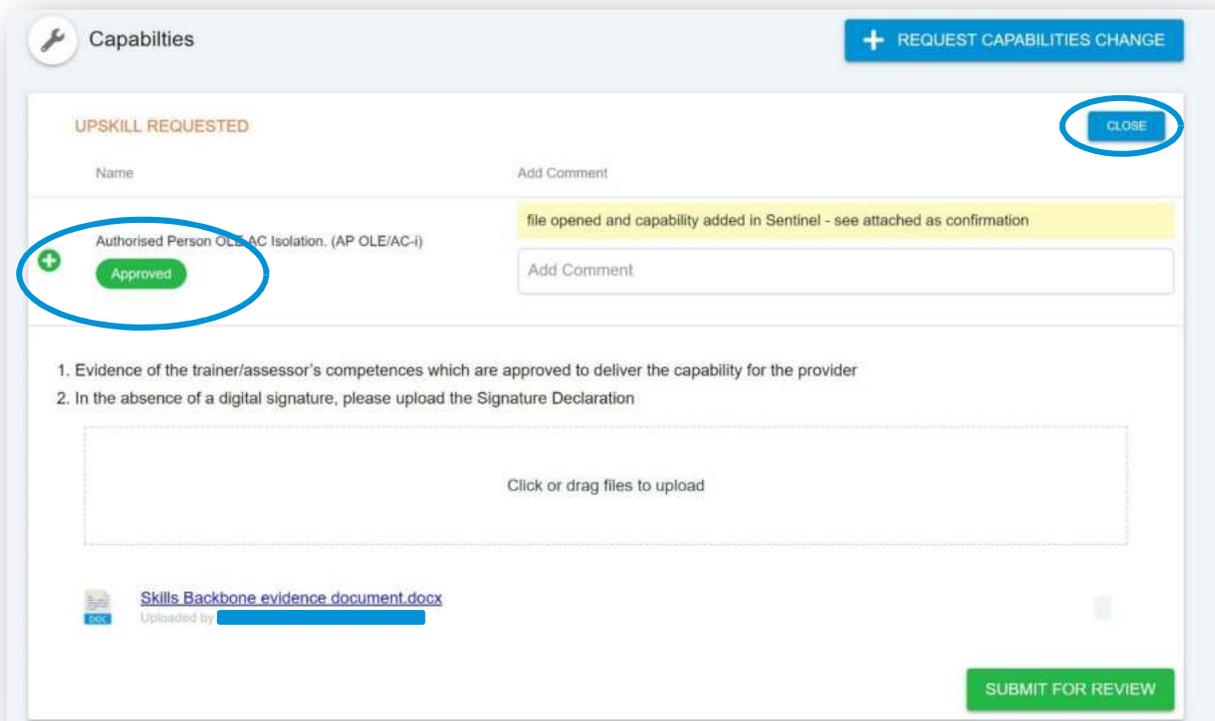
**More Information** required before increase to scope is awarded

You will see that it now shows as More Information and you can see the comments added by NSAR QA, advising the reason for the status change from Requested to More Information.

Take the action that you have been asked to by the NSAR QA comments and add your own comments in response confirming what ever action has been requested.



When you are finished, click **'SUBMIT FOR REVIEW'** again to return the request to NSAR QA. If it is then approved at this stage you will see this is the case, view the comment returned and open any files which have been attached as part of the confirmation response from NSAR QA.



**Capabilities** + REQUEST CAPABILITIES CHANGE

**UPSKILL REQUESTED** CLOSE

Name	Add Comment
<span style="color: green;">+</span> Authorised Person OLE/AC Isolation. (AP OLE/AC-i) <span style="background-color: green; color: white; border-radius: 5px; padding: 2px 5px;">Approved</span>	<div style="background-color: yellow; padding: 5px;">file opened and capability added in Sentinel - see attached as confirmation</div> <input type="text" value="Add Comment"/>

1. Evidence of the trainer/assessor's competences which are approved to deliver the capability for the provider  
 2. In the absence of a digital signature, please upload the Signature Declaration

Click or drag files to upload

 [Skills Backbone evidence document.docx](#)  
 Uploaded by [REDACTED]

SUBMIT FOR REVIEW

You can then **'CLOSE'** this window which will return you to the list of approved capabilities and you will see the newly awarded one included in that list.



**Capabilities** + REQUEST CAPABILITIES CHANGE

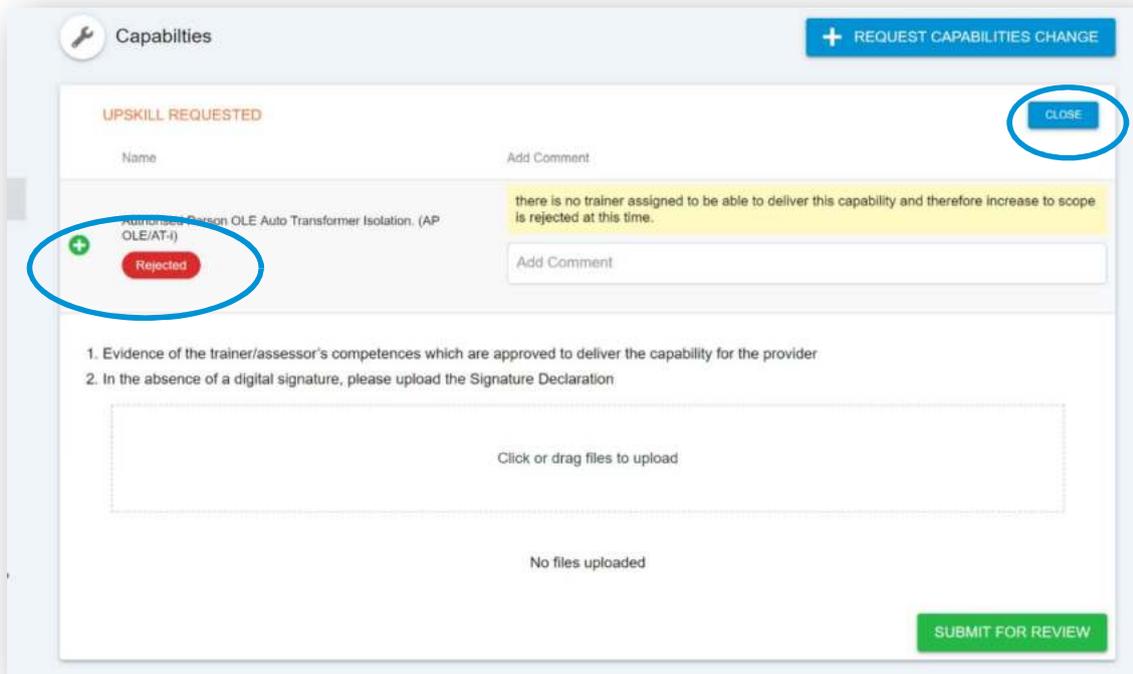
**APPROVED CAPABILITIES** Search

Name
AC Lines (PTS AC)
Access Overhead Lines Construction Sites. (OLEC-1)
<span style="border: 2px solid blue; border-radius: 50%; padding: 2px;">Authorised Person OLE/AC Isolation. (AP OLE/AC-i)</span>
Auxiliary operating duties Handspooler. (POD0102)
Conductor Rail Permit - Testing using a Live Line Tester (COSS CRP LLT)
Controller of Site Safety. (COSS)
COSS Theory. (COSS Theory)
Crane Controller - Excavator Cranes. (CC Exc)
Crane Controller Attachment - Group 2 Cables. (CC Alt Grp 2)
Crane Controller Attachment - Group 3 Powered Lifting. (CC Alt Grp 3)

Records per page: 10 | 1-19 of 50 | < >

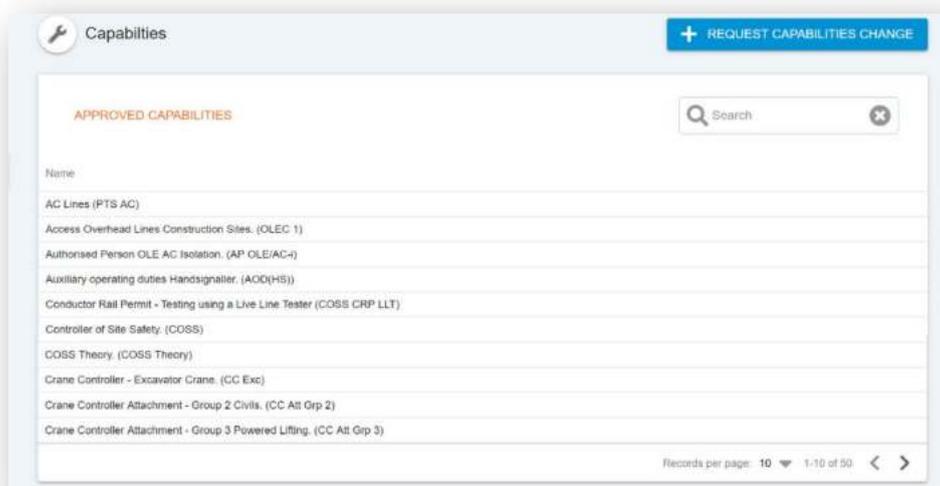
**Rejected** increase to scope

If NSAR QA has rejected an increase to scope you will see this and the comments clearly against the item.



If you wish to challenge this, you are required to request the capability change again or contact the QA team directly via Freshdesk in order to resolve any issue which was the reason for the rejection.

You can then close this window which will return you to the list of approved capabilities and you will see the newly awarded one included in that list. You will note that the rejected capability request does not appear on the list of approved capabilities.

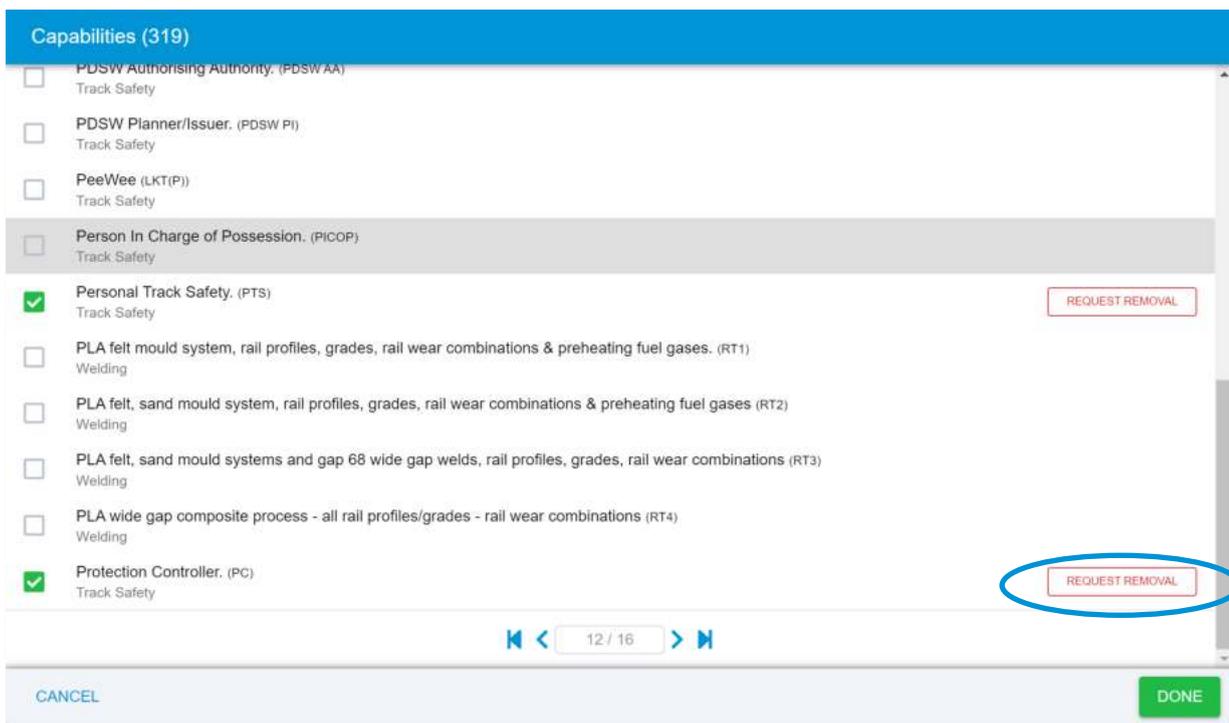


## 4.2. Removing a Provider capability

To remove a capability, you need to **'REQUEST A CAPABILITY CHANGE'** again.



This opens the capability edit window. You will note that next to each currently approved capability there is a button to request the removal of this.

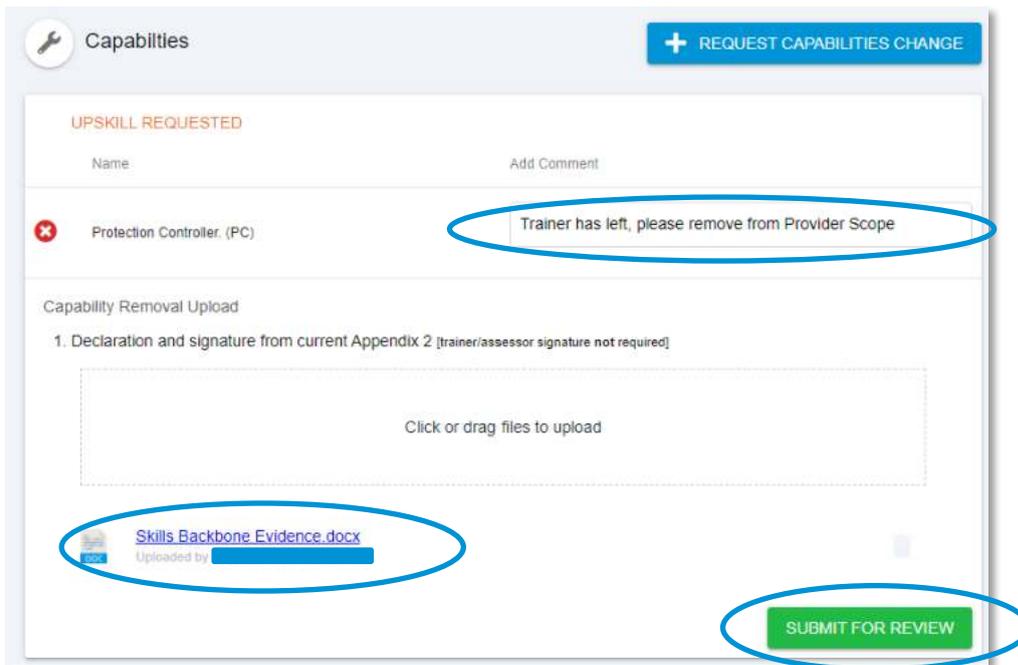


When selected the system will confirm this giving you opportunity to CANCEL if you have clicked this in error.

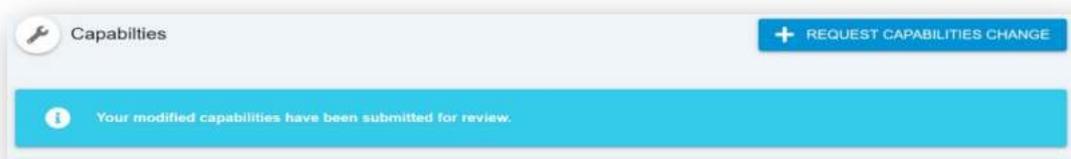


If this was the intended action and you wish to request the removal of the capability, then confirm this by clicking **‘DONE’**

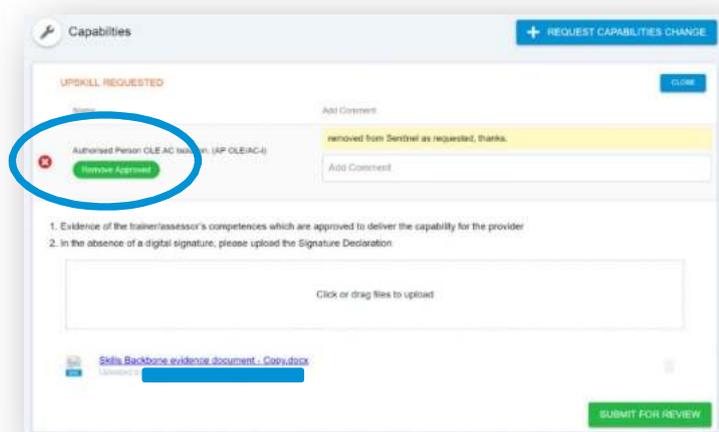
The system will return you to the capabilities change request input window, showing that a rejection is being requested. Add any comments or attach any files that you want to add to the request and then **‘SUBMIT FOR REVIEW’**



The system will again confirm submission by the pop-up notification and by the blue bar at the top of the screen. The removal request has now been sent to NSAR QA.



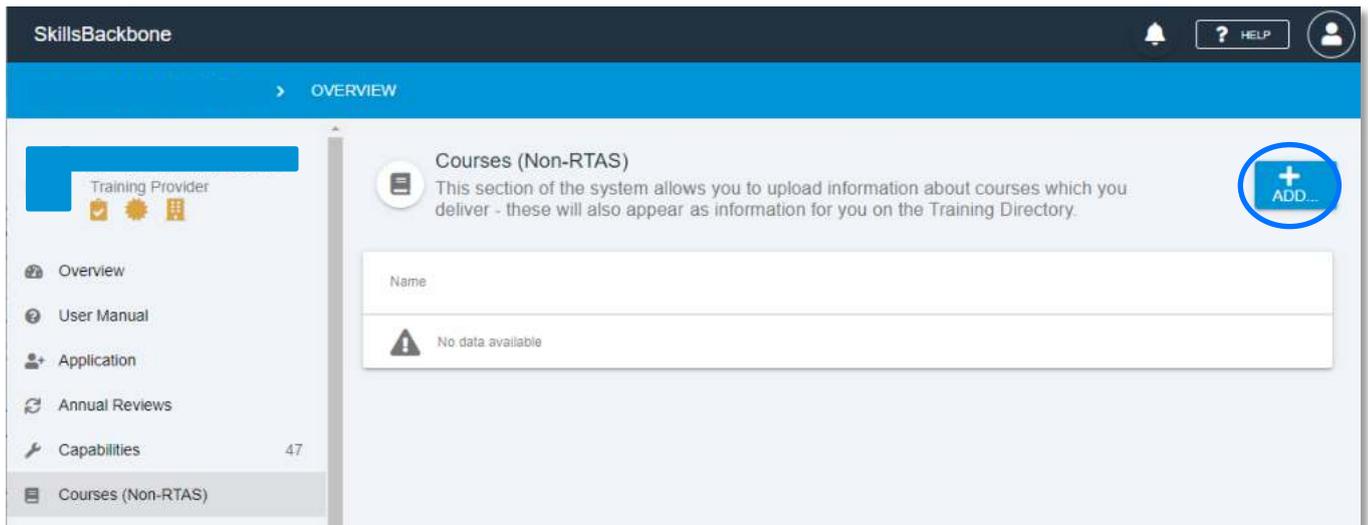
NSAR can either approve or reject your removal request. When approved or rejected you will just note the change in the outcome. Below is approved, if it is rejected for any reason you will see the ‘rejected’ icon rather than the below:



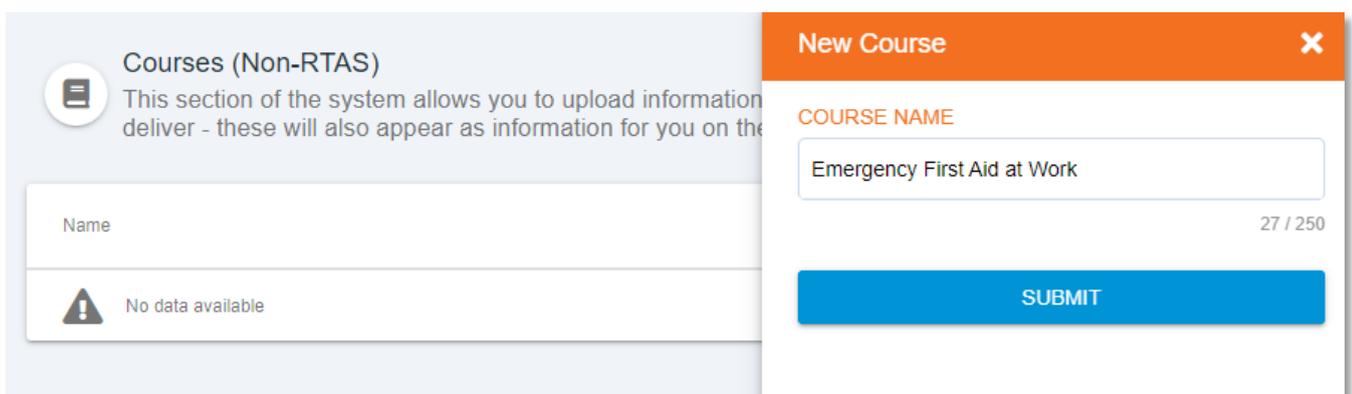
## 5. Courses (Non-RTAS)

This section of the system allows you to upload information about courses which you deliver that you would like featured within your Skills Backbone Portal – these will also appear as information for you on the Training Directory.

Use the **+ADD** button to do this.



This will open up a side window asking for the course name.



Add the detail that you want to add and then press **SUBMIT**. This will add it to a list of Courses (Non-RTAS) and display on the Training Directory which is covered later in this user manual.

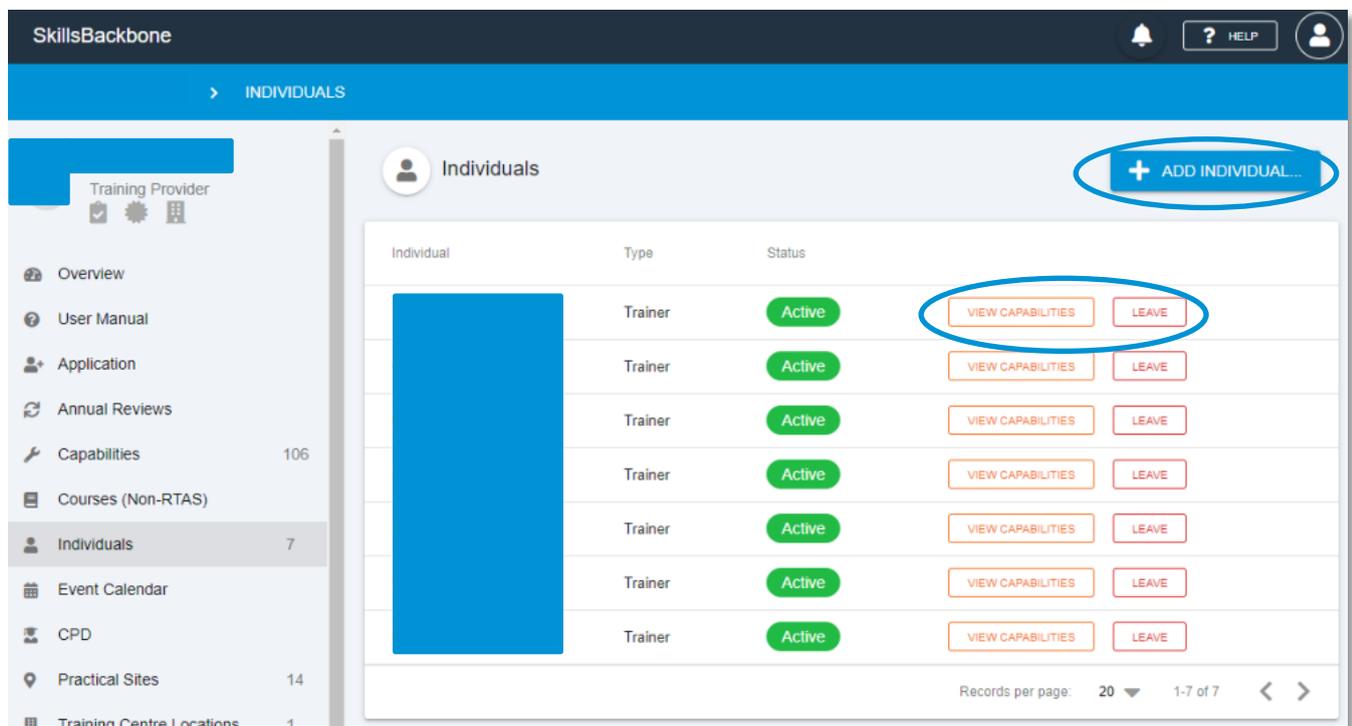
## 6. Individuals

***N.B. This is the Individual Trainer/Assessor action area***

This section contains all information relating to the individual Trainer and Assessors which you have aligned to you as a provider and is where you action all leavers, joiners, and capability changes.

**Invigilators are now no longer required to be added to SkillsBackbone.**

The landing page contains a list of all trainer/assessors aligned to you as a provider and has shortcut buttons to view capabilities, notify deactivation and request transfers. It also has a progress section for pending joiners so you can see the progress of completing that request.



The screenshot shows the SkillsBackbone interface for the 'INDIVIDUALS' section. On the left is a navigation menu with options like Overview, User Manual, Application, Annual Reviews, Capabilities (106), Courses (Non-RTAS), Individuals (7), Event Calendar, CPD, Practical Sites (14), and Training Centre Locations (1). The main content area is titled 'Individuals' and features a '+ ADD INDIVIDUAL...' button. Below this is a table with the following structure:

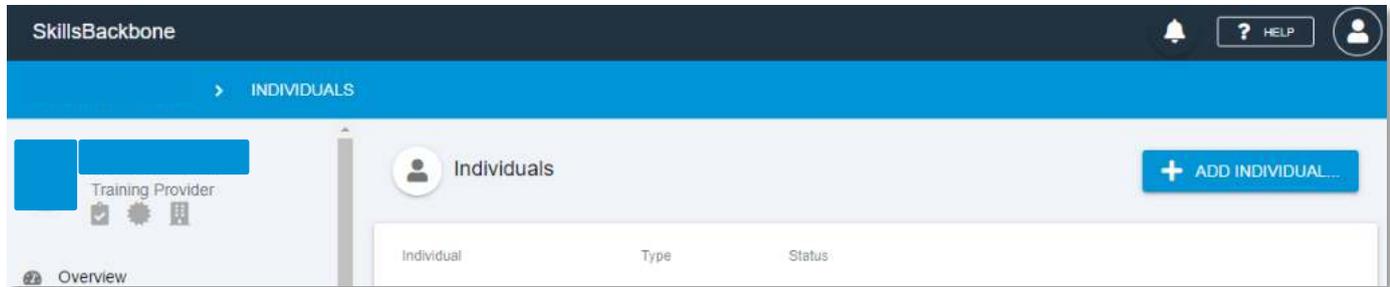
Individual	Type	Status	Actions
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE
[Redacted]	Trainer	Active	VIEW CAPABILITIES LEAVE

At the bottom right of the table, it shows 'Records per page: 20' and '1-7 of 7'.

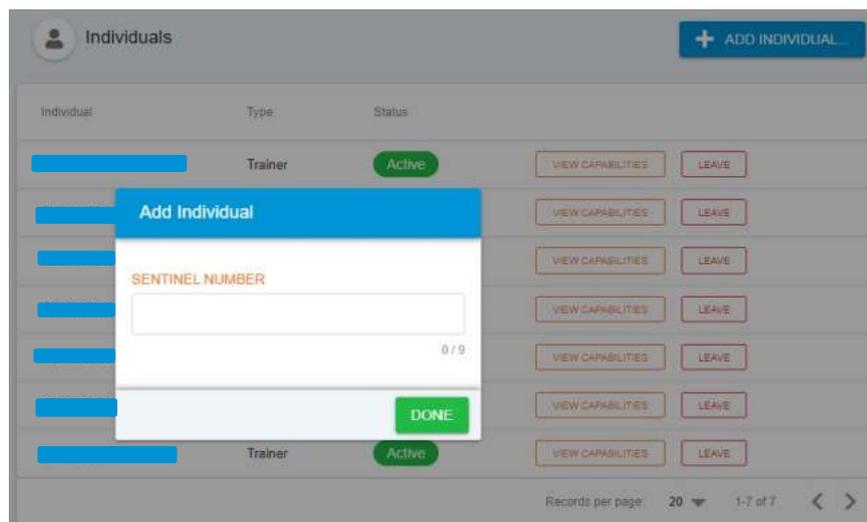
### 6.1. Transferring an Individual

To transfer and trainer/assessor to you as a provider use the **+ADD INDIVIDUAL** button.

***Note: this can only be used for already Assured Trainer/Assessors – if the individual is not already Assured they must register and apply.***



The system will ask you for the individuals Sentinel Number. Type in the Sentinel number and hit **DONE**



You will then be taken to the Joiners screen where you upload the required evidence to submit to NSAR. The guidance notes on this screen will change as and when the requirements change and therefore the below screen may contain different evidence requirements over time. On the right-hand side of the screen, a timeline of activity relating to the movement request is captured.

SkillsBackbone

ADD INDIVIDUAL

Training Provider

In progress For review

JOINER NAME

EVIDENCE

1. Declaration and signature from current Appendix 2 (trainer/assessor signature required)
2. Provider headed letter of support including a list of competencies that the Provider intends the joiner to deliver, signed and dated by the Training Manager.
3. Trainer/Assessor Personal Statement which must include detail of occupational competence held  
N.B. Where the transferring trainer/assessor holds capabilities in addition to the provider's capabilities, a separate application to request an additional provider capability is required once the trainer/assessor transfer has been completed before training/assessment can be completed.
4. Job Description and evidence of the post holders acceptance of their responsibilities
5. Evidence of Induction

Click or drag files to upload

No files uploaded

COMMENT

0 / 1000

CANCEL REQUEST SUBMIT FOR REVIEW

Joiner Movement Activity

1 MAR 2022 - 08:28  
 Status changed to In Progress  
 Updated by

The name of the joiner is populated automatically from the Sentinel Number provided. You must upload the evidence detailed and **SUBMIT FOR REVIEW**.

The system will not allow you to submit without evidence uploaded.

**JOINER NAME**  
[Redacted]

**EVIDENCE**

1. Declaration and signature from current Appendix 2 trainer/assessor (signature required)
2. Provider headed letter of support including a list of competencies that the Provider intends the joiner to deliver, signed and dated by the Training Manager.
3. Trainer/Assessor Personal Statement which must include detail of occupational competence held  
N.B. Where the transferring trainer/assessor holds capabilities in addition to the provider's capabilities, a separate application to request an additional provider capability is required once the trainer/assessor transfer has been completed before training/assessment can be completed.
4. Job Description and evidence of the post holders acceptance of their responsibilities
5. Evidence of Induction

Click or drag files to upload

No files uploaded

This field cannot have less than 1 files

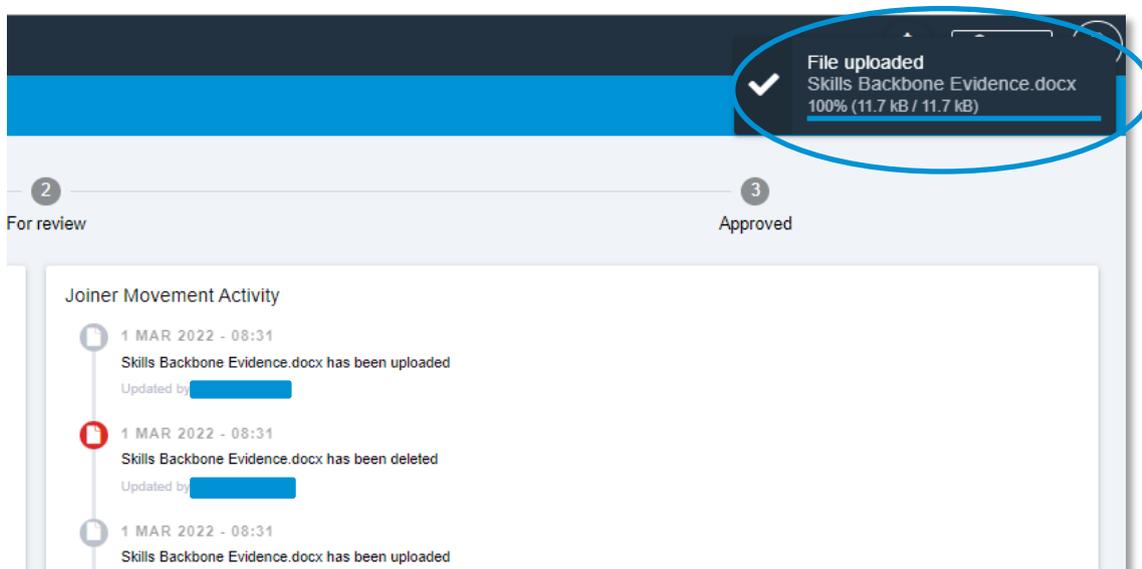
**COMMENT**

[Rich text editor with icons: Bold, Italic, Underline, List, Indent, Outdent, Undo, Redo]

0 / 1000

**CANCEL REQUEST** **SUBMIT FOR REVIEW**

In the same way as earlier described, you can drag files to upload or Click, search and open in to the dotted line area of the screen and, as before, the file upload will be confirmed in an alert which will disappear after a few seconds



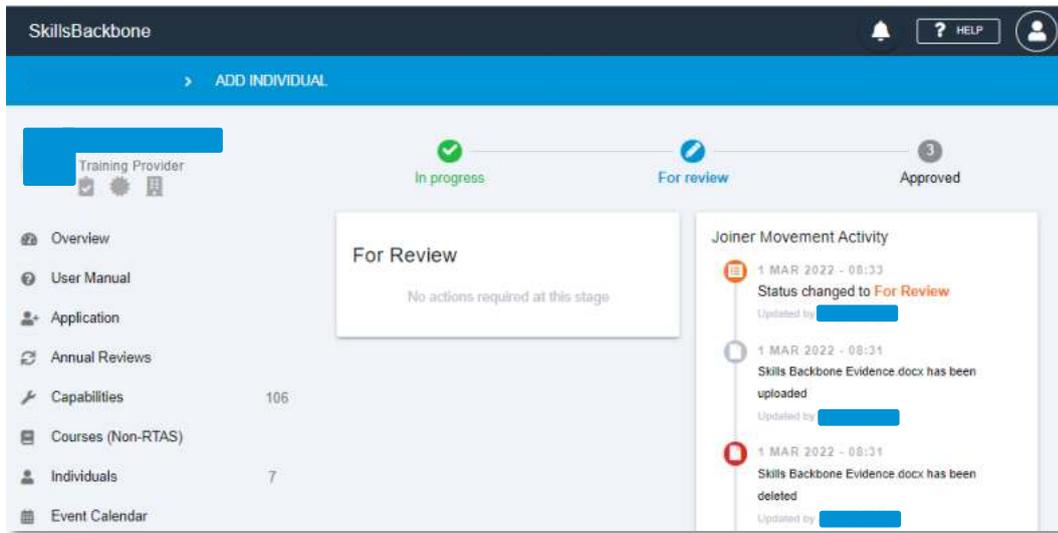
**File uploaded**  
 Skills Backbone Evidence.docx  
 100% (11.7 kB / 11.7 kB)

2 For review      3 Approved

**Joiner Movement Activity**

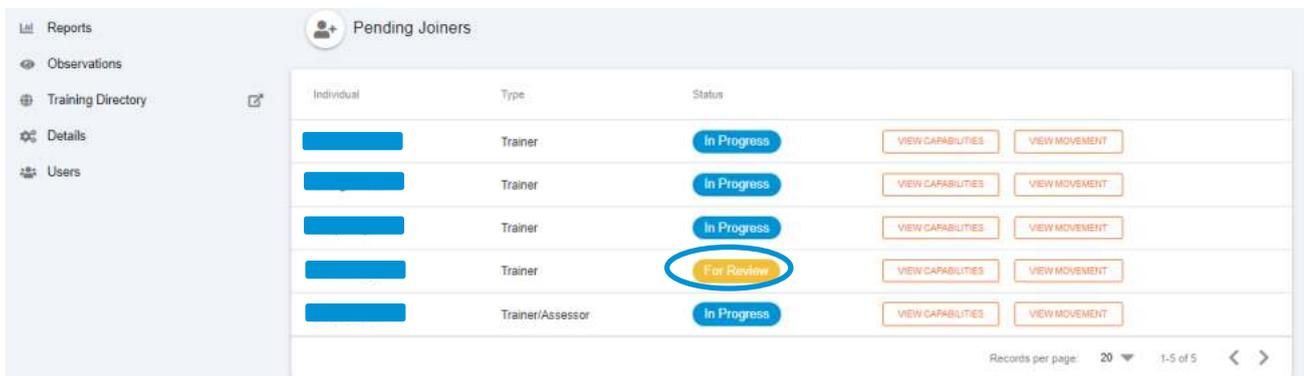
- 1 MAR 2022 - 08:31 Skills Backbone Evidence.docx has been uploaded  
Updated by [Redacted]
- 1 MAR 2022 - 08:31 Skills Backbone Evidence.docx has been deleted  
Updated by [Redacted]
- 1 MAR 2022 - 08:31 Skills Backbone Evidence.docx has been uploaded

Once there are files uploaded you can **SUBMIT FOR REVIEW**. The system will confirm this in the following screen and associated timeline captures all actions taken.



The request has now been submitted to NSAR for approval.

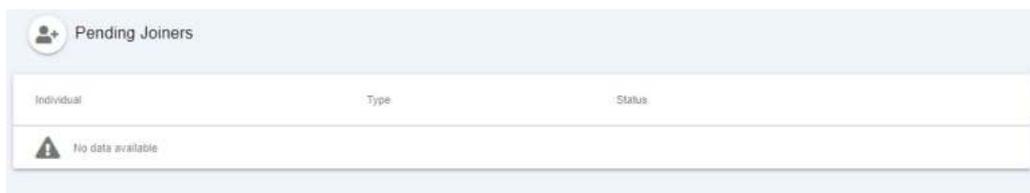
When you return to the Individuals page you will see that this joiner now appears in your Pending Joiners section of the page.



Once NSAR takes action, you will see the following:

**Approved** transfer:

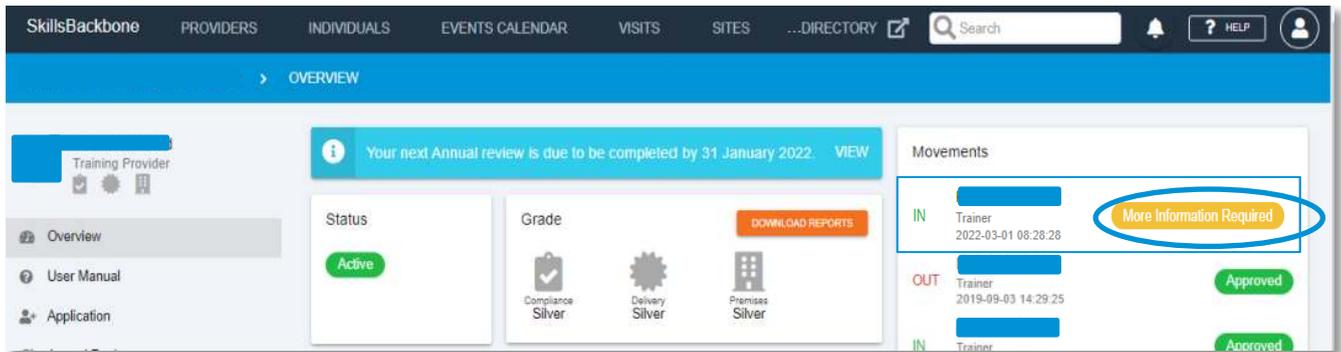
The trainer will appear in your list of Individuals and has disappeared from your Pending Joiners Section of the page.



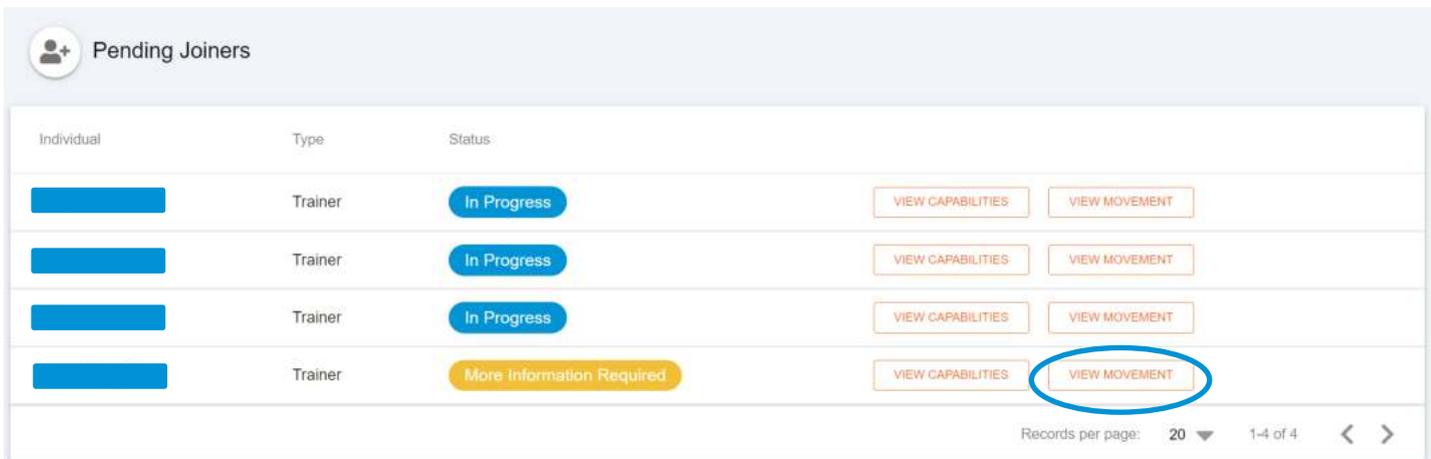
**More Information Required:**

Before transfer can be processed, the trainer will appear in your Pending Joiners section of the page for you to take action.

You will also see this on your Overview page on the right-hand side of the screen.

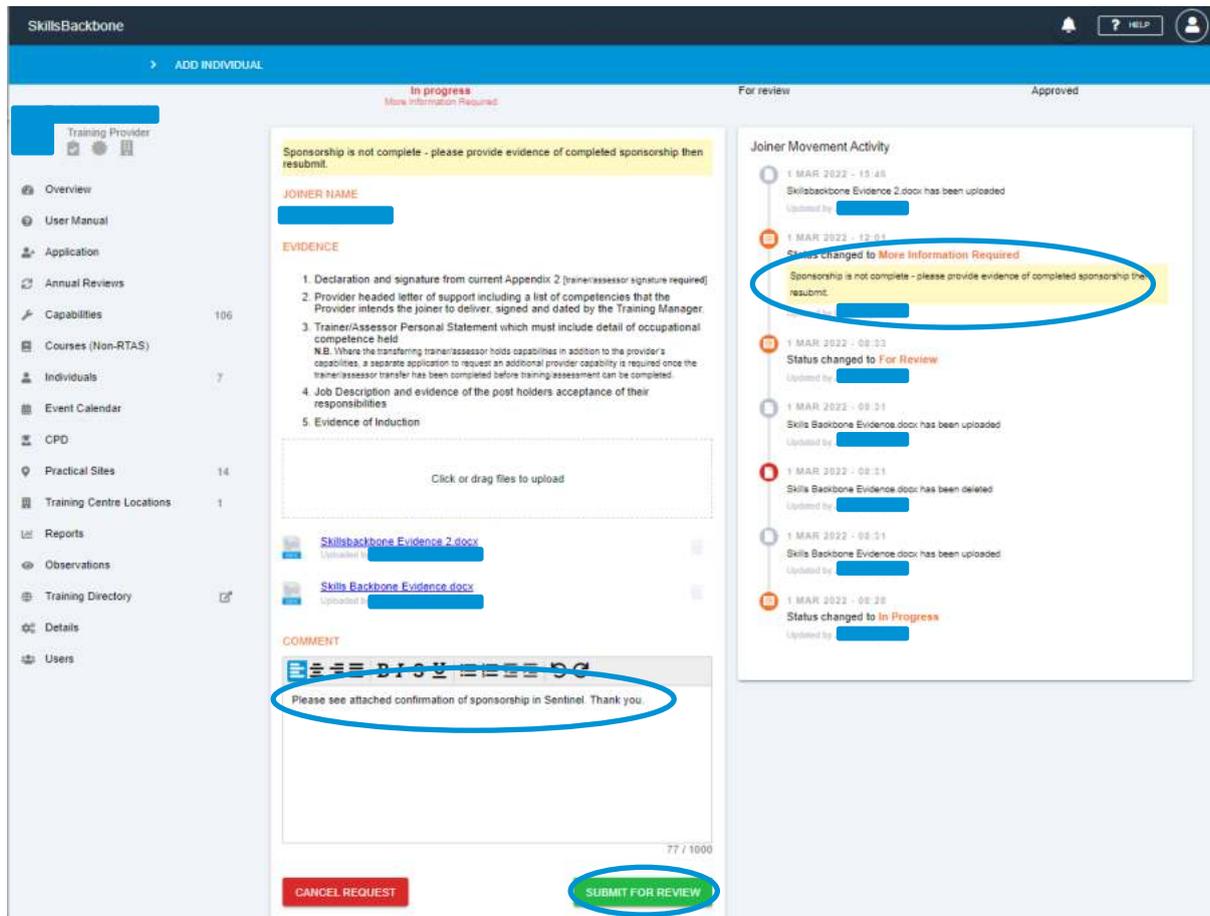


To see the detail of why the request needs further action, click on the **VIEW MOVEMENT** button.

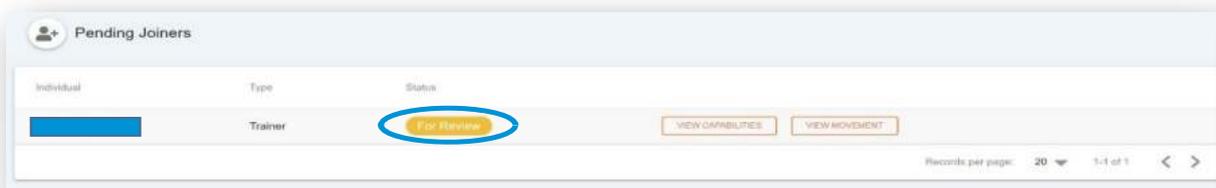


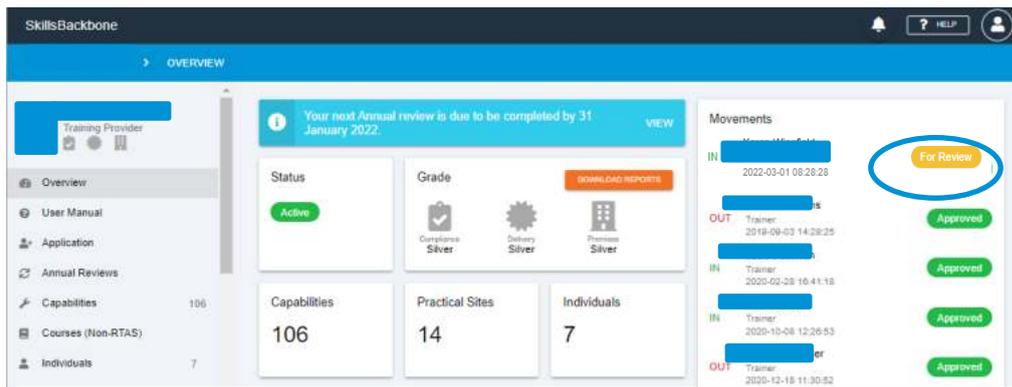
This takes you to the detail of the movement to take the necessary action required. The notes that the QA Team have added advise what the issue is, will be shown in the movement activity bar on the right-hand side of the screen and repeated at the top of the screen for easy view of the NSAR QA response.

You are able to upload files and add return comments. When you are finished, hit **SUBMIT FOR REVIEW** again.



You will then see that the Pending Joiner shows that it has been submitted for Review. The Overview will also show the below.

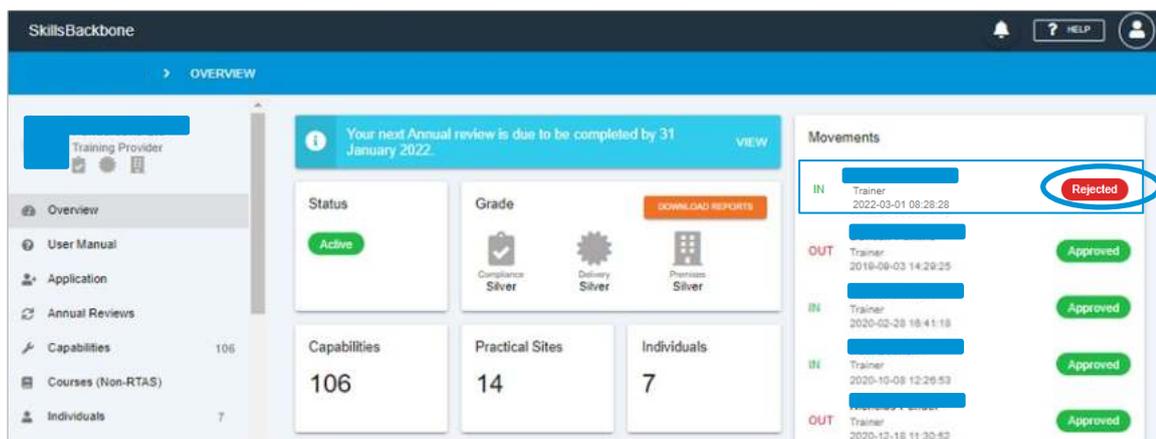




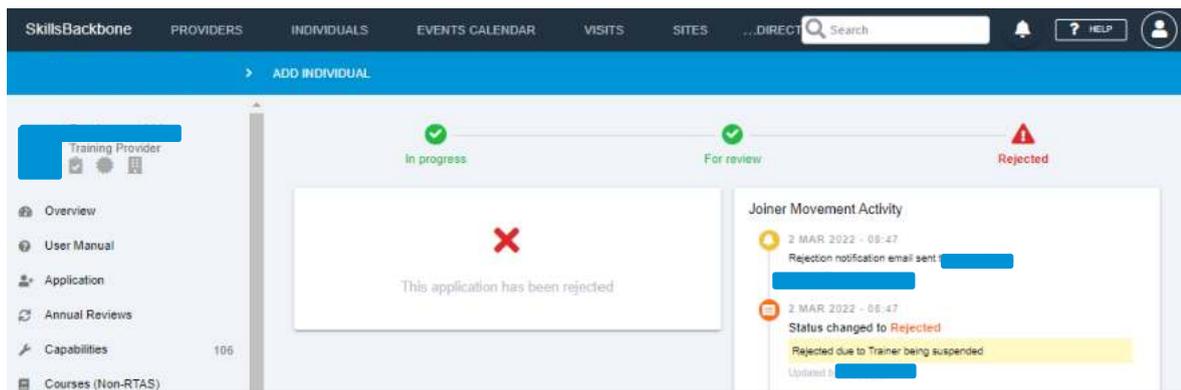
If the transfer is approved, you will see the above already outlined for approved transfer. See below for what is seen when a transfer is rejected.

**Rejected** transfer:

When a request has been rejected, they will disappear from your Pending Joiners Section of the page but will appear on the Overview page. You can see any rejections on the Overview page.



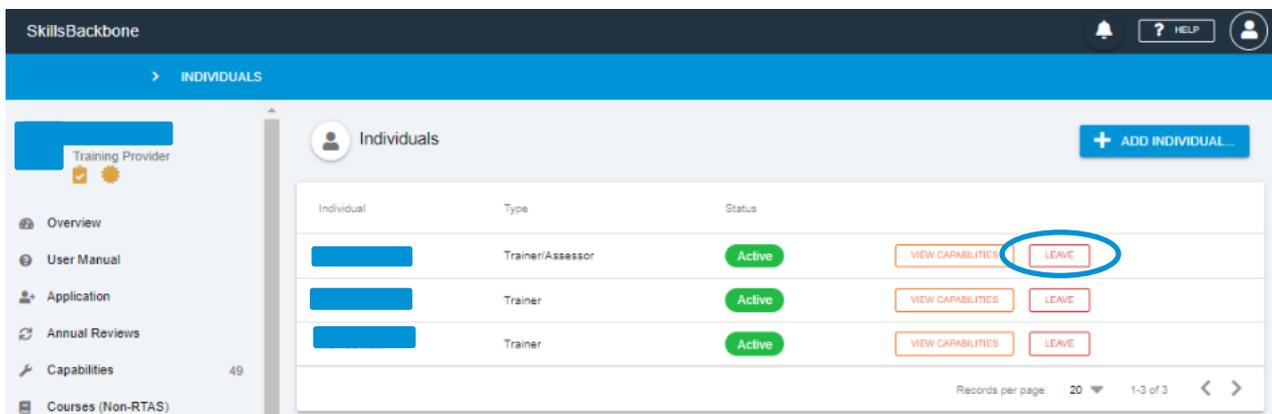
To see the reason for the rejection, click on the **REJECTED** icon on the overview.



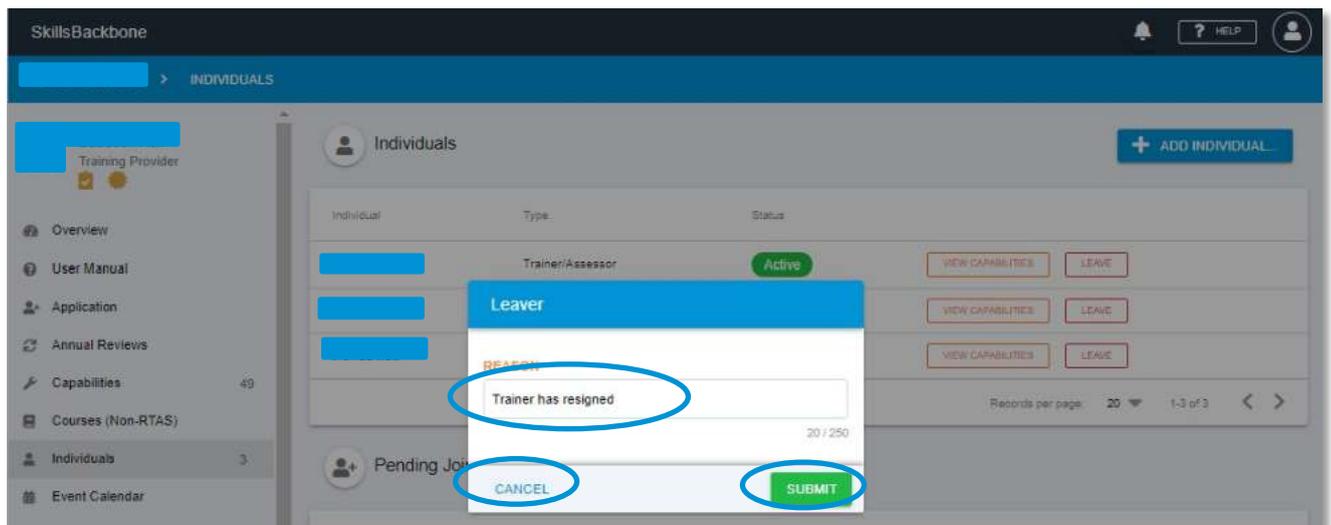
You are then required to take the action advised in the comments and reapply as a **new** trainer movement.

## 6.2. Deactivating an individual

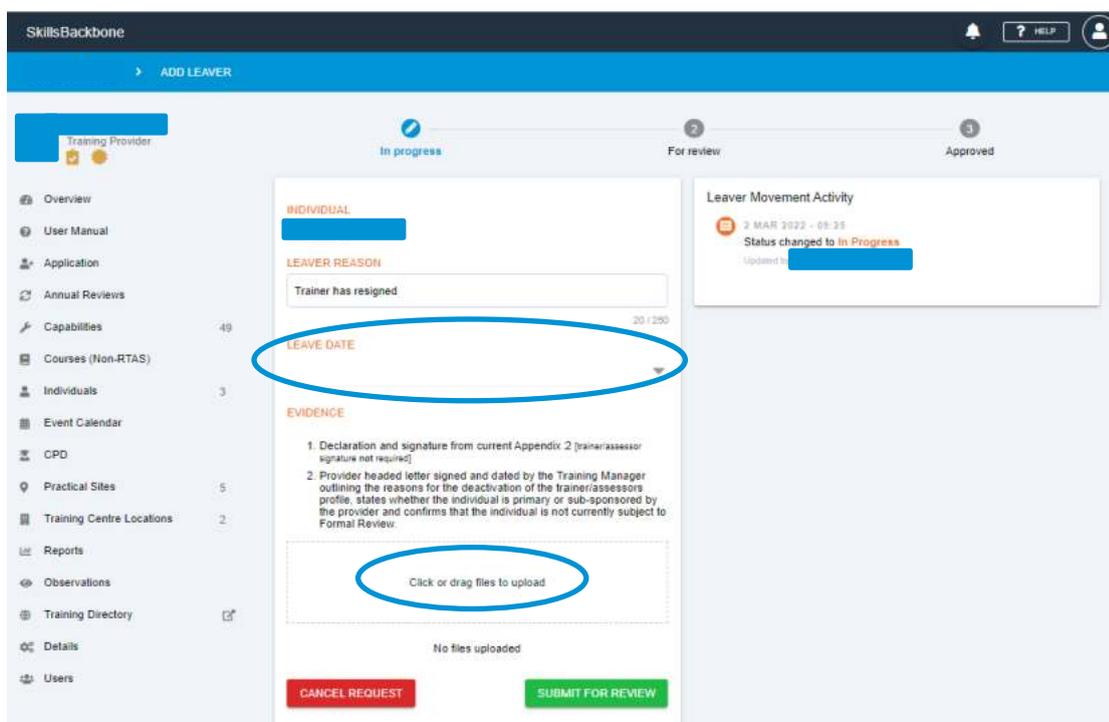
To deactivate an individual go to the trainer list on the individuals page and click the **LEAVE** icon.



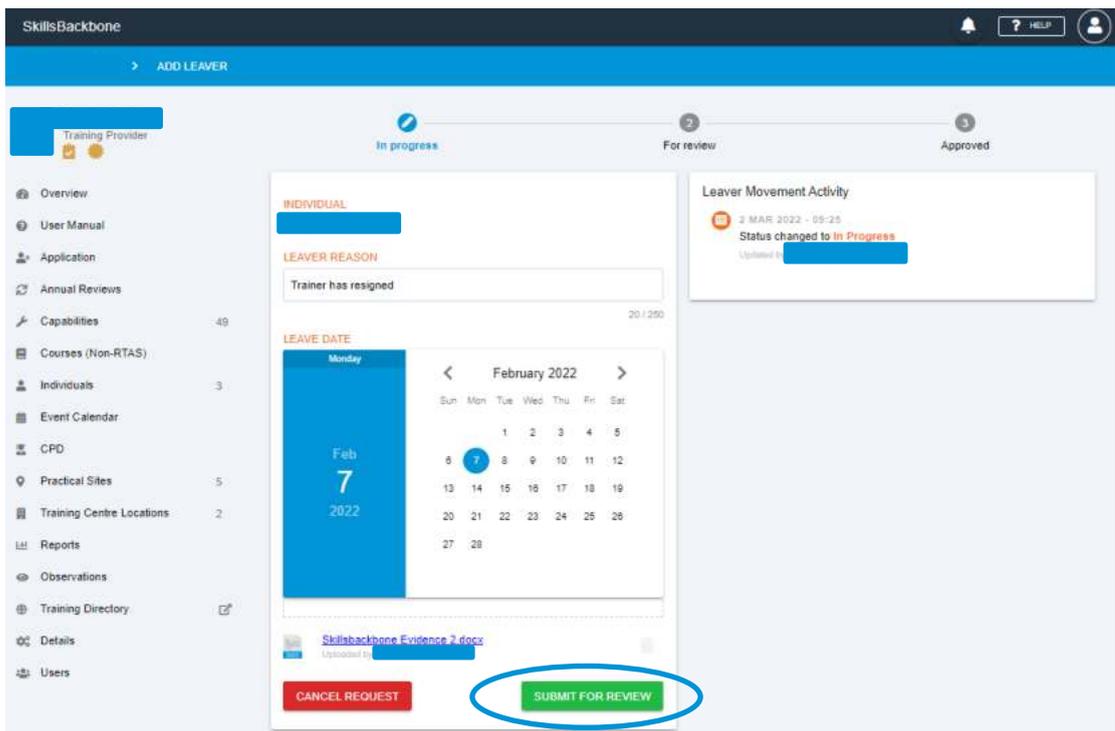
The system then asks you to provide the reason for the deactivation. Enter the comments which apply. Note if you select **LEAVE** in error you can **CANCEL** the action.



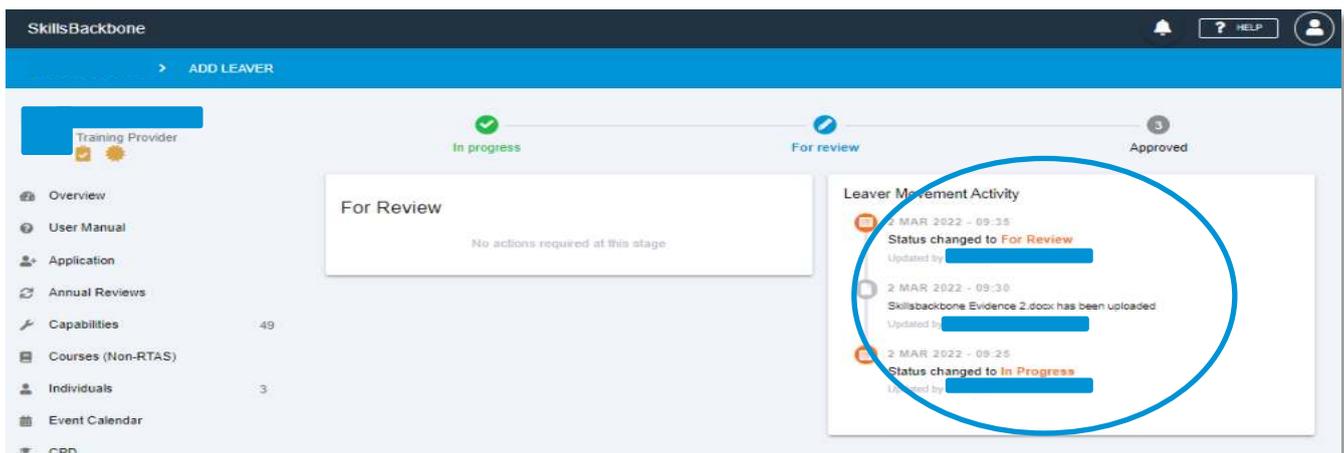
After hitting **SUBMIT** the system will ask for a leave date, which can be in the future, and upload of the required evidence.



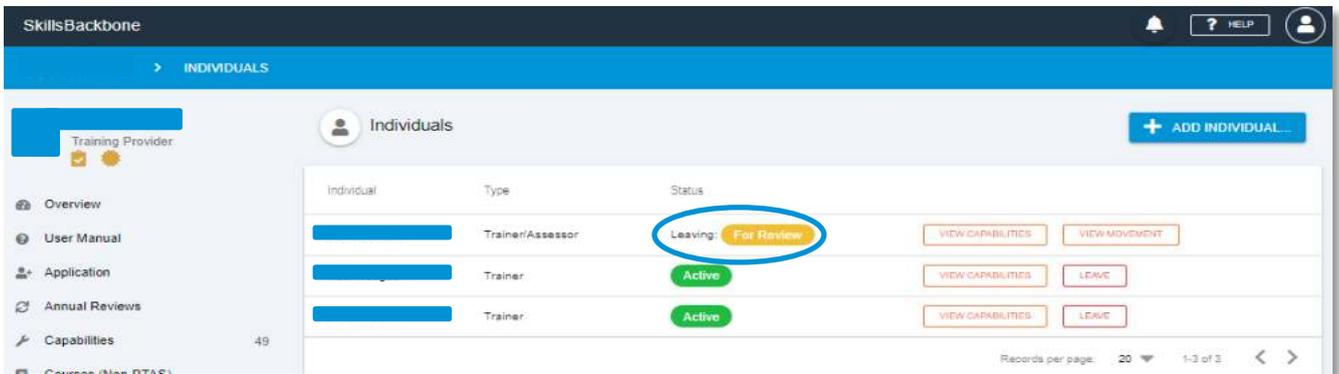
Add the leave date using the pop-up calendar and upload the evidence in the same way as described in previous sections, by dragging in files or clicking, finding and opening the files required.



Once the files have been uploaded you can **SUBMIT FOR REVIEW**. The system will then confirm the status change by both message on screen and in the activity timeline on the right-hand side of the screen. The request has been submitted to NSAR for processing.



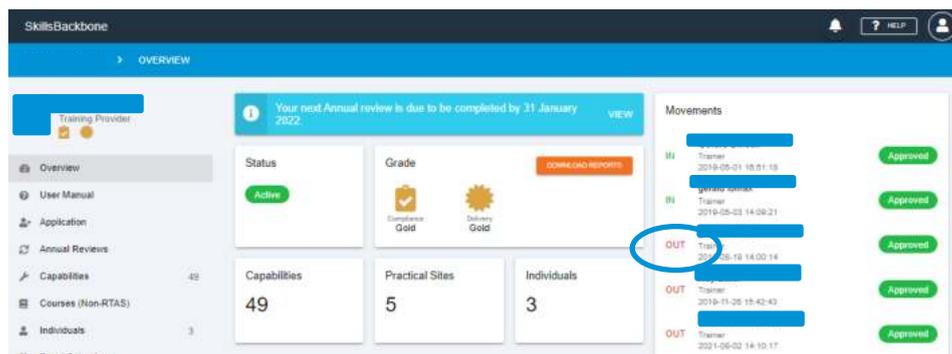
You will see that the trainer is marked as 'Leaving' and 'For Review' in your trainer list.



Once NSAR takes action, you will see the following:

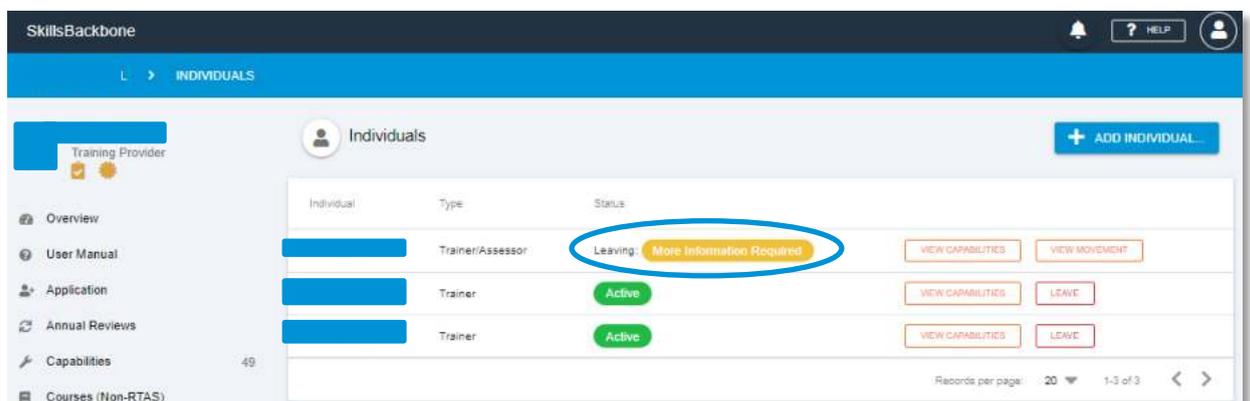
**Approved** transfer:

The trainer will have disappeared from your trainer list in the Individuals section and is recorded in the Overview as an **'OUT'** activity.

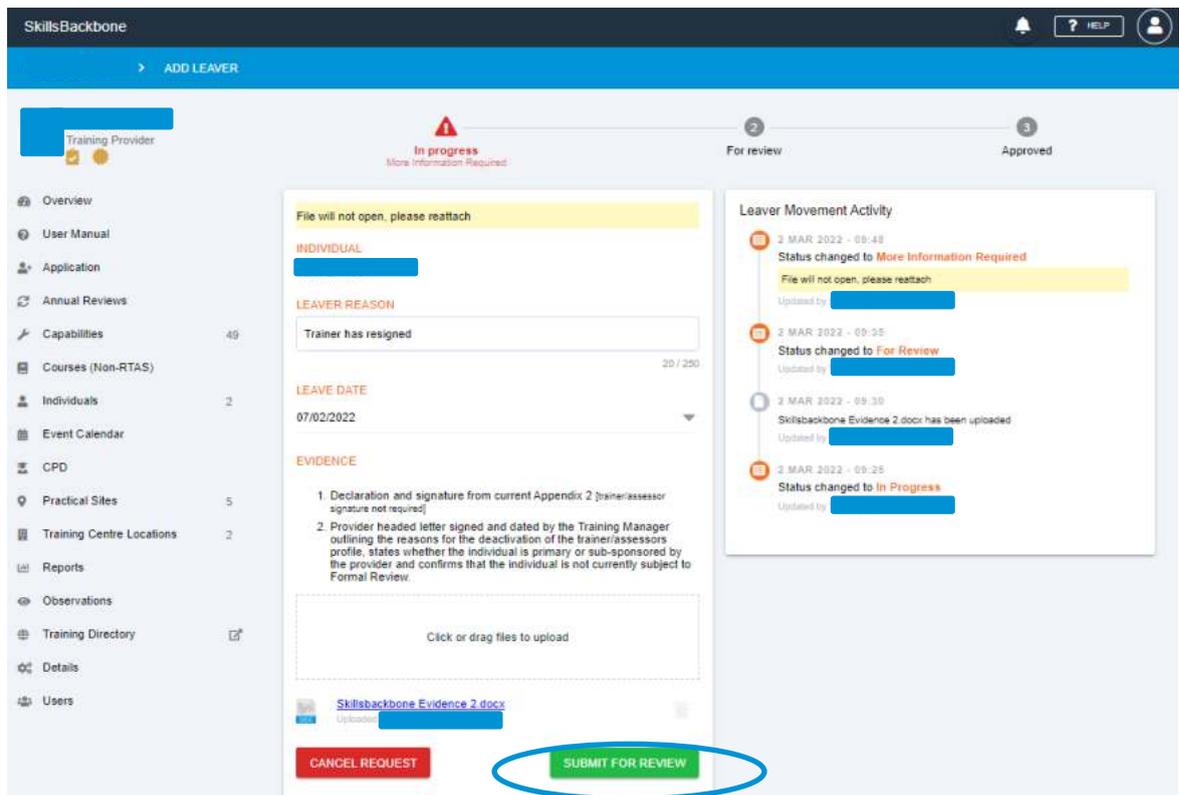


**More Information Required** before the deactivation can be processed

The individual will appear on the approved list as **'More Information Required'**. To see the notes of what information is required and take action press the **VIEW MOVEMENT** button.



The system will take you back to the initial application screen to read the comment and take the required action.

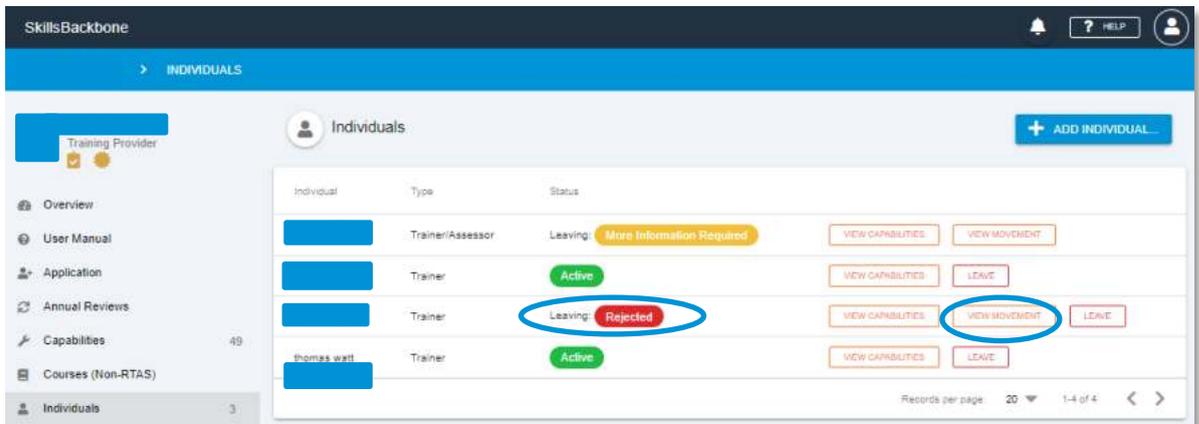


Once you have completed the actions required, you can **SUBMIT FOR REVIEW** again. As above the system will then confirm the status change by both message on screen and in the activity timeline on the right-hand side of the screen. The request has been resubmitted to NSAR for processing.

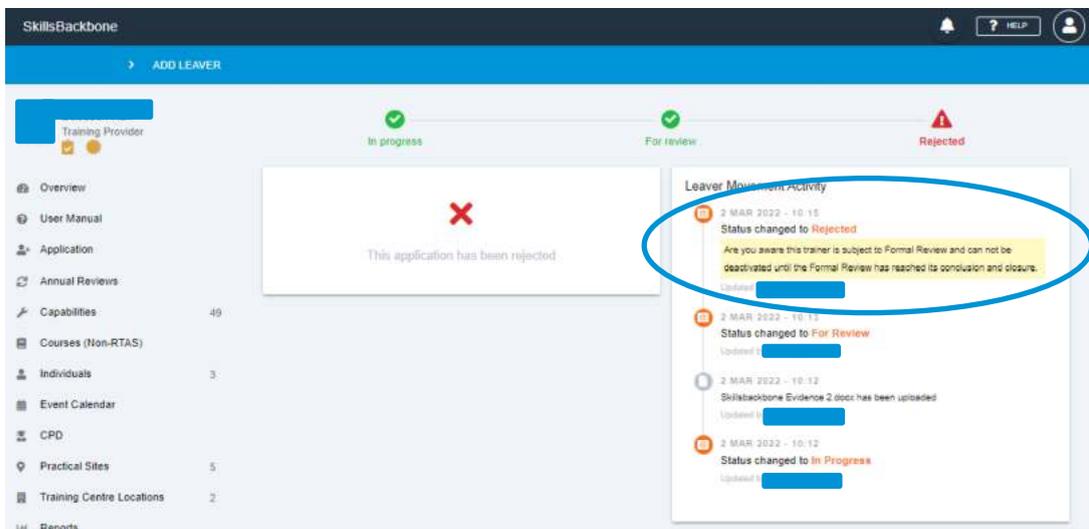
**Rejected** transfer:

When a request has been rejected, the trainer will be shown on the list as still approved and that the leave request was **Rejected**.

To see the reason for the rejection, select **VIEW MOVEMENT**. The reason will appear within the Movement Activity bar.



The system will then show you the rejection screen with the comments for the rejection appearing in the movement activity timeline on the right-hand side of the screen. You can not resubmit a rejected request and will be required to repeat the **LEAVE** process.



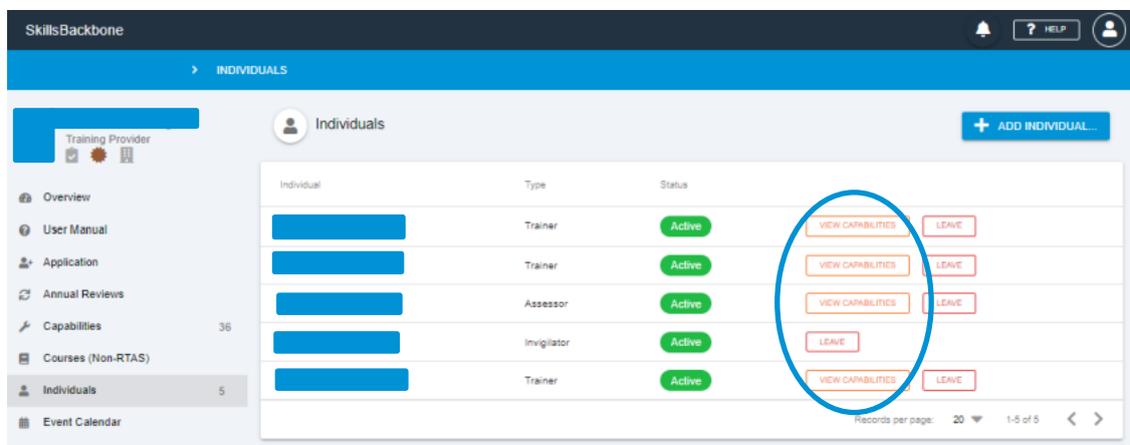
## 6.3. Individual's Capabilities

### 6.3.1. Viewing Capabilities

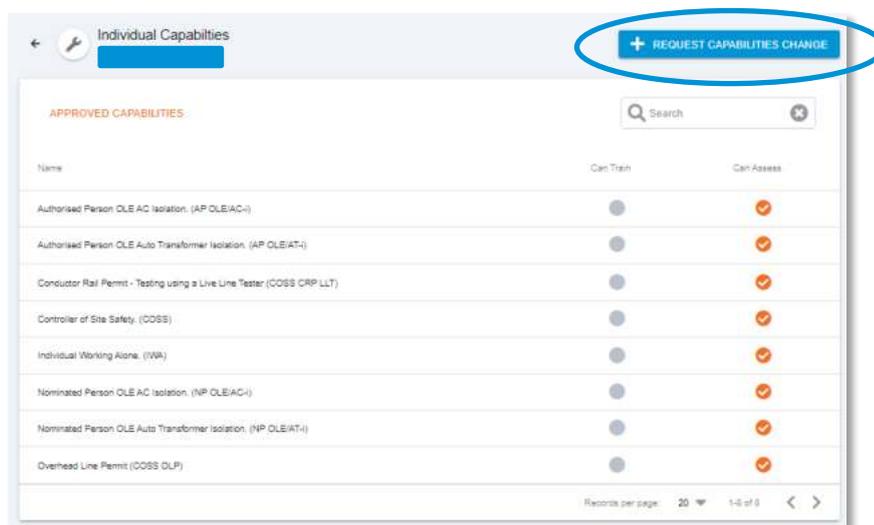
The system enables providers to view the capabilities which individuals are approved to deliver including whether the individual can train, assess or train and assess. This list should match Sentinel.

**Note: All Providers must ensure that individuals capability lists are kept up to date to allow maintaining accuracy of capabilities in Sentinel.**

Individual's capabilities can be viewed by the **VIEW CAPABILITIES** button.



When selected the system presents the capabilities that the individual holds and at what level.



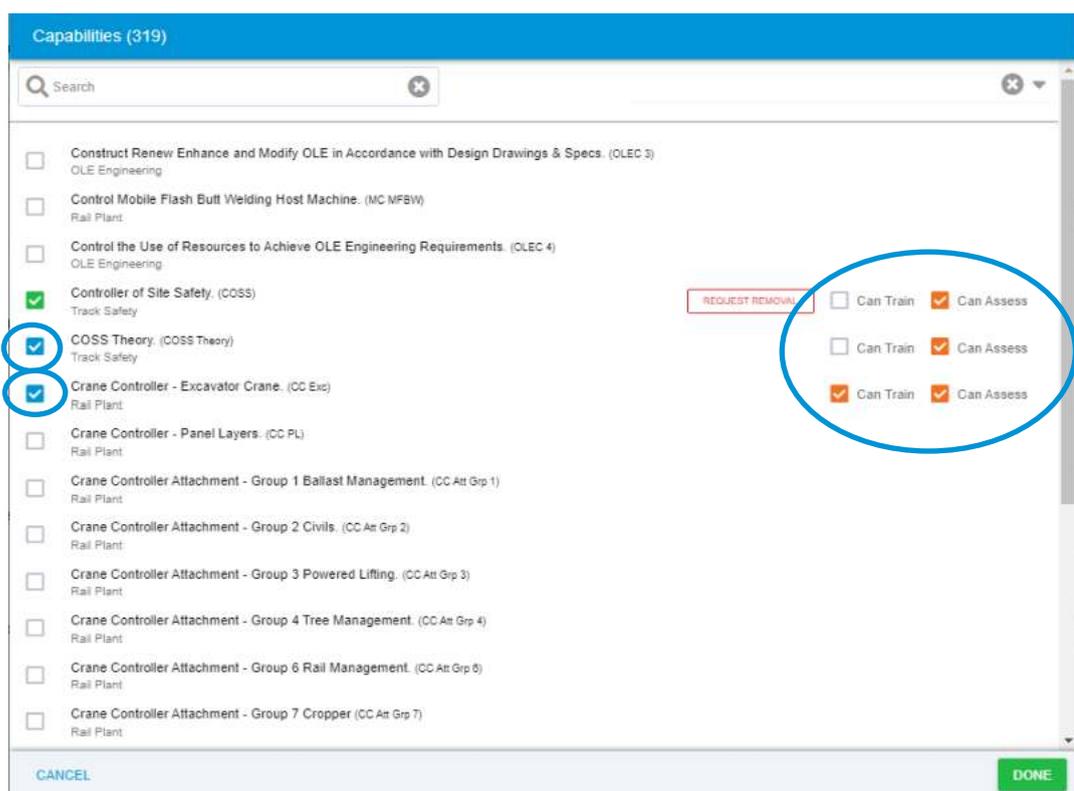
The addition, removal or amendment of individual capabilities is managed through this individual screen by using the **REQUEST CAPABILITIES CHANGE** button at the top right-hand corner of the screen.

This opens the capabilities window which details what is held and where amendments can be made to either train/assess or request new capabilities or request the removal, whichever is relevant.

### 6.3.2. Requesting new Capabilities



This then opens a capabilities edit window to choose the new capability that is being requested. Find what you want to add and tick the box.

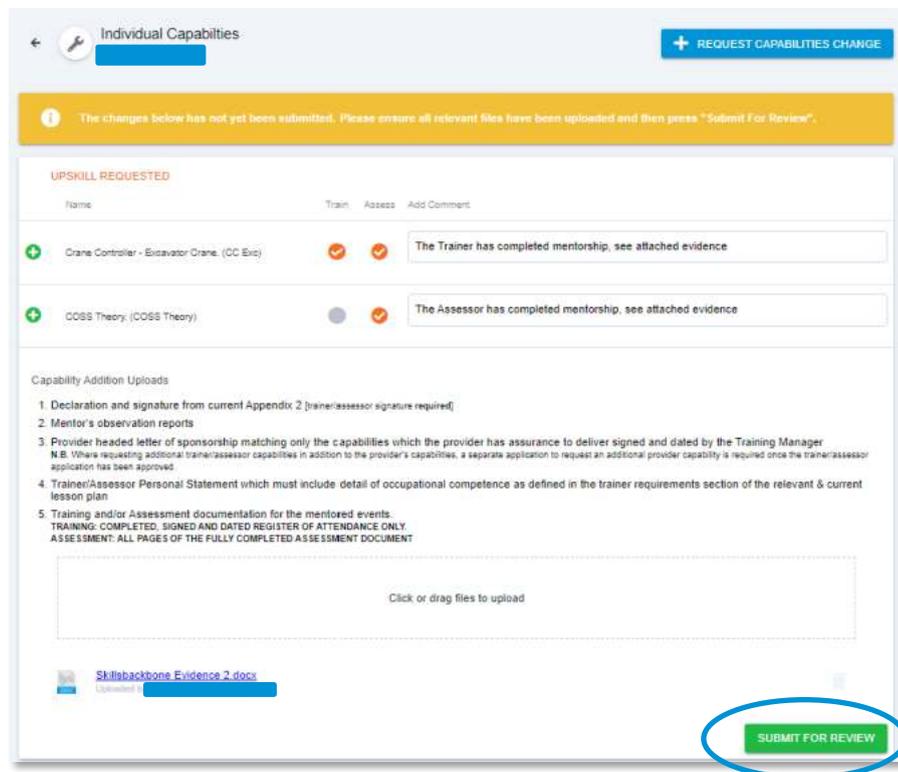


Note the change in colour from **green** [existing] to **blue** [requested]. When you select the competence being applied for this also needs confirmation of the level i.e. train, assess or train/assess. The system defaults to both but if only one is required then simply untick what is not wanted and press **DONE**.

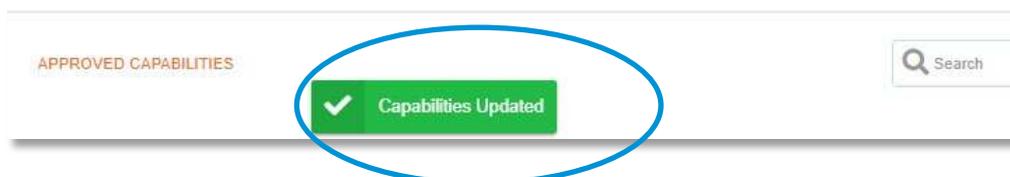


Pressing **CANCEL** will close the window and no changes will be made or submitted for review.

The system then takes you to a page to confirm your request and upload the evidence required to support the new capability request and allows the addition of notes to accompany the submission. Addition of files works in the same way as already outlined for uploading documents earlier in this manual. When finished hit **SUBMIT FOR REVIEW**



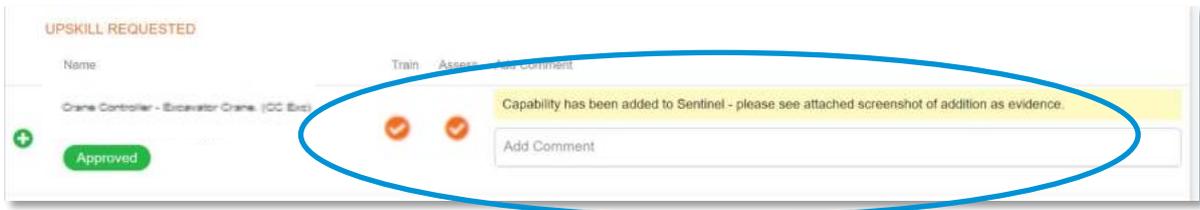
The system will confirm it has been updated with a pop up message at the bottom of the screen. This means that your request for an additional capability has been sent to NSAR QA for processing.



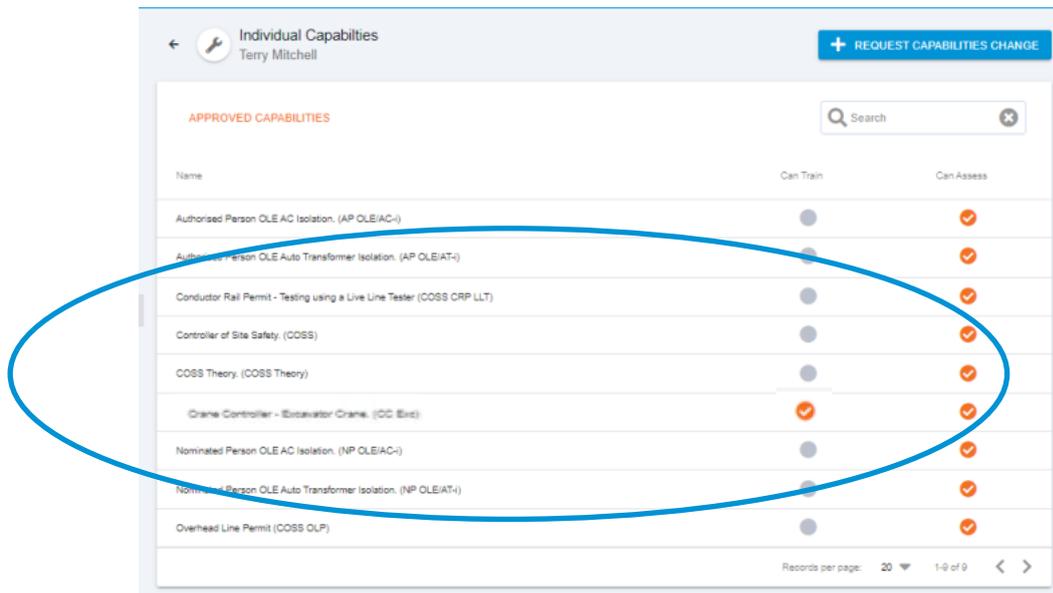
NSAR must approve your request before the Trainer/Assessor can conduct any events using the requested capabilities.

When NSAR has taken action you will see:

**Approved** upskill request: The notes that NSAR QA has added are easily seen.

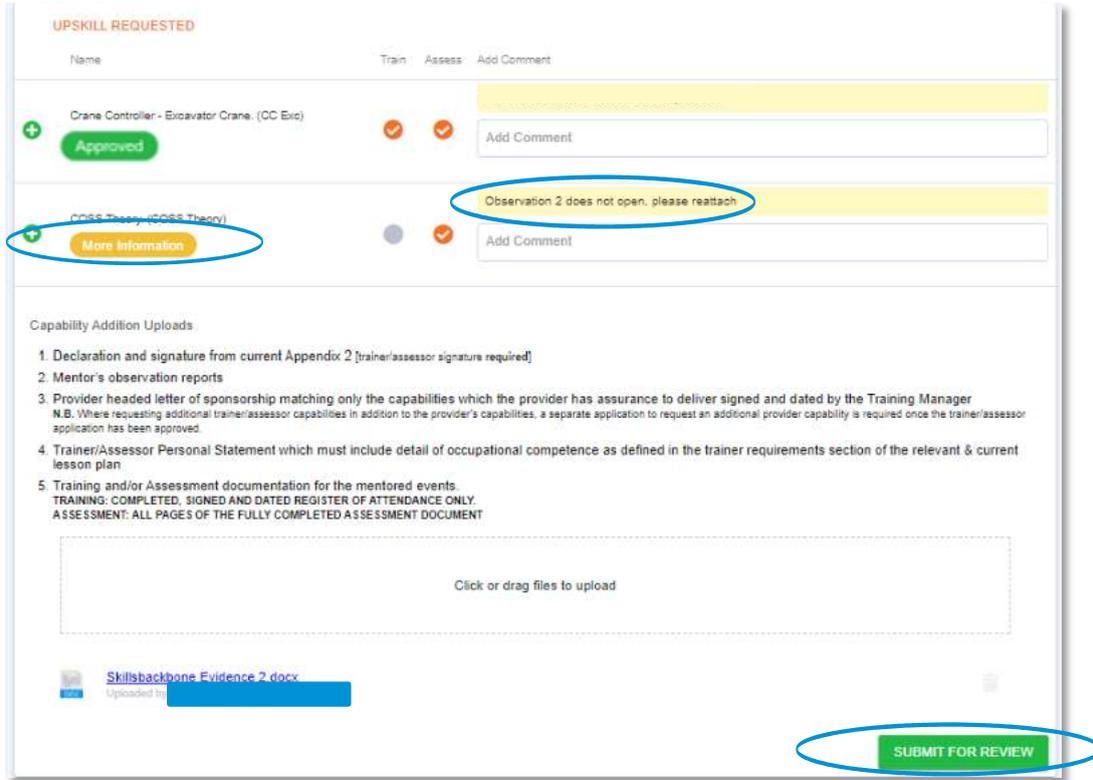


Below the form area you will see the additional capability within the list.



**More Information** upskill request:

The notes that NSAR QA has added are easily seen



**UPSKILL REQUESTED**

Name	Train	Assess	Add Comment
Crane Controller - Excavator Crane. (CC Exc)	✓	✓	Approved
CCSS Theory (CCSS Theory)	●	✓	More Information Observation 2 does not open, please reattach

Capability Addition Uploads

1. Declaration and signature from current Appendix 2 (trainer/assessor signature required)
2. Mentor's observation reports
3. Provider headed letter of sponsorship matching only the capabilities which the provider has assurance to deliver signed and dated by the Training Manager  
N.B. Where requesting additional trainer/assessor capabilities in addition to the provider's capabilities, a separate application to request an additional provider capability is required once the trainer/assessor application has been approved.
4. Trainer/Assessor Personal Statement which must include detail of occupational competence as defined in the trainer requirements section of the relevant & current lesson plan
5. Training and/or Assessment documentation for the mentored events.  
TRAINING: COMPLETED, SIGNED AND DATED REGISTER OF ATTENDANCE ONLY.  
ASSESSMENT: ALL PAGES OF THE FULLY COMPLETED ASSESSMENT DOCUMENT

Click or drag files to upload

Skillsbackbone Evidence 2.docx  
Uploaded to [redacted]

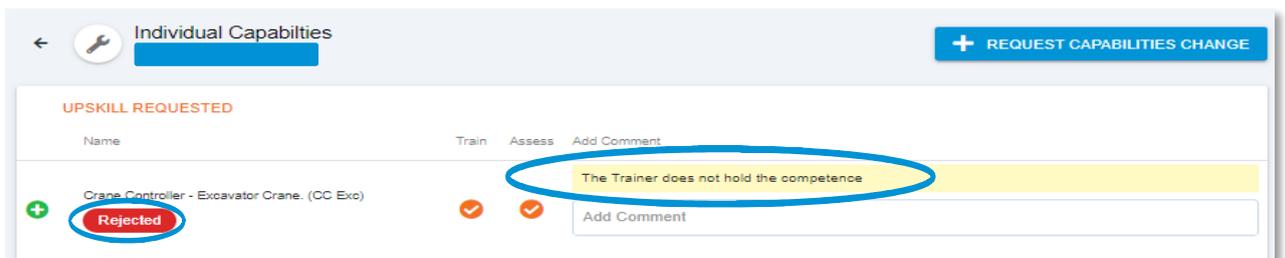
**SUBMIT FOR REVIEW**

To act, add the required comment and amend any uploads required and **SUBMIT FOR REVIEW** again. This will then be sent to NSAR QA again for their review and action.

If approved it will appear as the **Approved** upskill detailed above. See below for what you will see if it is **Rejected**.

**Rejected** upskill request: The notes that NSAR QA has added are easily seen and the **Rejected** icon is displayed.

The capability will not appear on the overall list of capabilities seen beneath the form submission area of the screen.



← Individual Capabilities **+ REQUEST CAPABILITIES CHANGE**

**UPSKILL REQUESTED**

Name	Train	Assess	Add Comment
Crane Controller - Excavator Crane. (CC Exc)	✓	✓	Rejected The Trainer does not hold the competence

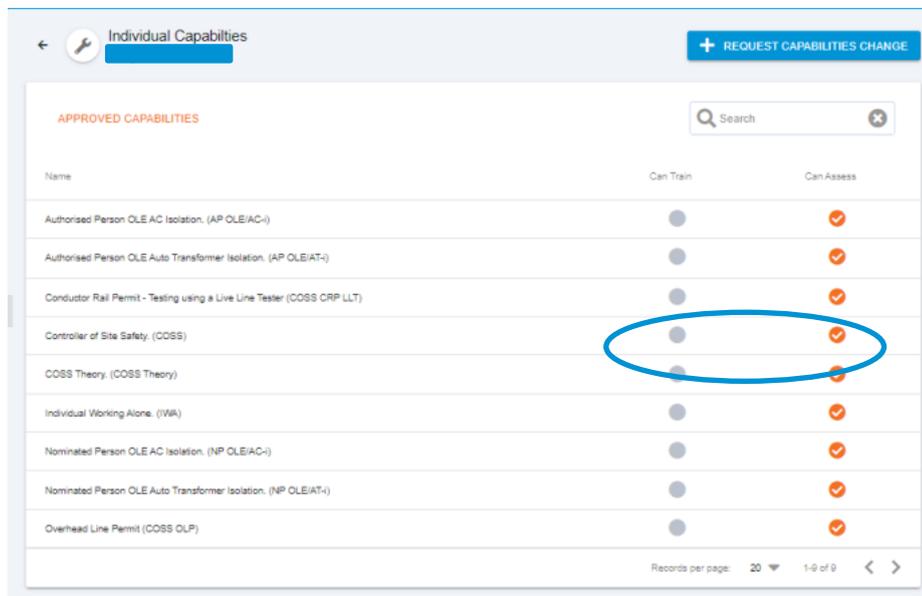
To return to the main list of capabilities press the back arrow at the top left of the change request window. This will return you to the approved capabilities list for the trainer/assessor.

### 6.3.3. Editing current Capabilities

Editing an existing capability to add train or assess as required is completed in the same way as requesting a brand-new capability.

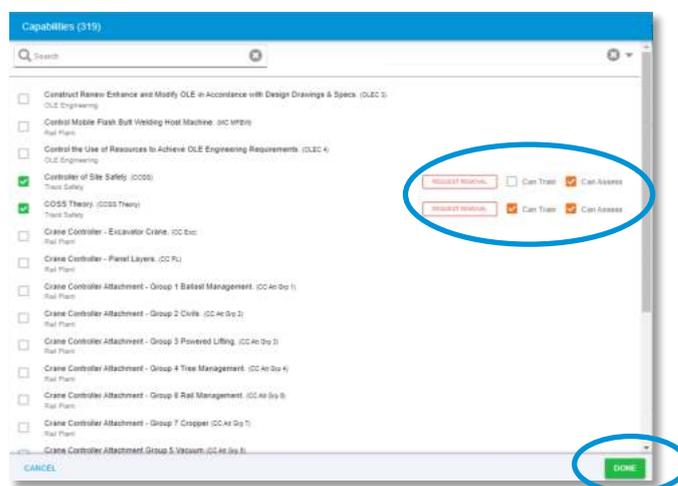


Earlier the Trainer/Assessor was awarded Assessor capability only.

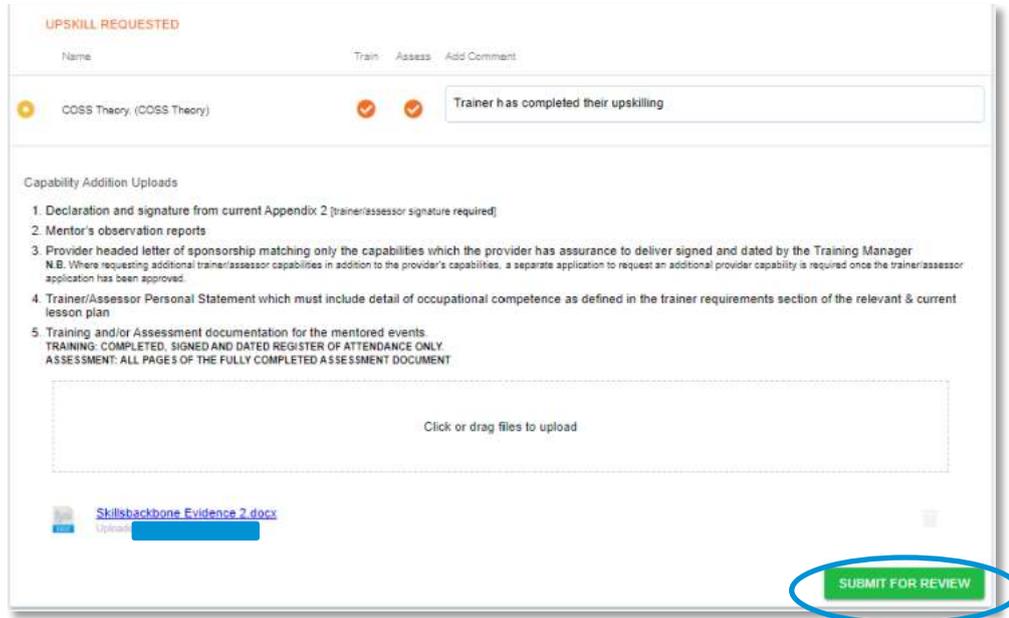


Name	Can Train	Can Assess
Authorised Person OLE AC Isolation. (AP OLE/AC-I)	<input type="radio"/>	<input checked="" type="checkbox"/>
Authorised Person OLE Auto Transformer Isolation. (AP OLE/AT-I)	<input type="radio"/>	<input checked="" type="checkbox"/>
Conductor Rail Permit - Testing using a Live Line Tester (COSS CRP LLT)	<input type="radio"/>	<input checked="" type="checkbox"/>
Controller of Site Safety. (COSS)	<input type="radio"/>	<input checked="" type="checkbox"/>
COSS Theory. (COSS Theory)	<input type="radio"/>	<input checked="" type="checkbox"/>
Individual Working Alone. (IWA)	<input type="radio"/>	<input checked="" type="checkbox"/>
Nominated Person OLE AC Isolation. (NP OLE/AC-I)	<input type="radio"/>	<input checked="" type="checkbox"/>
Nominated Person OLE Auto Transformer Isolation. (NP OLE/AT-I)	<input type="radio"/>	<input checked="" type="checkbox"/>
Overhead Line Permit (COSS OLP)	<input type="radio"/>	<input checked="" type="checkbox"/>

To upgrade that to include training also simply tick the 'Can Train' or 'Can Assess' box on the request capabilities screen and click **DONE** when complete.



You are then returned to the change request screen for you to add comments and upload files in the same way as above.



**UPSKILL REQUESTED**

Name: [redacted] Train Assess Add Comment

COSS Theory (COSS Theory) ✓ ✓ Trainer has completed their upskilling

Capability Addition Uploads

1. Declaration and signature from current Appendix 2 (trainer/assessor signature required)
2. Mentor's observation reports
3. Provider headed letter of sponsorship matching only the capabilities which the provider has assurance to deliver signed and dated by the Training Manager  
N.B. Where requesting additional trainer/assessor capabilities in addition to the provider's capabilities, a separate application to request an additional provider capability is required once the trainer/assessor application has been approved.
4. Trainer/Assessor Personal Statement which must include detail of occupational competence as defined in the trainer requirements section of the relevant & current lesson plan
5. Training and/or Assessment documentation for the mentored events.  
TRAINING: COMPLETED, SIGNED AND DATED REGISTER OF ATTENDANCE ONLY  
ASSESSMENT: ALL PAGES OF THE FULLY COMPLETED ASSESSMENT DOCUMENT

Click or drag files to upload

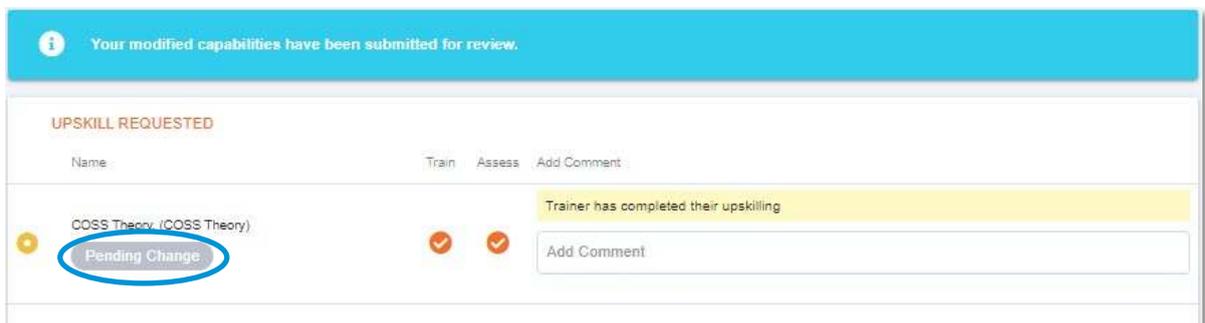
Skillsbackbone Evidence 2.docx

**SUBMIT FOR REVIEW**

NSAR must approve your request. When NSAR has taken action you will see the same screens as in previous sections but instead only for the additional train or assess capability submitted.

During any change request you will see **PENDING CHANGE** against the relevant change request. Once submitted and pending these are a read only condition and cannot be edited.

You also can **not** submit any further capability changes until current changes have been actioned by NSAR.



**Your modified capabilities have been submitted for review.**

**UPSKILL REQUESTED**

Name: [redacted] Train Assess Add Comment

COSS Theory (COSS Theory) Pending Change ✓ ✓ Trainer has completed their upskilling

Add Comment

When submissions are complete the system will then show, against each one, what action you have taken whether this be a change to an existing capability i.e. adding train or assess to it or requesting a new capability.

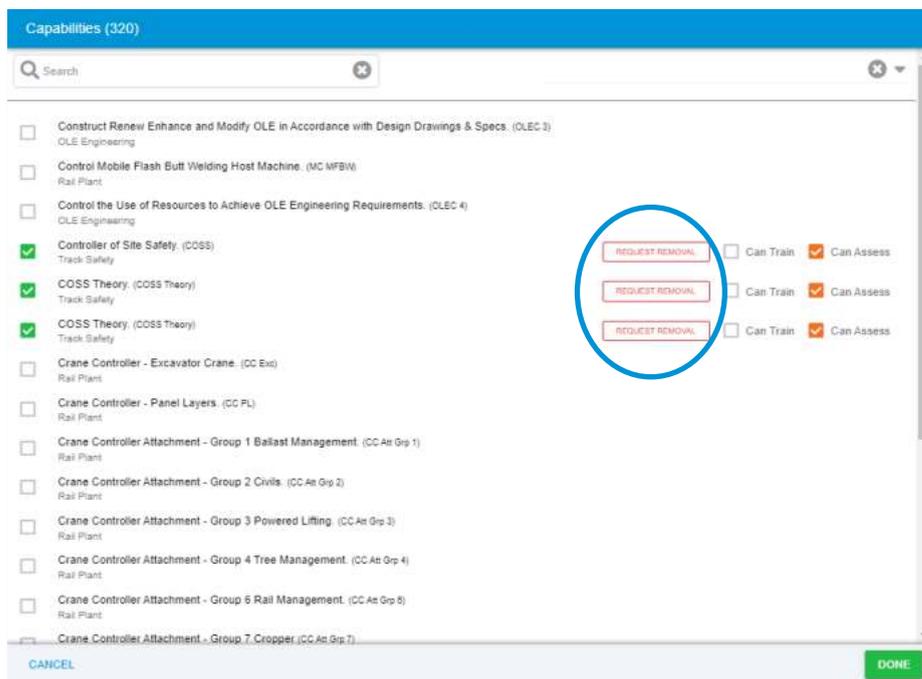
The **approval**, **more information required** and **rejected** actions that can be taken by NSAR will show themselves to you in the same way described above.

### 6.3.4. Removing Capabilities

To remove a capability, use the **REQUEST CAPABILITY CHANGE** button.



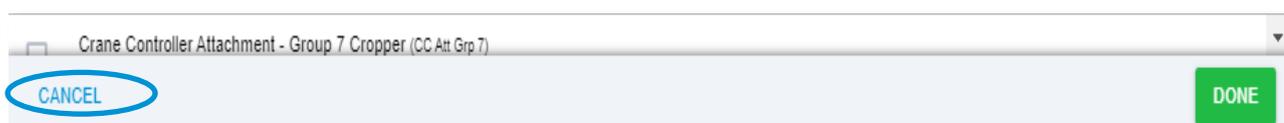
Find the capability that you want to remove from the list and select the **REQUEST REMOVAL** button at the side of the capability that you wish to remove.



Once selected the system will make it clear that a **removal** has been selected.

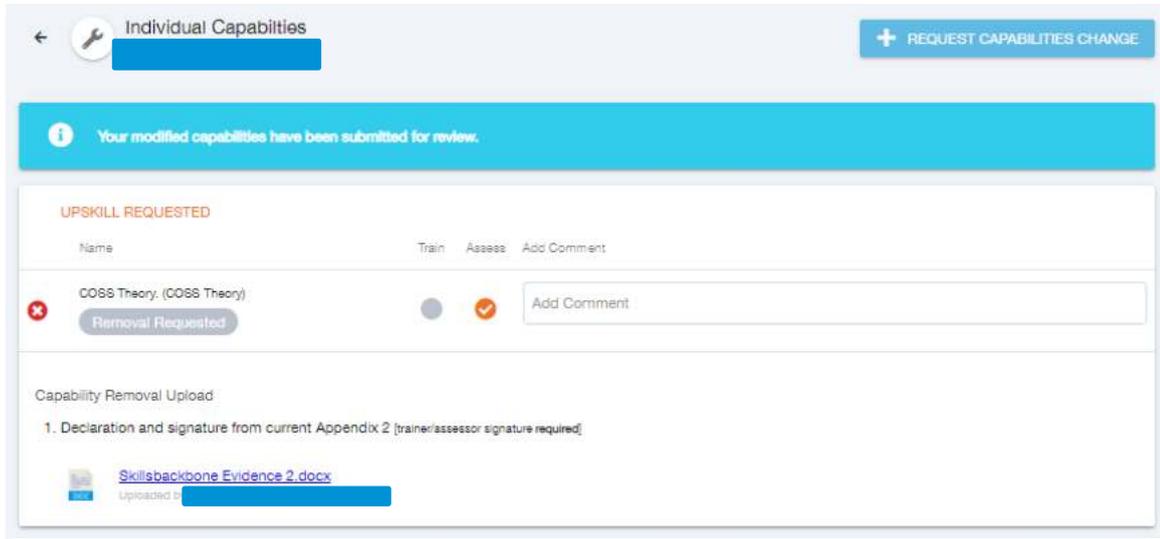


If this was not intended it can be **cancelled** using the button at the bottom of the list.



When you are sure, just click **DONE** which will return you to the change request input screen to add notes, upload any files associate with the removal request and submit for review.

The system then shows you its requested removal state which has been submitted to NSAR QA.



Individual Capabilities + REQUEST CAPABILITIES CHANGE

**Your modified capabilities have been submitted for review.**

**UPSKILL REQUESTED**

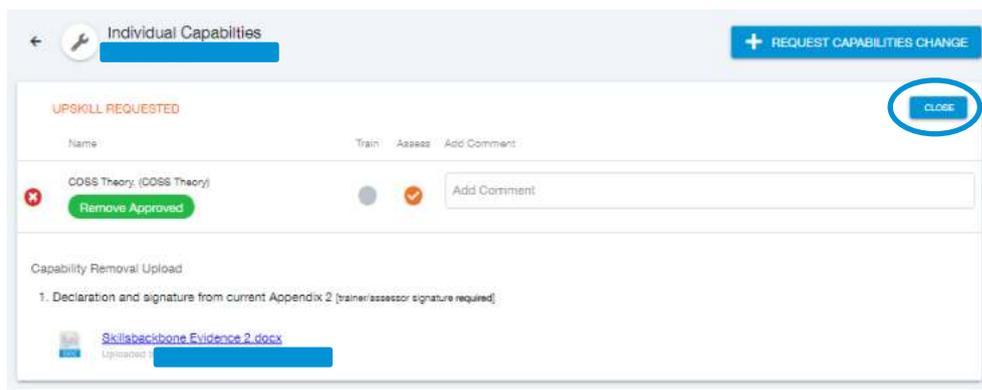
Name	Train	Assess	Add Comment
<span style="color: red;">✘</span> COSS Theory (COSS Theory) <span style="background-color: #ccc; border: 1px solid #ccc; border-radius: 5px; padding: 2px;">Removal Requested</span>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Add Comment"/>

Capability Removal Upload:

- Declaration and signature from current Appendix 2 [trainer/assessor signature required]

 [Skillsbackbone Evidence 2.docx](#)  
 Uploaded by [redacted]

NSAR QA will either **approve** or **reject** your removal request. Below shows an approval. To return to the list of approved capabilities again, **CLOSE** this window.



Individual Capabilities + REQUEST CAPABILITIES CHANGE

**UPSKILL REQUESTED** CLOSE

Name	Train	Assess	Add Comment
<span style="color: red;">✘</span> COSS Theory (COSS Theory) <span style="background-color: #2e7d32; color: white; border: 1px solid #2e7d32; border-radius: 5px; padding: 2px;">Remove Approved</span>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="Add Comment"/>

Capability Removal Upload:

- Declaration and signature from current Appendix 2 [trainer/assessor signature required]

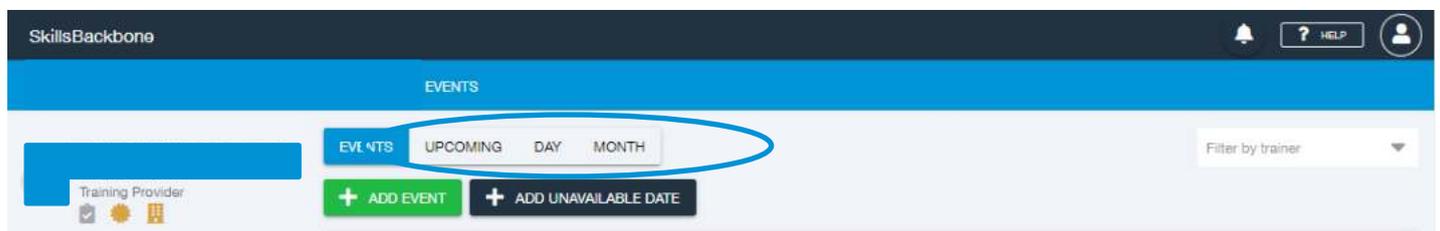
 [Skillsbackbone Evidence 2.docx](#)  
 Uploaded by [redacted]

## 7. Events Calendar

Please note that reporting from the calendar is done from the **Reports** section found in the overall left-hand side action bar and will be covered in the reporting section of this user manual.

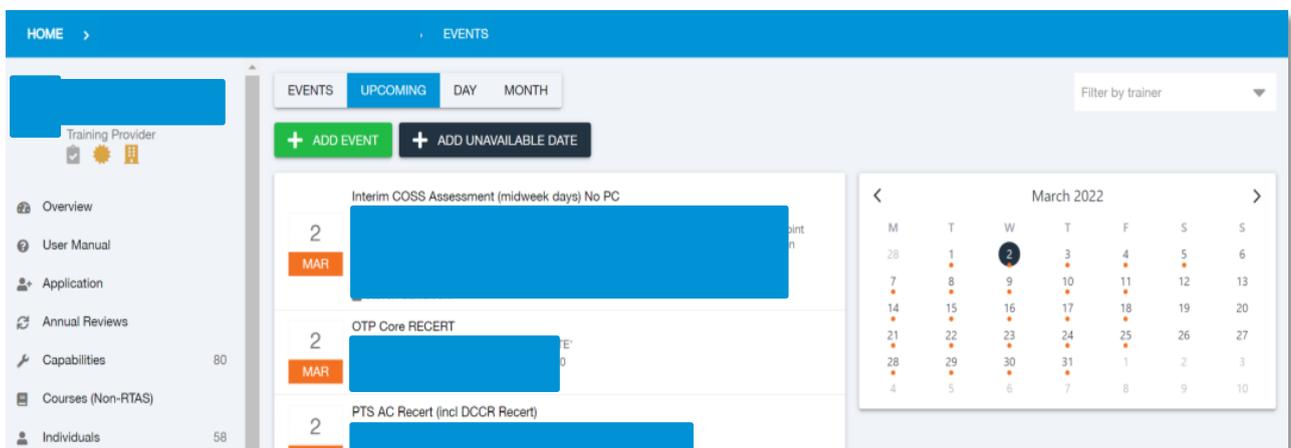
### 7.1. Viewing events

Events are defaulted to view in list format, however there are different views available which can be seen at the top of the screen.



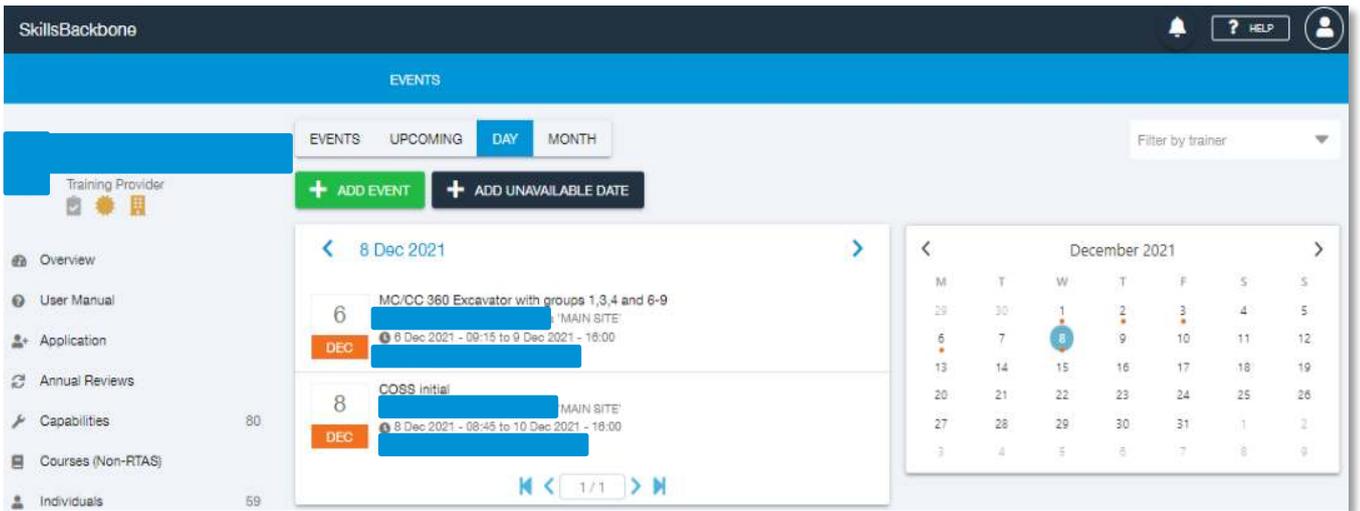
#### 7.1.1. Upcoming

This view shows you in more detail the events which are coming up and all the detail of the event in summary format. It also plots them on a calendar to see at a glance any days which training is not being delivered.



### 7.1.2. Specific Day

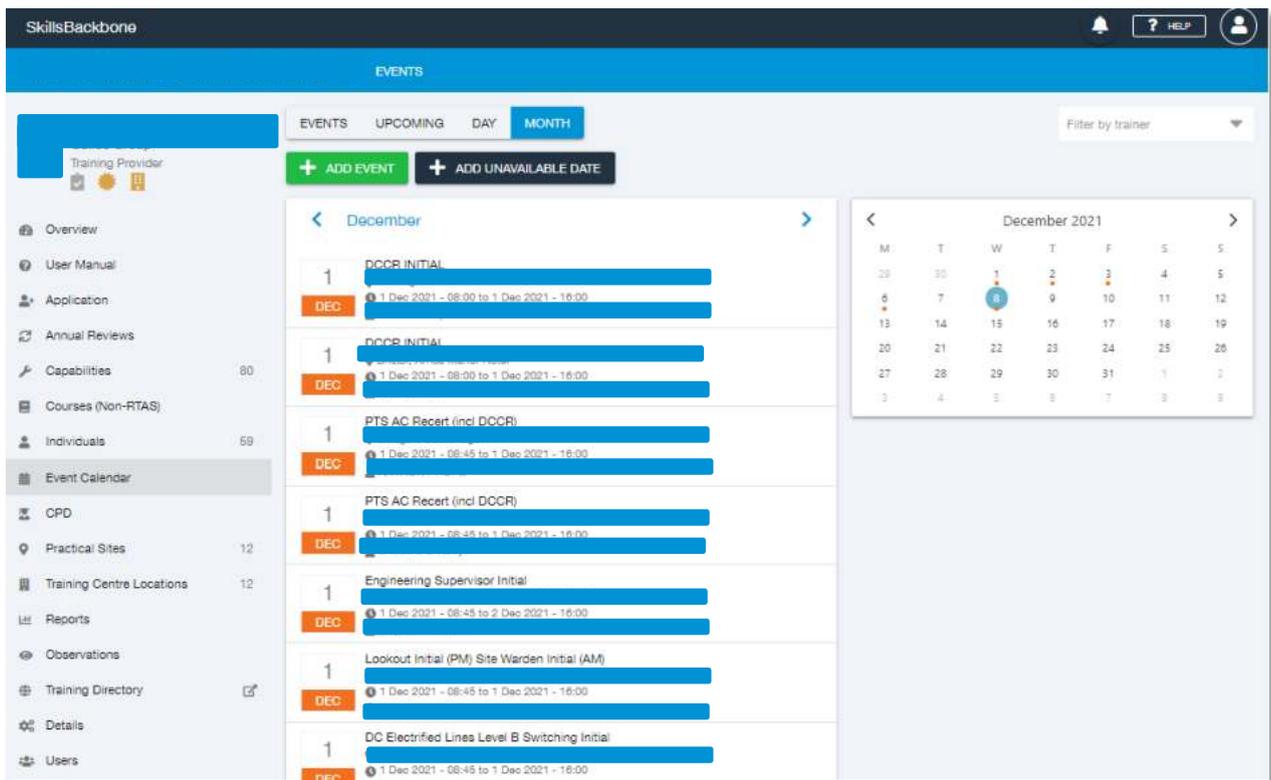
This view shows you in summary detail the events which are taking place on a specific day only which can be chosen from either the scroll left/right buttons or by selecting a day on the calendar.



The screenshot displays the SkillsBackbone interface in the 'Specific Day' view for 8 Dec 2021. The top navigation bar shows 'EVENTS', 'UPCOMING', 'DAY', and 'MONTH' tabs, with 'DAY' selected. Below the tabs are buttons for '+ ADD EVENT' and '+ ADD UNAVAILABLE DATE'. A 'Filter by trainer' dropdown is visible on the right. The main content area is split into two sections: a left-hand summary and a right-hand calendar. The summary section shows two events for 8 Dec 2021: 'MC/CC 360 Excavator with groups 1,3,4 and 6-9' (6 DEC) and 'COSS Initial' (8 DEC). The calendar on the right shows the month of December 2021, with the 8th highlighted. The left-hand navigation menu includes 'Overview', 'User Manual', 'Application', 'Annual Reviews', 'Capabilities' (80), 'Courses (Non-RTAS)', and 'Individuals' (59).

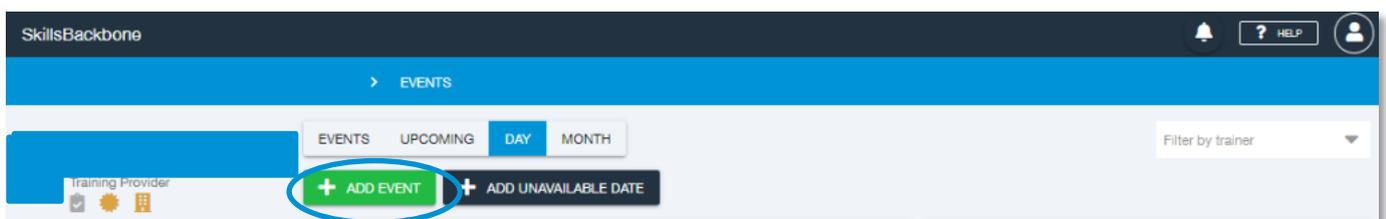
### 7.1.3. Specific Month

This view shows you the summary detail of all events being delivered in the month of your choice which can be chosen from either the scroll left/right buttons <> on the left-hand side of the screen or the scroll left/right buttons on the calendar <>. The detail is shown on the left-hand side summary.

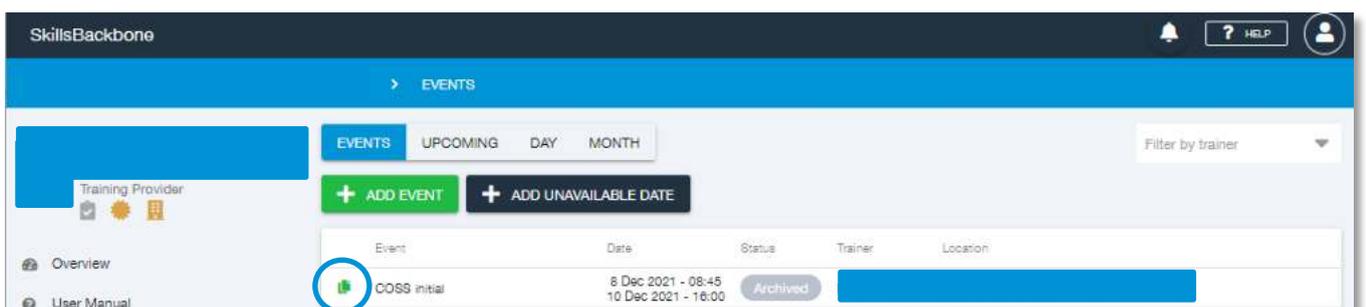


## 7.2. Adding an Event

Adding an event can be done in 2 ways. You can click **+NEW EVENT**. This will open a completely blank event for you to populate.

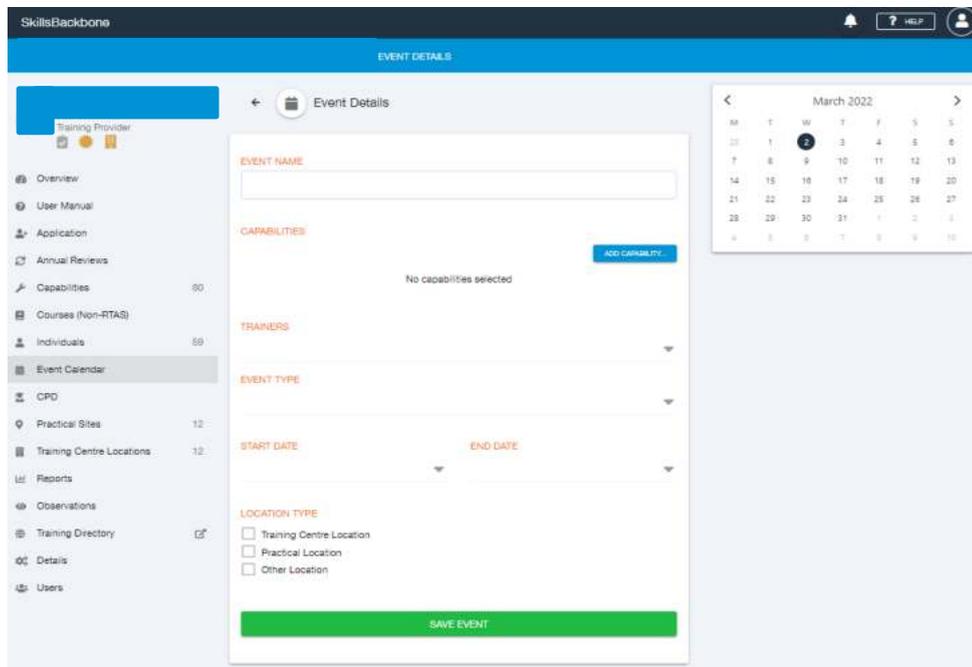


You can also **copy** an event from the main events list using the **green icon** at the left side of each event. This will copy the event chosen allowing you to edit only the fields that you require.

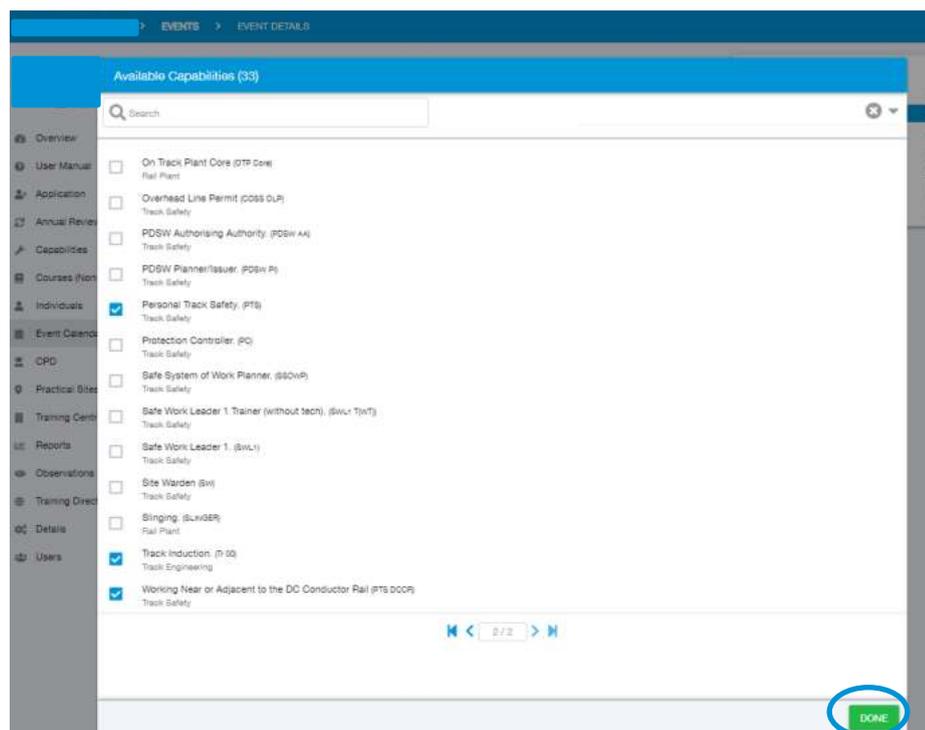


### 7.2.1. New Event

Select **+NEW EVENT** as shown above. This will open the event page for you to add the detail required.

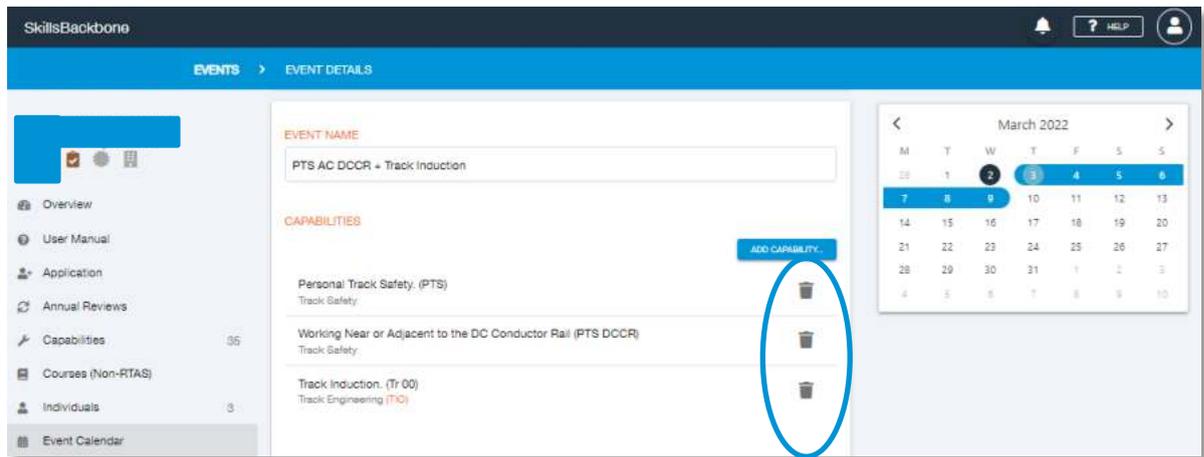


Add the Event Name, which is free text, and is the name/reference of your choosing that you as a provider refer to the course as. Then select the competences which this training event will deliver by clicking on **ADD CAPABILITY**. More than one can be added here and should be all the competences which are delivered in that course. When all competences have been selected, click **DONE**

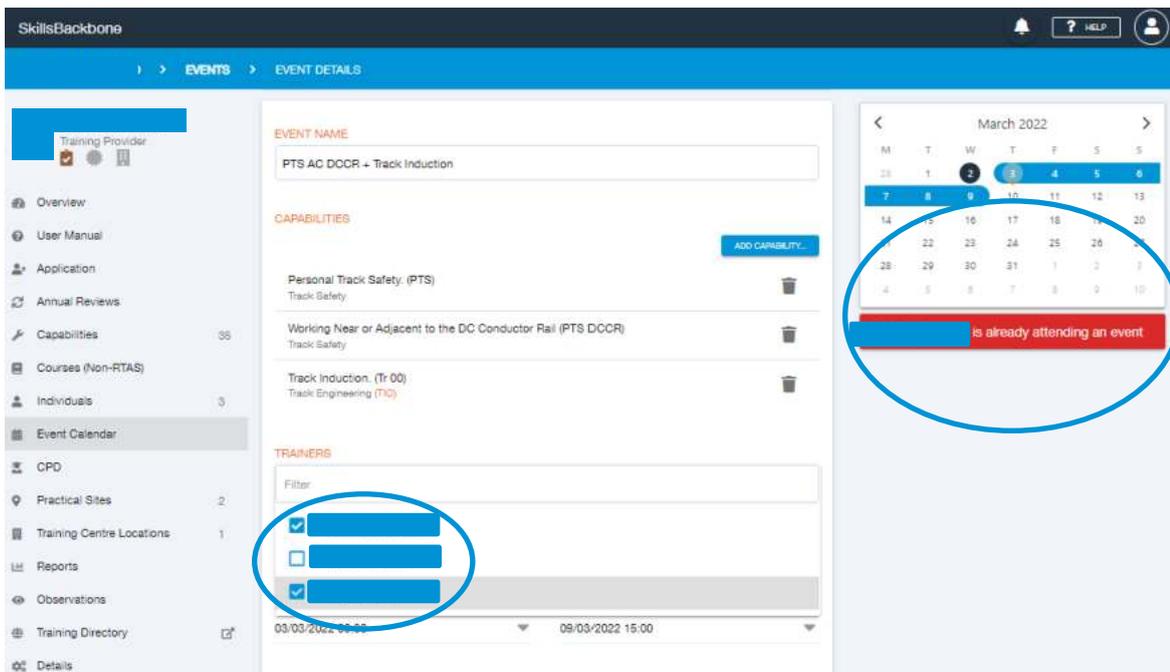


The system then lists the capabilities being delivered in the course. Please note that if you select one in error it can be removed by using the dustbin icon at the right of each competence.

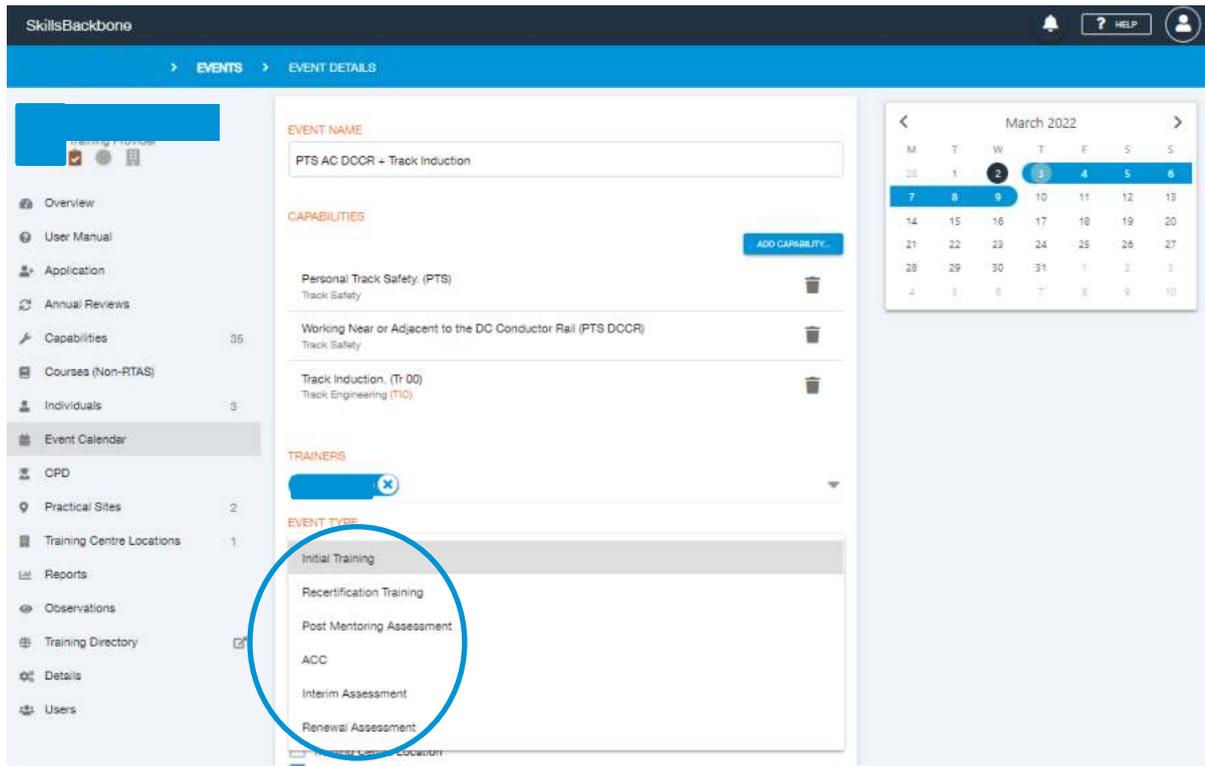
Track Induction below has (TIC) next to the name. This tells the system that the delivery of this course needs an approved practical location associated to it as below.



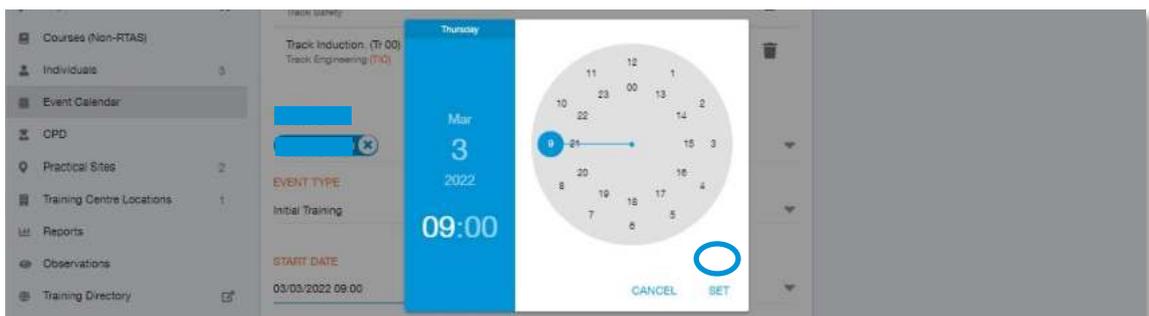
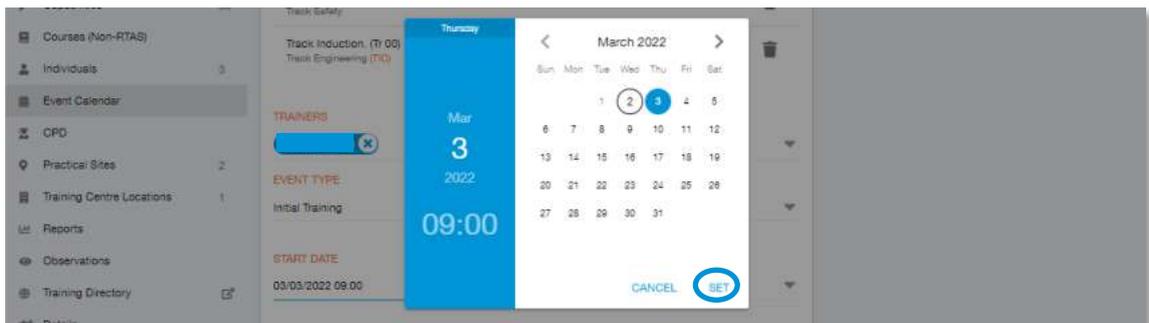
Select the trainer delivering the course. If there are 2 delivering within the one event i.e. 1 trainer for PTS and then another one for TIC, then you can select more than one trainer. If the trainer chosen is already delivering a course within the date chosen, the system will tell you this against the calendar as information only so that you have the opportunity to check your planning for any double booking.

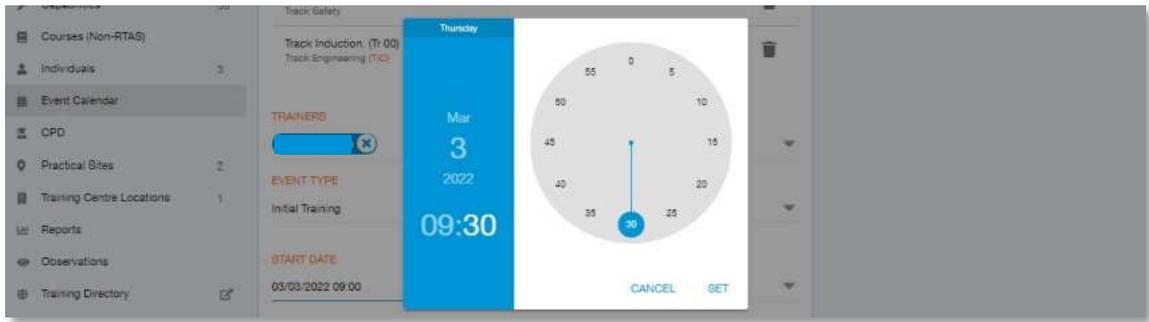


Select the Event Type from the list.

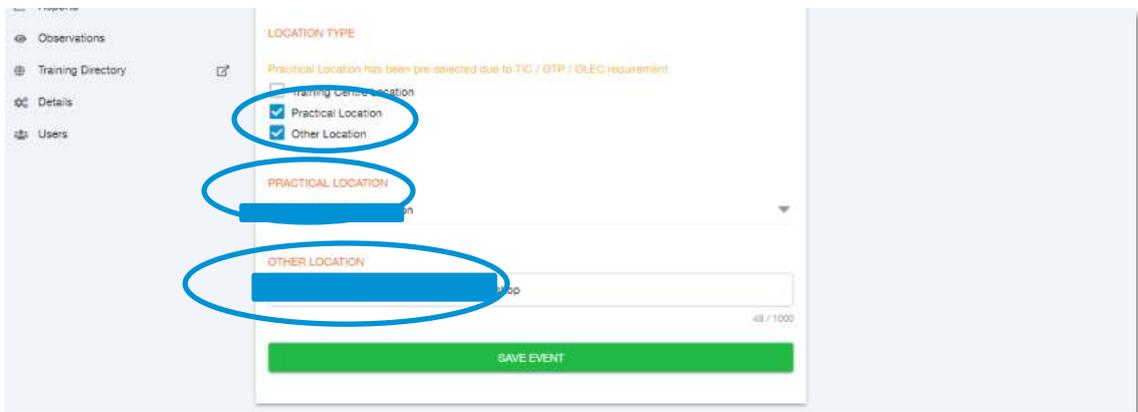


Add the start & end dates and times using the calendar and clocks that pop up in succession – hours and minutes are set separately – you can drag the hand of the clock to where you want it or click the number. When finished click **SET**





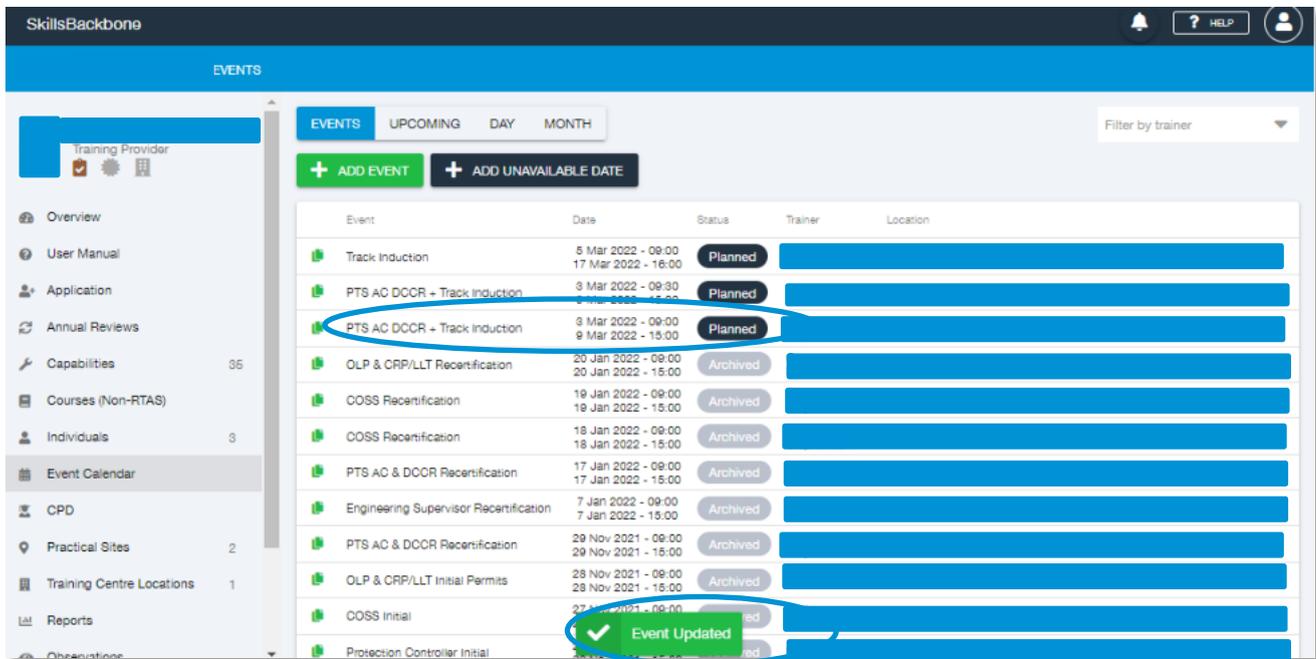
The location for all events must be recorded and where the course is not completely classroom based i.e. PTS, TIC etc., all locations must be added to the event. **Other location** is free text, training center is a drop-down list.



Where there is a competence being delivered that must have an NSAR approved practical site to deliver on, this information is **mandatory**. If you try to save the event without providing an approved practical location the system will not allow you to save the event.

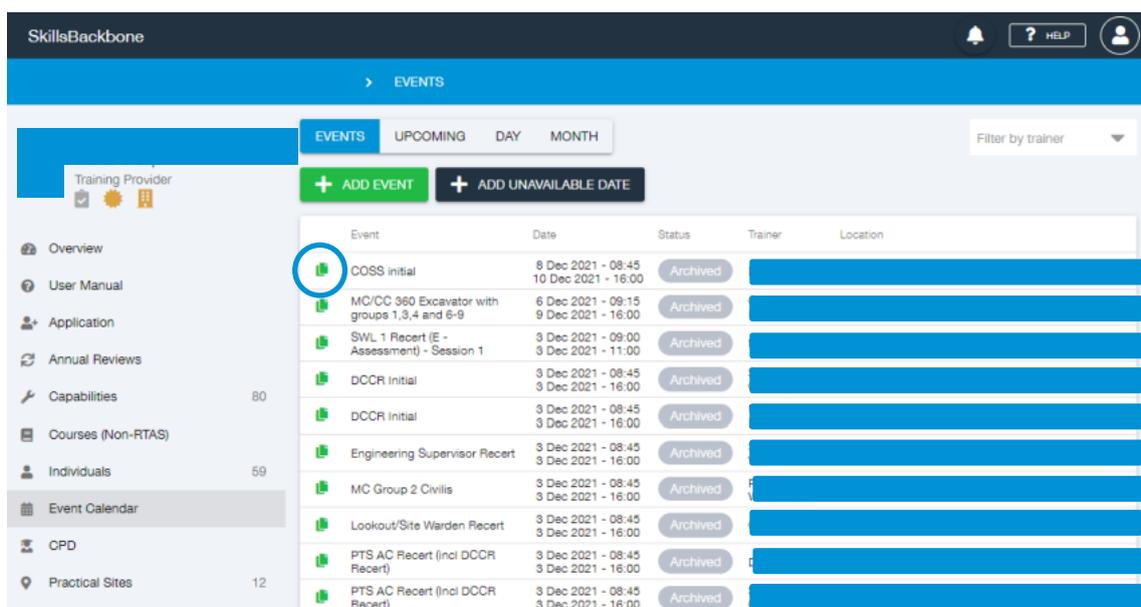


The practical location must be added from the drop-down list to allow the event to be saved. Once resolved and event is saved the system will return you to the main events list and acknowledge that a new event has been created – this notification will disappear from the screen after a few seconds.

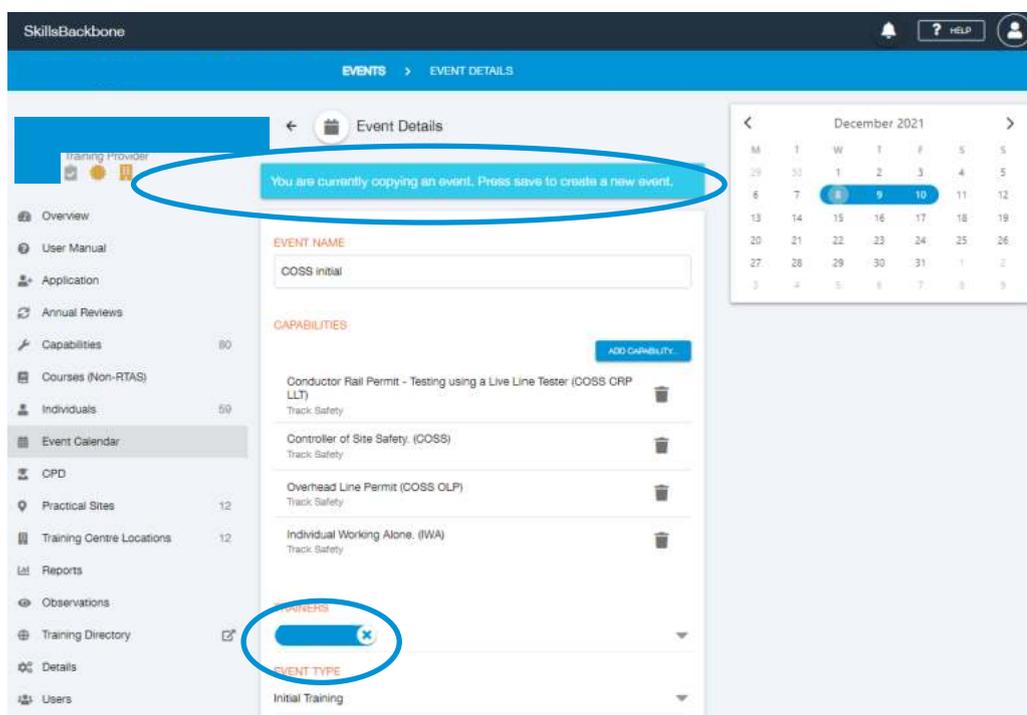


### 7.2.2. Copying an Event

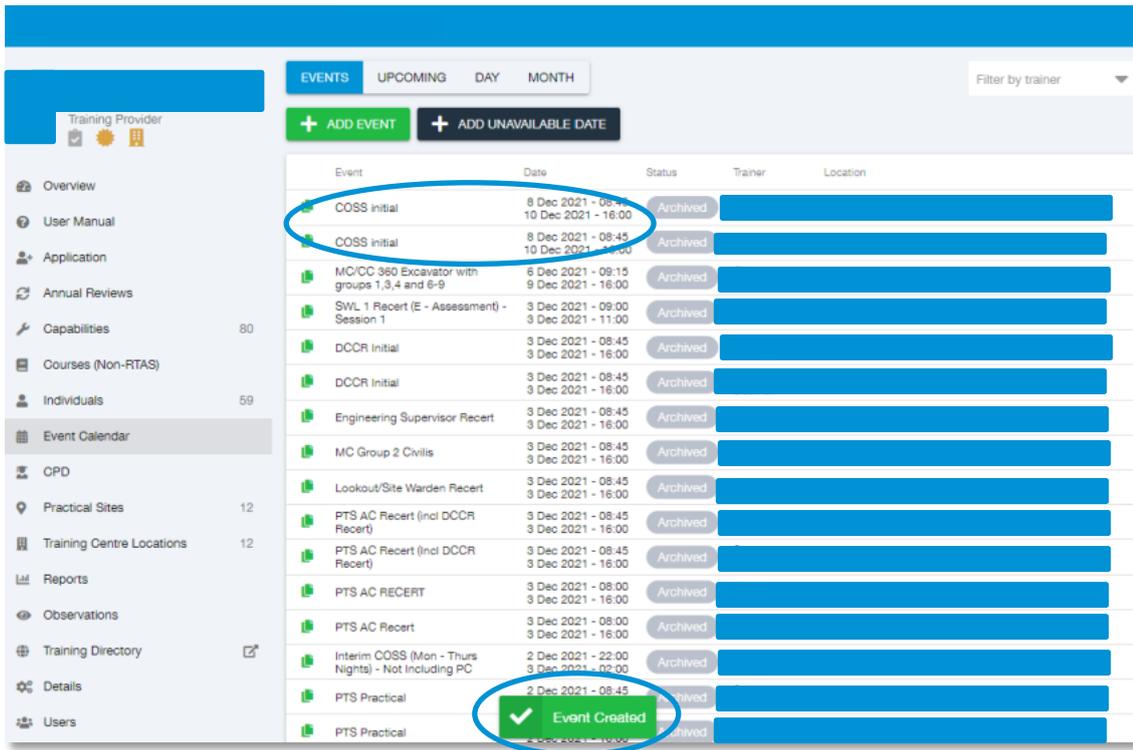
Events are copied from the main events list.



When selected, the event input screen appears with all the information associated to the original event still in place. This allows you to just change the specific information that you need to so that you can add a new event using the basis of an existing event to do it faster. The **blue banner** at the top of screen is there to remind you that are copying an existing event and that you need to **SAVE** before a new event is created from it. In the below the same event was running at the same time on the same day in the same location but with another trainer. Therefore only the trainers name needs changed.



When you have changed the information that you want to on this copied event, click **SAVE**. Again the system will return you to the main event list screen and alert that an event has been created and the new event can be seen in the list.

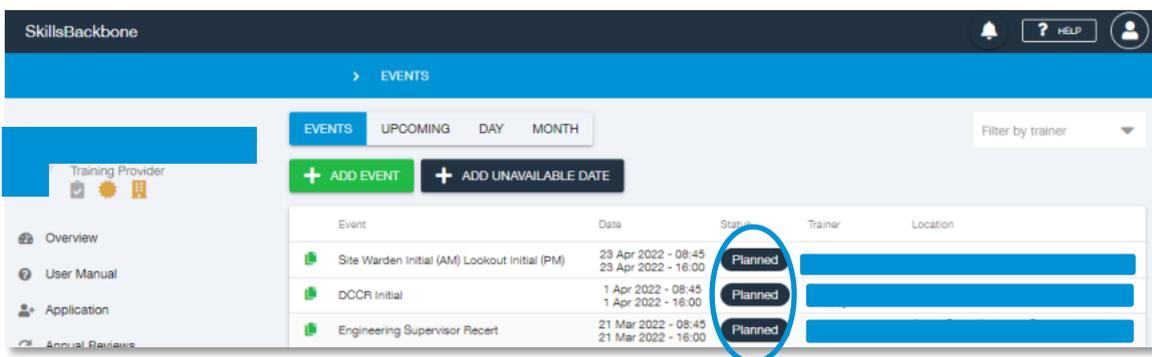


Event	Date	Status	Trainer	Location
COSS Initial	8 Dec 2021 - 08:45 10 Dec 2021 - 16:00	Archived		
COSS Initial	8 Dec 2021 - 08:45 10 Dec 2021 - 16:00	Archived		
MC/CC 360 Excavator with groups 1,3,4 and 6-9	6 Dec 2021 - 09:15 9 Dec 2021 - 16:00	Archived		
SWL 1 Recert (E - Assessment) - Session 1	3 Dec 2021 - 09:00 3 Dec 2021 - 11:00	Archived		
DCCR Initial	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
DCCR Initial	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
Engineering Supervisor Recert	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
MC Group 2 Civilis	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
Lookout/Site Warden Recert	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
PTS AC Recert (incl DCCR Recert)	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
PTS AC Recert (incl DCCR Recert)	3 Dec 2021 - 08:45 3 Dec 2021 - 16:00	Archived		
PTS AC RECERT	3 Dec 2021 - 08:00 3 Dec 2021 - 16:00	Archived		
PTS AC Recert	3 Dec 2021 - 08:00 3 Dec 2021 - 16:00	Archived		
Interim COSS (Mon - Thurs Nights) - Not including PC	2 Dec 2021 - 22:00 3 Dec 2021 - 02:00	Archived		
PTS Practical	2 Dec 2021 - 08:45	Archived		
PTS Practical	2 Dec 2021 - 08:45	Archived		

All events show as planned until the start date of the course is the real time date. The course will then show as **LIVE**. The event will automatically **ARCHIVE** once 2 days have passed in real time from the end date of the event.

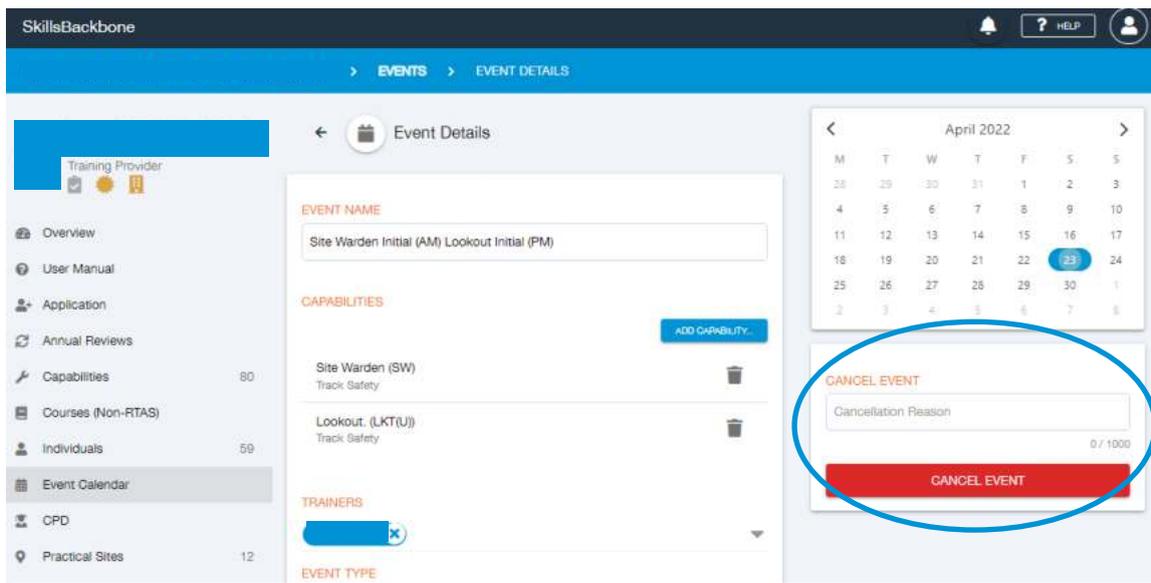
### 7.3. Editing and Cancelling an Event

If you need to edit or cancel an event where its status is showing as planned, this can be done by clicking the status of the course which you want to edit or cancel. Click on the **PLANNED** icon.

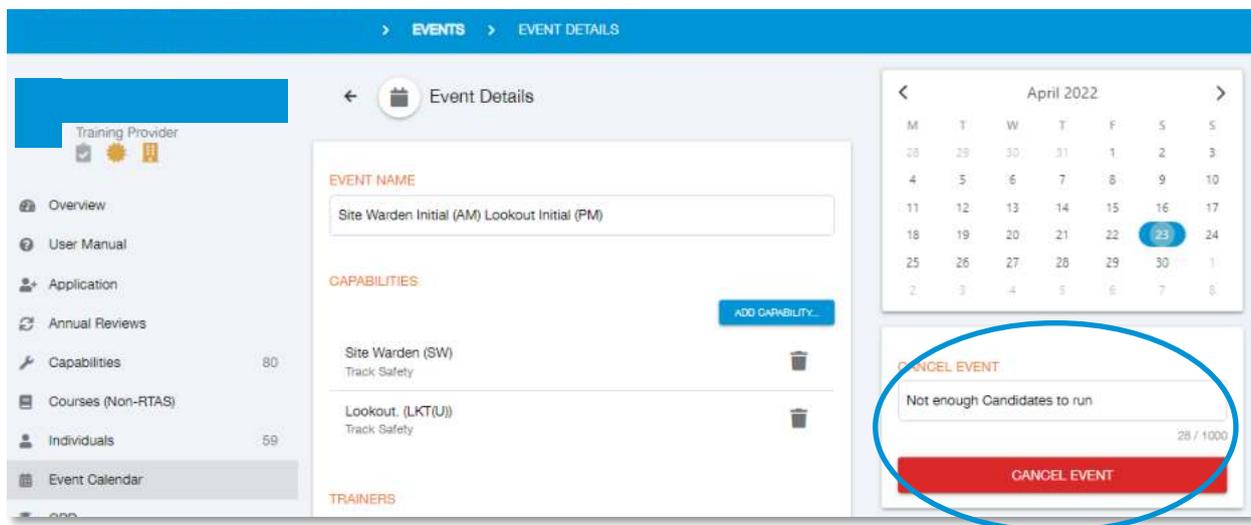


Event	Date	Status	Trainer	Location
Site Warden Initial (AM) Lookout Initial (PM)	23 Apr 2022 - 08:45 23 Apr 2022 - 16:00	Planned		
DCCR Initial	1 Apr 2022 - 08:45 1 Apr 2022 - 16:00	Planned		
Engineering Supervisor Recert	21 Mar 2022 - 08:45 21 Mar 2022 - 16:00	Planned		

The system will then open the event input screen where you can amend the details of the planned event to edit it if needed or cancel the event if needed.



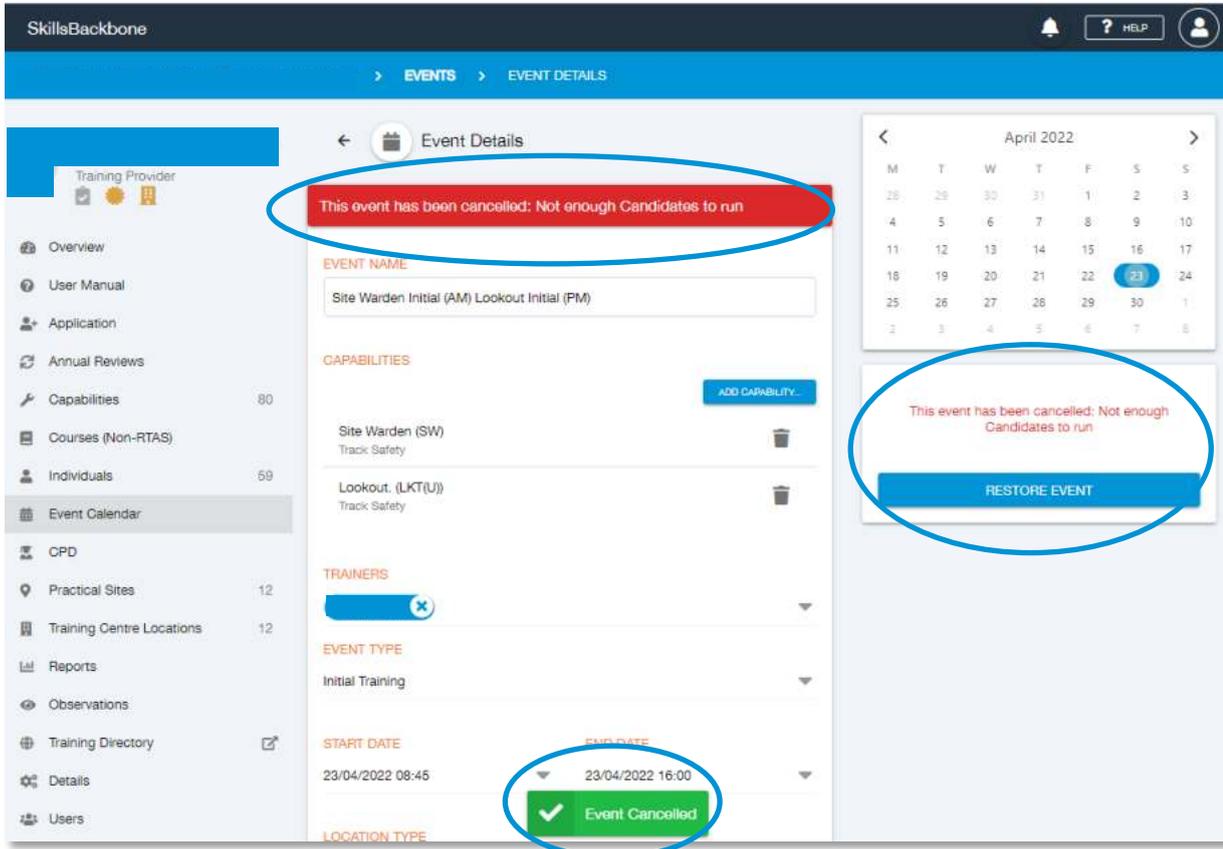
Once you have edited what you need to you can **SAVE** when complete which will return you to the main events list and will show the updated details. If you need to cancel the event, free text the reason for the cancellation and click **CANCEL EVENT**



If you try to **cancel** and event without adding a reason the system will prompt you that a reason is required before the event will cancel.



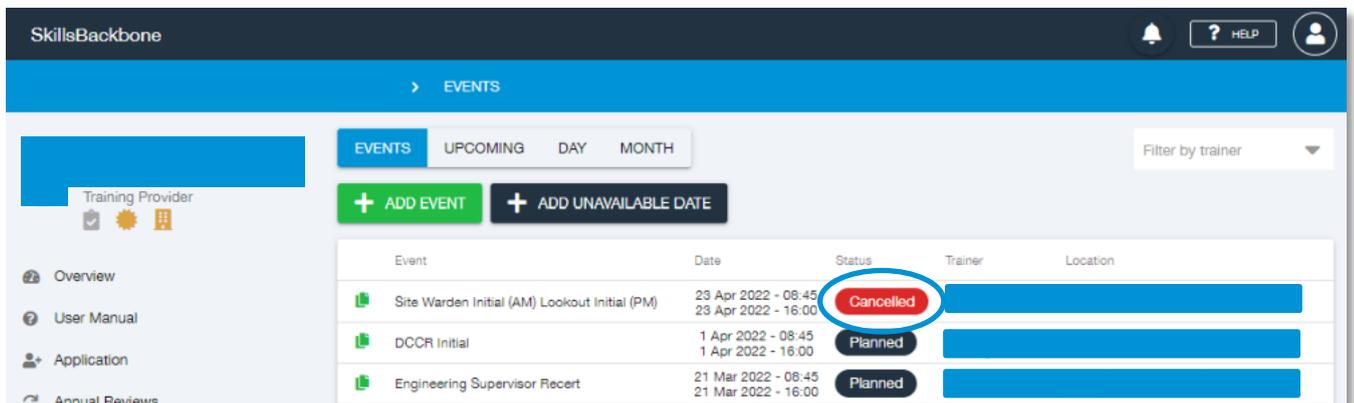
Once the **cancel** action taken has been accepted the system will confirm that this has been completed in 3 places. To return back to the main list of events use the arrow to the left of the Event Details icon.



The screenshot shows the 'Event Details' page for an event titled 'Site Warden Initial (AM) Lookout Initial (PM)'. The event status is 'Event Cancelled', indicated by a green checkmark icon. Three red circles highlight the following elements:

- A red error message at the top: "This event has been cancelled: Not enough Candidates to run".
- A modal dialog box containing the same error message and a blue "RESTORE EVENT" button.
- A green confirmation message at the bottom: "Event Cancelled" with a checkmark icon.

This event will now appear at the top of the list showing as **Cancelled**



The screenshot shows the 'EVENTS' list page. The event 'Site Warden Initial (AM) Lookout Initial (PM)' is listed at the top with a status of 'Cancelled', which is circled in red. Below it are two 'Planned' events.

Event	Date	Status	Trainer	Location
Site Warden Initial (AM) Lookout Initial (PM)	23 Apr 2022 - 08:45 23 Apr 2022 - 16:00	Cancelled		
DCCR Initial	1 Apr 2022 - 08:45 1 Apr 2022 - 16:00	Planned		
Engineering Supervisor Recert	21 Mar 2022 - 08:45 21 Mar 2022 - 16:00	Planned		

## 8. CPD

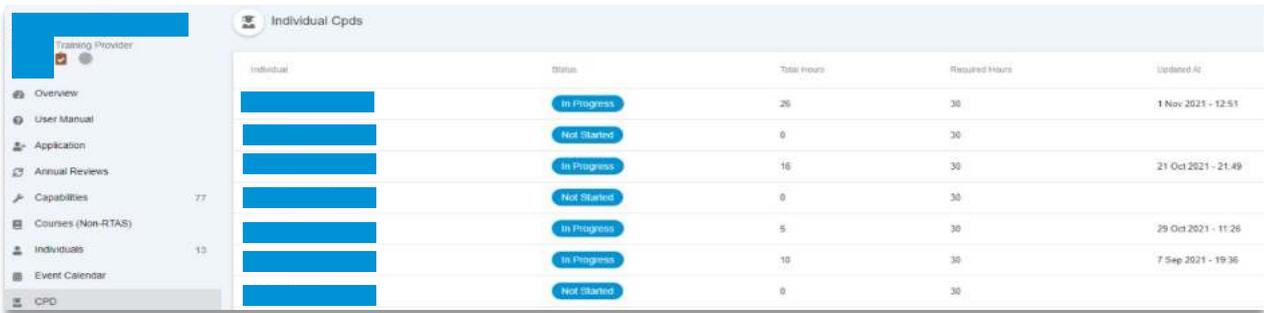
This section gives administrators and managers a detailed view of CPD upload progress of their trainer/assessors including their progress status, total hours submitted, number of required hours and the detail of what has been submitted and uploaded by their staff.

This is a read only function to view CPD progress. **Changes to CPD can only be made by trainer/assessors from their individual accounts.**

Monthly alerts and emails will be sent from Skills Backbone to managers and administrators to keep them informed of CPD progress throughout the CPD year.

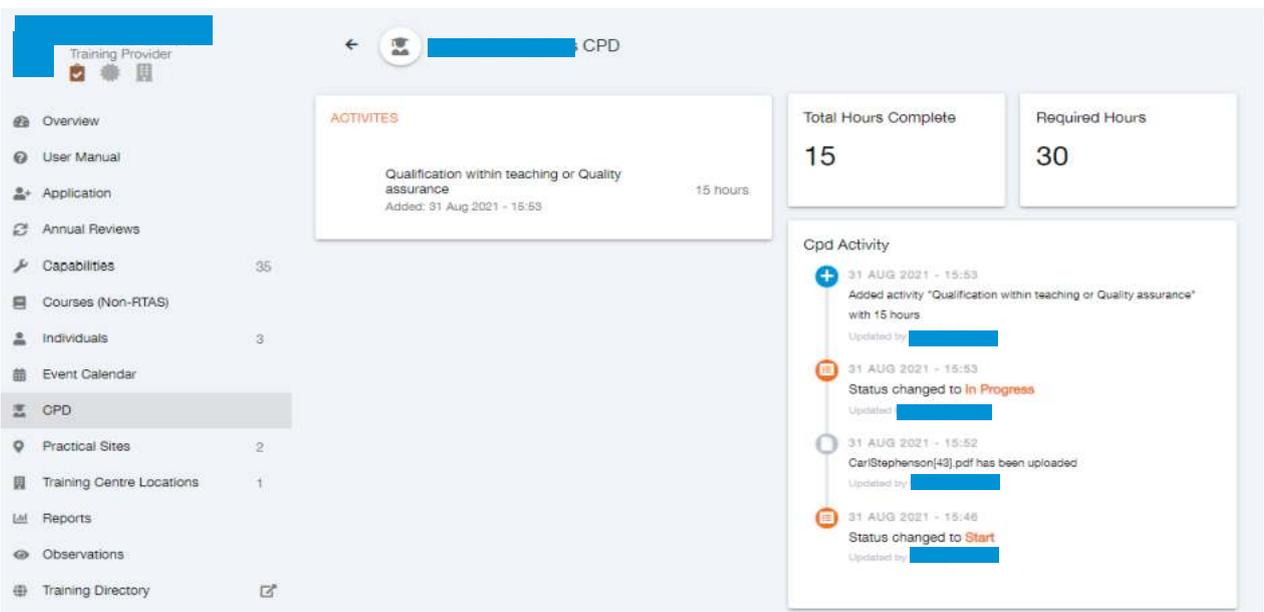
### 8.1. Administrators and Managers

When the CPD tab is opened you will see the summary list of trainer/assessors and their CPD portfolio status, total hours logged to date and the required hours.



Individual	Status	Total Hours	Required Hours	Updated At
[Redacted]	In Progress	26	30	1 Nov 2021 - 12:51
[Redacted]	Not Started	0	30	
[Redacted]	In Progress	16	30	21 Oct 2021 - 21:49
[Redacted]	Not Started	0	30	
[Redacted]	In Progress	5	30	29 Oct 2021 - 11:26
[Redacted]	In Progress	10	30	7 Sep 2021 - 19:36
[Redacted]	Not Started	0	30	

The detail can be seen for each individual on the list by clicking on the individual that you want to view in detail. You will also be able to see a **CPD Activity** timeline which will record how often a trainer/assessor is updating their CPD portfolio.



**ACTIVITIES**

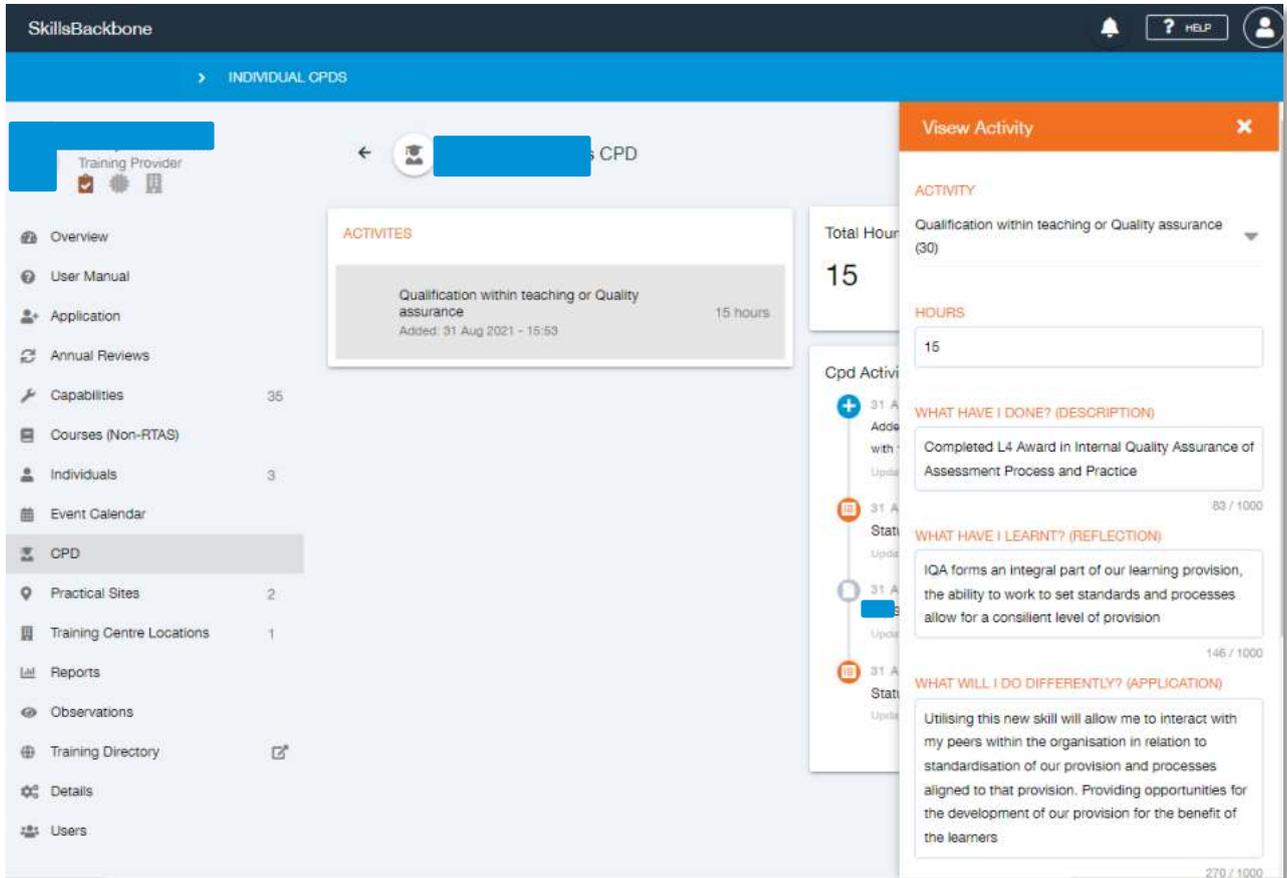
- Qualification within teaching or Quality assurance (15 hours)  
Added: 31 Aug 2021 - 15:53

**Total Hours Complete: 15**      **Required Hours: 30**

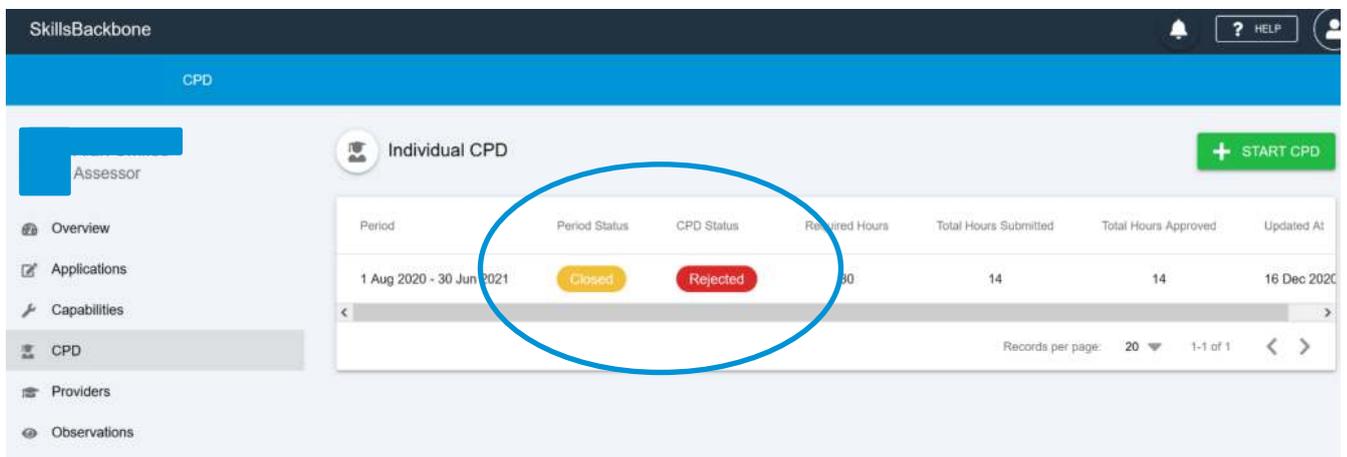
**Cpd Activity Timeline:**

- 31 AUG 2021 - 15:53: Added activity "Qualification within teaching or Quality assurance" with 15 hours. Updated by [Redacted]
- 31 AUG 2021 - 15:53: Status changed to **In Progress**. Updated by [Redacted]
- 31 AUG 2021 - 15:52: Car/Stephenson[49].pdf has been uploaded. Updated by [Redacted]
- 31 AUG 2021 - 15:46: Status changed to **Start**. Updated by [Redacted]

To see specific detail about an item, click on the **activity** that you want to view, and the **detail side bar** will open. This sidebar is scrollable to see responses to reflections and the evidence uploaded.



Where CPD portfolios remain **in progress** at the end of the CPD year, it will be automatically **rejected**. Where CPD has been **rejected** this is seen on the summary page easily identifiable.



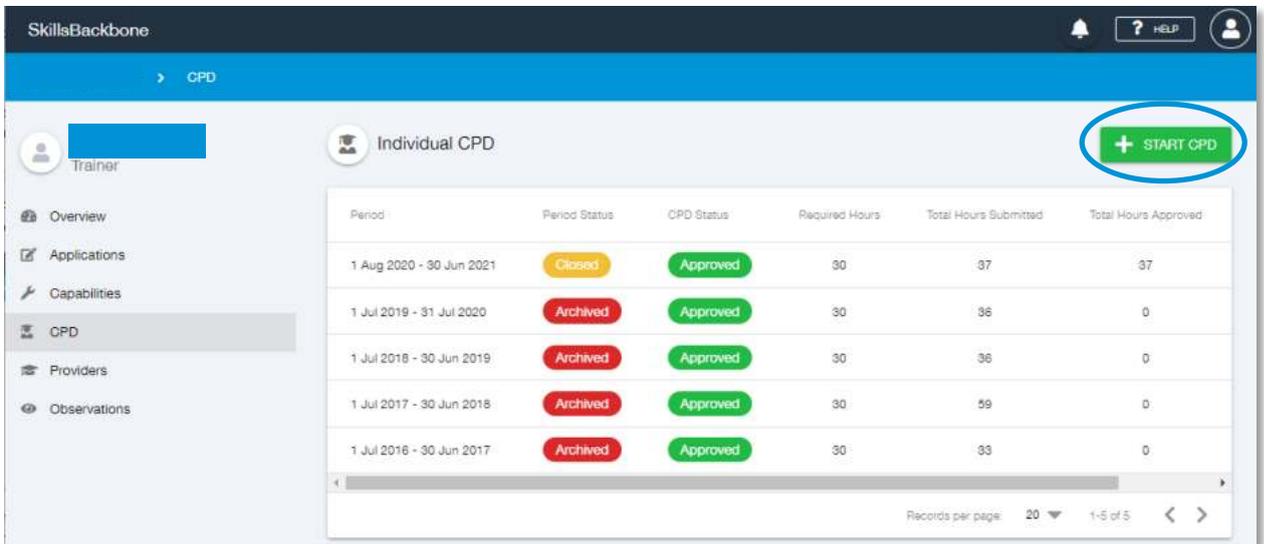
Period	Period Status	CPD Status	Required Hours	Total Hours Submitted	Total Hours Approved	Updated At
1 Aug 2020 - 30 Jun 2021	Closes	Rejected	30	14	14	16 Dec 2020

## 8.2. Trainer and Assessors

For Trainers and Assessors to submit their CPD hours they need to log into their Individual Skills Backbone accounts. Once on the Overview page select CPD from the left hand list.

This will load up all current and previous years CPD. On this screen individuals can monitor their current progress with the number of hours logged and status of CPD submission.

At the start of the CPD year press the **START CPD** button at the top right to begin.

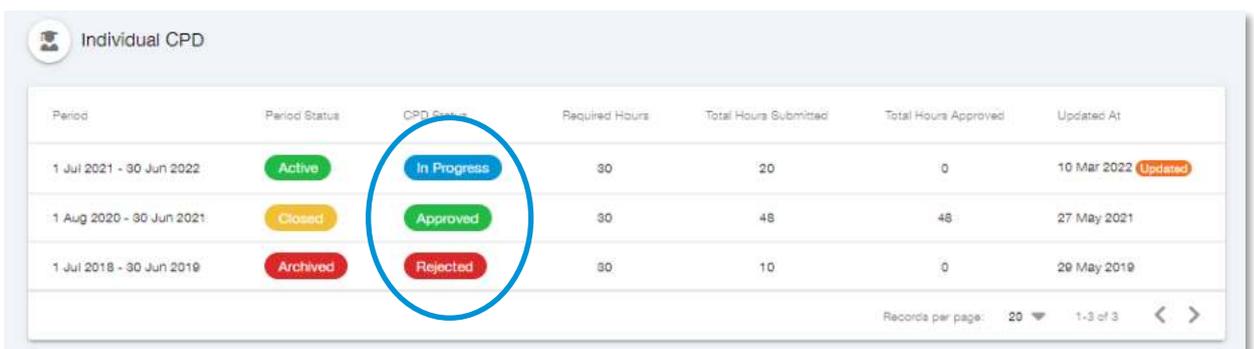


The screenshot shows the SkillsBackbone interface for CPD. The left sidebar contains navigation options: Overview, Applications, Capabilities, CPD (selected), Providers, and Observations. The main content area is titled 'Individual CPD' and features a table with the following data:

Period	Period Status	CPD Status	Required Hours	Total Hours Submitted	Total Hours Approved
1 Aug 2020 - 30 Jun 2021	Closed	Approved	30	37	37
1 Jul 2019 - 31 Jul 2020	Archived	Approved	30	36	0
1 Jul 2018 - 30 Jun 2019	Archived	Approved	30	36	0
1 Jul 2017 - 30 Jun 2018	Archived	Approved	30	59	0
1 Jul 2016 - 30 Jun 2017	Archived	Approved	30	33	0

A green '+ START CPD' button is circled in the top right corner of the page.

If you have already started your CPD and wish to add more activities, click on **In Progress** under CPD Status.



The screenshot shows the SkillsBackbone interface for CPD. The left sidebar contains navigation options: Overview, Applications, Capabilities, CPD (selected), Providers, and Observations. The main content area is titled 'Individual CPD' and features a table with the following data:

Period	Period Status	CPD Status	Required Hours	Total Hours Submitted	Total Hours Approved	Updated At
1 Jul 2021 - 30 Jun 2022	Active	In Progress	30	20	0	10 Mar 2022 <span>Updated</span>
1 Aug 2020 - 30 Jun 2021	Closed	Approved	30	48	48	27 May 2021
1 Jul 2018 - 30 Jun 2019	Archived	Rejected	30	10	0	29 May 2019

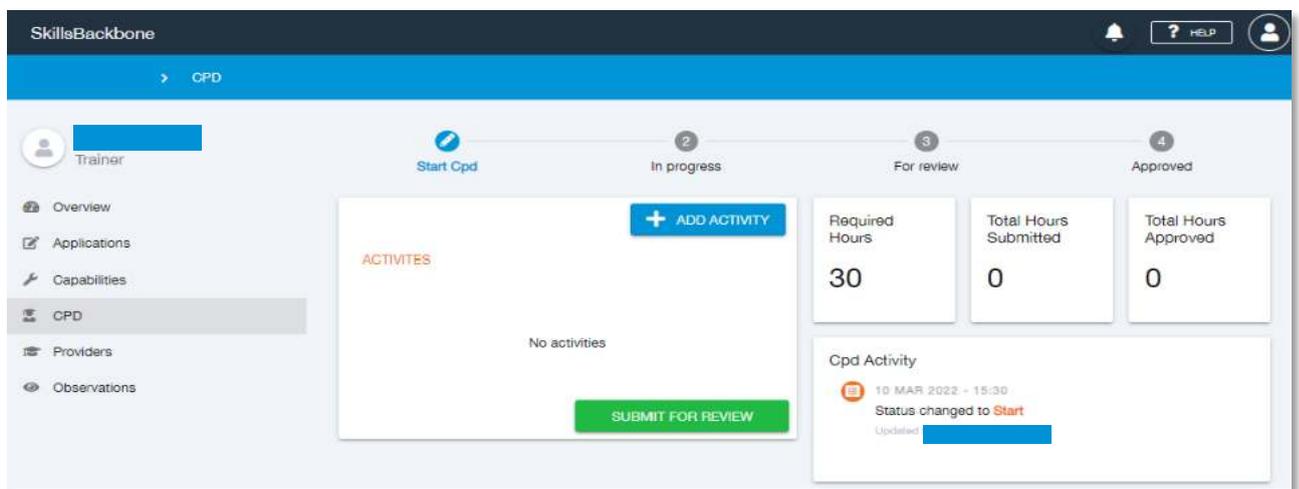
The 'In Progress' status in the CPD Status column is circled in the screenshot.

You can access CPD submission from previous years by pressing the CPD Status buttons.

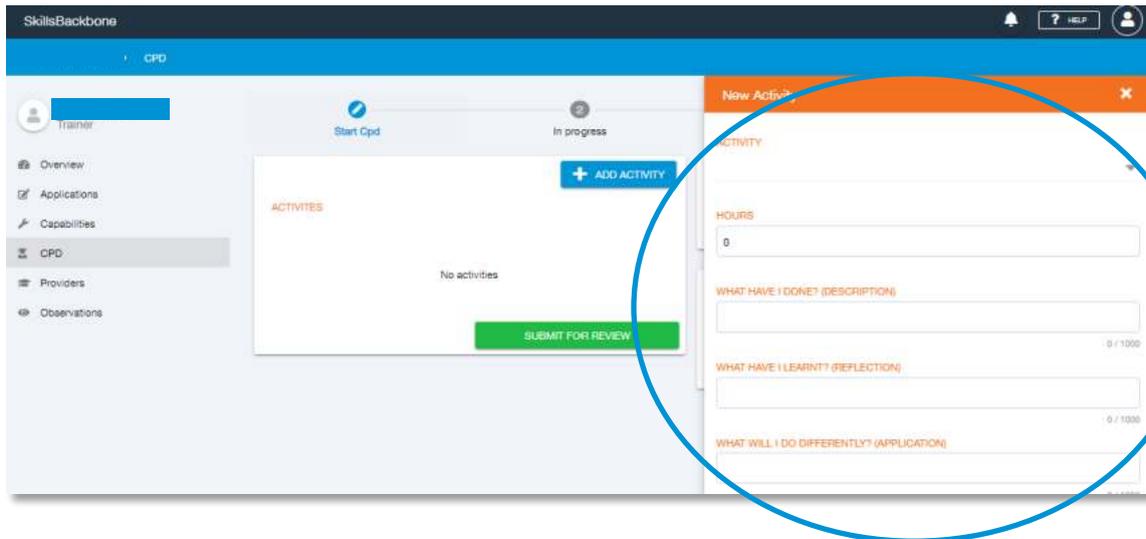
This will take you to the CPD submission screen where you can submit CPD activities.

You can also see how many hours are required to be completed during the up coming year. Each trainer/assessor will show as **30** required hours. Where a dispensation has been given for reduced total hours, NSAR will amend the total hours required for that individual which will show in your view. A request for dispensation must be done via direct contact with NSAR through Freshdesk, it cannot be done within Skills Backbone.

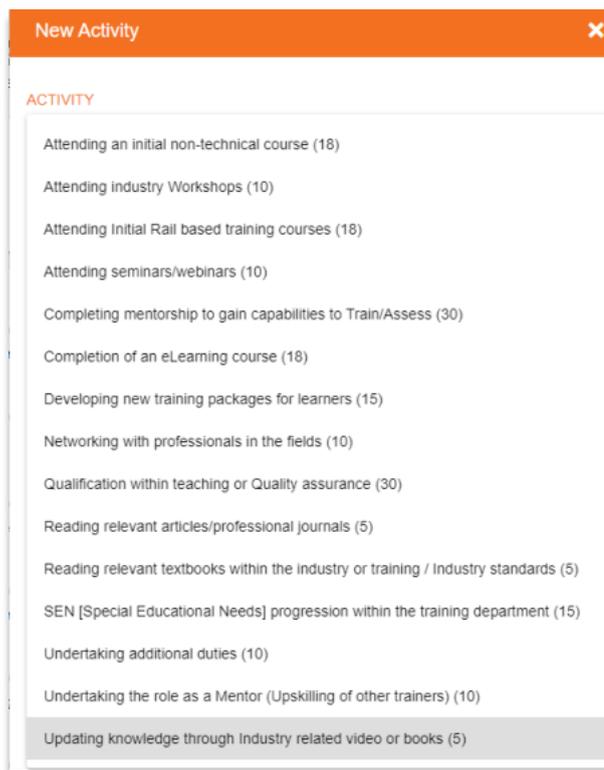
*N.B. Dispensations for reduced hours of CPD are valid for one CPD year only. Total hours required will revert to 30 hours at the start of the new CPD year and the dispensation application is required to be repeated in order to have the total required hours reduced again.*



To add a new activity press the blue **ADD Activity** button. This will open a window from the right hand side of the screen.



Select Activity from the drop down menu. The number in the brackets by the title indicates the number of claimable hours available for the activity.

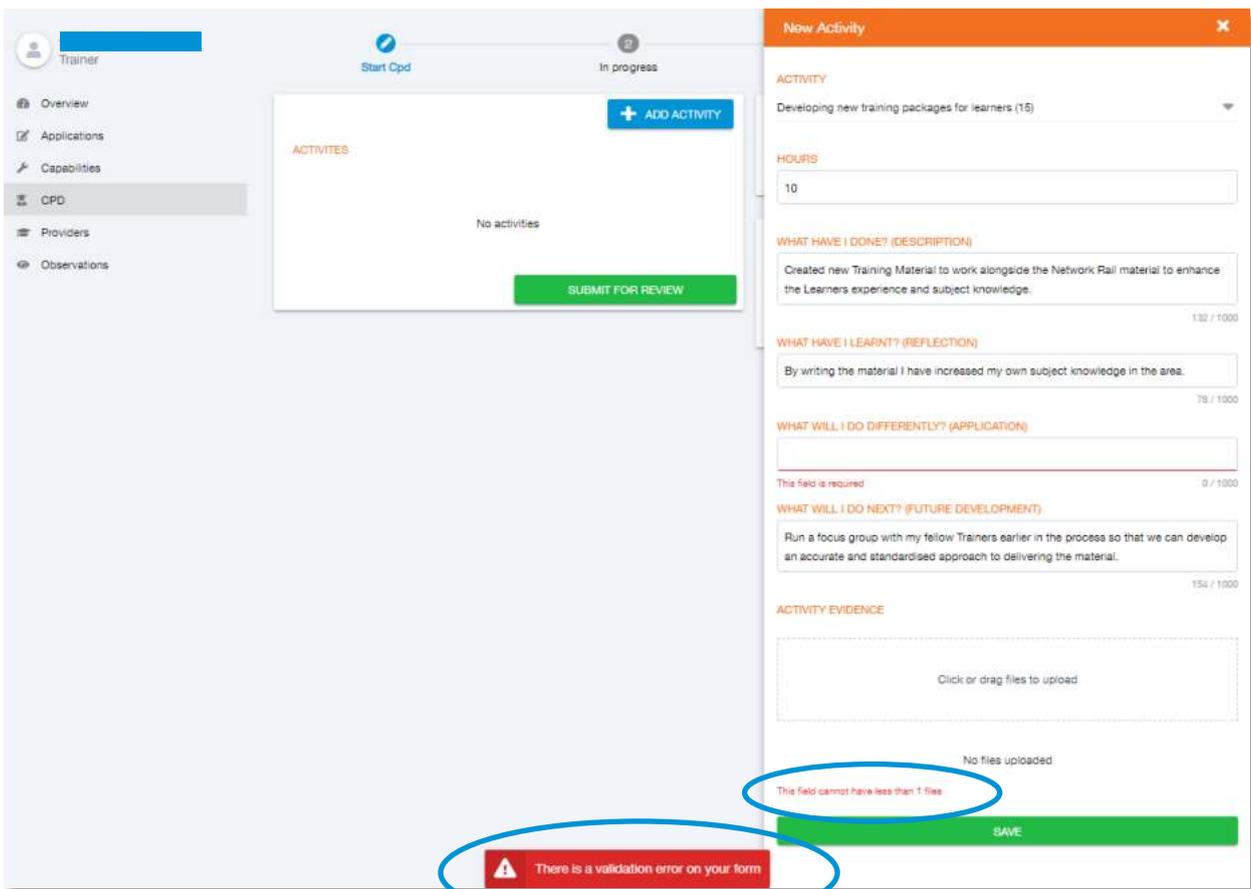


Fill in the number of hours spent completing your activity. Where you have reached an activity cap, submission to that category will not be accepted by the system. If you try to submit over the capped hours, you will get a warning message at the bottom of the screen.

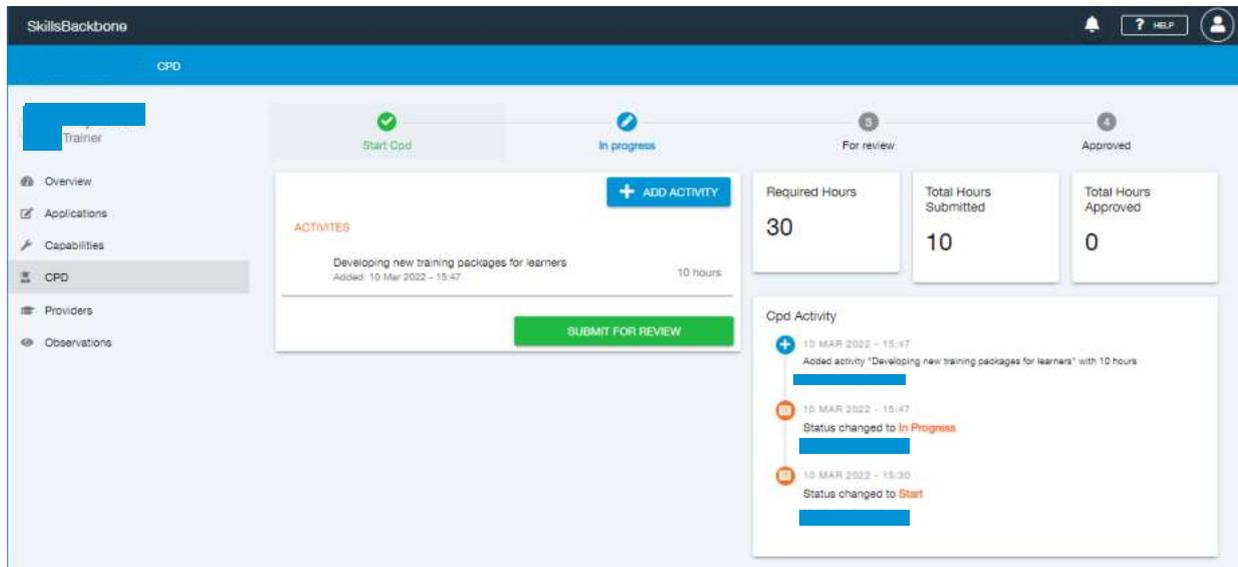


Fill in all of the required fields and upload supporting evidence using the same method as covered previously within this manual. Once you have completed the review press **SAVE**.

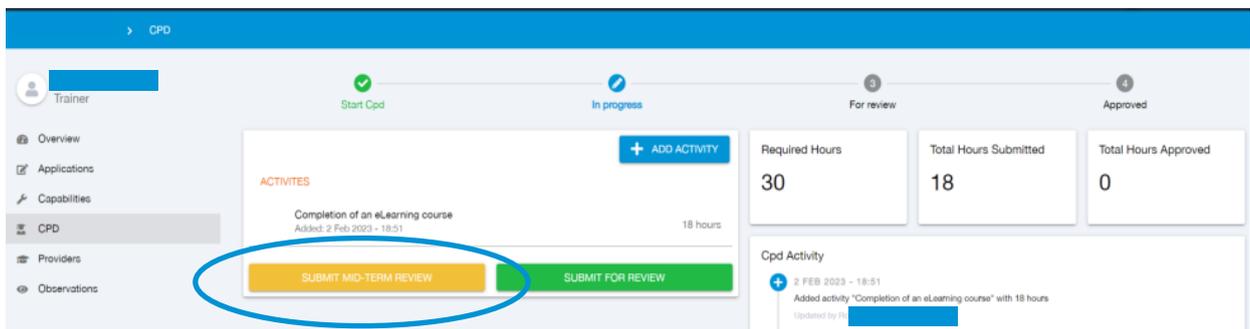
If you try to press save without filling in all the required fields or uploading any supporting evidence an error message will show in 2 places on the screen and you will be unable to save the activity.



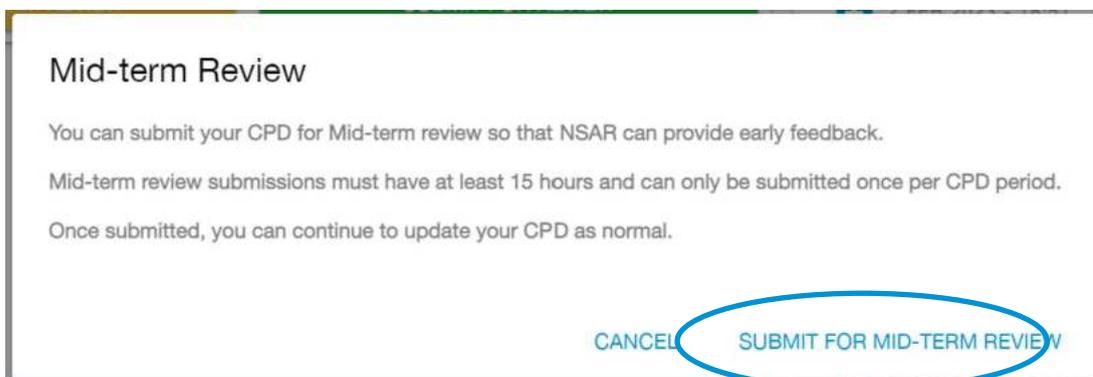
Once you have pressed save you will be taken back to the progress screen.



Once you have added some activities and achieved over 15 hours CPD you can submit them for a mid term review. To do this press the **Orange** Submit Mid Term Review button.

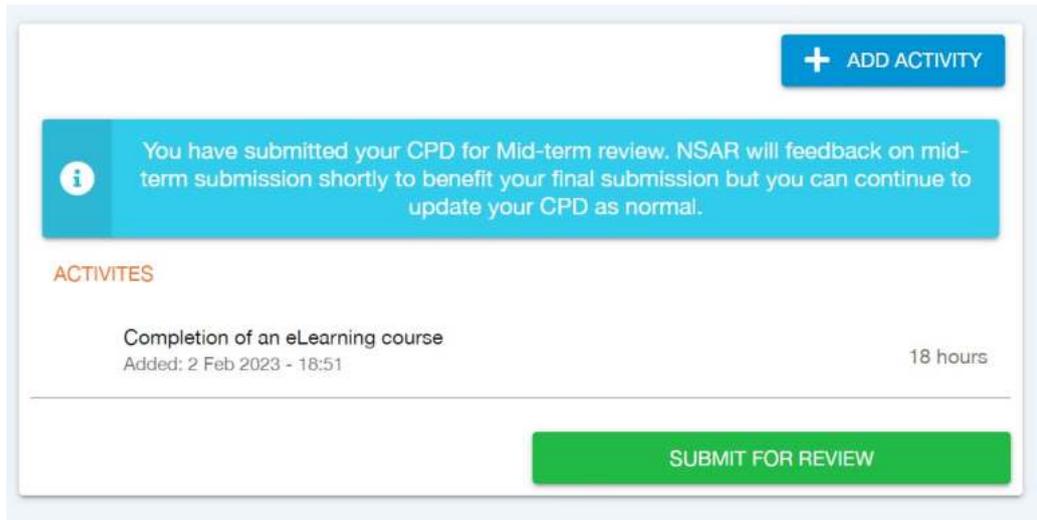


Once pressed the submit mid term review function another window shall appear double checking you are happy to continue.

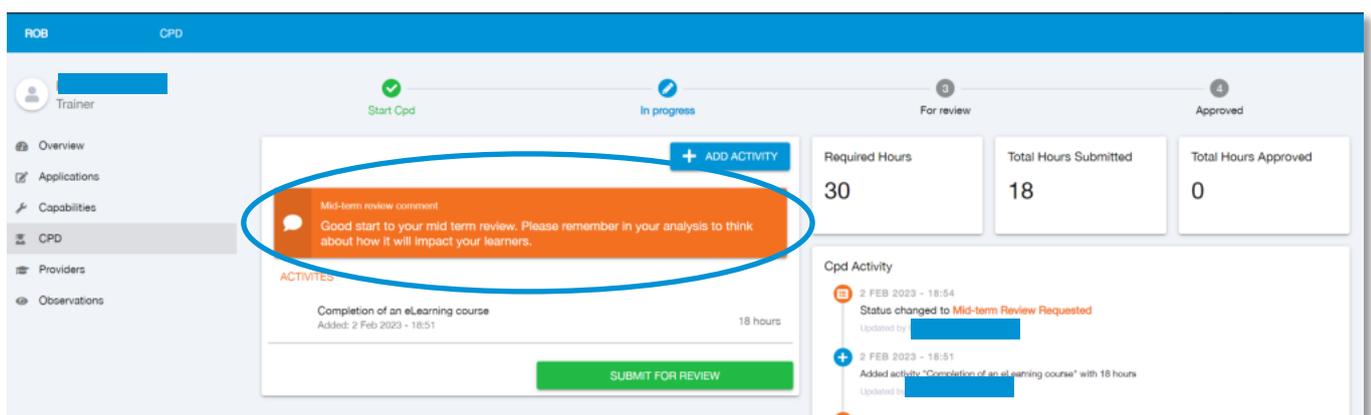


Press **Submit for Mid-Term Review** if you are happy to continue or **Cancel** if you wish to add more CPD activities.

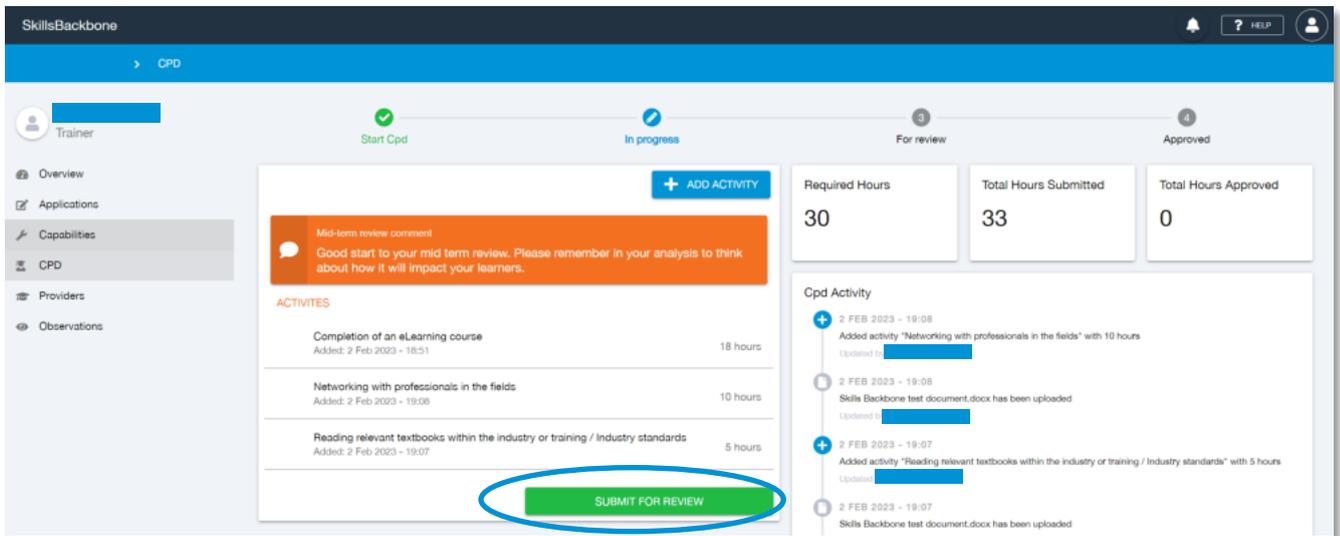
Once submitted you will be taken back to the home screen and a message window will appear stating that you have submitted your mid term review.



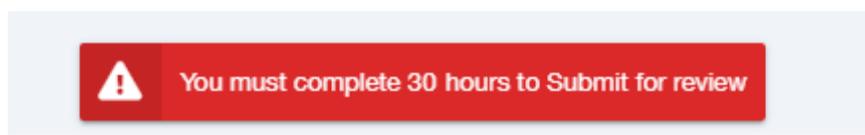
Your submitted CPD will be reviewed by NSAR and feedback will be given. Your activity will either be approved or more information will be required, you will get an explanation as to what is required.



Once you have submitted all your CPD activities you can submit your activities with via the **green** submit button.

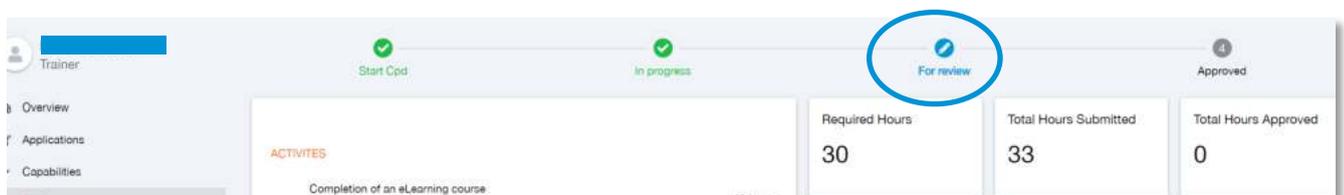


The CPD portfolio [i.e., all activities] cannot be submitted for review until the required hours total has been met. If you attempt to submit it for review while under the required hours, you will receive the bellow error message.

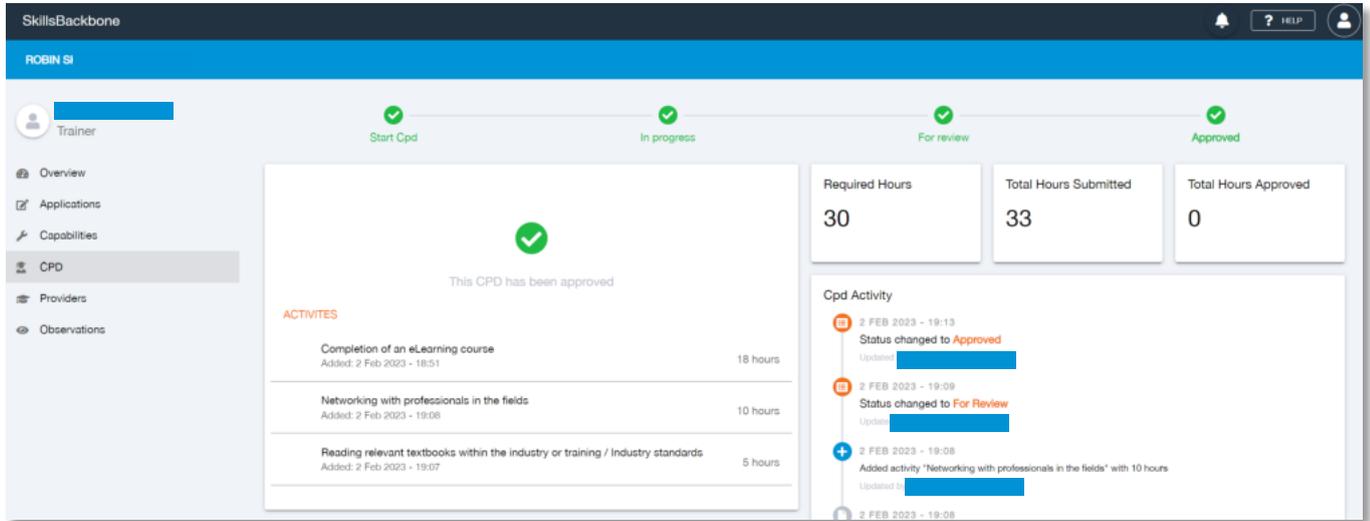


If it has been accepted, you will get a green submitted message at the bottom of the screen.

You will notice that the time bar along the top of the screen is now set as For Review.



An NSAR team member will then review your submitted CPD. Once reviewed and completed your screen will show that your CPD has been approved.



The dashboard shows the following summary statistics:

Category	Value
Required Hours	30
Total Hours Submitted	33
Total Hours Approved	0

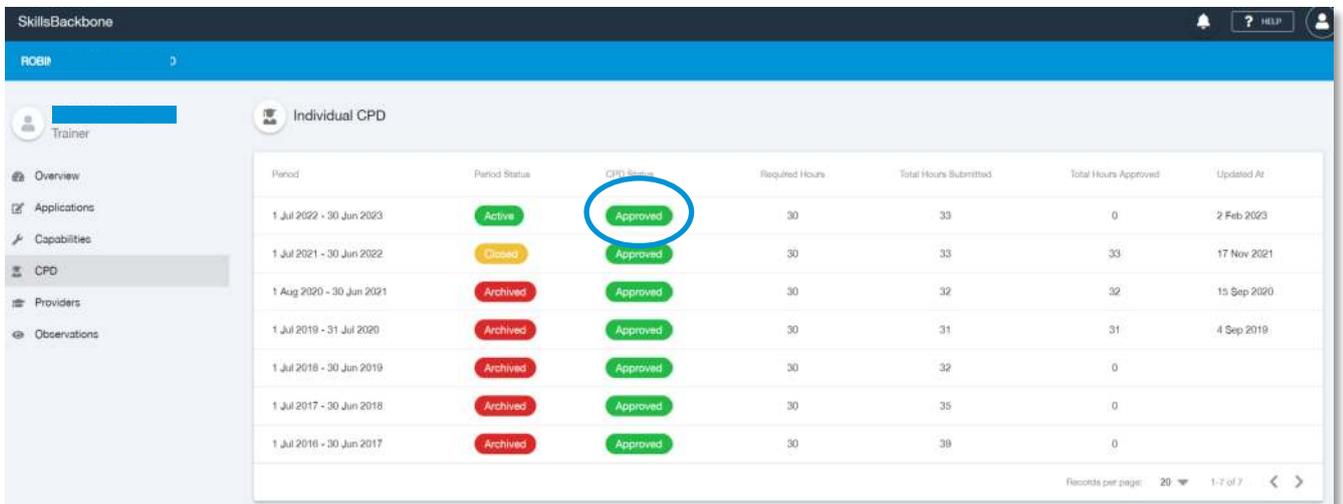
**ACTIVITIES**

Activity	Hours
Completion of an eLearning course Added: 2 Feb 2023 - 18:51	18 hours
Networking with professionals in the fields Added: 2 Feb 2023 - 19:08	10 hours
Reading relevant textbooks within the industry or training / Industry standards Added: 2 Feb 2023 - 19:07	5 hours

**Cpd Activity Log:**

- 2 FEB 2023 - 19:13: Status changed to **Approved**
- 2 FEB 2023 - 19:09: Status changed to **For Review**
- 2 FEB 2023 - 19:08: Added activity "Networking with professionals in the fields" with 10 hours
- 2 FEB 2023 - 19:08: [Activity]

The CPD over view page will also show that the CPD for the year has been reviewed and approved.



Period	Period Status	CPD Status	Required Hours	Total Hours Submitted	Total Hours Approved	Updated At
1 Jul 2022 - 30 Jun 2023	Active	Approved	30	33	0	2 Feb 2023
1 Jul 2021 - 30 Jun 2022	Closed	Approved	30	33	33	17 Nov 2021
1 Aug 2020 - 30 Jun 2021	Archived	Approved	30	32	32	15 Sep 2020
1 Jul 2019 - 31 Jul 2020	Archived	Approved	30	31	31	4 Sep 2019
1 Jul 2018 - 30 Jun 2019	Archived	Approved	30	32	0	
1 Jul 2017 - 30 Jun 2018	Archived	Approved	30	35	0	
1 Jul 2016 - 30 Jun 2017	Archived	Approved	30	39	0	

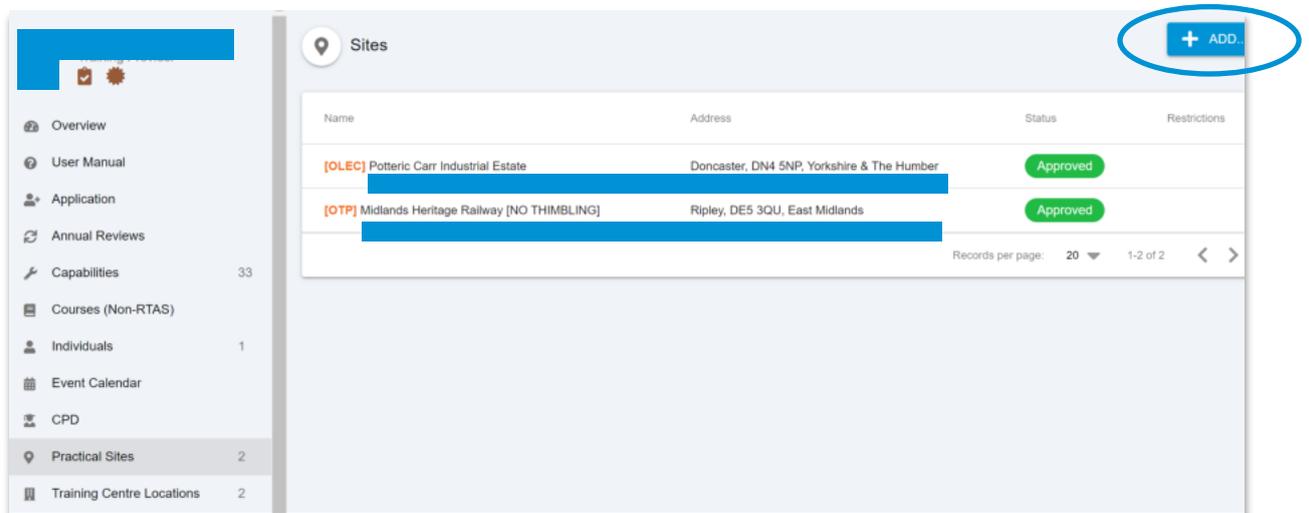
Records per page: 20 | 1-7 of 7

## 9. Practical Sites

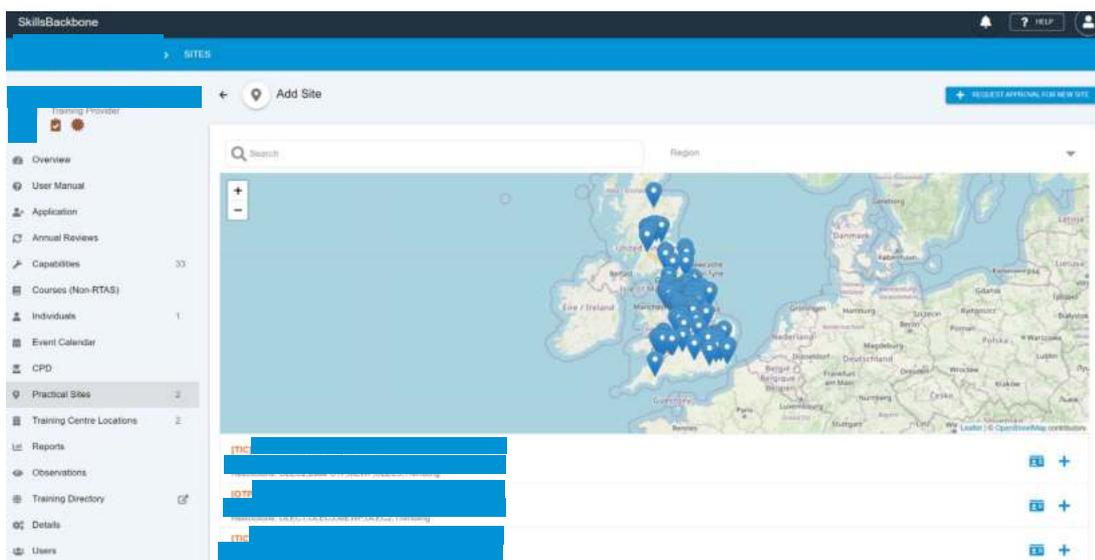
This area of the system is dedicated to practical sites which required NSAR approval i.e. OTP, TIC and OLEC sites.

The initial view defaults to the list of approved sites for the provider, their status and any restrictions of the site.

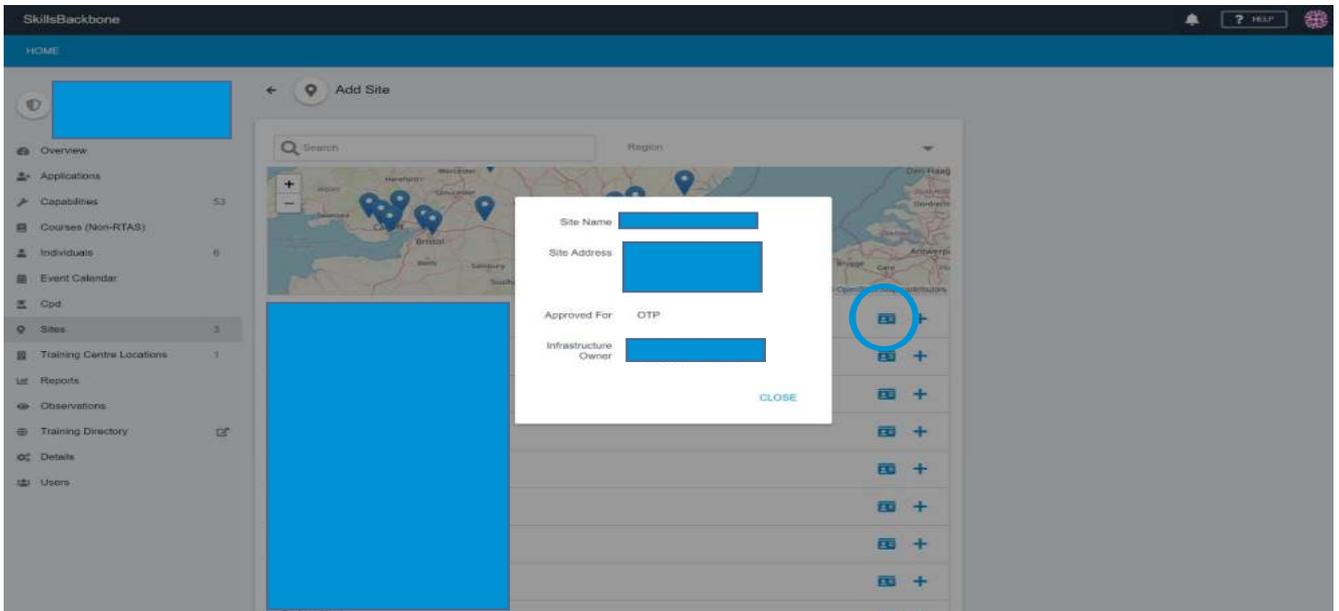
In order to view all approved sites and/or add approvals for the provider click the **BUTTON** in the top right-hand corner of the page.



This then opens the list of Approved sites registered with NSAR. If the site you are looking for is not there and you believe that it is NSAR approved you must contact NSAR via Freshdesk for more information.

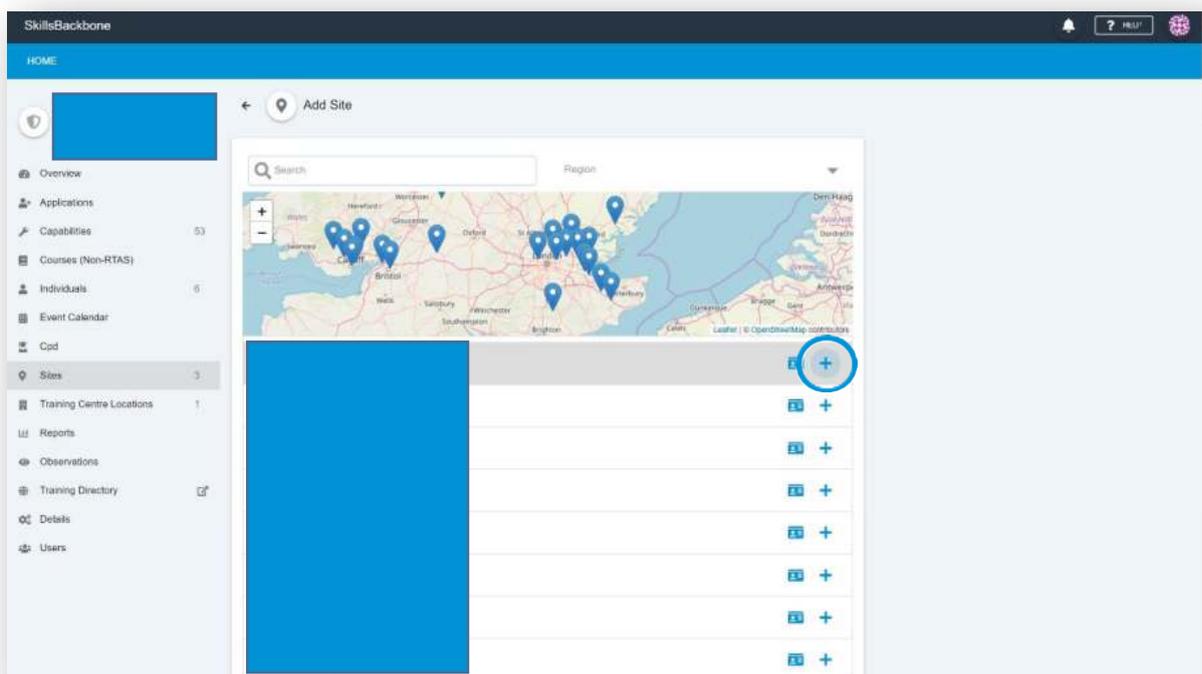


To view more details about that site use the **BUSINESS CARD ICON** at the right hand side of the site name.

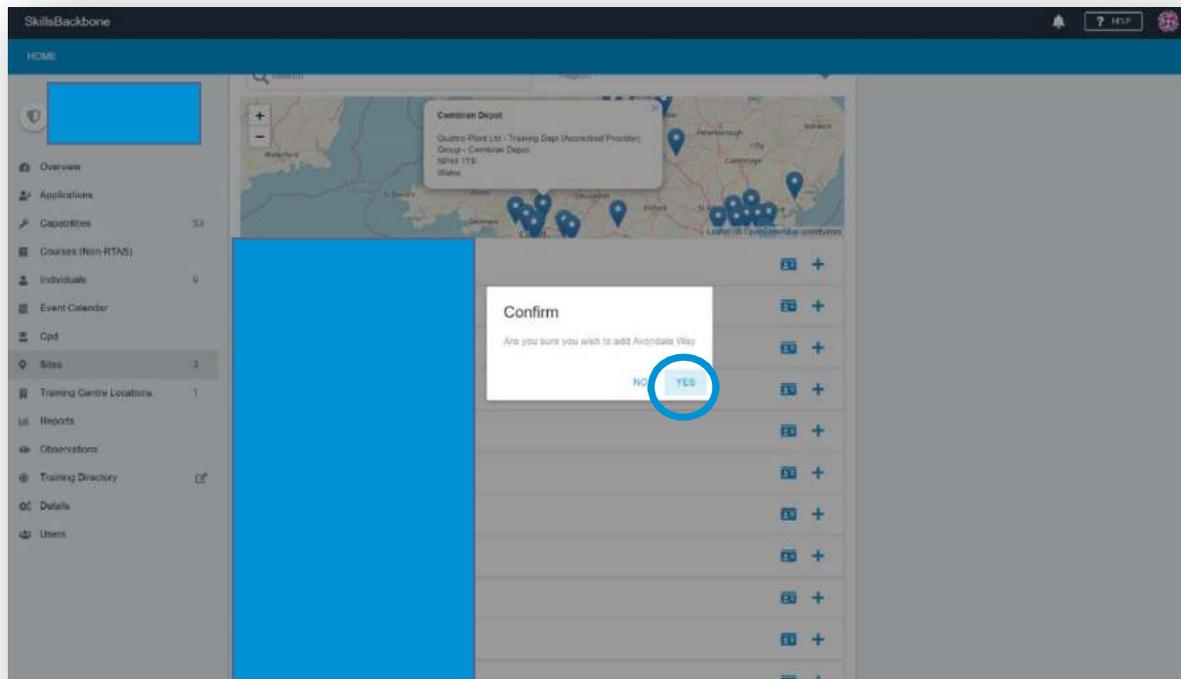


### 9.1. Approval to use an existing approved site

To become approved to use an existing approved site, you must contact the details registered on the above screen to request authority and a letter of approval. Once you have this you can apply to be registered as a provider approved to use that site. To do this you can either use the **+** icon against the site or click on the **flag** in the map.

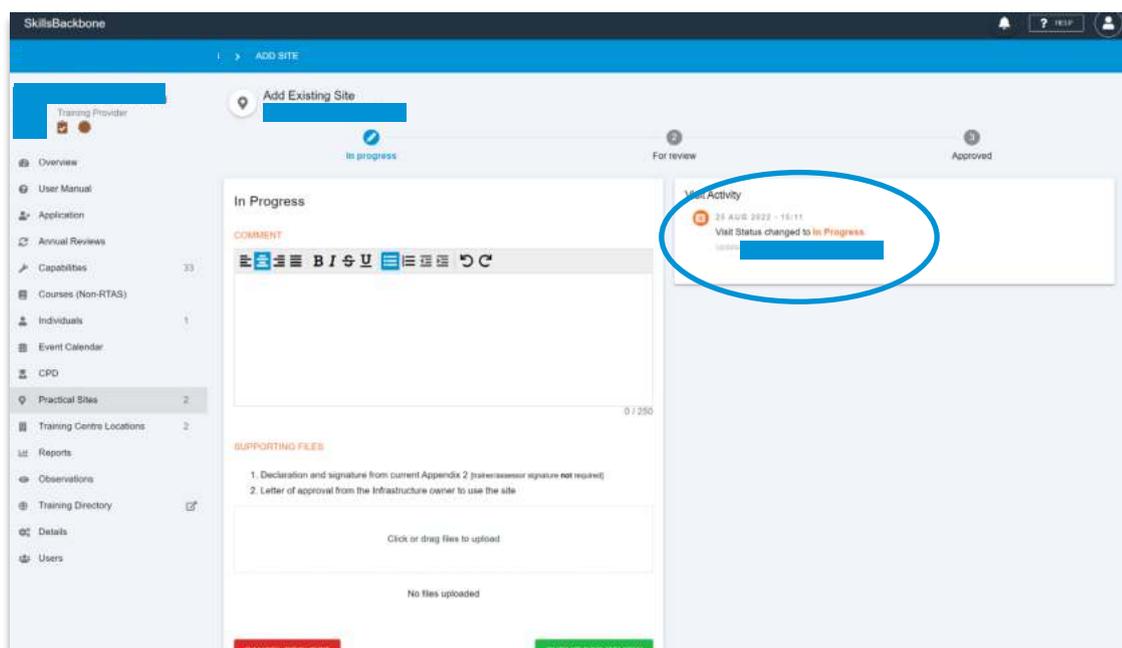


The system will then ask for confirmation that you request to be added to this site.

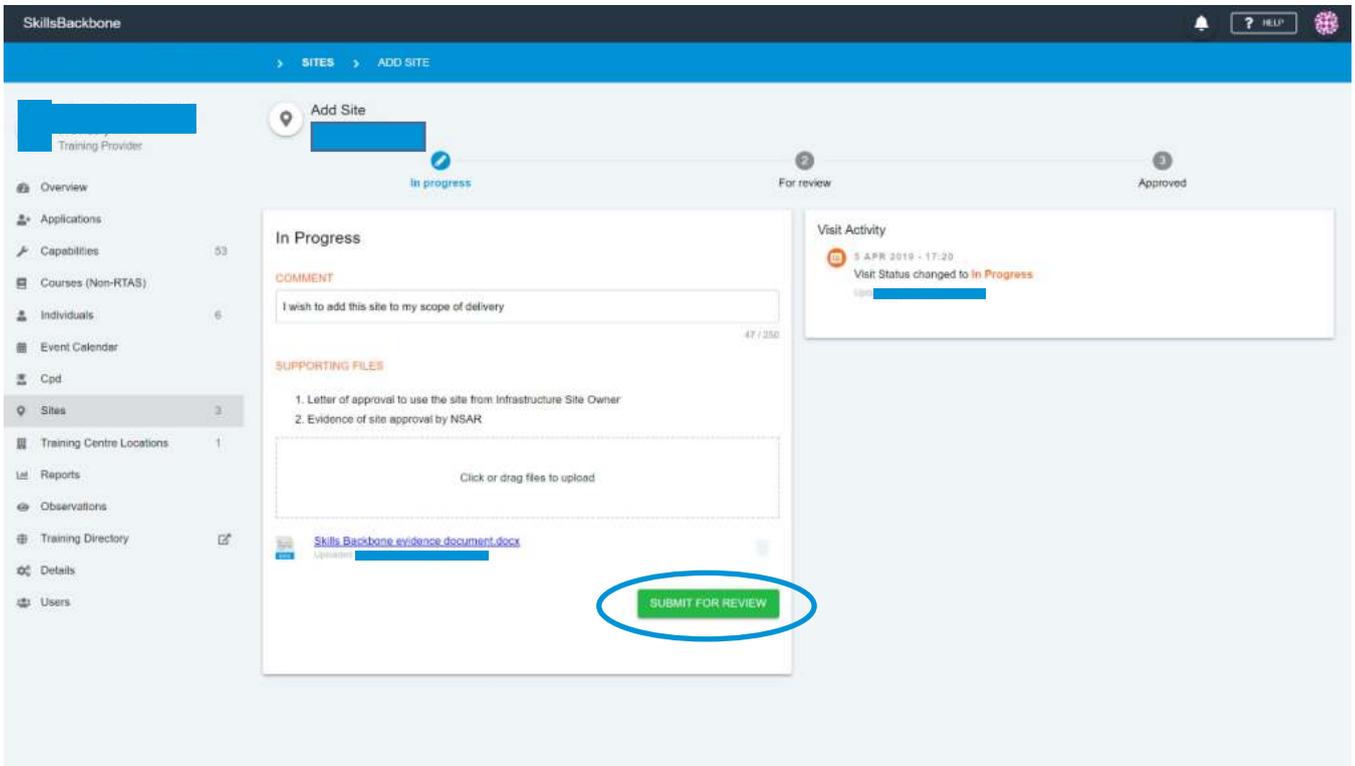
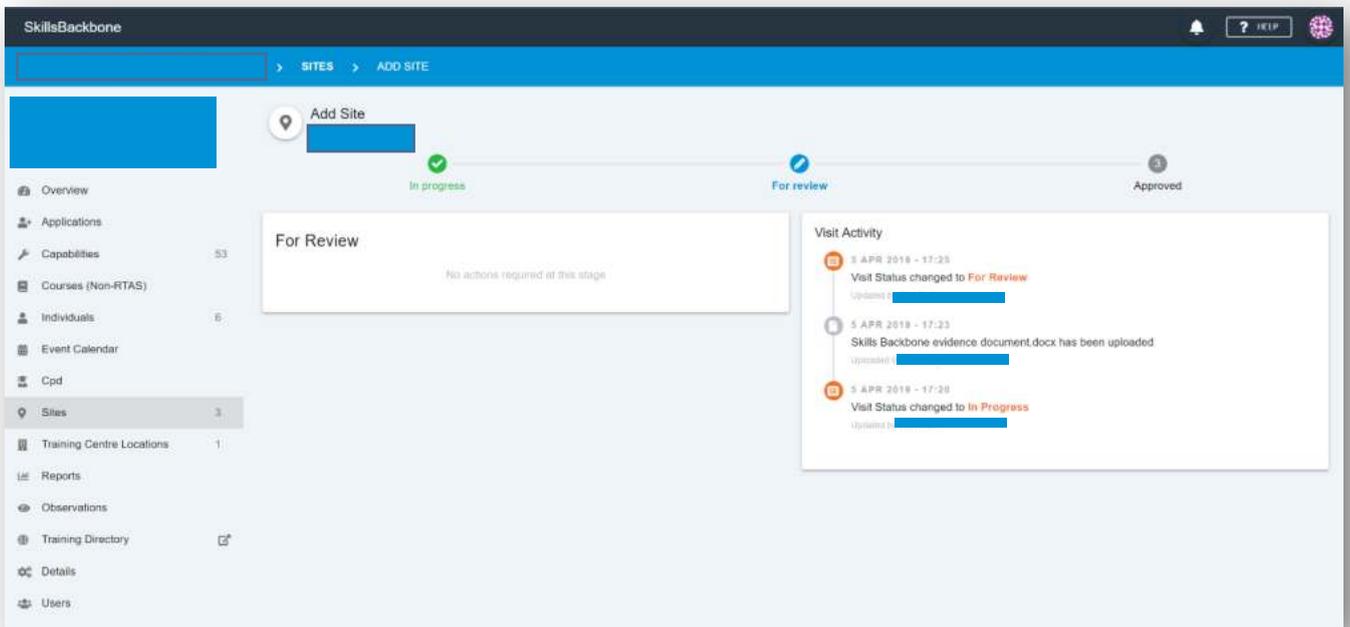


The system will open a simplified application page to provide comment and upload supporting letters of approval.

Complete the form and upload the evidence is the same way as described earlier in this manual and then **SUBMIT FOR REVIEW**

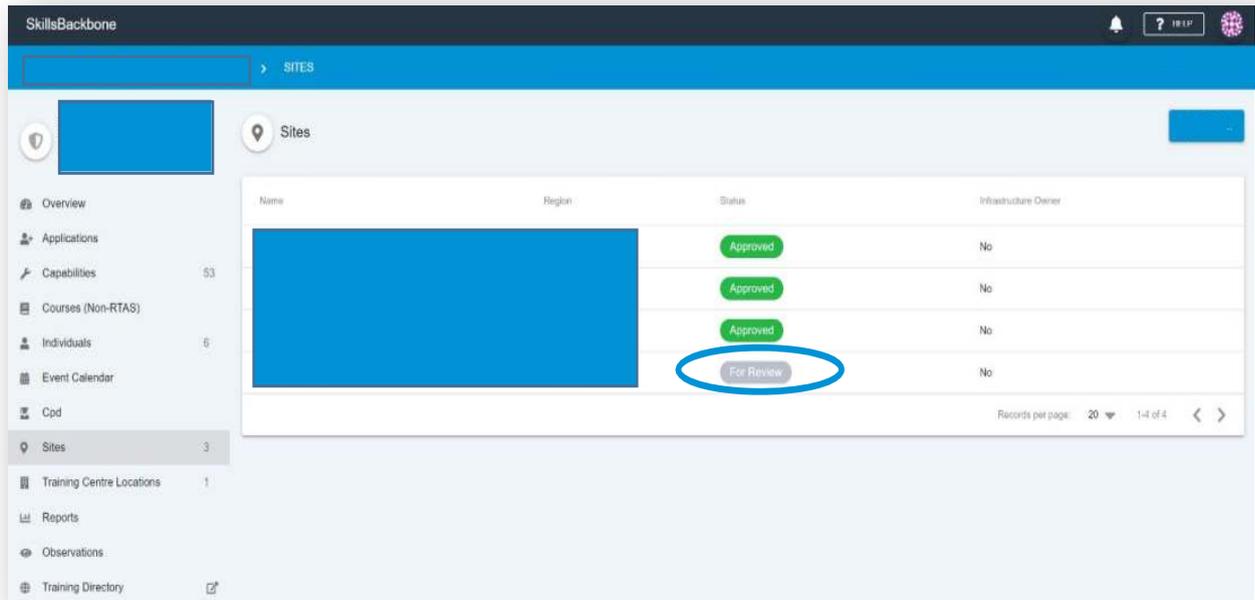


This will then be sent to NSAR for QA Team approval. The **visit** activity timeline starts to record the progress of your application.

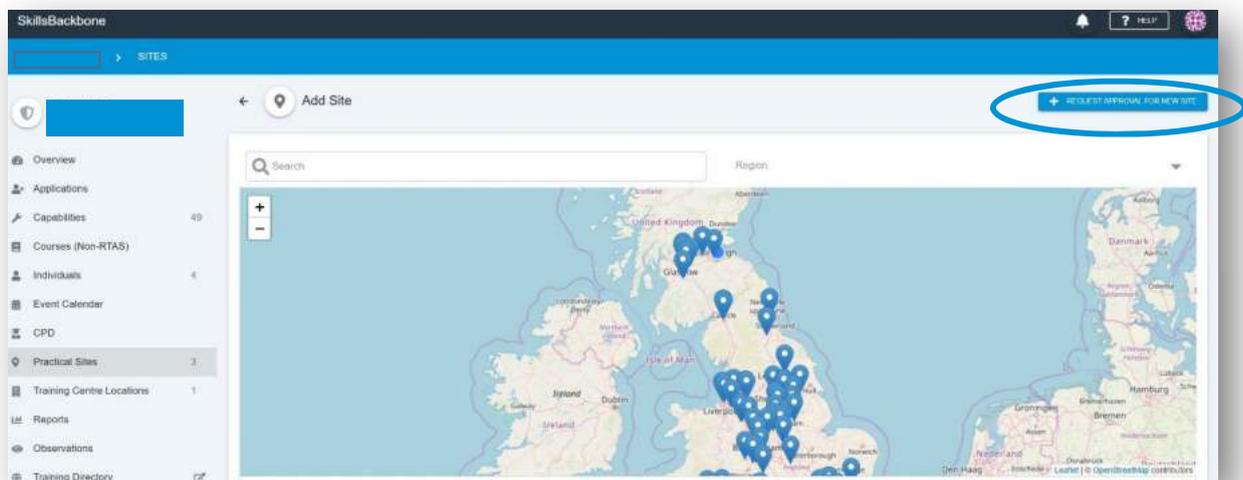
When NSAR takes action on your application you will be able to track its approval progress as it will be displayed on your site summary list.

To check the detail of progress being made click on the status button which takes you to the detail screen below.

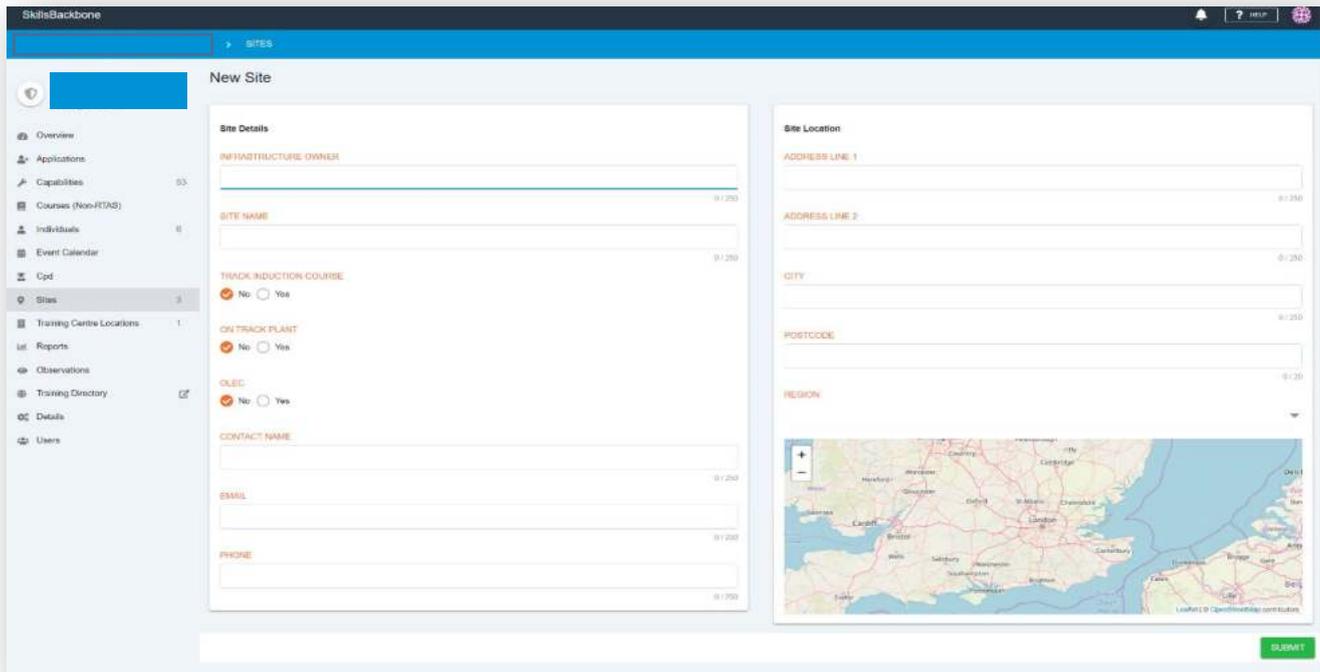


## 9.2. Requesting approval for a NEW site

To request a site approval visit to add a site to the NSAR register of approved sites click the **REQUEST APPROVAL FOR A NEW SITE**



Clicking on this will open up a detailed registration form for completion.



**Site Details**

INFRASTRUCTURE OWNER

SITE NAME

TRACK INDUCTION COURSE  
 No  Yes

ON TRACK PLANT  
 No  Yes

OLEC  
 No  Yes

CONTACT NAME

EMAIL

PHONE

**Site Location**

ADDRESS LINE 1

ADDRESS LINE 2

CITY

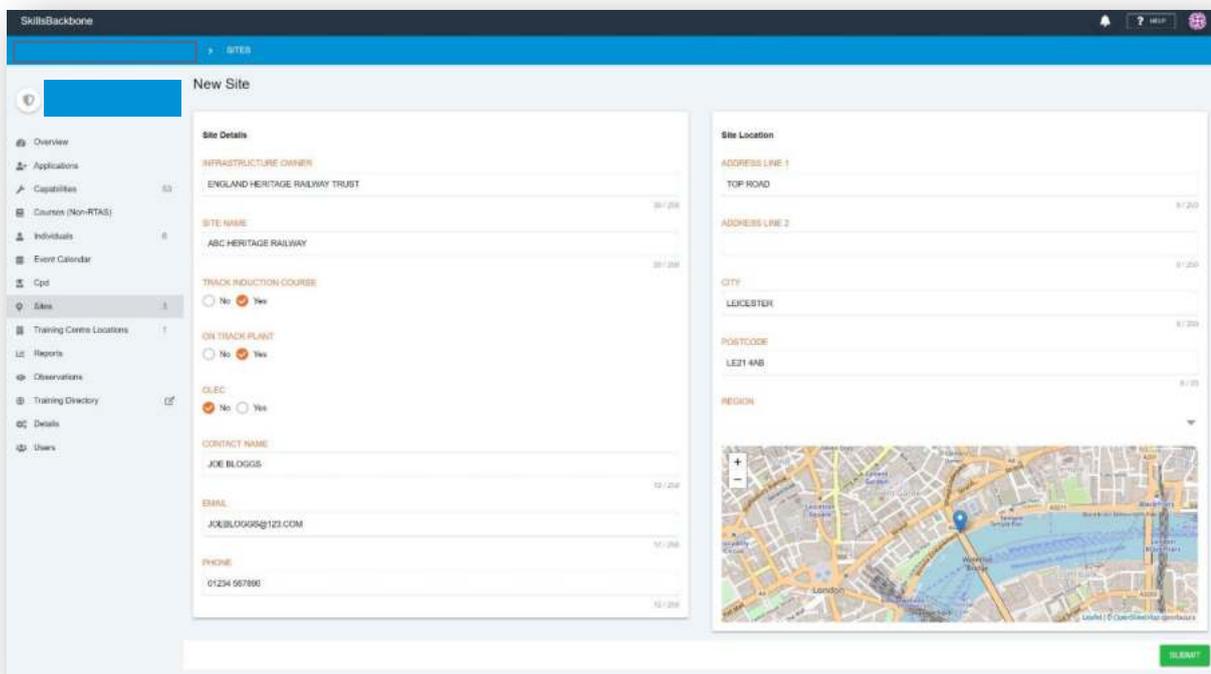
POSTCODE

REGION

Map showing the United Kingdom.

**SUBMIT**

Add all details requested and **SUBMIT**. All fields must be populated before the system will accept your submission.



**Site Details**

INFRASTRUCTURE OWNER  
ENGLAND HERITAGE RAILWAY TRUST

SITE NAME  
ABC HERITAGE RAILWAY

TRACK INDUCTION COURSE  
 No  Yes

ON TRACK PLANT  
 No  Yes

OLEC  
 No  Yes

CONTACT NAME  
JOE BLOGGS

EMAIL  
JOEBLOGGS@123.COM

PHONE  
01234 567890

**Site Location**

ADDRESS LINE 1  
TOP ROAD

ADDRESS LINE 2

CITY  
LEICESTER

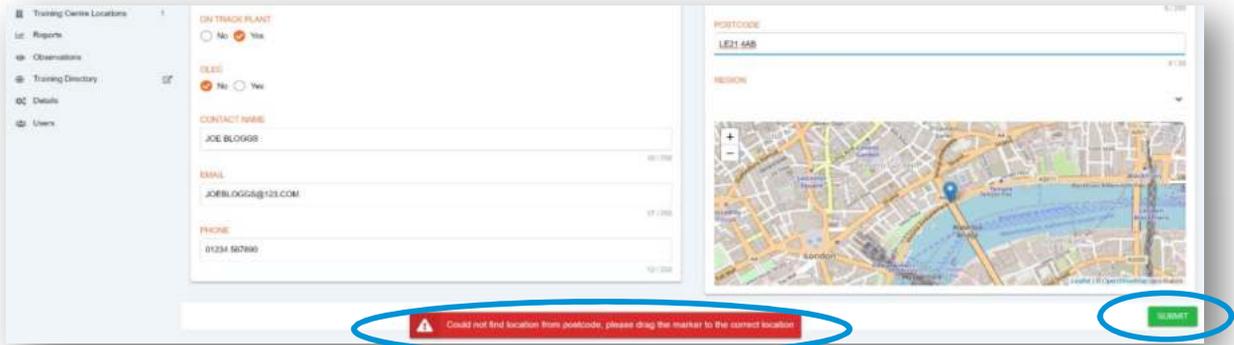
POSTCODE  
LE11 4AB

REGION

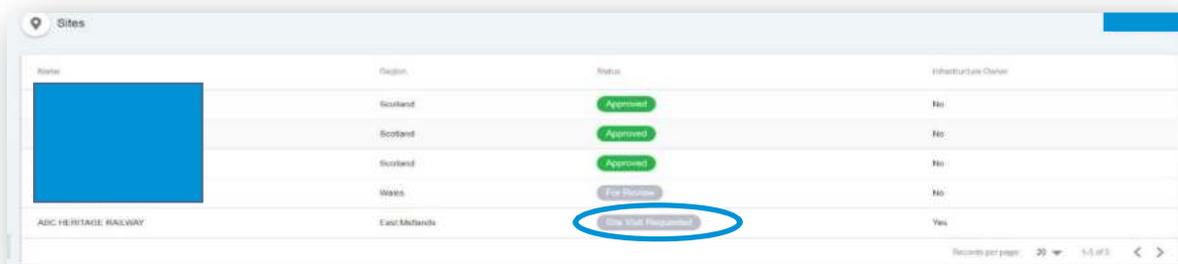
Map showing Leicester, UK.

**SUBMIT**

When entering the postcode, the region and the map will update automatically. If the postcode is not a valid postcode the system will alert you to this and not progress any further.

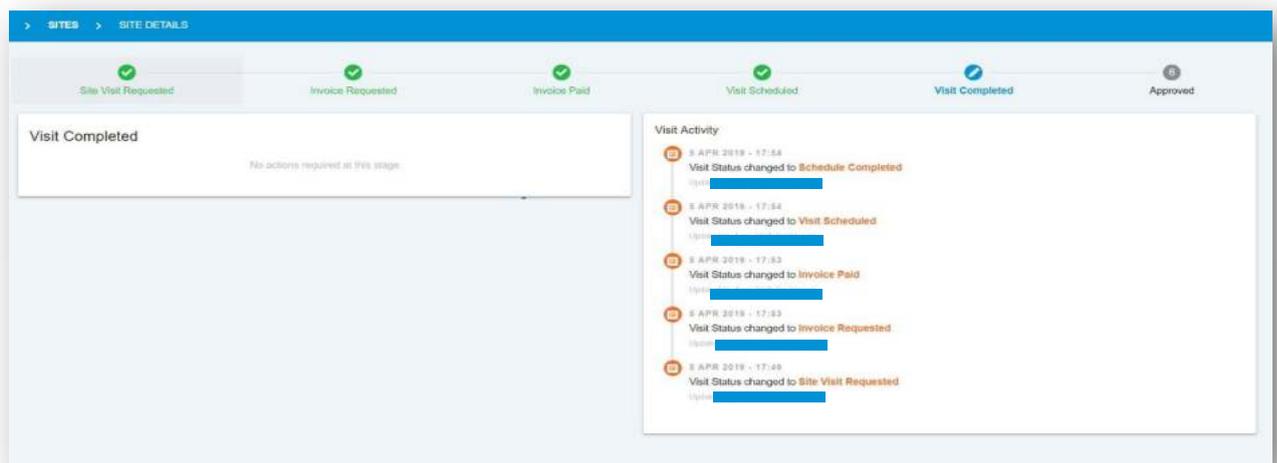


Once **submitted** the site request will appear on the summary list of sites on the main list.



Name	Region	Status	Infrastructure Owner
[Redacted]	Scotland	Approved	No
[Redacted]	Scotland	Approved	No
[Redacted]	Scotland	Approved	No
[Redacted]	Wales	For Review	No
ADIC HERITAGE RAILWAY	East Midlands	Click Visit / Reopen	Yes

When NSAR takes action on your request you will be able to track its progress by viewing the visit activity within the detail of the site accessible by clicking on it. You can also see its progress status on your summary site list



**SITES > SITE DETAILS**

Site Visit Requested  Invoice Requested  Invoice Paid  Visit Scheduled  Visit Completed  Approved

**Visit Completed**

No actions required at this stage

**Visit Activity**

- 5 APR 2018 - 17:54 Visit Status changed to Schedule Completed
- 5 APR 2018 - 17:54 Visit Status changed to Visit Scheduled
- 5 APR 2018 - 17:53 Visit Status changed to Invoice Paid
- 5 APR 2018 - 17:53 Visit Status changed to Invoice Requested
- 5 APR 2018 - 17:48 Visit Status changed to Site Visit Requested

Sites

Name	Region	Status	Infrastructure Done?
[Redacted]	Scotland	Approved	No
[Redacted]	Scotland	Approved	No
[Redacted]	Scotland	Approved	No
[Redacted]	Wales	For Review	No
ABC HERITAGE RAILWAY	East Midlands	Visit Completed	Yes

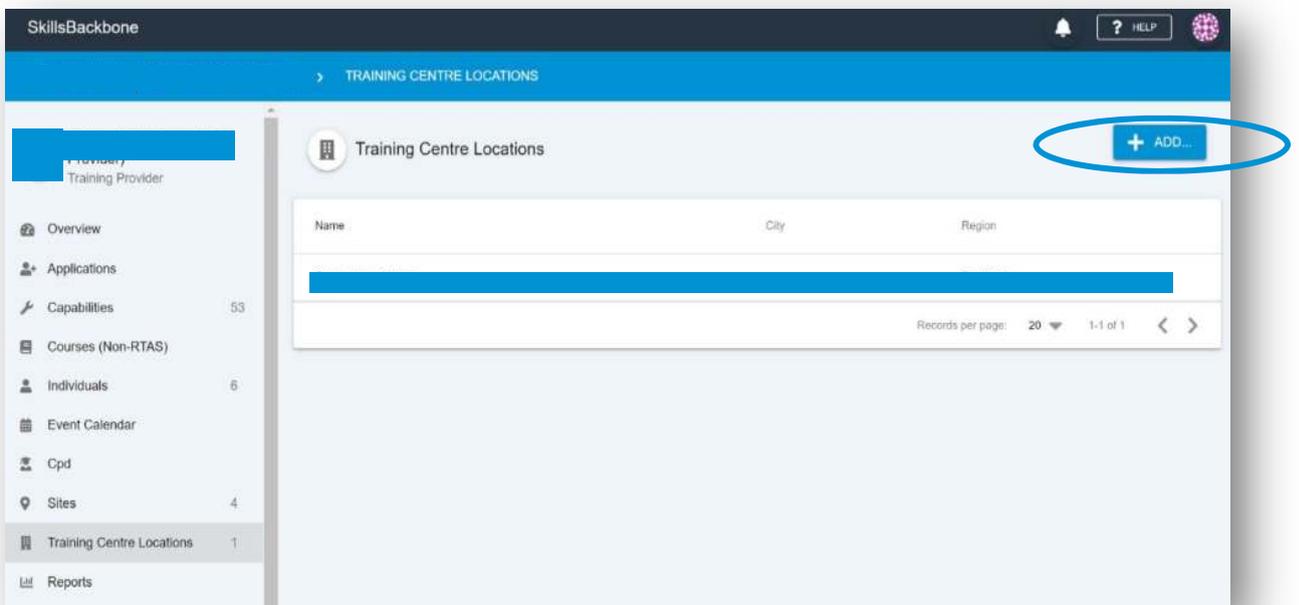
Records per page: 20

## 10. Training Centre Locations

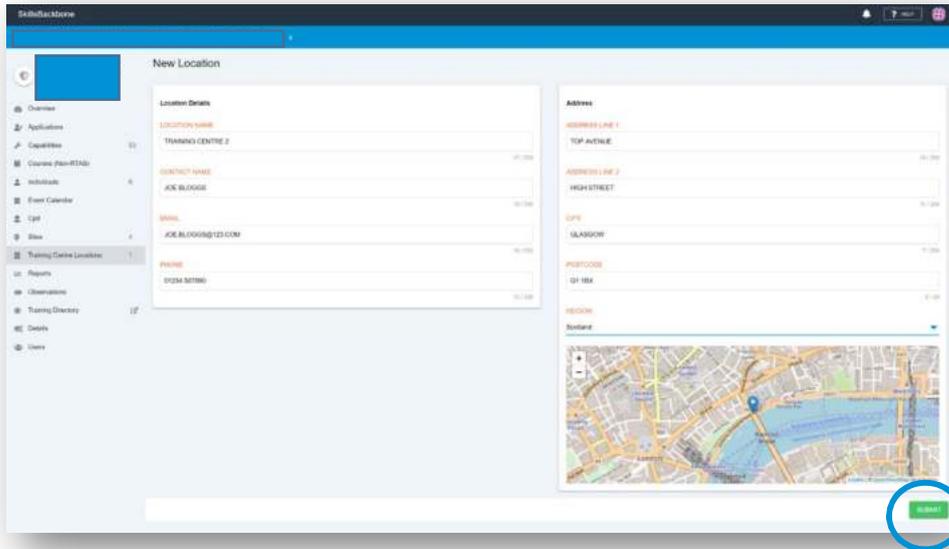
This section of your site allows you to keep your training centre locations up to date which are needed to accurately record the location of training being notified into the events calendar. The location must be in this list for it to be selectable from the drop-down menu in the Events Calendar classroom location. You must also inform NSAR and update Sentinel with any main address details.

### 10.1. Adding a Training Centre location

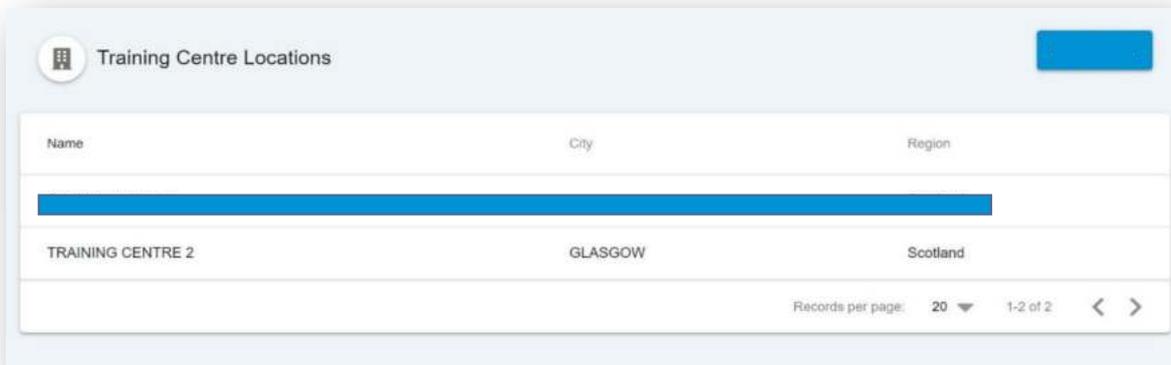
To add a new office, use the blue bottom in the top right-hand corner of the page.



Complete all fields of the address form and **SUBMIT**

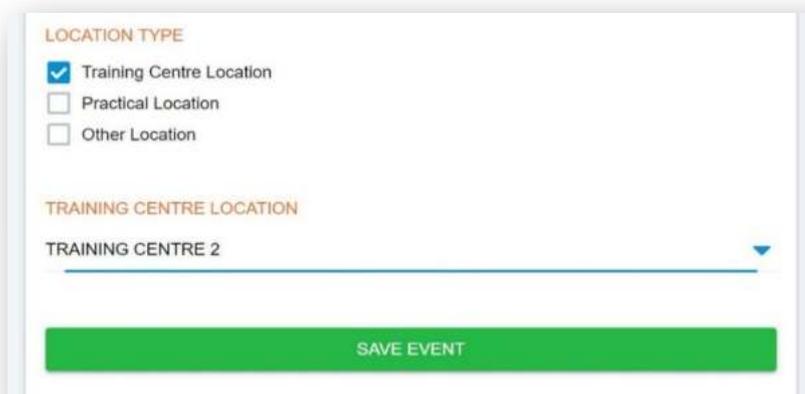


Your additional training centre location is then added to your summary list and will appear in your classroom location drop down menu on the event calendar.



Name	City	Region
TRAINING CENTRE 2	GLASGOW	Scotland

Records per page: 20 1-2 of 2



**LOCATION TYPE**

- Training Centre Location
- Practical Location
- Other Location

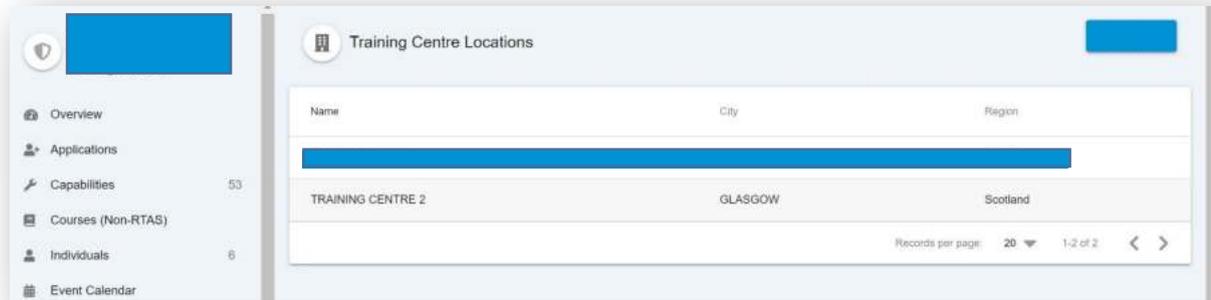
**TRAINING CENTRE LOCATION**

TRAINING CENTRE 2

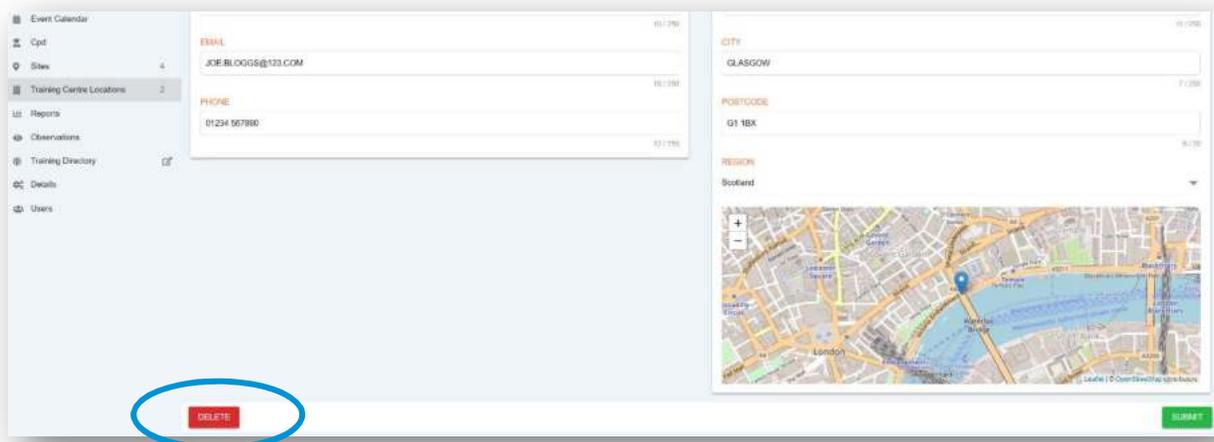
SAVE EVENT

## 10.2. Removing a Training Centre location

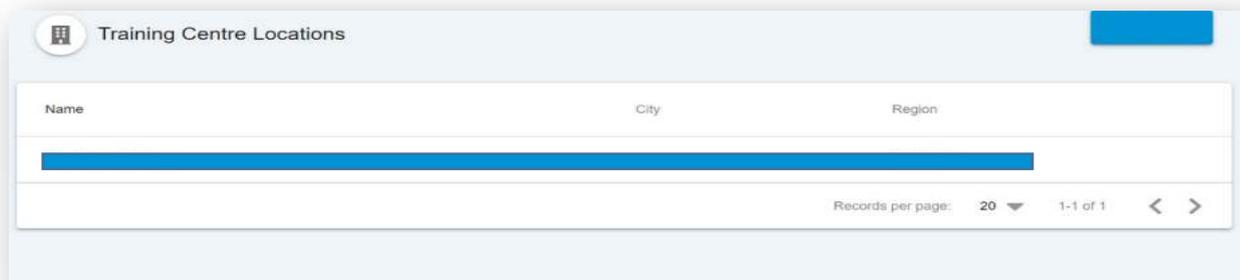
To remove a location, click on the location from your summary list to open the detail.



This will open the address input detail page – note there is now a **DELETE** button in the bottom left-hand corner of the page.

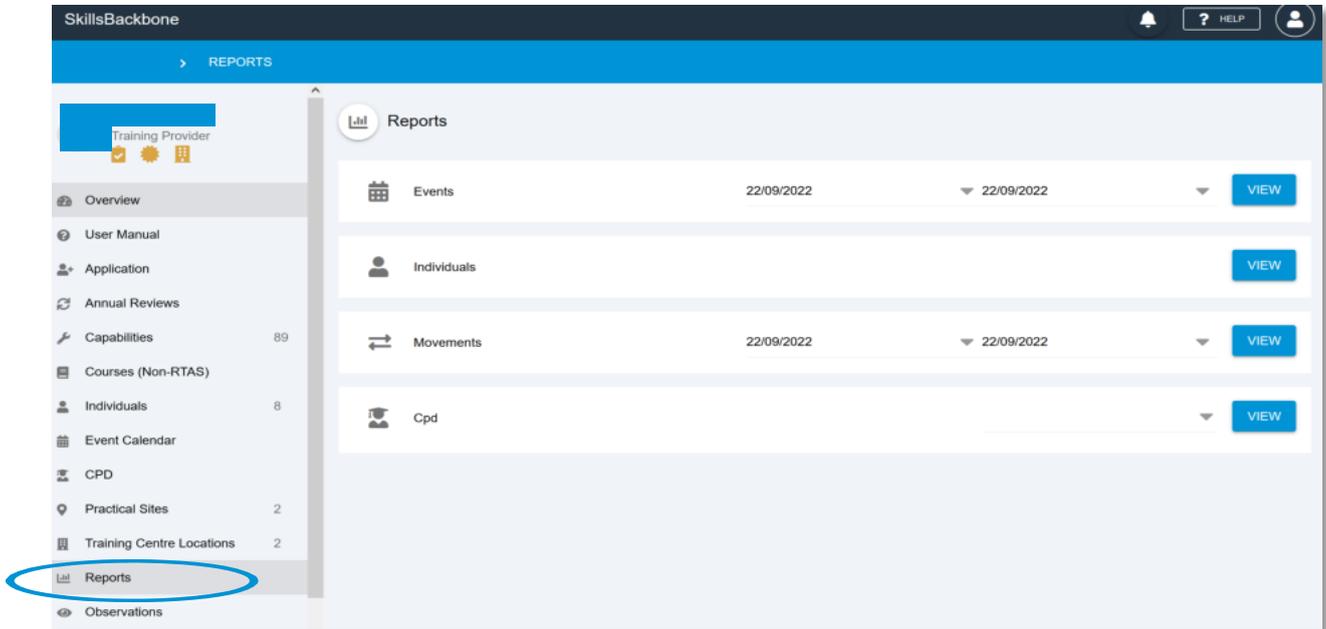


Click the **DELETE** button. This will then remove the location and return you to the location list page. Note the classroom location has been removed from the list.

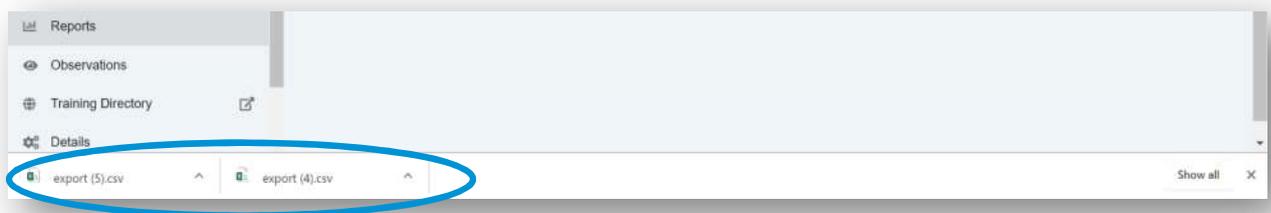


## 11. Reports

There are 4 reports which a training provider can run for their operations. These reports are simplistic in their design to select parameters of information that you want to report on and then select **VIEW**



This will export the data that you have asked for in to .csv workbook for your own further reporting of the data outside of the Skills Backbone. This will appear in the way which is normal for the web browser you are using. You can then present any data that you wish to from filtering the data inside the Excel software.



The CPD report allows you to select the CPD year you wish see all data on.

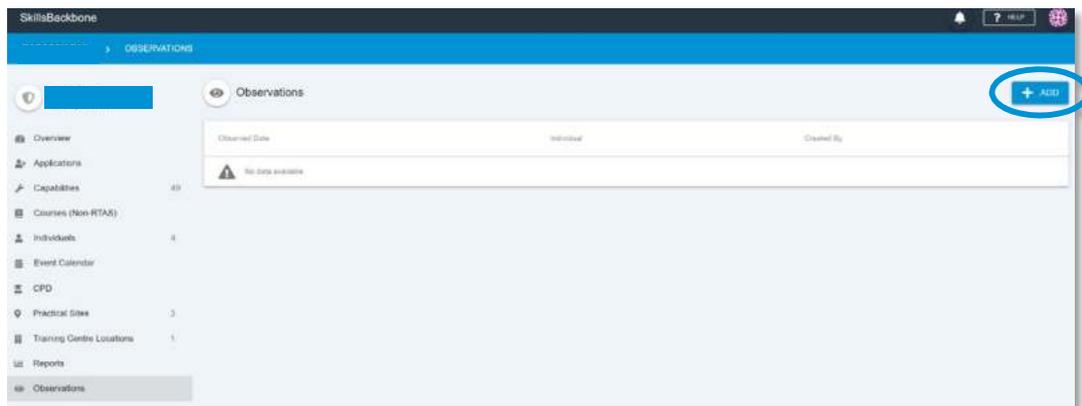


## 12 Observations

The Observations section of the system is where observations carried out of a trainer/assessor are uploaded by administrators. Observations completed and uploaded by NSAR can also be viewed.

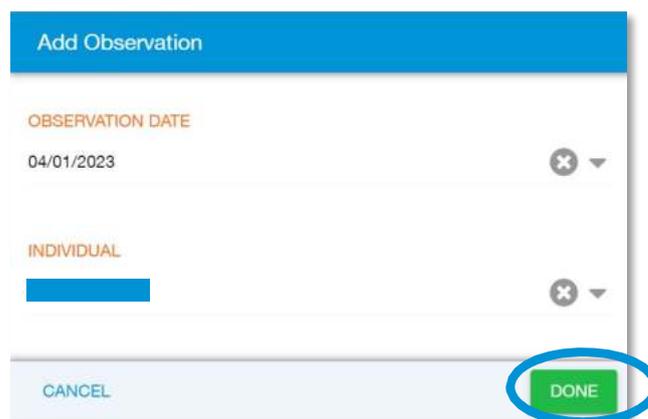
### 12.1. Adding an Observation

To add an Observation, use the **+ADD** button at the top right-hand corner.

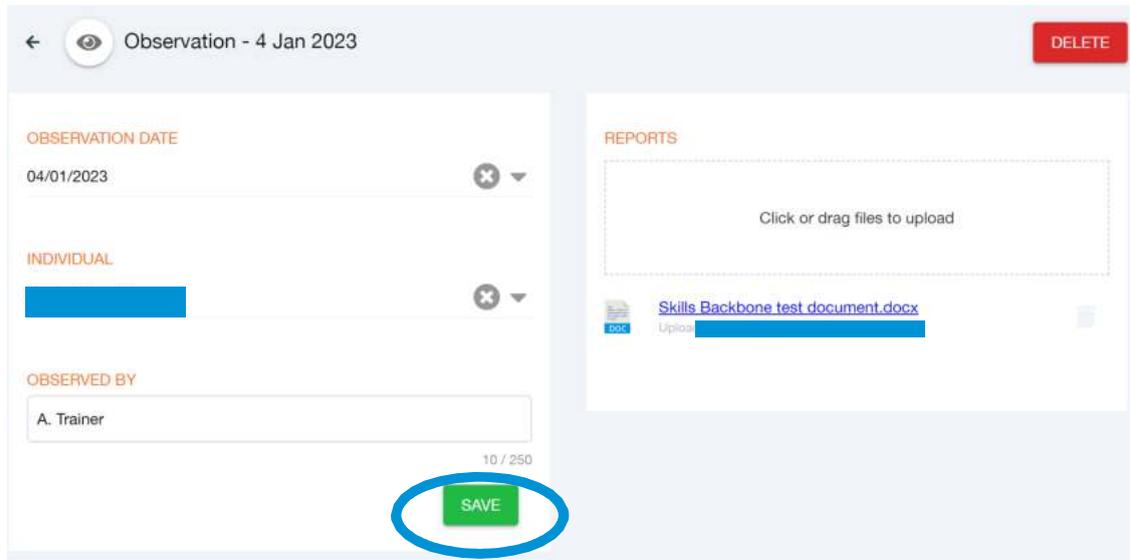


This then opens a window for you to add the observation date and the trainer/assessor observed [selected from a drop-down menu showing only the trainer/assessors assigned to you].

When finished click **DONE**



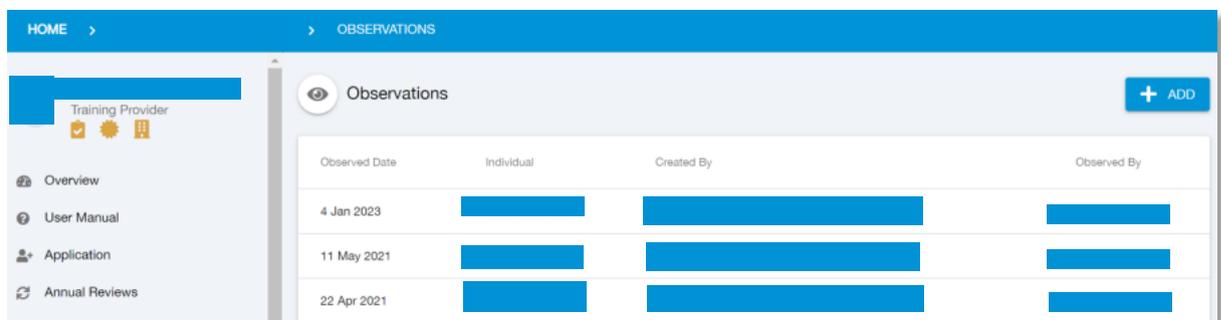
This takes you the upload page where you can attach the observation report completed and type in the name of the observer.



If you want to remove the entry you can **DELETE**

When you are finished, and all is correct then **SAVE**. The system will confirm the changes in the pop-up notification which will disappear after a few seconds

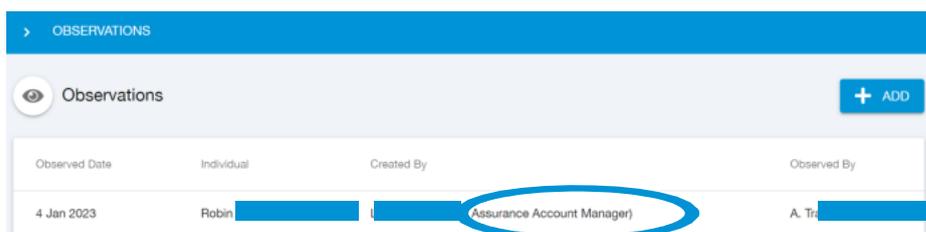
The upload is then added to the list of observations in the main observation's summary screen



Observed Date	Individual	Created By	Observed By
4 Jan 2023	[Redacted]	[Redacted]	[Redacted]
11 May 2021	[Redacted]	[Redacted]	[Redacted]
22 Apr 2021	[Redacted]	[Redacted]	[Redacted]

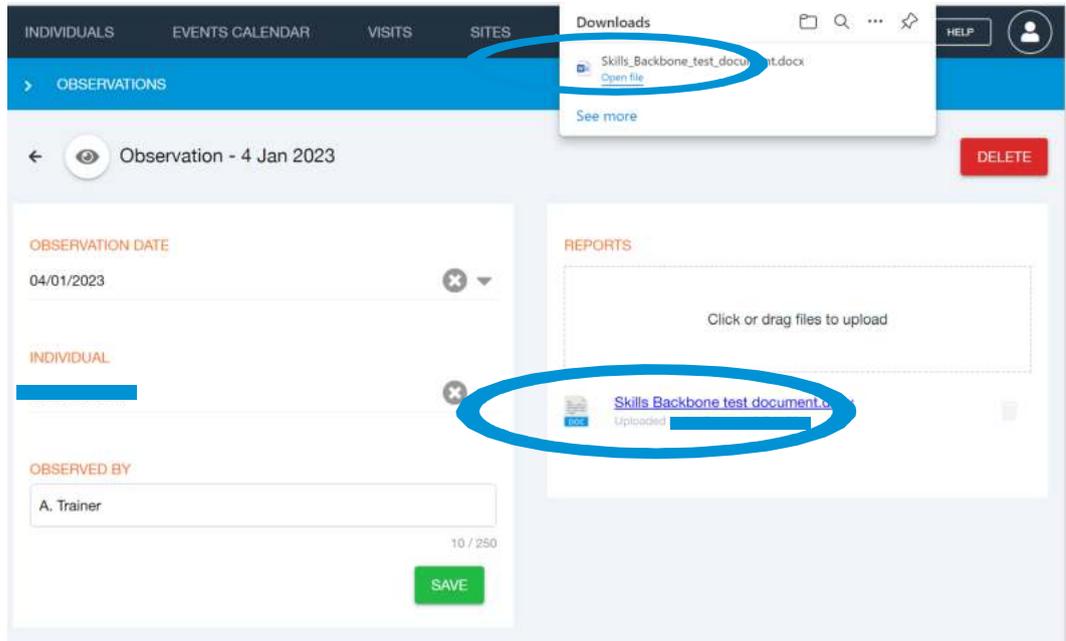
## 12.2. Viewing an Observation

Independent Observations completed by NSAR will also be uploaded and will appear in your main Observations summary screen.



Observed Date	Individual	Created By	Observed By
4 Jan 2023	Robin [Redacted]	[Redacted] Assurance Account Manager)	A. Tr [Redacted]

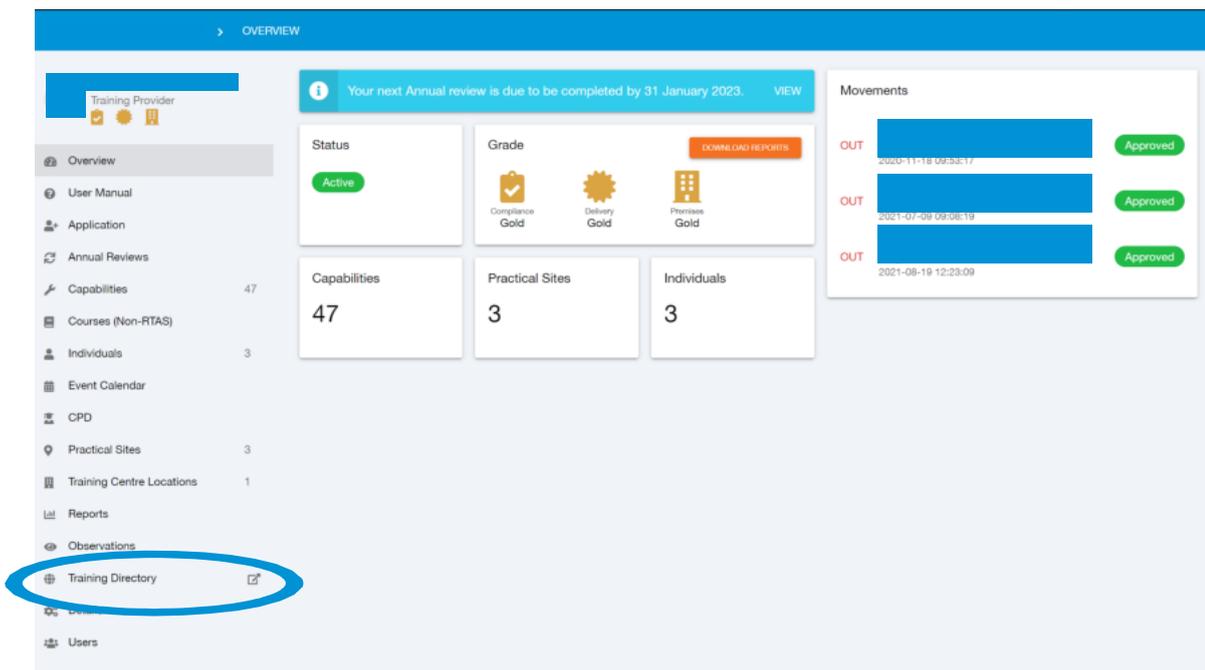
To **view** an observation uploaded by NSAR, click on the Observation entry that you want to see. This will open the observation detail. Click on the document uploaded which will then download to your computer.



### 13. Training Directory

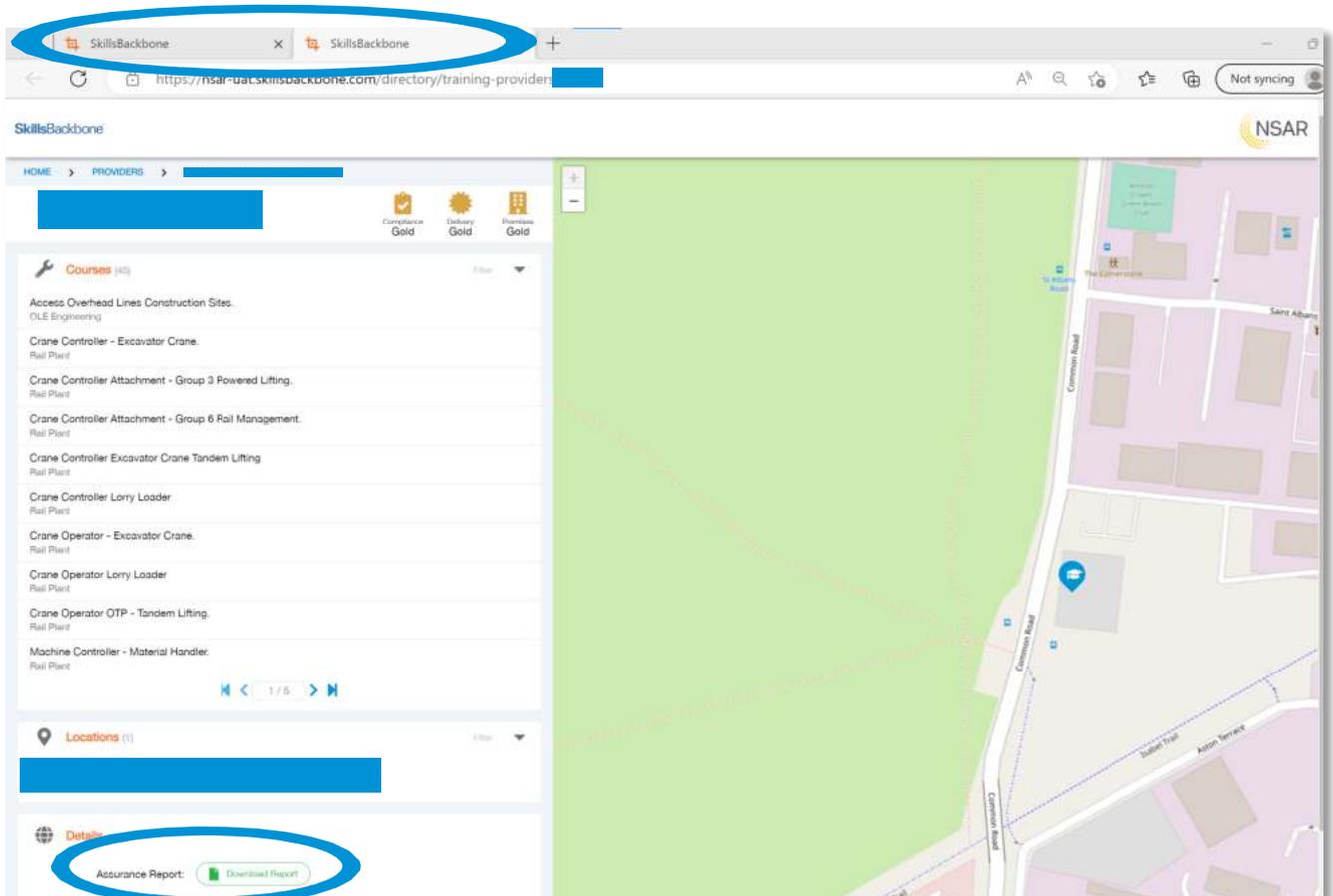
The Training directory is accessible from your own log in to the system.

**NOTE:** When you click on this shortcut on the left-hand side of the screen the Directory opens in an additional web-browser window as the Training Directory is a public website, this is indicated by the icon within the title on the short-cut left-hand bar.



### 13.1. Providers page

When you click on the Training Directory the view will default to your own, including the map, and is as the public see your page within the Directory. It lists the RTAS Courses which you deliver, your locations and additional details including your current Assurance Report.



The details section will show any additional details which you add to your profile through the Details tab of your portal.

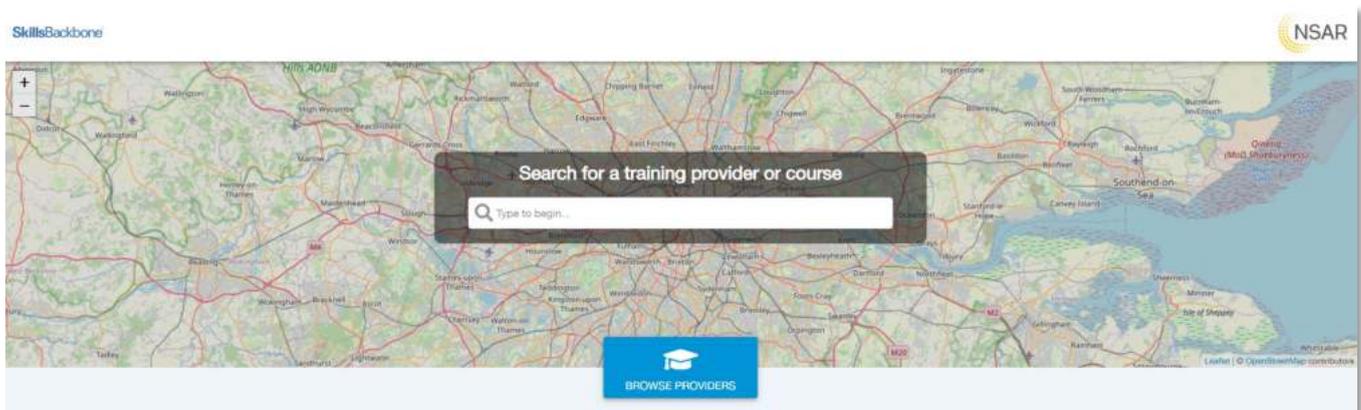
**Note:** That the **HOME** button on this page is the 'home' of the public Training Directory website and not your own provider 'home'. To get back to your own Skills Backbone portal you must close the secondary window, your Skills Backbone portal window is still open unless you have closed it for any reason.

## 13.2. Using the Training Directory

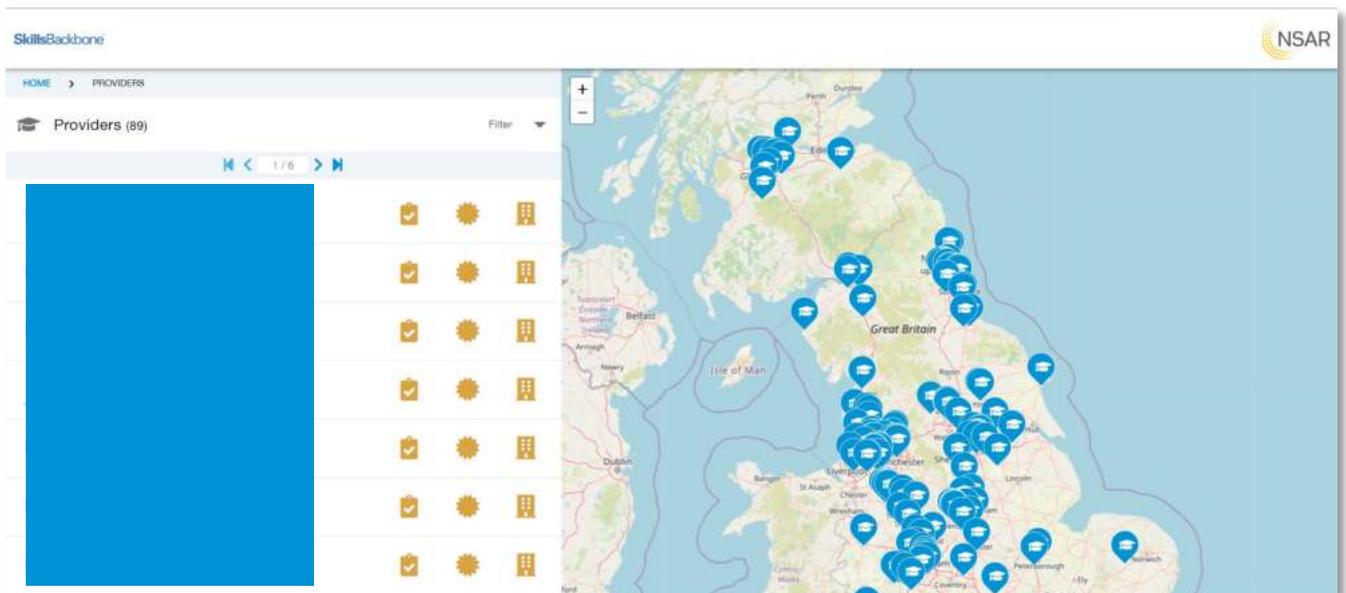
To use the Directory to view all information, click [HOME](#)



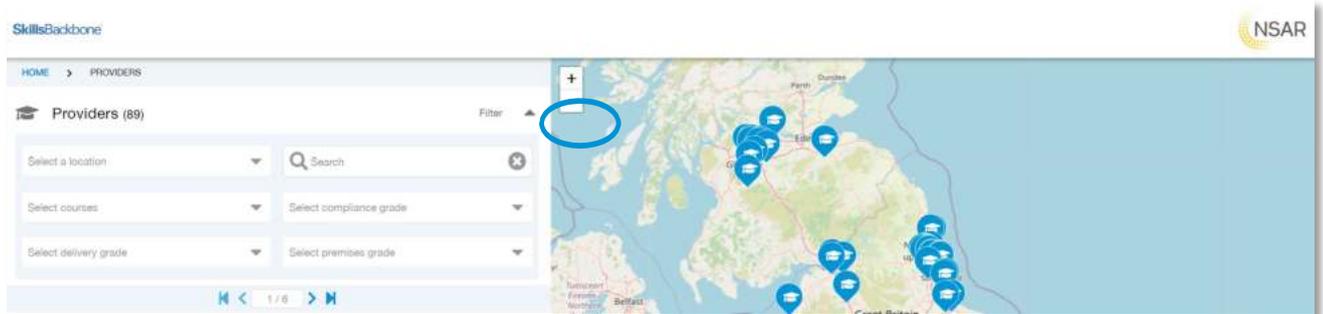
This takes you to the landing page of the public Training Directory website where you can search for specific providers or courses by name, you can also Browse Providers.



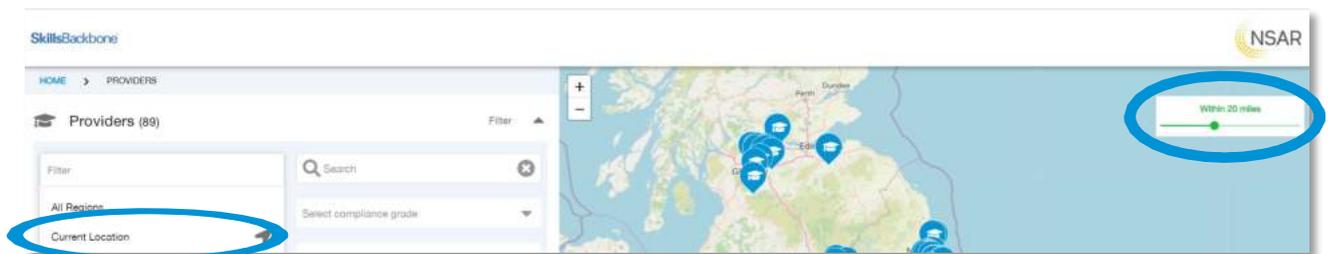
When this link is selected it opens an alphabetical list of all NSAR Assured Providers, their Grade and the number of locations that they have.



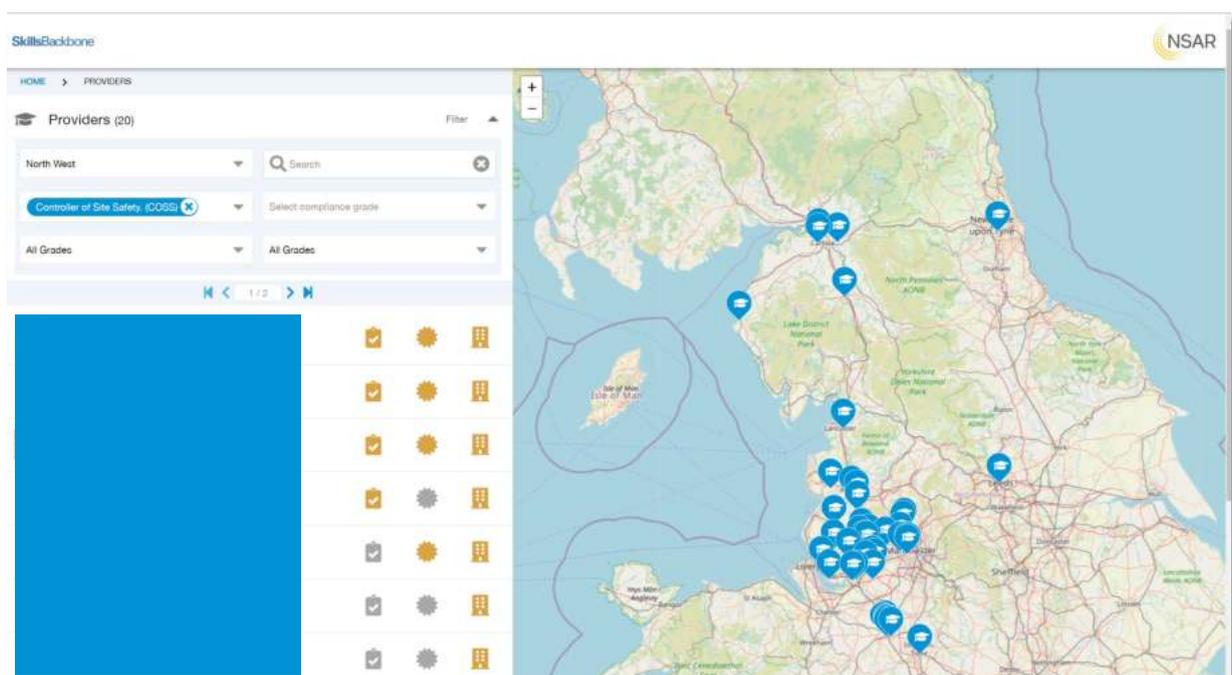
To refine your search use the **FILTER** button and add in what refinements to the search that you wish to make.



The location can use your current location. You can also define the **search distance** around a location that you enter so that you can tailor to your preference what geographical area you are looking for by using the **Within xx miles** tool bar on the map.

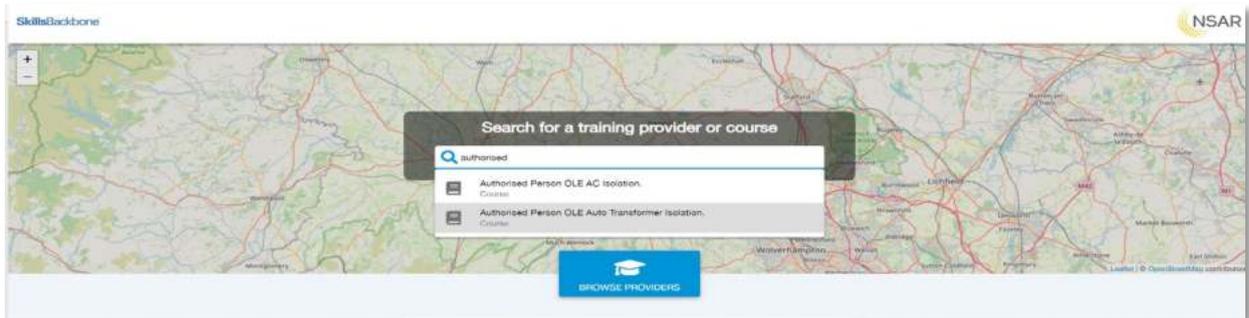


Doing this then automatically returns the providers which match the search criteria you have given.



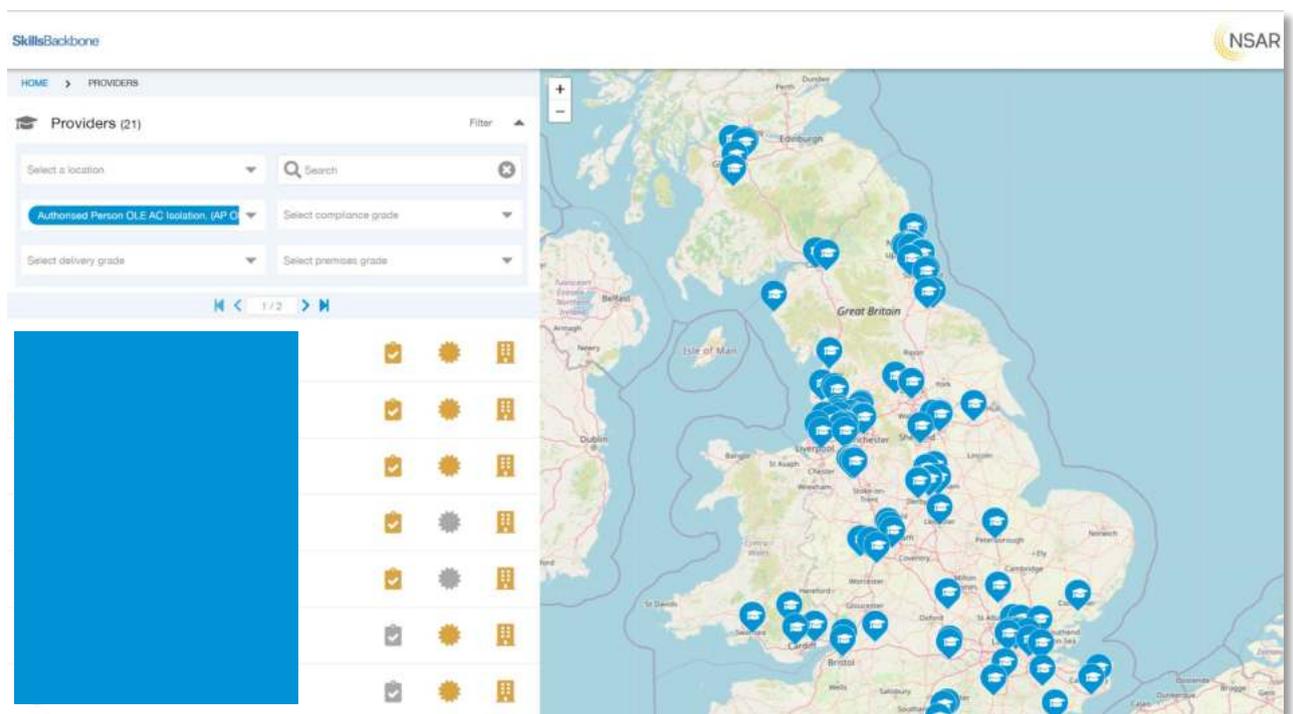
### 13.3. Searching for a Training Provider or Course

Type in whatever it is that you are searching for and the system will return courses and providers that it has found matching the letters you are adding to the search bar.



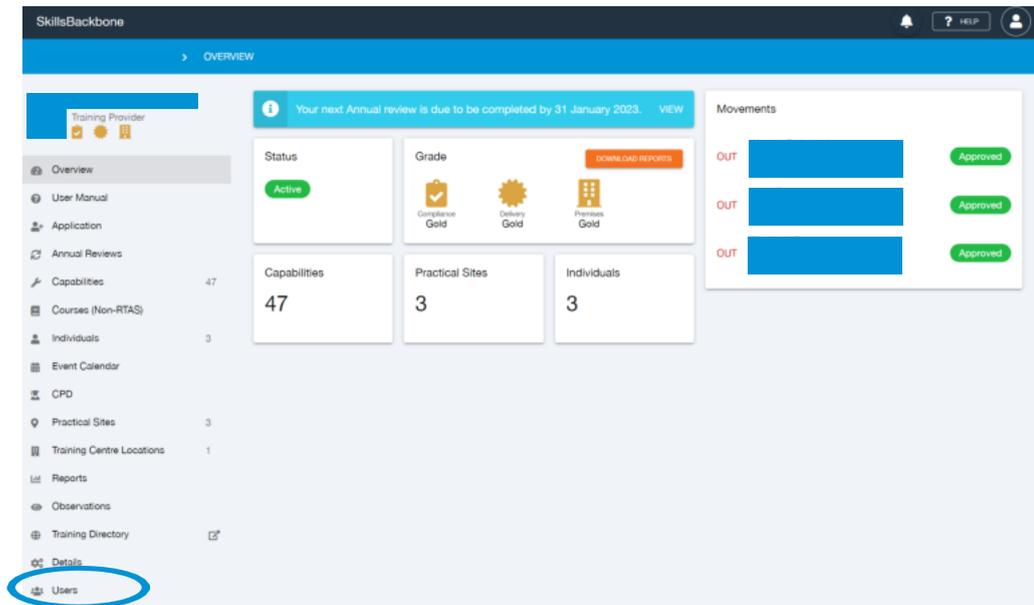
Once you have identified from the drop-down what you are looking for simply select it from the list.

The system will then take you to the content page where all matches found are shown. To view one in more detail, just click on the one that you want from the results list, the bar will turn grey as you hover over what you are about to click from the view.

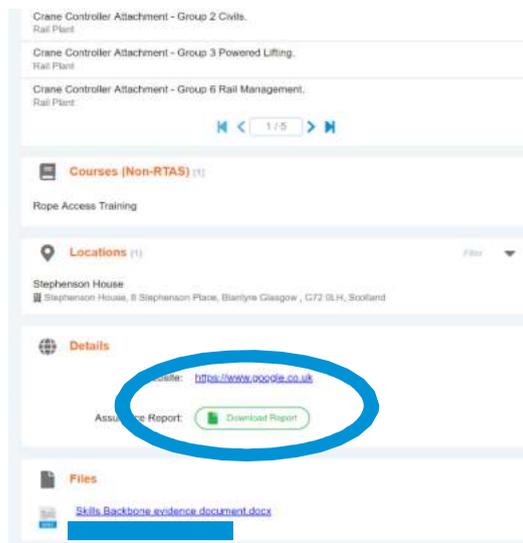
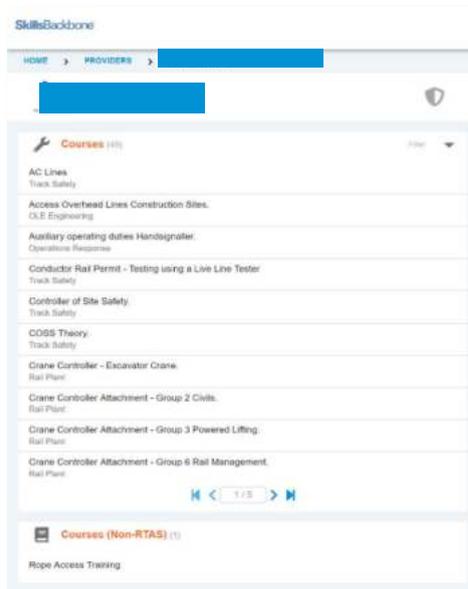


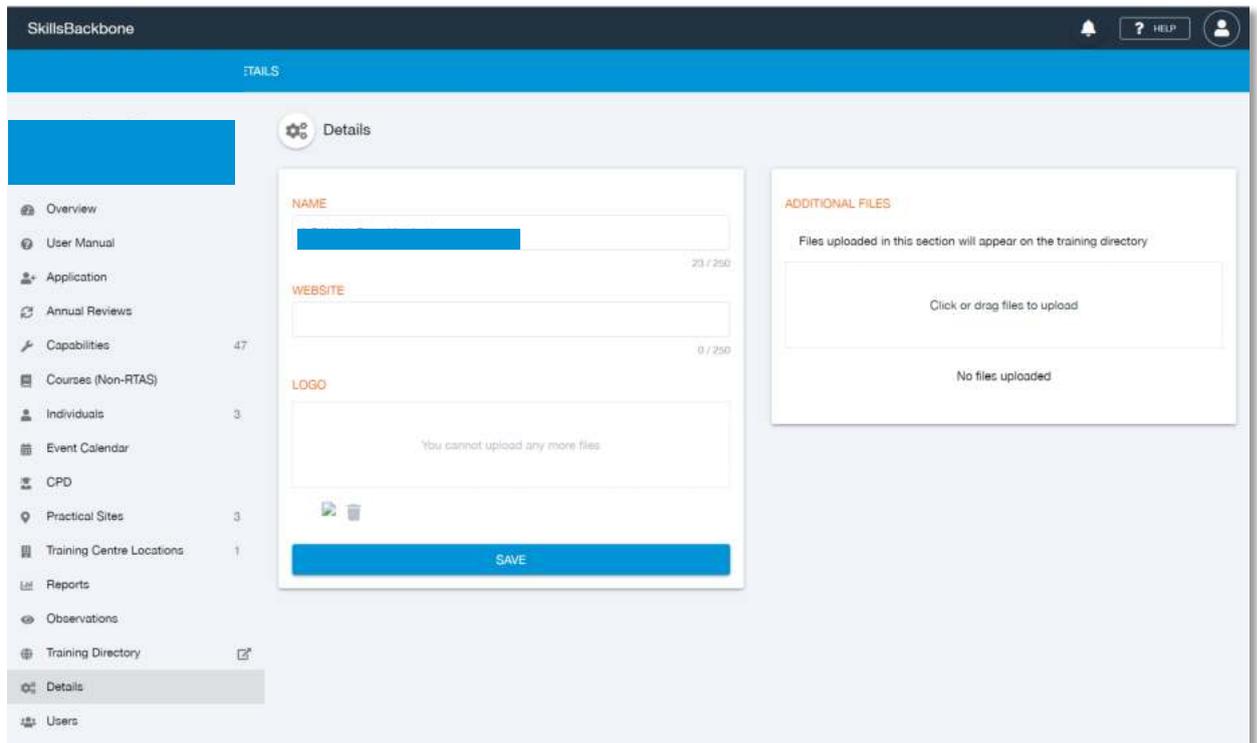
Whatever you have chosen you will be taken to the home page of that provider which looks the same as your own outline earlier in this manual.

## 14. Details



The details section is where you can add additional information about your provision as an Assured Provider such as brochures or flyers etc and add your Provider Logo. When these are uploaded they appear on the Training Directory.



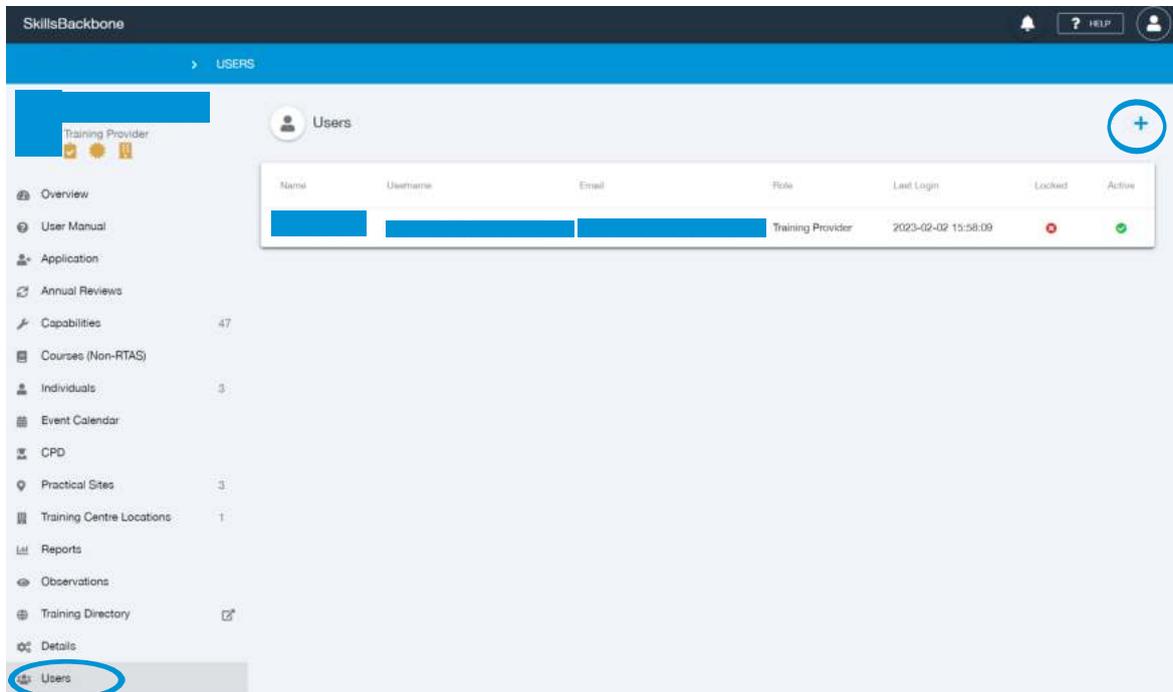


If you wish to change your logo just use the dustbin icon next to the image and reupload.

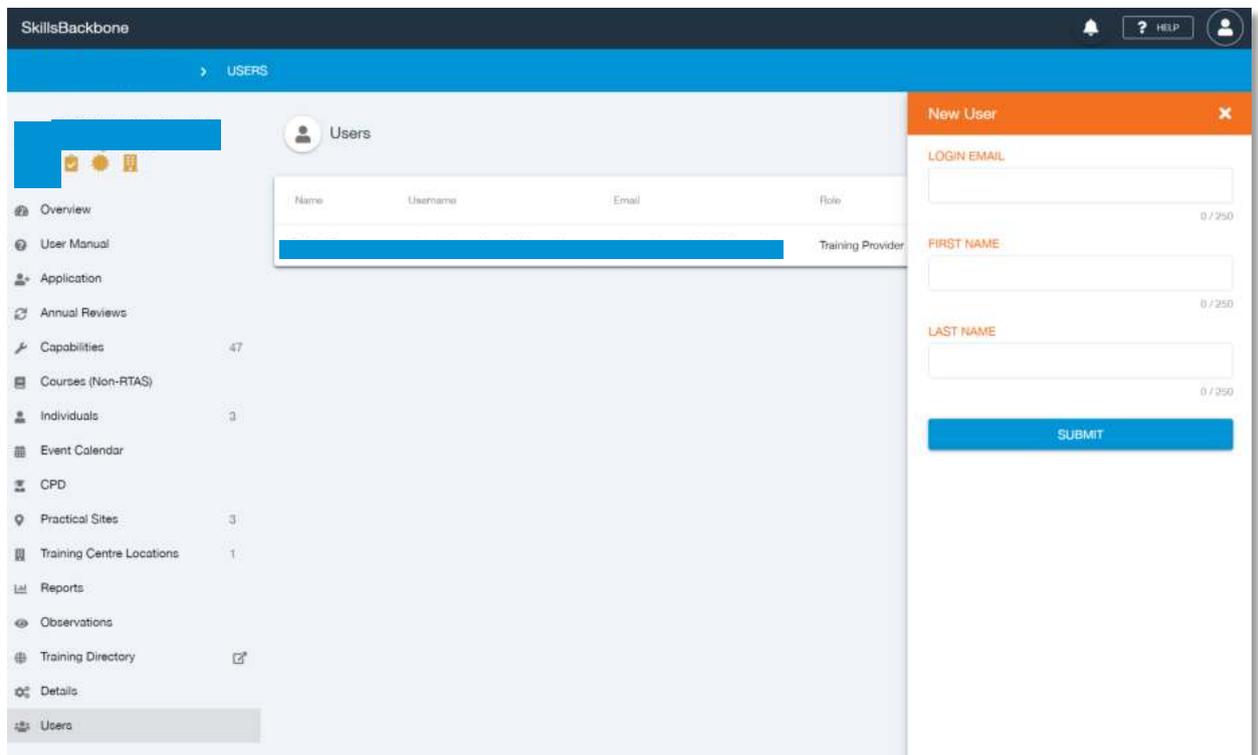
When you are done, **SAVE** and what you have changed will appear on the Directory. Also remember that any **Non-RTAS Courses** will also appear in the Training Directory. These are added as described earlier in this manual.

## 15. Users

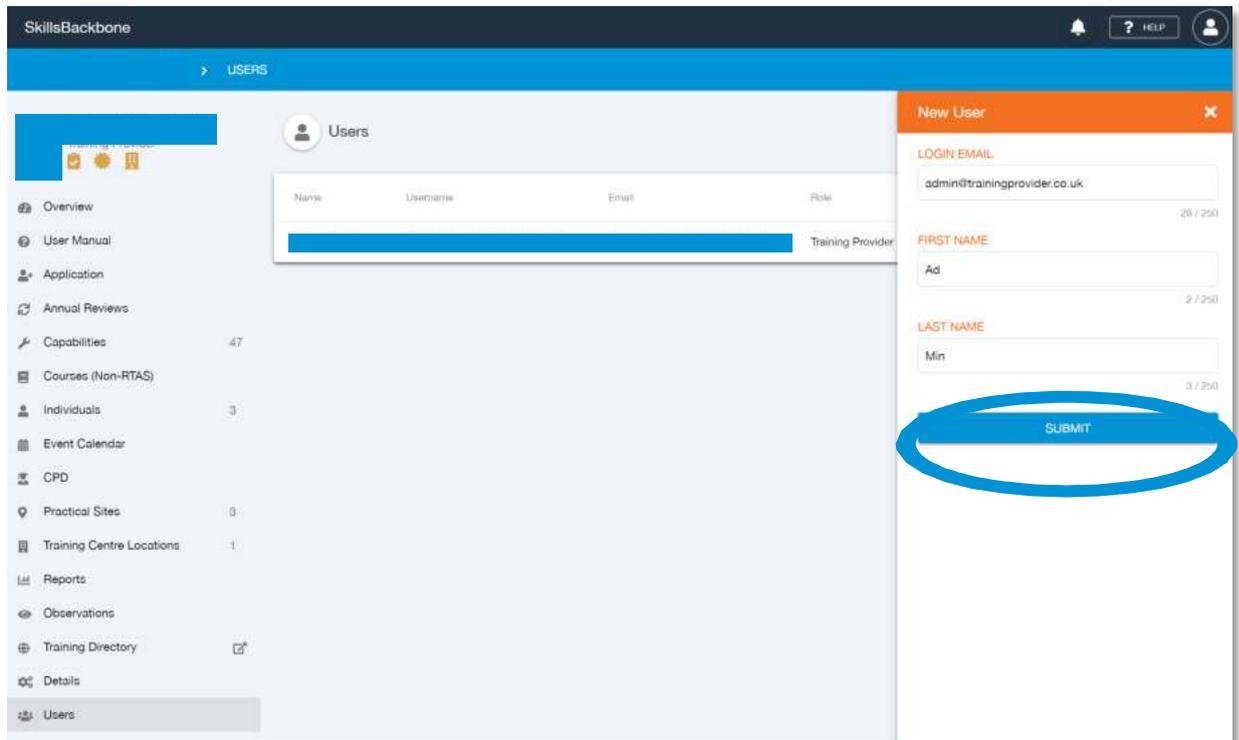
This section allows you to create additional administrator log ins. The summary screen lists the current users.



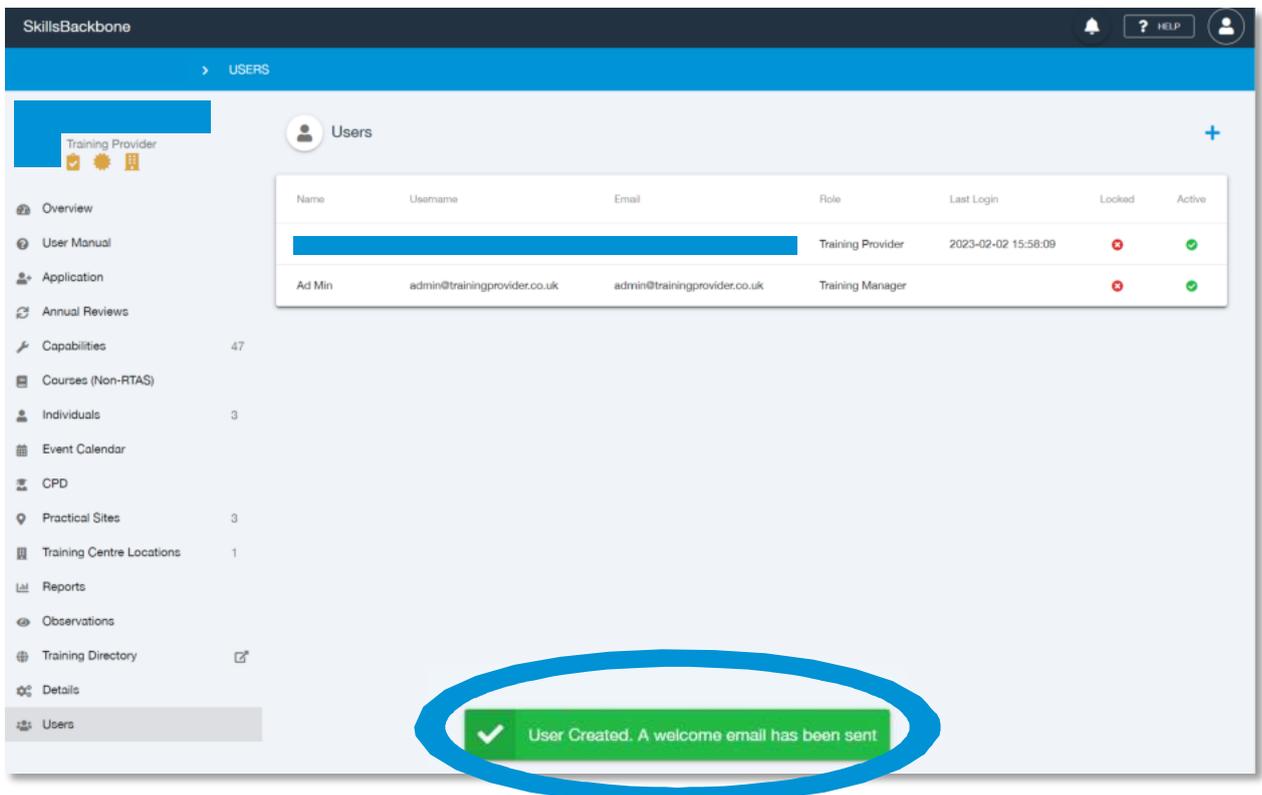
To add a new administrator user, click on the + in the top right-hand corner of the page. This opens the **New User** input side bar.



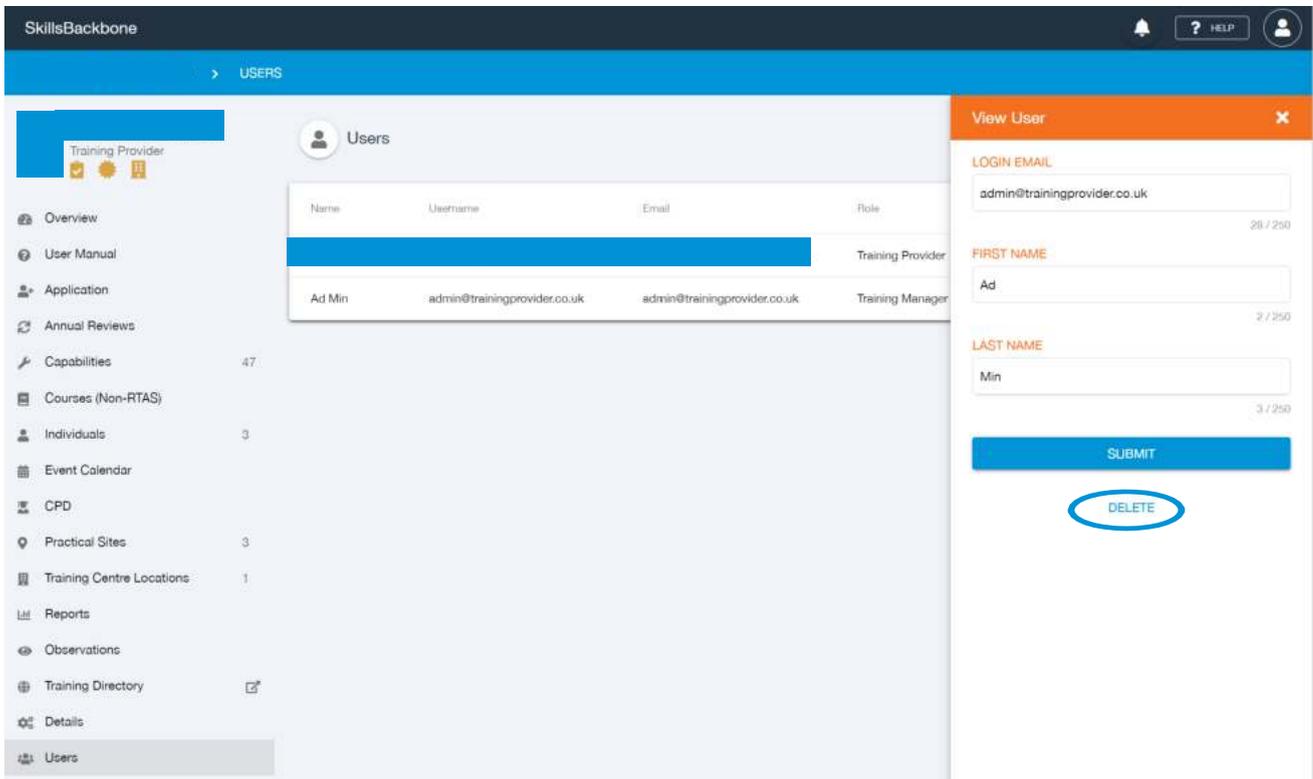
Complete the information requested in the pop outside bar and **SUBMIT**.



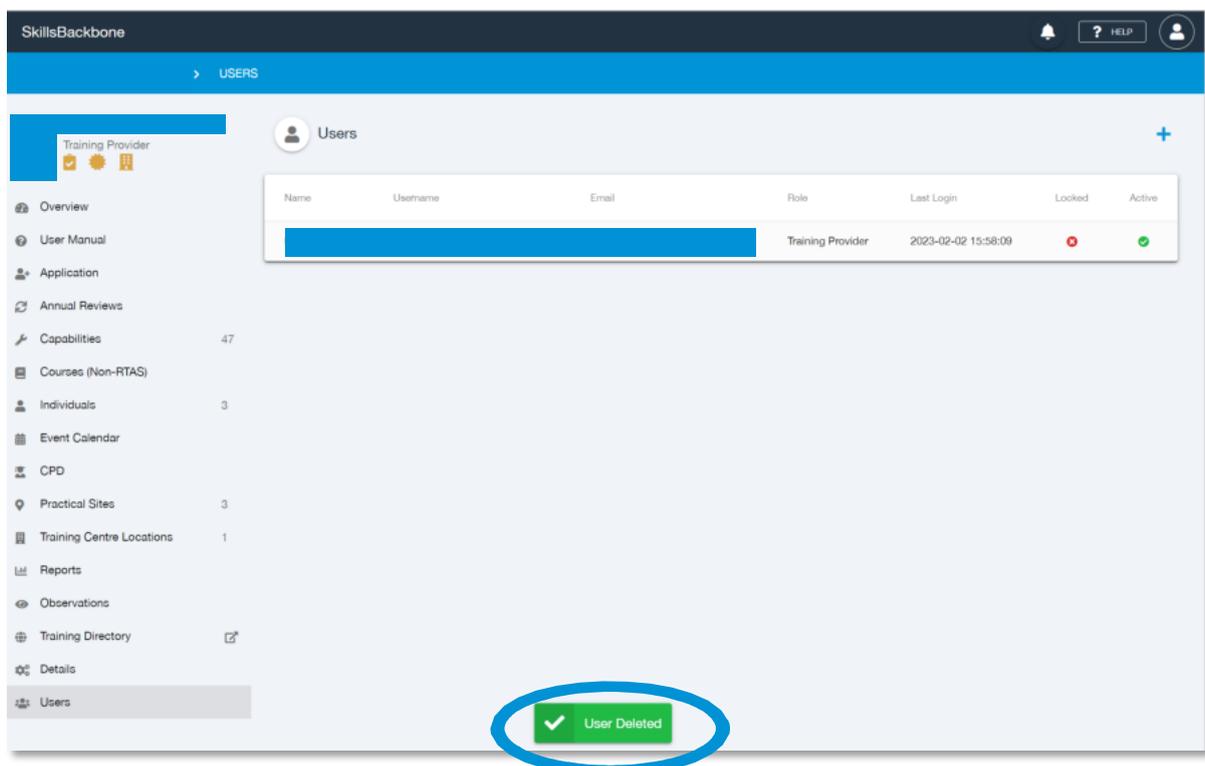
The newly added administrator will then appear on the list of users with a confirmation pop-up message that will disappear after a few seconds.



To **DELETE** a user select them from the summary list which will open the pop-up side bar again with their details. The screen now shows **SUBMIT** or **DELETE**.

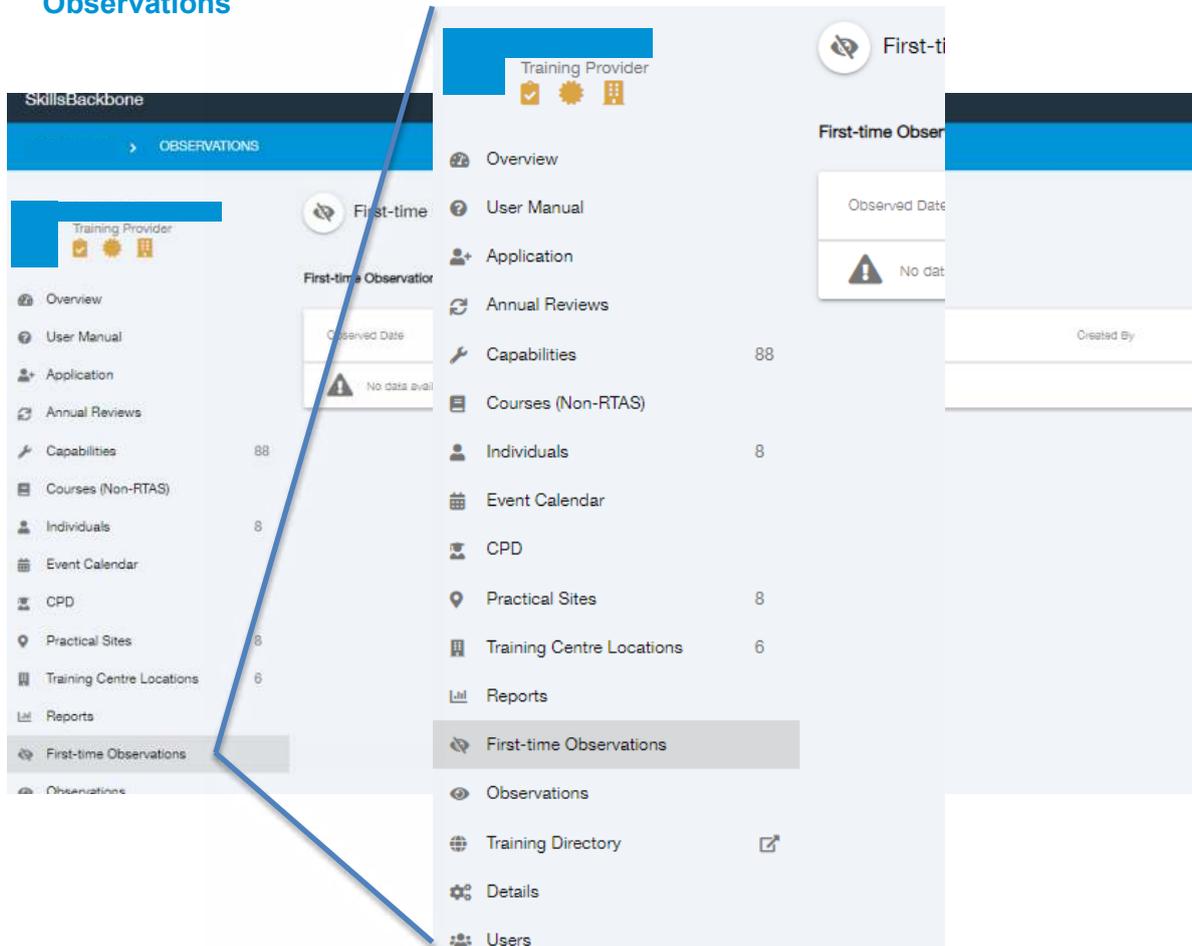


Once they are deleted, they will disappear from the main list again.



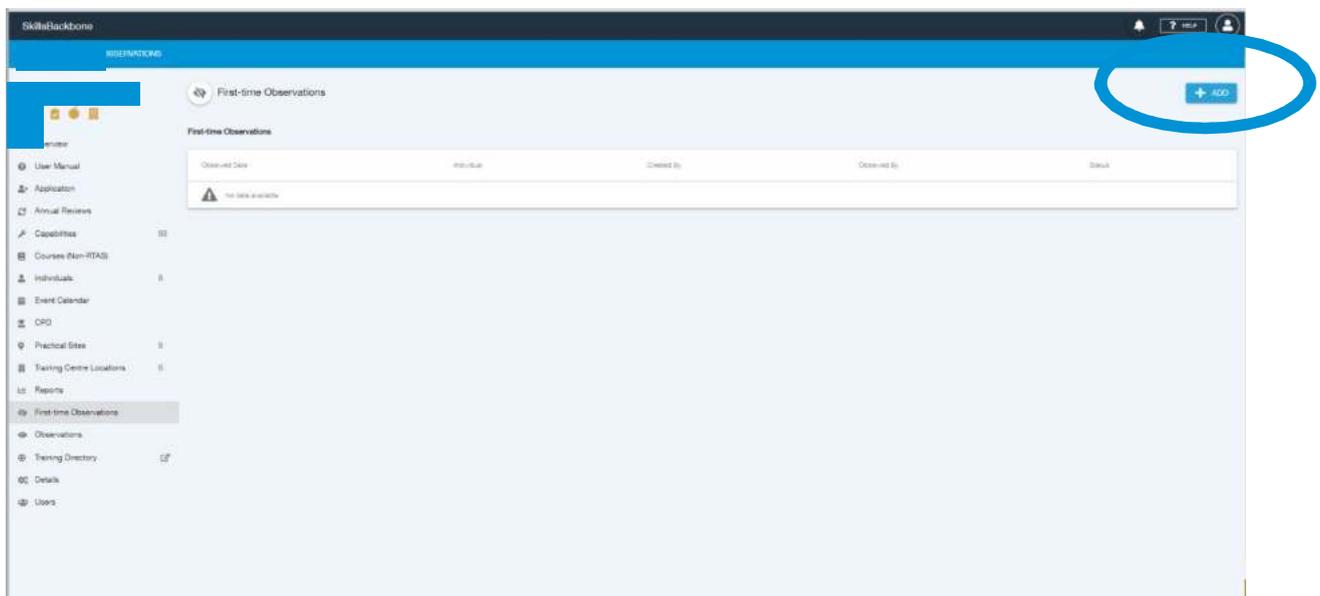
## 16. First-Time Trainer Observation Booking

Administrators & Training Managers will see a new tab on their portal for **First-Time Observations**

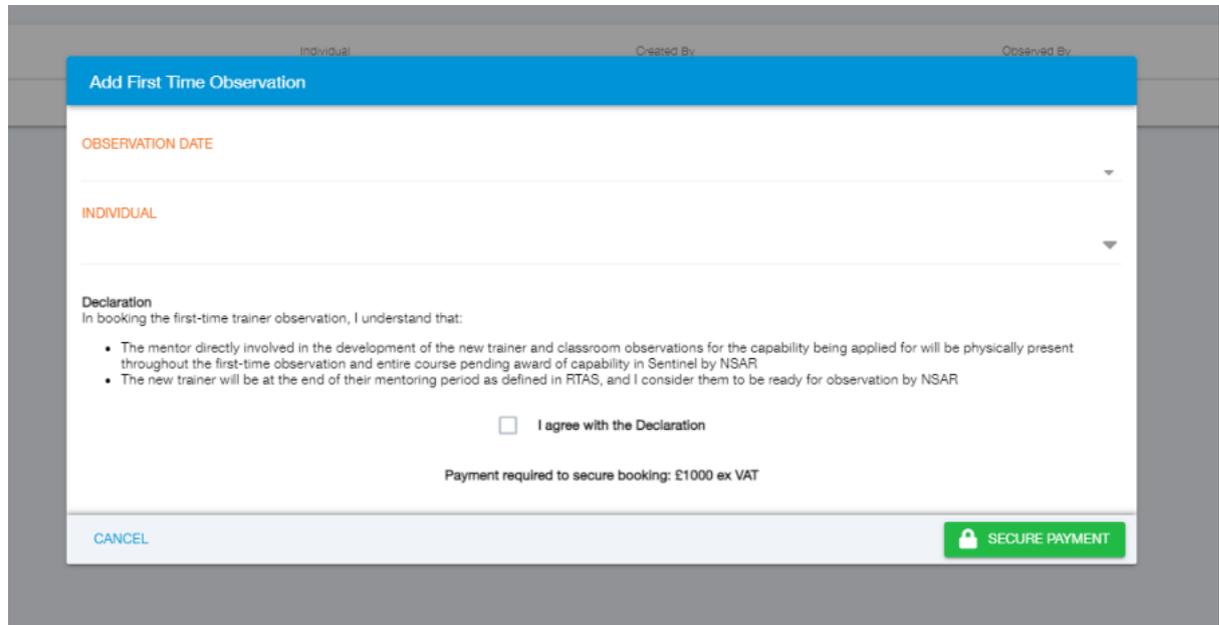


### 16.1. Making a Booking

Book a new first time observation request by clicking the **+ADD** button



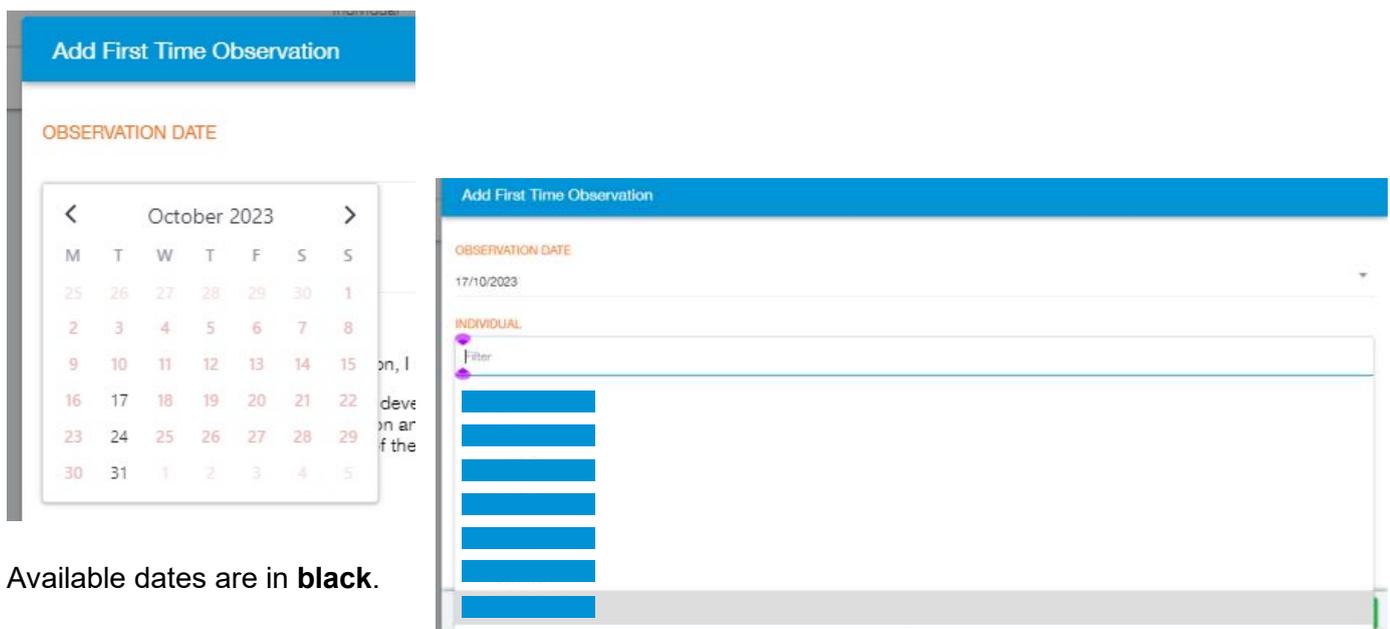
This will open a pop-up window asking you to select the date that you want to book, which individual you want to book it for and to agree with the Declaration statements.



Complete the sections as per the drop-down selections.

**Note:**

- ***you cannot progress without agreeing to the declaration. If you are unable to do this you must wait until you can and rebook at a later date.***
- ***the earliest date that you will be able to book is 4 weeks in the future.***



Available dates are in **black**.

You cannot book a first-time observation without agreeing that the declarations are correct

### Add First Time Observation

**OBSERVATION DATE**  
17/10/2023

**INDIVIDUAL**

**Declaration**  
In booking the first-time trainer observation, I understand that:

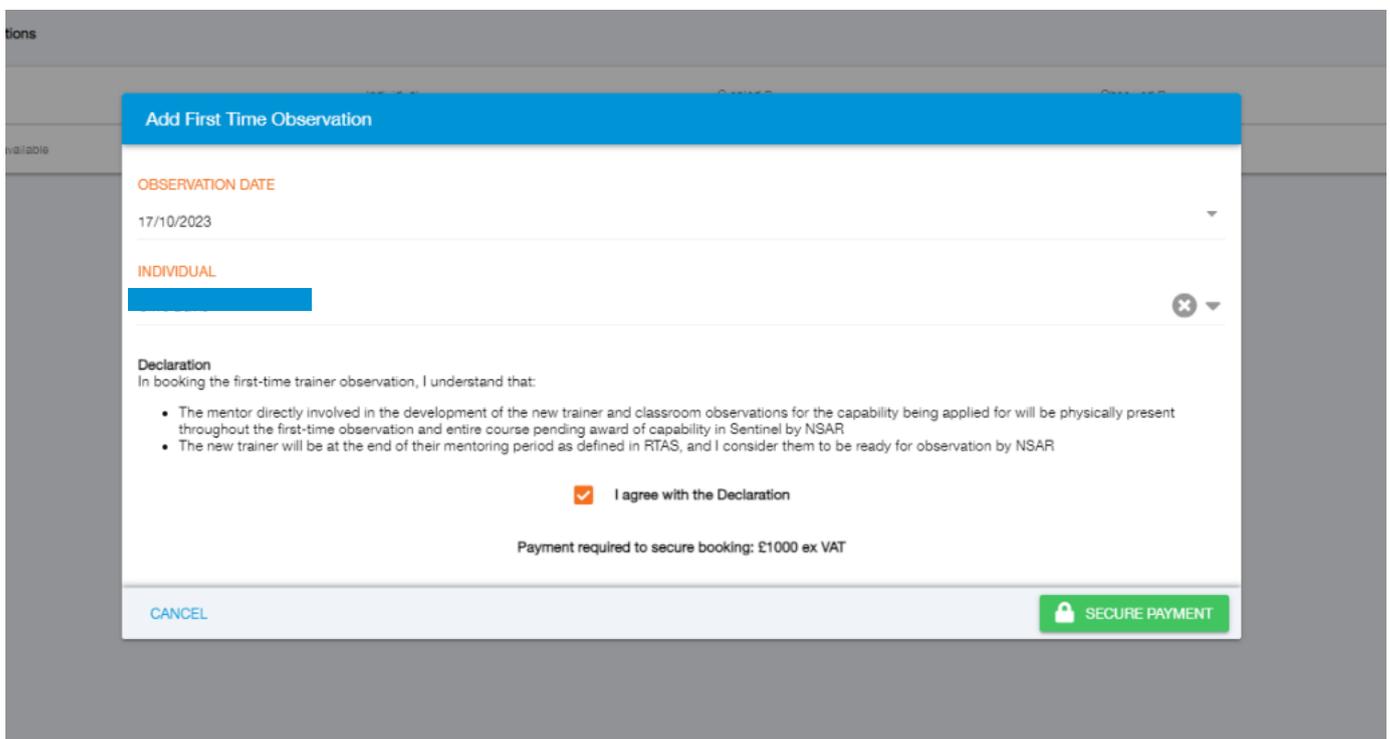
- The mentor directly involved in the development of the new trainer and classroom observations for the capability being applied for will be physically present throughout the first-time observation and entire course pending award of capability in Sentinel by NSAR
- The new trainer will be at the end of their mentoring period as defined in RTAS, and I consider them to be ready for observation by NSAR

I agree with the Declaration **An observation cannot be booked without both statements being declared as correct**

Payment required to secure booking: £1000 ex VAT

[CANCEL](#) [SECURE PAYMENT](#)

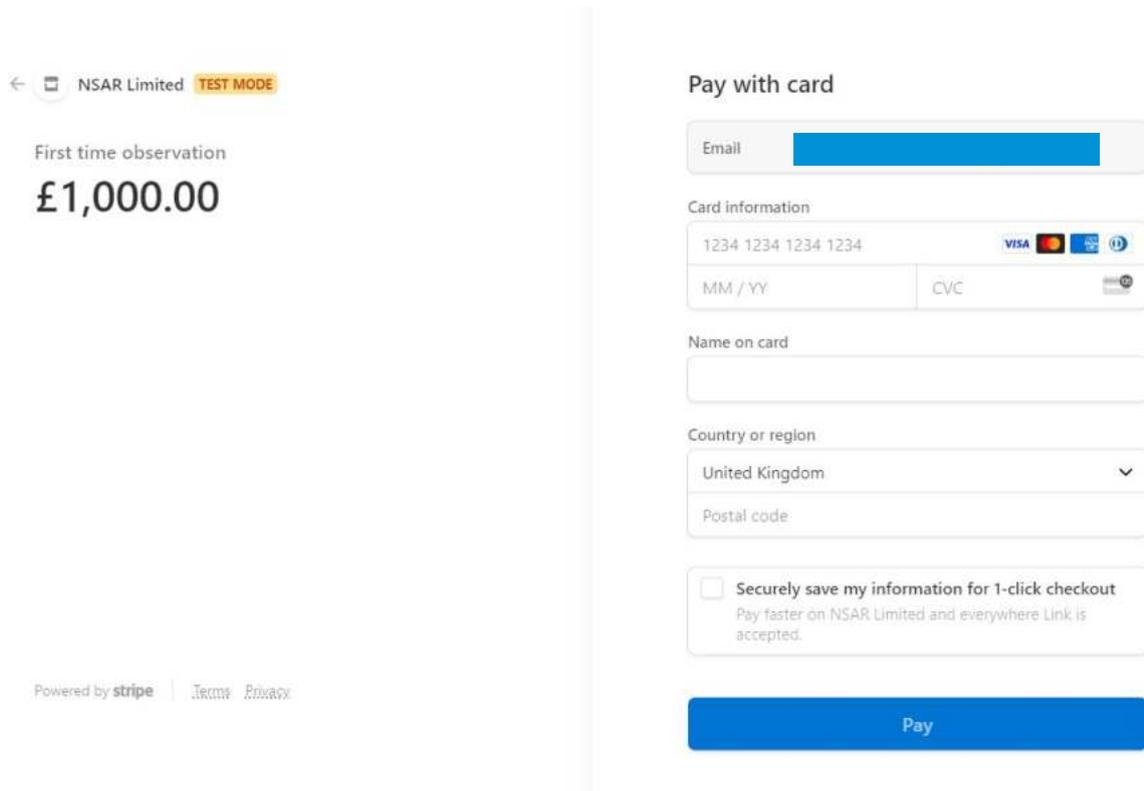
When you have made the declaration click **SECURE PAYMENT** to pay for the observation and complete the booking.



The screenshot shows the 'Add First Time Observation' form with the following details:

- OBSERVATION DATE:** 17/10/2023
- INDIVIDUAL:** [Redacted]
- Declaration:** In booking the first-time trainer observation, I understand that:
  - The mentor directly involved in the development of the new trainer and classroom observations for the capability being applied for will be physically present throughout the first-time observation and entire course pending award of capability in Sentinel by NSAR
  - The new trainer will be at the end of their mentoring period as defined in RTAS, and I consider them to be ready for observation by NSAR
- Agreement:**  I agree with the Declaration
- Payment:** Payment required to secure booking: £1000 ex VAT
- Buttons:** [CANCEL](#) and [SECURE PAYMENT](#)

This will open the secure payment app to make payment.



← NSAR Limited TEST MODE

First time observation  
**£1,000.00**

Powered by [stripe](#) | [Terms](#) | [Privacy](#)

### Pay with card

Email

Card information

1234 1234 1234 1234    

MM / YY  CVC  

Name on card

Country or region

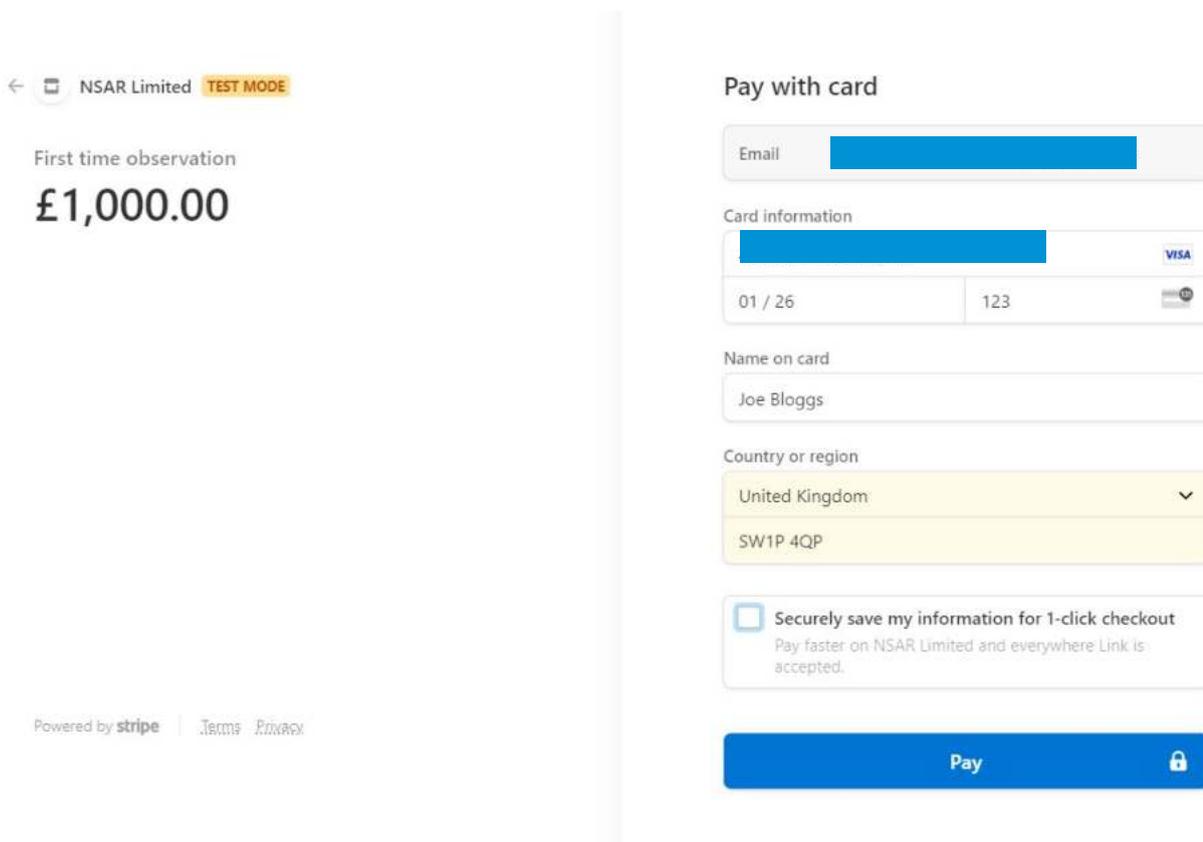
United Kingdom

Postal code

Securely save my information for 1-click checkout  
Pay faster on NSAR Limited and everywhere Link is accepted.

**Pay**

Complete the payment details in the same way as you do for any other online purchase and click **PAY**.



← NSAR Limited TEST MODE

First time observation  
**£1,000.00**

Powered by [stripe](#) | [Terms](#) | [Privacy](#)

### Pay with card

Email

Card information



01 / 26  123 

Name on card

Joe Bloggs

Country or region

United Kingdom

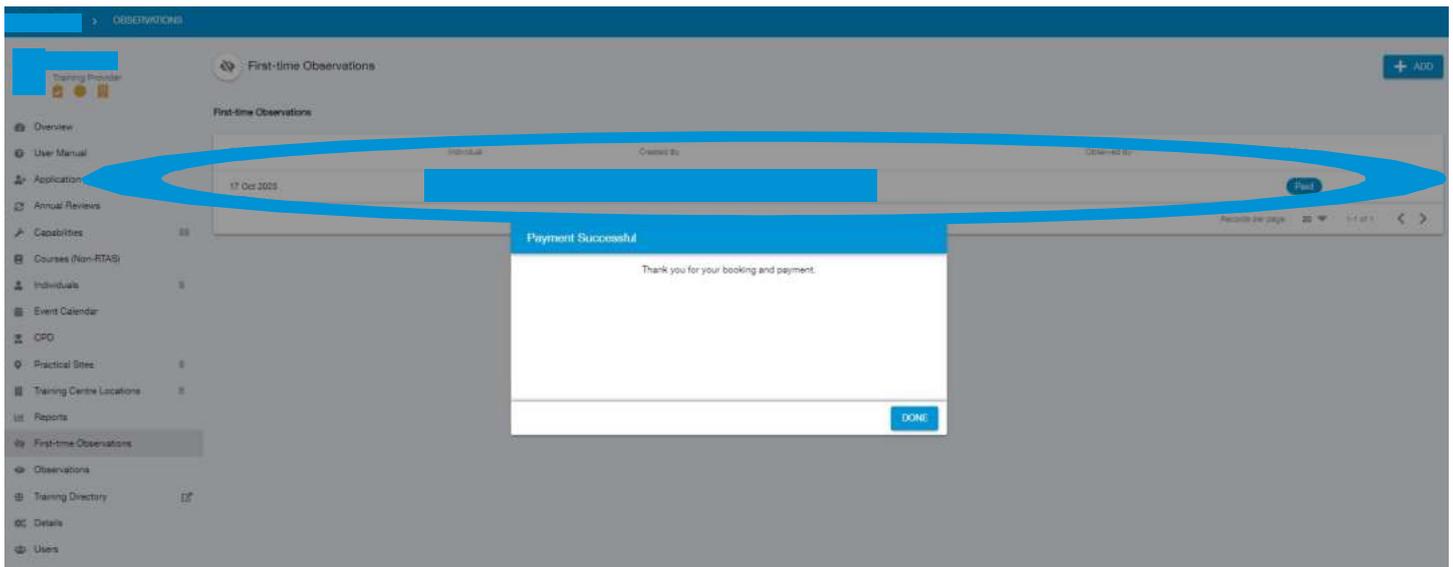
SW1P 4QP

Securely save my information for 1-click checkout  
Pay faster on NSAR Limited and everywhere Link is accepted.

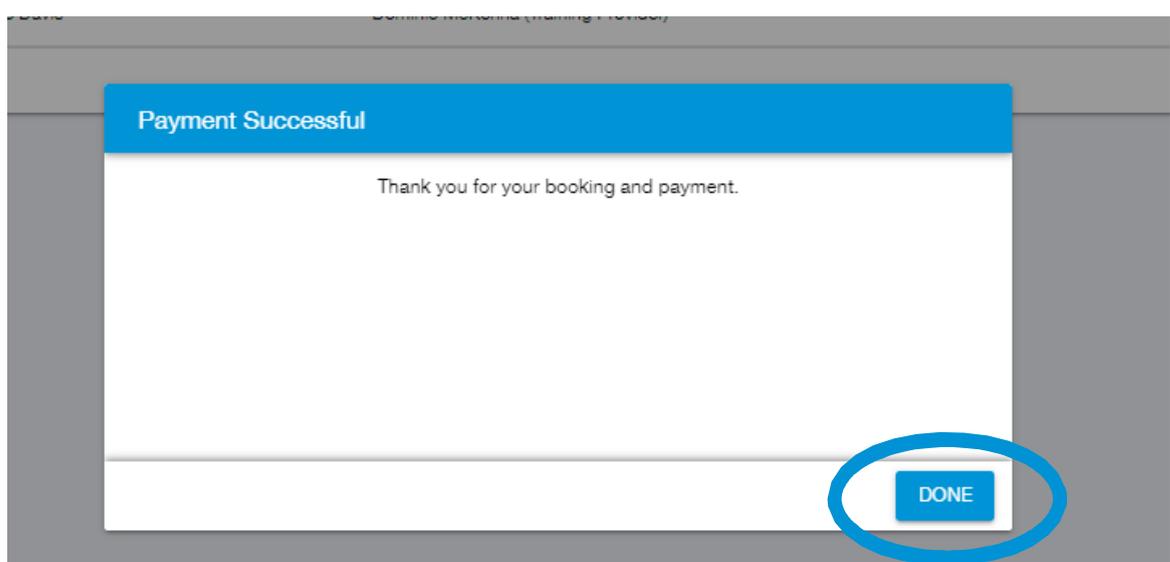
**Pay** 

Once successful payment has been made your screen will return to the Skills Backbone site, thank you for your payment and confirm your booking. Note that you will see your booking has been added in a list in the background of the screenshot and show as paid.

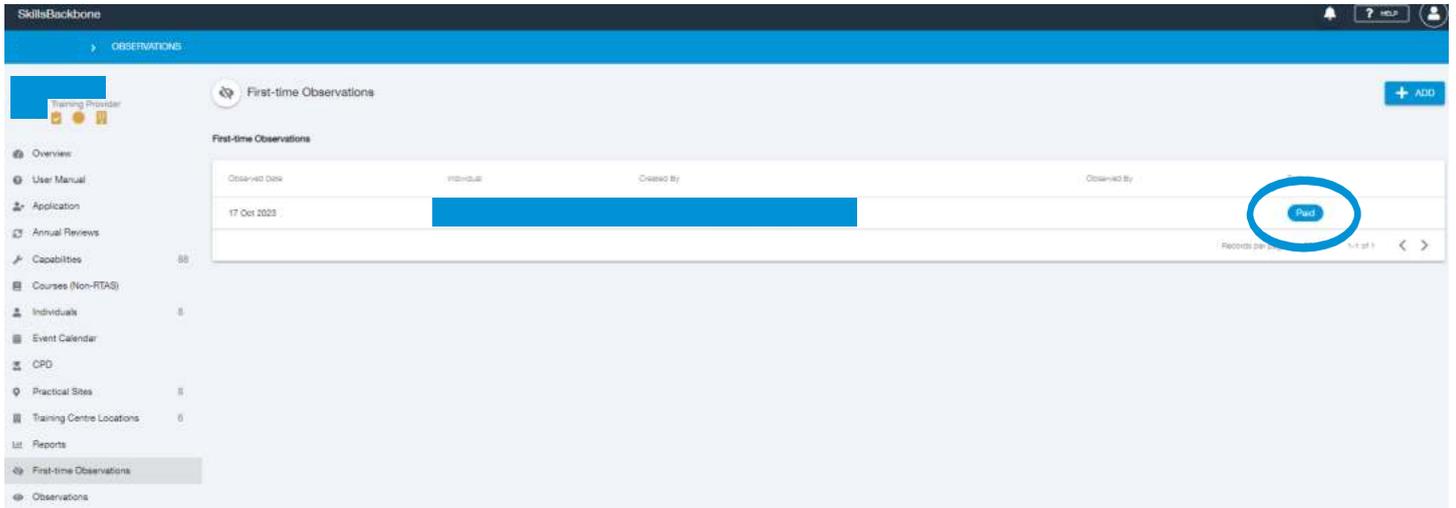
Should payment fail the system will return to Skills Backbone first time observation screen showing no bookings.



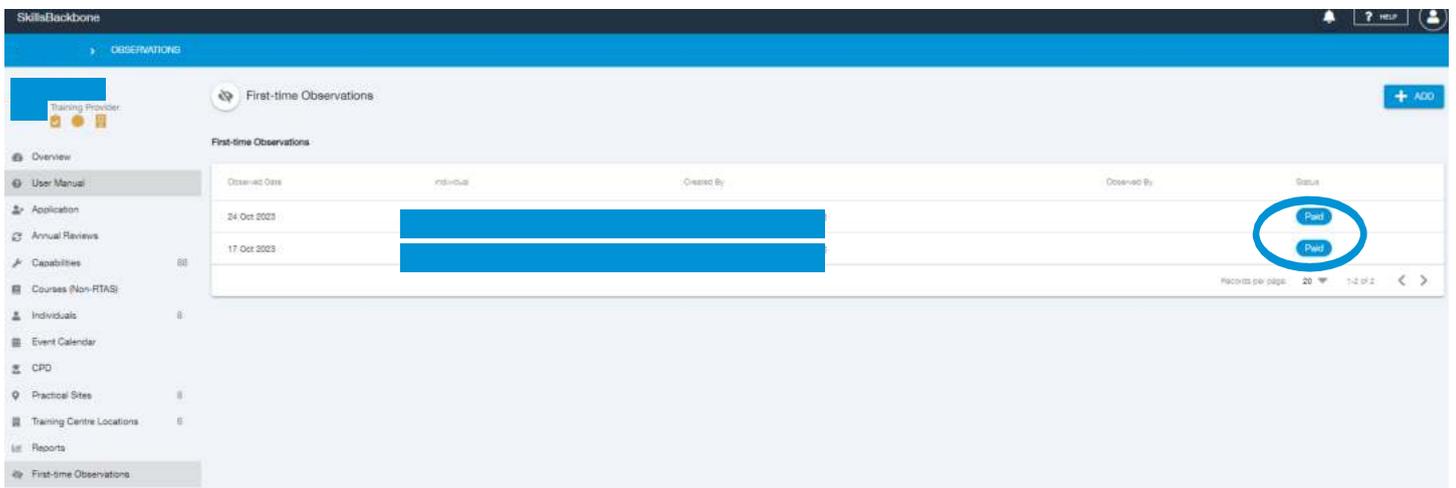
To exit the confirmation screens, click **DONE**



You will then see your booking and be able to track it through its stages to completion.

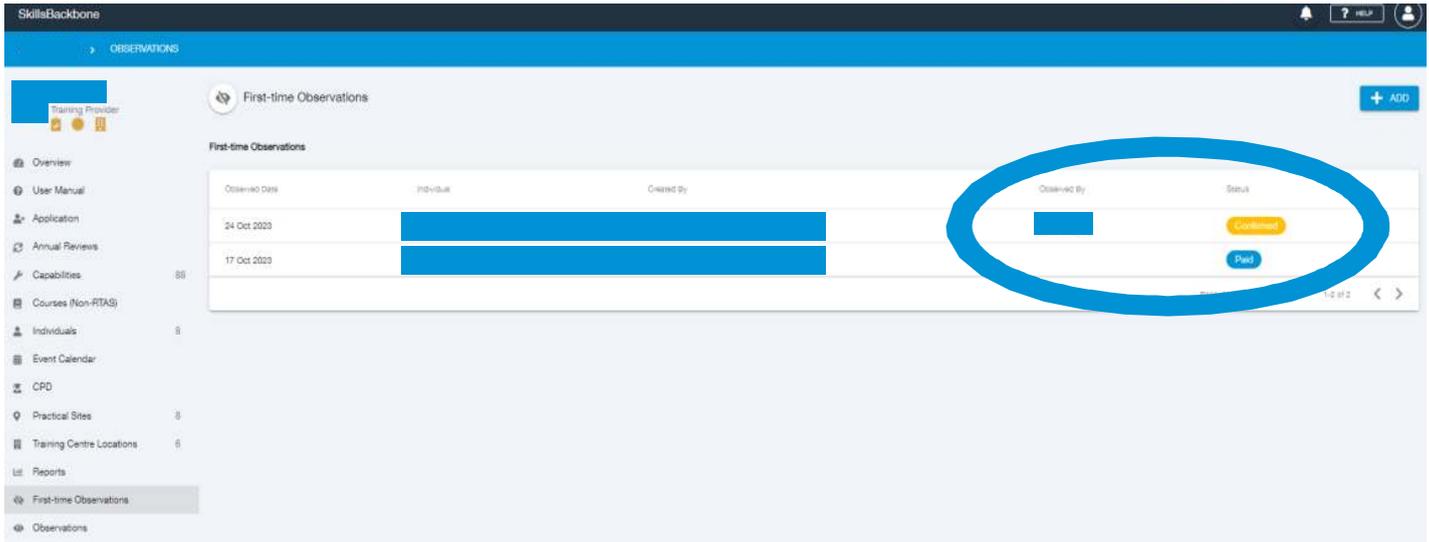


To make another booking, follow the same process again [16.1 Making a Booking](#) and you will see that each gets added to the list of bookings that you have made.



NSAR will be alerted to your confirmed booking and contact you to discuss the location of the observation so that the most suitable QAM can be allocated to your booking.

When a QAM has been allocated your booking will change to show the date as **CONFIRMED**.



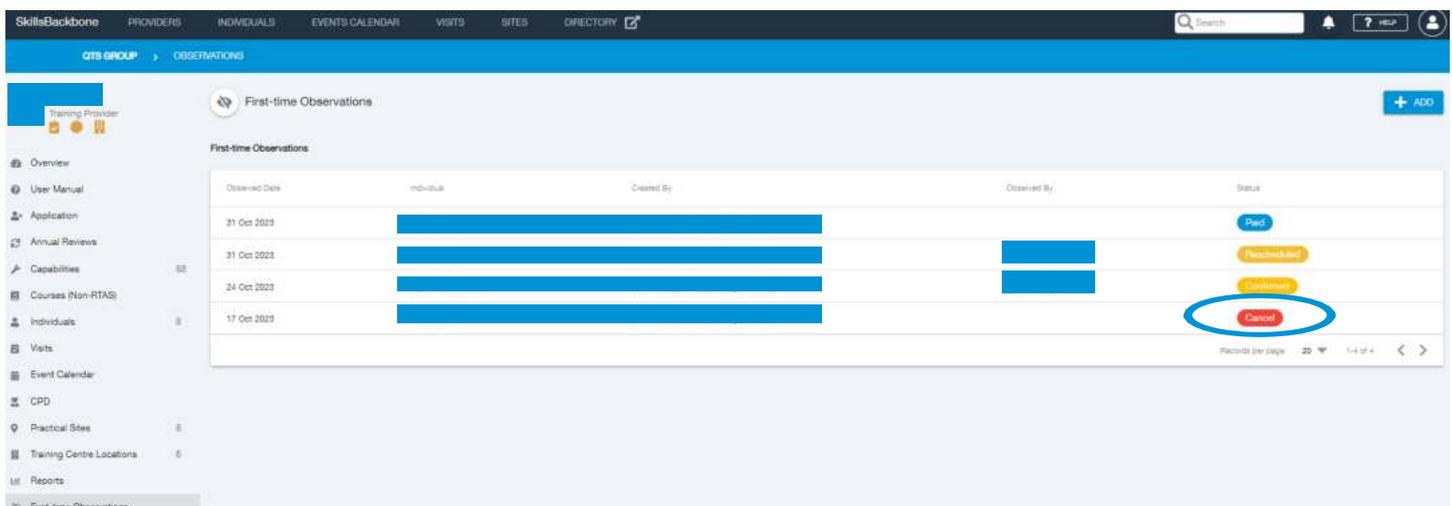
## 16.2. Changing a Booking

To make any changes to your booking you must contact NSAR via Freshdesk to explain what changes you need to make and why.

## 16.3. Cancelling a Booking

If you need a booking cancelled altogether then NSAR will do this refunding the paid amount to the card used when making payment and for £1000 minus administration fee from the payment app [<https://stripe.com/gb/pricing>]

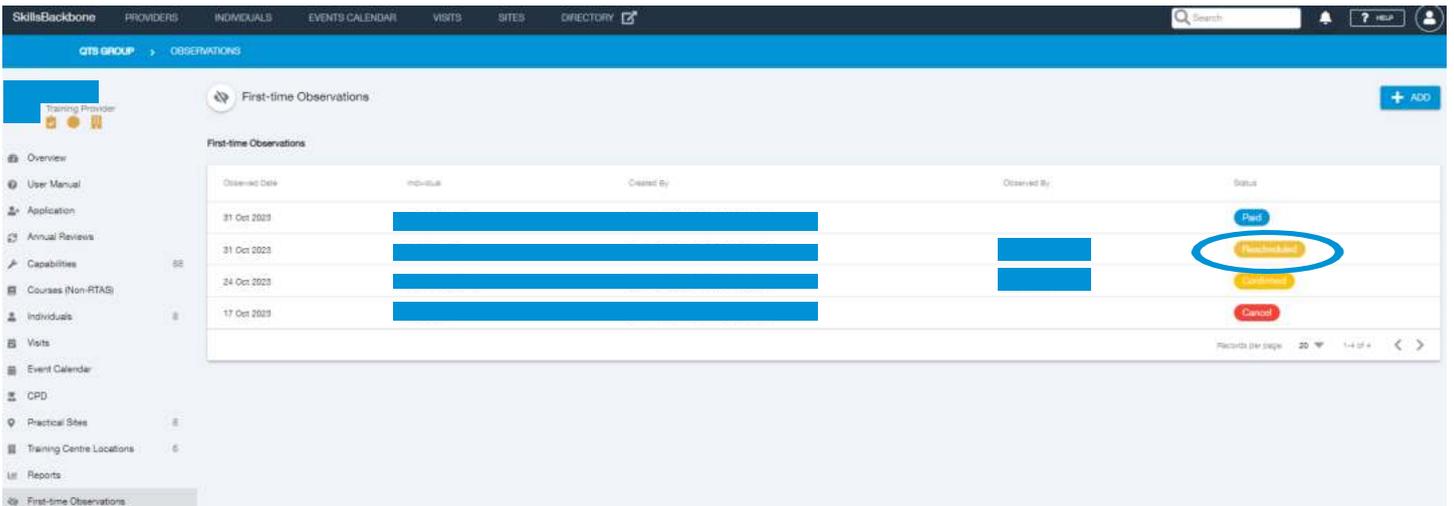
Due to this NSAR will not **cancel** a booking and instead reschedule after discussion with you. When a booking is **cancelled**, your system will update to record this.



## 16.4. Cancelling a Booking

If you need a booking **rescheduled** to another date due to exceptional reasons, then NSAR will do this for you after dialogue with you. This will move the date to another date agreed with NSAR and will not cause any change in the payment which has been processed for it.

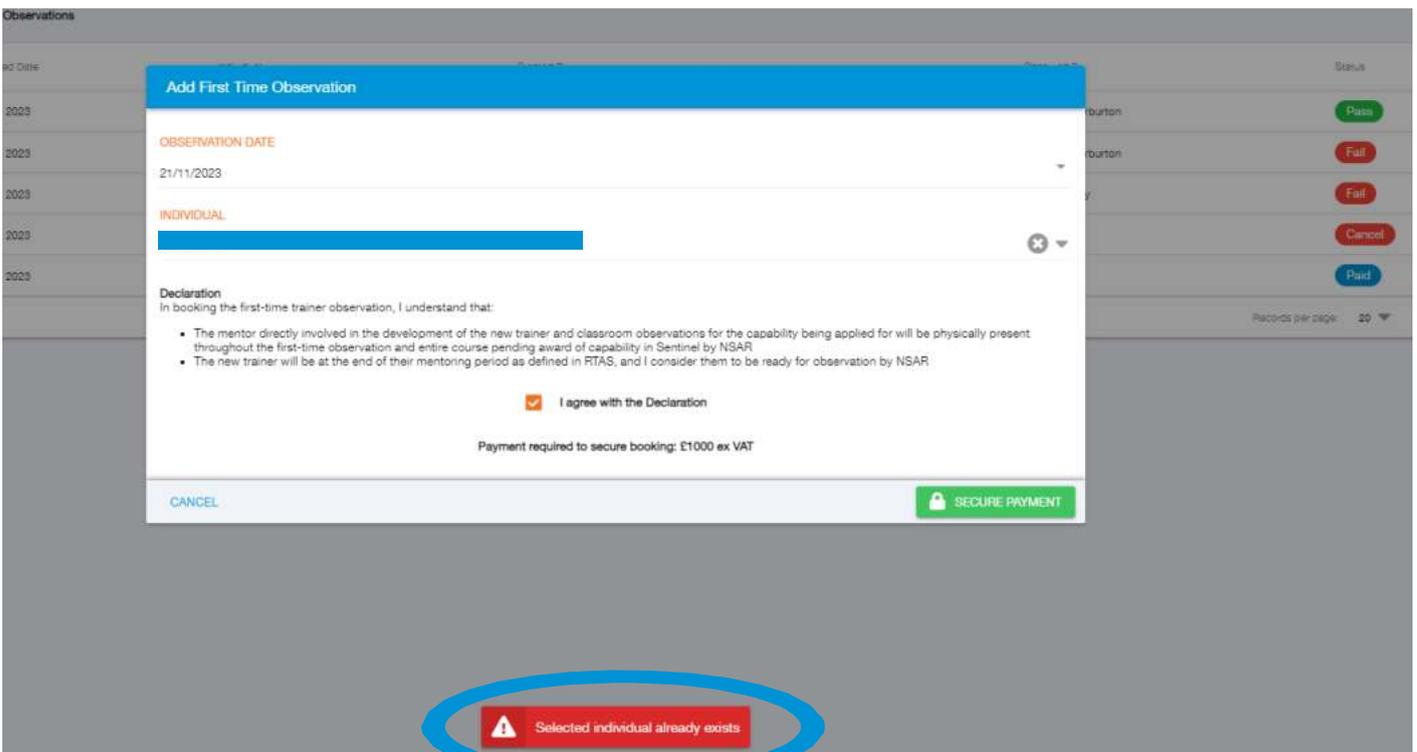
When a booking is **rescheduled**, your system will update to record this.



Observed Date	Individual	Created By	Observed By	Status
31 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Paid
31 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Rescheduled
24 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Confirmed
17 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Cancel

## 16.5. Duplicate Bookings

Duplicate bookings cannot be made. If you attempt to make a booking for someone already waiting for their result as either **paid**, **confirmed** or **rescheduled** the system will notify you that the booking already exists. Only if the same person has failed will you be allowed to make another booking for the same trainer.



**Add First Time Observation**

**OBSERVATION DATE**  
21/11/2023

**INDIVIDUAL**  
[Redacted]

**Declaration**  
In booking the first-time trainer observation, I understand that:

- The mentor directly involved in the development of the new trainer and classroom observations for the capability being applied for will be physically present throughout the first-time observation and entire course pending award of capability in Sentinel by NSAR
- The new trainer will be at the end of their mentoring period as defined in RTAS, and I consider them to be ready for observation by NSAR

I agree with the Declaration

Payment required to secure booking: £1000 ex VAT

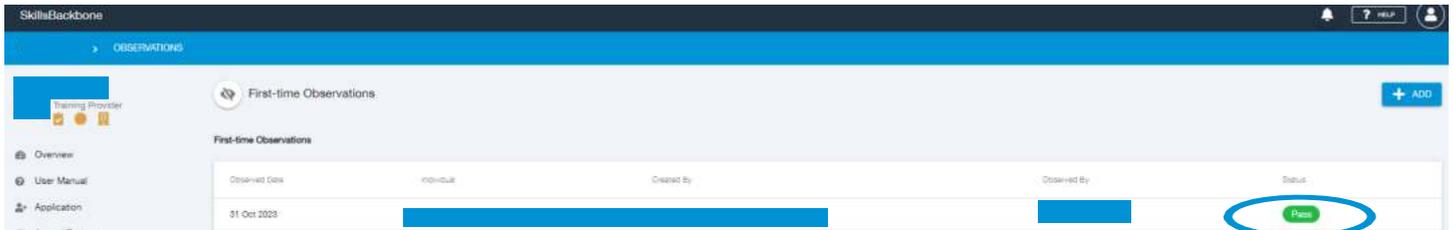
[CANCEL](#) [SECURE PAYMENT](#)

**Selected individual already exists**

## 16.6. Completion of a First-time Observation

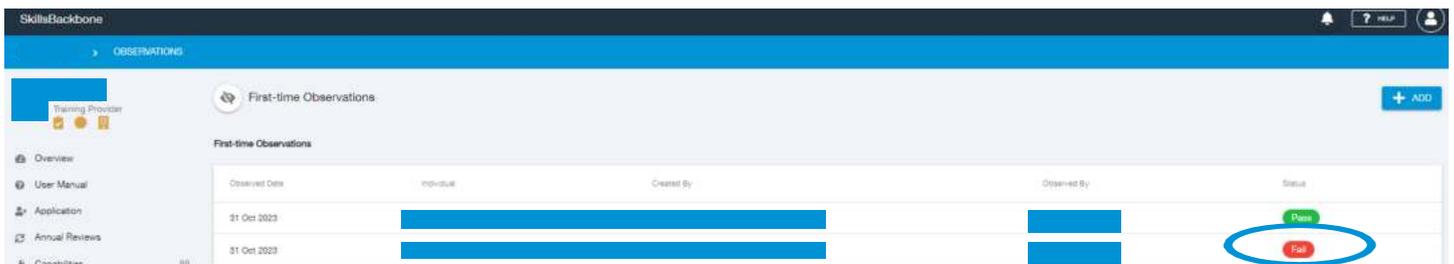
Once the observation has been completed by the Delivery QAM, they will update the observation to the result and upload the report which you will be able to access and download.

When an observation has been **passed**, your system will update to record this.



Observed Date	Individual	Created By	Observed By	Status
31 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Pass

When an observation has been **failed**, your system will update to record this.



Observed Date	Individual	Created By	Observed By	Status
31 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Pass
31 Oct 2023	[Redacted]	[Redacted]	[Redacted]	Fail

## 16.7. First time Capabilities following successful first-time trainer observation.

Following the successful observation of a new trainer, you must download the observation form and complete the signatures required on it. This must then be uploaded as evidence when requesting the first capabilities for the new trainer. To make the application for capabilities follow section [6.3.2 Requesting new Capabilities](#)