# Centre Digital Achievement Portal Guidance Document

About the Centre Portal

The Centre Portal is where you can:

- View achievement documents that have been issued to learners for your centre
- Notify learners that their documents are available
- Download copies of those documents for regulatory reporting purposes
- Order printed copies of documents on behalf of learners.

The Centre Portal can be accessed on any device, PC, laptop, tablet and mobile phone and is via your IMI Connect Centres Profile, located in the Systems Access tile. Please contact us using the details on the Support page for more information.
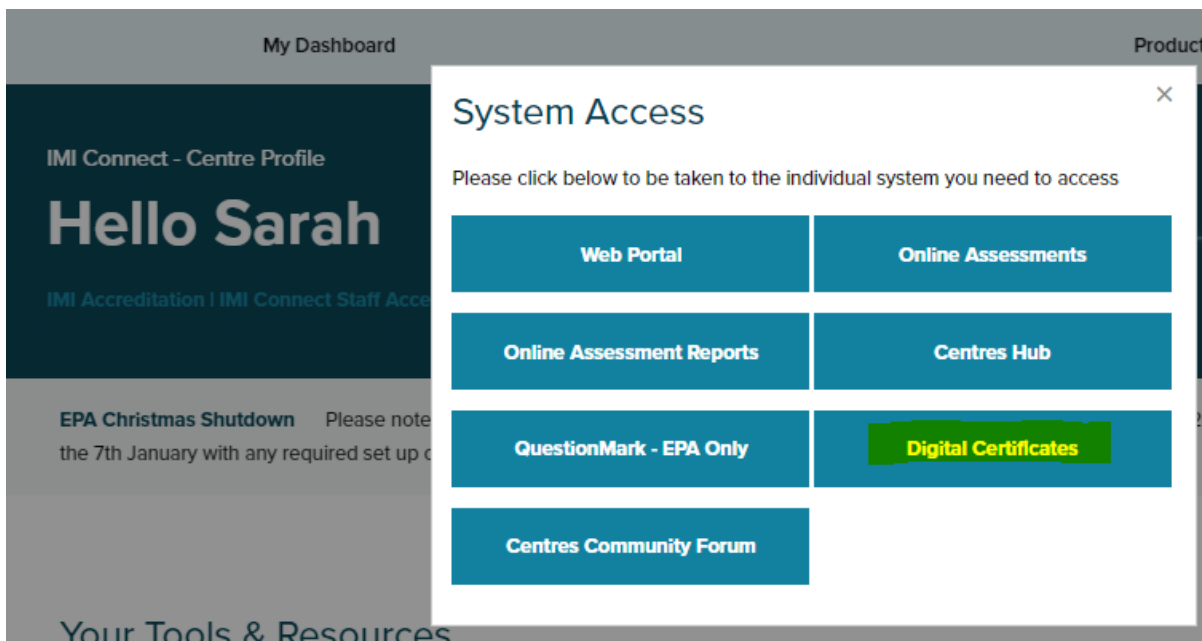
There is no charge for using the Centre Portal to view or download documents.

Accessing the Centre Portal

To access the Centre Portal for the first time, you need to register.

Click on the "Register" button, then complete the requested registration details. When you have completed the registration process, you will receive an email with a verification link. Click the link to verify your account.

If you do not receive your verification email, please check your email spam and/or junk folders as your email provider may not have recognised the sender as a safe sender and re-directed it from your inbox. If after checking your spam and junk folders you still have not received your confirmation email, please contact us via Centres Hub using an Enquiry Form providing your name, date of birth and centre number

The details you enter during the registration process will be matched against the details held in the system. If these details enter match, you will be automatically approved to access your documents.

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If any of the information you supply does not match the details held in the system, your registration will be reviewed by an administrator for your registration to be checked. Once approved, your account will be released, and you will be able to log in.

Please contact us via Centres Hub using an Enquiry Form if you have any queries.
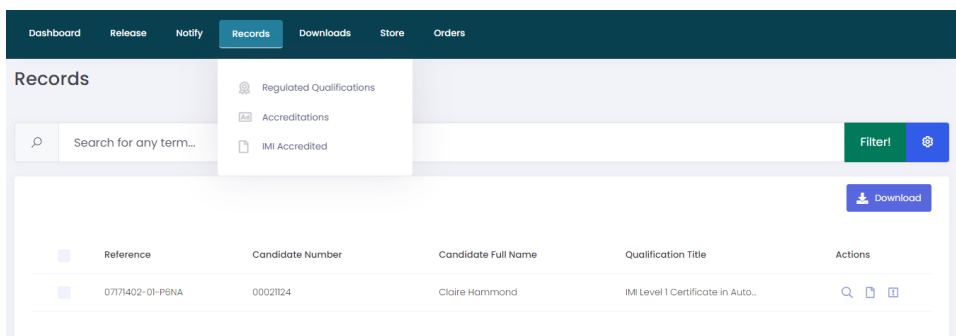
<u>Documents</u>

Whenever new documents are available to view on the Centre portal an email will be sent to the central email address for your organisation listing the documents that have been issued.

There are two main screens where you can view documents:

1. Jobs Issued - this shows all the documents issued in a "job". A job is a collection of documents issued together.
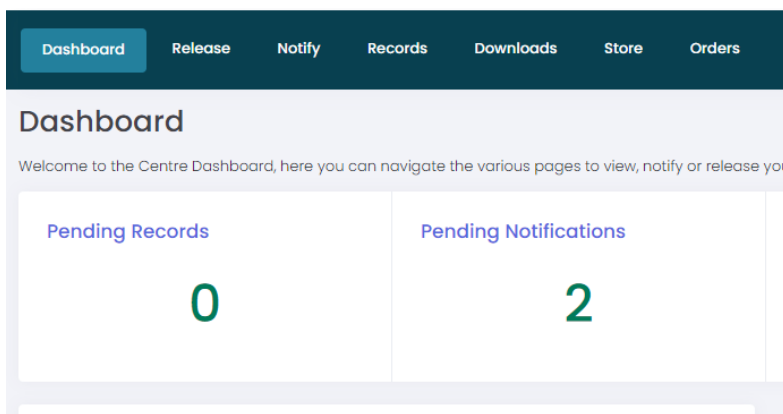
2. Records - you can search for individual learner records on the Records screen.


The digital documents issued on the Centre Portal are official documents of the IMI. However, by design, these digital documents are not intended to be and cannot be printed or emailed for verification purposes. Instead, learners have direct access to their digital documents on the Digital Achievement portal and can share their digital documents securely via the Third-Party portal as well as purchase printed copies of their documents.

The Centre Portal allows you to access and view a digital version of a learner's document and enables you to download copies of documents for regulatory purposes (e.g. to prove training has been delivered).

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Downloading documents

1. Go to the records screen, select the record(s) you wish to download documents for
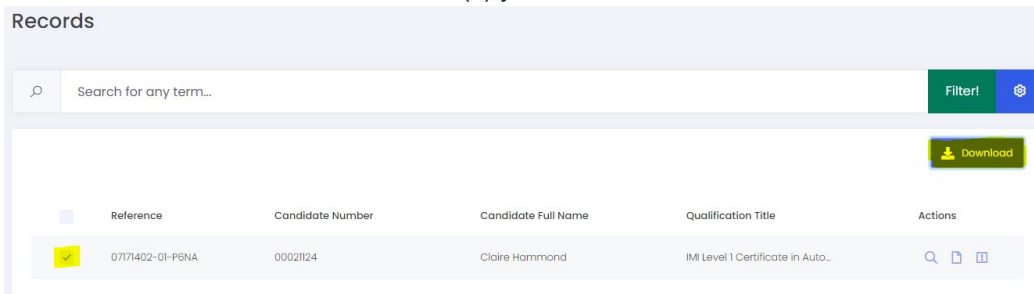
2. Then click the "Download" button.
3. Complete the details in the window; this will create a download zip file containing the selected documents.
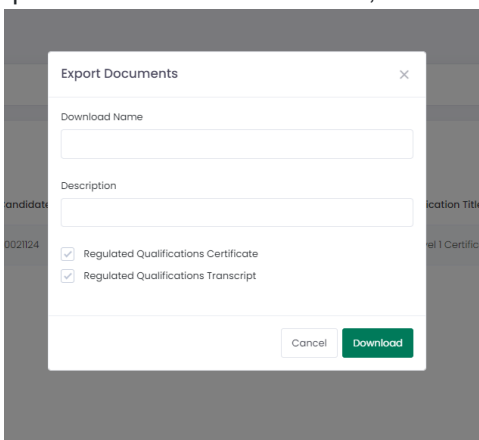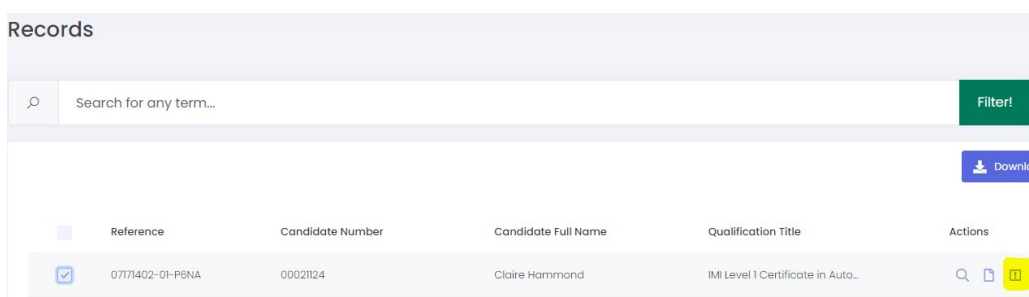

4. Next, go to the downloads page. The zip file you have created should be available to download. Zip files are removed from the server after 7 days.
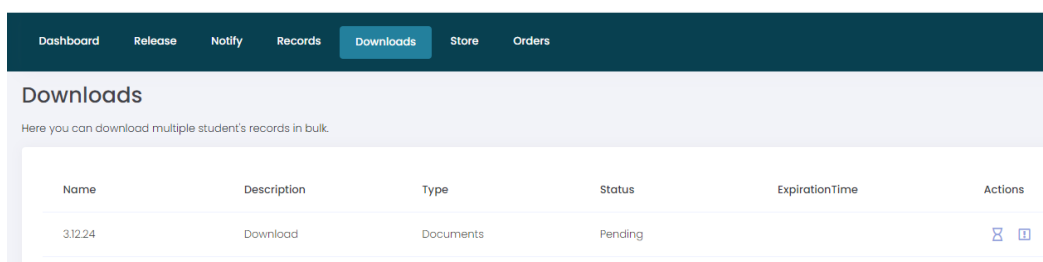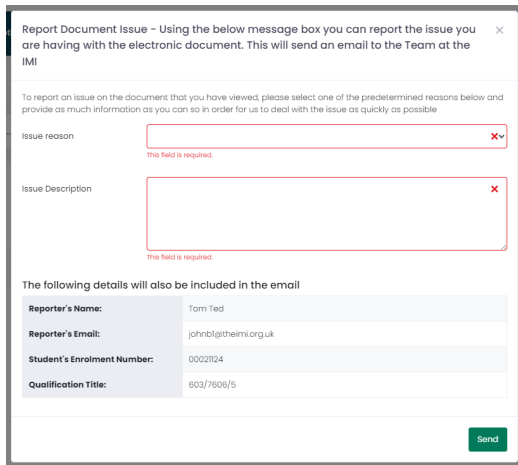

Reporting an issue on a document

If you think something on a document is incorrect then use the Report function next to the relevant record in the Centre Portal and describe the problem.

This will send a message to the Centre Services team, and this can be checked for you.

Ordering copies of documents

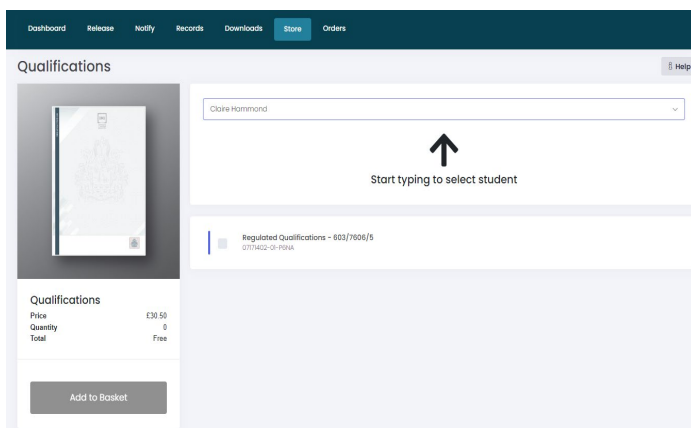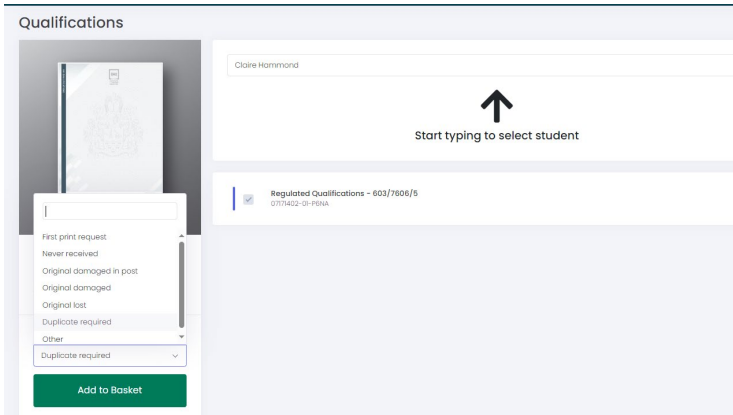Printed copies of documents can be ordered on the portal by

1. Clicking on the "Store" menu item and select the product you wish to purchase.
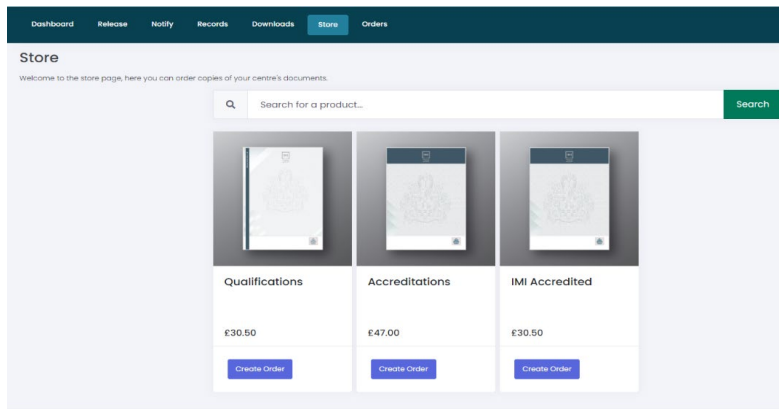
2. Select the learner for which you wish to order

3. Tick next to the printed document you wish to order and select the reason for the duplicate from the drop-down list and click Add to Basket

4. Selected items are placed into your basket - see the basket icon at the top right of the screen. You can select documents for multiple learners in a single order. When you have finished your selection, click on the basket to view items in your basket, make any changes and then checkout.
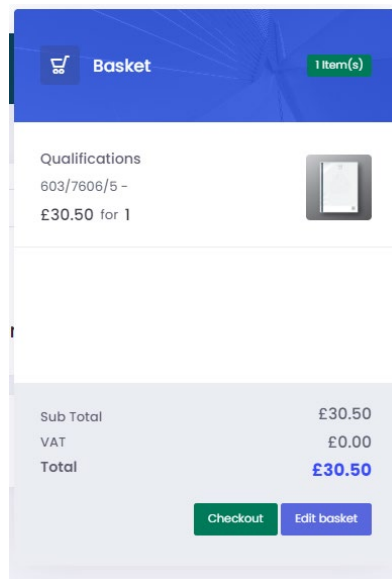
5. During the checkout process you will be prompted to add or confirm the billing and delivery address.
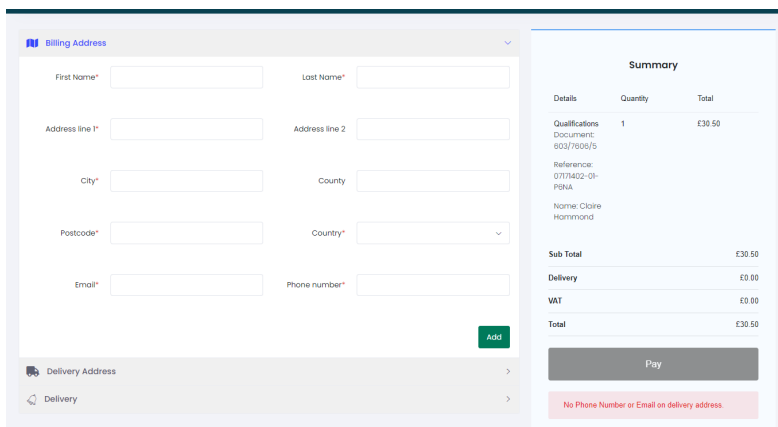
6. You will need to complete a Billing Address, a Delivery Address and a Delivery section in the Checkout screen
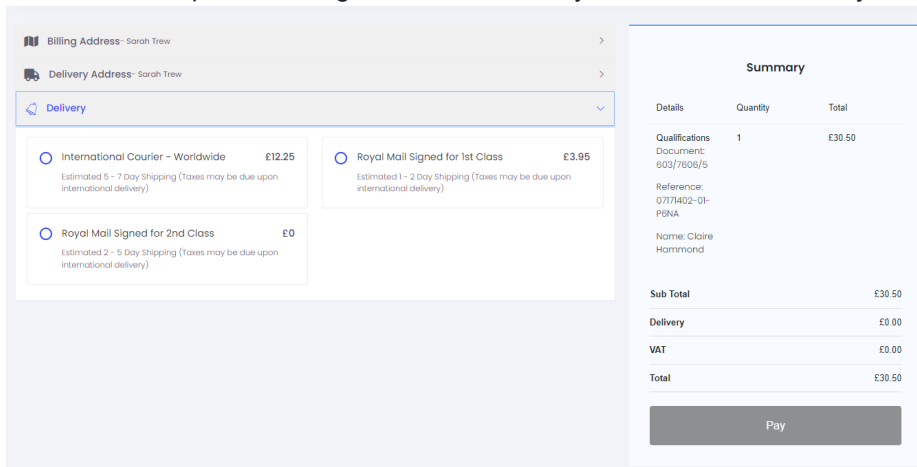

7. Upon clicking on pay, you can choose to pay either by credit or debit card using Sagepay or you can select to use your centre credits where you will be invoiced subsequently for any documents for which there is a charge.
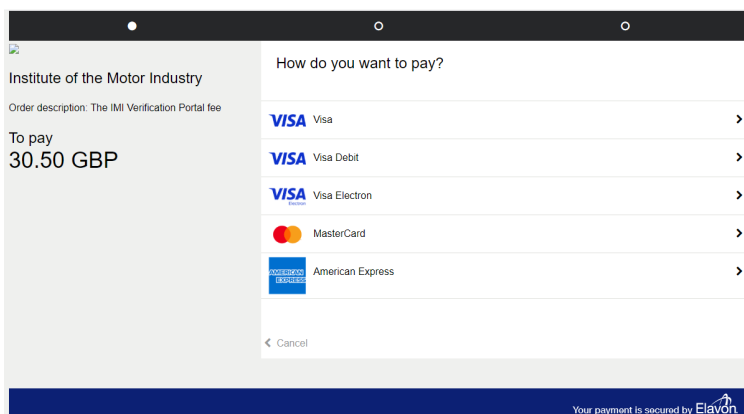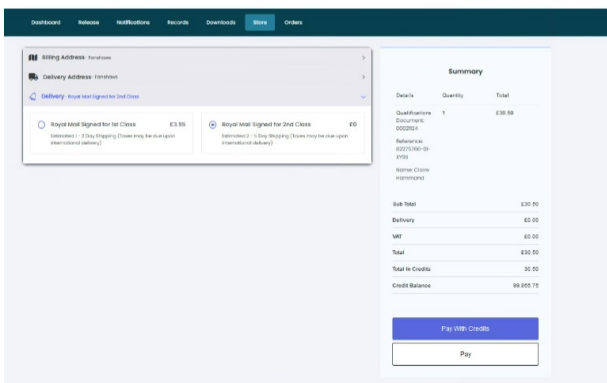
8. You will receive an email once your order has been placed. You can view the status of your order by going to the "Orders" page, which shows a list of all orders you have placed.

Sharing Documents

The documents issued to the Centre Portal are official documents of the IMI and are equally as valid as printed documents.

As such, your learners can share these with another person / company, this allows that person / company to verify the achievement conferred by the document shared. For example, if a learner needs to show a certificate to a potential employer, rather than providing the physical certificate it is much easier for the learner to simply share their digital document with the potential employer

Documents are shared with third parties through the Learner Digital Achievement Portal.

To do so:

- The learner creates a connection giving permission for the third party to log in and view the qualification to verify its authenticity.
- The learner should click on the manage button under the Connections section on the dashboard and then click "Add Connection" button (Top right).
- The learner will need to provide the name and email address of the connection and will also be asked how long they wish to allow access for.
- Once they have set up a connection with a third party, the third party will also need to register to use the system and will then be able to see and verify the documents they have been given access to.

It is only the learner that can share documents - this cannot be done by anyone else, including Centre users.

A third party can also request to view a learner document by making a connection request.

- When a third party makes a connection request the learner will receive an email notifying them.
- The learner should then log into the portal and under the connections option they will have a pending connection.
- The learner clicks on the manage button and then clicks the tick icon under the actions section to accept the connection.
- The learner can then select the documents they wish to share with the third party.
- The third party will then receive an email notifying them that the request has been accepted and will be able to log in and view the documents that have been shared.
- If the learner does not want to share a document, they can decline / reject the connection request.

QR (Smart Verify Plus) code

Secure documents are protected by a Smart Verify Plus (QR) Code which provides real-time information about the status of the document. Scan this code using the camera on a smartphone or tablet and the Smart Verify Plus portal will launch.


This will show the status of the document, confirm key information about the document and (if enabled) display the digital document itself. This can be used for verification of physical documents and is a powerful way to protect the documents that have been issued to you as a centre and your learners.

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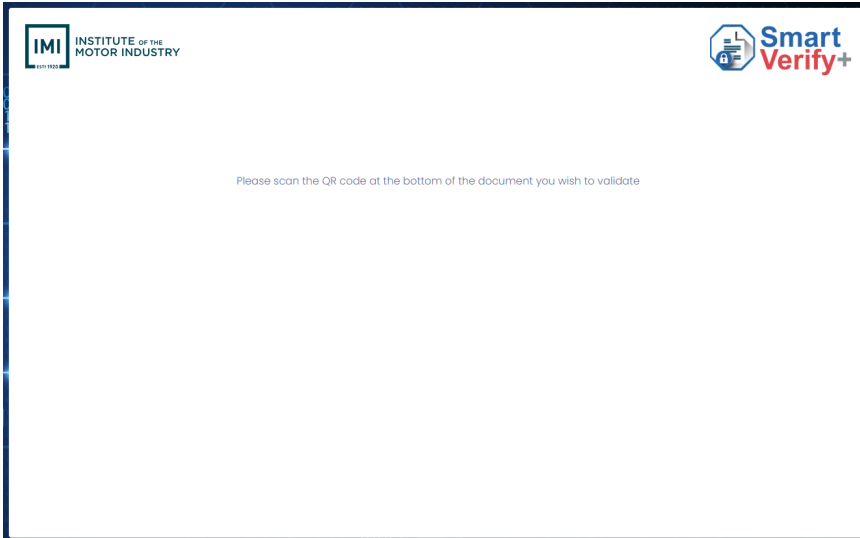
Registration and User Account

1. If you wish to deregister from the portal, please email us via Centres Hub using an Enquiry Form and we will delete your account
2. If you wish to change your personal details.
   o Click the 'View and Edit My Profile" button under the profile section and update the details you require, saving them once complete. If you choose to add an address to your profile, this can be used as a billing address and/or delivery address when ordering printed copies of documents.
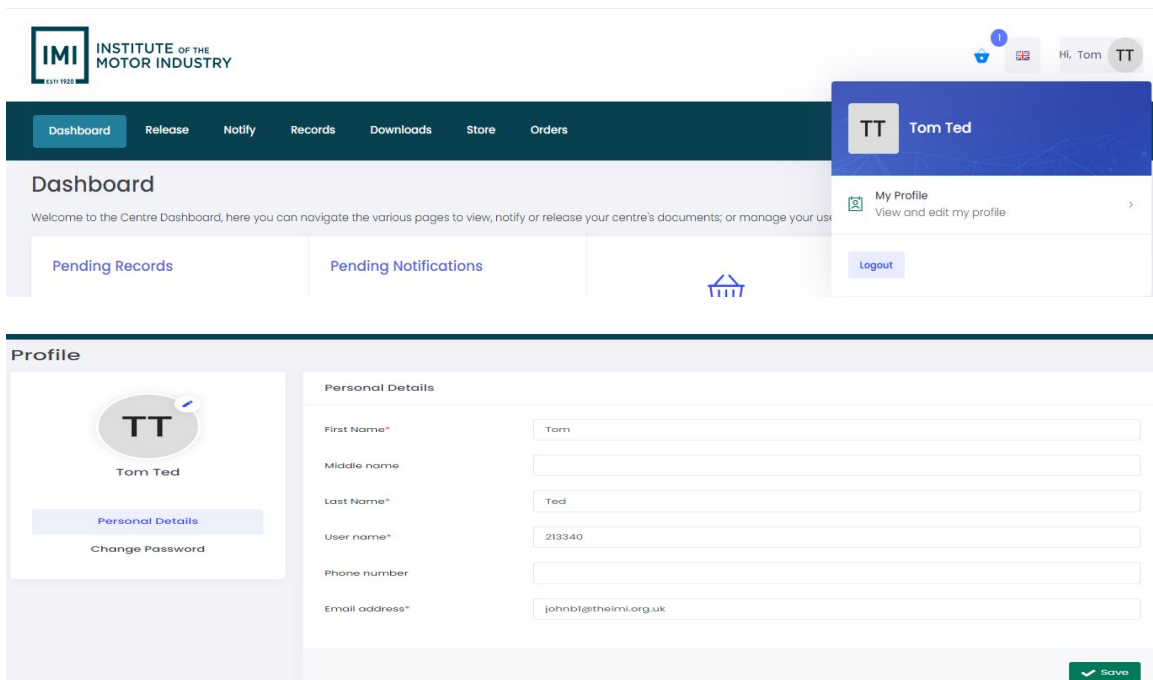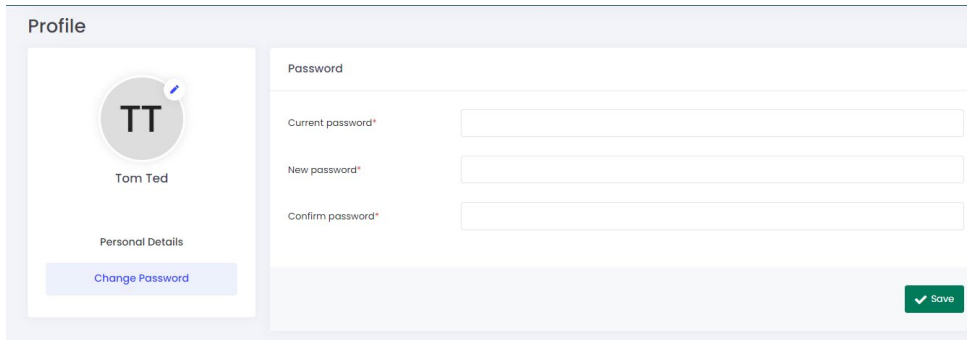

PLEASE NOTE: Updating your contact details in the Centre Portal will NOT mean that your details are also updated on the Centres Hub.

3. If you wish to update any of your details on the Centres Hub please contact us using the details on the support page
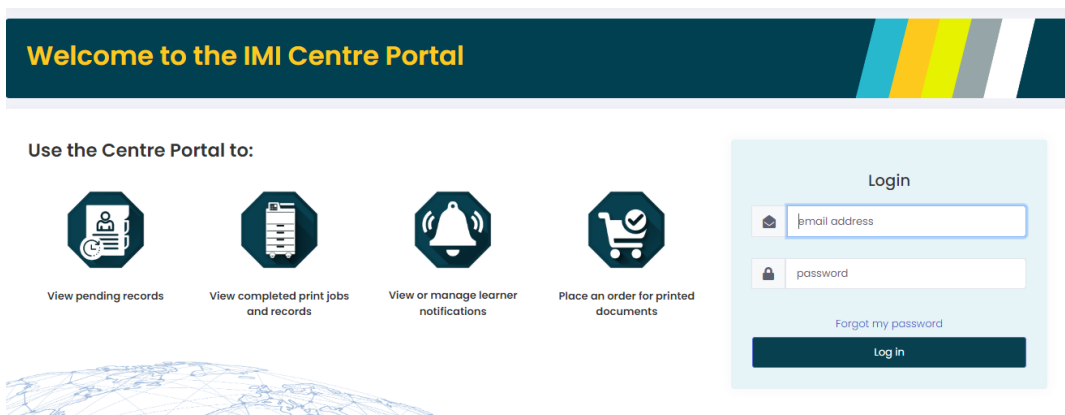
4. If you wish to change your password

Click the "Manage" button under the profile section and the change password option. Update your password as required and click the save button.

5. If I have forgotten my password

Click on the "forgot my password" link on the log in page and follow the steps to reset your password.

<u>Support</u>

If you need any help using the Centre Portal - please contact us via Centres Hub using an Enquiry Form.

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