# Learner Digital Achievement Portal Guidance Document

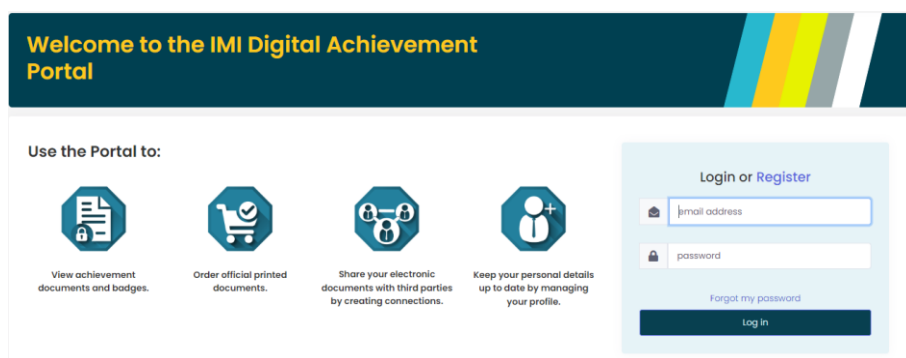<u>About the Digital Achievement Portal</u>

The digital achievement portal is an online portal on which you can view achievement documents that have been issued to you, share those documents electronically with others and order duplicate printed copies. The digital achievement portal can be accessed on any device, PC, laptop, tablet and mobile phone.

There is no charge for using the Digital Achievement Portal to view or share documents. There may be a cost associated with ordering printed duplicate copies of documents via the portal.

<u>Accessing the Digital Achievement Portal</u>

**To access the Digital Achievement Portal for the first time**, you need to register. The key steps to register and further access the document(s) are as follows:

1. Click on the Register button and fill in the requested registration details.

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1. Once the registration process is completed, verification link will be sent to your email.

2. Click the verification link to verify your account. The details you provided during the registration process will be compared with the system records.

3. Once details are matched, you will be automatically approved to access your documents. If any of the information you supply does not match the details held in the system your registration will be reviewed by an administrator before access is granted.

**If you had an account on the old eModule or veri.theimi.co.uk website**, then you will need to use the forgotten password route on the new Digital Achievement Portal.

**If you haven't received the email to confirm your email address** after completing the registration process, 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 on cas@theimi.org.uk or call 01992 511521 providing your name, date of birth and IMI candidate or membership number.

During the registration process the information you provide is matched with the information we hold for you. If any part of the information provided does not match, we will send you an email saying your account registration must be checked and approved. Once the account has been checked your account will be released and you will be able to log in.

Once you have registered and created an account, you can log in using your username and password. Note: you will need to register to use the portal before you can log in.

<u>Documents</u>

Once logged in you should be able to view your achievement documents.
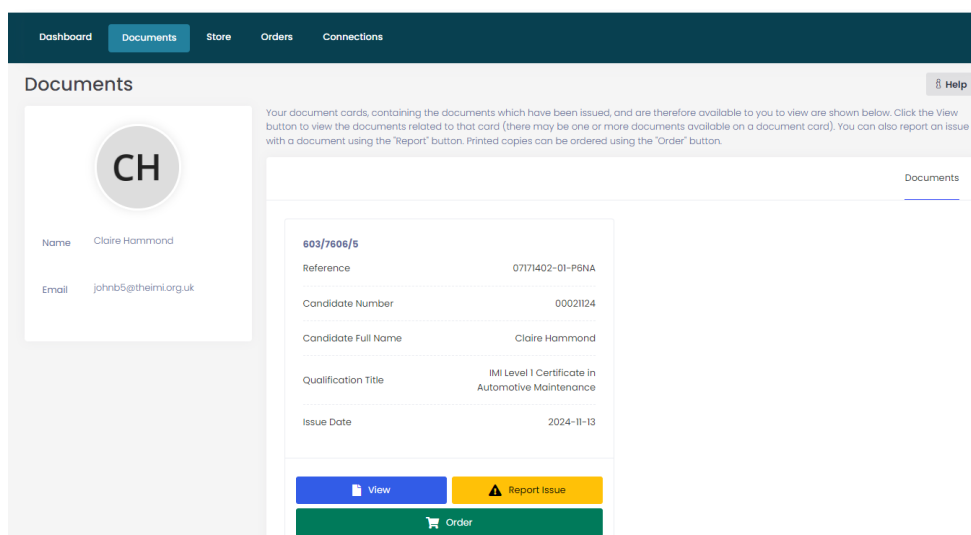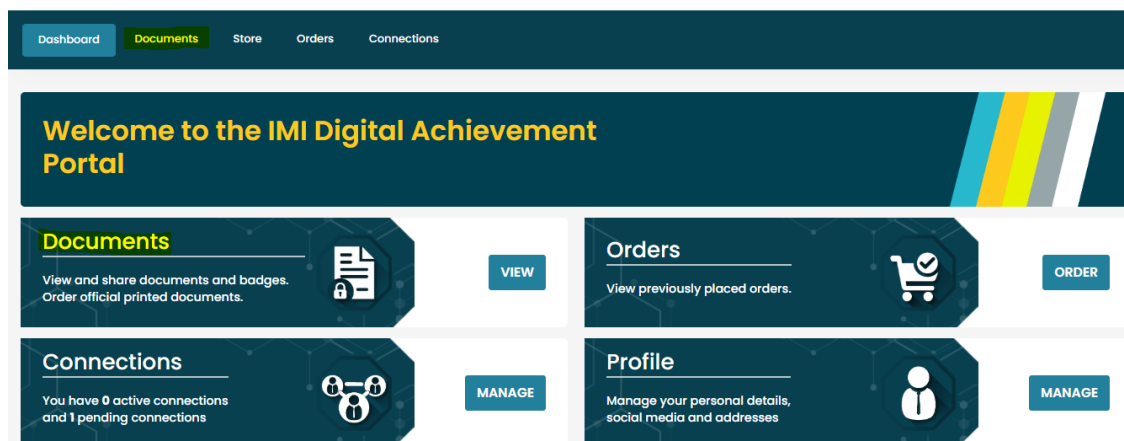
**If you cannot see any documents**, this can be for one of two reasons:
1. You have created the wrong type of account (e.g. a third-party account instead of a digital achievement account)
2. There are some errors in your account information.

   Either way, please contact us at cas@theimi.org.uk

Whenever a new document is available to view on the Digital Achievement Portal you will be sent an email informing you that the document has been issued.

The digital documents issued on the Digital Achievement Portal are official documents of the IMI and are equally as valid as printed documents. The portal allows you to access and view a digital version of your document and enables you to share that document with any other person. By design, these digital documents are not intended to be downloaded or printed, and if printed or downloaded are not valid documents outside of the portal.

**If you wish to order printed documents**, the key steps are as follows:

1. Either navigate to Document tab and click the Order button relating to the relevant qualification
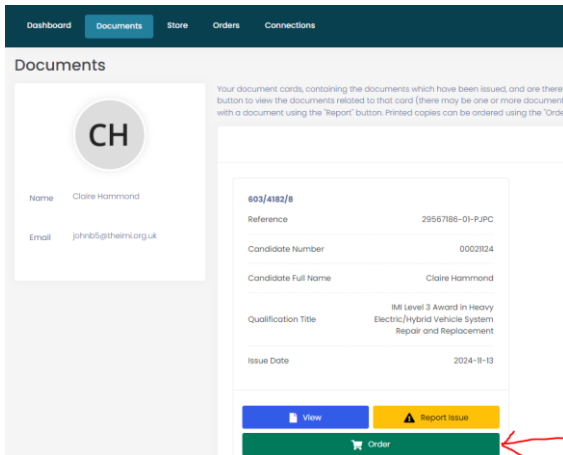
Or navigate to Store tab and select the product you wish to purchase.
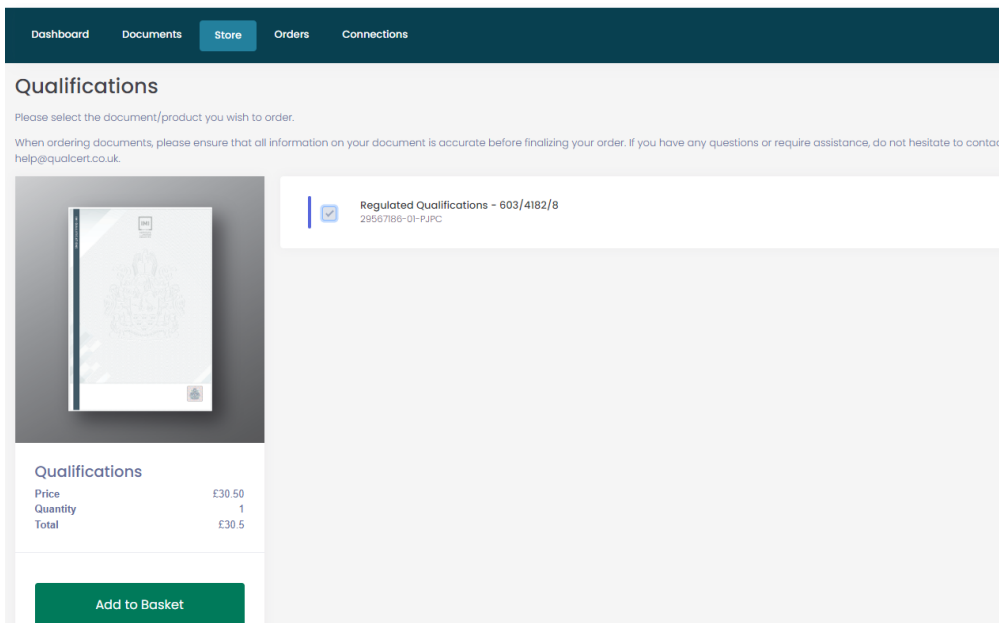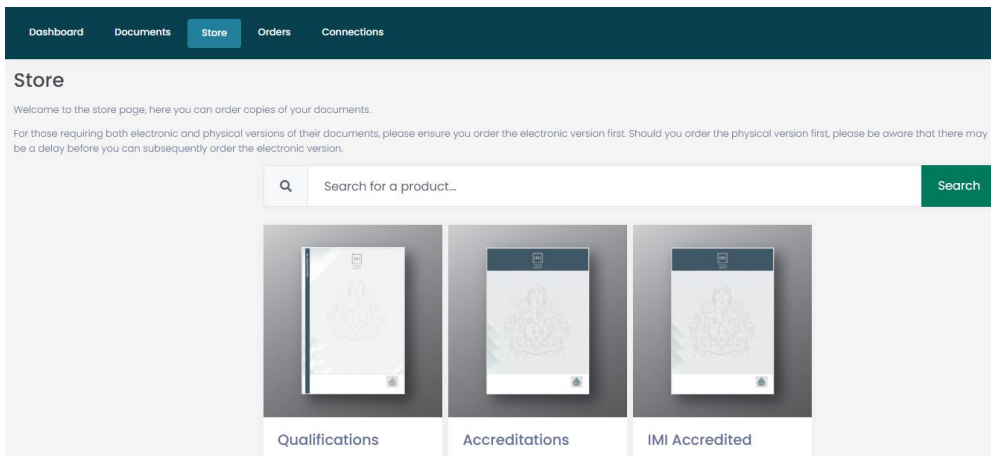




2. Once products are selected, they will be displayed in the basket icon located at the top right corner of the screen.

Hi, Claire  CH

Dashboard  Documents  **Store**  Orders  Connections

3. Select the basket to view your items, make any necessary changes, and proceed to checkout.



4. During checkout, confirm or add your billing and delivery address.

The available options for delivery, based on the delivery address will appear in the delivery section.

5. Make payment via debit or credit card.
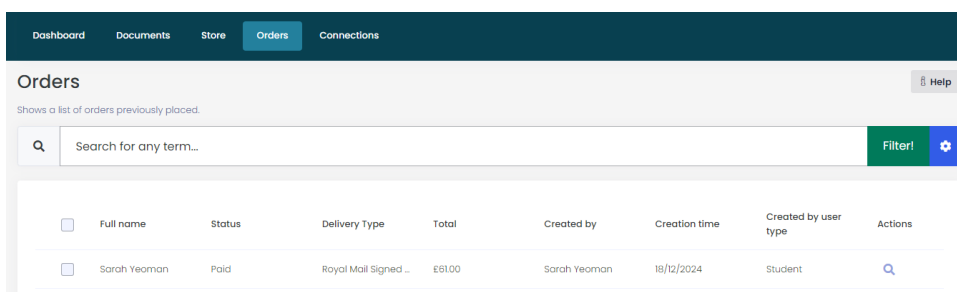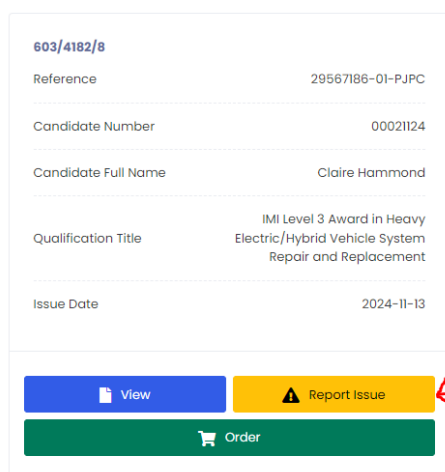


6. Once order is placed, you will receive an email notification.
7. You can check your order status on the "Orders" tab, where all your orders are listed.



**If you think something on your document is incorrect** then use the Report function (yellow button) in the view documents section of the Digital Achievement Portal and describe the problem. This will send a message to the team and can be checked for you.



The documents issued to the Digital Achievement Portal are official documents of the IMI and are equally as valid as printed documents. As such, when you share these with another person / company, this allows that person / company to verify the achievement conferred by the document shared. For example, if you need to show a certificate to a potential employer, rather than providing the physical certificate it is much easier to share your digital document with the potential employer. This is termed 'Connections' in the portal

Connections

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The Digital Achievement Portal allows you to establish a connection with a third party, this can be an employer, university or industry auditor. When you create a connection with the third party, you can share your documents with them for them to verify electronically.

The key steps to create a connection are as follows:

1. Navigate to the Connections tab and select Add Connection
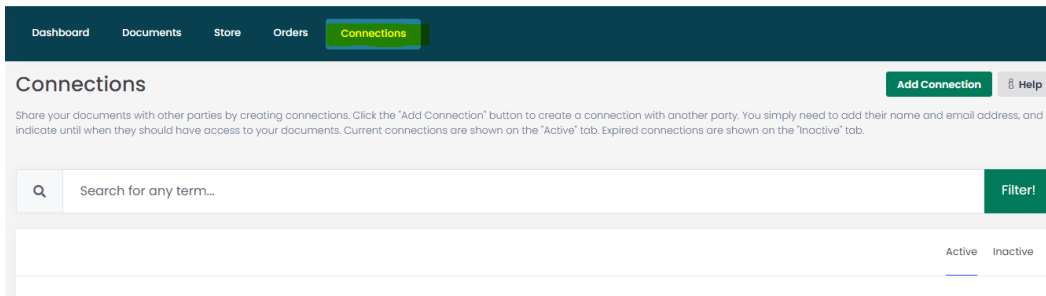


2. Enter the third-party name and email address
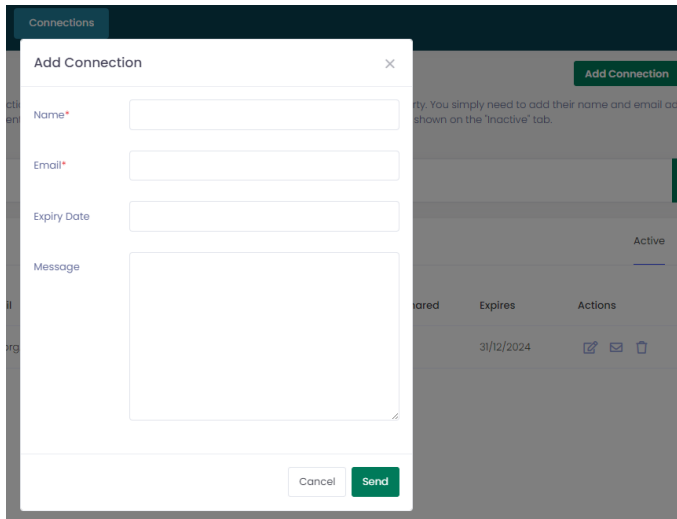


3. Add a date on which you would like the connection to expire (optional). If left empty, it will set the date to be a month after the connection is initiated

4. Select Send

5. Use the checkboxes to select the documents you want the third-party to have access to

6. Select Share Documents

Once the third party accepts the connection, the status will change from Pending to Active.

**If the third party has not accepted your connection**, please contact them directly. Please share full name and email address of your account, so they can easily locate you on the Service.

**When you create a connection, you can specify an expiry date for the connection or if left empty**, it will set the date to be a month after the connection is initiated. In case the connection has expired, you can extend it by following the steps below:

1. Navigate to the Connections tab / select Manage next to Connections menu on the Dashboard



2. Locate the third party for whom you want to extend the connection

3. Click on the Extend Connection icon (clock icon) under Actions

4. Select a date and click save

**If you have established a connection with a third party, but they cannot see any documents**, or you want to change the documents that are visible to them.

You can edit the documents that each third party has access to at any point by:

1. Navigate to the Connections tab / select Manage next to Connections menu on the Dashboard



2. Locate the third party for whom you want to share the documents

3. Select the edit permissions icon under Actions



4. Check or uncheck documents

5. Select Share documents

Registration and User Account

**The date of birth section does not allow users to manually type in their date of birth**. To select your date of birth easily, without too many clicks, please click on the month to change the view to year and then decade. You will then be able to navigate to your year of birth without too many clicks. If you cannot manage this, please set it to the correct date in the current year and then email us at cas@theimi.org.uk   with your full name and date of birth.

**If you cannot find your candidate number**, which you need to register, please email us at cas@theimi.org.uk  with your full name as it was when you were a learner, date of birth and the course you studied.

**If you wish to de-register from the portal**, please email us at cas@theimi.org.uk   and we will delete your account.

**If you wish to update your personal details on your account**, please click the "Manage" 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 Digital Achievement Portal will NOT mean that your details are also updated on your learner record. If you wish to update any of your details, please contact us using the details on the support page

**If you wish to change your password**, please click the "Manage" button under the profile section and the change password option. Update your password as required and click the save button.

**If you forget your password**, click on the "forgot my password" link on the log in page and follow the steps to reset your password.

Support

**If you need help using the Digital Achievement Portal**, please contact us via call 01992511521 or email us at cas@theimi.org.uk