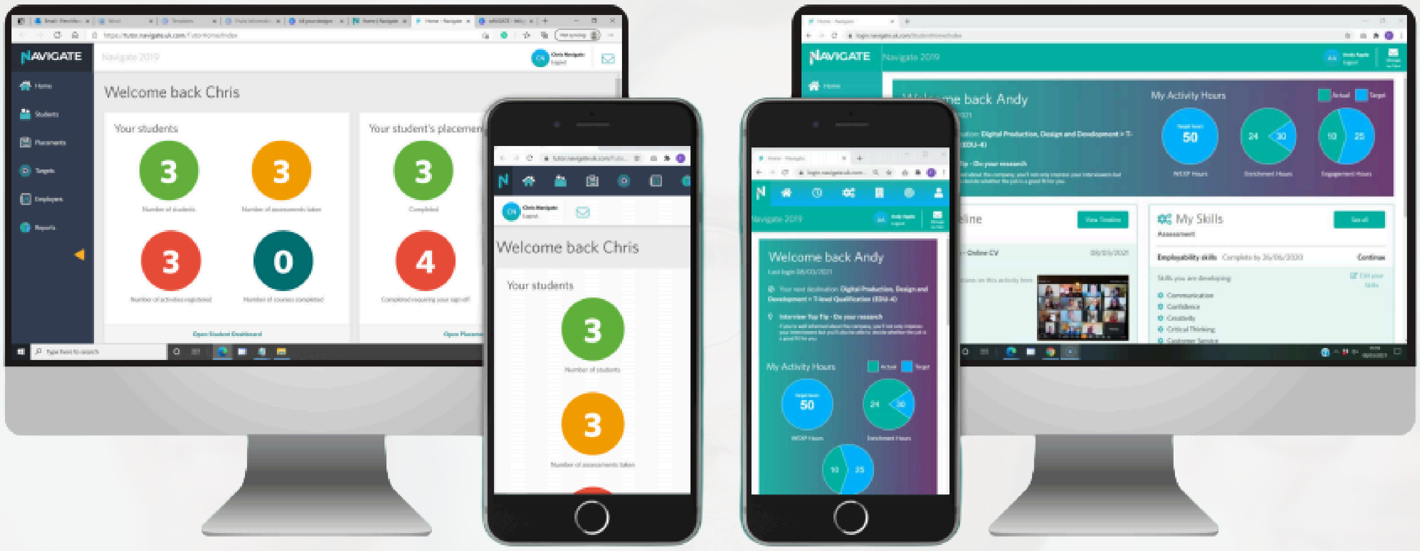
A How To Guide

EMPLOYERS MODULE

For Work and Industry placement coordinators

NAVIGATE

The Employers Module



Key Benefits for WEXP and IP Coordinators

The Navigate staff site is a powerful task-management tool providing you with an instant view of outstanding tasks, and quick intuitive ways to complete them.

- Navigate automates key elements of the placement process, including all communications between you and employers, saving on average 1.5 hours of admin time per placement.
- Each placement is clearly presented in a one-page view allowing you to easily view important placement details and track the placement progress.
- You can record meetings, interactions, and documents against placements and employers. This ensures all important information is captured in a single space.

Key Benefits for Learners

Navigate provides learners with an engaging mobile-first site where they can easily record and manage their placements.

- Learners can quickly log their placement attendance by completing placement journal entries straight from their phones. They are encouraged to upload photos, videos, documents, and other supporting evidence.
- The psychometric skill assessment makes learners aware of the impact their placement has had on their skills development.
- Learners can easily submit details of self-found placements by completing an intuitive step-by-step online form.

NAVIGATE

How to Search, Add, Approve and Manage Employers

1

Logging in

Log in to Navigate. You can do this by clicking on 'Sign in using Microsoft' or 'Sign in using Google'.

2

Access the Employers Module:

- On the Navigate staff site, click on the "Employers" module

Adding a New Employer: a. Search for the employer first:

3

- Click the "Search for an employer" button in the top right corner
- Enter the employer's name and search
  - If the employer doesn't exist, add a new one:
- Click the "Add an employer" button
- Fill in the employer's details:
  - Name
  - Address
  - Postcode
  - County
  - Business type
  - Status (Target, Active, or Inactive)
  - Click "Save"

Add Contacts to the Employer:

4

- Click "Add contact"
- Fill out the contact's information
- Save the contact
- Repeat for additional contacts if necessary

Manage Contacts:

5

- To archive a contact, click the "Archive" button next to their name
- Archived contacts can be found under "Archived contacts"
- To unarchive, click the "Unarchive" button

Manage Compliance:

6

- Scroll down to the "Compliance" section
- Click "Yes" to enable compliance management
- Enter the following information:
  - ELI approval date
  - ELI expiry date
  - Health and Safety approval date (if applicable)
  - Health and Safety expiry date (if applicable)
- Add any compliance notes (e.g., ELI number)

7

Track and Manage Employers:

- Use the three panels in the Employers module:
    - a. Placements going live against non-compliant employers
    - b. Overall compliance status
    - c. Employer status (Active, Target, Inactive)
- Click on sections of the charts to view detailed lists of employers

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Use the Employer Search Tool:

- Click "Start" on the Employer Search Tool
- Enter a postcode and select a radius
- Choose business sectors from the dropdown menus
- Click "Add sector and view results"
- Browse through the list of employers
- Click "More" to view additional information about an employer
- Click "View employer details" for in-depth information
- To add an employer to your database, click "Add new employer record"