Training Provider Onboarding Pack

Last updated: 13 January 2025

Contents

Overview Videos

Please watch these videos first to help you familiarise yourself with the look and feel of the platform and then read the rest of the guide below to better understand the new Link digitisation functionality.

Video 1: **Consent and training delivery set-up**

This video provides a comprehensive guide on creating a training delivery. From initial setup to finalisation, you'll learn step-by-step how to create a training delivery efficiently.

Video 2: **Training delivery dashboard & course completion**
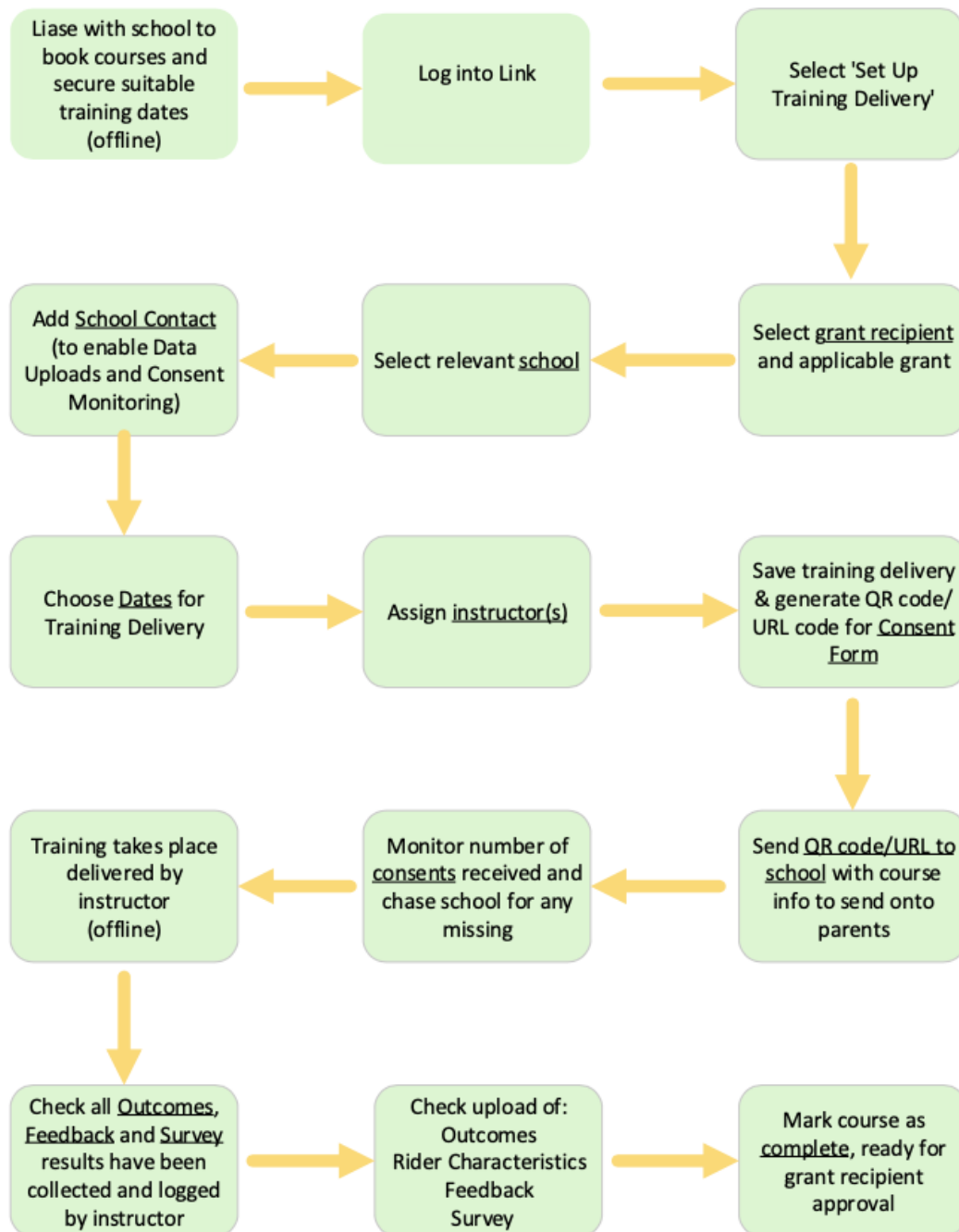
This video takes you through your dashboard and explains how to access and record all necessary details up to a course completion.

To better support your instructors and schools, you may also wish to watch the following two videos:

- ♦ **Video:** **Instructor App walkthrough**
- ♦ **Video:** **School login and course management**

End to end process overview

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┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│ Liase with      │      │                 │      │                 │
│ school to       │      │                 │      │ Select 'Set Up  │
│ book courses and│ ───► │ Log into Link   │ ───► │ Training        │
│ secure suitable │      │                 │      │ Delivery'       │
│ training dates  │      │                 │      │                 │
│ (offline)       │      │                 │      │                 │
└─────────────────┘      └─────────────────┘      └─────────────────┘
                                                           │
                                                           ▼
┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│ Add School      │      │                 │      │                 │
│ Contact (to     │      │                 │      │ Select grant    │
│ enable Data     │ ◄─── │ Select relevant │ ◄─── │ recipient and   │
│ Uploads and     │      │ school          │      │ applicable grant│
│ Consent         │      │                 │      │                 │
│ Monitoring)     │      │                 │      │                 │
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      │
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│                 │      │                 │      │ Save training   │
│ Choose Dates for│      │ Assign          │      │ delivery &      │
│ Training        │ ───► │ instructor(s)   │ ───► │ generate QR code/│
│ Delivery        │      │                 │      │ URL code for    │
│                 │      │                 │      │ Consent Form    │
└─────────────────┘      └─────────────────┘      └─────────────────┘
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┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│ Training takes  │      │ Monitor number  │      │ Send QR code/URL│
│ place delivered │      │ of consents     │      │ to school with  │
│ by instructor   │ ◄─── │ received and    │ ◄─── │ course info to  │
│ (offline)       │      │ chase school for│      │ send onto       │
│                 │      │ any missing     │      │ parents         │
└─────────────────┘      └─────────────────┘      └─────────────────┘
      │
      ▼
┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│ Check all       │      │ Check upload of:│      │ Mark course as  │
│ Outcomes,       │      │ Outcomes        │      │ complete, ready │
│ Feedback and    │ ───► │ Rider           │ ───► │ for grant       │
│ Survey results  │      │ Characteristics │      │ recipient       │
│ have been       │      │ Feedback        │      │ approval        │
│ collected and   │      │ Survey          │      │                 │
│ logged by       │      │                 │      │                 │
│ instructor      │      │                 │      │                 │
└─────────────────┘      └─────────────────┘      └─────────────────┘
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Link User Guide

Introduction

This document is intended for training providers to use Link to set up and administer the process of setting up training deliveries, customise consent functionality, monitor course progress and mark courses complete, ready for grant claims. Separate user guides are available for instructors, grant recipients and schools/organisations.

Recommended Browsers

Please use Chrome, Edge or Firefox on PC and the same browsers or Safari on Mac/IOS. Link is optimised for and best viewed on desktop devices. JavaScript must be enabled in your browser to ensure that all functionality works within Link. Link will display a message if JavaScript is not enabled.

Two Factor Authentication

Access to the Link server requires two factor authentication. You may authenticate access using either Google Authenticator or by receiving an email with a Link to your email account. Google Authenticator is available from the Apple App Store or via Google Play. We recommend Google Authenticator if possible as this allows instant access. Simply scan the barcode displayed on Link to quickly set-up the app.

At first login, you will be asked to choose your authentication method and to change your password to one that conforms with our basic password requirements. Passwords must have at least 8 characters, 1 capital, 1 numeric and 1 special character. If your existing password does not meet these requirements, you will be asked to set a new password at first login.

Reauthentication is required at regular intervals, when you change your authentication method or when you attempt to login from a new device. Once you have set up your password and authentication method, you will be asked to sign in with an authentication code.

1. First update your password to comply with our basic password rules.

My profile

Update Profile   2FA Method

Update Profile

We are enhancing our security as a part of the digitisation project roll out and applying some basic rules for passwords and requiring Two Factor Authentication (2FA) to login.

Please can you:

- 1. Update your password and then
- 2. Select a 2FA method on the second tab. You will need to enter your 2FA code when you next login.

First Name

Simon

Last Name

Howarth

Email

s.howarth@chorleyssp.co.uk

New Password

Confirm New Password

Mobile Number

*Passwords must have at least 8 characters, 1 Capital, 1 numeric and 1 special character

Landline Number

UPDATE

2. Then select your preferred two factor authentication method. We recommend using the Google Authenticator app as some organisations have aggressive antispam settings that can sometimes prevent 2FA emails from getting through. If selecting Google Authenticator, scan the barcode or enter the code to add your device and then provide the authentication code to complete set-up.

My profile

Update Profile   **2FA Method**

Two Factor Authentication

Two-Factor Authentication (2FA) is now enabled on your account. Please choose either email or Google Authenticator for two factor authentication. Authenticator can be downloaded from Google Play or the IOS App Store and is a quick and easy way to access your verification code.

○ Email

○ Google Authenticator
Download Google Authenticator from Google Play or the IOS App Store

3. You will be automatically logged out once you have selected your validation method and will need to supply a verification code at next login.

Link Server Login

https://link.bikeability.org.uk

Training Server

Familiarisation

A training server is available for you and your instructors to familiarise yourselves with the digitisation processes. We recommend that you use this initially to create a test training delivery along with a dummy contact at a school, add some dummy consents, add instructors and then allow your instructors to familiarise themselves with the Instructor App, recording outcomes for your dummy riders along with feedback and survey answers before marking the course complete. You'll then be able to see the test data that they submit and familiarise yourself with the process of marking the training delivery complete, ready for a grant claim.

This process is important so that all staff involved feel confident in the use of Link and the Instructor App prior to live training set-up and delivery. It will minimise support questions and lead to efficient completion of courses.

Important: Use dummy data on the training server only. This server will send emails so do not use live school contacts during familiarisation, so use a personal email on consent to see what information is sent to parents.

The pilot server does not send parent pre course and post course emails. If you wish to see the feedback that will be sent to parents post course, then please use the link at the end of the individual's outcomes record.

Link Training Server Login
https://pilot.link.bikeability.org.uk

Please use your normal training provider credentials to access this server. This is a copy of data from the live server for testing and familiarisation only. Only create test training deliveries on this server and use dummy data for any school contacts or consents that you enter to allow for app testing. Only users associated with the training provider account will be able to login and create/administer training deliveries

Instructor App Training Site Login
Use the pilot version of the Instructor App to select riders, record outcomes and mark courses complete. See the Instructor App User Guide for detailed instructions on app use.

Process Overview
1. Use Link to create a new digitised training delivery
2. Add instructors to your training delivery so that they can see the training delivery and associated information in the Instructor App.
3. Add school or organisation contacts so that they can monitor consents, confirm the final booked figures and add notes against individual riders.
4. Use the QR code/URL to capture consent by including in information sent to parents.
5. Use Link to monitor consents received and outcomes recorded by your instructors whilst delivering.
6. Once the training delivery has taken place and your instructors have recorded outcomes, mark the training delivery as complete, ready for grant claims.

Training Provider Profile Consent Options

Overview
Consent forms can be customised with the following information:

- A checkbox and URL link to accept your terms and conditions.
- Add up to two additional bespoke questions to the consent form.
- An option to capture all rider characteristics during the consent process, including pupil premium and ethnicity.
- An option to allow non-riders to pass through the consent process even if a Learn to Ride course is not scheduled for the training delivery.

Accessing the consent options
On your training provider main page, select the 'Consents' tab along the top.
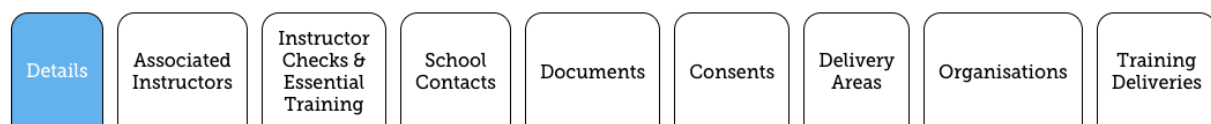
Adding Terms and Conditions
You can add the URL link to your training provider terms and conditions if you have these on your website/online. You will then have the option to add this link to the consent forms.

Adding Additional Questions
You have the option to specify up to two questions that will be available for selection during your training delivery set-up. These chosen questions will then be displayed on parental consent forms. This is the opportunity to add questions such as asking if the child has a cycle and/or helmet. Once consent is received, you will be able to download answers to these additional questions along with other consent information.

Collecting Rider Characteristics at Consent

Some training providers collect anonymous rider characteristics direct from the school during the day that training takes place. In those cases, the lead instructor can enter that information using the Instructor App. Other training providers find it difficult to collect the information direct from schools and therefore use the consent form to additionally capture ethnicity and pupil premium numbers. Tick the box to turn on this functionality collecting characteristics during consent. The option to collect characteristics in the app will disappear in the app if this option is selected.

Allow Non-riders to Override Consent

By default, the consent process will not permit the parent/guardian of a non-rider to complete the consent process unless there is a Learn to Ride course added to the training delivery. However, some training providers have capacity during Level 1 courses to be able to cater for any non-riders that may arrive and therefore may wish to allow them to participate. Turning on this option turns off non-rider validation.

Details	Associated Instructors	Instructor Checks & Essential Training	School Contacts	Documents	Consents	Delivery Areas	Organisations	Training Deliveries

Delivery/Consent Settings

URL Link to Terms & Conditions

[   ]

Specify up to 2 questions which you may use and select on your Training Delivery Bookings and will appear on Parental Consent Forms.

Question 1

[   ]

Question 2

[   ]

☑ Collect Characteristics in Consent Form
Setting this option will apply to all deliveries and characteristics data won't be collected via the instructor app

☑ Allow Non-Riders override for Consent
Setting this option indicates that you are able to cater for Non-Riders in your training events

SAVE

Adding Organisations

To add a new organisation, choose 'Organisations' tab on your main training provider page. You may need to use this if you work for other organisations other than schools, such as Scouts, Guides or similar. Also, if you wish to run in-house events such as weekend Learn to Ride sessions, then set up your own training provider as an organisation. The nominated organisation contact will have access to inbound consent information for the course.

Ambridge Cycling Society

ID: 704606A

Related Link account(s):   Josie Walker
                            Diini Muse
                            Simon Howarth
                            System Admin
                            Eliska Peskova

Training Provider status: ● Active
Renewal status: ● In progress

Renewal due date: 1 Jun 2024

| Details | Associated Instructors | Instructor Checks & Essential Training | School Contacts | Documents | Consents | Delivery Areas | Organisations | Training Deliveries |

Organisation Name	Address	Phone	Email	
Scouts	15 London se11 3tr		Test@link.com	⋮
Test Organisation (non school)	PO Box 505 PR6 6DX	01254 832200	stchads@wheelton.com	⋮
Ambridge Cycling Society	The flatlands Cambridge CB1	01233 448899	a@b.com	⋮
Testing scouts	20 Herbert road Please Select n15 6he	07961285758	bikeabilitytest1@gmail.com	⋮

(ADD ORGANISATION)

Click on 'ADD ORGANISATION'.

Create new organistion

Organisation Details

Organisation Name

Address Line 1   Address Line 2

Town/City   Postcode

Phone Number   Email Address

Contact First Name   Contact Last Name   Contact Email Address   Contact Phone Number

(CREATE)

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Complete the required boxes with all the information from the organisation and press 'CREATE'.

Adding School Contact

To add a new school contact, choose 'School Contacts' tab on your main training provider page. Select the relevant school from the drop-down menu. Your existing contact will appear below. If you'd like to add a new contact, click on the 'Add New Contact' button.

Details	Associated Instructors	Instructor Checks & Essential Training	School Contacts	Documents	Consents	Delivery Areas	Organisations	Training Deliveries
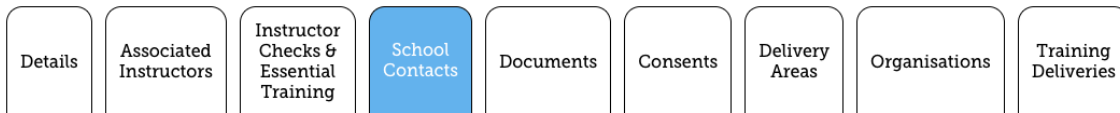
School Contacts

Schools in the dropdown list only show for those at which you have delivered Bikeability training

Bournemouth Collegiate School

Contact Type	Name	Telephone	Email	Safeguarding Lead	
Teacher	Teacher One		teacher.one@bschool.co.uk		⋮
Bursar/Office	Eliska Peskova		eliska@bikeabilitytrust.org		⋮

ADD NEW CONTACT

Populate the fields and press 'CREATE'.

Create School Contact

School Contact Details

Contact Type	First Name	Last Name
Select School Contact Type		

Email	Confirm Email	Telephone

Class Name	Year Group
	No Year Group

☐ Is Safeguarding Lead?

CREATE

Create a training delivery

Overview
Once you have a booking commitment from a school or organisation, you can create the training delivery on Link. During the set-up process, you will be asked to add the following information. The training delivery can be set up as a draft and added to later if you do not immediately have all the information available.

a. Select whether delivery is grant funded or non-grant funded
b. Select grant recipient (Local Authority)
c. Select grant (Standard or HAF (Holiday Activities and Food) training)
d. Select delivery school or organisation
e. Add school contacts
f. Flag alternate delivery location if applicable
g. Specify delivery start and end dates
h. Add instructors and any course notes/guidance
i. Add courses, year groups and anticipated number of attendees
j. Set consent cut off dates and dates for parent communication to start
k. Specify inclusion of training provider terms and conditions and/or additional consent questions

Training Delivery Set-up Process

Log in with your training provider account details.
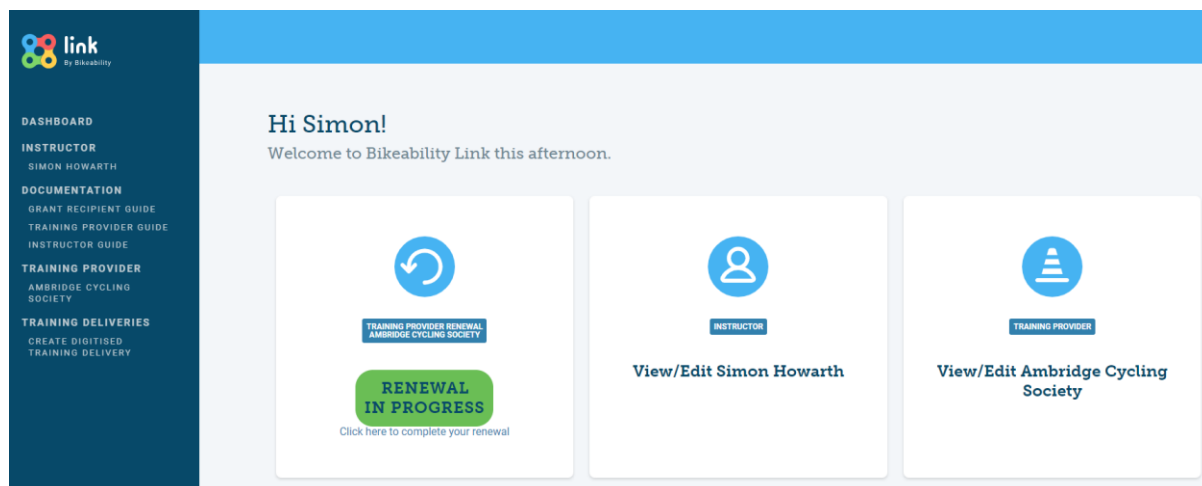
On the left-hand side of the page under 'Training Deliveries' please click 'Create Digitised Training Delivery'

Create Digitisation training delivery - Training Provider Select

Ambridge Cycling Society

CREATE DIGITISATION DELIVERY FORM

Please select your training provider name. **Note:** This dialogue will only appear if the user account is associated with more than one training provider.

Funding

You will be directed to the page below, please select either grant funded or non-grant funded.

If grant funded, continue by selecting the grant recipient and grant from the drop-down boxes. Grants are usually broken down as standard for all core delivery or Holiday Activities and Food (HAF). Training delivery dates will be constrained by the grant selected and the training delivery start date (set later) must fall within the applicable grant period.

Notes can be added at the bottom of the page (and all pages) which can be seen by instructors and the school. These can be useful if you have instructions for example "*Bottom playground/entrance is being resurfaced so please use top entrance by Smith Road and top playground to be used for delivery session*".

Create new digitisation delivery

DRAFT

Training Delivery Details

1

BACK | NEXT

Funding

SAVE DRAFT

For grant funded training please select your applicable grant recipient and grant. Any delivery start date set later in the process must fall within the grant financial year.

◉ Grant Funded   ○ Non-Grant Funded

Select Grant Recipient

Please select ▼

Grant

Please select a grant recipient ⌄

Notes: Additional notes/guidance for instructors and schools. This information will be visible in the instructor app and via the schools login.

Any observations or notes about this delivery

BACK | NEXT

Click 'Next'.

Host
Select a delivery school, when selecting schools either type in the URN or begin typing the school's name for options to select. Once you have completed this, scroll down to school contacts.

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Training Delivery Details

1 ——————————————— 2

Funding | Host

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SAVE DRAFT

Find schools quickly by using the school URN if you know it. Otherwise, please search for your school and verify that any school selected is the correct school for your delivery. If you are delivering to another organisation type then please select from the list of existing organisations for your training provider or create a new one. If the training is to be hosted solely by your training provider then please set-up the training provider as an organisation so your event organiser can login and view/manage consents.

◉ School   ○ Organisation

Delivery School

| Bournemouth Collegiate School, Bournemouth (113937) | ✕ ▼ |

Please use a URN for quickest results or type at least 3 LETTERS of the school name or postcode.

School Address

College Road

Bournemouth
BH5 2DY

School Contacts

Review Contacts at the School relating to this Training Delivery

Select your contacts from the existing school contacts below

| Eliska Peskova (Teacher) ✕ |
| Click to select contacts from a drop down list |

Add new contacts

To add a contact, click on Add Contact, complete the contact details and then click to Create the new contact. This contact will then be added to you list of contacts above for this delivery.

Contacts added in the form below will be provided with a user account to login and will receive an e-mail inviting them to Bikeability

ADD CONTACT ROW

In the first box select the school contact that you wish the email confirmation to be sent to. If you need to add another contact, then scroll down to 'add contact row' button and fill in all the boxes.

OR

Select or create a new organisation.

If you have not already created an organisation, you will be able to create one during the training delivery set-up process. If you have previously set up organisations that you work with, you will be able to select an existing organisation from a drop-down menu. Additional organisations can be set up and managed via the organisation tab in the training provider profile.

Venue

Please check the delivery location address and click 'Next' to continue if correct.

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Training Delivery Details

1 ───── 2 ───── 3

| Funding | Host | Venue |

BACK NEXT

SAVE DRAFT

If the training is to take place at a different location to the host organisation, then please add details of the address and venue below.

Delivery Location
The default delivery location for the selected school or organisation is

College Road

Bournemouth
BH5 2DY

Alternative Delivery Location
Will this be delivered somewhere other than at the selected school or organisation?

○ Yes ◉ No

Notes: Additional notes/guidance for instructors and schools. This information will be visible in the instructor app and via the schools login.

Any observations or notes about this delivery

If the delivery will not be taking place at the same venue as the 'host' school/organisation, then this can be input by clicking on 'Yes' under the 'Alternative Delivery Location' section.

Alternative Delivery Location
Will this be delivered somewhere other than at the selected school or organisation?

◉ Yes ○ No

Alternative delivery address

Venue name

Address

Postcode

Host Contact

| Title/Position | Name | Phone Number | Email |
| Enter Contact Job Title or Position | Enter Contact Name | Enter Contact Phonenumber | Enter Contact Email |

Delivery dates

Use the boxes to complete the delivery start and end dates if known.

These dates can be left blank, for instance if you are setting up a delivery but waiting for consents to be returned in order to know the number of participants before agreeing a date. Dates can be added later. The training delivery will only be visible to instructors using the Instructor App once start and end delivery dates have been added. Click 'Next' to go to the next page.
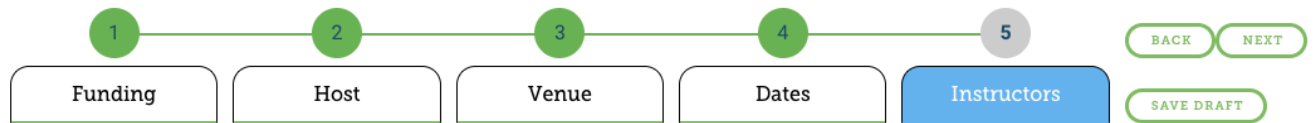

Instructors

Please assign an instructor using the drop-down, all instructors associated with you on Link will be shown in this box.

Instructors are optional during the initial booking stages and can be added in at a later date by editing the delivery. Only instructors added to a training delivery will be able to see the delivery in the Instructor App.

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Training Delivery Details

1	2	3	4	5
Funding	Host	Venue	Dates	Instructors

BACK   NEXT

SAVE DRAFT

Instructors are optional during the initial booking stages and can be added in at a later date by editing the Delivery.

*Note that instructors MUST be added to the delivery for the instructor to be notified and to receive delivery updates to their mobile device.

Assign Instructors to Delivery

Eliska Peskova (99999978/NSI) Qualification: | ×

Notes: Additional notes/guidance for instructors and schools. This information will be visible in the instructor app and via the schools login.

Any observations or notes about this delivery

Courses

You can add multiple course modules to the training delivery.

Fill in the year group and total provisionally booked for each course you select. If you are using the consent process to determine what your booked number is, you can complete the field later. A booked figure is required before a training delivery can be marked complete and a grant claim made. The final booked figures need to be confirmed by the host school or organisation. Confirmed booked numbers can be completed up to and including the end date of the training delivery.

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Training Delivery Details

1	2	3	4	5	6
Funding	Host	Venue	Dates	Instructors	Courses

BACK   NEXT

SAVE DRAFT

Training Courses to be Delivered

Course #1 (Level 1)   REMOVE

Year Group
Y5

Provisional#
6

Course #2 (Level 2)   REMOVE

Year Group
Y6

Provisional#
5

ADD A TRAINING COURSE TO THE DELIVERY

LEVEL 1   LEVEL 1 & 2 COMBINED   LEVEL 2   LEVEL 3

Consents

Insert the consent cut-off date in the first box. This date is the last date you want consents to be able to be made. After this date, consent forms being completed will get a message upon attempted completion stating that they need to contact the school/host as forms are no longer being accepted. This function can be used to limit numbers where instructor allocations have already been made and there is no capacity to accept additional trainees. The consent cut off is also useful for determining numbers where a training provider first needs an idea of numbers booked prior to confirming delivery dates and allocating instructors.

Insert communications start date in the second box. This is the date that you want the first communications/emails to be sent to school/parent/carers.

An option is also available to set the maximum number of places when a course is created and to either restrict the maximum numbers of attendees (prevent any further consents) or to add any additional ones to a waiting list. Once delivery is set up, records can be moved from the waiting list to the attendee list and vice versa on Riders/Consents tab. This function does not apply if you upload data directly, as it is expected that you will upload the maximum number of attendees that you wish to add to the training delivery.

QR Code	Courses/Consents	Riders/Consents	Outcomes	Characteristics	Post Course Survey	Fleet Cycles

UPLOAD RIDER/CONSENT DATA FROM CSV   DOWNLOAD RIDER/CONSENT DATA TO CSV

Name	Year Group	Date of Birth	Consent Status	Created By	Photography Allowed	Newsletter Opt In	
Child Five	Y6	5 May 2015	Consent Given	School	Yes		⋮
						Edit Rider	
Child Four	Y6	4 April 2014	Consent Given	Parent	Yes	Edit Consent	⋮
						Move to Waiting List	
Child Three	Y6	3 March 2014	Consent Given	Parent	No	No	⋮
Child Two	Y6	2 February 2014	Consent Given	Parent	No	No	⋮

Waiting list

Date/Time	Name	Year Group	Date of Birth	
2024-08-15 21:42:11	Child One	Y6	1 January 2014	⋮

If you have added a terms and conditions URL to your training provider profile or have created optional questions to be added to the consent form, you will be able to select them on this page.

DRAFT

Training Delivery Details

1	2	3	4	5	6	7
Funding	Host	Venue	Dates	Instructors	Courses	Consents

BACK NEXT

SAVE DRAFT
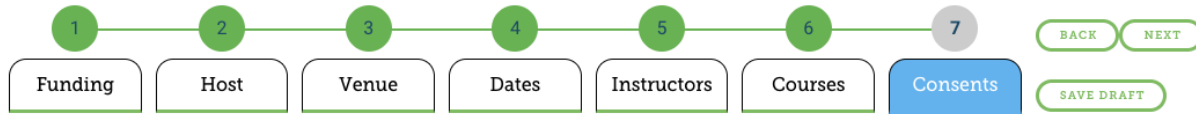
Consents and Questions

Please set a consent cut off date - the latest date at which you will accept a consent for this course. The communicatons start date is the date that The Bikeability Trust will start send emails to parents with bikes/helmets check links. IF you have set optional questions or a terms and condition URL in your training provider profile, they will appear on this page.

Consent Cut-Off Date

10 Oct 2024

Maximum No: of Consents

10

Enable Waiting List
☑

Communications Start Date

4 Oct 2024

Terms and Conditions URL

https://www.bikeability.org.uk/privacy-policy/

☑ Include T&Cs and URL Link in Consent?

Select additional questions to be included on the Parental Consent for this booking.

☐ Would you like to borrow a cycle?

☐ Would you like to borrow a helmet?

Notes: Additional notes/guidance for instructors and schools. This information will be visible in the instructor app and via the schools login.

Please note: If you would like to change your parental consent questions or terms and conditions URL, you will need to do this via your training provider account. Please click here to see how to do this.

Summary

You can now access a comprehensive summary on the dashboard. Should anything require your attention, a notification will appear at the top left corner of the page in red. This serves as a reminder to ensure that you have completed all necessary steps - whether it's adding school contacts, registering an organisation, or creating a course.

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Training Delivery Details

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| Funding | Host | Venue | Dates | Instructors | Courses | Consents | Summary |

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SAVE DRAFT

CREATE DELIVERY

Event Summary

Grant Details

Grant Recipient	Springfields Council
Grant	Springfields Test 2024/25 (2024 - #2024/999999)

Instructors

- Eliska Peskova (99999978/NSI) Qualification:

Courses & Places Booked

- Level 1 Year Group Y5 undefined places
- Level 2 Year Group Y6 undefined places

School and Delivery Location

Bournemouth Collegiate School, Bournemouth (113937)

College Road

Bournemouth
BH5 2DY

School Contacts

Eliska Peskova (Teacher)

Delivery Address

Delivery at School Address

Delivery Dates

Delivery Start Date	10 Oct 2024
Delivery End Date	17 Oct 2024

BACK

After filling out all the details correctly, you can create the training delivery. Once the delivery is created, it will automatically show up under the training provider training deliveries tab.

Make sure you save the training delivery, not just the draft, in order to create the training delivery and make it accessible for the assigned instructors in the Instructor App.

When you create a training delivery, it is saved in draft mode until a School or Organisation Contact is assigned, the Start date is set, and at least one course is added. Once these details are added and the training delivery is saved, then Link will automatically email the school/host with the training delivery details and ask them to login to confirm booked figures prior to the

start of the training delivery and the training delivery will be made accessible for the assigned instructors in the Instructor App.

View and edit training delivery

If you would like to edit your training delivery, you can go back and make the necessary changes. This section will outline the steps you will need in order to make your changes. This is especially useful if you haven't set up your delivery dates but have created the training delivery in advance, if you have made a mistake or need to change your instructor.

Delivery Details

OPTIONS ⌄

EVENT CREATED

Non Grant Funded Delivery

This delivery event has been created by Ambridge Cycling Society

Phone Number:

Email: contactus@hotmail.com

Summary

Start Date:	5 Jun 2024	
End Date:	11 Jun 2024	
Delivery Location:	Seven Sisters Primary School South Grove Tottenham London N15 5QE	

Instructors

Diini Muse 991997/NSI

Courses / Progress

Level 2 Y5   COMPLETE

DELIVERY START DATE IS AFTER TODAY.

NUMBER OF FLEET CYCLES USED FOR THIS DELIVERY MUST BE SPECIFIED.

SURVEY MUST BE 100% COMPLETE   CHARACTERISTICS MUST BE 100%

Provisional Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
5 0	0	0/0	0%	0%	0%

Example: This image is the next screen after you create your training delivery

View, Edit, Delete or Cancel a Training Delivery

Once the training delivery is completed, you can amend/view deliveries by clicking on the 'Training Deliveries' tab.

Click on the three dots on the very right-hand side next to the training delivery you want to view/amend and select either 'View', 'Edit' or 'Delete'. Only training deliveries marked as complete cannot be deleted.

When 'view' is selected you can see the training delivery information, track progress and see the parental consent QR code and URL which can be included on your letter to parents.

When 'edit' is selected you can edit any part of the training delivery. This is how you would edit the delivery to add in instructors, change contacts, add in delivery dates etc.

You also have an option to cancel a training delivery, for example in cases of an extreme weather event, or an unexpected and unavoidable disruption. Cancelling retains the booked figure but shows the attended figure as zero. In this case, any data recorded up to that point gets saved and a grant claim generated. To cancel an event, click on 'Mark Course Cancelled' button circled in red from your Training Delivery dashboard overview.

Courses / Progress

Level 1 Y1

CANNOT COMPLETE COURSE

NUMBER OF FLEET CYCLES USED FOR THIS DELIVERY MUST BE SPECIFIED.

Provisional	Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
3	0	4	4/0	100%	100%	100%

MARK COURSE CANCELLED

Only cancel a course if you have access to the Flexible funding for weather cancellations and will be submitting a claim against this, or if you have had prior authorisation by the grant team due to exceptional circumstances, to do so.

Level 1 Y1

CANNOT COMPLETE COURSE

NUMBER OF FLEET CYCLES USED FOR THIS DELIVERY MUST BE SPECIFIED.

2 RIDERS HAVE NOT BEEN MARKED AS "COMPLETED" FOR THIS COURSE.

SURVEY MUST BE 100% COMPLETE   CHARACTERISTICS MUST BE 100%

Provisional	Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
3	0	2	0/0	0%	100%	0%

MARK COURSE CANCELLED

Only cancel a course if you have access to the Flexible funding for weather cancellations and will be submitting a claim against this, or if you have had prior authorisation by the grant team due to exceptional circumstances, to do so.

Courses / Progress

Level 1 Y5

OF FLEET CYCLES USED FOR THIS DELIVERY

MUST BE 100% COMPLETE   CHARACTER

Are you sure you want to cancel this course?

You won't be able to reverse this action.

CANCEL   OK

Provisional	Confirmed Booked			teristics	Outcomes
6	0			%	0%

MARK COURSE CANCELLED

Only cancel a course if you have access to the Flexible funding for weather cancellations and will be submitting a claim agai had prior authorisation by the grant team due to exceptional circumstances, to do so.

Courses / Progress

Level 1 Y5

COURSE IS CANCELLED

Provisional	Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
6	0	0	0/0	0%	0%	0%

Training Delivery Dashboard

Once your training delivery is created, you'll be able to see the delivery dashboard. You can access the training delivery dashboard for any delivery by selecting the 'Training Deliveries' tab and clicking on the three dots to 'View' a training delivery. The dashboard is where you can access all information relating to your training delivery. You can monitor progress of the delivery from consent through to outcomes received and once all information has been submitted you will be able to complete your course.

The top of the page provides a summary of the grant recipient and grant where funded, delivery location, instructors allocated and any notes that have been added to the delivery.
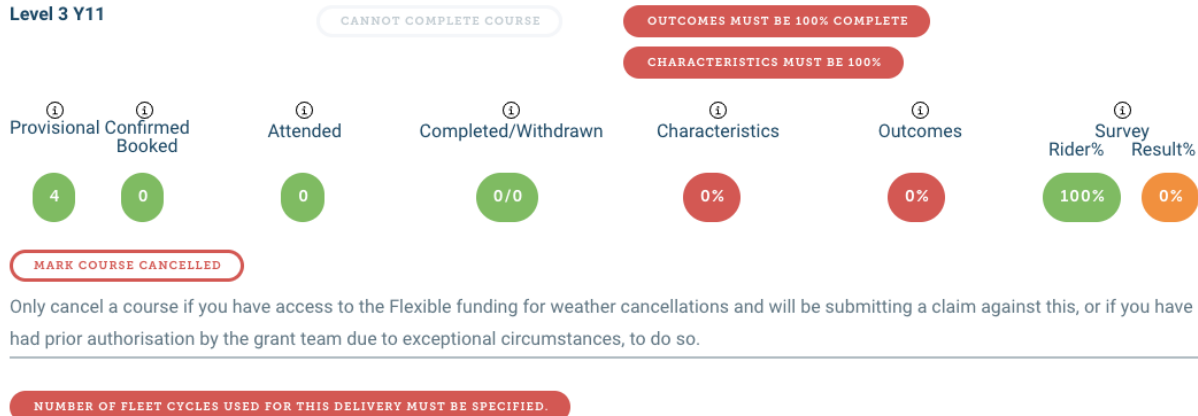

Courses/Progress

This area of the dashboard shows progress of your course. Once your instructors have recorded outcomes, surveys and given feedback on the Instructor App, you will be able to track progress on the summary page.

Mark the individual courses as complete once all of the information has been submitted. The button will be greyed out until all errors are fixed.

Courses / Progress

Level 3 Y11

CANNOT COMPLETE COURSE

OUTCOMES MUST BE 100% COMPLETE

CHARACTERISTICS MUST BE 100%

ⓘ Provisional	ⓘ Confirmed Booked	ⓘ Attended	ⓘ Completed/Withdrawn	ⓘ Characteristics	ⓘ Outcomes	ⓘ Survey Rider% Result%
4	0	0	0/0	0%	0%	100% 0%

MARK COURSE CANCELLED

Only cancel a course if you have access to the Flexible funding for weather cancellations and will be submitting a claim against this, or if you have had prior authorisation by the grant team due to exceptional circumstances, to do so.

NUMBER OF FLEET CYCLES USED FOR THIS DELIVERY MUST BE SPECIFIED.

Pay attention to and resolve any errors that are displayed on this screen before you can complete the course. A course cannot be completed until all information is present and instructors have marked the training complete for their cohort.

Note: You have the option to view the progress of each course from the Instructor point of view and support them through the process by accessing the App yourself. You can do so by visiting https://bikeability.app and using your primary training provider email address and phone number (for the receipt of 2FA text message) to log in. However, please note, that even though you can see and go through the same process of selecting riders and recording outcomes, you will not be able to save the data, only an Instructor can do so. Please refer to the Instructor Guide and watch the **Instructor App Overview** video in order to familiarise yourself with the system.

You can also access a view of the training delivery from a School's perspective. To do so, from your Training Provider dashboard, click on the three dots in the top right-hand corner and select 'View School Deliveries'.

Training Provider details

OPTIONS ∧

Ambridge Cycling Society
ID: 704606A

Related Link account(s):
Josie Walker
Simon Howarth
Eliska Peskova
System Admin
Diini Muse

Training Provider status: ● Activ
Renewal status: ● In pro

Renewal due date: 1 Jun 202

Edit details
View renewals
Buy materials
Export deliveries
View School Deliveries
View Digitisation Reports
Create Digitised Training Delivery

This will take you to a list of Schools where you have created a training delivery. Click on the name of the School you are looking for and all deliveries at that School associated with your organisation will appear, for your view only.

School Deliveries View - School Select

School Name

Abbas and Templecombe Church of England Primary School

Bournemouth Collegiate School

Castel Primary School

Chorley All Saints Church of England Primary School and Nursery Unit

Chorley Astley Park School

Mark the training delivery as complete once all courses have been completed.

Courses / Progress

Level 1 Y6

[MARK COURSE CANCELLED]

[MARK COURSE COMPLETE]

Provisional	Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
2	1	1	1/0	100%	100%	100%

To complete the Delivery and all courses (or all remaining courses) within the Delivery, click on the button below.

Completing a Delivery will result in Survey invite emails to be sent to Parent/Carers.

[MARK DELIVERY COMPLETE]

Courses / Progress

Learn Y6   [COMPLETE]

Provisional	Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
1	1	1	1/0	100%	100%	100%

Level 1 & 2 Combined Y6   [COMPLETE]

	Provisional	Confirmed Booked	Attended	Completed/Withdrawn	Characteristics	Outcomes	Survey Results
	3	4			100%		
L1	3	X	3	3/0		100%	100%
L2	3	X	4	4/0		100%	100%

To complete the Delivery and all courses (or all remaining courses) within the Delivery, click on the button below.

Completing a Delivery will result in Survey invite emails to be sent to Parent/Carers.

[DELIVERY COMPLETE]

Dashboard definitions

Provisional

This is the number of participants that you initially expect to attend.

Confirmed Booked

This is the number of attendees that the host school/organisation has confirmed will attend. This is the figure used for grant payments. Because grant funding is paid against booked numbers, the school/organisation is responsible for confirming the final booked numbers up to four weeks prior to the start of the course through to the end date of the course via either a link in the email or via the school/organisation Link login. Email reminders will be sent automatically. If the school/organisation does not confirm the booked figures, then the final confirmed booked figure will default to the attended value. **It is important that you monitor and chase the school/organisation if necessary to ensure that they confirm booked figures. If the attended value ends up being greater than the booked figure, then the booked value will be updated to the attended figure.**

Attended

The actual number of attendees for the course. This figure will be used if the confirmed booked figure is not actually confirmed prior to the start of the course.

Completed/Withdrawn

This shows the numbers completed/withdrawn.

Note: When an instructor withdraws a rider from a course, he is required to record the feedback in the App which automatically sends an email notification to the parent/guardian. You will also receive a copy of the email for your information, containing the delivery ID, school name and date of delivery, in order to easily identify the relevant training delivery. The same will happen if a feedback notification about child's cycle and kit is generated by the Instructor.

A percentage is shown for the number of **Characteristics/Outcomes and Survey results** received.

Survey Results

This number must be showing >100% completion for the delivery to be able to be marked as complete.

Please note: We are aware that some of the instructors are experiencing issues with not being able to complete courses due to survey errors which are caused by surveys being recorded multiple times for the same rider and therefore creating duplicate entries. The anonymised nature of the data means that this duplicate entry cannot be identified and data adjusted at a later point. We have now relaxed the rules in order to help instructors progress beyond this point and complete deliveries. However, we are still asking them to record the number of

surveys as accurately as possible to avoid duplicates, as this data is a requirement for our Active Travel England reporting.

To overcome this issue, we have now split survey results into two parts – 'Rider' and 'Results'. Rider – this shows the % of riders who have been surveyed and must be 100% to be able to complete the course. If this is not 100% instructors should review the rider checklist to see which entry is missing and complete accordingly.
Results – this shows the % of surveys completed. Results can be greater than 100% if a survey has accidentally been completed twice for the same rider, and will allow you to complete the course, as long as the Rider survey results are 100%.

To mark a course complete, there must be a full set of outcomes, rider feedback, survey results and rider characteristics for those riders that have attended.

Training Delivery Tabs

The tabs at the bottom of the page provide access to the following:

- Parental Consent Link and QR code
- Courses/consents and outcomes summary
- Riders and consent detail including option to upload rider information during onboarding phase
- Outcomes by rider and course status/allocated instructor
- Rider characteristics for each course
- Post course survey results
- Fleet cycle usage (if you have received fleet cycle funding from The Bikeability Trust)

Parental Consent Link and QR code

| QR Code | Courses/Consents | Riders/Consents | Outcomes | Characteristics | Post Course Survey | Fleet Cycles |

Parental Consent Link and QR Code

URL: https://staging.consent.bikeability.org.uk/nah-clean-pig

(DOWNLOAD QR CODE (SVG FORMAT))   (DOWNLOAD QR CODE (PNG FORMAT))

Use the link or download the QR code to include on the course letter sent home to parents. This letter should be shared with the school to send to parents.

You may create your own letter for parents, or we have created a template which you may edit and use. Download the template letter here.

Courses/Consents
This tab provides a quick summary of the consents that have been received for your courses.
You can also see the 'Confirmed booked' figure here and when and by whom it was confirmed.
If the figure has not been confirmed yet by the School, it will also be indicated here.

Courses in Delivery

CONSENTS RECEIVED FOR DELIVERY	CONSENTS ON WAITING LIST
54	3

Level 1 (Year Group: Mixed)

#Booked confirmed 25 Nov 2024 @ 12:48 by Diini Muse [diini.c.sync@gmail.com]

PROVISIONAL	CONFIRMED BOOKED	RIDERS ALLOCATED	ATTENDED
5	7	16	16

Level 2 (Year Group: Mixed)

#Booked has not been confirmed by the school

PROVISIONAL	CONFIRMED BOOKED	RIDERS ALLOCATED	ATTENDED
0	8	8	8

Riders/Consents

Here you will have a detailed view of the consents received at a rider level. It is possible to download consent information in a csv format. The csv data will also include answers to any additional questions that you have included under consent options for your training provider. The date and time of consents provided is also timestamped and logged in the download file.

You also have the option here to sort the list of riders in the order the consents came in, first one on the top. You can do so by using the 'Sort by Consent data' toggle. This can be helpful when moving riders from the Waiting list, the one on top will be the one with the earliest dated consent.

QR Code	Courses/Consents	Riders/Consents	Outcomes	Characteristics	Post Course Survey	Fleet Cycles

Sort by Consent Date   UPLOAD RIDER/CONSENT DATA FROM CSV   DOWNLOAD RIDER/CONSENT DATA TO CSV

#	Name	Year Group	Date of Birth	Consent Status	Created By	Photography Allowed	Newsletter Opt In	
1	Rider One	Y6	3 February 2017	Consent Given	Parent	Yes	No	⋮
2	Rider Two	Y6	4 February 2017	Consent Given	Parent	Yes	No	⋮
3	Rider Three	Y6	5 February 2017	Consent Given	Parent	Yes	No	⋮
4	Rider Five	Y6	7 February 2017	Consent Given	Parent	Yes	No	⋮
5	Rider Seven	Y3	2 April 2017	Consent Given	Parent	Yes	No	⋮

Waiting list

Date/Time	Name	Year Group	Date of Birth	
2024-08-02 11:11:41	Rider Four	Y6	6 February 2017	⋮

You can upload a list of trainees and parent contacts if you have already collected consents using your existing system prior to digitisation. This will allow instructors to use the Instructor App to record outcomes for these riders. However, please ensure that your instructors are appraised of any SEND, medical issues or school notes as this information will not appear in the app. This facility is only available during the first three months of onboarding. For new schools and organisations, please use the complete digitised consent process.

Select 'Riders/Consents' Tab and the 'Upload Rider/Consent data' from csv function. Click 'Rider upload – basic' to download a copy of the file template. Add your data to this template, rider details first then parent details:

firstName
lastName
primaryParent.firstName
primaryParent.lastName
primaryParent.email

Then choose your saved file and upload. The list or riders will now appear under the 'Riders/Consents' tab. Only upload riders where you have been given consent.

Moving riders/consents between courses

If you need to move all (or some of the riders) from one course to another one, without having to collect all consents again, you have the option to download the riders/consents list via the 'Download Rider/Consent data to csv' button. Delete any riders you are not moving over - if applicable, and upload the csv file to the correct course. Make sure you select the 'Full Consent Upload (from csv download)' button to do so.

Rider / Consent Data Upload

Upload CSV Data File

Where you have previously collected consent data prior to onboarding for digitisation, you may upload rider and parent details using the template provided. This facility is only available during the onboarding process. For any new deliveries, please use the digitised consent process and share the URL/QR code for your event.

Rider Upload - Basic

Step 1: Choose a CSV file

SELECT A FILE

CSV only.
Max 4mb.

Step 2. Choose Upload type

BASIC CONSENT UPLOAD

FULL CONSENT UPLOAD (FROM CSV DOWNLOAD)

Removing/editing consent

You can either edit or remove consent for a rider by clicking on the three dots on the right-hand side of the page.

Updating Rider details

In this section you also have the ability to update Riders' details, if for example a mistake was made on the consent form submitted by the parent and information provided by the school wasn't correct, such as a misspelled name or the wrong school year. Simply click on the 3 dots next to the rider, click 'Edit Rider' and update the information as necessary.

The Bikeability Trust

| | QR Code | Courses/Consents | Riders/Consents | Outcomes | Characteristics | Post Course Survey | Fleet Cycles |

UPLOAD RIDER/CONSENT DATA FROM CSV   DOWNLOAD RIDER/CONSENT DATA TO CSV

Name	Year Group	Date of Birth	Consent Status	Created By	Photography Allowed	Newsletter Opt In	
Child Five	Y6	5 May 2015	Consent Given	School	Yes		⋮
Child Four	Y6	4 April 2014	Consent Given	Parent	Yes		⋮
Child Three	Y6	3 March 2014	Consent Given	Parent	No	No	⋮

Edit Rider
Edit Consent
Move to Waiting List
Remove Consent

Update Rider Details

Unique Pupil Number (UPN)

First Name
Child

Last Name
Five

Date Of Birth
5   May   2015

Year Group
Year 6

Gender
Gender

Ethnicity
Select Ethnicity

UPDATE

If you need to edit the level of consent, in case a parent changes their mind about their child being photographed, click on the three dots, and then select 'Edit Consent'. You will be taken to the following screen where you can untick the 'Photography allowed' box. Remember to press 'Update' in order to save the new consent status.

Please note: If outcomes have already been recorded for a rider or the rider has completed any course within a delivery, the Remove Consent option won't be available.

Update Rider Consent

Name:	Child Five
Date Of Birth:	5 May 2015
Year Group:	Y6

Parent/Guardian Details

Primary Parent/Guardian

First Name

Parent

Last Name

Five

Phone Number

07507631039

Email Address

eliskapeskova@googlemail.com

Consent options

☑ Photography allowed (Consent given)

UPDATE

Once you click on 'Remove Consent', you will see the following pop-up. If you are certain you would like to remove the consent, please press OK.

Are you sure you want to remove rider Student 7 F from this training delivery ?

You won't be able to reverse this action.

CANCEL   OK

Waiting List

On this tab you can also move riders from the Consents List to the Waiting List and vice versa. Click on the three dots and select 'Move to Waiting List'.

You can move a rider from the waiting list to the delivery list in the same way by clicking on the three dots and selecting 'Move to Consent List'.

Outcomes

Click on the tabs at the bottom of the screen to see outcomes for each participant, rider characteristics and survey results. If the dashboard is not showing a complete set of results for the course, then use the outcomes tab to display details of which instructor has worked with which rider and whether they have marked the course as complete. An instructor can only mark the course complete in the Instructor App when they have submitted outcomes, feedback and survey results for all riders in their cohort.

If a parent does not receive their post course feedback via email, or you wish to view the full feedback given, select the three dots next to an outcome. Then display the Bikeability Club URL. You can either send this on to the parent or open the link yourself to see what feedback has been given by your instructor. For parents without access to email, you can print this report.

| QR Code | Courses/Consents | Riders/Consents | Outcomes | Characteristics | Post Course Survey | Fleet Cycles |

DOWNLOAD ALL DELIVERY OUTCOMES

Level 1 Year Group: Y6   CLOSE

Rider Name	Attended	Completed	Instructors	Survey?	Feedback?	ⓘ Activity #1 of 4	ⓘ Activity #2 of 4	ⓘ Activity #3 of 4	ⓘ Activity #4 of 4	
Rider One	Yes	Yes	Eliska Peskova	Yes	Yes	With assistance	With assistance	With assistance	With assistance	⋮

DOWNLOAD OUTCOMES (DELIVERY #74010 LEVEL 1 Y6)

ⓘ

☒

Bikeability Club Outcome URL

The URL for this rider's Outcomes is :
https://bikeclub.wpengine.com/?
hashcode=Qz5Q6ptmClfW9ZDeTmfwmsPpaxkpC7fZqz6xplCv9XhrW45l9HUAnZ1cSz2OLiiZU
rzu2U7cpKgRl64eco2ulTwynZXHTM52oPRwSx89rW8%3D

Marking Rider as absent

On this tab, you also have the option to mark a rider as absent if their outcomes have been recorded by an Instructor by accident, or duplication. You can only do so if the delivery has not been marked as complete yet by the Instructor. Click on the three dots next to the relevant rider and select 'Edit'.

Level 1 (Combined) Year Group: Y6 CLOSE

#	Rider Name	Attended	Completed	Instructors	Withdrawn?	Survey?	Feedback?	ⓘ Activity #1 of 4	ⓘ Activity #2 of 4	ⓘ Activity #3 of 4	ⓘ Activity #4 of 4	
1	Amy Rider	Yes	Yes	System Admin	No	Yes	Yes	Not seen	On my own	On my own	On my own	⋮
2	Bertie Rider	Yes	Yes	System Admin	No	Yes	Yes	Not seen	On my own	On my own	On my own	⋮
3	Charlie Rider	Yes	No	System Admin	No	No	Yes	Not seen		Edit / Show Bikeclub URL		⋮

On the next screen, untick the box below Attendance – 'rider attended course?'. And press 'UPDATE'.

Edit Outcomes

Charlie Rider

Attendance

☑ rider attended course?

Activity Outcomes

Prepare Myself For Journey	Check Cycle Is Ready	Set Off & Stop	Pedal
Not seen	Please select a grade	Please select a grade	Please select a grade

UPDATE

Rider Characteristics

Rider characteristics will have been collected either via the consent form or by the lead instructor adding the information on the Instructor App.

You may manually add or amend this information on the following tab. To do this, please click edit.

Post Course survey

The post-course survey collects information from the students about whether they enjoyed the course and if they feel comfortable cycling on their own. This information is collected by the instructor via the app.

QR Code | Courses/Consents | Riders/Consents | Outcomes | Characteristics | Post Course Survey | Fleet Cycles

Level 1

CLOSE

What was your experience of taking part in this Bikeability training?

ENJOYED

4

Now that you have completed the training, how safe do you feel using a cycle?

MORE SAFE

4

Now that you have completed the training, how confident do you feel using a cycle?

MORE CONFIDENT

4

Fleet Cycles

If you have received funding for fleet cycles from The Bikeability Trust, you will also be asked to report on the number of cycles used on the fleet cycles tab for each delivery. This helps us to report cycle usage back to Active Travel England, and to potentially secure future funding for this initiative. This tab will only be visible is you have received fleet cycles funding from the Bikeability Trust.

| QR Code | Courses/Consents | Riders/Consents | Outcomes | Characteristics | Post Course Survey | Fleet Cycles |
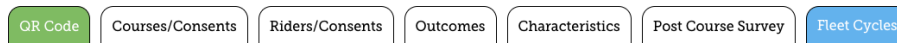
Fleet Cycles Used in Delivery

Please only add a number if your cycles were provided by Bikeability/ATE, or enter 0.

UPDATE

Communications

Digitisation will allow The Bikeability Trust to communicate directly with schools and parents for the first time. These communications have been designed to complement any existing communications from training providers.

Schools

Schools will receive a maximum of four emails between a Bikeability course booking and delivery. All emails will include how many consent forms have been submitted and how many consent forms are outstanding. Two emails will include links to cycle and helmet check videos. These emails are sent under legitimate interest, as these communications relate directly to Bikeability training.

After the course is completed, schools will be offered the opportunity to opt-in to marketing emails from the Trust. Schools who opt-in will be added to The Bikeability Trust mailing list and receive promotional emails, including information about events such as Cycle to School Week, additional resources such as Tools for Schools, and competitions run by the Trust.

```
┌─────────────────┐        ┌─────────────────┐
│ School agrees   │        │ Training provider│
│ training        │───────▶│ sets up         │
│ courses and     │        │ Training Delivery│
│ dates with      │        │ on Link         │
│ training provider│       └─────────────────┘
│ (offline)       │                 │
└─────────────────┘                 ▼
                          ┌─────────────────┐
                          │ Notification sent│
                          │ to School       │
                          │ Contact via Link│
                          │ about new       │
                          │ Training Delivery│
                          └─────────────────┘
                                   │
                                   ▼
                          ┌─────────────────┐
                          │ Login and select│
                          │ relevant        │
                          │ Training Delivery│
                          └─────────────────┘
```

School agrees training courses and dates with training provider (offline)

Training provider sets up Training Delivery on Link

Notification sent to School Contact via Link about new Training Delivery

Login and select relevant Training Delivery

OPTIONAL Upload List of Participants from School Information Management System

Send QR code/URL to parents with course info and consent request form

Monitor Consents received and chase non-responders

Auto-email sent weekly from The Bikeability Trust with number of consents received

OPTIONAL Add relevant Teacher Notes if required

4 WEEKS prior to training event Confirm final booked numbers

Auto-email with cycle and helmet check video emailed

On the day Confirm all consents received and uploaded

Add consents manually to Link, if required

Bikeability training takes place

Offered opt-in to The Bikeability Trust marketing emails

Parents

Parents will receive a series of three emails in the run up to their child's Bikeability course. This will include cycle and helmet check videos, FAQs and a reminder that their course is soon. After the course has been completed, parents will be sent a unique URL to access their child's rider outcomes and instructor feedback, called the Bikeability Club. They will also receive a post-course survey, in order to provide monitoring and evaluation data.

In case there These emails are sent under legitimate interest, as these communications relate directly to their child's Bikeability training.

Then, parents will be offered the opportunity to opt-in to marketing emails. Parents who opt-in will be added to the Bikeability Club mailing list and receive promotional emails, including competitions from commercial partners, additional content such as blog posts and information about events such as Celebration of Bikeability and Cycle to School Week.

The Bikeability Trust

Parent informed by school about Bikeability course
(via email or letter)
including **QR code** to complete consent form

Parent completes online consent form

Parent cannot complete online, paper consent form provided

Parents receive pre-course email with cycle and helmet check videos

School uploads consent information to Link

Parents receive pre-course FAQS email

Parents receive course reminder email

Bikeability course takes place

Child receives certificate and badge

Parent receives email with Bikeability Club URL

Parent cannot receive email, receives paper print out instead

Clicks URL to read rider report and instructor feedback

Parent receives post-course survey email

Parent receives email asking to opt-in to marketing emails

Parent says YES. Receives marketing emails

Parent says NO. No further emails

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Award Materials and Bikeability Club
Award Materials

We have redesigned our award materials to be more fun and engaging, and improved the quality of our badges. You may continue to use existing award materials, as we do not expect you to throw out or destroy current stock. Instructors will not need to complete the outcomes on the certificate, as these will be emailed using outcomes inputted on the Instructor App.

New certificates and stickers are available for purchase on our Shop. For any enquiries, please contact orders@bikeability.org.uk

Booklets are no longer available for purchase. Our website features tips and advice which were available in the booklet, and we have posted a variety of useful videos on our YouTube channel and website. Riders will receive further information by email and on the Bikeability Club.

Bikeability Club

After the course has been completed, parents will be sent a unique URL to access their child's rider outcomes and instructor feedback, called the **Bikeability Club.** This website will include:

- Outcomes required for Bikeability course
- Standard achieved by rider
- YouTube example videos for each outcome
- Individual feedback from Bikeability instructor
- Digital course badge (in addition to physical badge and certificate received after course completion)
- Digital badges for activities, such as "I cycled up a big hill" or "I cycled with my family". These are self-reporting, so families can click to "claim" a badge once they have completed an activity. Badges will be sponsored by commercial partners and include unique offers for families to access.
- Links to additional resources, including how to become a cycling instructor and where to find your nearest cycling club

An example of the website can be seen here.

Reporting

Surveys are integrated throughout the digitisation process, in order to provide monitoring and evaluation data. These include:

- Hands-up rider surveys (including enjoyment of training, feelings of safety and confidence)
- Cycling frequency data: a comparison of pre-training data from the consent form with the post-training data from the post-training parent/carer survey
- Desire for further Bikeability training, and recommendation of Bikeability training

This data will be collated and anonymised to be reported to Active Travel England. At the end of every month, you will be able to access automated downloads from Link. These downloads will be generated once a month to avoid server overload.

The datafile can be accessed from your Training Provider profile page. Select Options/View Digitisation Reports and select the financial year's data that you wish to download. The file will

be downloaded in Microsoft Excel Format with questions and answers embedded in the first two rows of data.

Training Provider Digitisation Reports

Ambridge Cycling Society
ID: 704606A

Training Provider status:	● Active
Renewal status:	● In progress

Related Link account(s):
Josie Walker
Diini Muse
Simon Howarth
Eliska Peskova
David Pember
System Admin

Renewal due date: 1 Jun 2024

Year	File
2024	Digitisation Surveys per Grant – Financial Year 2024
2023	Digitisation Surveys per Grant – Financial Year 2023

Feedback and Support

Please contact the System Admin inbox (system-admin@bikeabilitytrust.org) in the first instance where we will endeavour to answer your question in a speedy way. Several members of the team monitor the inbox and we hope to resolve your queries in a quick and efficient manner and will then contact you to arrange a meeting if we need further detail. If you have a technical query, then please also ensure to include screenshots along with your question.

Issues and feedback can also be reported by an online form. The form is available for grant recipients, training providers, instructors and schools.

https://forms.office.com/e/CzjwAaYXYR

Supplementary documents
Instructor user journey

Before course starts

Instructor allocated to work Bikeability course (via own system)

Before you arrive

Log into Instructor App with Link username and password and set an app PIN → Go to Dashboard and select relevant Training Delivery from the calendar view → View Delivery Details for information regarding event and instructors attending.

When you arrive

View Rider Summary Report for details of SEN, Medical and Teacher Notes

Use All Riders list to check register and mark riders absent or identify riders without consent

Select the Course you are delivering → Register/Select Riders that you will be working with and update

Undertake training

- IF REQUIRED Provide Equipment Feedback for participant → Equipment Feedback emailed to parent
- IF REQUIRED Mark any Withdrawn Riders and feedback why → Parent receives Child Withdrawn notification and feedback
- Select Outcomes and record outcomes for all riders either as you go or at the end of course
- Select Survey and record answers to hands up survey at the end of training
- Select Feedback and record feedback for each rider

Select Check & Complete to view rider progress and complete course → Issue certificate and badge to riders → Parent receives Rider Feedback via automatic email notification and invite to Bikeability Club

Grant recipient user journey

Training provider sets up _Training Delivery_ on Link

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Training provider's instructor _delivers_ Training Delivery to School/ Organisation

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Training provider marks Training Event as _Complete_

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Grant recipient confirms delivery details to be correct via _Delivery Confirmation_ screen

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Grant recipient approves training delivery for _Grant Claim_

School user journey

School agrees training courses and dates with training provider (offline)

→ Training provider sets up Training Delivery on Link

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Notification sent to School Contact via Link about new Training Delivery

↓

Login and select relevant Training Delivery

OPTIONAL Upload List of Participants from School Information Management System

→ Send QR code/URL to parents with course info and consent request form

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Monitor Consents received and chase non-responders

→ Auto-email sent weekly from The Bikeability Trust with number of consents received

OPTIONAL Add relevant Teacher Notes if required

4 WEEKS prior to training event Confirm final booked numbers

Auto-email with cycle and helmet check video emailed

On the day Confirm all consents received and uploaded

Add consents manually to Link, if required

→ Bikeability training takes place

→ Offered opt-in to The Bikeability Trust marketing emails

Parent user journey

Parent informed by school about Bikeability course
(via email or letter)
including **QR code** to complete consent form

Parent completes online consent form

Parent cannot complete online, paper consent form provided

Parents receive pre-course email with cycle and helmet check videos

School uploads consent information to Link

Parents receive pre-course FAQS email

Parents receive course reminder email

Bikeability course takes place

Child receives certificate and badge

Parent receives email with Bikeability Club URL

Parent cannot receive email, receives paper print out instead

Clicks URL to read rider report and instructor feedback

Parent says YES.
Receives marketing emails

Parent receives post-course survey email

Parent receives email asking to opt-in to marketing emails

Parent says NO.
No further emails

Guidance for instructors

Download the instructor onboarding pack, including guidance on how to use the Instructor App, from our website.

Guidance for schools and organisations

Download the schools and organisations onboarding pack, including guidance on how to use Link, from our website.

GDPR
Summary

The Bikeability Trust has worked with data protection specialists Hope & May to ensure that the guidance and resources we are providing you meet data protection legislation requirements.

During the digitisation process, each party acts as a data controller in accordance with the UK GDPR definition Art. 4(7) except where The Bikeability Trust may act as a data processor where other parties may access the electronic systems provided for by the Trust via the instructor app or Link database.

To prepare for digitisation, you must

1. **Complete and upload a controller to processor data sharing agreement template to Link.**

As a data controller, it is **your responsibility** to have a data sharing agreement in place with The Bikeability Trust in their role of **data processor**. This approach reduces the risk for each party and ensures the responsibility for processing activities lies with each respective party.

To support you, we have created a controller to processor data sharing agreement template, which you may **download and use.** You can also use your own agreement if you prefer.

Please upload your completed agreement to Link, using these instructions.

Additional data protection tasks for training providers to consider

1. **Watch our GDPR video**

Data protection specialists Hope & May have created a fifteen minute video to explain the basic principles of GDPR and how it applies to digitisation.

This video includes a summary of data protection laws in the UK, an explanation of data controller and data processors, as well as guidance on consent, retention of data and safeguarding.

Watch the video here: **YouTube video.**

2. **Read our GDPR FAQs**

We have put together a comprehensive list of GDPR related questions and answers which we hope you will find helpful.

We recommend that you take time to read these as they explain data protection and security in more detail. The **Information Commissioner's Office** is a useful resource for any questions about GDPR.

Read the FAQs here: **GDPR FAQs.**

3. **Review your organisation's privacy notice and data protection impact assessment**

It is a legal requirement that any organisation that processes personal data must have a **privacy notice** and complete a **data protection impact assessment** (DPIA). It is your responsibility to review your privacy notice and DPIA, and ensure that they are up to date.

For reference, The Bikeability Trust's privacy notice can be found **on our website.** This has been updated to include usage of the instructor app.

Our DPIA can be shared upon request. Please email **contactus@bikeability.org.uk**.

4. **Create controller to controller data sharing agreements with schools**

It is your responsibility to have controller to controller data sharing agreements with the schools you work in. To support you, we have created a **controller to controller data sharing agreement template**, which you may download and use. You can also use your own agreement if you prefer. This does not need to be uploaded to Link, as this is for your records only.

5. **Discuss mobile phone usage with schools and groups**

It is important that schools and groups understand instructors will need to use mobile phones as part of the digitisation of Bikeability. It is important that you engage positively with schools and groups to ensure your instructors feel supported and empowered to embrace the Instructor App.

To support you, we have created a letter for schools, written and signed by The Bikeability Trust, which outlines how and why mobile phones will be used by Bikeability instructors.

Digitisation Data Sharing Role Diagram

The law specifically defines different parties and the role they play when personal data is gathered and processed for any given purpose. Broadly, there are two roles and a party (any organisation including a sole trader or partnership) must understand which it is before any personal data is processed.

With reference to the Digitisation Data Sharing Role diagram, you will note that The Bikeability Trust acts as both a processor and controller as defined as follows:

A **data controller** is a party that determines why data is processed, what data may be gathered, the purpose for the processing activity, how long it may be retained and who it may be shared with. A controller of data must be registered with the <u>Information Commissioner's Office (ICO)</u>, have a policy and be responsible for all personal data it may use to achieve any given purpose it has identified.

A **data processor** is a party that processes data but only because it has been instructed to do so by another organisation acting as a data controller. It may only process the data in accordance with the instructions it has received. Typically, these instructions will be in an agreement. It does not need a data protection policy to guide it as the instruction provides the guidance. It may also be a data controller but for a different purpose. For example, The Bikeability Trust is a data controller for most of its activities, but for the purposes of providing access to the app, it is a data processor providing services to the training providers and instructors which include secure access to the personal data of children.

We have identified different roles where we make determinations or decisions about the data and where we don't. For example, where we store the data you upload to the Instructor App, we are not making any decisions, merely providing safe storage for you, and ensuring you can access the data you upload when required. In this way, we are a processor acting on your behalf as the data controller. However, where we may use the data to make determinations such as the effectiveness of the scheme, or for analytical or reporting purposes, we are the controller of the data. **A training provider will be a data controller**. For illustrative purposes only, an instructor who is a third party to a provider, is likely to be a data processor to the provider who will be the data controller. However, this can vary so if you are in doubt, you should take legal advice.

Where each party is a data controller they may process the data in accordance with their policy, the parties may also share such data with other controllers where it has established a clear purpose as defined in the diagram.

Each party must establish a lawful basis for processing the data. Such bases may be different depending upon the purpose that has been identified. There must also be a lawful basis to share the data with another party to the agreement.

A controller to processor agreement between the training provider and the Trust, should be in force. Where the Trust acts as a processor the UK GDPR Article 28 processor clauses should be included in the contractual agreement. A controller-to-controller data sharing agreement should also be in force between the training provider and school.
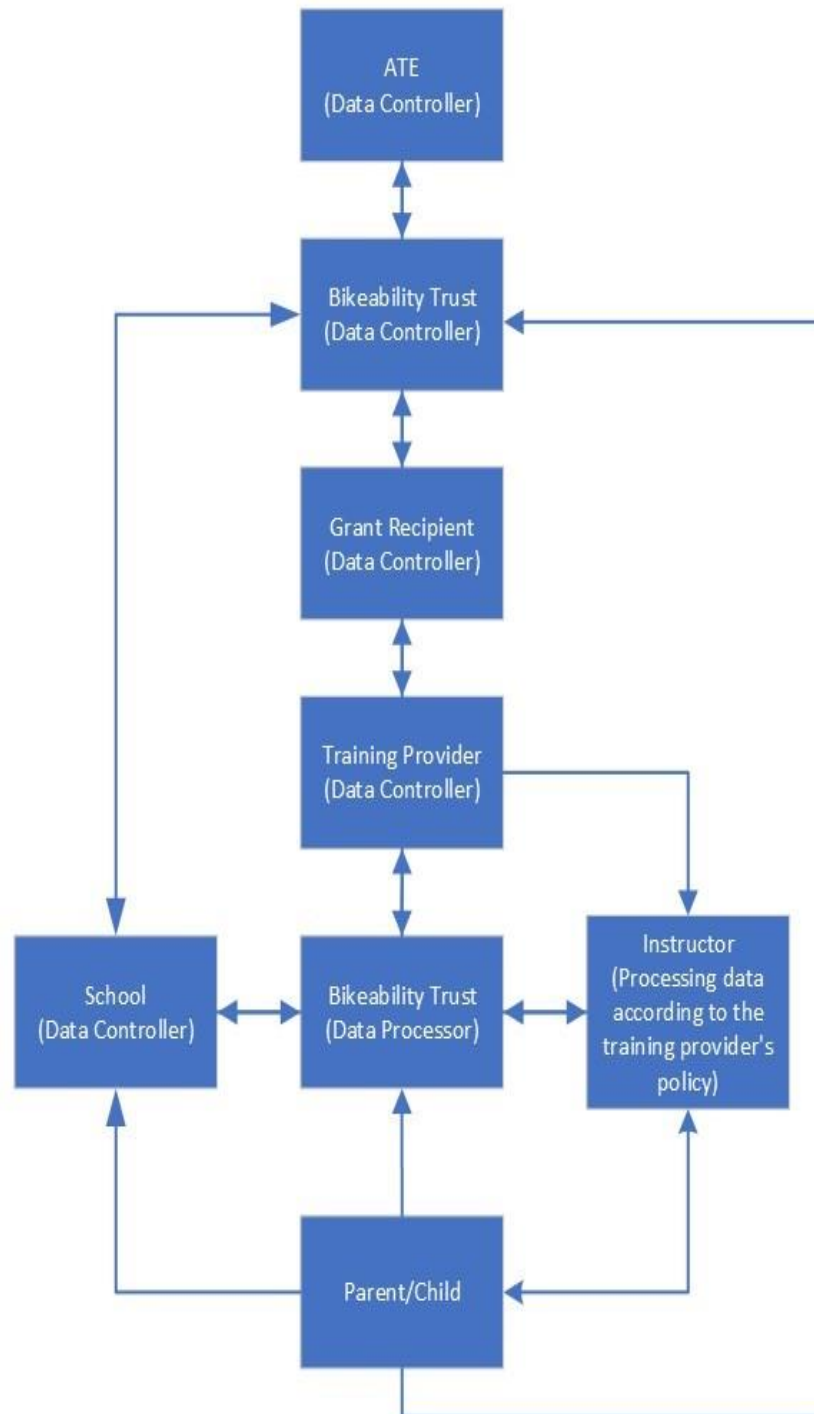
Flow Diagram Roles and Explanations

Data Processors

The Bikeability Trust

For the purposes of providing the Instructor App. The Bikeability Trust's responsibilities include securely storing the data uploaded and ensuring access to the data for all authorised parties. They do not determine what data is uploaded. In this case, they are the data processor who is working on behalf of the controller who use the Instructor App.

Instructors

Instructors are responsible for delivering Bikeability training and follow the instructions of the training provider, for example, the date training will be delivered. This makes the instructor a data processor. The associated training provider is responsible for making sure the instructor has appropriate instructions.

Data Controllers

Active Travel England

Active Travel England processes personal data to determine the outcome of the project. Information may be anonymised, this information is not applicable to the law.

The Bikeability Trust

The Bikeability Trust measures the progress of the project and determines the best way to achieve various objectives connected to the project.

Grant recipients

The grant recipient decides how to deliver the training and who will deliver it.

Training providers

The training provider decides how best to meet its obligations when delivering Bikeability training. Making these decisions make the training provider a data controller.

Schools

For the purpose of ensuring children and their parents/carers can access the course information. They may determine who attends the course and when.

Parents/Carers and Child Riders

The parent/carer and child rider are not subject to data protection law. They are neither a data controller or data processor. Any personal data they handle or share is referred to as "domestic" use. However, they do have UK GDPR information rights that all parties must uphold.

Offline documents/Paper templates

There may still be circumstances where you need to use a paper-based form to record information and enter the data either in to Link or the Instructor App later.

For example, a parent may not be able to access the digital consent form in which case a paper based one can be requested and the school can then add the rider to Link. Or it might not be possible to use your mobile phone in certain cases, so in those instances, you can use paper based forms to record outcomes, feedback and survey results manually and add them to the Instructor App later. Likewise it might be easier to give the school bursar or an office manager a form to complete with rider characteristics which you will add to the app if you are the lead instructor needing that information.

Consent Form: download PDF to print

Rider Characteristics' Form: download PDF to print

Rider Outcomes Excel document, including tabs to record hands up survey answers: download.