Welcome to Train Your Agents – Agency Guide

Access to **Train Your Agents** is provided by the Educator to help bring agent and counsellor training, documents, and key resources together in one central place, making them easier to access and manage.

This guide is designed to support Agency Leads in getting started confidently.

Train Your Agents allows agencies to manage counsellors, access training and documents, use Quick Links, and view basic reporting activity in one simple, centralised system. Each counsellor's training activity is recorded, providing visibility of engagement and progress.

Key Benefits for Agencies

With Train Your Agents, agencies can:

- Add and manage counsellors within their agency
- Easily access training that supports understanding of the Educator's courses, requirements, and student offering
- Revisit training at any time to refresh knowledge
- Access key documents and resources in one place
- Use Quick Links to quickly find important tools and information
- View basic reporting and engagement activity across counsellors
- Upload external/offline certificates to maintain a complete training record for counsellors

Getting Started Checklist

Use this checklist to complete initial setup:

☐ Add counsellors to the agency
☐ Assign counsellors to the Educator
☐ Review available training and documents (where applicable)
☐ Access Quick Links
☐ Upload external/offline certificates (where applicable)
☐ Review basic reporting dashboard
☐ Ensure counsellors are correctly set up and active

Managing Counsellors

Why this matters

Counsellors are the primary users completing training. Agency Leads are typically involved in adding and maintaining counsellor accounts within their agency, helping to ensure details remain up to date and access is correctly assigned.

How to add counsellors

- Go to Team Management via the top-right corner, next to login details
- Select Invite New User
- Add additional agency admins or counsellors
- Select the relevant role
- Enter user details
- Select Add to send the invitation

Bulk upload

Multiple counsellors can be added using the CSV template provided:

- Go to Team Management via the top-right corner, next to login details
- Select Invite New User
- Choose the Bulk Upload (CSV) option
- Download the CSV template *(do not change file format or column headings)*

- Add counsellor details to the template
- Save the document
- Return to the platform and select Upload

Counsellor Assignment

Counsellors must be assigned to an Educator to access training, documents, and other platform resources.

- Go to Team Management
- Select Counsellors
- Select the relevant counsellors
- Click Assign Counsellors
- Select the relevant Educator
- Click Assign to confirm

Training Access

Counsellors automatically gain access to published training once they have been assigned to an Educator by the Agency Lead. This ensures access to training and resources made available by the Educator.

Viewing Training

To access training, go to **My Training**. From here, the following sections are available:

- Available Training – all training accessible to counsellors
- Assigned Training – training that may be allocated by the Educator (optional feature)
- Completed Training – all completed training, available for ongoing reference
- ICEF Academy Courses – external courses delivered via ICEF Academy

Starting Training

To begin a training module, the relevant training card is selected to open the content.

Progress is automatically saved, allowing training to be completed in stages without losing progress.

ICEF Academy Courses

ICEF Academy courses are external learning modules accessed through the platform. When a course is completed and the associated exam is passed (some exams are free, while others may have a cost), the certificate is automatically added to the Certification section.

Educators also have visibility of ICEF Academy course completions, ensuring a complete training record is maintained.

Documents

Documents are added and shared by the Educator and may include application forms, marketing materials, and guidance documents supporting day-to-day activity.

Finding Documents

- Go to Documents
- All documents added by the Educator are visible
- Folders may be used to organise content
- Search and filter tools can be used to locate specific files
- Documents can be downloaded using the download icon

Quick Links

Quick Links are added and shared by the Educator to provide fast access to important tools, websites, and resources.

They may include application portals, guidance pages, and other internal or external resources.

Finding Quick Links

- Go to Quick Links
- All shared links are visible
- Categories may be used to improve organisation and visibility
- Links can be opened directly

My Certificates

When training is completed that has been added to Train Your Agents by an Educator, a certificate is issued automatically and becomes available in **My Certificates** for download.

Certificate Status

If a certificate is shown as **Update Required**, this indicates the course has been updated and the training must be retaken to maintain certification validity.

Offline Certifications

Training completed outside the platform can also be recorded:

- Select Offline Certifications
- Enter training details
- Upload a copy of the certificate
- Save the record

This ensures a complete view of additional training completed outside the platform.

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Reporting & Analytics

The reporting and analytics area provides Agency Leads with an overview of counsellor engagement across the platform.

This includes visibility of training activity, such as courses in progress and completed training, helping to understand overall participation and progress within the agency.

From here, Agency Leads can review how counsellors are engaging with available training and identify overall completion trends across the agency.

Next Steps & Support

Once the agency setup is complete, counsellors can be added and assigned to an Educator so they can begin accessing training and resources.

Support

Additional support is available at any time through the platform:

- **Help section** – access guidance and answers to common questions
- **Contact Us** – reach the support team for further assistance
- **Customer Success Manager** – available for onboarding support, guidance on using the platform, and best practice advice

Thank you for getting set up on Train Your Agents. The platform is designed to make training access and information sharing as simple and efficient as possible.