

Health & Safety E-learning Platform

Managing Leavers (Account Status)



Introduction

When an employee leaves the business you do not have to delete their training and/or self-assessment data, you can simply change their account status to *inactive*.

An account can be in one of two states: **Active** or **Inactive**.

Active users:

- Can login and undertake training
- Can receive emails from the platform
- Will use a license for each course they are added to

Inactive users:

- Cannot login or undertake training
- Do not receive emails from the platform
- Licenses are returned to the pool for use by other employees
- Do not appear on reports unless specified
- Training and self-assessment records are preserved

Example:

Joanna has recently retired from her role at Megacorp. Emma, the Company Administrator at Megacorp sets Joanna's user account status to *Inactive*. Joanna's licenses are freed up for another member of staff and the platform keeps Joanna's training records for compliance.

How to change the status of an account

You can toggle the status of an account via the user list. The user list can be accessed via the Administration block by clicking on **Users > Accounts > Browse list**

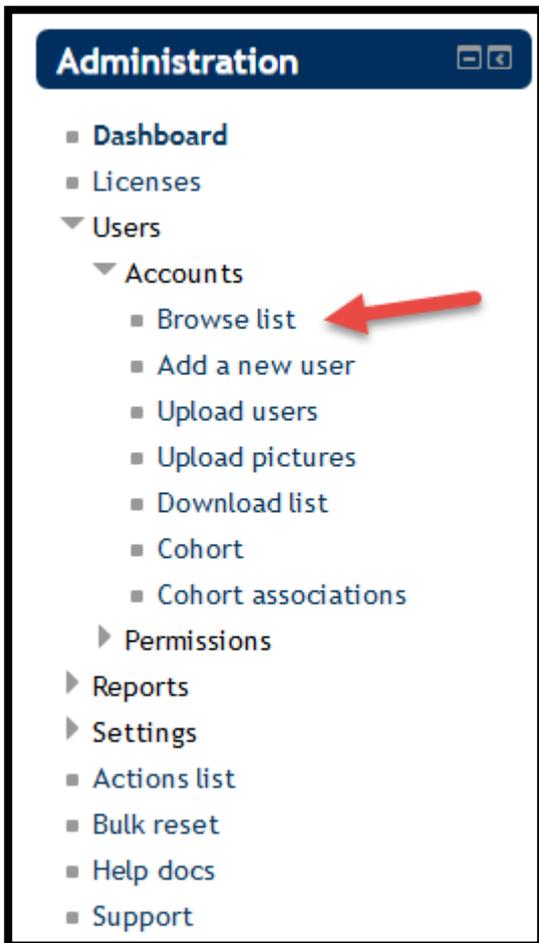


Figure 1 - The administration block with 'Browse list' selected

You will then be presented with a list of user accounts on your platform. An account status can be found in the column furthest to the right. Simply click on the 'Inactive' or 'Active' link for an account to change its status.

Home ► Browse list

New filter *Show advanced

User full name

Add a new user

First name ↓ / Surname	Email address	City/town	Last access	Edit	Status ?
Edgar Allen Poe	kerry.britsafe-4ftrain-emp1@gmail.com	London	7 days 6 hours	Edit	Active
George Orwell	kerry.britsafe-4ftrain-emp2@gmail.com	London	61 days 4 hours	Edit	Inactive
Jane Austen	kerry.britsafe-4ftrain-emp3@gmail.com	Edinburgh	15 days 1 hour	Edit	Active
Leo Tolstoy	kerry.britsafe-4ftrain-mng2@gmail.com	Edinburgh	40 days 23 hours	Edit	Active
Mary Shelley	kerry.britsafe-4ftrain-emp4@gmail.com	Edinburgh	33 days 6 hours	Edit	Active
Oscar Wilde	kerry.britsafe-4ftrain-admin1@gmail.com	Dublin	17 secs	Edit	Active
Sylvia Plath	kerry.britsafe-4ftrain-mng1@gmail.com	London	7 days 5 hours	Edit	Inactive

Figure 2 - A user list with the 'Status' column highlighted

Tips

- You can use the filters to search for an individual user or subset of users
- A user whose status is changed to *inactive* will not lose any course progression when they are restored to *active*
- You are unable to make your own account inactive
- You can change the status of many accounts simultaneously by using a file upload (more information in the guide available here: <https://support.britsafe.org/hc/en-gb/articles/360006540833>)