

This form explains what E2E Providers need to do when a Passport has been referred to them by Connexions or another E2E Provider.

STEP 1 : Open E2E Passport Manager

- open a web browser such as Internet Explorer
- go to <http://manager.e2epassport.com>
- enter your Manager login and password
- click the **Login** button



Allocating an Adviser?

When a learner is referred via the Referral form, they go to an organisation's **Incoming Referrals** folder. This is like an in-box or in-tray. A local Manager needs to use the **E2E Passport Manager** program to transfer a Passport from Incoming Referrals to the adviser or key worker who will become the Primary Adviser.

STEP 2 : Select Incoming Referrals

- from your Adviser list on the left ...
- select the **Incoming Referrals** folder
- all referrals via the Referral Form are stored here pending allocation to a key worker

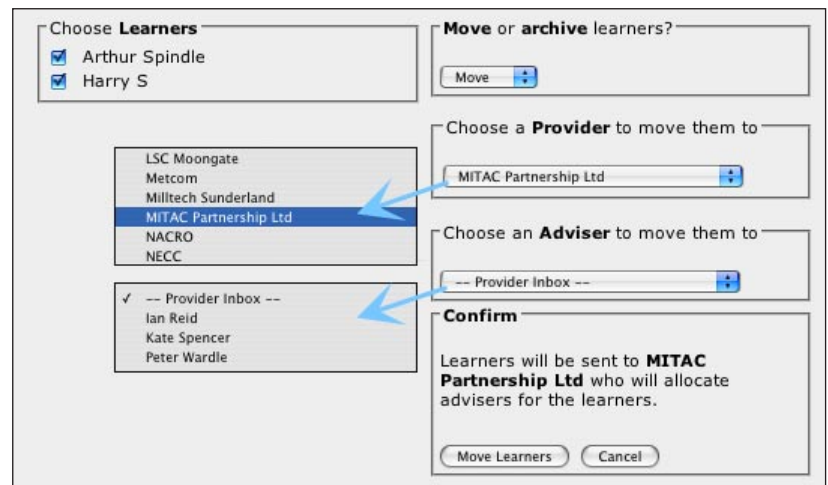


Incoming Referrals Caseload

You will see a list of all learners who have been referred to your organisation in the menu on the left. The same list in the Caseload tab to the right allows you to select any number of these learners to move them to an Adviser / Keyworker in your own or another organisation.

STEP 3 : Mark Off and Move

- under **Choose Learners** click to select those learners you want to allocate (move) to an Adviser or Key Worker
- under **Move or archive learners**, select **Move** from the drop-down list
- under **Choose a Provider to move them to** select your own organisation from the list
- under **Choose an Adviser to move them to** select any Passport Adviser registered to your organisation from the list
- check details in the **Confirm** section and select **Move Learners** or **Cancel**



STEP 4 : Check

- use the **double chevron button** (top left) to move up a level
- select the Adviser to whom you have just allocated learner(s)
- check that the moved learners are in their caseload.



What happens to the E2E Passport?

The learner's Passport will be moved to the Adviser / Keyworker you selected. It will no longer be visible in **Incoming Referrals**.

The nominated key worker / adviser will be able to see the E2E Passport **plus** all referral information from their own Adviser login.