

# Starting a Passport

**E**ither Connexions or E2E Providers can start a new E2E Passport by following these simple steps.

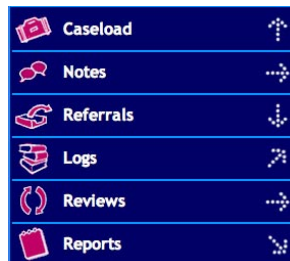
## STEP 1 : Open Passport

- open a web browser such as Internet Explorer
- go to [www.e2epassport.com](http://www.e2epassport.com)
- enter your Adviser **login** and **password**
- click the **Login** button

**Adviser Login & Password** : *xx.advisername* : you will have been given this name when you were first trained in how to use E2E Passport. The *xx.* part is an area code and must not be omitted. Examples of area code include *nu.* (Northumberland), *nt.* (Notts), *tw.* (Tyne & Wear) and *cd.* (Durham)

## STEP 2 : Use Caseload Option

- select **Caseload** from the menu
  - find and click the **New** button under your **Primary Caseload** list
- A form headed **Add New Learner** will appear.



**Caseload** : the *Caseload* option lets Passport Advisers see and edit lists of the learners they are currently managing (Primary Caseload), as well as those they have passed to another organisation but still wish to track (Secondary Caseload). Here Caseload is used to set up a new learner Passport.

## STEP 3 : Complete Add New Learner Form

Add New Learner	
Username	tw. <input type="text" value="enter LEARNER username"/>
Password	<input type="text" value="enter password"/>
Real Name	<input type="text" value="enter learner's Real Name"/>
Client Reference	<input type="text" value="enter CLIENTREF"/> <small>This value is used by external systems that exchange data with E2E Passport. It is safe to leave blank this blank if you do not know it, but no data will be included from other systems until a reference has been provided. Contact the helpline if you are unsure.</small>
Secondary Adviser	None selected
Log sessions?	<input checked="" type="radio"/> Yes <input type="radio"/> No

**Username** : *xx.learnername* : this is the name the learner will use to log in to Passport - the *xx.* part (area code) is added for you and will be part of all usernames

**Password** : *password123* : each learner needs a password to accompany their username - we recommend at least 6 characters and a combination of letters and numbers

**Real Name** : *Forename Surname* : simply the actual name of the learner as distinct from their Username - this is not used to log in

**Client Ref** : *REID1001*: the number supplied to you by another database and used to automatically transfer data to Passport

**Secondary Adviser** : *xx.advisername* : you will become the Secondary Adviser when you refer the learner to an E2E Provider. You can leave this blank for the time being

**Log Sessions** : *yes / no* : if you are setting up a **practice learner** to try out Passport, please choose **No** otherwise choose **Yes**

## STEP 4 : Save

- make a note of the learner login details you have just entered
- click the blue **Save** button to create the new Passport

The new Passport will appear in your **Primary Caseload** list.

**Save**

**Cancel**

**Save / Cancel** : when you have completed the form, please choose **Save** to set up the Passport. Choosing **Cancel** will stop the set-up process and not create a new Passport.