SELF-SERVICE GUIDANCE FOR RETURNING PARTNERS

A note for existing partners of Tute Education

Welcome back to Tute for school year 2024-2025! As you know, we're rolling out a suite of self-service features to our users to make managing your Tute users, students, and programmes easier and more accessible. Below you will find step-by-step guidelines for the first batch of self-service functionality.

As you are already on our platform, you do not need to register for self-service as this will be done for your organisation already. Whoever was the current main contact has been assigned the super system administrator role, and other users have been transferred across as system administrators (more information below). Similarly, the user profile we previously termed as link teachers are now registered as link contacts.

Lastly, you do not need to re-add your students that have previously been enrolled with Tute Education. You will, of course, need to let us know which curriculums you want them to be enrolled on this year, if you haven't already.

Happy learning!

1 Registering your first user for self-service

1. If your organisation is just starting out with Tute Education, you will receive an invitation email from noreply@tute.com to register your account to enable self-service. As the first user from your organisation, you will be the super system administrator (super sys admin). This is the highest user permission set, which enables you to manage user accounts for the rest of your organisation (including parent accounts), as well as manage student users and programmes. There is more information on the different user types below and the super sys admin user type can be applied to up to three people within a single organisation.
2. Follow the link in the email to register your account for self-service. Submit.
3. You'll then receive a further email to verify your account. Once you've done this, a member of our team will validate on our end – then you are good to go!

2 Registering additional users for self-service

Apart from students, you can also create different user profiles with different permissions. Below is a table summarising a few key differences between the user profiles:

User profiles	What they can see	What they can do
Super system administrator	• All students, including timetables, attendance, engagement, and progress • All users • All programmes	• Add, edit, or withdraw all students • Add, edit, or disable all users • View all learning programmes
System administrator	• Selected students (as above) • Selected system admin, link contact, and parent users • Selected programmes	• Manage selected students (as above) • Manage link contact and parent users (as above) • View selected learning programmes
Link contact	• Selected students (as above) • Selected users	• Can edit selected students, including resetting passwords • Can access the contact form
Parent	• Selected students	• Can access the contact form

To create a user:

1. Click Users on the left-hand menu and then New user in the upper right corner.
2. Complete each of the six stages of the User Creation wizard. Once each stage is completed, click on Next Step to progress through the stages.
3. In the fourth stage (Partner Profile) you will need to select the user type for the user being created from the drop-down menu. The user types allow different access to enrolled students, see above.

3 Adding students

3.1 Adding individual students

1. Log into your account and from the left-hand side menu, select Students.
2. In the top right corner select New Student.
3. Complete each of the six stages of the User Creation wizard. Once each stage is completed, click on Next Step to progress through the stages. Required fields are denoted by an asterisk (*).
4. Once all stages have been created, click on Create in the right corner to complete the process.

Further guidance

- Login name: this is the username you choose for your student to log into the platform. We recommend first name.first initial of last name@four letter school UID. For example, fred.s@test.
- Display name: we recommend first name (or preferred name as this is what other students and teachers will see) and last name initial.
- While some fields are optional, the more information you share, the better we can support our current and future students.

3.2 Adding students in bulk

1. Log into your account and from the left-hand side menu, select Students.
2. In the top right corner select Import from CSV.
3. Then in the bottom left corner, click Download Template. This will automatically download onto your device.
4. Navigate to where downloads are saved on your device. Find and open the student CSV, which will be named template.
5. Populate the spreadsheet with student details. One row per student. Further details on completing this can be found below.
6. Save as a .csv file and return to the Tute platform.
7. Click into the big grey box to select a file to upload, or you can use the black Select File button at the bottom of the page. Choose the CSV you saved and then click Import and Save.

Further guidance

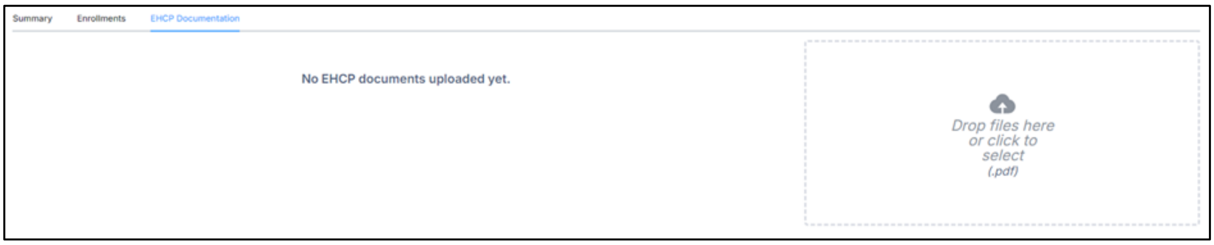
- In the template, you'll see input types in row 2 indicating how the data should be formatted.
  - Text is free text. Text for Gender should be Male, Female, or Unspecified.
  - Boolean should be filled in as True or False.
- If there is an issue with your uploaded file, the problematic fields will be highlighted in pink on the platform. You'll need to resolve these in your CSV, re-save, and upload again.

3.3 Uploading EHCPs

It is easier than ever to securely share EHCPs. Follow these steps to upload an EHCP to a student's Tute account.

1. First locate the student by navigating to Users then Students. The EHCP filter at the top of the page can be used to help with this.
2. Next click the user details button, which is the 'i' icon to the right of the student's name. This will bring up the Student – Summary screen.

3. Scroll down to find the EHCP Documentation tab (pictured below).



4. From here it is possible to upload a EHCP document by either dropping a file in the drop box or selecting one. This must be in a .pdf format.
5. After uploading the document, it can be downloaded from the student profile on the Student - Summary page.
6. Details such as the file name, upload date and the user who submitted the file can be found under the EHCP Documentation tab. From here the file can also be deleted or replaced.

3.4 Private bookings

Once your students have been uploaded onto the Tute platform, you can request a private booking for them by completing this form: click here.

This will be processed by our operations team. Please ensure your requested start date is a minimum of 10 full working days in the future. We always endeavour to meet this minimum, but please note that during busy periods this lead time can be considerably longer.

The operations team will be back in touch to confirm a start date and clarify anything to do with your private provision.

In the near term, we expect to improve our platform functionality further, enabling partners to put this request through entirely through the platform without needing to submit the above form.

3.5 Shared programme bookings

Please use this link to enrol a student onto Tute's Virtual School (VS): click here.

Please use this link to enrol a student onto Tute's Shared Courses: click here.

As above in 3.4, you can register your students onto the platform in advance of completing these forms which will make the enrolment process faster. This is not currently a requirement.

Once the form has been submitted, our SLA is to have the student enrolled in 48 hours (during working days).

3.6 Withdrawing students from individual programmes

You can now withdraw a student from individual enrolments within the platform. To do this:

1. Log into your account and from the left-hand side menu, select Students.
2. From the list of students shown, find the student you want to withdraw and then click on the blue 'i' icon to the right of their name.
3. Scroll down and click on Enrolments.
4. Choose the one you want to withdraw from and set the date you want this to come into effect (the next day is the soonest available option).
5. A confirmation box will then pop up for you to confirm the withdrawal.
6. To finalise the withdrawal, a pop up will appear asking for the reason. Complete this and then you can submit.

3.7 Withdrawing students from all programmes

1. Log into your account and from the left-hand side menu, select Students.
2. From the list of students shown, find the student you want to withdraw and then click on the blue 'I' icon to the right of their name.
3. Scroll down and click on Enrolments.
4. To withdraw from all programmes, click on the Withdraw from all programmes button at the bottom of the page.
5. A confirmation box will then pop up for you to confirm the withdrawal.
6. To finalise the withdrawal, a pop up will appear asking for the reason and the date you want the withdrawal to be actioned from. Complete these details and then click the Add Reason button.

3.8 Deactivating and reactivating students

There may be times when you may want to 'pause' the provision for a student. This can be done through deactivating the student. It should be noted that you would need to reactivate a student if you want the student to resume provision at a future date.

1. Log into your account and from the left-hand side menu, select Students
2. From the list of students shown, find the student you want to deactivate and then click on the red icon to the right of their name
3. Clicking on the icon will open a pop up that will give you the option to deactivate the account immediately or on a date that you specify. Clicking on the relevant button will action the request
4. Once deactivated, the red icon will turn into a green icon

5. To reactivate the student, click on the green icon. A pop up will appear asking you to confirm the reactivation

A few other things:

- Weekly summary reports: You have the option to enable these to send as you add users. This means that the user will receive a PDF report to their email inbox every Monday with a summary report for each student from the previous week. This report will include attendance, engagement, and progress details.
- When withdrawing from a programme, use the first date that you want there to be no more lessons.
- Videos to demonstrate many of these new features are available on the Partner Hub: [New Platform features - Tute]