Generate and Issue a Certificate or Case Report

kinseed

Learn how to Generate and Issue a certificate (Pre-Placement, Health Surveillance, Immunisations), or a Report (Case Referral)
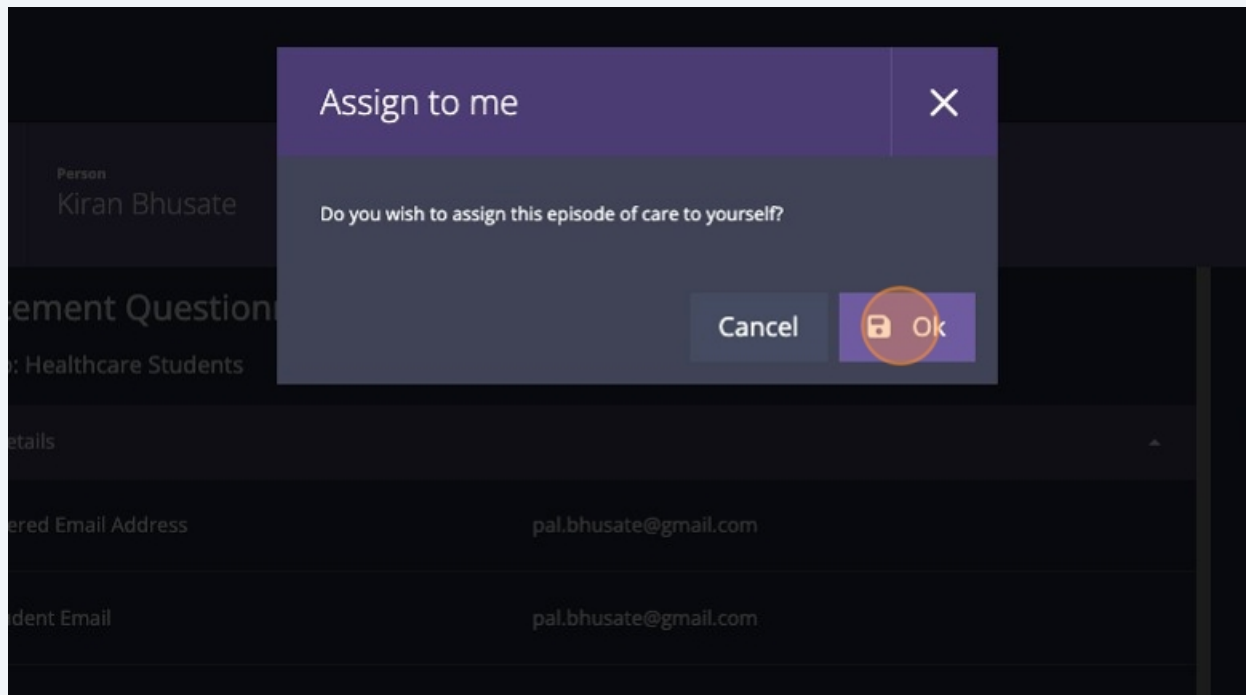
1 Open an Episode for a person where you're ready to issue a certificate (Pre-Placement, Health Surveillance, Immunisations) or a Report (Case Referral)

2 If the episode is not currently assigned to you, click **Assign to me** to assign it to yourself

3   Click "Ok"

ℹ️ Assigning an episode to yourself marks you as the last person to take action on the episode, and allows you to make changes / progress the episode with the Next Steps button

Generating the Certificate

4   Click "Generate Certificate"

5   Choose the type of certificate or report to issue, and fill in the details as required

6 When you've finished adding the required details for the certificate or report, click the **Preview** button

7 Check the contents of the certificate, and when ready, click **Generate**

> **(i)** Note Certificates do not require physical signatures - they are digitally signed by whoever clicks "Generate" for the certificate.

8 Click "Close"
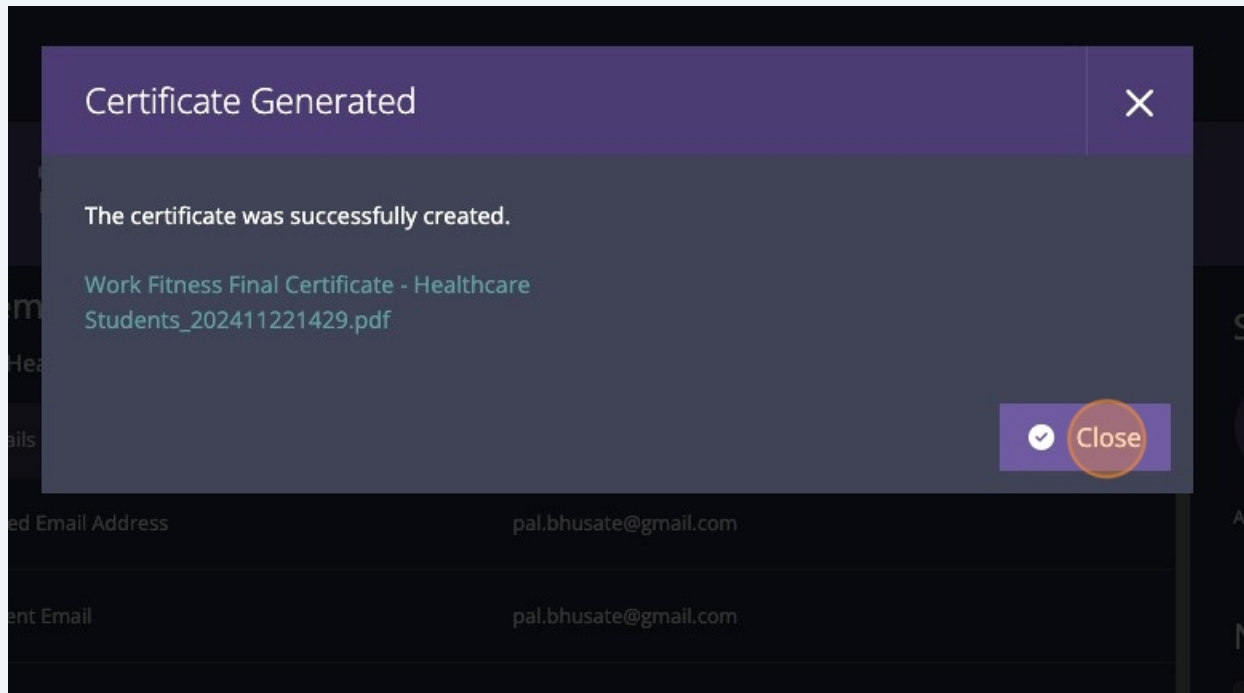
Issuing the Certificate

9 If you need to check for consent with the person before sending the certificate or report, click the **Request Consent** button
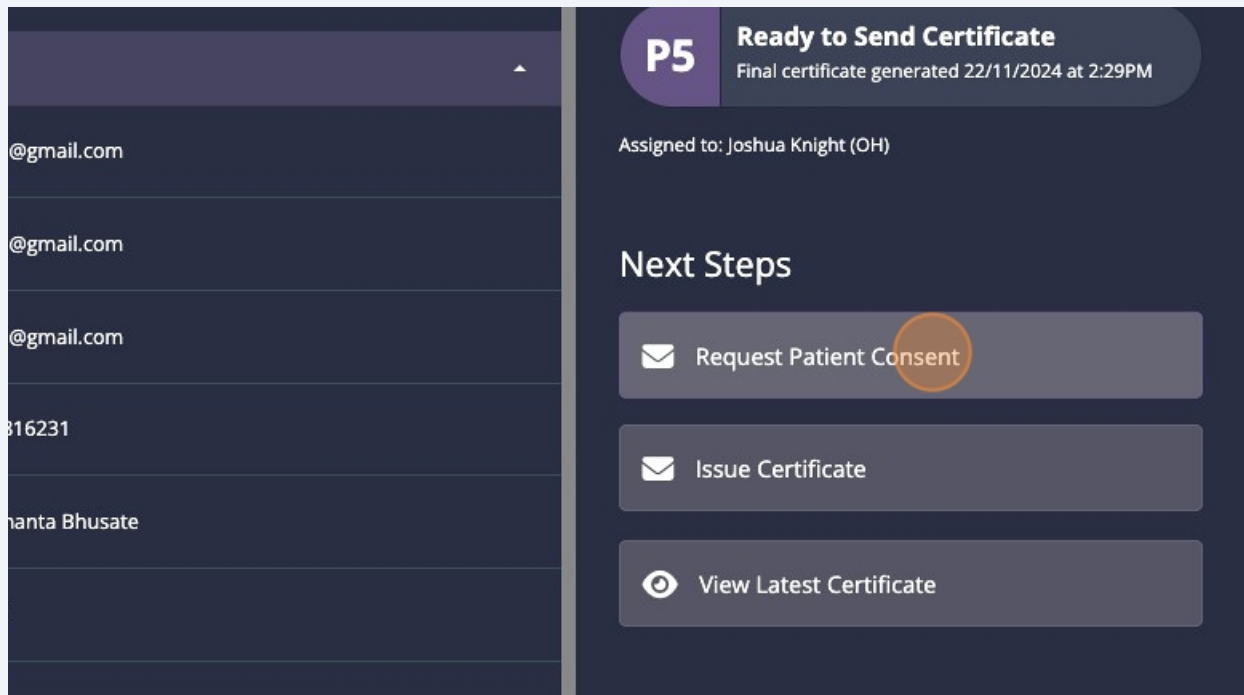
10 Click **Send** to request consent from the person.
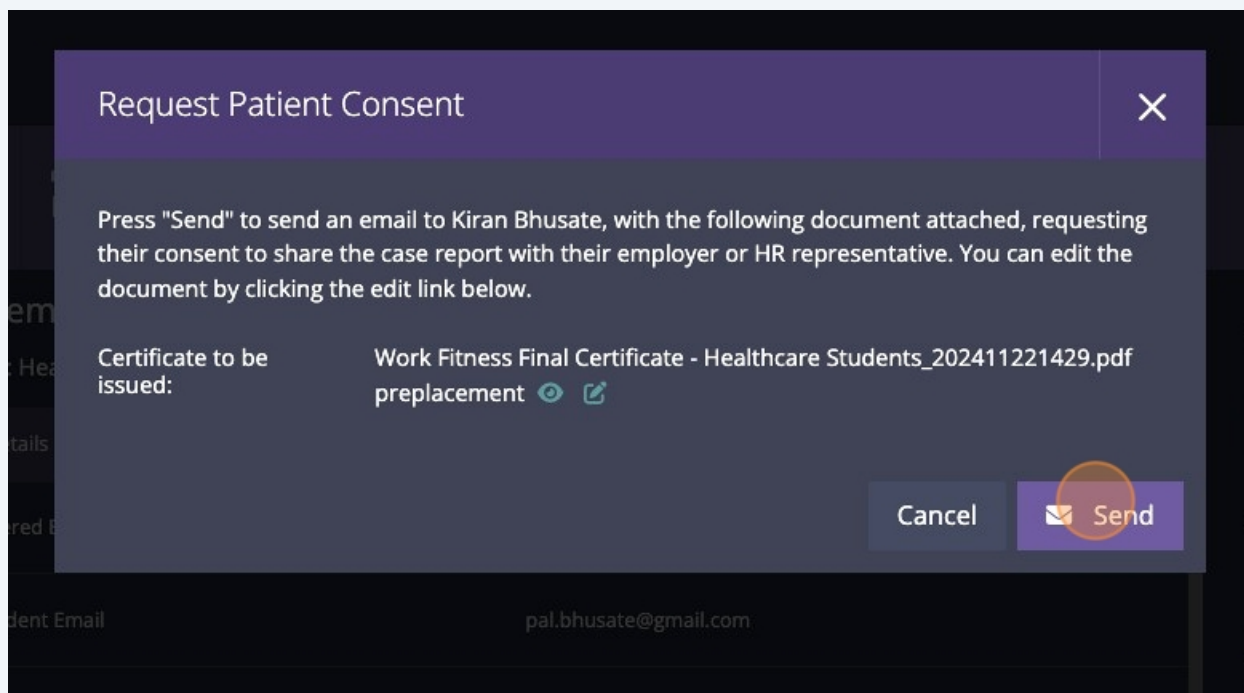
11 If you have requested consent, the episode will update status to tell you when the person has provided consent (or denied consent)

12 To issue the certificate, click **Issue Certificate**
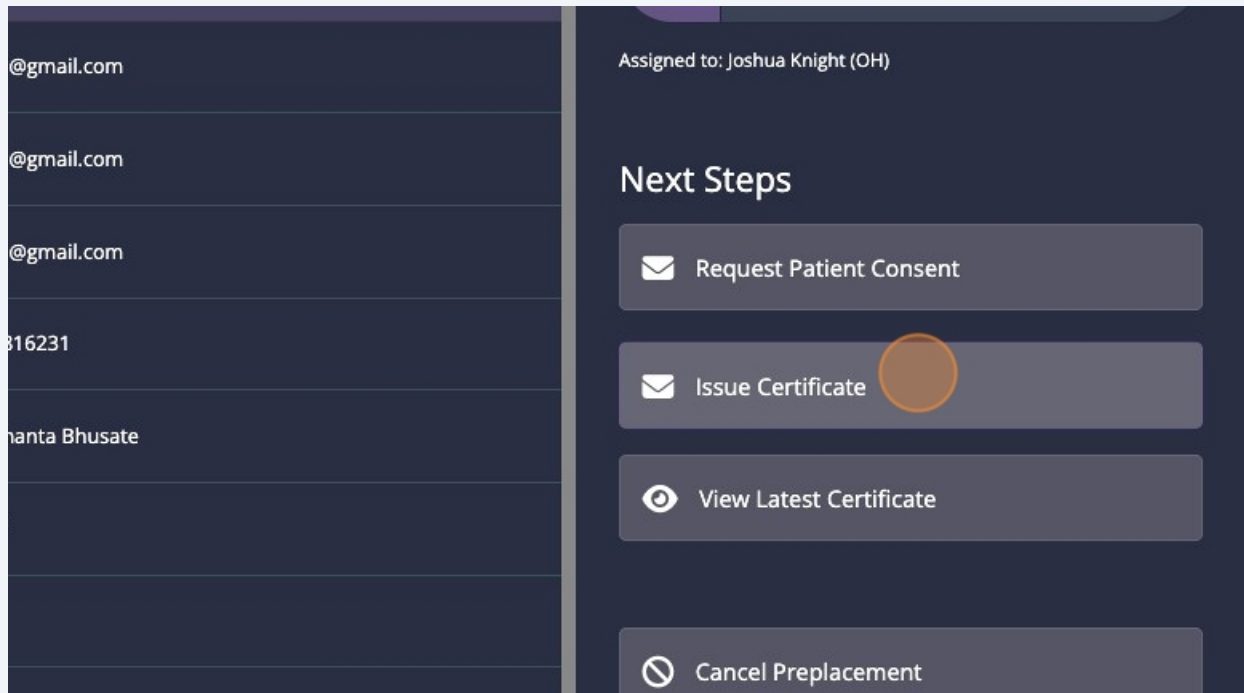
13 Choose who you would like to send the certificate to from the options on the dialog box

> ⚠️ Make sure the correct people are selected. If you do not want the document to be sent to the individual in question, make sure the **Send Copy to Person?** tickbox is not checked.
>
> If an address is wrong, close this dialog box and correct the address in the person's record first.

14 Click "Issue Certificate"

Distribution: To:

hr@testorg.com,pal.bhusate@kinseed.com,

CC:

healthandsafety@testorg.com,

Additional Cc recipients? (comma-separated)

✓ Send copy to person?

Close   ✈ Issue Certificate

Street Address: 11 Draytons View Street Address Line 2: Green City.
Tes Region: Test Post Code: Test Country: United Kingdom

15 The certificate is sent to the selected people, and will now appear in the Documents tab for the person's record

Closing the Episode

16 When the certificate is issued, you can make changes and re-issue it as many times as needed by clicking "Edit and Reissue" or "Edit and Request Consent". Closing the episode marks the episode as final, and stops further changes from being made to the certificate.

17 Click "Close Preplacement"

18 Give a description for the closure of the episode (e.g. "Person's employment has now commenced"), and click **Send**
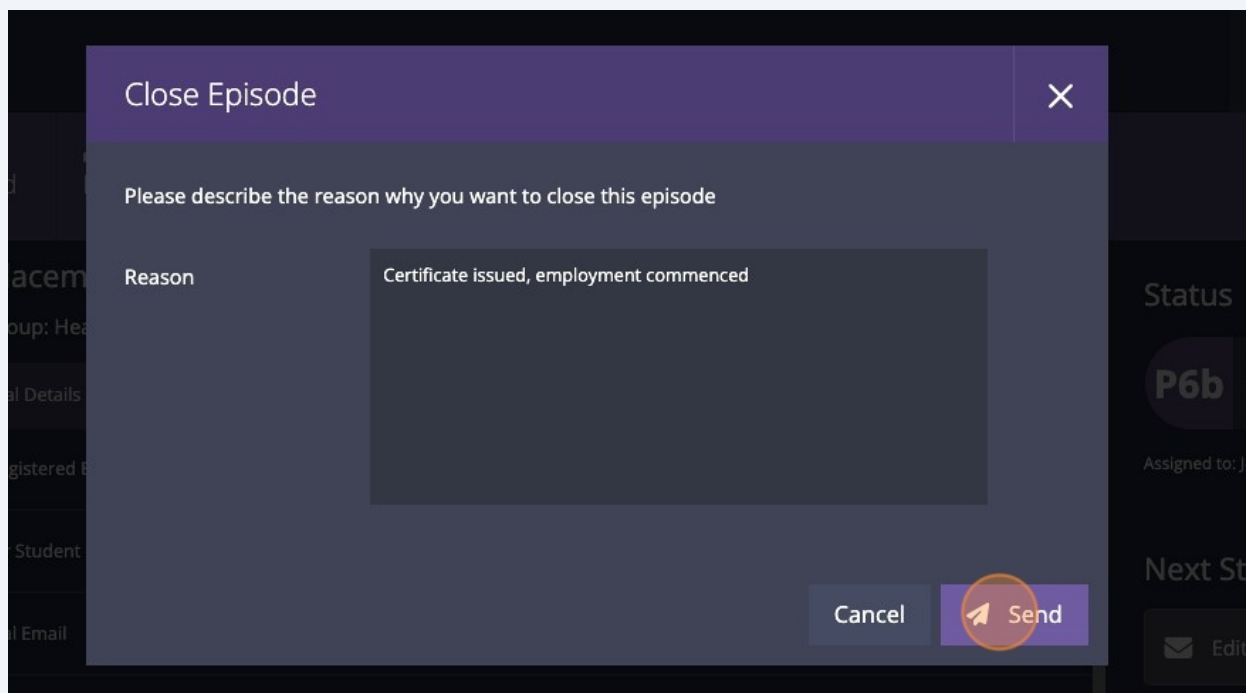
19 The episode is now closed, and you can still find the certificate in the Documents library for the person.

Person	
Organisation	
Episodes	
Journal	
Documents	
Communications	
Absence Reviews	
Notes	

Preplacement Questionnaire Responses
Role Group: Healthcare Students

Personal Details ▲

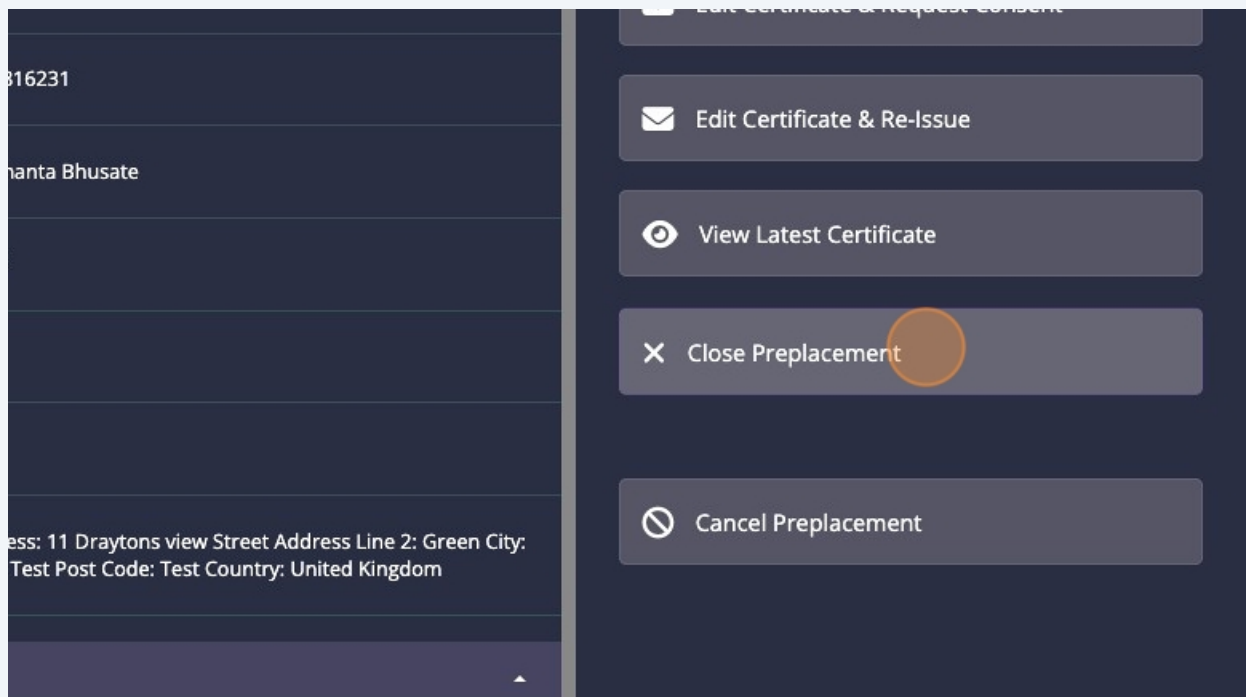|	
Your Registered Email Address	pal.bhusate@gmail.com
Work or Student Email	pal.bhusate@gmail.com
Personal Email	pal.bhusate@gmail.com
Mobile Phone Number	+44 (7) 810816231
Name	Ms. Kiran Shanta Bhusate
Date of Birth	01/01/1993
Gender at Brith	Female
Gender Identified with	Woman
Home Address	Street Address: 11 Draytons view Street Address Line 2: Green City: Tes Region: Test Post Code: Test Country: United Kingdom

Study Programme Details ▲

Status

X **Preplacement Closed**
Closed 22/11/2024 at 2:30PM

Assigned to: Joshua Knight (OH)