

SAF USER GUIDE

HOW TO GUIDES

Select the quick link from the below list

How to register your organisation

How to assign a Master Administrator

How to set up new branches/sites

How to set up and archive users

How to assign the SAF Expert test

How to check total test passes for your organisation

How to check the user progress and test status of your users

How to Apply for SAF Approved Status

Where to find your company SAF Approved Certificate

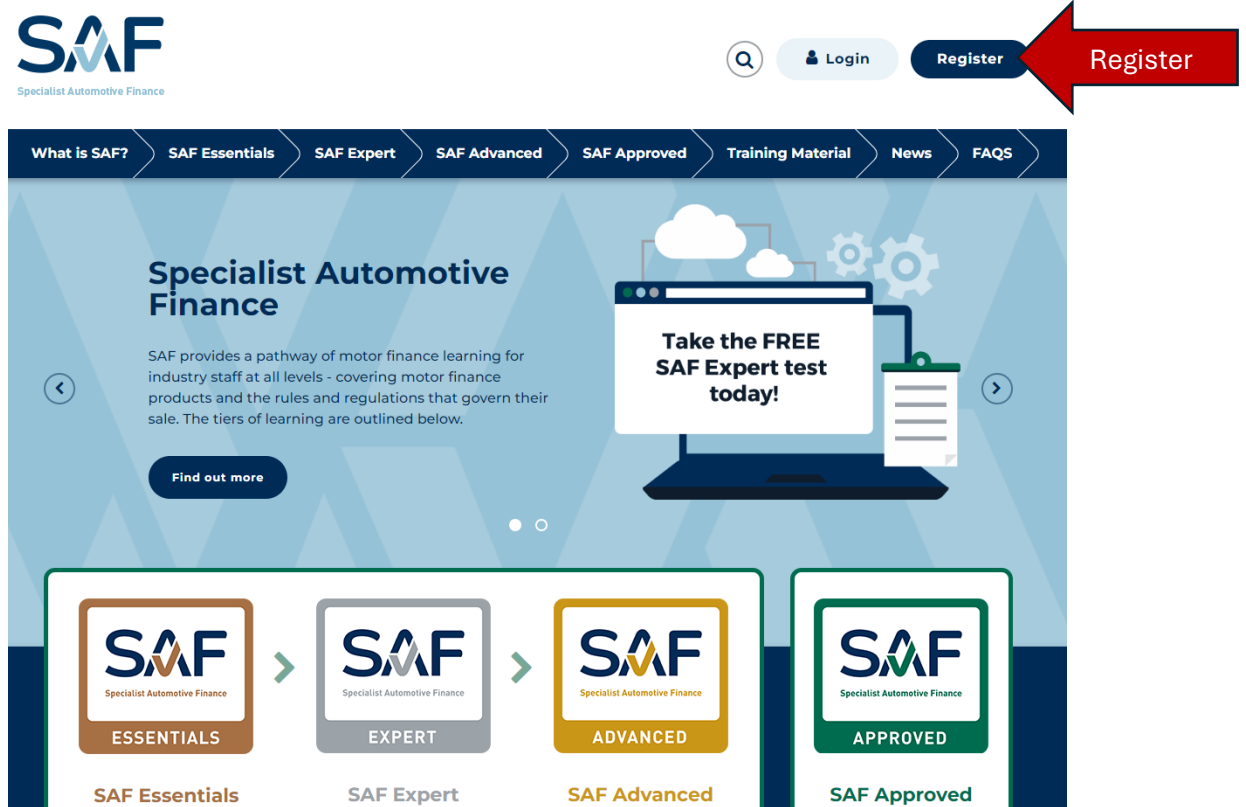
How to unlock a failed SAF Expert test

How to change a user's branch

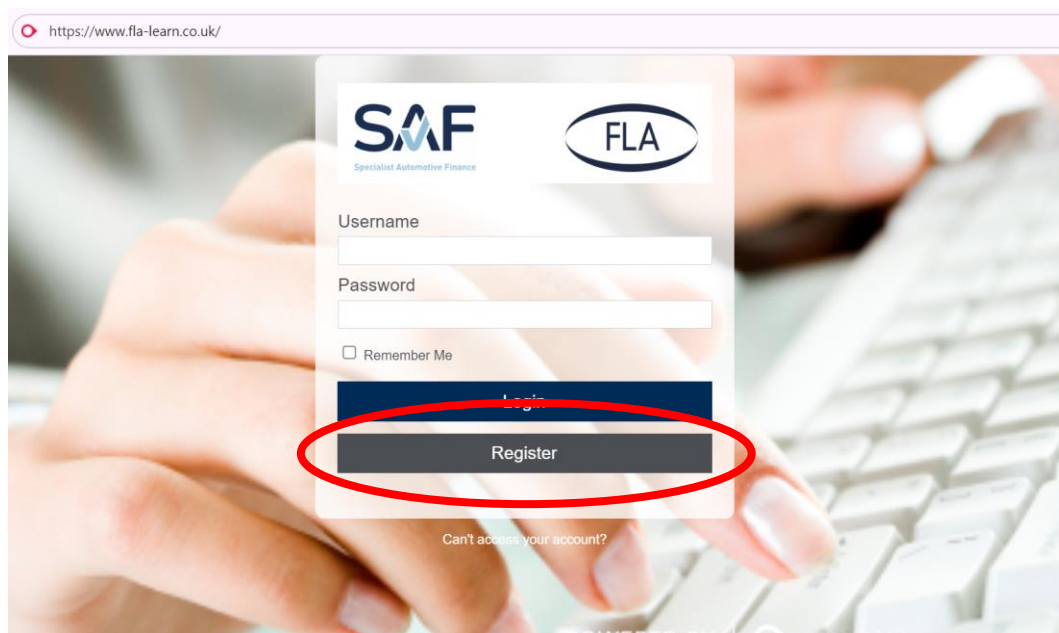


How to Register your company for a SAF account

1. Either go to www.fla-learn.co.uk OR from the SAF website www.specialistautomotivefinance.org.uk, click on “Register” on the top right corner of the screen.



2. You should see the below page. Press “Register”



[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

3. Enter your Organisation name, your company FCA Firm Registration Number (FRN) and select your country.

fla-learn.co.uk/RegisterOrganisation?returnUrl=%2F

Remember, do not proceed if you are not happy to give this consent. You must also ensure that you have all necessary consents and permissions from individuals concerned before you submit any personal data to the FLA in the course of your activities as an administrator. This includes notifying such individuals that Proficiency Solutions will hold personal data about them (including their date of birth and test results) for the purpose of maintaining and verifying SAF Expert Tests that they have taken. The FLA will have access to such personal data even if an individual leaves his or her current place of employment, and may disclose this information to new employers and organisations with which such individual may become connected on request.

Organisation Name *

FCA Registration Number (FRN) *

Country

United States ▾

Next

Cancel

4. Enter your name and email address and create a password.

First Name *

Last Name *

Email Address *

Password *

Confirm Password *

Create Account

Previous

Cancel

Create Account

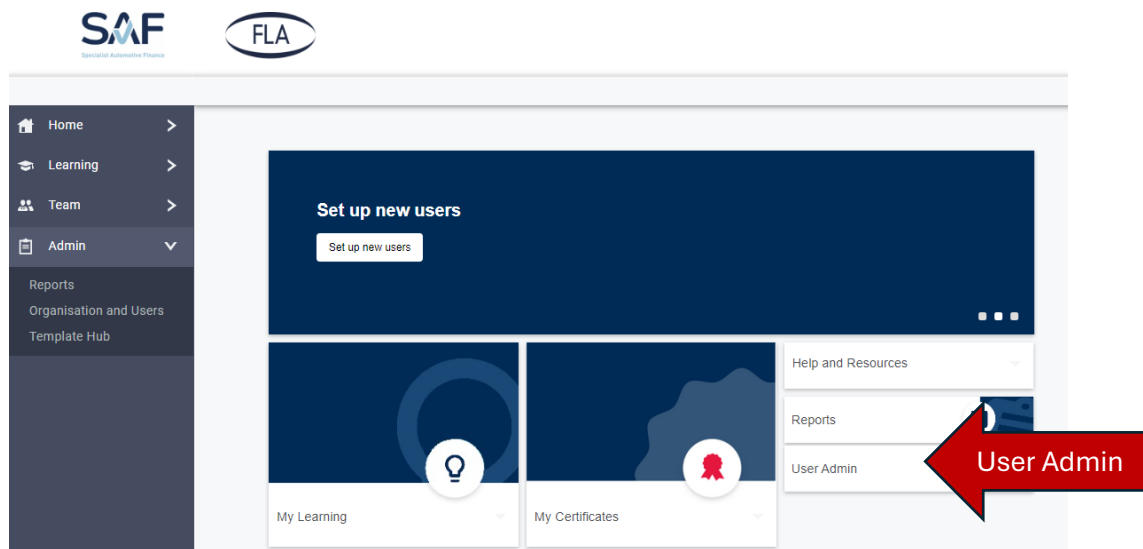
5. Click on "Create Account" and this will log you in, ready to set up your "Master Administrator" and your users.

Assign a Master Administrator

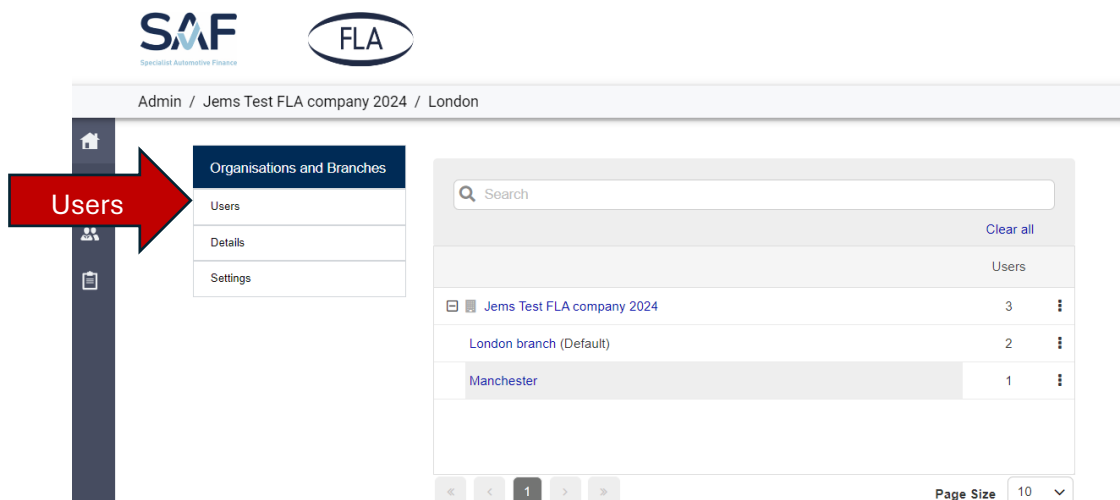
Master Administrators have access to the Company SAF Approved Compliance Statement. **There should only be one Master Administrator per organisation.** Multiple master administrators will cause confusion as to your company SAF Approved status.

Please note, if you are SAF Approved and you are changing the master administrator, please ensure the new Master Administrator makes a note of the SAF Approved renewal date. The new master administrator will not receive the reminders to renew this, as the form is tied to the person who completed it last.

1. Log in to your account and click on “User Admin”



2. Click on “Users” on the left hand menu



[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

- Click on the username of the person who you want to make the "Master Administrator". This will open their user record.

Organisations and Branches

Users

Details

Additional Information

Settings & Configuration

Mapping

New User

Search by Name, Username or Email Address

Active All Roles

USERNAME	FIRST NAME	LAST NAME	EMAIL	ORGANISATION	UNIT
Example.user@email.com	Example	User	Example.user@email.com	The Finance & Leas...	The Finan...

Click on username to open record

- Select "Master Administrator" on the left hand menu

Common Tasks

Details

About

Employment Details

My Preferences

System Roles

Reporting Lines

Documents

Compliance Statement

My Learning

Is a Test Taker

Master Administrator

Categories

Certificates

Example User

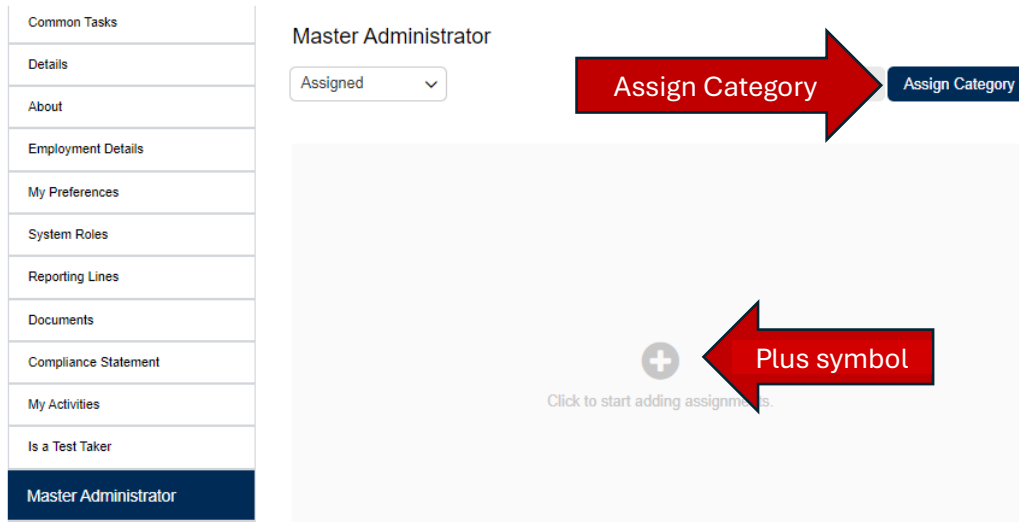
What would you like to do next?

- Set user roles
- View Training
- Set Line Manager
- Archive / Restore
- Go to details

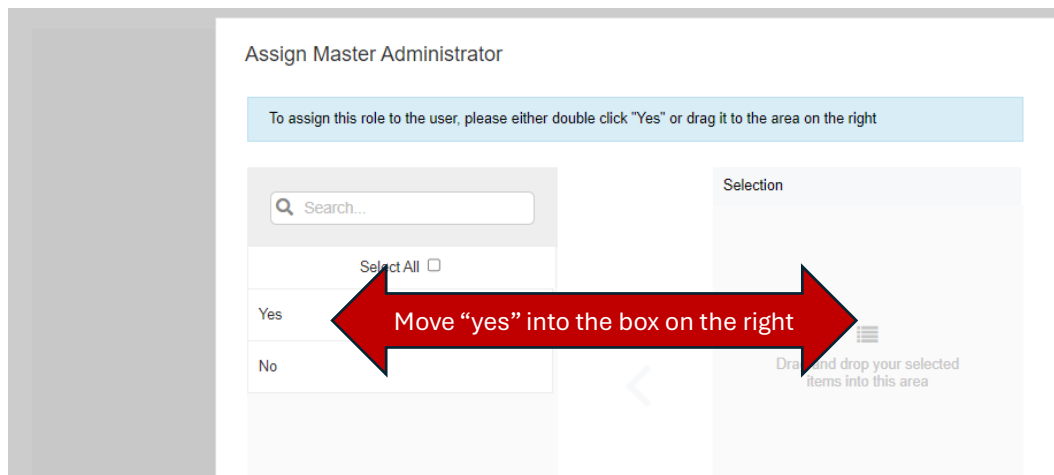
Click on "Master Administrator"

[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

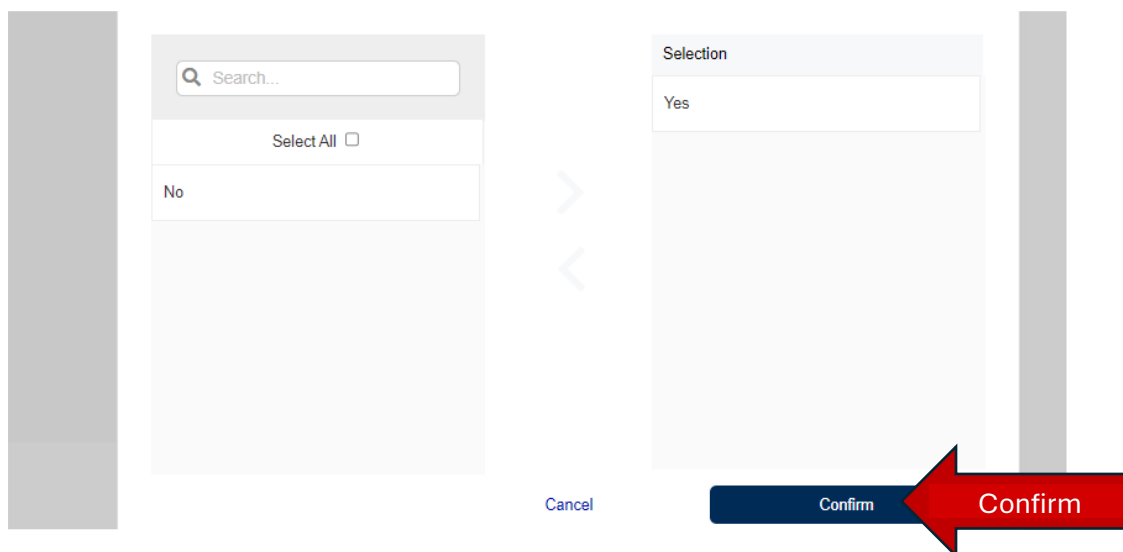
5. Click on either the plus symbol, or the "Assign Category" button



6. Double click on "Yes" or drag "yes" to the right "Selection" column on the right.



7. Press "Confirm"

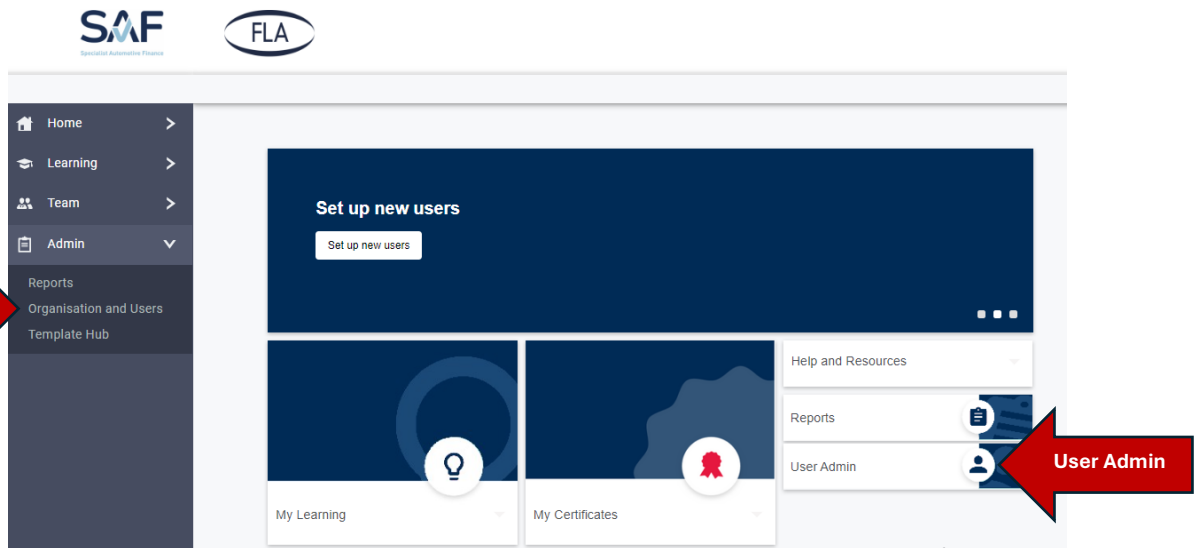


How to set up branches/sites on your account

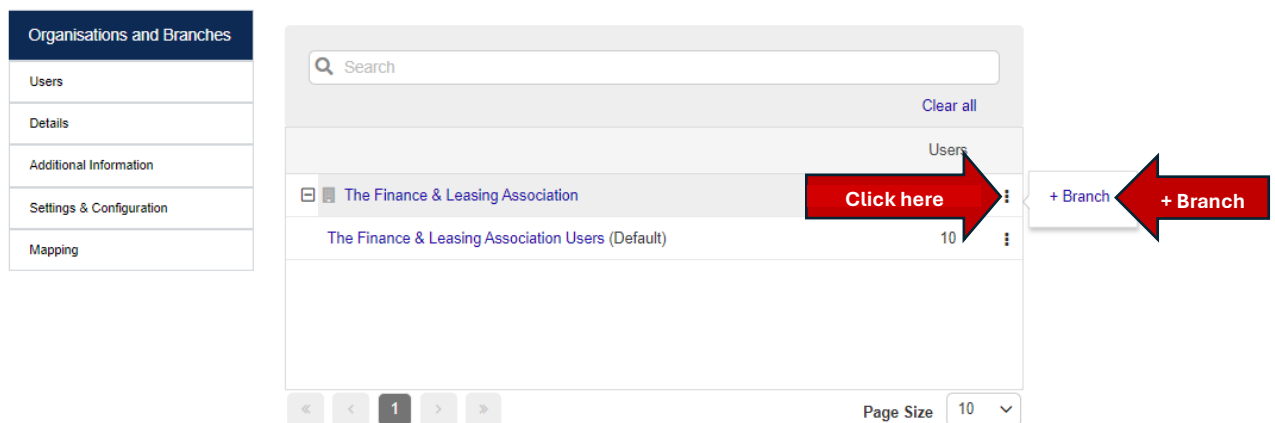
You can set up multiple branches/sites on your account by following the below instructions.

Please note, when you apply for SAF Approved Status, this is for ALL branches/site for the company (as it is registered with the FCA).

1. Log in and click on "User Admin" from the home page or "Admin – Organisation & Users" from the left hand menu.



2. Click on the three little dots to the right of your company name and click on "+Branch"



3. Enter your branch/site details and press "save"

New Organisation Branch

Name

FRN

Type
Division ▼

Identifier

Place or Building Name

Street Address

City

Postcode

Country

Save Cancel

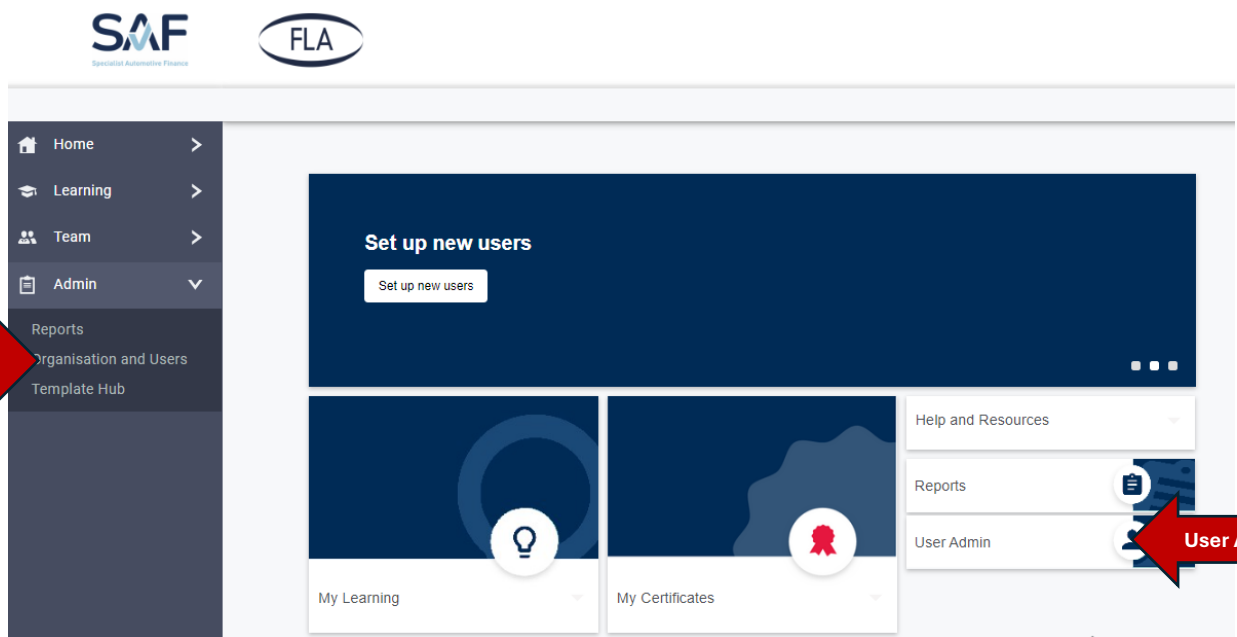
[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

How to set up and archive users

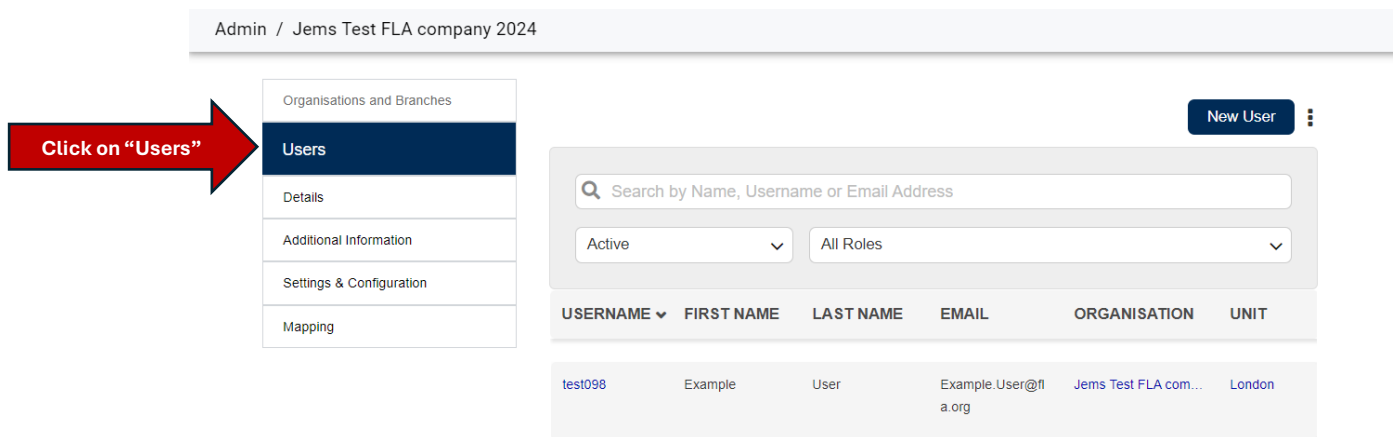
Administrators can set up new users and archive users who have left.

To set up a new user record:

1. Please log in and click on **"User Admin"** from the dashboard. You can also access this page by clicking on "Organisation and Users" on the left hand menu.



2. Click on "Users" on the left hand menu.



[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

3. Click on the “New User” button on the top right hand corner

Admin / Jems Test FLA company 2024

- Organisations and Branches
- Users
- Details
- Additional Information
- Settings & Configuration
- Mapping

New User
←
New User

Active ▾
All Roles ▾

USERNAME ▾	FIRST NAME	LAST NAME	EMAIL	ORGANISATION	UNIT
test098	Example	User	Example.User@fla.org	Jems Test FLA com...	London

4. Fill in the form with the users details and press Next.

You will need to create a unique “Username”. We recommend using the users email address.

**be cautious that your internet browser hasn’t pre-populated your password in the password box. Please leave the password box blank to provide the user with a system generated password*

Step 1 Details

Step 2 Confirmation

First Name

Last Name

Username

Email Address

Password

Please leave the password fields blank if you would like to provide the user with a system generated password.

Confirm Password

Role

If a role is not selected the user account will be created with the default user role.

- Reporting Administrator
- Content Creator
- Trainer
- Administrator

Organisation and Branch

Jems Test FLA company 2024 > London branch [Change Branch](#)

Next
Cancel

Reporting Administrator will allow the user to view Reports

Administrator will allow the user to view the administration pages and the reports

Content Creator and **Trainer** do not do anything, please leave these blank.

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5. Check the correct branch is selected, or change branch if required.

Please leave the password fields blank if you would like to provide the user with a system generated password.

Confirm Password

Role

If a role is not selected the user account will be created with the default user role.

Reporting Administrator
 Content Creator
 Trainer
 Administrator

Organisation and Branch
 Jems Test FLA company 2024 > London branch [Change Branch](#) ⓘ

Next **Next** **Cancel**

Check/Change branch

6. Press "Next"
7. Check the details are correct. Select the check box to send a registration email to the user. The registration email will contain their log in information.

Step 1 Details

Step 2 Confirmation

First Name
Example

Last Name
User

Username
Example.user@email.com

Email Address
Example.user@email.com

Password
(hidden)

Organisation
The Finance & Leasing Association

Organisation Branch
The Finance & Leasing Association Users

Role
Default user

Please tick the box if you want to send a registration email to user. ⓘ

Previous **Finish** **Cancel**

Tick the box to send a registration email

Finish

8. Press Finish

Assign the test to your user

Administrators can Assign or Un-Assign the test from any user by editing the users “is a test taker” category.

1. Please log in and click on “User Admin”
2. Click on “users” and search for the user for whom you want to assign/un-assign the test.

Admin / Jems Test FLA company 2024

3. Click the users “username” to open their user profile.
4. Select “Is a Test Taker” from the left hand menu
5. Click on “Assign Category”

[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

6. To ASSIGN the test, move YES into the selection box on the and press “Confirm”

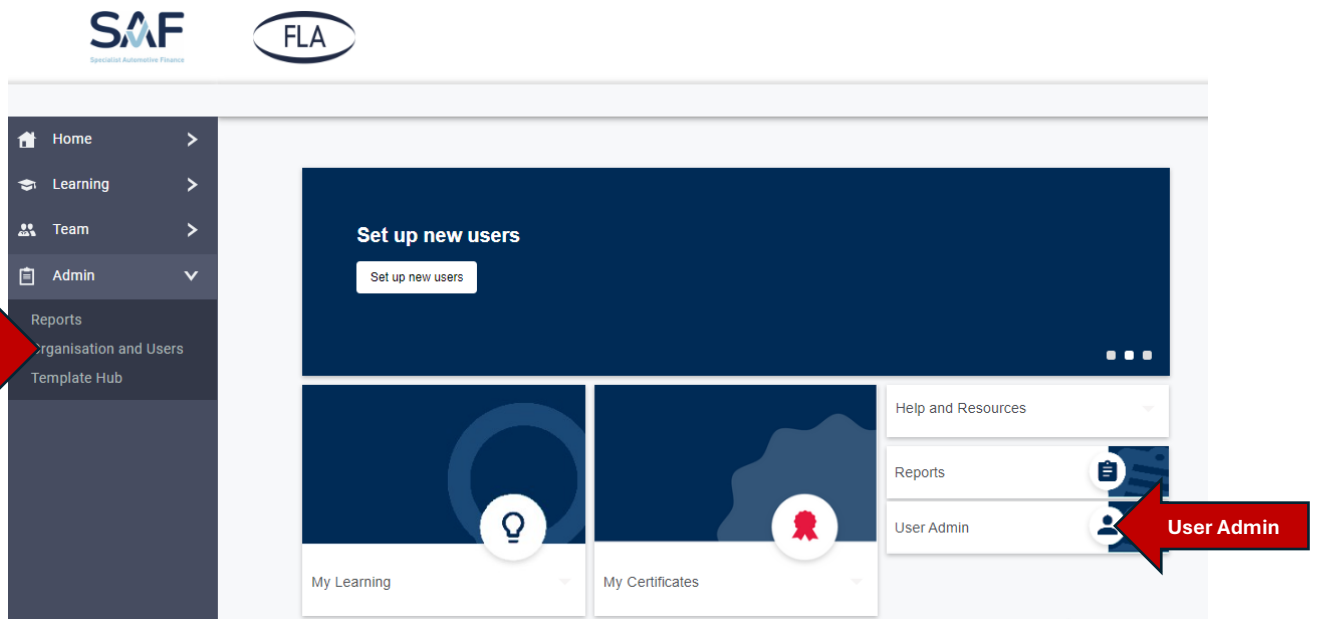
7. Please note, it may take 15-20 minutes for this to update. Ask the user to log in and out again to prompt the update.

To Remove the Test from a user

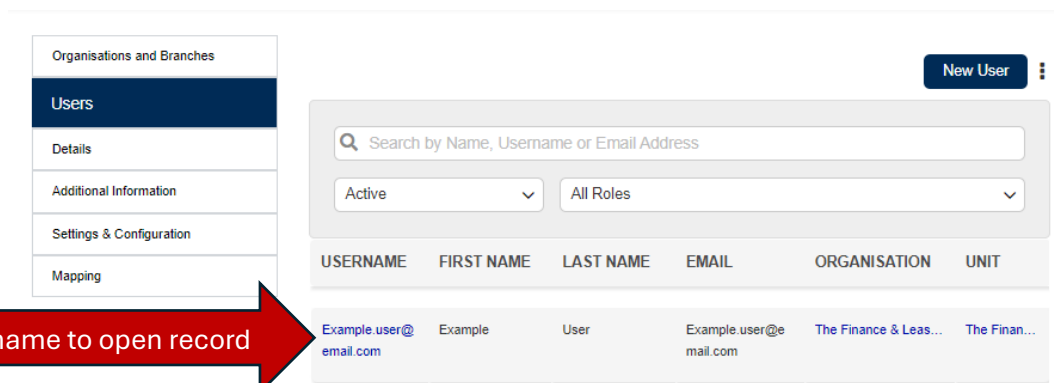
Click on “Categories” on the left hand menu and un-tick the “Yes” box next to “Is a Test Taker” and Save Changes.

Assign Admin and reporting privileges to a user

1. Please log in and click on **"User Admin"** from the dashboard. You can also access this page by clicking on "Organisation and Users" on the left hand menu.

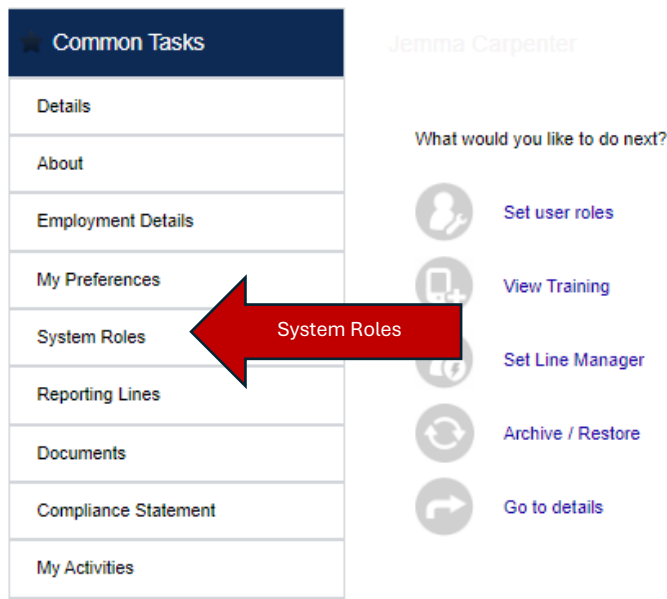


2. Click on the username of the person who you want to assign Administrator/Reporting privileges to. This will open their user record.

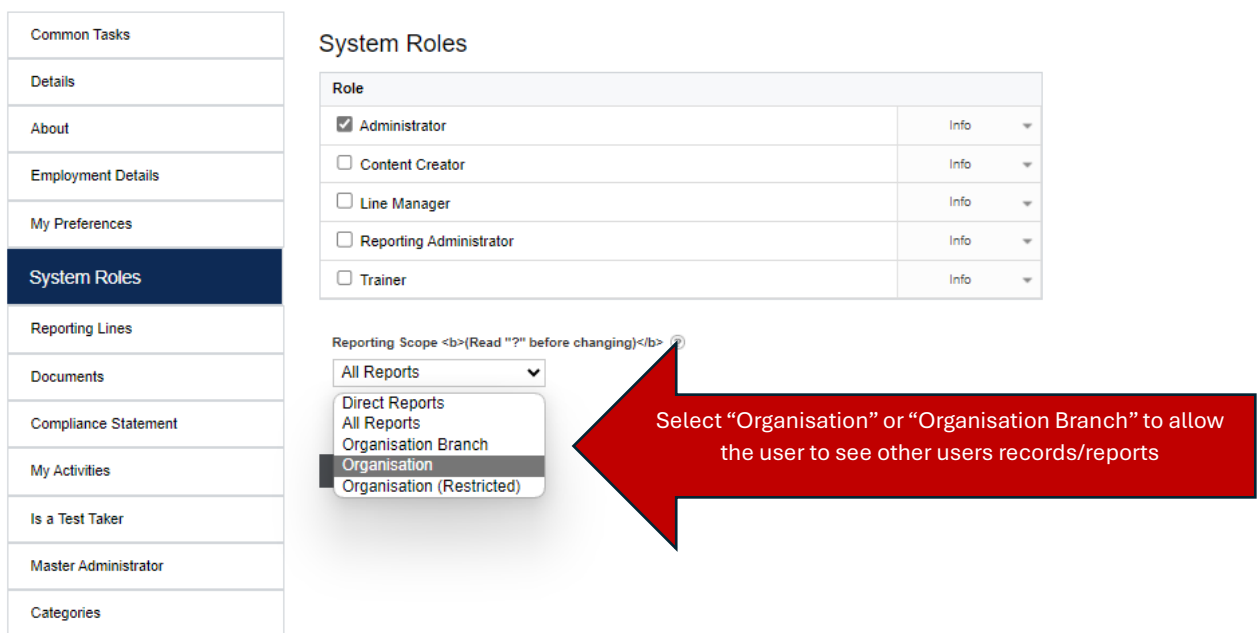


[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

- Click on “System Roles” on the left hand menu



- Select if you want the user to be an Administrator or a Reporting Administrator. An administrator can do admin, like set up users, as well as view reports, a reporting administrator can only view the reports. They will only be able to see the users in their “reporting scope”.



- Please ensure you select the correct “Reporting Scope”.

Reporting Scope

Organisation = views all user records within the organisation.

Organisation Branch = views only users within the same branch as the user.

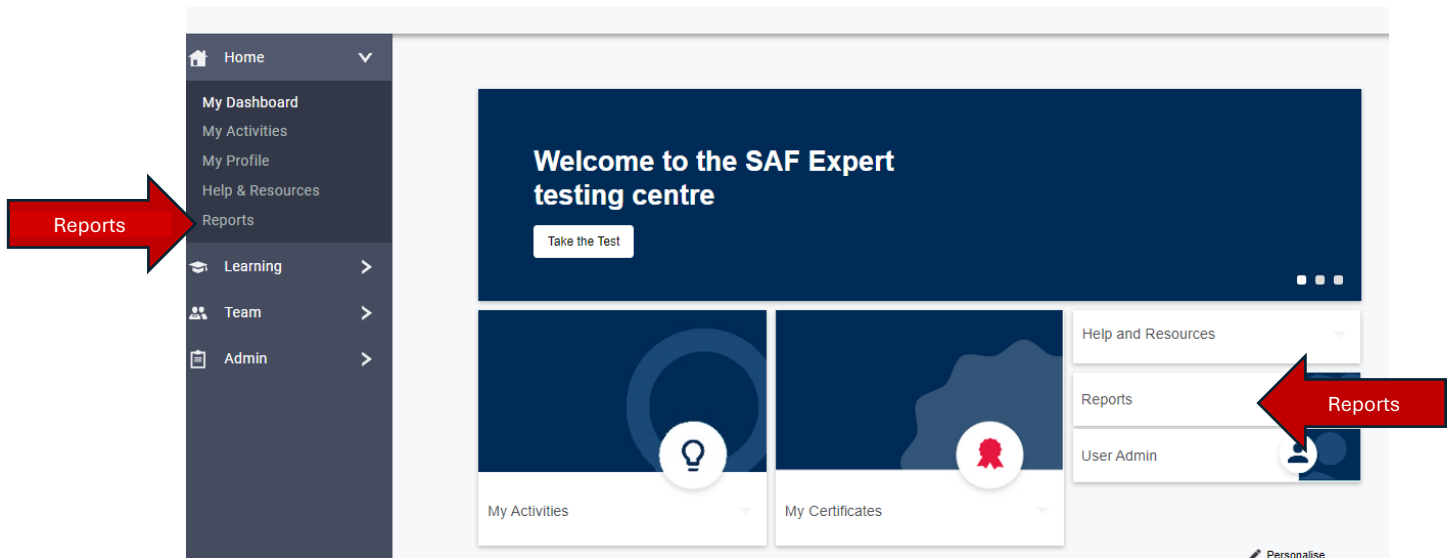
Direct Reports and **All Reports** will not give the user access to see any user records. Please do not select these options if you want the user to view admin/reports.

How to check total user passes for your organisation

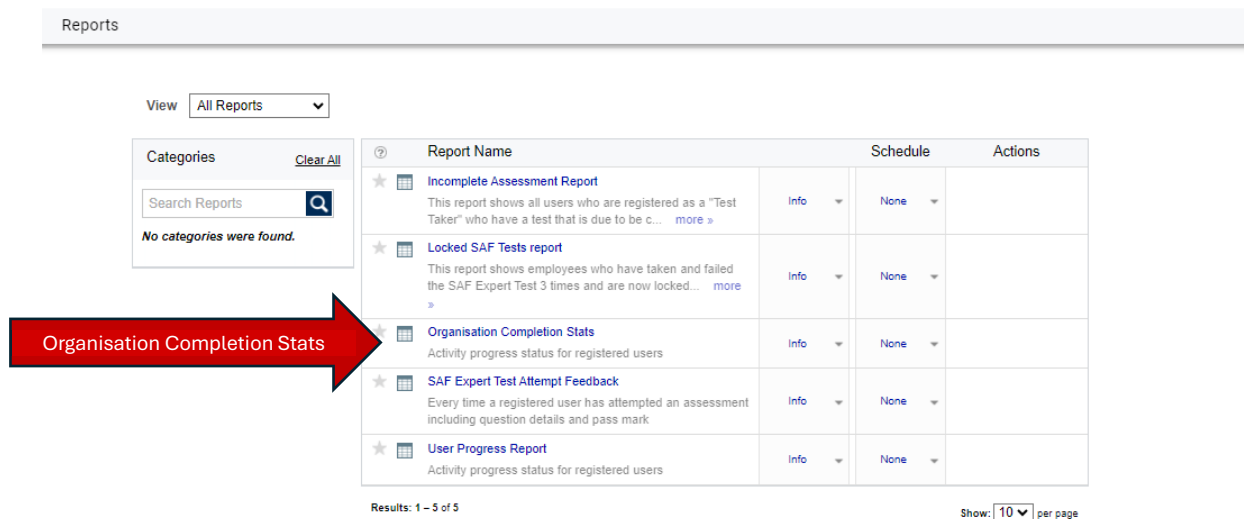
Before you apply for SAF Approved status, you need to ensure that all eligible users within your company (all employees involved in the sale or provision of information of motor finance), have a valid SAF Expert certificate.

Please note, only users who have been set as either “Administrators” or “Reporting Administrators” can view the reports. Check this setting within “[User Admin](#)”.

1. Log in and click on “Reports”, either from your dashboard or from the left hand menu



2. Click on “Organisation Completion stats”.



[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

Here you can see how many users in total are Certified, Expired, Due to expire and Not Certified.

Your total staff passes, will be the number of "Certified" PLUS the number of "Due to expire".

If ALL of your eligible users have a valid certificate, you are eligible to apply for annual SAF Approved status.

Reports / Organisation Completion S..

Save As... Email Report **Run Report**

Organisation Completion Stats

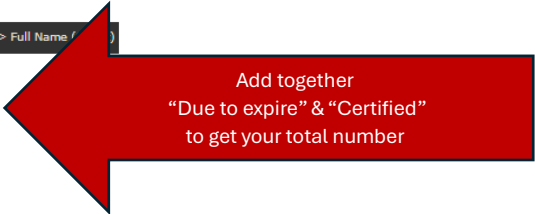
Activity progress status for registered users

Note: Report only shows first 1000 records. Export to CSV or XLSX to download the first 250,000 records.

Export... **Go**

Organisation Completion Stats		
Organisation Name	Certificate Expiry Status	Person > Full Name ()
Test Company	Expired	27
Test Company	Due to expire	98
Test Company	Certified	1917
Test Company	Not certified	25

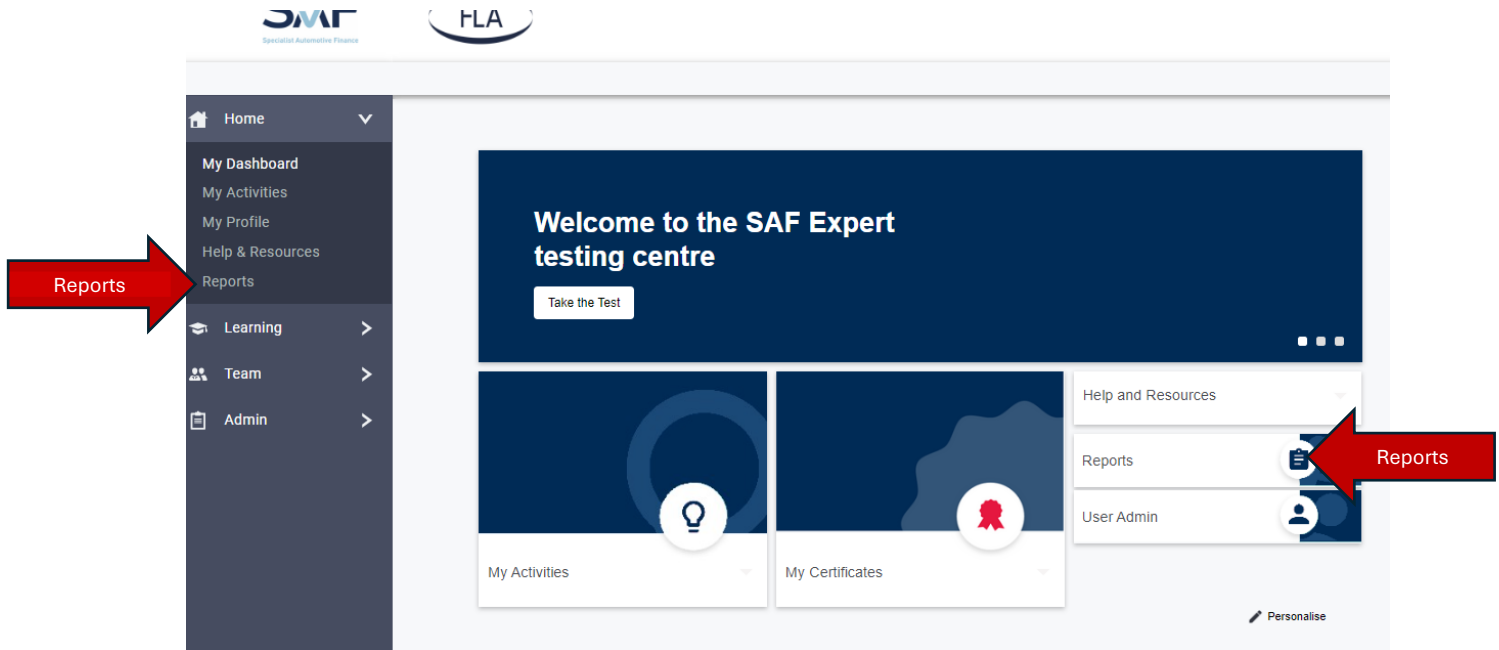
20/08/2024 14:43:52 1



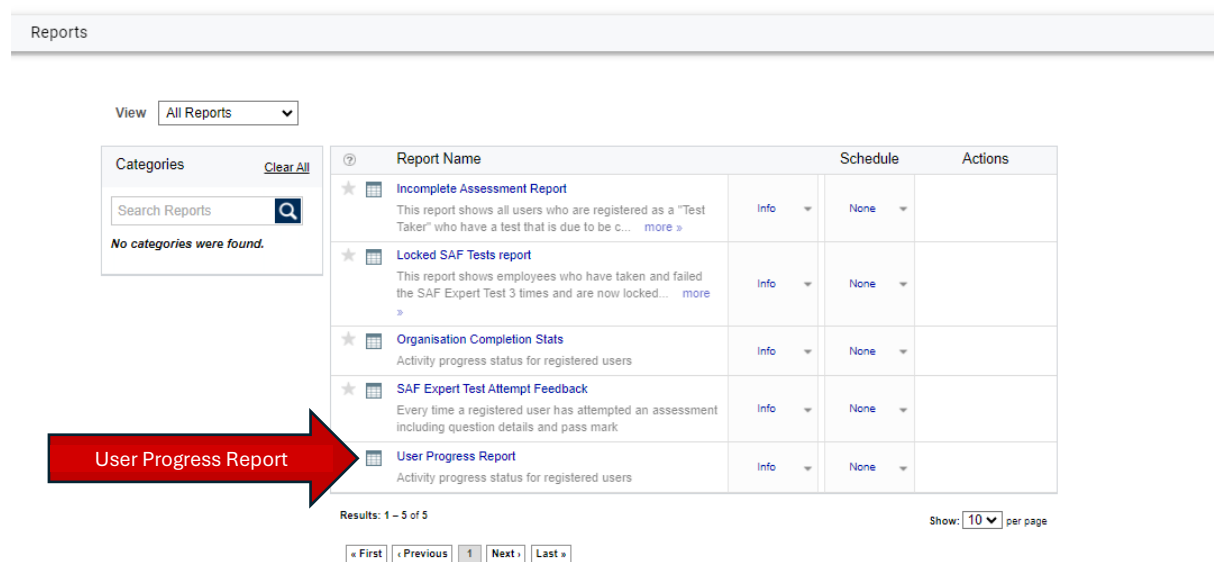
How to check the test status of your users

Please note, only users who have been set as either “Administrators” or “Reporting Administrators” can view the reports. Check this setting within “[User Admin](#)”.

3. Log in and click on “Reports”, either from your dashboard or from the left hand menu



4. Click on “User Progress Report”



[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

You will see the users on your report on screen, and this will detail if the user is currently “certified” or if their certificate has expired or not been attempted.

We recommend downloading the report onto a spreadsheet so you can check that all of your users are certified.

5. To download the report, please select the file type (eg XLSX (Microsoft Excel)) and press “Go”.

Reports / User Progress Report

Save As... [?] Email Report [?] **Run Report** [?]

User Progress Report

Activity progress status for registered users

Filters

Complete any filters (if applicable) as required.

Person Group - Is a Test Taker: Yes

Full Name:

Completion Status: All

Organisation Branch: All

Note: Report only shows first 1000 records. Export to CSV or XLSX to download ➔ Select file type and press “Go”

XLSX (Micro)

User Progress Report

Username	Full Name	Email	Organisation Branch	Activity Name	Certificate Expiry Status
Jemmac	SAFTesting_Saf	jcarpenter@fla.org.uk	The Finance & Leasing Association Users	SAF Expert Test	Not certified

When the report is in a spreadsheet like Excel, you are able to sort the spreadsheet by “Certificate Expiry Status” (column F) to see which of your users are certified.

AutoSave OFF User Progress Report (2) - Compatibility Mode

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Styles Cells Editing

H11

User Progress Report												
1	Username	Full Name	Email	Organisation Branch	Activity Name	Certificate Expiry Status	Completion	Certificate Number	Best S	Last Login	Person Job Title	Employment Code
2	Example user@email.com	Example User	Example.user@email.com	The Finance & Leasing	SAF Expert Test	Not certified		0		Yes		Yes
3	Jemmac	SAFTesting_Saf	jcarpenter@fla.org.uk	The Finance & Leasing	SAF Expert Test	Not certified		1	096	20/08/2024 11:11	Yes	Yes

How to apply for Company SAF Approved Status

Only users who are set to the MASTER ADMINISTRATOR will have access to the compliance statement. Please ensure only 1 user is allocated master administrator status to avoid duplicate applications.

To apply for annual SAF Approved Status for your Organisation, you are required to complete and return a statement of compliance to the FLA.

SAF Approved status is granted for the whole organisation, not by branch/site.

You will be asked to complete a declaration to confirm the total number of customer facing staff are in the organisation, who are involved in the sale, or provision of information of motor finance. All of these users must have a valid pass to be awarded SAF Approved status.

You will be asked to declare that you will ensure that all eligible staff within your organisation, pass the SAF Expert test within 4 weeks of joining/previous test expiry.

Before you apply:

1. Establish the total number of "SAF Eligible staff" your organisation has (this is the total number of all staff who are involved in the sale, or provision of information of motor finance)
2. Ensure all of your eligible staff have been set up on the SAF Assessment system and have a valid SAF Expert test pass (confirm by checking the user progress report).
3. Have your FCA Firm Registration Number (FRN) to hand (we use this to accurately report to the Finance companies as to which organisation are SAF Approved).

How to apply:

When you are ready to send in your SAF Approved compliance statement, please follow the below instructions:

1. Log in to your SAF Expert account.
2. Click on "My Learning"
3. Select and open the SAF Approved Statement of Compliance

The screenshot shows the 'My Learning' page in the SAF Expert system. On the left, a dark sidebar menu contains options: Home, My Dashboard, My Learning, My Profile, Help & Resources, Reports, Learning, Team, and Admin. A red arrow points to 'My Learning'. The main content area is titled 'My Learning' and includes instructions: 'Your assigned learning is shown, below. To start a learning activity, click on the Learning Name. To add new learning, simply head to the Find Learning area.' Below this is a table of learning activities:

Learning	Details	Progress	Due Date
SAF Expert Test	Info	Incomplete	29/01/2024 - 15/02/2025
SAF Statement of Compliance	Info	Not Attempted	None

At the bottom of the table, it shows 'Results: 1 - 2 of 2', 'Sort by: Learning', 'Asc', and 'Show: 10 per page'. On the right side, there are 'Views' (Outstanding, Completed, All) and 'Toolbox' (New CPD Act, Print this View, Download) buttons. A red arrow at the bottom points to the 'SAF Statement of Compliance' row in the table.

[TO GO BACK TO THE "HOW TO GUIDES" MENU – CLICK HERE](#)

- Complete each section of the form. You will need to enter your organisation name as it appears on your account, your FCA Firm Registration Number (FRN) and select which finance companies your organisation uses. You will also need to declare the total number of "SAF Eligible users" your organisation has here.

SAF Compliance Statement ..

- Introduction
- Organisation Details
- Submitter Details
- Ready for submission
- Feedback From FLA
- Submission edits
- Sign Off

SAF Compliance Statement 2024

Jem fla test 24 Carpenter

Introduction ≡ Stage 1

Please complete this form once all of your eligible users have passed the SAF Expert test to confirm SAF APPROVED status under the Finance & Leasing Association's (FLA) Specialist Automotive Finance (SAF) initiative.

To attain 'Approved' status, your company must meet the following criteria and adhere to the principles of the SAF Guidance Note as detailed below.

SAF Approved criteria:

- All eligible staff associated with the provision of motor finance information to customers must be SAF Experts and therefore hold a valid SAF Expert certificate, which is renewed annually;
- All new staff that meet the above criteria must hold a valid SAF Expert certificate prior to providing motor finance information to customers without supervision;
- The appropriate signatory for the company (Chief Executive or equivalent) has been provided with a copy of and commits to the company to adhering to the SAF Guidance Note.

Please indicate your compliance with the provisions of the SAF Guidance Note (which can be found under Help & Resources on the left hand menu) by submitting this Statement of Compliance to the FLA.

➔ complete each page and press "next"
 Next

- Submit form to The FLA
- The FLA will either,
 - Approve the form. You will see in your "Completed activities that the form is now completed" **The due date will appear 4 weeks before this is due to be renewed.**
 - OR
 - Send it back to you for more information. You will need then to review the FLA feedback given (this might be that you don't have as many test passes as your declared eligible user number) and re-submit the form.
- When the FLA are satisfied that you have enough valid SAF Expert test passes, they will sign off your compliance statement as "completed" and your form will be filed under "Completed" until it becomes due to renew.

JT Jem fla test 24 Carpenter | [Log out](#)

My Activities

My Activities

My Activities contains all of the activities that have been assigned to you. To start an activity, click on an Activity Name to launch.

View: Outstanding Activities
Type: Assessment (1)

Activity Name	Details	Progress	Due Date
SAF Expert Test	Info	Not Attempted	None

Results: 1 - 1 of 1 Sort by: Activity Asc Show: 10 per page

« First « Previous 1 Next » Last

Views

Outstanding

Completed

All

Toolbox

New CPD Activity

Print this View

Download

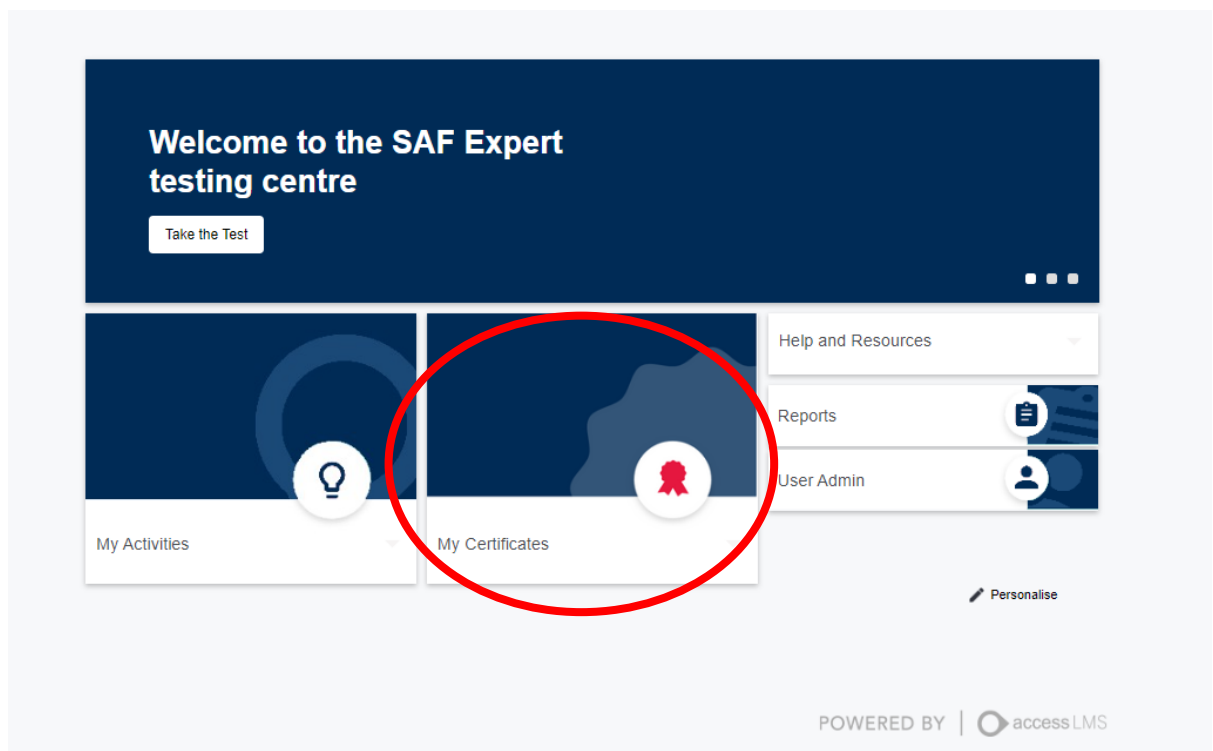
Form saved in "completed"

How to find your SAF Approved company certificate

Please note, only the master administrator on the account can access the company SAF Approved certificate.

SAF Approved certificates are only available SAF Approved applications from 2024 onwards. If you were SAF Approved in 2023, your certificate from the Proficiency Solutions system is still valid until it's expiry date.

1. Log in to your SAF Account.
2. Either go to "My Profile" or click "My Certificates" from the home page



3. Click on "Certificates" on the left hand menu

4. Click on the green "print" icon

The screenshot shows the SAF user interface. At the top left are the SAF and FLA logos. In the top right corner, there is a user profile icon labeled 'JT Jem fla test 2'. Below the logos is a 'Profile' header. On the left is a dark navigation menu with items: Home, My Dashboard, My Activities, My Profile, Help & Resources, Reports, Learning, Team, and Admin. A red arrow labeled 'My Profile' points to the 'My Profile' menu item. In the center is a 'Details' sidebar with a list of options: About, Reporting Lines, Settings, Password, Compliance Statement, Is a Test Taker, Master Administrator, Categories, and Certificates. A red arrow labeled 'Certificates' points to the 'Certificates' option. On the right is a 'Certificates' table with the following data:

Date	Activity	Score	Print
05/02/2024	SAF Compliance Statement 2024	N/A	

Below the table, it says 'Results: 1 - 1 of 1' and 'Sort by: Date Desc Show: 10 per page'. A red arrow labeled 'Print' points to the print icon in the table.

If there is no certificate there, and you are the master administrator, please see the "How to check if you're SAF Approved" guide.

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How to Unlock a failed SAF test

If a user has failed the SAF Expert test 3 times, they will be unable to have any further attempts and the test will “lock”.

Administrators will need to check the **locked SAF test report** to check if any users require their SAF test to be “unlocked”.

Unlocking the test, will reset the users test status and they will have 3 further attempts.

HOW TO SEE WHO HAS A LOCKED TEST

Any administrator/Reporting administrator can view and open the “Locked SAF Tests report” from the Reports menu.

The screenshot shows the 'Reports' section of a web application. A dropdown menu is open, displaying a list of reports. The 'Locked SAF Tests report' is circled in red. The list includes:

- Incomplete Assessment Report**: This report shows all users who are registered as a "Test taker" who have a test that is due to be taken.
- Locked SAF Tests report**: This report shows employees who have taken and failed the SAF Expert Test 3 times and are now locked.
- Organisation Completion Stats**: Activity progress status for registered users.
- SAF Expert Test Attempt Feedback**: Every time a registered user has attempted an assessment including question details and pass mark.
- User Progress Report**: Activity progress status for registered users.

Users who have failed the SAF test 3 times and are now locked out will appear here:

The screenshot shows the 'Locked SAF Tests report' page. It includes a title, a description, and a 'Filters' section. The filters are set to 'Full Name: jemma carpenter' and 'Has Reached Maximum Attempts: Yes'. Below the filters, there is a table with the following data:

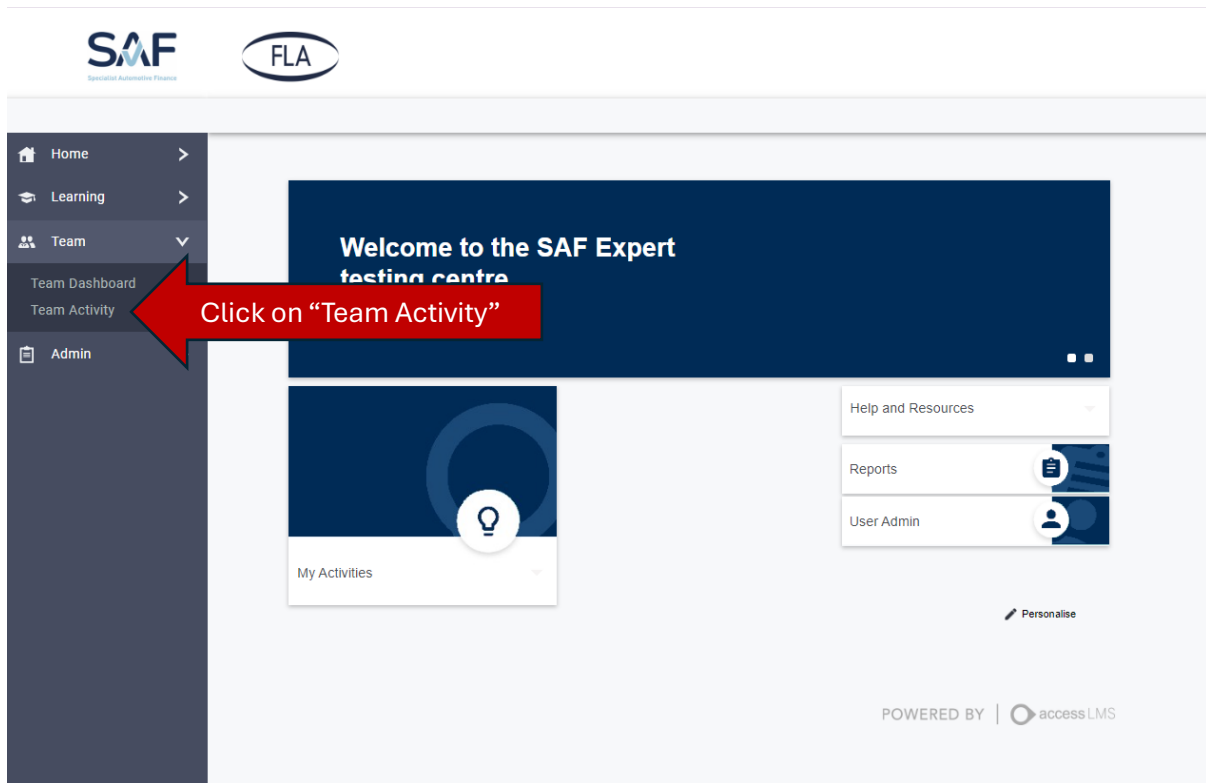
Full Name	Username	Employee ID	Organisation Branch	Activity Name	Success Status
Jemma Carpenter	Jemma		The Finance & Leasing Association Users	SAF Expert Test	Failed

The first row of the table is circled in red. The page also includes an 'Export...' button and a 'Go' button.

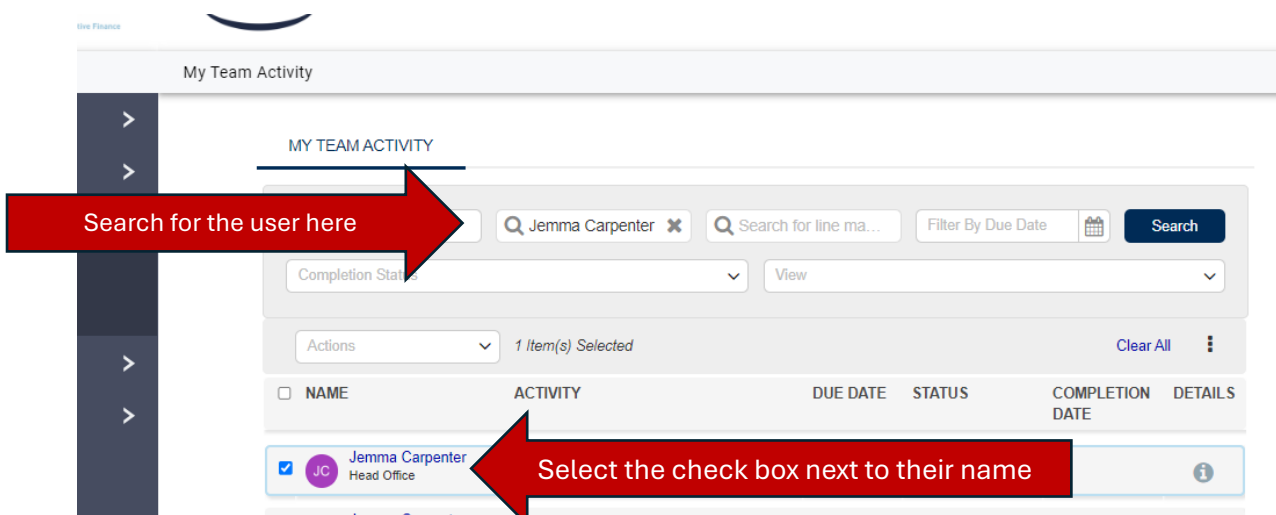
HOW TO UNLOCK THE USERS TEST

an administrator will need to log in and follow the below steps:

1. Click on Team Activity



2. Search for and select the user by ticking the checkbox next to their name



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3. Click on the drop down “Actions” menu and select “Reset Status”

This will automatically reset the users test status to “Not Attempted” and they will be able to take the test 3 more times.

MY TEAM ACTIVITY

FYI

The user will get the below pop up notification if they try to take the test when this is locked.

You have reached the maximum number of attempts permitted for this assessment.

SAF Expert Test

Assessment Information

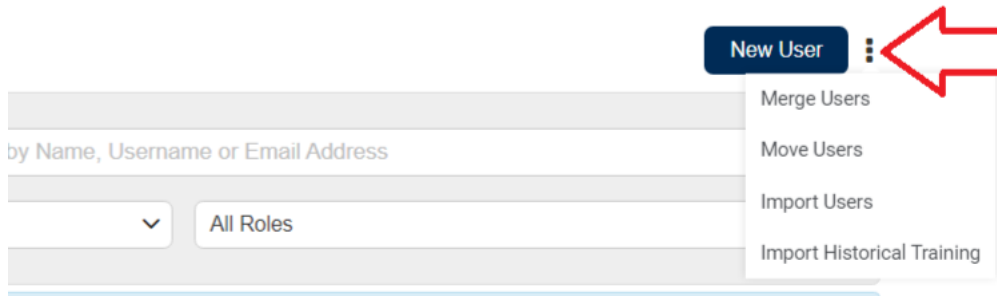
Question	Passmark	Maximum Number of Attempts	Time Limit
60	75 %	3	01:00

Close

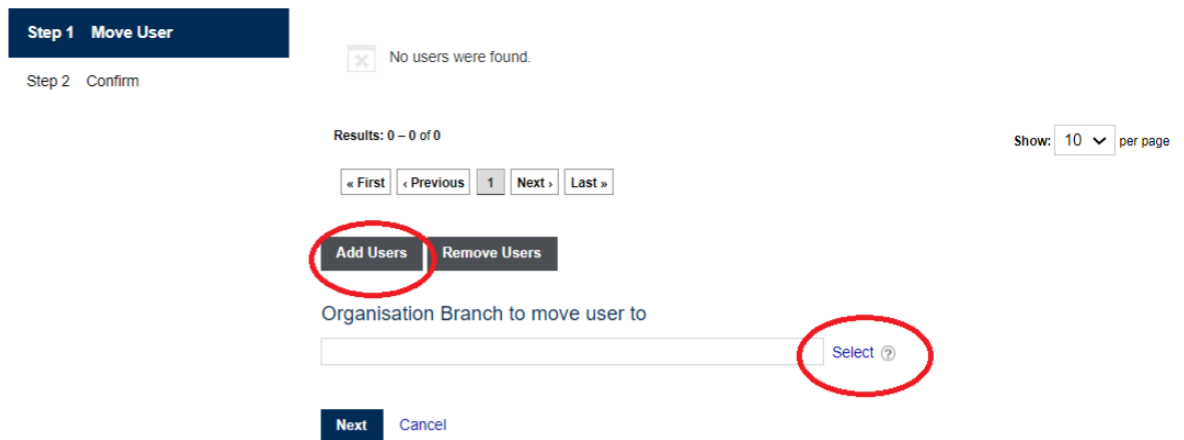
How to update a users branch/site within your company

Users can be moved by administrators set up on the account.

1. Please log in and click on “User Admin”
2. Here you will need to click on the 3 little dots located on the top right, next to the “New Users” button.



3. Click on “Move Users”
4. Select Add users and select the users you want to move.



5. Select the branch you want to move the users to.