Training provider handbook

We've compiled essential information based on the questions new IOSH-licensed training providers ask most often about course administration and working with IOSH. If you have any questions or comments, please contact our customer services team.

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General information for becoming an IOSH-licensed training provider

Nominated IOSH member

Each organisation we approve must have an IOSH member who has overall responsibility for ensuring compliance and standards. The person you put forward is known as your 'nominated IOSH member'.

They'll take responsibility for:

- making sure your training is delivered to a high standard
- making sure your delegates are given an end-of-course
- assessment under agreed examination conditions
- making sure the assessments are marked correctly and fairly
- ensuring that any appeals or complaints from delegates are effectively resolved
- sharing information with everyone in your organisation who needs to know
- accountable for overseeing the end-to-end quality process
- making sure all processes and procedures required by us are carried out correctly.

Please note that there are different categories of IOSH membership. The membership category required for your nominated IOSH member varies according to the licences that your company decides to take. For more information, please see the full breakdown of the Nominated Member's role responsibilities on our training provider Knowledge Hub.

Trainer requirements

Every person involved in the delivery of an IOSH course will need to be approved by IOSH. Approval is required for each individual training provider they deliver courses for.

All new trainers of IOSH courses, as a minimum, will have to:

- be a Technical member of IOSH (a safety and health qualification is required)
- have up-to-date CPD
- have an adult training qualification at level 3 on a regulated qualifications framework (RQF) OR have successfully completed the IOSH Train the Trainer course
- have two years' substantial, face-to-face, training delivery experience.

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Some courses may have different requirements, specifically to do with sector experience and a higher level of IOSH membership. E-learning training providers will need to have at least one Technical Member of IOSH and where applicable with specialist knowledge.

For example, if you'd like to deliver our Leading Safely course, your nominated member must be a Chartered Member of IOSH, and your trainers at least Graduate Members of IOSH. For this course your trainers must be able to provide evidence of their experience, knowledge and skills of working with, and training, a senior audience. For more information on trainer requirements for a specific course, please visit our Deliver IOSH Courses page, or discuss with our team at business@iosh.com.

When can you start running IOSH courses?

You'll need to allow around two weeks for an IOSH-produced training course application to be processed.

We'll send your licences, and / or course materials when:

- you have the correct level of nominated IOSH member in place
- your trainers have met the required criteria
- all required documents have been uploaded
- you have passed our quality checks
- you have attended our onboarding meeting
- all your invoices have been paid.

Getting your own course approved by IOSH

If you are a training provider, you can apply to get your course approved by IOSH. As well as helping you improve your existing course, we bring the reputational boost of our brand. IOSH is recognised worldwide for excellence, high standards and thought leadership in safety and health.

Please find more information about our Tailored Course Approval service on our website or contacting our TCA team on Tailored.Courses@iosh.com.

Managing your course

Maximum number of delegates per course

In order to make sure your training meets IOSH's standards, you can have no more than 20 delegates on an IOSH face-to-face course (including virtual classrooms).

Using the IOSH logo to promote your course

As an IOSH-licensed training provider, you're entitled to use the IOSH logo on your training course promotional material, including your website. For each training provider, IOSH has developed a unique logo which includes their Approved Centre Number. The logo must not be used as a general endorsement of your company or your courses, and can only appear alongside relevant IOSH courses. More information on using the IOSH logo can be found in the Training Provider Marketing and logo usage guidelines. To request a copy of your training provider logo and the usage guidelines, contact the Commercial Admin Team at business@iosh.com.

The IOSH website and promoting your course

If you're a commercial training provider, your details will appear on the training pages of the IOSH website. Any courses you've notified to us will also appear on our course finder list. Please, therefore, make sure you keep your records up-to-date. More guidance on promoting your course can be found in the Training Provider Marketing and logo usage guidelines.

Online systems

The Training Provider Portal

The Training Provider Portal (TPP) is an online platform, which is available 24/7, that enables you to complete a number of administrative activities required for each of your courses. You can find a link to detailed user guide information within the Training Provider Portal.

Course Management System

The Course Management System (CMS) is an online platform that enables you to deliver your training. You can find the detailed user guide information for the CMS on the Training Provider Knowledge Hub.

Who has access to the online systems?

Course Management System

- Administrators
- Approved trainers to deliver presentation
- Nominated IOSH Member

Training Provider Portal

- Administrators
- Approved Trainers
- Nominated IOSH Member

Please do not share your log-in details with anyone. Online platform access is not for delegates.

Before you run a course

It is the Training Provider's responsibility to check and verify each delegate's identification before they start a course.

Face-to-face courses (virtual and in-person)

For every course you intend to run, please ensure you register your course by creating an event on the Training Provider Portal in advance of the course start date. It's a condition of your licence that all courses are declared to IOSH and that an IOSH certificate is issued to all successful delegates.

E-learning courses

All delegates on an e-learning course need to be registered with IOSH as soon as you grant access to your course. In order to do this, you will have been provided with the relevant guidance documents and system access to our Training Provider Portal when your Tailored course was licensed.

Workbooks

As per our Training Provider Agreement for IOSH-produced courses, an IOSH-produced delegate workbook must be purchased from IOSH and provided to each delegate by the training provider. Once a course has been completed, the workbook becomes the property of the delegate and is theirs to keep.

All workbooks must be purchased on a one-to-one delegate basis. Sharing of workbooks between delegates, or between delegates and other training providers is not permitted.

IOSH-produced workbooks are covered by copyright. The training provider cannot print or copy them or allow others to print or copy them.

Once purchased by the training provider, IOSH workbooks are non-returnable. To order delegate workbooks, place your order via the Training Provider Portal. Please order in good time. If workbooks are to be delivered directly to a venue, please make sure that a named person will be responsible for accepting them and liaising with the trainer.

Delivering Classroom-based assessments

IOSH-produced and approved course materials contain guidance for trainers on facilitating assessments, which should always be used by the trainer. Guidance has been provided below on the conditions assessments should be taken under. This is not an exhaustive list.

Spatial considerations

- Assessments should take place in a quiet area. Noise outside the room should be kept to a minimum – a notice sign could be displayed on the outside of the door of the classroom. The room should remain quiet until all papers have been collected.
- Delegates should be a reasonable distance apart to avoid the chance of copying (1m).
- An invigilator should be present during the assessment process.
- Delegates should not talk to each other - they should raise their hand and wait for assistance from the invigilator.

Material considerations

- Delegate workbooks should be closed and out of sight.
- All flip charts and any poster material should be removed from the walls prior to the assessment.
- Mobile phones or any other device should remain outside the room / with the invigilator.

Delegate instructions

- Delegates should be informed of the start time and end time of assessments.
- Delegates should be given instructions on reading each question carefully prior to answering.
- Delegates should be reminded to put their name on all assessment papers.

- Delegates should complete the document in ink.

- If Delegates make an error they should cross it out and initial by it.

- Delegates should be given the appropriate time to complete their assessments. When an assessment is complete the delegate should turn it over and remain quiet.

- Once the time is completed, delegates should be asked to finish the question they have commenced and turn their paper over.

What to do if a delegate fails

If a delegate doesn't pass the course assessment, you have two options:

1 Tell them that they haven't passed and can't receive a certificate. If appropriate, you can show them the marked assessment and discuss the marking. If you do this, you should make sure the delegate knows about the IOSH appeals procedure.

2 Tell them that they haven't passed and let them know how they can re-take the assessment. As with option 1, you can show the delegate the marked assessment and discuss it with them.

If you think that re-assessment is appropriate, you should ask the delegate to complete a different assessment paper, usually within 20 working days of the original assessment. If the delegate passes this second assessment, you will be able to enter their amended marks, via the 'Resit' option, on the Training Provider Portal.

If the delegate fails the re-assessment, you can show them the marked assessment and discuss it with them, but they won't be able to take another assessment unless they attend another full course.

If a delegate disagrees with the marks awarded at any stage, they can appeal to IOSH. It's your responsibility to tell delegates what their options are at each stage of the procedure. We recommend that you keep a written record of when and how you give delegates this information, and of any other decisions you make.

Appeals procedure

If a delegate wants to appeal against the marks you've awarded, there's a four-stage process:

1 Give the delegate a copy of their completed assessment paper.

2 Ask them to write to us at verifiers@iosh.com explaining the grounds for their appeal and enclosing all assessment papers for that delegate.

3 We'll moderate (or re-moderate) the assessment papers.

4 We'll let you and the delegate know our decision in writing, normally within 10 working days of receiving the appeal. IOSH's decision is final.

Virtual classroom or Videoconferencing delivery

The following process explains how you could run a course via videoconferencing technology that you may have traditionally run in a face-to-face classroom environment.

The following information has been designed to support you whilst you develop your own solution to meet the needs of your business and audiences. Our guidance provides some ideas to ensure your course delivery is effective and the assessment process is robust, to help maintain the standards required for IOSH course delivery.

Please note – this is designed to help your thought processes and to prompt you to develop your own solution that meets the needs of your business and audience. Courses delivered via videoconferencing are still considered to be face-to-face courses and differ from e-learning courses, which must be approved by IOSH.

Choosing to run a course virtually

Delivering an IOSH course virtually may be new to you, so IOSH has developed this guidance to support you, whilst maintaining the integrity and standards required during the learning process. We have created our videoconferencing guidelines to ensure that any course delivery outside of traditional methods adheres to the IOSH Training Provider Agreement.

We recognise that we have many different providers operating globally and want you to feel able to create a solution that meets your needs; therefore, the information we have put together has only a couple of items within it that you must adhere to, the rest is down to you.

Please note delegate numbers of a maximum of 20 still apply; we will not accept results for courses with more than 20 registered delegates.

Registering a virtual course

You must register your virtual courses via our Training Provider Portal prior to the course delivery date. When registering your course, please tick the "Video Conferencing" button to advise that the course will be delivered via your chosen videoconferencing method.

Ordering workbooks for virtual courses

Workbooks must be ordered through the Training Provider Portal .

IOSH cannot despatch physical workbooks to individual delegates. Orders of workbooks can be delivered to an address of your choice and then you will need to distribute the books to your delegates prior to the course start date.

Alternatively, you can order digital workbooks directly to the email addresses of your delegates through the digital portal.

Hosting your course virtually

The specific method of videoconferencing delivery is at your own choice, but courses should be delivered using a two-way videoconferencing platform. Additionally, please note that WhatsApp is not an appropriate platform for hosting or delivering IOSH training. Cameras should be on for the duration of the course and assessment.

We would advise setting out some ground rules with your delegates; training delivered virtually should emulate face to face courses, in that delegates must not be engaged in any other activity, such as work, whist attending an IOSH virtually delivered course.

We also request that you provide all delegates with a declaration that they must respond to via email to advise they agree with the terms and expectations of the assessment process. You must then store this along with their assessment papers once they have finished the course.

The declarations may read along similar lines of, "I (name) agree to undertaking the final assessment in exam conditions, doing nothing to reduce the integrity of the assessment, including referring to the internet, workbook or any other resources whilst the assessment is taking place."

You can choose your own wording, but the statement should clearly set out your expectations.

Virtual assessment papers

Editable PDF versions of the course assessments are available on the Course Management System. The delegates should complete their assessments using these documents which can be printed out or used digitally.

For approved Tailored Courses, you may offer assessments in a format which suits you as a provider.

Facilitating the assessment virtually

The course assessment must be conducted under exam conditions according to the guidelines set out above in Delivering Classroom Based Assessments, with the additional suggested guidelines below. Clear expectations should be outlined to your delegates early on to ensure they understand what is required of them during this time (along with their acceptance of the declaration).

The assessment process could be operated in the following ways;

- You may ask each delegate to do a sweep of the room they are working in to show they haven't any notes, workbooks or other material that could give them an unfair advantage during the assessment.
- You may wish to increase your level of assurance by implementing use of software which locks down delegates' internet browsers. We appreciate that this kind of technology may not be viable to some companies, these options have been outlined for you to consider.
- Having sufficient terms and conditions around malpractice for your delegates, reiterating appropriate examination practice at the start of the exam with confirmation that this is understood (including their signed declaration), could be a reasonable alternative to use of software.
- To further minimise malpractice delegates should show an acceptable form of ID to the camera prior to the assessment, as they would for a face-to-face course.

Once you are satisfied with your delegates environment, email out the assessment papers **at the point of assessment** – not before.

Delegates can either print the assessments and complete them on paper in front of their webcam, or complete a digital copy on their computer, with the webcam turned on.

Each delegate must be visible to you at all times during the assessment process.

Once complete, your delegates can either scan or photograph their paper copy and email it to you or email their completed digital copy assessment. It is not appropriate to administer or receive assessment papers via platforms such as WhatsApp.

Finally, you must request your delegates discard of both the blank paper and their completed paper – tearing / shredding it in front of the camera if it is paper based or deleting the file and email from their computer.

After the course

Course projects

For any course that concludes with a project for delegates to complete, including Managing Safely®, these projects must be submitted to the training provider within two weeks of completion of the course.

After you've finished delivering a course:

1 Upload your IOSH course results.

    a Remember to include the previous certificate number for every delegate who has taken any refresher course.

2 Your invoice will then be available for payment and can be viewed on the Training Provider Portal. If you have previously advised that purchase order numbers are required there will be an opportunity to enter your purchase order number before the invoice is created.

3 Pay your invoice and submit your delegates' papers (where applicable), and we'll send the certificates to you. Payment can be made either by Credit or Debit card via the Training Provider Portal or over the telephone on +44 (0)116 3500 900. You can also pay by bank transfer using the details on your invoice. Please remember to send your remittance advice to remittances@iosh.com so that the funds are allocated to the correct invoice.

4 Countersign the certificates (paper certificates only)

5 Forward all certificates to your delegates.

Late submission

This applies to any course (for example Managing Safely®) that requires delegates to complete a practical assessment in their own workplace and return it to you by a set deadline.

For any late submissions by delegates, please do the following:

• don't delay submitting the rest of your delegates' results while waiting for one or two who have failed to submit their assessments on time

• submit your results as normal, listing all course delegates, and the Training Provider Portal will indicate a 'fail' for those who haven't submitted their assessment on time

• mark the assessment as usual and, only if they pass the assessment, contact the Customer Service Centre who will be able to assist you. All you need to pay for is the certificate.

What to do if a delegate misses part of a course

As well as passing the end-of-course assessments, delegates must attend all sessions of the training course to be eligible for an IOSH certificate. So, if a delegate has missed part of the training, they must receive extra tuition from the course trainer to cover the missed subjects. The extra tuition must be given before the delegate takes the assessment for an IOSH certificate and within one month of the course end date.

Three-month rule for completing courses

As part of your Terms and Conditions of Licence, you must make sure that all IOSH face-to-face courses are completed and certificates are issued to delegates within 12 weeks of the date the course ended.

Submitting your delegates' assessment papers for moderation

You can send us your delegate papers by email to training@iosh.com. Please make sure the files are zipped. We don't recommend sending emails larger than 10Mb.

Keep your course papers for 12 months

Please keep all course papers for 12 months after the course has ended as these may be required for auditing purposes.

Official IOSH certificates

An official IOSH certificate must be issued to each delegate who has successfully completed an IOSH course and assessment - only official IOSH certificates may be issued.

Requests from delegates for replacement certificates

IOSH doesn't deal directly with your delegates, so if a delegate requests a replacement certificate, it's your responsibility to provide them with it. You can do this via the Training Provider Portal (TPP). Please refer to the TPP User Guidance for information on how to order replacement certificates.

Refresher training

IOSH recommends that delegates refresh their training every three years to keep their knowledge up to date. Delegates must sit the full IOSH Managing Safely course before they can attend the Managing Safely Refresher course.

Licence renewal

As an IOSH-licensed training provider, your licence renewal is due on an annual basis. You'll receive a renewal form and licence renewal invoice approximately six weeks before the expiry of your existing licence(s). You'll need to check and confirm that the details on the form are correct and pay the licence renewal invoice in order to continue being licensed for your chosen course(s) for a further 12 months.

Feedback, queries and complaints

IOSH product feedback forms

IOSH product feedback forms are delivered via Microsoft forms, and are accessible to training providers and delegates via the URLs and QR codes featured on PDF handouts we have stored in each product's document library. Trainers have one form irrespective of course, and delegates have course specific forms with tailored questions. The information gathered will be used to help aid decision making in all future product development and improvement.

Why are feedback forms digital?

The feedback forms are digital to ensure that IOSH is working in a way that reflects the modern workplace, putting the trainers and delegates first. There are multiple benefits of digital feedback forms.

- Instant reporting and feedback.
- Minimises manual scanning process.
- Enables quick changes and updates, ensuring that questions remain relevant and purposeful.
- Flexible with swift completion and submission.
- Environmentally sustainable, removes paper-based documentation where not essential.

Receiving delegate feedback from digital forms

Feedback forms completed online via Microsoft Forms will be directed, almost instantly, to the email address you provide to your delegates on a PDF template for the course-specific form (samples shown below).


It is recommended that this is either your administration email address, or a dedicated feedback inbox of your choosing. Please note that this email address is where your copy of your delegate's feedback will be delivered to.

Editing the digital feedback form template

Training providers are required to edit the PDF information template for each course to include the appropriate training provider name and number, course reference number and preferred email address. This information is important to ensure that we provide the correct delegate's feedback to each training provider.

Ensure you are providing the email address correctly to delegates, as feedback will be provided to the address as written. See the below examples for how your email address should appear on the PDF handout, and be entered by the delegate.

Training provider handbook
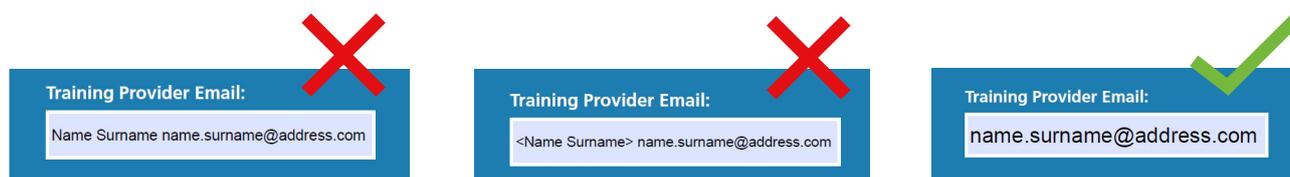
Where to find your training provider ID number

This is the training provider number you were issued when you became licenced with IOSH, usually between 2 – 4 digits.

Where to find your course reference number

The course reference number is listed on each individual course when registered on the Training Provider Portal, usually a 6-digit number.

Providing completed feedback forms for audit purposes

IOSH's Verification and Assessment Team have direct access to the digital feedback results and can access these at any time, so feedback from delegates completing the IOSH digital feedback forms does not need to be retained.

Feedback forms from Tailored courses not using the IOSH digital feedback forms should be retained for 12 months after course delivery for audit purposes.

Where to find digital feedback form templates

PDF templates with the feedback form links (both URL and QR Code formats) can be found in the document library section of each course on the CMS (alternatively on the LMS for Leading Safely).

There are both delegate and trainer feedback forms. Each form for delegates has an individual question set, relevant to the specific course they have taken, so please ensure that the delegate is provided with the correct course form link.

Dealing with queries and complaints from your delegates

IOSH doesn't deal directly with your delegates, so you're solely responsible for handling any queries or complaints you may receive. This is the case both before and after courses have run, and includes anything relating to fees, training delivery, certificates and any other matter (except the appeals procedure outlined earlier in this document).

Anything you're not happy with?

If there's anything you're not happy with, we'll do our best to help. Please contact the IOSH Customer Service Centre team at training@iosh.com or call +44 (0)116 3500 900, in the first instance to talk about it.

FAQs - IOSH-produced course accessibility

Can accommodations be made for delegates with disabilities?

The IOSH Reasonable Adjustments and Special Considerations Policy applies the principles of diversity and equality, and practical ways in which Training Providers can ensure individual learning needs are catered for. IOSH aims to ensure that unlawful and unfair discrimination is eliminated. In practical terms, this involves supporting Training Providers in catering for individual learning needs by considering reasonable adjustments and special considerations to the learning and assessment process.

For more information on this, please refer to the IOSH Reasonable Adjustments and Special Considerations Policy and form within the Policies and procedures document on the Training provider knowledge hub | IOSH.

Is it possible to receive a PDF or Microsoft Word copy of a delegate workbook for a delegate with accessibility needs?

Microsoft Word or equivalent copies of workbooks are not available and cannot be provided. Digital / PDF delegate workbooks can be purchased for delegates in place of or as well as hardcopy workbooks via the digital training provider portal. More guidance on digital workbooks and certificates can be found on the Training Provider Knowledge Hub.

What options are available for delegates with a hearing condition or impairment?

There are no current course adaptations available to be made for delegates with impaired hearing. Any animations throughout our courses do not contain audio and are presented by the trainer. If you wish to, trainers can provide adaptations such as sign language, written notes or captions / transcriptions in virtual classroom settings. There are not currently any transcriptions or alternative descriptions available for videos within the courses; this functionality will be implemented during future product updates where appropriate.

What options are available for delegates with a sight condition or impairment?

Digital delegate workbooks available through the digital training provider portal can be printed by the delegate onto larger size (for example A3) in order to improve visibility if needed. More guidance on digital workbooks and certificates can be found on the Training Provider Knowledge Hub.

Digital delegate workbooks and paper assessment forms can also be printed in black and white, or onto coloured paper for improved contrast for any delegates that are colour blind, as well as being able to view the workbooks online and adjust contrast and brightness as needed.

Are IOSH products compatible with screen reader technology?

IOSH products are not currently compatible with screen reader technology, however this is functionality that we acknowledge the importance of and will be implementing during future product updates.

Note: While current product documents are not formally set up for screen reader compatibility, delegates **may** find partial or limited compatibility when using a screen reader such as NVDA with digital pdf workbooks. IOSH do not guarantee any compatibility of current course documents with screen reader technology.

Can training providers customise course content for better accessibility?

Training providers can purchase digital workbooks for increased accessibility options for their delegates. As per the Training Provider agreement, Training Providers may also add to course materials in the form of statistics, policies and risk assessments, photos, slides and videos as long as the additions do not materially change the original materials or compromise the assessment process.

What steps are being taken to improve accessibility in future updates?

As IOSH courses are reviewed in the future, our aim is that all materials will meet WCAG level A standard as a minimum. We will keep you updated regarding this via the Training Newsletter.

About IOSH

The Institution of Occupational Safety and Health (IOSH) is the Chartered body for health and safety professionals. With 50,000 members in more than 130 countries, we're the world's largest professional health and safety organisation.

We set standards and qualifications, and support, develop and connect our members and others with resources, guidance, events, and training. We're the voice of the profession and campaign on issues that affect millions of working people.

IOSH was founded in 1945 and is a registered charity with international NGO status.

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