Digital training provider portal guide

Contents

Introduction 3
Contact us 3
Register and log in 4
Forgotten password 4
Navigate your home screen 5
Search and filter courses 6
Manage your accounts and pay invoices 7
Buy workbooks 7
Download reports 9
Face-to-face courses 10
Register face-to-face courses 10
Amend or cancel courses 11
Register face-to face course delegates 12
Register delegates for face-to-face CITB-mapped construction courses 13
Register delegates for face-to-face IOSH Managing safely refresher courses 14
Amend or cancel delegates 14
Submit results for face-to-face courses 14
Submit resit results 15
Amend or cancel results 15
Purchase digital certificates for face-to face courses 16
Leading Safely courses 17
Register Leading Safely courses 17
Register Leading Safely delegates 18
Amend or cancel Leading Safely delegates 18
Submit Leading Safely delegate results 18
Submit resit results for Leading Safely courses 18
Amend or cancel results for Leading Safely courses 18
Order Leading Safely delegate certificates 18
E-learning courses 20
Register e-learning courses and purchase digital certificates 20
Register e-learning delegates 21
Amend or cancel e-learning delegates 22
Submit e-learning delegate results 22
Amend or cancel results for e-learning courses 22
Purchase additional hardcopy certificates 22

Introduction

The digital training provider portal (digital TPP) enables you to take control of your IOSH courses, from registration through to results submission and certificate orders for your delegates.

Features:

- Access 24 hours a day, seven days a week.
- Register training courses and delegate information.
- Order workbooks in a few clicks.
- Enter assessment results and purchase certificates for delegates.
- Easy online account management.

The digital TPP links with our digital platform – the IOSH digital portal - where you will be able view workbooks you've assigned to your delegates, and issue digital certificates to your passing delegates once their course has been completed.

Full guidance on how to use the IOSH digital portal is available on our training provider knowledge hub.

Please note: this user guide has been written for desktop access to the digital TPP. If you are accessing on mobile, some screens may look a little different. Functionality remains the same.

Contact us

If, after reading our guide, we haven't been able to answer your query, or you would like to know more about anything we've covered, please contact our customer service team.

digitalsupport@iosh.com
+44 (0)116 350 0900

Opening hours
09:00-17:00 (UK time)
Monday-Friday

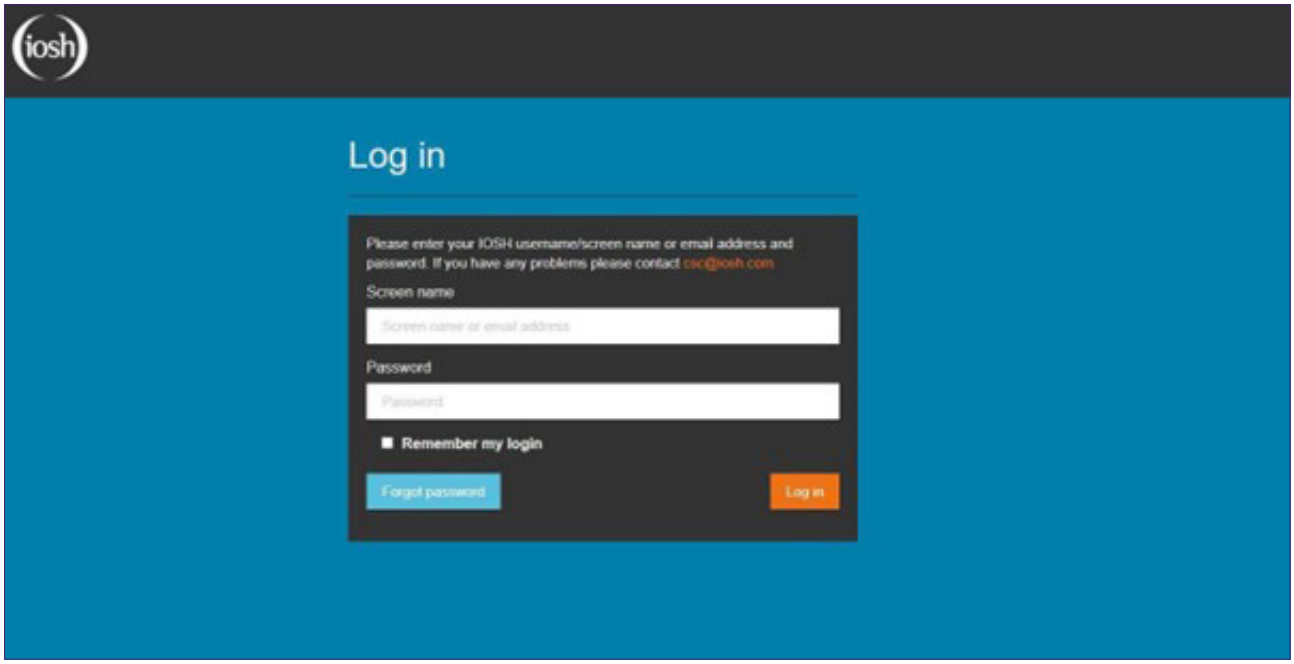
Register and log in

To log into the digital TPP, you'll first need to register on 'My IOSH' if you haven't already. Follow this link to register: https://www.iosh.co.uk/Registration.aspx.

The email address used to register must be the same as the email address held for you on our system. If you have any queries on this, contact us.

Once registered on 'My IOSH' (or if you're already registered), use the same email and password to access the digital TPP here: https://digitaltpp.iosh.com.

We recommend bookmarking this link for easy access.



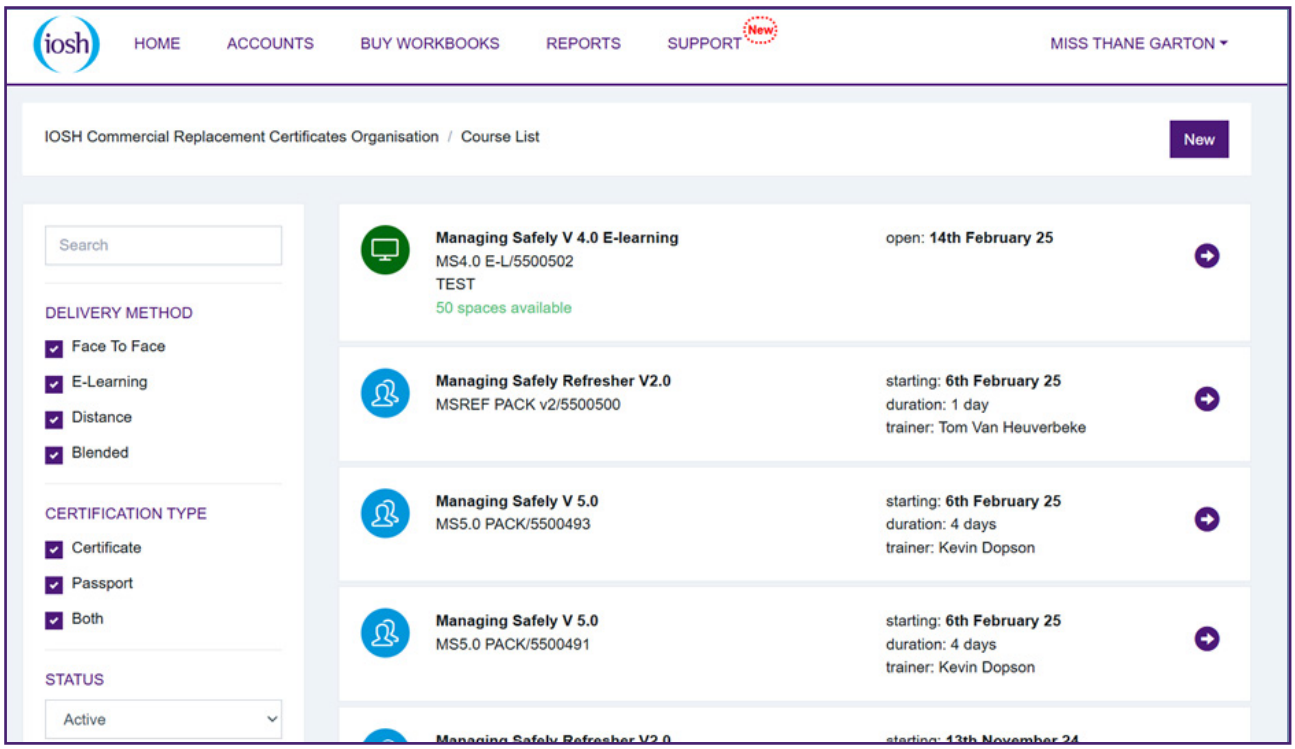
Forgotten password

If you have forgotten your password, click on 'Forgot Password' and follow the reset password process.

Note: You can opt to 'remember my log in'. This is a great way to access your account quickly.

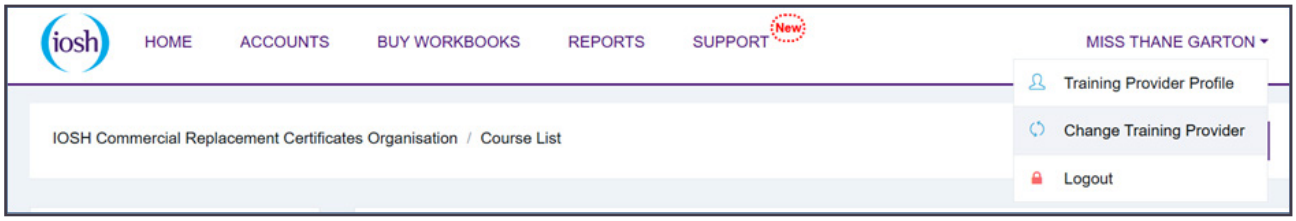
Navigate your home screen

Once you have successfully logged in to the digital TPP, you will see your home screen.



The top menu contains the following tabs:

- Home - clicking this while on any page in the digital TPP will bring you back to your home screen.
- Accounts - a summary page of your outstanding invoices and payment options. See the Accounts section for more information.
- Buy / Order workbooks - process and pay for your workbook orders. See the Buy workbooks section for more information.
- Course reports – download historic course and results data. See the Reports section for more information.
- Support: find full guidance on how to get the most out of the digital TPP.
- User button - your name with a drop-down function, including:
  - Training Provider Profile – provides an overview of your main contact's name, address and invoice details.
  - Change Training Provider – if you work for more than one organisation, you can switch between them here.
  - Log out.



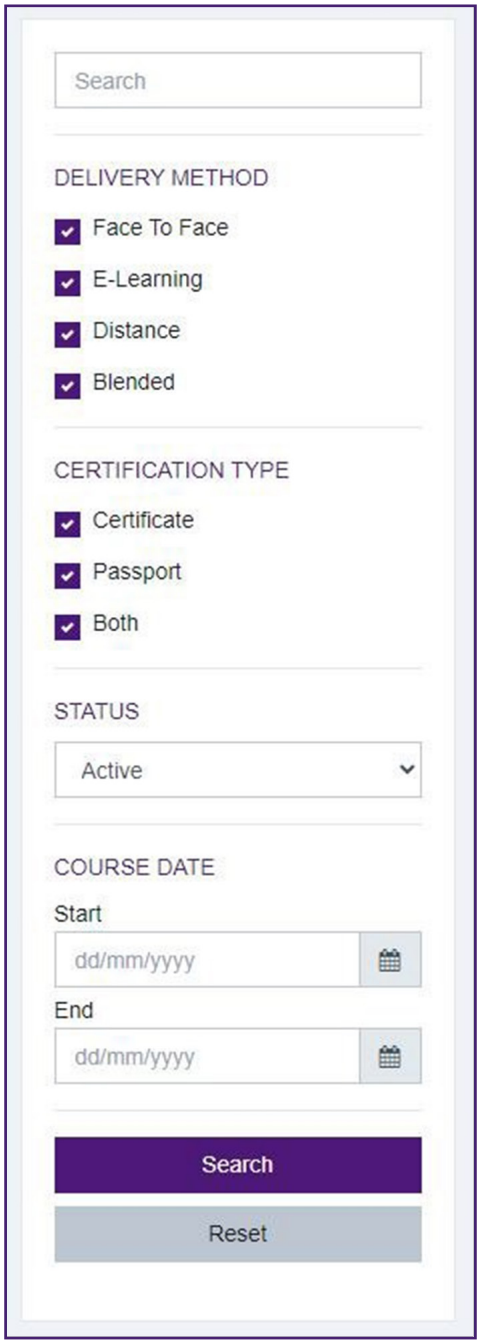
Search and filter courses

The search menu contains the following filters to make it easier to search for your registered training courses:

- Search: free type a search term to locate your course.
- Delivery method and certification type: tick and untick the relevant fields to filter through the courses you have on your account.
- Status: the status of your courses will fall under the following categories:
  - Active: course is registered and awaiting results
  - Cancelled: actively cancelled courses or those which are automatically cancelled if they're six months past the end date with no results submission
  - Awaiting results: courses with delegate registrations but no results submitted
  - Completed: results have been submitted
- Course date: search by course start and end date.

Useful tip. You can fast-track to your training course by typing '/course/' followed by your course ID (reference number) into the URL bar after the URL. For example: digitaltpp.iosh.com/course/123456.

Your course ID is automatically created when you register your training course.

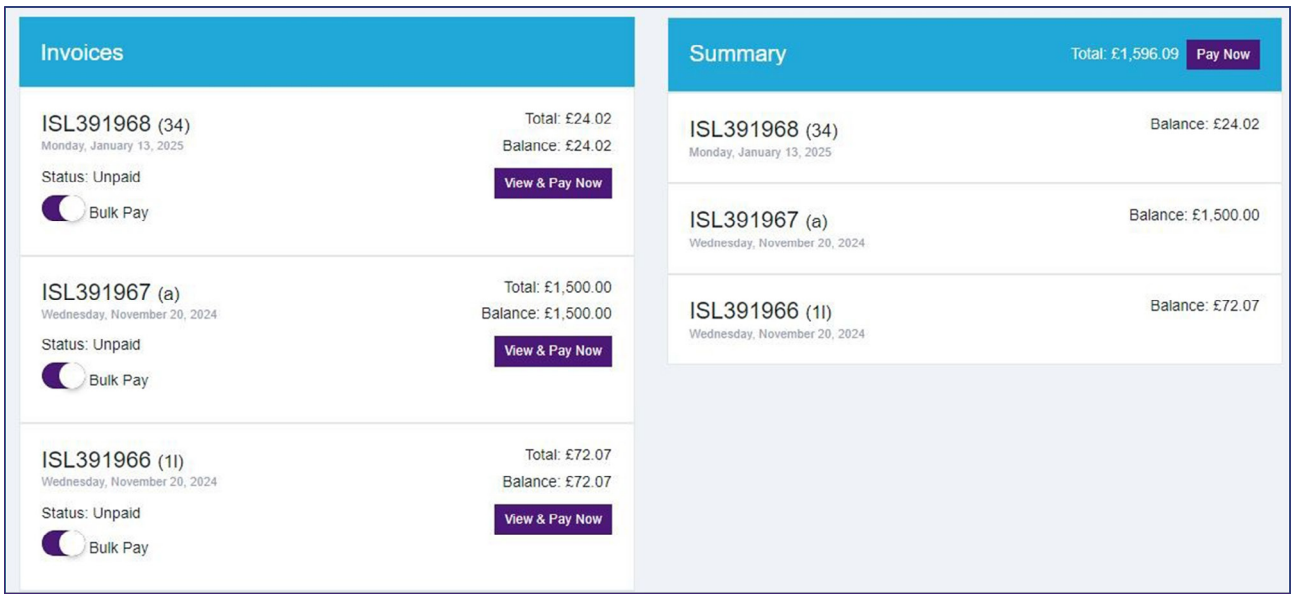


Manage your accounts and pay invoices

To access the 'Accounts' page, select the 'Accounts' tab in the top menu.

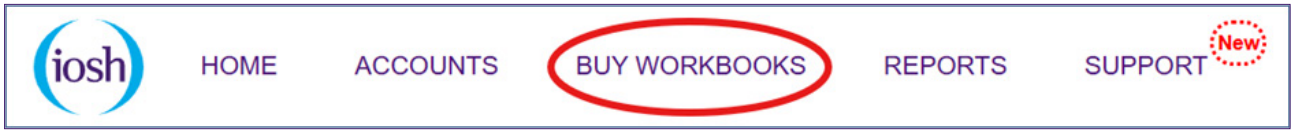
Once on the 'Accounts' page, you can view invoices and pay any outstanding invoices. It is possible to pay for more than one invoice at a time.

1. Select 'Accounts' from the top menu. All outstanding invoices will be shown as a list.
2. Select the invoice(s) you would like to pay by clicking the 'bulk pay' option under each.
3. On the right-hand side of the page a summary is shown. Select 'Pay Now', which will take you to WorldPay to enter your payment details.

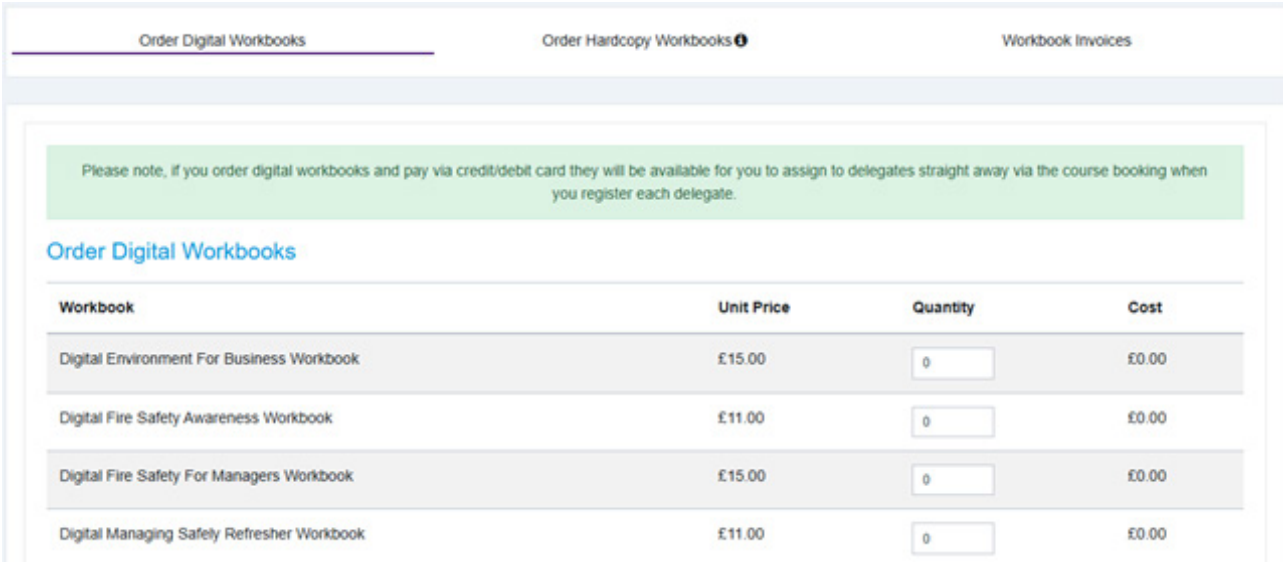


Buy workbooks

1. Select 'Buy workbooks' in the top menu.



2. By default, the 'Order Digital Workbooks' tab is selected. You must amend the quantity of books you wish to order before the total cost is calculated automatically. Once you have checked and are happy with your order, click 'Checkout'.
   Note: You will only be able to order workbooks for courses for which you hold current licences.



3 If required, hardcopy workbooks can be ordered separately via the 'Order Hardcopy Workbooks' tab. **There is a minimum order quantity of 5 hardcopy workbooks.**

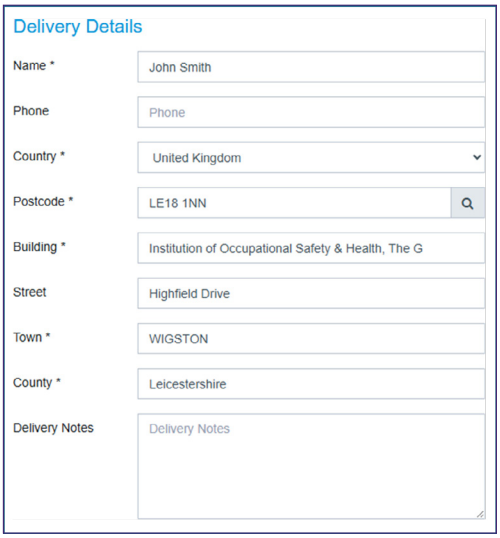
For hardcopy workbooks, you will need to review and update your delivery details if necessary. These are automatically populated as your main administration address.

For or a UK address: You can use the postcode search tool to populate a full address. Alternatively, you can enter the address manually by deleting and typing over the relevant fields.

For an address outside of the UK: You will first need to change the 'Country' and then ensure that you fill out all required fields and enter an accurate full address for delivery.

If you are requesting a shipment to India, the 'Delivery Notes' box must also include your delivery details.

Note: Separate orders must be made if workbooks are required to be delivered to more than one address.



4 Once you have finished entering the address, the order total will be calculated at the bottom of the screen. The total will include shipping costs and other charges if applicable. Once you have checked and are happy with your order, click 'Checkout'.

5 For both digital and hardcopy workbook orders, once 'Checkout' is selected, an 'Order Confirmation' pop-up box will appear. This will show an order summary and request a purchase order number (up to 10 characters), which is a mandatory field.

6 On entering a purchase order number, the payment options are enabled.

7 Payment options are ‘Pay Now’ and ‘Pay Later’.
Pay Now: available to all training providers for all orders. If you select ‘Pay Now’ you will be able to enter your payment details using WorldPay.
Pay Later: available only to training providers with a valid credit agreement and sufficient available credit with IOSH. Your available credit is calculated as your agreed credit limit minus your outstanding balance with IOSH. If you select ‘Pay Later’, an invoice will be generated automatically and emailed to your main admin contact. Payment can be made later by card on the TPP. Alternatively, you can pay via BACS, as per the details on the bottom of your invoice.

8 Once checkout is completed, hardcopy workbooks will be dispatched by our supplier. Digital workbooks will become available in an online inventory, ready for you to allocate to your delegates when you register them on you training courses.

Download reports

You can download your IOSH training course, delegate and certificate data reports on the portal. Reports can be filtered by date ranges of up to 12 months. Once you have downloaded your report, it will include the following:

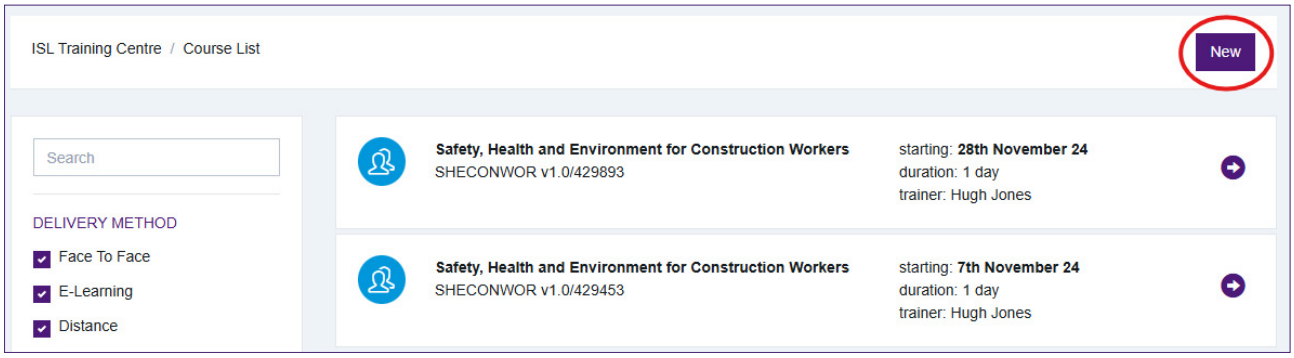
- Course ID and course name
- Course start date
- Delegate first name and last name
- First result: pass / fail
- Resit result: pass / fail
- IOSH certificate number

To find this function, click on the ‘Reports’ tab from your account dashboard.

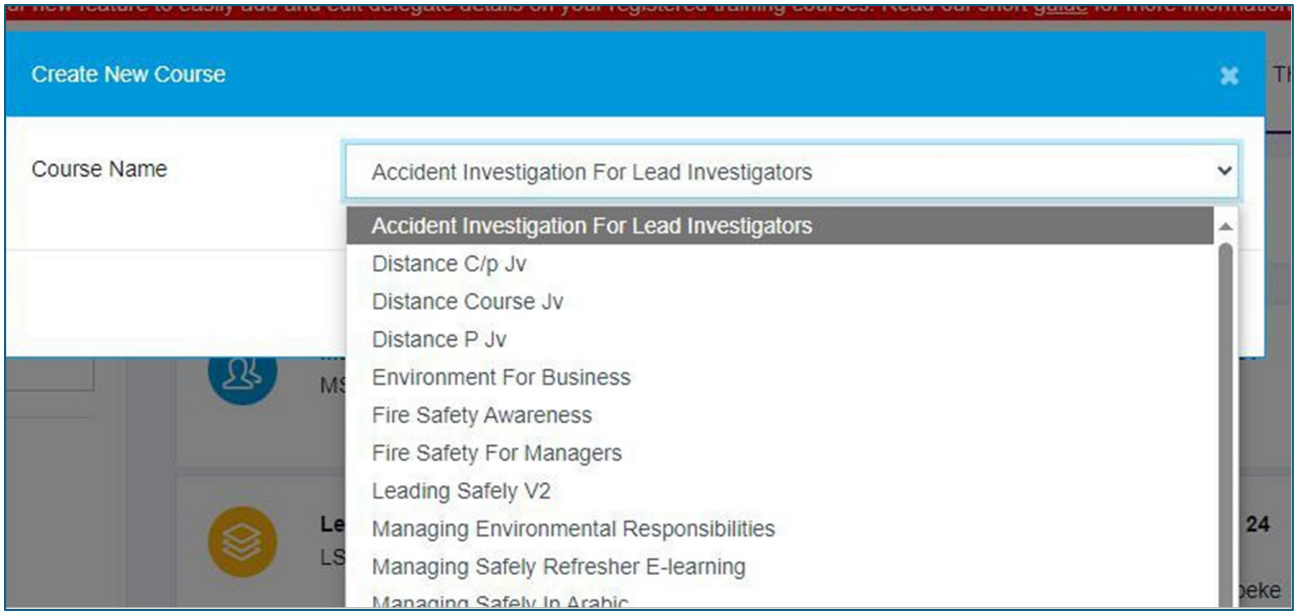
Face-to-face courses

Register face-to-face courses

1 On your home screen, select 'New'.



2 A pop-up box will appear with a 'Course Name' drop-down list. Select the course you plan to run from the list and press 'Continue'.
Note: Only courses for which you hold a current licence will appear on this list



3 The course registration screen will appear.

4 Complete the course information fields as shown on the screen.

Course date	Using the calendar tool, choose the date you intend to run the course on. Note: If you plan to hold any of your courses as a half-day session, you must select the 'half day' option under the course date entry field. You must remove any unwanted sessions or add further dates where required.
Venue	The course venue details will automatically show your main administration address. You can make edits as follows: • UK address: Use the postcode search tool to populate a full address. Alternatively, enter the address manually by deleting and typing over the relevant fields. • Outside of the UK: Change the 'Country'. Manually complete all mandatory fields.
Trainer	Using the drop-down list, select the trainer to deliver the course. This list will only show the trainers approved under your company licence to deliver the selected course title.
Video Conferencing	If you have chosen to deliver your course using video conferencing software, you'll need to select 'yes' by toggling the button to the right; if you're delivering the course in a classroom, leave the button toggled to the left.
Options	To exclude your course from the IOSH website course calendar, toggle the button to the right. This will ensure it does not appear in our listings. If you would like it to show in our listings, then leave the button toggled to the left. This does not apply to training providers who have unselected this option upon licence approval / renewal.

5 Click 'Submit' to complete your course registration. When you click 'Submit', your course ID (reference number) will be generated on the top menu bar next to your organisation name.

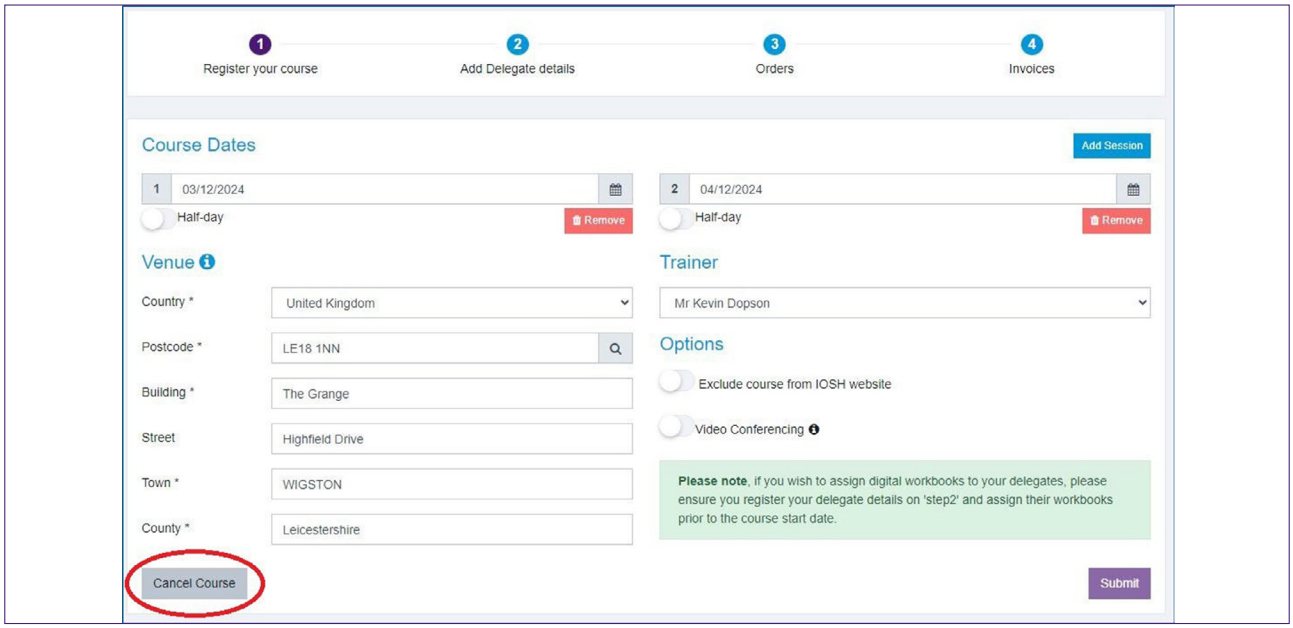
Amend or cancel courses

To amend a course, from the home screen, locate the course you wish to amend, using the search filters available.

Once in your course occurrence, you can make amends as necessary. Remember to press 'Submit' to save any amends on your course details page.

To cancel a course: locate the course you wish to cancel using the search methods. Once the course page has loaded, the option to 'Cancel course' will appear in the bottom left-hand corner.

Note: This will remove the course completely and the reference number will no longer be active.



Register face-to face course delegates

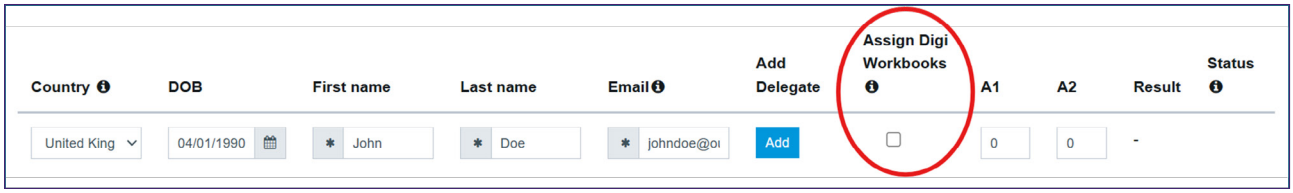
1 Select 'Add Delegates details' on the journey bar.

2 Enter details for each delegate into the fields provided. Delegate email addresses must be unique to each delegate.

3 Click 'Add' and then 'Confirm' when prompted. This will enable you to move to the next delegate entry.
Note: This entry is not final - you can edit delegate details at any time until digital workbooks are allocated, or results are submitted. See Amend or cancel delegates for more information.

4 You can also bulk import delegate data for up to 20 delegates on your face-to-face training course using a downloadable template. When bulk import you will not see the 'Add' button, only 'Update' as you will still be able to edit the delegate information until digital workbooks are allocated, or results are submitted. The downloadable template and full instructions on how to bulk import are supplied on the digital TPP on the 'Add delegate details' tab.

5 Once delegate details have been entered, you can choose to assign a digital workbook to individual delegates using the checkbox next to each delegate record. If blank, the delegate won't receive a digital workbook, and you must supply a hardcopy version.



6 As digital workbooks are assigned you will see the number of available workbooks available in your inventory decrease.

7 If digital workbooks are assigned to delegates, they will receive an automated email from our delegate digital portal, prompting them to register or log in to view the assigned workbook. This email will come from digitalsupport@iosh.com. As a training provider, you can also view the workbooks you've assigned to your delegates in your digital portal. Guidance for you and your delegates on how to use the digital portal is available in our training provider knowledge hub.

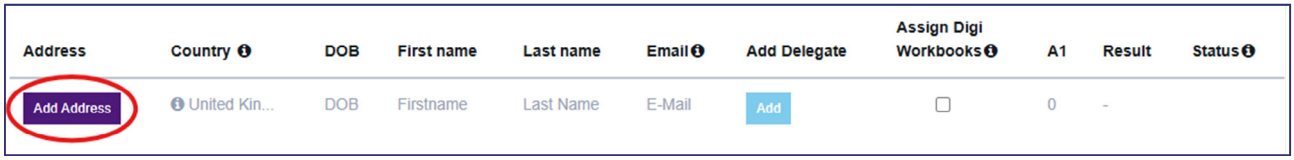
Once digital workbooks have been allocated, delegate details cannot be amended.

Register delegates for face-to-face CITB-mapped construction courses

Our CITB-mapped construction courses include Safety, Health and Environment for Construction Workers and Safety, Health and Environment for Construction Managers.

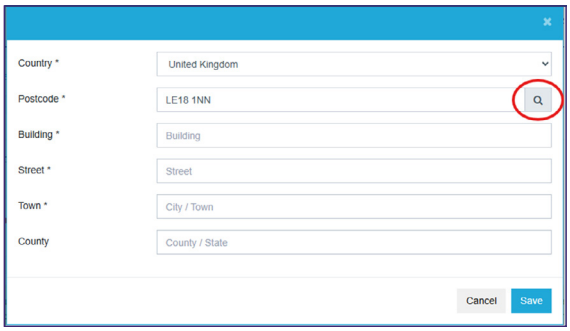
When registering delegate details for these courses, you will need to enter an address and date of birth for each delegate. This is a mandatory CSCS requirement.

1 To enter a delegate address, select 'Add Address'.



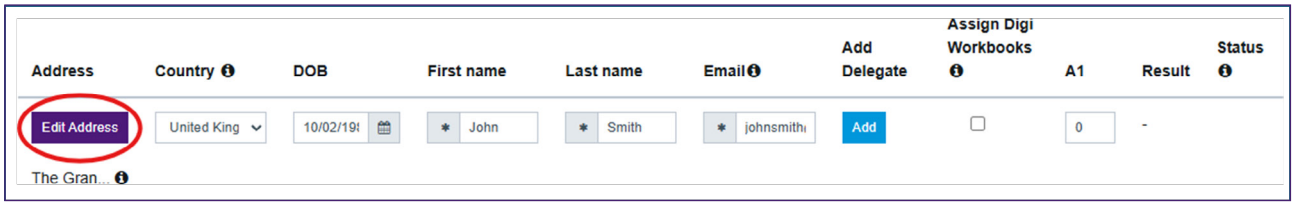
2 The address entry window will appear. Populate the fields with the delegate's address.

3 The window will open with 'United Kingdom' listed as the default country. If this is correct and the delegate has a UK address, you can enter the postcode and select the magnifying glass icon to search for the full address.
If the delegate's address is outside of the UK, select the appropriate country from the list on the address entry window and enter the mandatory address fields manually.



4 Press 'Save' once everything is entered correctly.

Once the address is added, you will be able to make edits using the 'Edit Address' button.

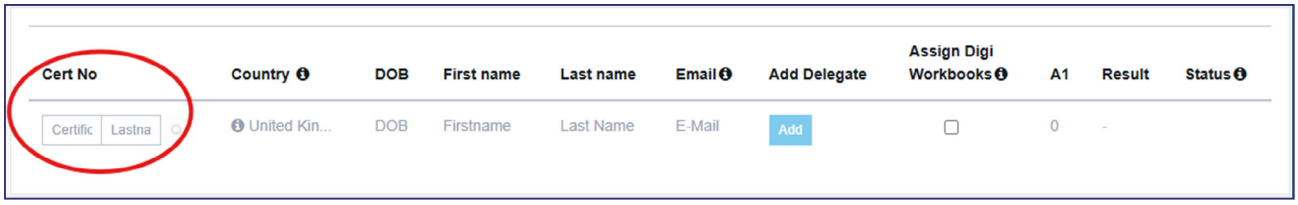


Note: you'll notice that the address appears to be cut off once entered. Hover over the information icon next to the address preview to see the full address entry.

Once you have added an address for your CITB course delegate, continue to register your delegate using the steps provided in the Register face-to-face course delegates section.

Register delegates for face-to-face IOSH Managing safely refresher courses

1 Enter the delegate surname and previous certificate number in the boxes provided and click the 'Search' button to locate the delegate.
Note: the surname and certificate number must match the previous certificate.

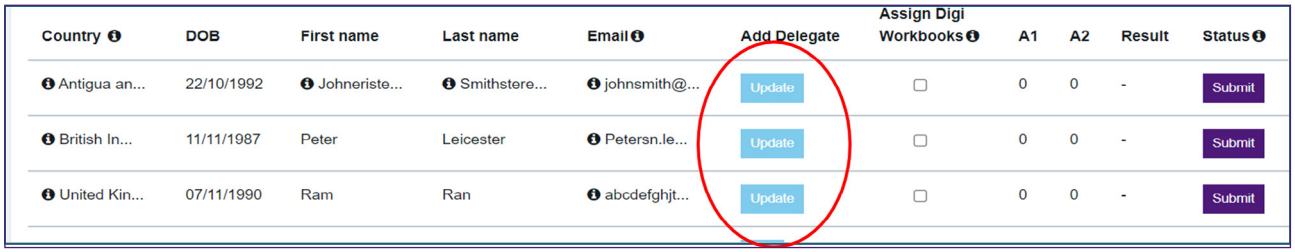


2 If the certificate number is correct, the first name and last name will be entered automatically in the fields provided. To complete your delegate registration, follow the steps in the Register face-to-face course delegates section to complete delegate registration.

Amend or cancel delegates

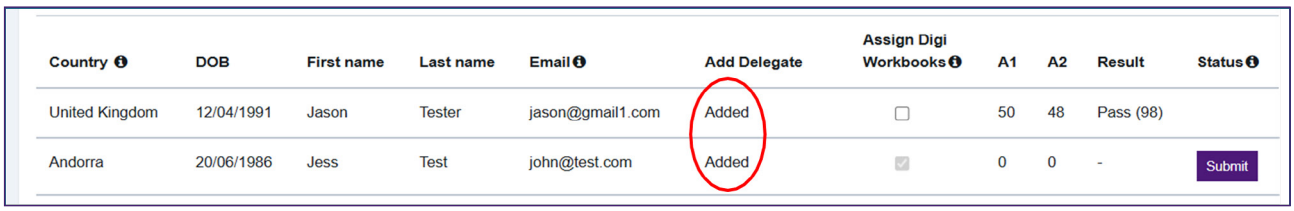
Once a delegate has been added onto a training course, their details can be changed at any time up until they are assigned a digital workbook, or, if a digital workbook is not required for that training course or delegate, up until their assessment results are submitted.

1 Once your delegate has been added for the first time, the 'Add' button will change to say 'Update' and the 'Submit' button will appear next to the results field.



2 To update a delegate's details, click the field that you would like to change then click 'Update'. A pop-up will appear asking you to press 'OK' to confirm or 'Cancel' to make further changes.

3 Once a digital workbook has been assigned or results are submitted, the delegate status will change to 'Added' and no further updates can be made.



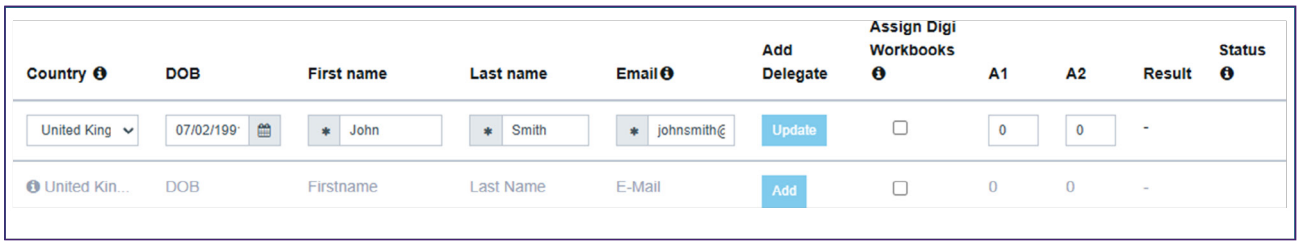
4 If you need to cancel a delegate from your course or require an amend to a delegate's details after assigning a digital workbook or submitting results, please contact us.

Submit results for face-to-face courses

Apply these steps for all face-to face course results submissions, including CITB-mapped construction courses and IOSH Managing Safely Refresher courses.

1 Navigate to ‘Add delegate details’ on the journey bar.

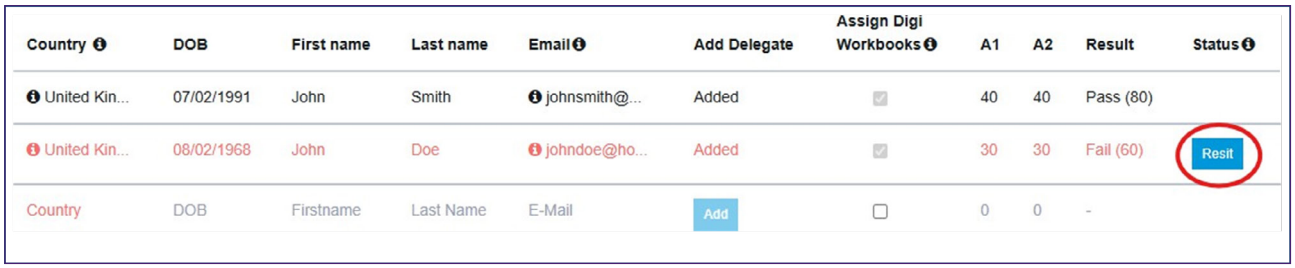
2 Check the delegate details you’ve entered and make sure all fields are accurate and complete. You can confirm any updates ahead of submitting results by making amends to the relevant fields and then clicking the ‘Update‘ button.
Enter assessment marks for each delegate and click ‘Submit’ to confirm your results. Once results are submitted, they will not be editable.
Note: If you are trying to enter results for a course with a start date that occurred more than 90 days in the past, please contact us.



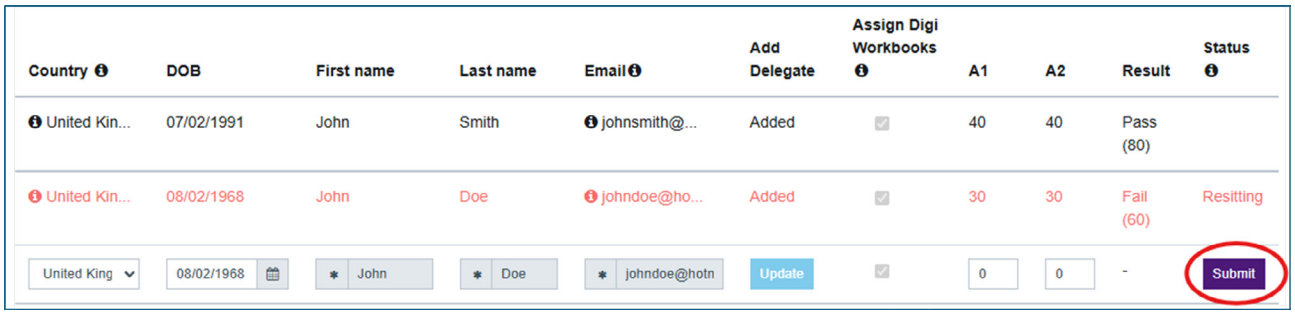
Submit resit results

Apply these steps for all face-to face course results submissions, including CITB-mapped construction courses and IOSH Managing Safely Refresher courses.

1 When a delegate has not passed their assessments, their ‘Fail’ result status will be shown against their line. After selecting ‘Submit’, a ‘Resit’ button will appear.



2 Clicking on the ‘Resit’ button will add a new results line below the delegate, into which you can then enter their new results. If they have now passed, you can select ‘Submit’ and you will be able to proceed to the ‘Orders’ section to purchase a certificate for this delegate.

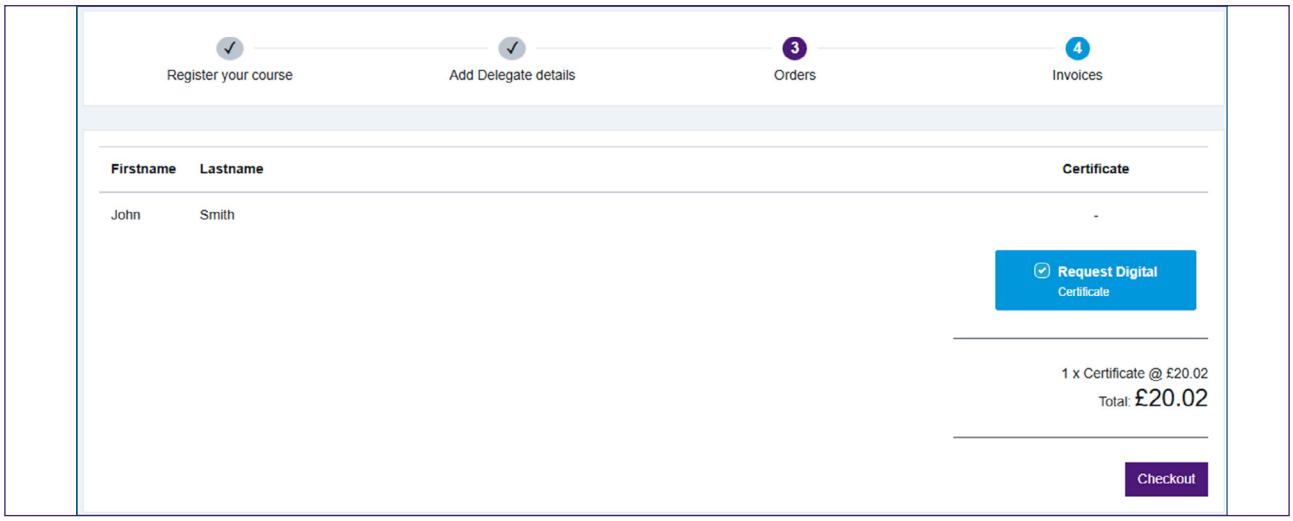


Amend or cancel results

If you need to make amends to delegate details or cancel a result entry after it’s been submitted, please contact us.

Purchase digital certificates for face-to face courses

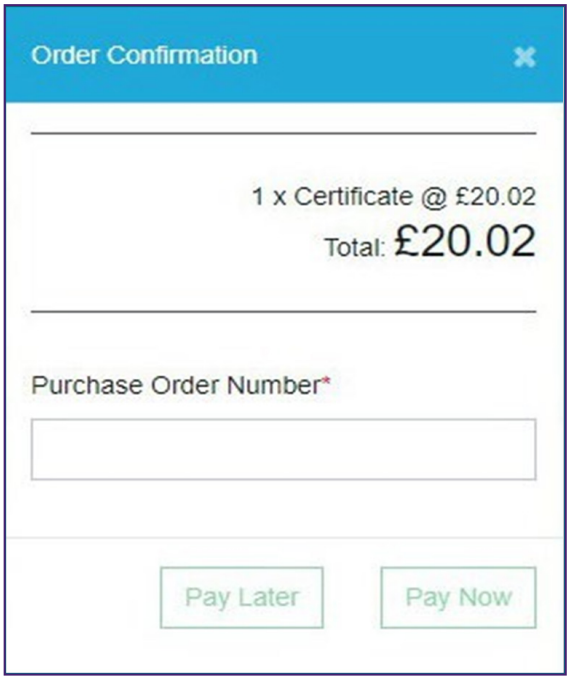
1 Once your delegate results have been submitted, click on 'Orders' in the journey bar. You will be presented with a list of all delegates that have passed your course and require a digital certificate. An additional hardcopy can be ordered later if needed.
Note: You will only be able to order certificates for delegates who have passed the course. Those who haven't will need to resit any part that they failed on.



2 Select 'Checkout' to proceed with the certificate order.

3 Once Checkout' is selected, an 'Order Confirmation' pop-up box will appear. This will show an order summary and request a purchase order number (up to 10 characters) which is a mandatory field.

4 On entering a purchase order number, the payment options are enabled.
Payment options are 'Pay Now' and 'Pay Later'.
Pay Now: available to all training providers for all orders. If you select 'Pay Now' you will be able to enter your payment details using WorldPay.
Pay Later: available only to training providers with a valid credit agreement and sufficient available credit with IOSH. Your available credit is calculated as your agreed credit limit minus your outstanding balance with IOSH. If you select 'Pay Later', an invoice will be generated automatically and emailed to your main admin contact. Payment can be made later by card on the TPP. Alternatively, you can pay via BACS, as per the details on the bottom of your invoice.



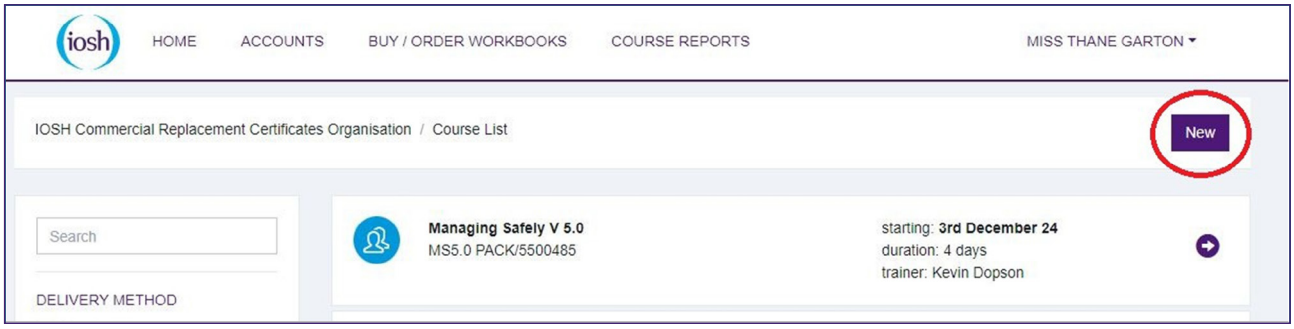
5 Once payment is complete, your digital certificates will be sent to the IOSH training provider digital portal, ready for you to release to your delegates. Guidance for you and your delegates on how to use the digital portal is available in our training provider knowledge hub.

6 After purchasing digital certificates, you will have the option to order an additional hardcopy certificate for each delegate. Refer to the 'Purchase additional hardcopy certificates' secion for more information.

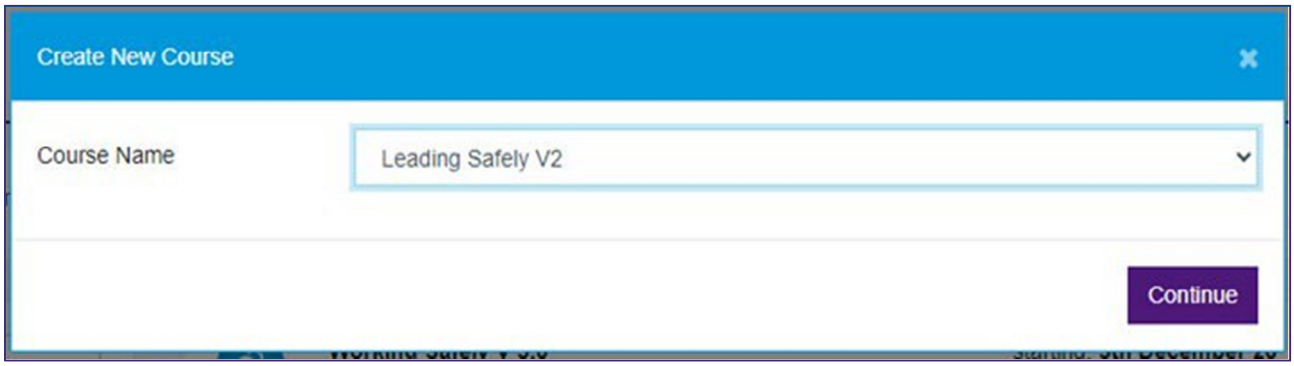
Leading Safely courses

Register Leading Safely courses

1 On your home screen select 'New'.



2 A pop-up box will appear with a 'Course Name' drop-down list. Select your Leading Safely course from the list.
Note: only courses for which you hold a current licence will appear in this list.

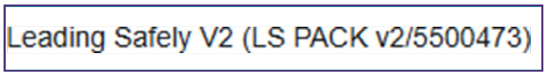


3 Register your course as per the form shown below, including the following details:

Course Date	Using the calendar tool, choose the date you intend to run the course on.
Venue	The course venue details will automatically show your main administration address. You can make edits as follows: • UK address: Use the postcode search tool to populate a full address. Alternatively, enter the address manually by deleting and typing over the relevant fields. • Outside of the UK: Change the 'Country'. Manually complete all mandatory fields.
Trainer	Using the drop-down list, select the trainer to deliver the course. This list will only show the trainers approved under your company licence to deliver the selected course title.
Video Conferencing	If you have chosen to deliver your course using video conferencing software, you'll need to select 'yes' by toggling the button to the right; if you're delivering the course in a classroom, leave the button toggled to the left.

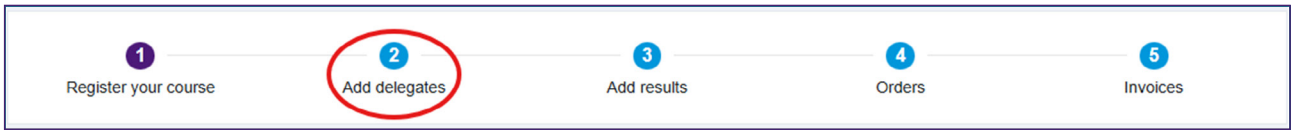
Options	To exclude your course from the IOSH website course calendar, toggle the button to the right. This will ensure it does not appear in our listings. If you would like it to show in our listings, then leave the button toggled to the left. This does not apply to training providers have de-selected this option upon licence approval / renewal.

4 Click 'Submit' to complete your course registration. When you click 'Submit', your course reference number will be generated on the top menu bar next to your organisation name.



Register Leading Safely delegates

1 To add the delegates manually select 'Add delegates' from the journey bar.



2 Once all delegates are entered, select the 'Add button.

Note: Each delegate must have a unique email address. We use this to send each delegate their confirmation of registration and access to the pre-course work. Please ensure that all delegate registrations are added at least five working days prior to the course start date. This will allow time for delegates to receive their course instructions and complete any pre-course work.

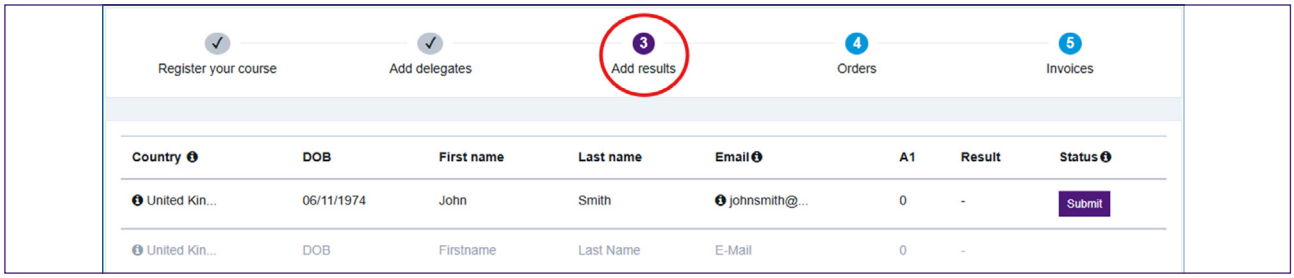
Amend or cancel Leading Safely delegates

Once a delegate has been added onto a training course, their details can be changed at any time up until their assessment results are submitted. Refer to the Amend or cancel delegates section for more information.

Submit Leading Safely delegate results

1 Navigate to 'Add results' from the journey bar.

2 Enter the results for each delegate and click 'Submit'.



Submit resit results for Leading Safely courses

You can submit Leading Safely resit results by following the steps in the submit resit results section.

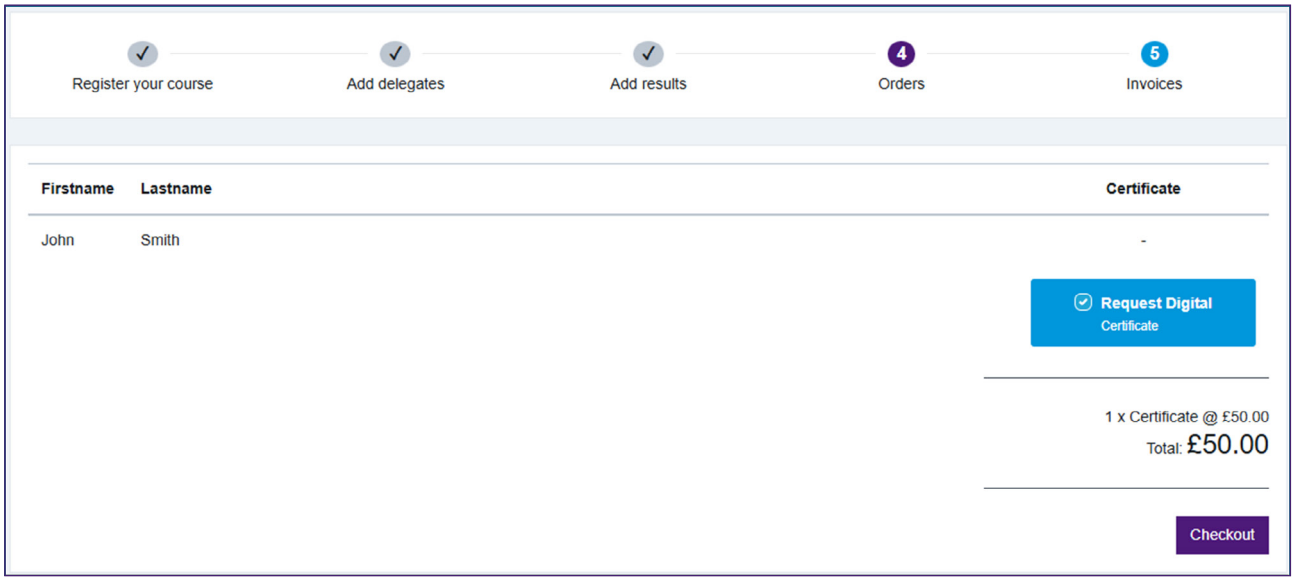
Amend or cancel results for Leading Safely courses

If you need to make amends to delegate details or cancel a result entry after it's been submitted, please contact us.

Order Leading Safely delegate certificates

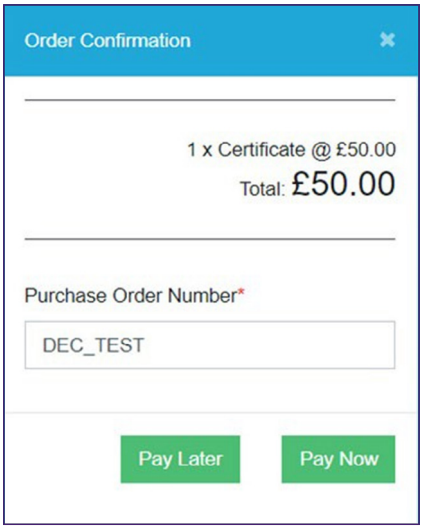
1 Once you have submitted all delegate results click through to 'Orders' using the journey bar. Your order total will have been calculated.

2 To proceed, select 'Checkout'.



3 Once 'Checkout' is selected, an 'Order Confirmation' pop-up box will appear. This will show an order summary and request a purchase order number (up to 10 characters), which is a mandatory field.

4 On entering a purchase order number, the payment options are enabled. Payment options are 'Pay Now' and 'Pay Later'.
Pay Now: available to all training providers for all orders. If you select 'Pay Now' you will be able to enter your payment details using WorldPay.
Pay Later: available only to training providers with a valid credit agreement and sufficient available credit with IOSH. Your available credit is calculated as your agreed credit limit minus your outstanding balance with IOSH. If you select 'Pay Later', an invoice will be generated automatically and emailed to your main admin contact. Payment can be made later by card on the TPP. Alternatively, you can pay via BACS, as per the details on the bottom of your invoice.



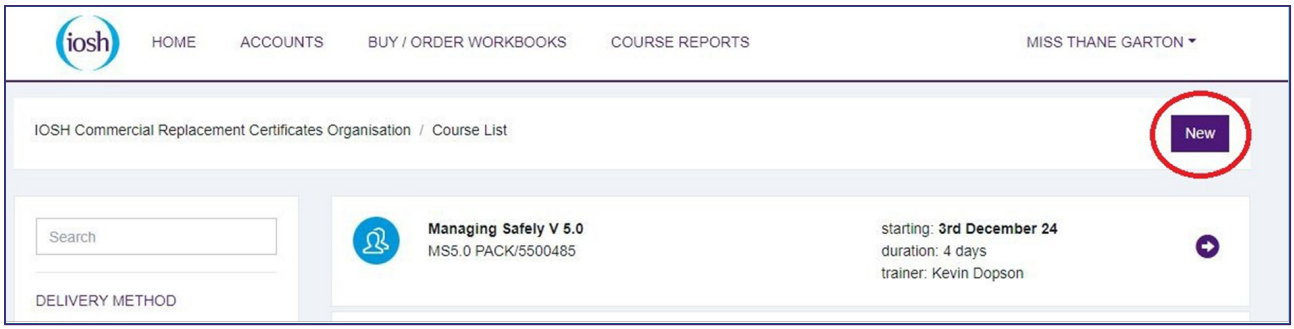
5 Once payment is complete, your digital certificates will be sent to the IOSH training provider digital portal, ready for you to release to your delegates. Guidance for you and your delegates on how to use the digital portal is available in our training provider knowledge hub.

6 After purchasing digital certificates, you will have the option to order an additional hardcopy certificate for each delegate. Refer to the 'Purchase additional hardcopy certificates' section for more information.

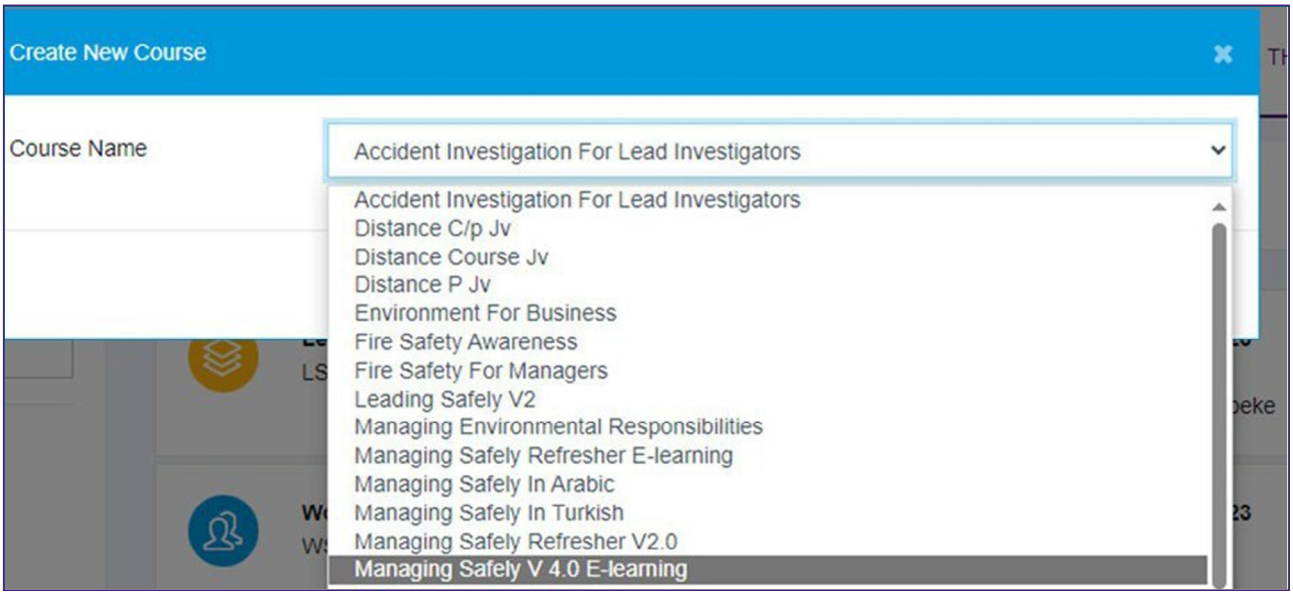
E-learning courses

Register e-learning courses and purchase digital certificates

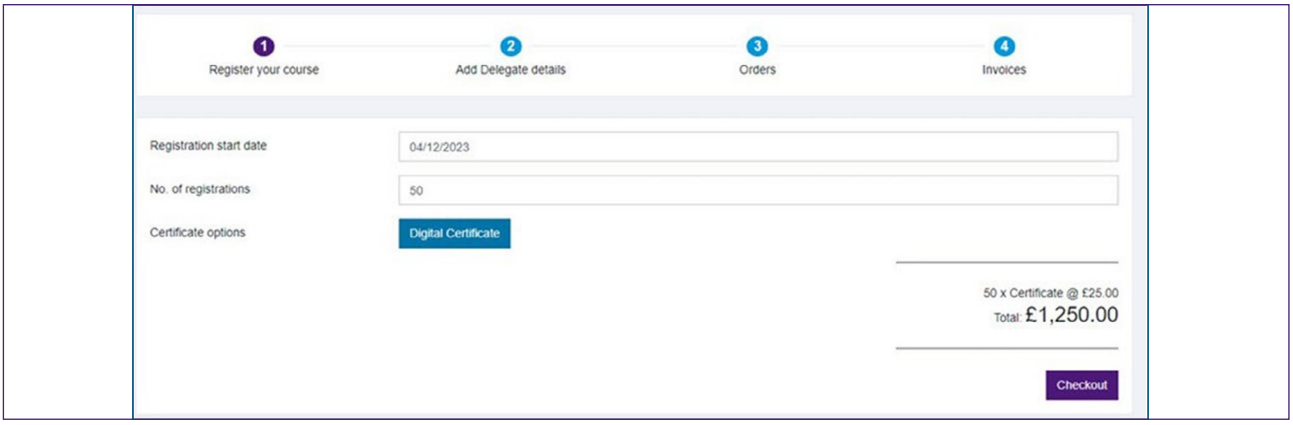
1 On your home screen select 'New'.



2 A pop-up box will appear with a 'course name' drop down list. Select the e-learning course you plan to run.
Note: only courses for which you hold a current licence will appear in this list.



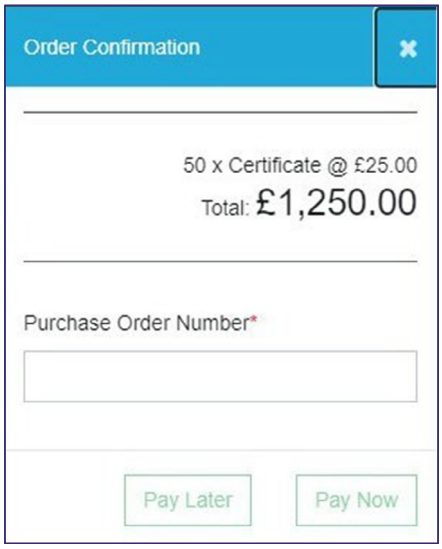
3 The course registration screen will appear. The start date will auto-populate with today's date.



4 Add the number of registrations required (max. 50). Select 'Digital certificate' in order to calculate your order total.

5 Select 'Checkout' to proceed with the order. An 'Order Confirmation' pop up box will appear.

6 This will show an order summary and request a purchase order number (up to 10 characters) which is a mandatory field. On entering a purchase order number, the payment options are enabled.
Payment options are 'Pay Now' and 'Pay Later'.
Pay Now: available to all training providers for all orders. If you select 'Pay Now' you will be able to enter your payment details using WorldPay.
Pay Later: available only to training providers with a valid credit agreement and sufficient available credit. Your available credit is calculated as your agreed credit limit minus your outstanding balance with us. If you select 'Pay Later', an invoice will be generated automatically and emailed to your main admin contact. Payment can be made later by card on the TPP. Alternatively, you can pay via BACS, as per the details on the bottom of your invoice.



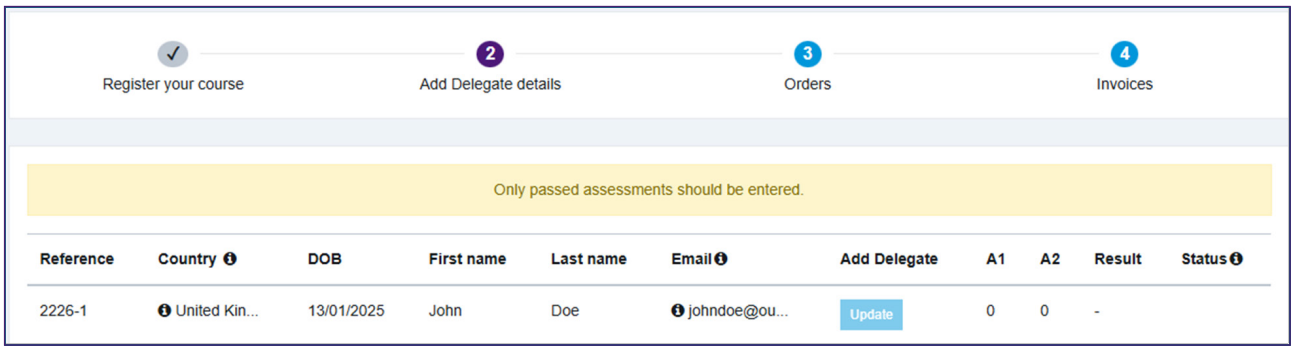
7 Once your digital certificates are pre-purchased, they will be automatically allocated once you submit delegates details and results.

Register e-learning delegates

1 Select 'Add delegate details' on the journey bar.

2 Enter each delegate's country, date of birth, first name, surname and email address, then click 'Add' to confirm the entry and move to the next line. You can edit delegate information at any point ahead of submitting assessment results. Refer to the Amend or cancel delegates for information on how to do this.

3 Once you have added your delegate's details, the 'Reference' field will automatically populate with a new ID.
Note: the 'Reference' field cannot be amended once you have selected 'Add'.



Alternatively, you can bulk import data for up to 50 delegates on your e-learning course using a downloadable template. The downloadable template, along with detailed instructions on how to bulk import are provided on the 'Add Delegate details' tab.
Note: When using the bulk import feature, you must enter delegate details and results simultaneously. It is not possible to add delegate details and results separately at a later time. You will also be unable to edit delegate details once bulk imported.

Amend or cancel e-learning delegates

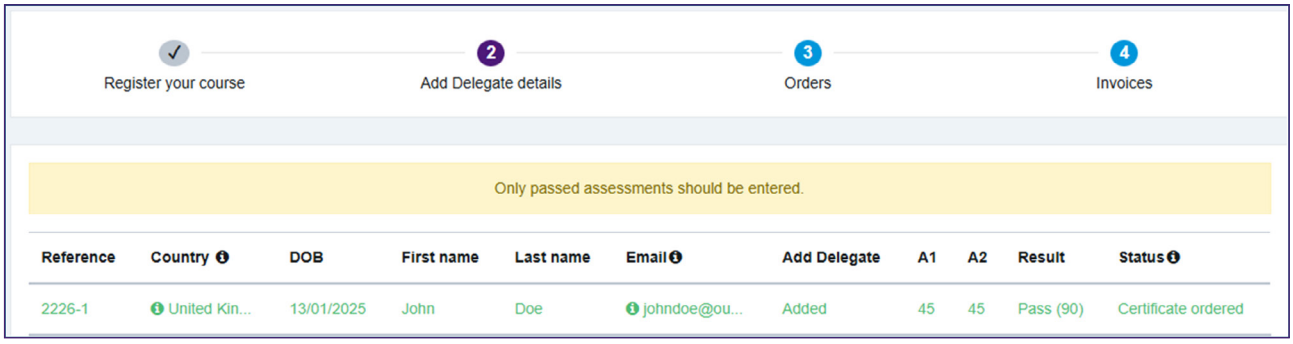
Once a delegate has been added onto a training course, their details can be changed at any time up until their assessment results are submitted. Refer to the Amend or cancel delegates section for more information.

Submit e-learning delegate results

1 From the 'Add delegate details' tab, enter all required assessment results next to each delegate entry.
Note: only results for passed assessments must be entered.

2 A 'Submit' button will appear. Select 'Submit' once you are sure the results you entered are correct.

3 Once 'Submit' is selected, the status changes to 'Certificate Ordered' - this step initiates the e-learning certificate order. Your digital certificates will be sent to the IOSH training provider digital portal, ready for you to release to your delegates. Guidance for you and your delegates on how to use the digital portal is available in our training provider knowledge hub.



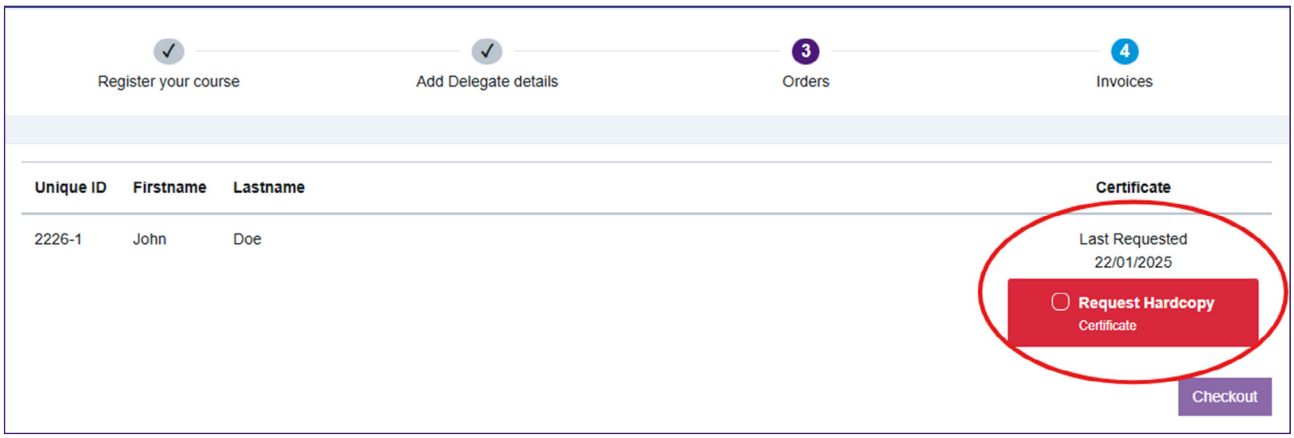
Amend or cancel results for e-learning courses

If you need to make amends to delegate details or cancel a result entry after it's been submitted, please contact us.

Purchase additional hardcopy certificates

Apply these steps to purchase additional hardcopy certificates for all courses, including face-to-face and e-learning.

1 Your delegates will be automatically issued with a digital certificate following submission of their results. If you would like to order an additional hardcopy certificate, navigate to 'Orders' on the journey bar and select 'Request Hardcopy certificate' next to the relevant delegate entry.



2 The total cost of the selected certificates will be calculated. To proceed with the order, select 'Checkout' and follow the payment steps.