



The
Primary Care
Development
Centre

COURSE BOOKING PORTAL

www.pcdcportal.org



USER GUIDE



An Introduction
to Your New
Booking Portal

March 2017

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USER GUIDE

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Getting Started

➤ How to Register

You can browse the upcoming courses list without signing in as a user, but to apply or manage course bookings you will need to be a registered user on the portal. Here's a quick guide on how to register:

1. Open your web browser and go to www.pcdportal.org then click on the 'Register' tab at the top of the screen
2. You will be directed to this screen:



The screenshot shows the 'User Registration' page of the Primary Care Development Centre portal. The page has a teal header with the logo on the left and navigation tabs: 'Upcoming Courses', 'Sign In', 'Register' (selected), and 'FAQ'. Below the header, a message states: 'All individuals working in primary, secondary, community and private healthcare and social care can register with this website by completing the form below. Registered members will be able to apply for courses, view their course history and access our resource section that contains useful information and links for Healthcare staff.'

The registration form includes the following fields and options:

- Organisation**: Text input with placeholder 'Start typing your organisation name'.
- Role**: Dropdown menu with placeholder 'Please select the option that most closely matches your role...'.
- Secondary Role**: Dropdown menu with placeholder 'Please select the option that most closely matches your secondary role...'.
- Title**: Dropdown menu with placeholder 'Please select a title...'.
- Forename**: Text input.
- Surname**: Text input.
- Email**: Text input.
- Phone**: Text input.
- Ethnicity**: Dropdown menu with placeholder 'Please select an option...'.
- Gender**: Dropdown menu with placeholder 'Please select an option...'.
- Age Group**: Dropdown menu with placeholder 'Please select an option...'.
- Password**: Text input.
- Repeat Password**: Text input.

At the bottom of the form are 'Cancel' and 'Submit' buttons. A note above the form states: 'If your organisation doesn't appear in this list please contact us. Alternatively, if you are not aligned with any individual organisations (e.g. a locum) please tick this box: ☐'. A further note says: 'Note: If you are associated with more than one organisation you can add these to your profile after you log in.'

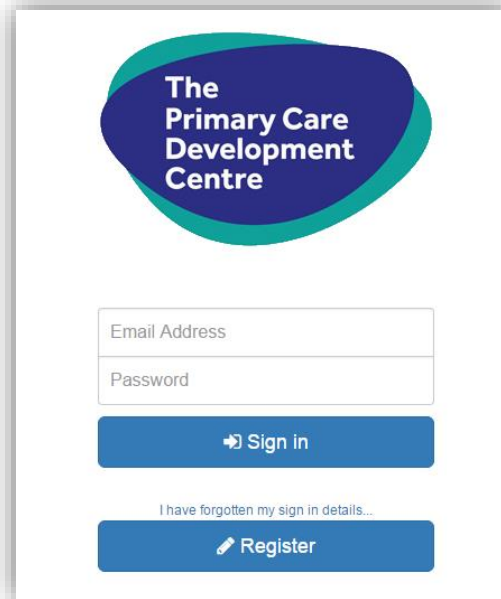
3. Complete all the fields required. All users must register with their own email address (this can be a work or personal email address.) Please note that the same email address cannot be used twice by two different users.

4. Once you have completed the form, click the  button
5. A box will open asking you to confirm your registration (if you are aligned with an organisation please read carefully and only tick the box if you have the necessary permission to register)
6. Click 
7. An email will now be sent to the email address that you registered with, please follow the link in this email in order to complete your registration.

➤ Signing in to the Portal

To sign in, select the 'Sign In' tab at the top of the screen and enter the email address and password that you registered with. (See example below.)

If you cannot remember your sign in details then click on the 'I have forgotten my sign in details' option and an email will be sent to you to enable you to reset them.



The screenshot shows the login interface for The Primary Care Development Centre. At the top is the organization's logo. Below it are two input fields: 'Email Address' and 'Password'. Under the password field is a blue 'Sign in' button with a right-pointing arrow icon. Below the sign-in button is a link that says 'I have forgotten my sign in details...'. At the bottom is a blue 'Register' button with a pencil icon.

'Upcoming Courses' Screen

Upon signing in to the portal, you will automatically land on this 'Upcoming Courses' screen.

The Primary Care Development Centre

Course Booking Portal

Upcoming Courses | Booked Courses | My Organisations | My Profile | FAQ | Sign Out

You are now logged in to the PCDC Course Booking Portal. We are a not-for-profit organisation offering training courses and programmes for those working in primary, secondary, community and private healthcare and social care.

Below, you can view our upcoming courses, apply for a course and manage course booking(s). If you are a manager, you can manage course bookings for your staff members here too.

For more information on how to use this portal, or if you have any queries, please visit the [FAQ page](#) [here](#).

A ☒ Show courses for me ☐ Show all courses for **B** [Download Course List](#)

Availability key: ☒ Open to book ☒ Already booked on ☐ On waiting list ☒ Cancelled ☐ Full (add to waiting list)

19 events available








Date	Course Name	Available To	Restrictions (hover over for detail)	Availability
27 Mar 2017	Clinical Coding v3 - SystmOne (AM) - 16-0240 Derby and Derbyshire LMC, 3rd Floor Celtic House, Heritage Gate, Friary Street, Derby, DE1 1NL	Practice Manager/ Asst Practice Manager, Admin and Reception, Business/Finance/Admin Manager	i	<input checked="" type="checkbox"/>
07 Apr 2017	Wellness & Absence Management - 17-0022 Redbrick House, Peafield Lane, Mansfield, NG20 0EW	Practice Manager/ Asst Practice Manager, Business/Finance/Admin Manager		<input checked="" type="checkbox"/>
07 Apr 2017	Workplace Investigations - 17-0024 NBV Mercury House, North Gate, New Basford, Nottingham, NG7 7FN	Practice Manager/ Asst Practice Manager, Business/Finance/Admin Manager		<input checked="" type="checkbox"/>
20 Apr 2017	Frailty Toolkit - 17-0019 Redbrick House, Peafield Lane, Mansfield, NG20 0EW	GP, Nurse, Practice Manager/ Asst Practice Manager, Other, GP Trainee, Business/Finance/Admin Manager	i	<input type="checkbox"/>
03 May 2017	Complaint Management & Whistleblowing - 17-0014 NBV Mercury House, North Gate, New Basford, Nottingham, NG7 7FN	GP, Practice Manager/ Asst Practice Manager, GP Trainee, Business/Finance/Admin Manager		<input checked="" type="checkbox"/>

C **D**

What the 'Upcoming Courses' screen tells you:

This screen shows a list of all upcoming courses, in date order.

The following chart describes the sections labelled on page 4:

Label	Description
A	The list defaults to showing courses relevant to your job role. Alternatively, you can see courses for all staff groups or for a specific staff group by using the drop down menu here.
B	The complete list of courses can be downloaded by selecting the blue  button on the right. You can print or save this list.
C	To see what booking restrictions have been placed on this course, hover your mouse over the  symbol on the screen and details will be displayed.
D	<p>This section shows the availability of the course. See key below:</p> <ul style="list-style-type: none">  (black tick) Course is available to book  (green tick) You have already booked a place on that course  (amber arrow) You have a place on the waiting list for that course  (black arrow) Course has been cancelled  (black arrow) Course is fully booked and accepting waiting list applications only

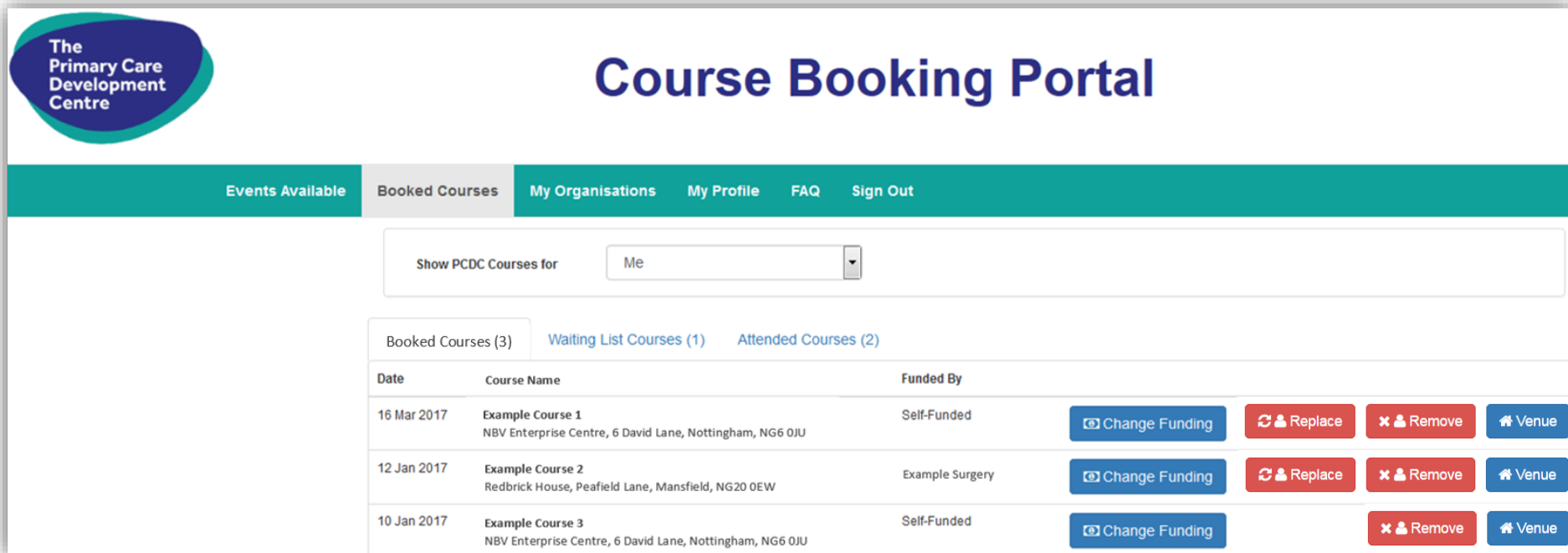
To see more details on any course, including costs, click on the course name and you will be taken to the specific course listing screen. *Details on how to apply for a course are on page 13.*

'Booked Courses' Screen

On this screen, you can view courses that you have booked a place on, have a waiting list place on, and have attended. There is a separate tab for each of these three functions:

➤ 'Booked Courses' Tab:

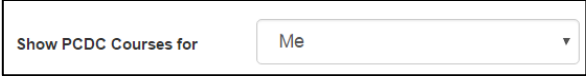




This screen shows the courses that you have booked a place on. Here's an example of this screen:



The screenshot displays the 'Course Booking Portal' interface. The top navigation bar includes 'Events Available', 'Booked Courses' (selected), 'My Organisations', 'My Profile', 'FAQ', and 'Sign Out'. Below the navigation bar, there is a dropdown menu to 'Show PCDC Courses for' set to 'Me'. The main content area shows three tabs: 'Booked Courses (3)', 'Waiting List Courses (1)', and 'Attended Courses (2)'. The 'Booked Courses' tab is active, displaying a table with the following data:

Date	Course Name	Funded By	Change Funding	Replace	Remove	Venue
16 Mar 2017	Example Course 1 NBV Enterprise Centre, 6 David Lane, Nottingham, NG6 0JU	Self-Funded	Change Funding	Replace	Remove	Venue
12 Jan 2017	Example Course 2 Redbrick House, Peafield Lane, Mansfield, NG20 0EW	Example Surgery	Change Funding	Replace	Remove	Venue
10 Jan 2017	Example Course 3 NBV Enterprise Centre, 6 David Lane, Nottingham, NG6 0JU	Self-Funded	Change Funding		Remove	Venue

What you can do on the 'Booked Courses' tab:

Icon	Description
	This screen will always default to show your courses. (If you are registered on the portal as a line manager, you can view courses that your staff members are booked on by selecting their name from this drop down menu.)
	Click this button for details on the venue (including directions). This will open as a PDF document that you can print or save.
	At the time of applying for a course place, you will have specified whether your attendance will be 'self-funded' or 'organisation funded'. If this changes (for example, you decide to fund the place yourself, rather than your organisation funding it – or vice versa) click on the blue 'Change Funding' button and select the relevant option. Remember that if you select 'organisation funded' you must seek your line manager's approval beforehand.
	If you can no longer attend but another member of staff at your organisation is taking the course place, then select the red 'Replace' button and choose the relevant staff member. <i>Please note: You can only swap to another staff member if the individual taking the place is eligible to attend and registered on the portal. You cannot swap a 'self-funded' place.</i>
	If you wish to cancel the course place, select the red 'Remove' button.

➤ 'Waiting List Courses' Tab

This screen shows any courses where you have been placed on the waiting list. See example below.

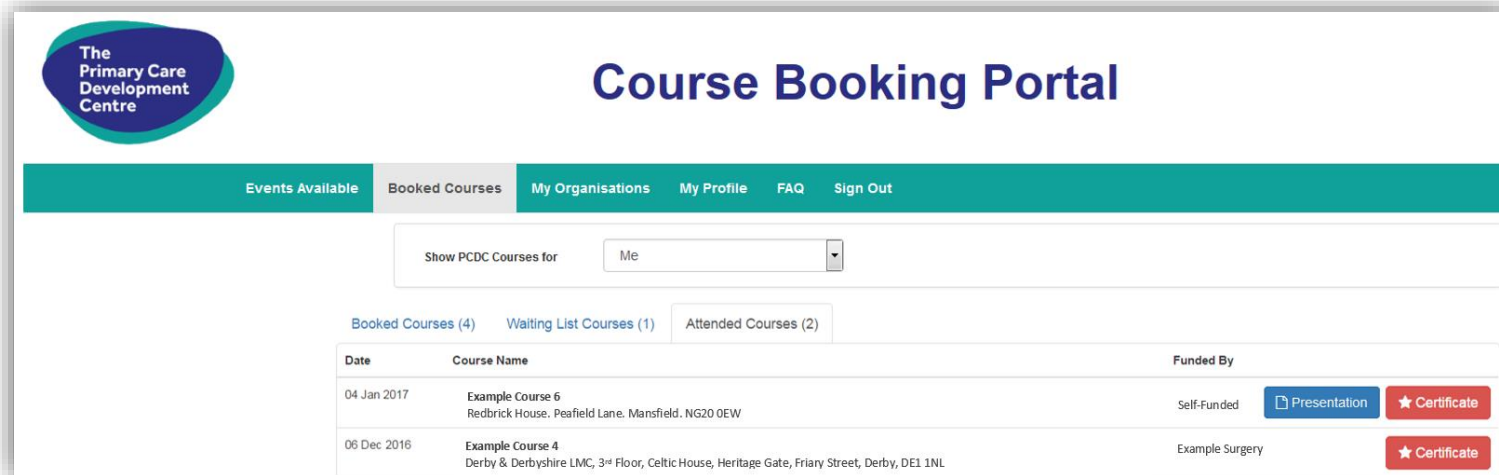
If a place becomes available for you, the **PCDC team** will contact you to see if you can take up the place. If you are placed on the waiting list and **the PCDC team do not contact you to offer you a place, then unfortunately you do not have a place on the course.** Please note that you can remove yourself from the waiting list but you can't swap your place with someone else.

What you can do on the 'Waiting List Courses' tab:

Icon	Description
	This screen will display courses that you are on the waiting list for. (If you are registered on the portal as a line manager, you can view courses that your staff members have waiting list places on by selecting their name from this drop down menu.)
	If you wish to cancel the waiting list place, select the red 'Remove' button.

➤ 'Attended Courses' Tab

Here you can see which courses you have attended. Here's an example of this screen:

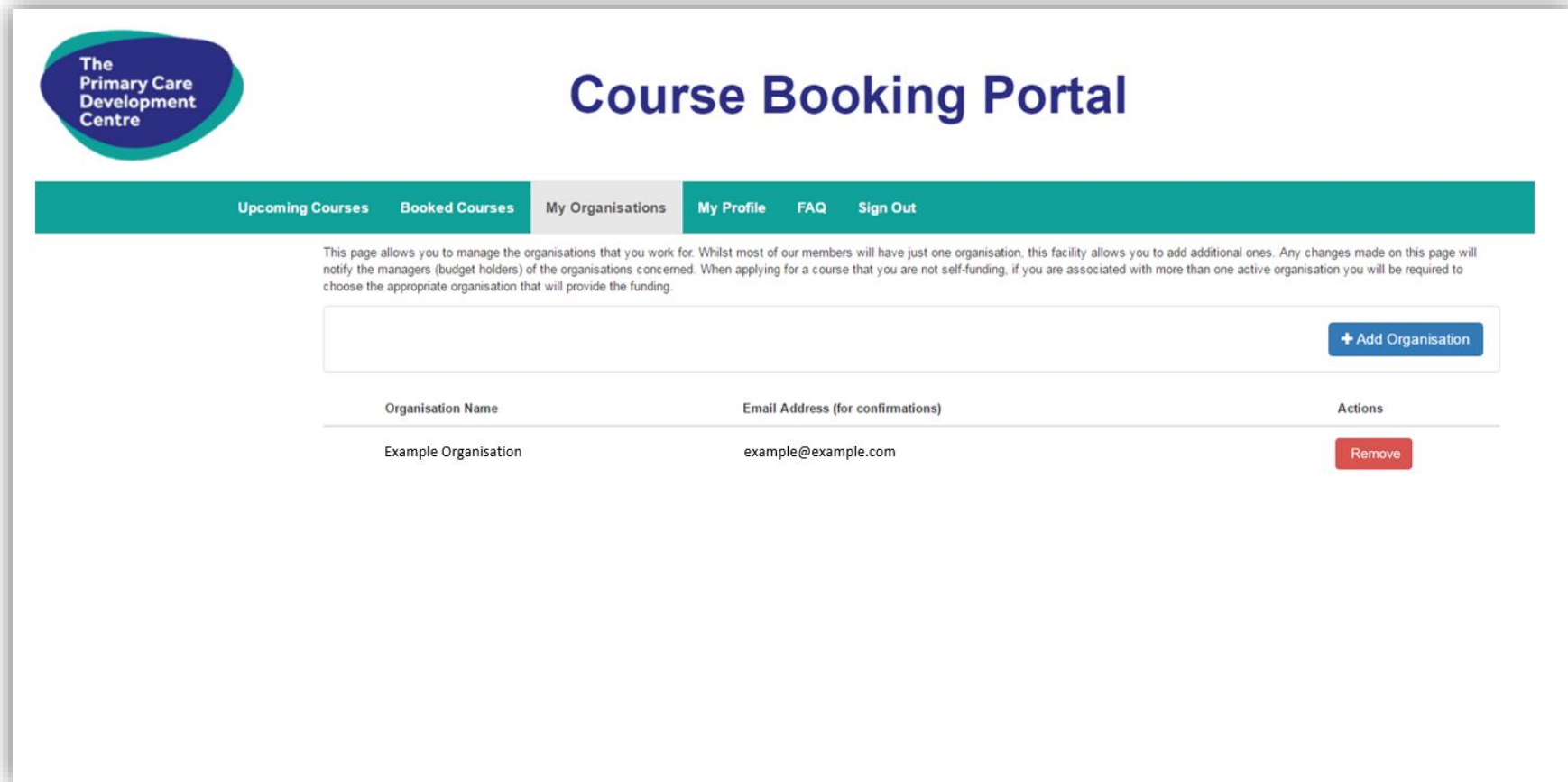


What you can do on the 'Attended Courses' tab:

Icon	Description
	Courses that you have attended will show under this tab. (If you are registered on the portal as a line manager, you can view courses that your staff members have attended by selecting their name from this drop down menu.)
	Here, you can download a copy of the attendance certificate for courses that you have attended. If there is no certificate showing for a course, you either did not attend or the PCDC have not yet uploaded the certificate (this can take approx. 1 week after the course has taken place.) The certificate will display best on a computer screen. It may work on smartphones, but this will depend on your phone model and software.
	Some Training Providers will supply copies of presentations and/or handouts that they used during the training session. Such articles will be made available here.

'My Organisations' Screen


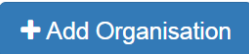
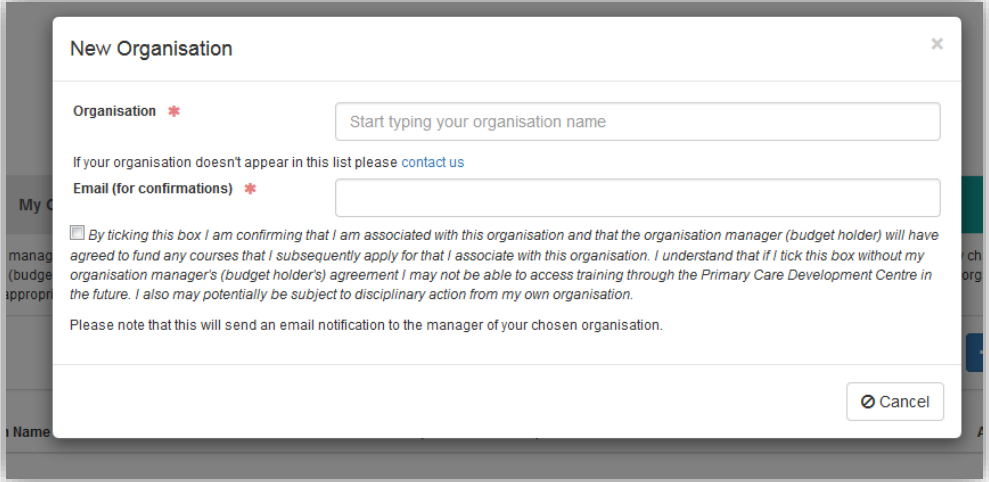
This screen displays the Organisation that you work for / are connected to. Here's an example:



The screenshot shows the 'My Organisations' screen of the Course Booking Portal. The page features a teal header with the 'The Primary Care Development Centre' logo on the left and the title 'Course Booking Portal' in the center. Below the header is a navigation bar with links: 'Upcoming Courses', 'Booked Courses', 'My Organisations' (which is highlighted), 'My Profile', 'FAQ', and 'Sign Out'. A paragraph of text explains the purpose of the page: 'This page allows you to manage the organisations that you work for. Whilst most of our members will have just one organisation, this facility allows you to add additional ones. Any changes made on this page will notify the managers (budget holders) of the organisations concerned. When applying for a course that you are not self-funding, if you are associated with more than one active organisation you will be required to choose the appropriate organisation that will provide the funding.' Below this text is a large text input field with a '+ Add Organisation' button to its right. At the bottom, there is a table with three columns: 'Organisation Name', 'Email Address (for confirmations)', and 'Actions'. The table contains one row with the values 'Example Organisation', 'example@example.com', and a 'Remove' button.

Organisation Name	Email Address (for confirmations)	Actions
Example Organisation	example@example.com	<button>Remove</button>

What you can do on the 'My Organisations' screen:

Icon	Description
	<p>If you no longer are connected to an Organisation that displays on this screen, click this button to remove it from your user profile.</p> <p><i>Please note: If you have any future course bookings (whereby your organisation had previously agreed to find your place) and would still like to keep the booking(s) but fund them yourself, you must go to your 'Booked Courses' and change the funding option to 'self-funding' BEFORE removing the organisation on this screen. If this process is not followed, your course place will belong to your Organisation (that you are no longer associated with), not yourself.</i></p>
	<p>If you wish to add an Organisation, then click this button.</p> <p>The following box will appear:</p>  <p>You will need to enter the name of the organisation that you are connected to and your email address that you use in your role at that organisation. If you work at a branch surgery, please type the name of the main practice. If you are not sure which organisation to pick, or you can't see your organisation on there, please contact the PCDC on 0115 838 6770 or send an email to info@pcdc.org.uk</p>

'My Profile' Screen

This screen will show what details you have used to register with the PCDC Course Booking Portal. Here's an example:

The Primary Care Development Centre

Course Booking Portal

Upcoming Courses Booked Courses My Organisations **My Profile** FAQ Sign Out

Username [example@example.com](#)

Title Dr

Forename Example

Surname Example

Role GP

Secondary Role

Email [example@example.com](#)

Phone 0000 0000000

Ethnicity

Gender

Age Group

[Change Password](#) [Edit Details](#)

What you can do on the 'My Profile' screen:

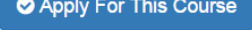
Icon	Description
Change Password	Here, you can change your password. You will need to provide your current password and new password in order to complete this.
Edit Details	If any of your details are incorrect, you can amend them here.

Applying for a Course

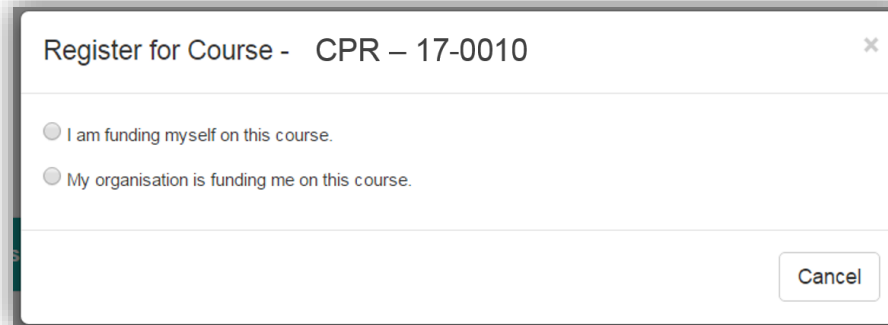
Here's a step-by-step guide on how to apply for a course via the PCDC Course Booking Portal:

1. Firstly, open the 'Upcoming Courses' screen and click on the course you are interested in applying for. A screen similar to the example below will appear. Here, you are able to find out more details about the course inc. course title, date, time, location and learning outcomes.

The screenshot displays the 'Course Booking Portal' interface. At the top left is the logo for 'The Primary Care Development Centre'. The main header 'Course Booking Portal' is centered. Below the header is a navigation bar with links: 'Upcoming Courses', 'Booked Courses', 'My Organisations', 'My Profile', 'FAQ', and 'Sign Out'. The 'Upcoming Courses' link is highlighted. Below the navigation bar, there are two buttons: '← Back To Courses' and 'Apply For This Course'. The main content area displays details for the course 'CPR - 17-0100'. The date is '17 May 2017'. A note states: 'PLEASE NOTE THERE ARE COSTS ASSOCIATED WITH THIS COURSE. SEE BELOW.' The 'Session Time' is '15:00 to 16:00 , refreshments will be provided.' The 'Venue' is 'NBV Mercury House, North Gate, New Basford, Nottingham, NG7 7FN', with a 'Venue Information' button. The 'Aimed at' section lists: 'GP Health Care Assistant, Nurse, Practice Manager/ Asst Practice Manager, Admin and Reception, Other, GP Trainee, Business/Finance/Admin Manager, Pharmacist'. The 'Restrictions' section lists: 'Region: Bassetlaw, Nottinghamshire'. The 'Overview' section states: 'This session will cover the following areas:' followed by a bulleted list: 'History of CPR', 'Infant / Child / Adult CPR', and 'Automated External Defibrillator'. The 'Special Instructions' section states: 'Maximum 2 delegates per practice, per event' and 'Free to Nottingham/City GP Alliance members, £25 to all other delegates'.

2. Upon reading the details, if you decide that you'd like to apply for a place on the course, select the blue  button in the top right hand corner of the screen.

3. A box very similar to the one below will appear. Double check the course title at the top to ensure that it's the course you wish to apply for.



Register for Course - CPR – 17-0010

☐ I am funding myself on this course.

☐ My organisation is funding me on this course.

Cancel

4. Select who will be funding the course – yourself or your organisation. If there is no course cost associated, you will still need to complete this section so that the PCDC know who has authorised your application.

- Select 'I am funding myself on this course' if you are paying for the course yourself
- Select 'My organisation is funding me on this course' if you have already obtained permission from your line manager and they will be funding your place if you are allocated one. Then, select the organisation from the drop down menu that appears and read and tick the declaration box.

5. Then click .

6. A confirmation email will now be sent to you (and your line manager if applicable) telling you the outcome of your application. If you go to the 'Booked Courses' tab on the portal, you will be able to see if you have been allocated a place on the course or have been added to the waiting list.

PLEASE NOTE: APPLYING FOR A COURSE DOES NOT GUARANTEE YOU HAVE A PLACE, PLEASE CHECK THE 'COURSES BOOKED' TAB / YOUR EMAIL INBOX TO FIND OUT THE OUTCOME OF YOUR APPLICATION.

Frequently Asked Questions

Why does the cost sometimes differ for the same course?

Firstly, we are a non-profit making organisation, so our courses vary in cost depending on venue costs and on trainer costs.

Secondly, some courses are subsidised for particular groups, for instance members of a particular CCG. Where this is the case, the course cost for individuals working within that CCG may be lower because their CCG has already contributed a certain amount of money towards their course place.

How do I pay for a course?

You can pay for a course yourself, or your organisation may pay for it (with their agreement). Just select the relevant option at the time of booking.

Invoices are sent out after the course has taken place. These can be paid via bank transfer, via credit/debit card over the phone, or by cheque.

How our Waiting List works

You will notice that some courses are funded for specific regions or CCGs, details of this will be shown in the 'Restrictions' tab in the course details. Where this is the case, priority will be given to applicants from this region or CCG. If you do not work within the specified area, you can still apply for the course and will be allocated a place on the waiting list. Six weeks prior to the course, if it is not fully subscribed, places will be allocated to applicants on this waiting list on a first come first served basis.

Cancellation Policy

If you wish to cancel a course place, this must be done at least 5 full working days prior to the course date. To cancel a place, go to the 'Booked Courses' tab, find the course you wish to cancel a place on and click the red 'Remove' button. Places cancelled less than 5 working days before the course date will still be charged, unless the PCDC team are able to reallocate your place to a waiting list applicant.

Need Help?

If you require any assistance when using the portal, the PCDC team are on hand to help. Please give us a call on 0115 8386770 or email info@pcdc.org.uk during normal office working hours and one of the team will get back to you as soon as they can. You may also notice that there is a 'FAQs' section on the portal, so you may be able to find an answer to your query there.