

**Health Education East of England** 

# Course Manager Version 2 User Guide (Delegates) Version 1.0 October 2015

Developing people for health and healthcare www.hee.nhs.uk hee.enquiries@nhs.net @NHS\_HealthEdEng

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# **Abbreviations**

Abbreviation	Explanation
GDC	General Dental Council
CPD	Continuing Professional Development
PEC	Postgraduate Education Centre

# 1 OVERVIEW

As part of their registration requirements with the General Dental Council (GDC), Dentists and Dental Care Professionals are required continually to develop themselves within their professional sphere and provide evidence of such development to their relevant professional bodies on annual basis to the GDC.

Health Education East of England (HEEoE) provides funding for courses which contribute towards Continuing Professional Development (CPD) for the Dental Team and oversees the quality and standards of dental education throughout the east of England.

To promote and achieve these requirements, HEEoE liaises with 12 Education Centres throughout the east of England. These Centres are hosted by the relevant NHS Trust in the area they are located.

The Dental Tutor together with the dental administrative staff based in the Postgraduate Education Centres (PEC) plan and deliver a programme of CPD courses for Dentists and their Team. The Centres also determine expenses and costs for delivery of courses as part of the planning process.

These course plans are submitted to HEEoE for approval. HEEoE evaluates each course plan and, if the course plan is approved, assigns funding for the delivery of the programme calendar over the year.

Events are published online at the following link:

<u>https://secure.intrepidonline.co.uk/coursemanager/eoe</u>. Delegates who wish to undertake CPD courses should refer to the relevant PEC to attend the published events.

Delegates will book onto a course via the Course Management System. They should send payment to the Centre Administrators at the earliest time possible. Upon receipt of payment, the Centre Administrator updates the delegate's booking to *confirmed*. An automatic email is sent to the delegate as a receipt of payment.

# 2 **GETTING STARTED**

# 2.1 Accessing the System

When first accessing the System you will be presented with the **CBMS login** page, where you can search for specific Course prior to logging on. The **CBMS login** screen is displayed.



From this screen you can do the following:

- Login to CBMS by entering your email and password into the fields located within the **Sign In** panel on the left-hand side, in the area outlined in red in Fig 2.1 above.
- Register for an account, in the area outlined in orange in Fig 2.1 above. For further details see section 3.
- View available Courses by clicking on the hyperlinks and searching for a Course/Conference by name or browse Events by expanding the required month, for further details see section 4.
- Reset your password, in the area outlined in green in Fig 2.1 above

When you click on **forgotten your password** you are taken to the reset password screen, as shown in Fig 2.2 below. Enter your email address and click on **Reset password**. You will be emailed a new password.

RESET PASSWORD BACK	
Please enter your email address and use the link below to reset your password. A new password will be generated and sen via email.	t to you
Email address:	
→ Reset password	
IMPORTANT NOTE REGARDING PASSWORDS	
Passwords stored in this application are encrypted and cannot be retrieved directly.	
This application will reset your password and email the newly generated password to your email account.	
Fig 2.2 Reset password screen	

# 2.2 CBMS Home Screen

When you have logged onto the system there are numerous functions that will be available to you, which will be covered in this section.

Once you have an account and logged into CBMS you will be taken to the CBMS home screen.

The CBMS Home Screen is displayed.



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At the top of the Home screen is the **Notification Bar**, in the area outlined in red in Fig 2.3 above. This displays the currently logged in user on the left and number of unread messages on the right.

On the left hand side are the menu items. These direct you to the various pages within the system. As you click on an option from the left hand menu, the menu on the left may change to reflect additional sub-menu items within. To direct back to the original menu, click either 'cancel', 'back' or 'Home'.

From the Home Screen you can perform the following actions:

- View available Courses by clicking on the hyperlinks and searching for a Course by name or browse Courses by expanding the required month.
- Access your **Personal** account information by selecting the relevant sub-category from the left-hand menu.

# **3 REGISTER FOR A DELEGATE ACCOUNT**

If you need to create an account, from the CBMS login page select **register here** as shown in Fig 2.1, in the area outlined in orange.

#### The **Register** screen is displayed.

😚 intrepid : co	ourse booking i	management s	ystem	Health Education Fast of English
<u>0</u>	REGISTER			SLIBMIT 💿
9 -			our personal details below and dick SUB a email. You should provide a secure an	
ENERAL	If you have an Intrepid a linking of the two accounts		e email address which you use to login	to Intrepid. This will allow future
lome ourses ackages revious Page	* Mandatory fields are Email address: Confirm email address: Password:	shown in bold		
SIGN IN	Confirm password: Are you a Clinician?:	Yes 🖱 No	•	
Email address:	Job title:			
Password:	Title: Surnanie: Forenames:		Address type: Address 1: Address 2:	
Forgotten your password?	Known as (forename): Sex:		Address 3: Post town: County:	
<ul> <li>Register here</li> <li>Unauthorised access to this system is strictly</li> </ul>	Date of birth (dd/mm/yyyy): Telephone:		Post code:	SEARCH

Fig 3.1 Register screen

The first section of the screen is where you can set up your account credentials. Enter and confirm your **Email** address and **Password**.

The rest of the register screen is for you to enter personal details and any specific requirements that you may have, as shown in Fig 3.2 below.

Address type:        Address 1:        Address 2:        Address 3:        Post town:        County:        Post code:     SEARCH
▼ Registration type: ▼ Registration number: (If you are a trainee please enter N/A)

Please confirm you agree to the Terms of Registration by ticking this box Terms and Conditions

#### Fig 3.2 Continuation - register screen

Complete the details as follows:

#### New delegate accounts

Select <u>Yes only</u> to **Are you a Clinician**, whether you are a clinician or not because due to the settings on the system if you select no you will not be able to select the correct delegate type and consequently not be able to view any courses on the system.

#### Delegate type

There is only one delegate type to be selected which is 'Dental'. Please ensure you select the 'Dental' delegate type which will enable you to view all available courses in the east of England.

### Existing delegate accounts

Please note that **Are you a Clinician** and **Delegate type** have been pre-set on all existing delegate accounts and cannot be and must not be changed.

Enter your personal details and any relevant details with regards to **Dietary requirements** and **Personal biography.** 

Select and read the **Terms and Conditions** and if in agreement click in the tick-box alongside.

Once all details have been completed scroll to the top of the screen and click on **Submit**, in the area outlined in red in Fig 3.1 above. This will then create your delegate account.

Please keep a note of your password which is case sensitive but this can be reset using the **Forgotten your password** link, see Fig 2.2 in section 6 for more details

## The Registration Successful screen is displayed.



Please be aware that receipt times are beyond this system's control and receipt of the registration email may take longer than anticipated.

## Fig 3.3 Registration successful

Your account has now been set up and you will receive an email confirmation.

# 4 SEARCHING FOR COURSES

Courses are grouped by category for ease of searching or alternatively an instance of a Course, can be viewed by month. All Courses can be viewed in a list format by clicking on 'Courses'. These pages contain options at the top of the page allowing filtering of the lists to show specific Courses based on their location or content.

Note, you can search for a course when you are **not** Signed In.

# 4.1 Courses

There are two ways in which you can search for a Course, from the left-hand menu and from the home screen.

From the General menu on the left-hand side select Courses.

#### The **Course** search screen is displayed.

SEARCH	ВАСК
	yed in the list below. Browse the full list, search for a course or conference by ourses or conferences which are of interest to you.
Course/Conference: Category: Delegate type:	Grade: Band: Location:
	Course (Courformers have
SEARCH RESULTS Course/Conference Acute Simulation Day	Course/Conference typ GOR: F1 Mandatory
Course/Conference	
Course/Conference	
Course/Conference Acute Simulation Day Advanced Life Support	
Course/Conference Acute Simulation Day Advanced Life Support AHP TEST	
Course/Conference Acute Simulation Day Advanced Life Support AHP TEST ALEX TEST	
Course/Conference Acute Simulation Day Advanced Life Support AHP TEST ALEX TEST ALEX TEST Anaesthesia Test Conference	GOR: F1 Mandatory

Fig 4.1 Course search screen

From this screen you can do the following:

- Use the search criteria to narrow the results
- Within the search results view a list of the Courses available to you
- View a specific Course by clicking on the name on doing so the **Course** screen will be displayed as shown in Fig 4.2 below.

#### The **Course** details screen is displayed.



#### Fig 4.2 Course details screen

This screen has all the information that you will need to know about the Course including the Course **Programme, Information**, Aims and Learning outcomes. Once clicked on these will download in a PDF format.

The following information is visable in the Course details section:

- The Aims for the course
- The Learning outcomes for the course
- Course Speaker
- CPD hours

For other information for a Course click on each tab in-turn to see the following:

- Requirements
- Target Audience as to who this course is designed for
- Any **Documents** associated to the course

# **5 BOOKING ON A COURSE**

Follow the steps in section 4 and locate the specific course that you want to book onto.

From the **Course Details** screen click on the **Book Now** Tab. **Book Now** tab screen is displayed.

EVENT DETAILS		0
CPD: 6 hour(s)		
DATE(S) TARGET AUDIENCE REQUIREMENTS DOCUMENTS	BOOK NOW	
EVENT COSTS		
Standard Event Fee(s) Dental Nurse	£20.00	
Hygienists	£40.00	
Total CALCULATE	£0.00	
How did you hear about this Course/Conference?		
By ticking this box, I agree to provide all Requirements and accept the Terms & Conditions and the Cancellation & Refund Policy.		
	Book	

### Fig 5.1 Book now screen

Complete the details as follows:

- Click in the tick-box for the appropriate course fees.
- Select **Accommodation** and **Subsistence** if available along with any **Other** items such as, literature for event or permit parking.
- You can **Calculate** the Total cost of the course.
- Select from the drop-down as to how did you hear about this course.
- Confirm that you agree to the **terms & conditions** along with **cancellation & refund policy by select the tick-box alongside.**

• Click 'Book'

A booking confirmation message will then appear as per Fig 5.2 below:



## 5.1 Multi-Person Bookings

There is also the ability to book multiple other delegates on to an event. There is some setup needed by Hicom initially and then your PEC administrator. To enable this function, your administrator will need to set you up as a 'representative' of the other delegates within their 'person' record.

Once this is done, on the booking screen you will now see a drop down to allow you to book those other delegates on to an event. You can then select multiple delegates to book on to the event the same as in the above section.

DATE(	(S)	TARGET AUDIENCE	REQUIREMENTS	DOCUMENTS	BOOK NOW	
EVENT COSTS						
Delegates:	Me (Ale	ex Drage), Chloe Isherwoo	od	• <b>0</b>		
Me (Alex Drage)						
Standard Event F All delegates	ee(s)				£123.00	<b>&gt;</b>
Chloe Isherwood						
Standard Event F All delegates	ee(s)				£123.00	<b>&gt;</b>
Total		CALCULATE				
How did you hear a	about this	Course/Conference?		V		
		ree to provide all Require & Refund Policy.	ments and accept the	Terms & Conditions		
					Book	

Fig 5.2 Multi-book now screen

**Note,** if the other delegates do not have a fee and delegate type associated with the event then they will have a message saying that they cannot be booked on.

# 6 ADMINISTRATION OF DELEGATE ACCOUNT

From the CBMS Home screen under the **Personal** left-hand menu you will see a list of options available to you, which will enable you to manage your account and bookings.

## 6.1 My Account

This is where you can change your email address and password.

#### **Changing your Email Address**

From the **Personal** menu on the left-hand side select **My Account**.

The Account Credentials screen is displayed.

ACCOUNT CREDENTIALS		BACK	
To change your email address or password, please click on the respective link below.			
Email address:	🔿 Change Email Addre	SS	
Password:	➡ Change Password		
Fig 6.1 Account credentials			

To change or amend your Email address, click on the link Change Email Address.

#### The Change Email Address screen is displayed.

U	1 2
CHANGE EMAIL ADDRESS	SAVE 🧿
Please note that we will comr check regularly.	municate with you via email. You should provide a secure and <b>individual</b> email address which you
Current email address:	Delegate@example.com
New email address:	
Confirm email address:	

Fig 6.2 Change email address screen

Complete the details as follows:

- Enter and Confirm your email address
- Click on Save.
- A pop-up will display advising that your email address has been changed successfully, click on ok.
- You are returned to the **Account Credentials** screen.

### Changing your Password

From the **Personal** menu on the left-hand side select **My Account**.

The Account Credentials screen is displayed.



Fig 6.3 Account credentials

To change or amend your Password, click on the link Change Password.

#### The Change **Password** screen is displayed.

CHANGE PASSWORD		SAVE 🧿
Your password must be at leas Please note that passwords are	six characters and contain at least one number. case sensitive.	
Current password:		
New password:		
Confirm password:		

Fig 6.4 Change password screen

Complete the details as follows:

- Enter your Current password, New password and then Confirm
- Click on Save
- A pop-up will display advising that your password has been changed successfully, click on **OK**.
- You are return to the Account Credentials screen.

# 6.2 My Personal Details

This is where you can make amendments to your personal details.

From the **Personal** menu on the left-hand side select **My Personal Details**.

The <b>Persona</b> l	Details scre	en is displave	ed.

PERSONAL DETAILS			
Please update your p	ersonal details using the form below.		
* Mandatory fields are shown in bold			
Are you a Clinician? Delegate type: Job title:	: ✓ Dental DENTIST		i Save & Back
Title: Surname: Forenames: Known as (forename): Sex: Date of birth (dd/mm/yyyy): Telephone:	Miss  XXXXXX  XXXXXXX  XXXXXXX  Female  01223 123123	Address type: Address 1: Address 2: Address 3: Post town: County: Post code:	Work Health Education East of Englan 2-4 Victoria House Capital Park Fulbourn Cambridgeshire CB21 5XB SEARCH
Specialty: Performer number:		Registration type: <b>Registration</b> <b>number:</b> (If you are a trainee	GDC  367903 please enter N/A)
Dietary requirements:			* *
Personal biography:			A

Fig 6.5 Personal details screen

From this screen you can make changes to your **name**, **job title**, **address**, **specialty**, **dietary requirements** and **personal biography**.

To return to the Home screen without making any changes click on **Cancel** and if changes have been made then click on **Save & Back**.

You are returned to the CBMS Home screen.

Note, you cannot change your delegate type.

## 6.3 My Courses

This section contains a list of your courses or events that you have ever booked on.

From the Personal menu on the left-hand side select My Courses.

The Courses/Conferences screen is displayed.

SEARCH		васк 🧕
statuses from the list below.	y name/date or filter your bookings/attendance by clicking on the di her details of any necessary payment, documents etc you need to p f these requirements.	-
<ul> <li>Pending Bookings (0)</li> <li>Confirmed Bookings (1)</li> <li>Waiting list (0)</li> <li>Interested in Attending (0)</li> <li>Events Attended (1)</li> <li>Cancelled Bookings (4)</li> <li>Expired Bookings (2)</li> <li>Provisional Bookings (0)</li> <li>Invited (0)</li> <li>Reserved (0)</li> </ul>	Course/Conference:	Search

Fig 6.6 Your courses/conferences screen

The first section of this screen allows you to see an overview of your bookings in the area outlined in red in Fig 6.6 above and search for a specific booking using the search criteria. The rest of the screen will display a list of your current bookings as shown in Fig 6.7 below.

SEARCH RESULTS	
TRAUMA RESPONSE (26 MAY 15 - 28 MAY 15)	VENUE(S)
Booking reference: 3302	
Booking status: Expired	
Booking date: 21 May 15	
Online booking: 🗹	
▼ DOCUMENTS	PROGRAMME
TRAUMA RESPONSE (26 MAY 15 - 28 MAY 15)	VENUE(S)
Booking reference: 3301	Event fee (£): 100.00
Booking status: Cancelled	Total cost (£): 194.00
Booking date: 21 May 15	Cancelled date:
Paid: *	
Paid date:	
Online booking: 🖌	
Refund/Transfer: *	
Refund/Transfer date:	
Refund/Transfer amount:	
ACCOMMODATION	PROGRAMME
ADDITIONAL OPTIONS	
REQUIREMENTS	
✓ DOCUMENTS	

## Fig 6.7 Your bookings

From this screen you can do the following:

- See an overview of the course along with all other available options such as, accommodation, requirement and documents associated with the course.
- Click on **Programme**, on doing so it will download a PDF document with the course itinerary.
- Click on **Venue** to see details of where the course is being held.

×

## 6.4 My Requirements

The Course Manager System allows Centre administrators to record pre-courseattendance requirements for all delegates. When completing the booking process, delegates are presented with the requirement(s) which must be provided before they are able to attend.

This section will show you what Requirements are outstanding and which items need to be provided before you are able to attend.

### The Requirements screen is displayed.

SEARCH	. ,		васк 🧕
Please make sure you have	e fulfilled all the requirements to confirm your place on t	he events.	
Course/Conference: Booking status:	Pending, Expired, Provisional 🔻		Search
SEARCH RESULTS			
	May 15 - 28 May 15) - Expired king is subject to fulfilment of the following event requir	ement(s).	
Requirement		Received	Due date
Must be a trainee in East Midlands (not LAS)		×	22/05/2015
Educational Superv		×	
Personal supporting	) evidence required	×	
Trauma Response (20 I	May 15 - 21 May 15) - Expired		
Confirmation of your boo	king is subject to fulfilment of the following event requir	ement(s).	
Requirement Educational Superv	sor Approval form	Received	Due date

Personal supporting evidence required
Fig 6.8 Requirements screen

From this screen you can do the following:

- Use the search criteria to narrow results
- See the specific details of the Requirements, the due date and if it has been received by the administrator

**Note**, you cannot submit Requirements to the administrator via CBMS this will need to be done via other means.

# 6.5 My Course Evaluations

After you have attended and paid for a course you will receive an Evaluation for the Course for you to complete and it will be displayed within the My Course Evaluations section.

From the **Personal** menu on the left-hand side select **My Evaluations**.

The **Evaluations** screen is displayed.

EARCH			васк 🤇
ame: ate sent: ubmitted: No	Search		
EARCH RESULTS		_	_
Name	Date sent	Due date	Completed o
Test Evaluation	24/07/2015	24/07/2015	

Fig 6.9 My evaluations

From this screen you can do the following:

- Use the search criteria to narrow results
- See your Evaluations that are yet to be submitted
- View and complete outstanding Evaluations

To view and complete a specific Evaluation, click on the arrow-icon alongside.

The **Evaluation** screen is displayed.

васк 🔇
٩ 📢

Fig 6.10 Evaluation screen

Once you have completed the Evaluation click on **Submit**. You are returned to the **Evaluations** screen.

## 6.6 My CPD Calculator

This section shows total of hours you have accumulated. Each course will have CPD hours and will build up as you do more.

#### From the **Personal** menu on the left-hand side select **My CPD Calculator**. The **CPD Calculator** screen is displayed.

SEARCH	васк 🔇
Use the calculator to check how many CPD hours and CPD points you have attained.	
Date from:	Search
CPD HOURS	
No results found	
CPD POINTS	

No results found

Fig 6.11 CPD calculator screen

From this screen you can do the following:

- Us the search crtiria to narrow results
- See all your accumulated CPD Hours

## 6.7 My Certificates

This section is where you can view any certificate(s) that have been issued to you after attending an course and once you have completed the evaluation for the course.

#### From the **Personal** menu on the left-hand side, select **My Certificates**.

The <b>Certificates</b> screen is displayed. SEARCH	васк 🧭
All of your certificates are listed below. Simply click on the i	con to view the certificate as a PDF and then either save it or print it.
Course:	Search
SEARCH RESULTS	
Course/Conference	
Trauma Response (26 May 15 - 28 May 15)	CERTIFICATE

# Fig 6.12 My certificates screen

From this screen you can do the following:

- Use the search criteria to narrow results
- See all Certificates that have been issued to you
- Select and view a specific Certificate
- To select and view a specific certificate, click **Certificate** alongside the relevant one within the Search Results.

# 7 OTHER FEATURES

About Us | Contact Us | Feedback | FAQs | Terms & Conditions | Cancellation & Refund Policy | Data Protection

**About Us**: This info is administrated by the administrators and just provides info about Health Education East of England.

Contact Us: Details of administrators and how to contact them.

FAQs: Frequently asked questions with answers as to what to do if...

Terms & Conditions: Terms & Conditions of use of the application.

**Cancellation & Refund Policy**: How to request a refund if you have paid for a course or event and then cannot make it.

Data Protection: How any data that is input in to the system is protected.