

Training provider portal guide

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Introduction

The training provider portal (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.

Note: this user guide has been written for desktop access to the 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.

training@iosh.com

+44 (0)116 350 0900

Opening hours

09:00-17:00 (UK time)

Monday-Friday

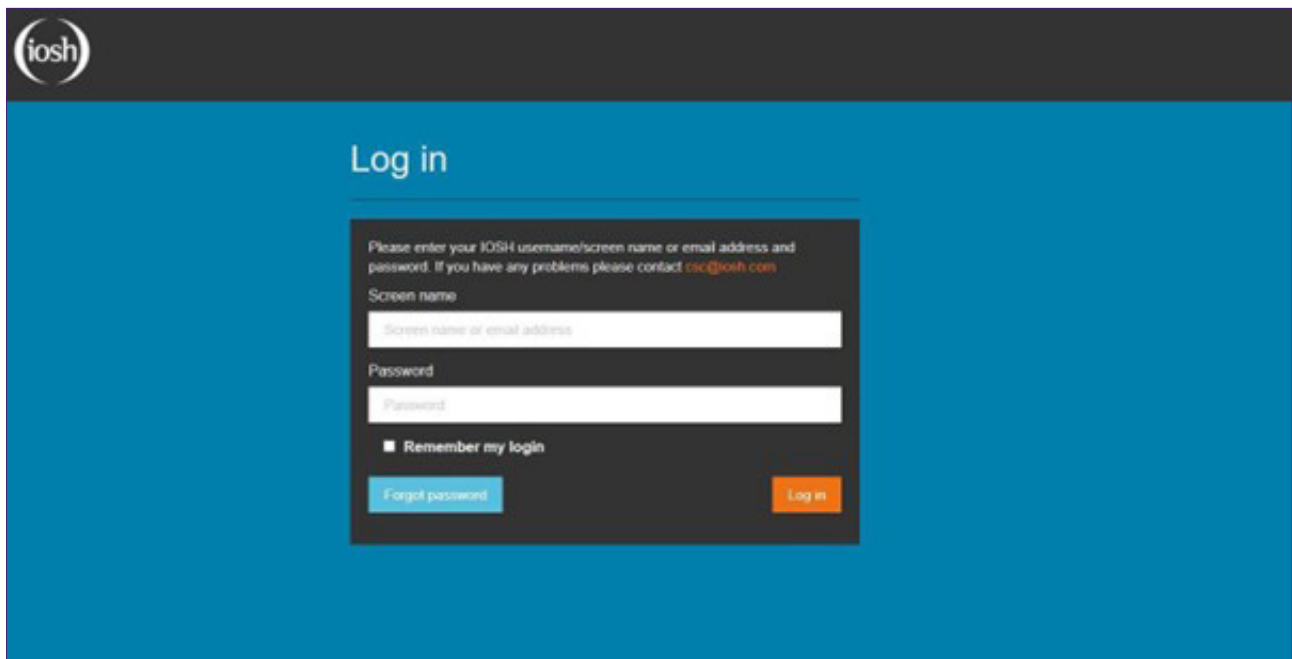
Register and log in

To log into the 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 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 TPP here: <https://trainingproviderportal.iosh.com>.

We recommend bookmarking this link for easy access.

The image shows a screenshot of the IOSH 'Log in' page. At the top left is the IOSH logo. The page has a blue background. In the center, there is a dark grey login box. Inside the box, the text reads: 'Please enter your IOSH username/screen name or email address and password. If you have any problems please contact csd@iosh.com'. Below this is a label 'Screen name' followed by a text input field with the placeholder 'Screen name or email address'. Underneath is a label 'Password' followed by a password input field with the placeholder 'Password'. Below the password field is a checkbox labeled 'Remember my login'. At the bottom of the box are two buttons: a blue 'Forgot password' button on the left and an orange 'Log in' button on the right.

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 TPP, you will see your home screen.

IOSH Commercial Replacement Certificates Organisation / Course List

Search

DELIVERY METHOD

- ☒ Face To Face
- ☒ E-Learning
- ☒ Distance
- ☒ Blended

CERTIFICATION TYPE

- ☒ Certificate
- ☒ Passport
- ☒ Both

STATUS

Active

	Managing Safely V 4.0 E-learning MS4.0 E-L/5500502 TEST 50 spaces available	open: 14th February 25	+
	Managing Safely Refresher V2.0 MSREF PACK v2/5500500	starting: 6th February 25 duration: 1 day trainer: Tom Van Heuvelbeke	+
	Managing Safely V 5.0 MS5.0 PACK/5500493	starting: 6th February 25 duration: 4 days trainer: Kevin Dopson	+
	Managing Safely V 5.0 MS5.0 PACK/5500491	starting: 6th February 25 duration: 4 days trainer: Kevin Dopson	+
	Managing Safely Refresher V2.0	starting: 13th November 24	+

The top menu contains the following tabs:

- Home - clicking this while on any page in the training provider portal 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 [Download Reports](#) section for more information.
- Support: find full guidance on how to get the most out of the 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.

IOSH Commercial Replacement Certificates Organisation / Course List

MISS THANE GARTON

- Training Provider Profile
- Change Training Provider
- Logout

- 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: <https://trainingproviderportal.iosh.com/course/123456>.

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

The screenshot shows a search and filter interface for training courses. At the top is a search bar with the placeholder text 'Search'. Below this are several filter sections, each with a title and a list of options with checkboxes. The 'DELIVERY METHOD' section includes 'Face To Face', 'E-Learning', 'Distance', and 'Blended'. The 'CERTIFICATION TYPE' section includes 'Certificate', 'Passport', and 'Both'. The 'STATUS' section has a dropdown menu currently showing 'Active'. The 'COURSE DATE' section has two date pickers labeled 'Start' and 'End', both with the placeholder 'dd/mm/yyyy'. At the bottom are two buttons: a purple 'Search' button and a grey 'Reset' button.

Search

DELIVERY METHOD

- ☒ Face To Face
- ☒ E-Learning
- ☒ Distance
- ☒ Blended

CERTIFICATION TYPE

- ☒ Certificate
- ☒ Passport
- ☒ Both

STATUS

Active

COURSE DATE

Start

dd/mm/yyyy

End

dd/mm/yyyy

Search

Reset

Manage your accounts and pay invoices

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



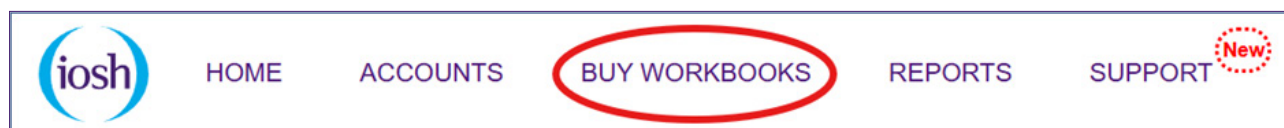
Once on the 'Accounts' page you can view and pay any outstanding invoices. It is possible to pay for more than one invoice at a time. To do this, follow the steps below.

- 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.

Invoices	Summary
<div><div>ISL391968 (34) Monday, January 13, 2025</div><div>Total: £24.02 Balance: £24.02</div><div>Status: Unpaid</div><div><input type="radio"/> Bulk Pay</div><div>View & Pay Now</div></div>	<div>Total: £1,596.09 Pay Now</div> <div><div>ISL391968 (34) Monday, January 13, 2025</div><div>Balance: £24.02</div></div> <div><div>ISL391967 (a) Wednesday, November 20, 2024</div><div>Balance: £1,500.00</div></div> <div><div>ISL391966 (11) Wednesday, November 20, 2024</div><div>Balance: £72.07</div></div>

Buy workbooks

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



- 2 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 'Order'. **The minimum order quantity for hardcopy workbooks is five per order.**

Note: You will only be able to order workbooks for courses for which you hold current licences.

1 Buy / Order Workbooks
2 Workbook Invoices

Orders placed and paid for by credit/debit card will be despatched within 2 working days.
Minimum order of each workbook type is 5.

Order

Workbook	Unit Price	Quantity	Cost
Managing Occupational Health And Wellbeing Workbook	£15.75	<input type="text" value="0"/>	£0.00
Managing Safety Workbook	£15.75	<input type="text" value="0"/>	£0.00

3 Review your delivery details which are automatically filled out 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.

Delivery Details

Name *

Phone

Country *

Postcode *

Q

Building *

Street

Town *

County *

Delivery Notes

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 'Order'.

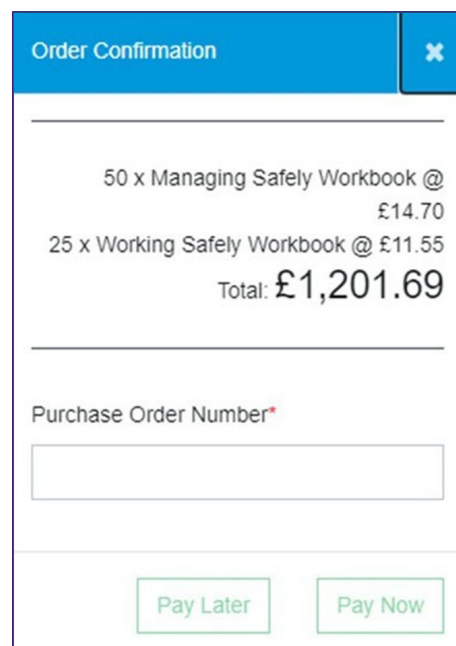
50 x Managing Safety Workbook @ £16.00
25 x Working Safety Workbook @ £12.00
Total: £1,100.00

Order

- 5 Once 'Order' is selected, an 'Order Confirmation' pop-up box will now 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. 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.

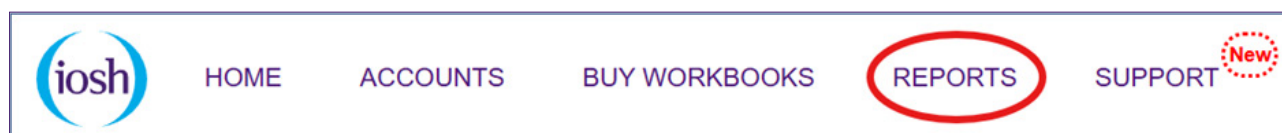
A screenshot of an 'Order Confirmation' pop-up box. The box has a blue header with the title 'Order Confirmation' and a close button (X). The main content area is white and contains the following text: '50 x Managing Safely Workbook @ £14.70', '25 x Working Safely Workbook @ £11.55', and 'Total: £1,201.69'. Below this is a section for 'Purchase Order Number*' with a text input field. At the bottom, there are two green buttons: 'Pay Later' and 'Pay Now'.

- 7 Once your order is complete, your workbooks will be dispatched by our supplier. Document orders paid by card will be dispatched within three working days, Monday to Friday, depending on stock availability.

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

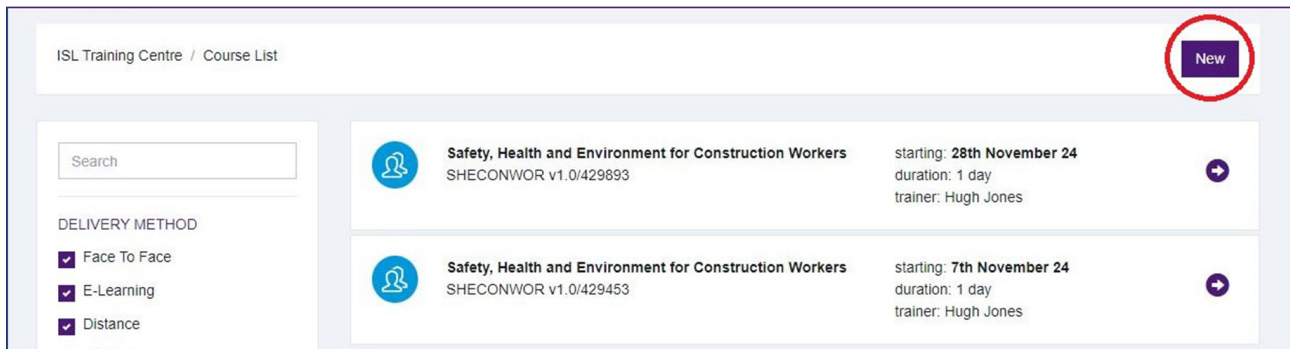


To find this function, click on the 'Reports' tab from your account dashboard.

Face-to-face courses

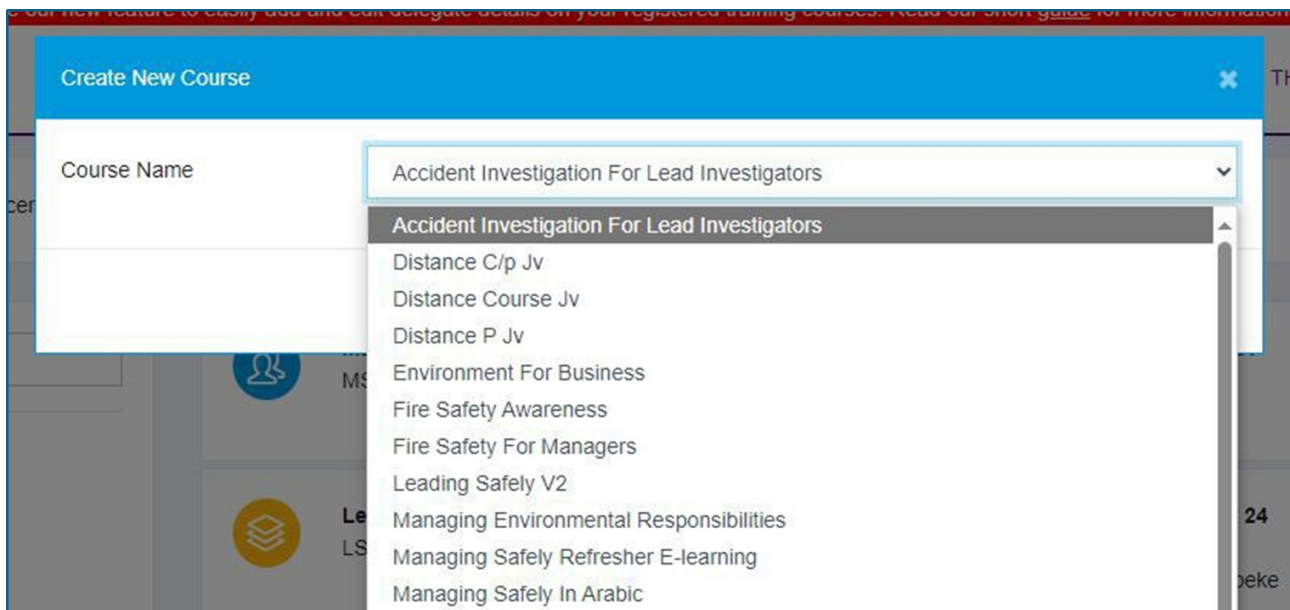
Register face-to-face courses

- 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	<p>The course venue details will automatically show your main administration address. You can make edits as follows:</p> <ul style="list-style-type: none"> • 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.

Managing Safely V 5.0 (MS5.0 PACK/5500485)

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 available. 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.

1 Register your course 2 Add Delegate details 3 Orders 4 Invoices

Course Dates

1 03/12/2024 Half-day Remove

2 04/12/2024 Half-day Remove

Venue

Country * United Kingdom

Postcode * LE18 1NN

Building * The Grange

Street Highfield Drive

Town * WIGSTON

County * Leicestershire

Trainer

Mr Kevin Dopson

Options

Exclude course from IOSH website

Video Conferencing

Please note, if you wish to assign digital workbooks to your delegates, please ensure you register your delegate details on 'step2' and assign their workbooks prior to the course start date.

Cancel Course Submit

Register face-to face course delegates

- 1 Select 'Add delegates & results' on the journey bar.

1 Register your course 2 Add delegates & results 3 Orders 4 Invoices

- 2 Delegate details can now be entered in the fields provided.
- 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 results are submitted. See [Amend or cancel delegates](#) for more information.

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'.

Address	Country	DOB	First name	Last name	Add Delegate	A1	Result	Status
Add Address	United Kin...	DOB	Firstname	Last Name	Add	0	-	

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.

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

Address	Country ⓘ	DOB	First name	Last name	Add Delegate	A1	Result	Status
Edit Address	Country	DOB	Firstname	Last Name	Add	0	-	
The Gran... ⓘ								

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.

The Grange Highfield Drive WIGSTON Leicestershire LE18 1NN	Country ⓘ	DOB	First name	Last name	Add Delegate	A1	Result	Status
	Country	DOB	Firstname	Last Name	Add	0	-	
The Gran... ⓘ								

6 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 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.

Country ⓘ	DOB		First name	Last name	Add Delegate	A1	Result	Status
United King ▾	04/01/1978		* John	* Doe	Update	0	-	Submit

- 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 results are entered and you click 'Submit', the delegate status will change to 'Added' and no further updates can be made.

Country ⓘ	DOB		First name	Last name	Add Delegate	A1	Result	Status
🇬🇧 United Kin...	04/01/1978		John	Doe	Added	1	Pass (1)	

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 delegates & results' 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.
- 3 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.

✓ 1 Register your course		2 Add delegates & results		3 Orders		4 Invoices		
Country ⓘ	DOB	First name	Last name	Add Delegate	A1	A2	Result	Status

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.

Address	Country	DOB	First name	Last name	Add Delegate	A1	A2	Result	Status
The Gran...	United Kin...	04/01/1984	John	Doe	Added	30	30	Pass (60)	
The Gran...	United Kin...	02/01/1976	John	Smith	Added	20	20	Fail (40)	Resit
Add Address	United Kin...	DOB	Firstname	Last Name	Add	0	0	-	

- 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.

Address	Country	DOB	First name	Last name	Add Delegate	A1	A2	Result	Status
The Gran...	United Kin...	04/01/1984	John	Doe	Added	30	30	Pass (60)	
The Gran...	United Kin...	02/01/1976	John	Smith	Added	20	20	Fail (40)	Resitting
The Gran...	<input type="text" value="United King"/>	<input type="text" value="02/01/1976"/>	<input type="text" value="John"/>	<input type="text" value="Smith"/>	Update	<input type="text" value="0"/>	<input type="text" value="0"/>	-	Submit

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 certificates for face-to face courses

- 1** Once your delegate results have been submitted, click on 'Orders' in the journey bar. You will now be presented with a list of all delegates that have passed your course and require a certificate.

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.

Register your course	Add delegates & results	Orders 3	Invoices 4
----------------------	-------------------------	-----------------	-------------------

Firstname

Jane

Lastname

Smith

Certificate

[Request Certificate](#)

1 x Certificate @ £21.00
Total: £21.00

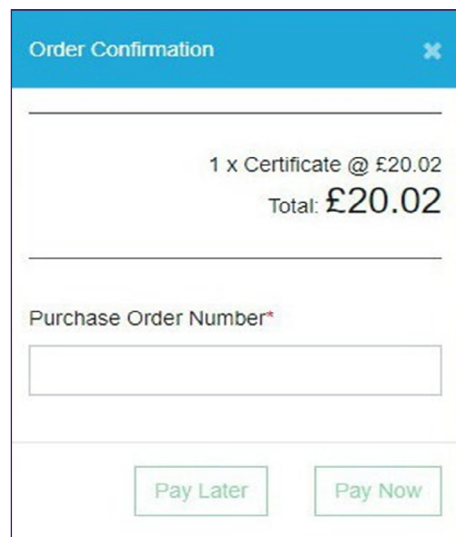
[Checkout](#)

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.

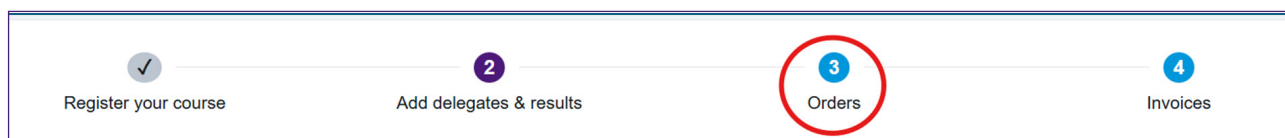


5 Providing your course is not under moderation and your payment is successfully processed, the certificates you've ordered will be printed and dispatched to your organisation's shipping address.

Purchase replacement certificates

1 Locate the course for which you would like to order replacement certificates using the [search options](#) available.

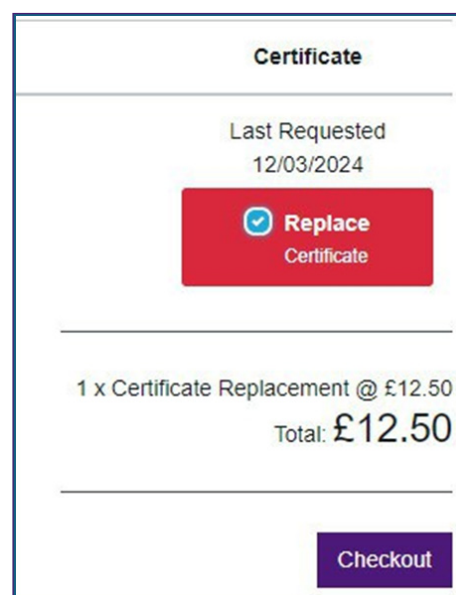
2 Select 'Orders' on the journey bar.



3 Locate the delegate requiring a replacement from the list and select 'Replace certificate'.

Note: If a delegate needs a replacement due to a spelling error or name change, contact us ahead of ordering your replacement.

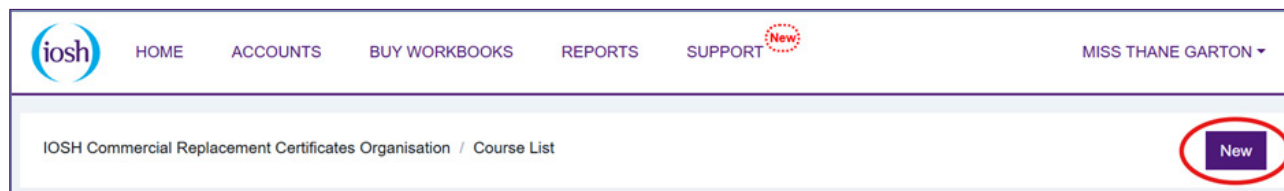
4 Select 'Checkout' to proceed with replacement certificate order. Follow the payment instructions [provided earlier in this section](#) to complete your order.



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:

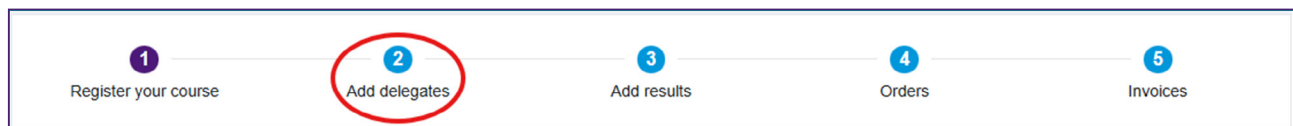
Course Date	Using the calendar tool, choose the date you intend to run the course on.
Venue	<p>The course venue details will automatically show your main administration address. You can make edits as follows:</p> <ul style="list-style-type: none">• UK address: Use the postcode search tool to populate 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.

- 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.

Leading Safely V2 (LS PACK v2/5500150)

Register Leading Safely delegates

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



- 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

- Navigate to 'Add results' from the journey bar.
- Enter the results for each delegate and click 'Submit'.

The screenshot shows the 'Add results' step of the journey bar, which is circled in red. Below the journey bar is a table with the following columns: Country, DOB, First name, Last name, A1, Result, and Status. The first row contains the following data: Liberia, 27/11/2002, John, Smith, 0, -, and a 'Submit' button.

Country	DOB	First name	Last name	A1	Result	Status
Liberia	27/11/2002	John	Smith	0	-	<button>Submit</button>

Submit resit results for Leading Safely courses

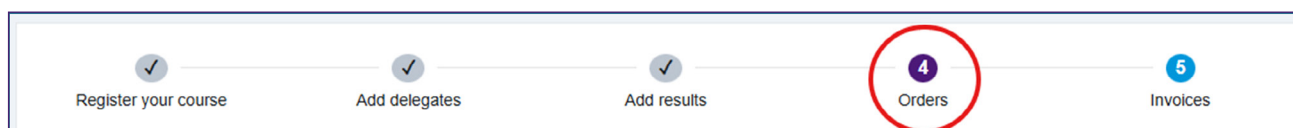
You can submit Leading Safely resit results by following the steps in the [submit resit results](#) section.

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

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



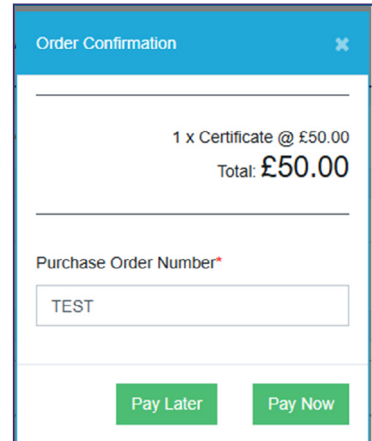
- To proceed, select 'Checkout'.

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.

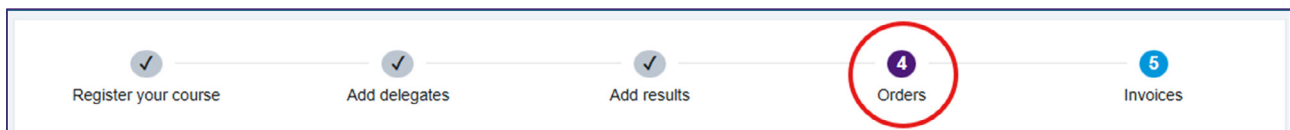
Pay Later: available only to training providers with a valid credit agreement and sufficient available credit with IOSH. Your available credit is calculated as your agreed credit limit minus your outstanding balance with IOSH. If you select 'Pay Later', an invoice will be generated automatically and emailed to your main admin contact.

A screenshot of an 'Order Confirmation' pop-up box. It has a blue header with the title 'Order Confirmation' and a close button. The main content area shows '1 x Certificate @ £50.00' and 'Total: £50.00'. Below this is a section for 'Purchase Order Number*' with a text input field containing 'TEST'. At the bottom, there are two green buttons: 'Pay Later' and 'Pay Now'.

5 Providing your course is not under moderation and your payment is successfully processed, the certificates you've ordered will be printed and dispatched to your organisation's shipping address.

Order Leading Safely delegate replacement certificates

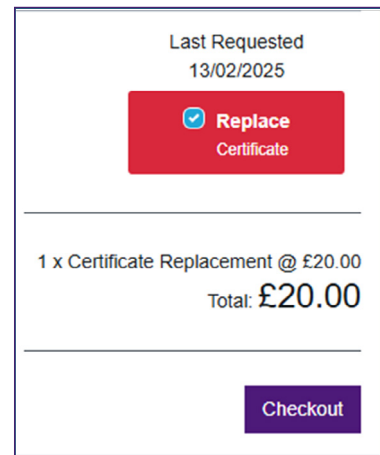
1 Navigate to 'Orders' in the journey bar.



2 Locate the delegate requiring a replacement from the list and select 'Replace certificate'.

Note: If a delegate needs a replacement due to a spelling error or name change, contact us ahead of ordering your replacement.

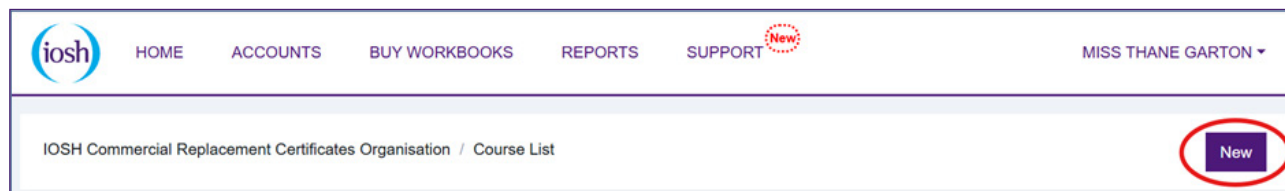
3 Select 'Checkout' to proceed with replacement certificate order. Follow the payment instructions [provided earlier in this section](#) to complete your order.

A screenshot of a 'Replace Certificate' order summary. It shows 'Last Requested 13/02/2025' at the top. Below this is a red button with a checkmark icon and the text 'Replace Certificate'. The main content area shows '1 x Certificate Replacement @ £20.00' and 'Total: £20.00'. At the bottom right, there is a purple button labeled 'Checkout'.

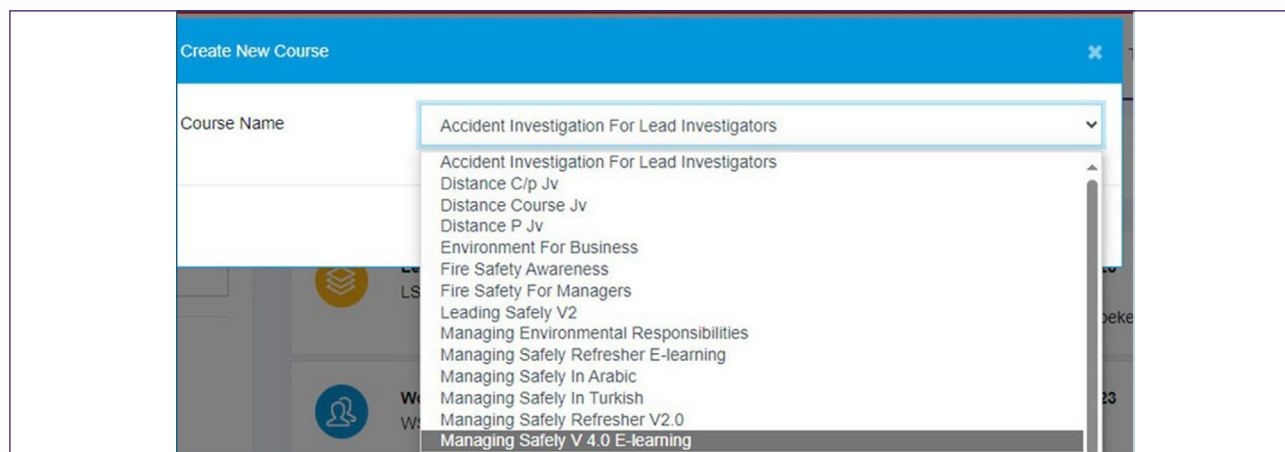
E-learning courses

Register e-learning courses and purchase 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 '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.

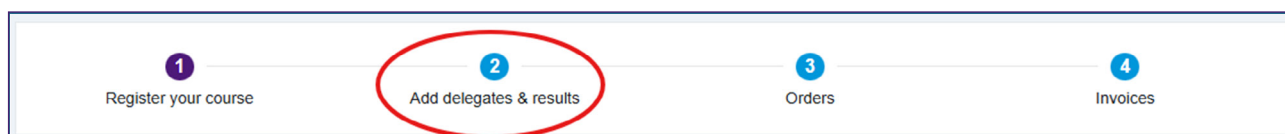
Pay Later: available only to training providers with a valid credit agreement and sufficient available credit. Your available credit is calculated as your agreed credit limit minus your outstanding balance with us. If you select 'Pay Later', an invoice will be generated automatically and emailed to your 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.

The modal window is titled 'Order Confirmation' with a close button (X) in the top right corner. It displays the following information:

- 50 x Certificate @ £25.00
- Total: £1,250.00
- Purchase Order Number* (with an empty input field below it)
- At the bottom, there are two buttons: 'Pay Later' and 'Pay Now'.

Register e-learning delegates

- 1 Select 'Add delegates & results' in the journey bar.



- 2 Enter each delegate's details, 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 section](#) 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'.**

Reference	Country ⓘ	DOB	First name	Last name	Add Delegate	A1	A2	Result	Status
Unique ID	Country	DOB	Firstname	Last Name	Add	0	0	-	
Unique ID	Country	DOB	Firstname	Last Name	Add	0	0	-	
Unique ID	Country	DOB	Firstname	Last Name	Add	0	0	-	
Unique ID	Country	DOB	Firstname	Last Name	Add	0	0	-	
Unique ID	Country	DOB	Firstname	Last Name	Add	0	0	-	

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 certificate order.

✓

Register your course

2

Add delegates & results

3

Orders

4

Invoices

Only passed assessments should be entered.

Reference	Country ⓘ	DOB	First name	Last name	Add Delegate	A1	A2	Result	Status
2226-1	🇮🇪 United Kin...	17/01/1980	John	Doe	Added	45	45	Pass (90)	Certificate ordered

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.

Order replacement e-learning 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 certificate following submission of their results. If you would like to order a replacement, click 'Orders' on the journey bar and select 'Replace certificate'.

✓

Register your course

✓

Add delegates & results

3

Orders

4

Invoices

Unique ID	Firstname	Lastname	Certificate
1688-2226-1	John	Doe	<div>Last Requested 12/03/2024</div> <div> <input type="checkbox"/> Replace Certificate </div>

Checkout

- 2 The total cost of the selected certificates will be calculated. To proceed with order, select 'Checkout'.
- 3 Once 'Checkout' is selected your payment options will appear on screen. Follow the same payment instructions [provided earlier in this section](#).