NESC Dental Course Booking System

Master Administrator User Guide
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Introduction

The NESC Dental School online booking system allows people to enrol themselves on courses and to pay for them online. This website also offers many administrative tools for course administrator such as printing course packs, producing certificates and recording registers.

The NESC Dental Website is part of the main NESC website (www.nesc.nhs.uk) and is linked to the online course booking system which is hosted on the medbook website (www.medbook.co.uk (previously known as 'Oxdent')) which was developed and is hosted by 1st Interactive Design Ltd.

The NESC part of the site hosts information useful to the all members of the dental e.g. Personal Developments Plans, Information regarding Specialist Training Committees, GDC regulations etc. This site is updated via the NESC Dental School using the Immediacy Editor.

The Medbook part of the website contains the course booking system. This document deals mainly with this part of the system and also some of the processes used within the NESC Dental Office.
# Types of Administrative User

As an administrator you will be given access to the Master Management Menu. This will allow you to add courses to the booking system, modify courses, print course packs etc.

There are four types of user who have access to the Master Management Menu:

1. Tutors (Educators, Course Organisers)
2. Booking Administrators (usually based in PGCs)
3. VT Administrators (based in NESC offices or PGCs)
4. Master Administrators (NESC Dental School Staff)

## Types of Administrative user and their access rights

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The type of access you are given, depends on the role you have within the NESC Dental School.
Logging into the NESC Dental Website

NESC Dental Course Administrators will need to use the following page to log into the Master Management Menu:

https://www.medbook.co.uk/nescadmin.html. Each administrator will receive their own username and password by the Master Administrator.

The options on the Master Management Menu will differ according to user access rights.

Master Management Menu as seen by a Booking Administrator

Courses and Bookings
- Add a new course
- Courses Management
- Course search
- Future Course (Online) - Enrolment Lists and Charge Payment Status
- Future Courses (Delegates Enrolled by Master Administrators) - Enrolment Lists and Charge Payment Status
- Future Offline Courses
- Oxford POMDE Room Booking System (offsite link)
- Past Courses
- Transfer a course mailing list to a different course
- Transfer all enrolments from one course to another
- Change Course Date & Reference Code - do NOT use for Multi-Part Courses
- Print a Course Pack

Print Course Certificates

Show Course Bookings

Cancel Bookings

Record management
- Practice Management
- Speakers Database
Before a course can be added, the course has to be approved by the NESC Dental Dean/Dental School Director or Associate Director.

For a course to be approved, certain processes have to be undertaken:

Initially, the tutor decides which courses are required, where they should take place and when they should take place. They liaise with their chosen speakers (the person/people who will actually teach the course). Once a course has been agreed, the tutors or their administrators fill out a course booking form. They send the form to either:

North Node: Co-ordinator at the NESC Dental Office, Oxford
South Node: Co-ordinator at the NESC Dental Office, Winchester

These forms are checked then submitted to the Dean/Associate Director for educational approval.

Once the form has been signed, the course co-ordinator will contact the tutor and the administrator, by email, advising them that the course has been approved and that the course should then be put onto the website.

The administrator then puts the course on the website and organises catering, course packs, photocopying handouts, etc. Once the course has run, the postgraduate administrator is responsible for copying the register and then sending the original to the course co-ordinator.

The postgraduate administrator is also responsible for collating the evaluation forms, summarising them and emailing the results to the course tutor and course co-ordinator.

For more information please see Appendix D.
Add a New Course

1. Log into the Management Menu
2. Under the 'Courses and Bookings' menu, click ‘Add a new course’

This will bring you to the ‘Add Course’ screen. Fill in the details according to the approved course booking form.

Add Course Screen

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<th>Explanation of Fields</th>
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<tr>
<td>Course Location</td>
<td>This must be filled in first otherwise any information filled in afterwards will be cleared and you will need to add the information again. The Course Location is linked to the ‘Regular Course Venue’ field. Once a location is chosen, it pre-fills the ‘Regular Course Venue’ field with the corresponding data, i.e. If the chosen location is the John Radcliffe Hospital, then the ‘Regular Course Venue’ field is filled with locations relating only to the John Radcliffe, e.g. The George Pickering PGC or the Kadoorie Centre. However if the ‘Course Location’ field is changed to The Horton Hospital, the ‘Regular Course Venue’ field will only give the option of the ‘Terrence Mortimer PGC’. To add additional Locations, you will need to contact the NESC Dental Education Office who will log a call with 1st Interactive Design Ltd.</td>
</tr>
<tr>
<td>Regular Course Venue</td>
<td>This field links to the ‘Course Location Field’. The list of available venues will depend on the chosen location. To add additional venues, you will need ‘Master Administrator’ rights. If you do not have access and require another ‘regular course venue’, please contact the NESC Dental Education Office.</td>
</tr>
<tr>
<td>Other Course Venue</td>
<td>This is used if the course venue is unlikely to be used more than once, there are two options for the use of this field. The first option is that the venue is located in a different room in an existing location, e.g. the John Radcliffe Hospital. In this instant just type in the name of the new course venue. However sometimes the location may be completely new (e.g. you may be hosting a conference in a hotel). In this case, in the field ‘Course Location’, choose the option ‘Other Location’. This will have the effect of putting the status ‘Not applicable’ in the ‘Regular Course Venue’ field. You can then fill in this field with the ‘ad hoc’ course venue.</td>
</tr>
<tr>
<td>Organising Area</td>
<td>This field describes either the geographical area or type of programme and links to the Course code. In order that the course code is correct, choose the correct organising area. Please see Appendix A for a list of the codes and which area they relate to. If the course is organised by another organisation (e.g. the BDA) please choose ‘Other’.</td>
</tr>
<tr>
<td>Other Organising Body (If Applicable)</td>
<td>This field is ONLY used if the course is NOT organised by the NESC Dental School (e.g. BDA course)</td>
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<tr>
<td>Course Topics</td>
<td>The contents of this field are used when searching for courses. The topic is determined by the contents of the Course Booking Form. Please note that if the main topic has sub-topics then one of the sub-topics must be chosen.</td>
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**Course Title**

Please use the title as specified on the Course Booking Form. If this is not possible, e.g. the title is too long, please condense into a more suitable title. If you are unsure, consult the tutor.

If it is a multi-part course, the title must end with the course part number, e.g. Extractions Without Pain – Part 1

**Scheduling Options**

**Start Date/Time**

Fill in the date of the course. Please note that the maximum length of a single course is one day so it is **important that the start and end date are equal**.

**One Part ☑️ Multi-Part ☐**

‘One Part’ is the default option. This indicates the course is only scheduled to run for the duration of one day, and does not take place on more than one day. If the course runs over several days, it is considered to be a multi-part course. If ‘Multi-Part’ is chosen, then it will be necessary to input all the details that are required for a multi-part course.

**Multi-Part**

These are courses that are scheduled over more than one day e.g. a 3-day multi-part course could take place on: 2nd August 2008, 15th October 2008 and 12th January 2009. When a person enrols on a multi-part course, they are automatically enrolled on all parts of the course. They must also attend all parts of the course to qualify for a certificate of attendance.

**Multi-part Courses**

**Number of Course Parts**

Enter number of course parts as specified on the course booking form.

**Which Part is This?**

When inputting a multi-part course onto the website, it is important to **put them on the system in order**, i.e. part 1 must be entered first, then part 2 etc. **Please note that once this process has started you must continue to add all parts in order — i.e. you cannot add part one, leave the process and add the other parts later.** If for some reason you are unable to complete the process for adding a multipart course, please delete any parts created and re-start the process.

**Dates for Part 2**

Enter the date of the second part of the course.

**Dates for Part 3 (if applicable)**

Enter the date for the third part of the course.

**Dates for Part 4 (if applicable)**

Enter the date for the fourth part of the course.

*Please note that if a course has more than four parts, it will be classified as a ‘Programme’. If this is the case, please contact the course co-ordinator on 01865 740650 for more information.*

**Require Pre-Authorisation**

Some courses are organised so that delegates have to be authorised on a course before they can attend. This option has the effect of replacing the ‘Add to shopping cart’ button with an ‘Express Interest’ button. As such, delegates cannot book themselves onto a course. However once they have clicked the ‘Express Interest’ button, an email is sent to the organising tutor and administrator advising them that a delegate is interested in the course. The tutor assesses the delegate and then advises the administrator that he/she is suitable to attend. The administrator then uses the ‘Authorise enrolment on this course’ facility (see page 26) so that the interested delegate can book on the course.

**Pair Booking**

Some courses require the participation of two delegates working as a team, e.g. a dentist and a dental nurse. By clicking the ‘Yes’ button, this will enforce the person enrolling onto a course to enrol another person at the same time. Pair bookings can also be used with multipart courses. Please see ‘Course Fees’ for more details.
### Course Code
This field links to the ‘Organising Area’ field and the date field. Click the button saying ‘Click Button to enter Course Code’. E.g. If the Organising area is Buckinghamshire and the date is 15th September 2008, then the course code will be BU150908.

If the course is organised any another organisation and the 'Get Course Code' button has been clicked, the course code will appear as XX followed by the course date, e.g. XX150908. Please input a suitable code (in place of the XXs as specified in Appendix A.), e.g. a BDA Milton Keynes Section course taking place on 2 May 2009 could be BDAMK020509

### Course Type
There is a choice of:
- Internal – Organised via NESC Dental tutors and advisers
- External – Not organised by NESC Dental Education Office, e.g. BDA courses

Choose whichever is most appropriate according to the course booking form.

### Course Category
There is a choice of:
- Sec 63
- Other Approved
- Other verifiable inc e-learning

All courses input by the booking administrator will normally be ‘Sec 63’, unless stated differently on the Course Booking Form. Please note there are separate course booking forms for external courses and other approved courses. If you are unsure about the course category, please contact the Course Co-ordinator.

### Hands-on or Lecture
Please consult the Course Booking Form for this information. A hands-on course will often be held in a ‘skills room’ (somewhere suitable for performing dental operations) and will involve use of dental materials and consumables. These courses normally incur a bench fee of £50.00.

A lecture does not involve practical sessions requiring consumables, equipment or materials. If there is a “materials charge”, it will usually be for handouts.

### Course Description
Please copy the description from the Course Booking Form. If there is any other information such as the course’s intended delegates, e.g. GDPs, Dental Nurses, the dental team, please add this information in this field.

### 1st Course Aim or Objective
Please copy the 1st Course Aim or Objective from the Course Booking Form. This field is mandatory (all courses should have at least 3 aims/objectives).

### 2nd Course Aim or Objective
Please copy the 2nd Course Aim or Objective from the Course Booking Form. This field is mandatory (all courses should have at least 3 aims/objectives).

### 3rd Course Aim or Objective
Please copy the 3rd Course Aim or Objective from the Course Booking Form. This field is mandatory (all courses should have at least 3 aims/objectives).

### 4th Course Aim or Objective
Please copy the 4th Course Aim or Objective from the Course Booking Form.

### 5th Course Aim or Objective
Please copy the 5th Course Aim or Objective from the Course Booking Form.

### Programme
If a programme has been included in the Course Booking Form, please copy this into the field.

### Equipment List
Please consult the Course Booking Form for this information.
Speaker 1  Please consult the Course Booking Form for this information
Speaker 2  Please consult the Course Booking Form for this information
Speaker 3  Please consult the Course Booking Form for this information
Speaker 4  Please consult the Course Booking Form for this information
Other Comments  Please consult the Course Booking Form for this information. This field is also useful for courses run by other organisations. Information such as who to contact regarding any more information can be put in this field.
Catering/Booking Fee  Please consult the Course Booking Form for this information. Please make sure the catering fee covers the entire cost of catering including teas/coffees etc plus a £1.00 booking fee. Please note the system can now process courses with no fee.
    Please note that if the course is a multipart course, the fee displayed on the course details page is picked up from the 1st part/day. Therefore it is important to remember to multiply the fee by the number of parts/days, e.g. a 3 part course with catering at £20 per day = £60, therefore £60 should be entered into this field.
Materials/Bench Fee  Please consult the Course Booking Form for this information. Materials for a hands on course is charged at a flat fee of £50.00. If the materials are more specialised and are more expensive than this flat fee, please consult the organising tutor. A materials charge is also required if there are any handouts.
    Please note that if the course is a multipart course, the fee displayed on the course details page is picked up from the 1st part/day. Therefore it is important to remember to multiply the fee by the number of parts/days, e.g. a 2 part course with a bench fee of £50 is 2 x £50, therefore £50 should be entered into this field.
Pair Booking Fees  The fee entered into either the Catering/Booking Fee or Materials/Bench Fee is applicable to all delegates so please bear this in mind when you are working out the cost for a pair booking course. The main reason for creating a pair booking course is that two members of the dental have to work together—in most cases this will mean a dentist working with a dental nurse usually in a skills centre environment. This means they will be working on one workstation. Normally the bench fee is £50 per person. In this case the fee would be split between the two delegates. So for a 1 part course taking place in a skills centre, which does not include catering, the fee per delegate would be £25.
    In the case of a 1 part course with catering, the fee would be worked out as such:
    Bench fee (£50 split between 2 delegates) = £25
    Catering = £20 per person
    Therefore the cost per delegate would be £45
    If the course was a two day multipart course, just double the fee (£90 per delegate)

However...occasionally a course is arranged so that the dentist is expected to attend both parts but the dental nurse attends just the second part. In this case the fee is worked out as:


<table>
<thead>
<tr>
<th>Day 1 (Dentist Only)</th>
<th>Day 2 (Dentist and Dental Nurse)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bench Fee = £50</td>
<td>Bench Fee = £50</td>
</tr>
<tr>
<td>Catering (x 1) = £20</td>
<td>Catering (x 2) = £40</td>
</tr>
<tr>
<td>Total = £70</td>
<td>Total = £90</td>
</tr>
</tbody>
</table>

Total Fee
Day 1 (£70) + Day 2 (£90) divided by 2 = £80 per person
**Maximum Course Places**

Input the maximum number of people allowed to attend this course. Please consult the Course Booking Form for this information. This also depends on the size of venue. If there are any doubts, ask the tutor.

**CPD Hours**

Please consult the Course Booking Form for this information.

**Use Online Booking**

This option should always be ‘Yes’ unless there is a reason why people should not book their courses online (e.g. if the course is organised by the BDA). If the option ‘No’ is chosen, the course summary in the course calendar will display ‘No Place Data Available’.

Where online booking is not selected, NESC Dental School cannot accept payment.

**Course Tutor**

Please choose the organising tutor from the dropdown list. Please bear in mind that tutors may have more than one record. This is because tutors are linked to postgraduate administrators. Administrators are assigned to tutors depending on the type of course. If you are unsure which tutor to use, please contact the Course Co-ordinator.

**Display Status**

The default is ‘On-line’. This option will automatically display the course on the internet. If the option ‘Off-Line’, the course can only be viewed via the Master Management Menu.

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*Once a course has been added, please check the course to make sure the course details are correct.*
Courses Management

Clicking this option brings the admin user to the course list. This page lists all future courses that are displayed online, in ascending date order. It is also possible to filter a search by course location or by course topic. Just click on the required course to view course details. It is also possible to change from the course list view to the course calendar view. The course calendar view defaults to the current month, e.g. if the current month is March 2009, then the course calendar will bring up March 2009.

To view details about a course, click on the course title. This will bring up the course information screen which includes information such as date, time, location, course fee etc. This page will also show options to ‘Add Similar’, ‘Show Course’s Month’, ‘Modify This’ and ‘Delete This’. These options do not appear to the delegates logged into the system.

Example of a course information page
(please note only users with administrative access will be able to see the course modification functions)

Add Similar

Occasionally courses are repeated. Although the date and the venue may change, the course content remains the same. In this case it is possible to ‘copy’ a course, therefore saving time and effort.

To copy a course, click ‘Add Similar’. This will bring up ‘Add Course’ screen. However in this case, most of the fields will be pre-filled with the details of the course you wish to copy. Remember to make all the necessary changes, e.g. date, venue, tutor and click ‘Submit’.

13
Show Course’s Month

This option brings up the course calendar in the month of the course shown on the screen, as opposed to the current month.

Modify This

If you wish to make small changes (e.g. correcting spelling mistakes) to a course, then click ‘Modify This’. This brings up the ‘Add Course’ screen.

Please note you cannot change dates or times using the ‘Modify This’ option, once a course has been added. If you do need to make a change to the date and/or time of a course, please see ‘Change a Course Reference—do NOT use for Multi-Part Course’

Delete This

Choose this option If you wish to delete a course. However clicking on the ‘Delete This’ tab will not automatically delete a course.

Instead a screen will appear showing details about the course and giving the options to delete or cancel, thus avoiding any accidental deletions.

If there are any delegates enrolled on the courses, you will need to cancel them from the course before deleting it.

Course Search

This option allows the administrator to make a more detailed search for courses within a certain period and by location. It is also possible to further filter the search by choosing a facility within the chosen location.

Future Course (Online) Enrolment Lists and Charge Payment Status

This option allows the administrator to view the enrolment lists of courses which allow online booking by the delegate. By clicking on this option, the administrator will see a list of courses (in date ascending order).

Click on the required course. This will bring up a list of delegates. Information regarding delegates on this page include:

- Name
- Staff ID (this is the user ID generated by the website)
- Catering/Materials Charges Paid? Although most courses are set up to take online payments, there are some courses that can take other methods of payment. Administrators can also change the payment status by clicking ‘Click to Change’. Please check these to chase payment.
- Netbanx reference number
- Contact Telephone Number
- GDC Number
- Email Address

Administrators can also change the payment status by clicking the button by the delegate’s name (e.g. if a delegate has paid by cheque).
Future Courses (Delegates Enrolled by Master Administrators)
Enrolment Lists and Charge Payment Status

This option allows the administrator to view the enrolment lists of courses which do not allow online booking by the delegate (i.e. only master administrators can book delegates onto these courses). By clicking on this option, the administrator will see a list of courses being held in the future, i.e. courses running from the current date onwards—in date order. PLEASE NOTE THAT THESE COURSES ARE BEING PHASED OUT—IT IS NO LONGER POSSIBLE TO CHOOSE THE ‘MASTER ADMINISTRATOR ONLY BOOK ONLINE’ OPTION WHEN ADDING A COURSE—INSTEAD ADMINISTRATORS NEED TO CHOOSE THE ‘NOT BOOKABLE ONLINE’ OPTION.

Click on the required course. This will bring up a list of delegates. Information regarding delegates on this page include:

- Name
- Staff ID (this is the user ID generated by the website)
- Catering/Materials Charges Paid? (although we are only taking online payment, there are courses that were put onto the system before the upgrade and as such may have delegates who have enrolled but have not paid. Please check these to chase payment. The status can be changed by clicking ‘Click to Change’
- Netbanx reference number
- Contact Telephone Number
- GDC Number
- Email Address

Future Off-line Courses

This facility is used for modifying courses that are on the website but are not visible on the course calendar. These are only visible to users with administrator access. This option is used if a course is not ready to be viewed by all users. A course is made off-line by choosing the ‘No’ option in the ‘Display Status’ field when adding or amending a course.

By clicking this option, a page opens listing all the off-line courses. Click on the required course. This will open the ‘Course Details’ page. If it is necessary to make any changes, click ‘Modify This’ which in turn will open the ‘Add Course’ screen. From here it is possible to change the course to be ‘on-line’

Oxford PGMDE Room Booking System (offsite link)

This function links to the old ‘Oxdent’ site. This function is used as a diary particularly with reference to Alex Forsyth, the Dental technician at the John Radcliffe Hospital. This function does not allow administrators to book rooms at the John Radcliffe site (to do that you must contact the postgraduate administrator) - it just allows the user to view which rooms are available.
Past Courses

The administrator can look at a list of all past courses both offline and online. This option allows the administrator to check the enrolment list of courses that have occurred in the past. This is useful for checking which delegates have paid and which haven’t.

Click on the required course. This will bring up a list of delegates. Information regarding delegates on this page include:

- Name
- Staff ID (this is the user ID generated by the website)
- Catering/Materials Charges Paid? (it is possible to book people onto courses without going through the online payment system. These people can pay by cheque or cash. To keep a record of these payments, administrators can also change the payment status by clicking ‘Click to Change’.
- Netbank reference number
- Contact Telephone Number
- GDC Number

The administrator can also view the course details from this list.

Transfer a course mailing list to a different course

There is no waiting list for courses. However the potential delegate does have the option of adding themselves to a mailing list. If a delegate cancels their enrolment, an email message is sent to all those on the mailing list advising them that a place has become free. The place is offered on a first come-first served basis.

If a course is very popular, it may become necessary to repeat it. In this case it is possible to alert all the people on the original course’s mailing list to another course, alerting them of the new course, thus giving them the option to book onto the alternative course.

The first step is to make sure there is another course to move delegates to. If not then create another course. This is done clicking onto the details of the course that is to be replicated and clicking the ‘Add Similar’ option. Make a note of the new course’s code.

Go into the Master Management Menu and choose ‘Transfer a Course Mailing List to a Course to a New Course’. Then in the ‘Enter Old Course Reference’ enter the course code of the course with the waiting list and in the ‘Enter New Course Reference’, enter the course code of the course you have just created. Click ‘Transfer List’. This will transfer all the people on the original course onto the new course.

Transfer all enrolments from one course to another

This option is used if a course has to be cancelled and the same course is being run on a different date and/or location. It is possible to move all the enrolled delegates to another course. Only use this option if the course on which you wish to move your delegate to, is already on the system, otherwise use ‘Change a Course Reference—do NOT use for Multi-Part Courses’ option.

First make sure there is another course to move delegates to. If not then create another course. This is done clicking onto the details of the course that is to be replicated and clicking the ‘Add Similar’ option. Make a note of the new course’s code.

Go into the Master Management Menu and choose ‘Transfer ALL Enrolments from a Course to a New Course’. Then in the ‘Enter Old Course Reference’ enter the course code of the course with the waiting list and in the ‘Enter New Course Reference’, enter the course code of the course you have just created. Click ‘Transfer List’. This will transfer all the people on the original course onto the new course.
**Print a Course Pack**

This option allows the administrator to print a course pack, i.e. a register, an FP84 form, a course evaluation form, tutors self evaluation forms and expense forms. Please note that attendance certificates can be printed off the ‘Print Course Certificates’ function. The administrator will need to photocopy enough copies of the FP84 and the course evaluation for all the delegates.

On the day of the course, the administrator is responsible for handing over the course pack to the tutor (or speaker if the course tutor is unavailable) and for making sure the register is signed by the delegates. Evaluation forms should be collated, and analysed and given to the tutor to enable a ‘Thank You’ letter to be sent to the speaker.

Please make sure FP84 forms are only handed out after the course has finished.
**Print Course Certificates**

If certificates are required for the course, this option allows the administrator to print these automatically. The course certificates contain the following information:

- Name
- GDC Number
- Course Title
- Course Date
- Course Venue
- Number of CPD Hours

The certificate must be signed by either the tutor, speaker or administrator. If you are unhappy at the format of the certificates, it is possible to copy and paste into a word document and make any aesthetic changes.

**Show Course Bookings**

This is a shortcut to finding out the delegate list of a particular course, instead of looking through the ‘Future Courses’ list. Type in the course code and click ‘Go’.

**Cancel Bookings**

This option allows the administrator to cancel all the enrolments who have not enrolled using the Netbanx payment system (e.g. enrollments from a course at one time. This option is used if a course is cancelled—Please do not use this option if the course has been rescheduled. If a course has been rescheduled, please use the ‘Transfer ALL Enrolments from a Course to a New Course’ facility.

Type in the course code and click ‘Go’. This will bring up a the course title, date and venue. Please check if this is the correct course. This page also shows the names of all the delegates who are enrolled on the course. Please print off the list (preferable using the ‘Show Course Bookings’ function as this gives details such as email addresses and telephone numbers).
This part of the website shows all the practices registered with the NESC Dental School. The information stored here can be downloaded by the master administrators. This information is used mainly for mail-shots to dental practices.

**Find a Record**
This option allows the administrator to find a particular practice or practices. All the fields are set to the default of ‘disabled’. This means that if anything is entered whilst all the ‘disabled’ radio buttons are highlighted, then all the records will be shown.

To find a practice using one or more criteria, the corresponding ‘enabled’ option has to be button has to be highlighted (*Please see illustration to your right)*

If you are searching for just one practice, it is possible to input as many criteria as there are fields but a result is more likely to be found if only the postcode is entered. (*See illustration to your below*)

**View all Records**
Click here to view all records.

**View a Record**
If you know the record number. In the case of the example shown, the record number is 1. The record number can be seen on the left-hand side of the practice record.

**Add a Record**
Occasionally you may need to add a practice. To do this, click ‘Add a Record’. This will bring up a table of empty fields. Please fill in appropriately

**Copy a Record**
Some practices have an almost identical address. If you know the record number of a practice that has a similar address to the one you want to add, enter this number in the field where it says ‘Enter a Record Index’ and click Copy a Record. Make the necessary changes and click ‘Add Now’.
**Modify a Record**
Occasionally it is necessary to make changes to a practice address. Using the ‘Find a record’ function, get the record index. Input the record number into the field called ‘Enter Record Index’, click ‘Modify a Record’ and make the required changes.

**Delete a Record**
Occasionally it is necessary to change a practice address. Using the ‘Find a record’ function, get the record index. Input the record number into the field called ‘Enter Record Index’, click ‘Delete Record’. Make sure the record is the correct one for deleting before ‘Delete Now’ is clicked.

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**Speakers Database**

Speakers - Below is the Management Menu for the Speakers database. It is currently restricted to adding, modifying, copying and deleting records. Other functions will be added when the speakers database has been populated.

The prime task now is to add new records to the Speakers database and then to assign topics and/or sub-topics to each speaker - see Section 2 below.

Please ignore the other 3 databases.

Speaker Topics - CLICK HERE to access the Speaker Topics database
Speaker Ratings - CLICK HERE to access the Speaker Ratings database
Topics - CLICK HERE to access the Topics database
Sub-Topics - CLICK HERE to access the Sub-Topics database

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This function is used to keep a record of speakers. Tutors and administrators can access this information if they need to find a speaker.

The speakers database holds information such as contact details as well as qualifications, space to add a link to the speaker’s website (if applicable) and fees they are likely to charge.
When a person with ‘Master Administrator’ access logs into the Master Management Menu, they get a different view from the Booking Administrators and the VT Administrators. A Master Administrator has all the access rights of the other administrators plus access to other functions, e.g. A Master Administrator can set up a user to access the Master Management Menu.

**The illustration below shows the Master Management Menu when accessed by a Master Administrator**

**Master Management Menu**

**Courses and Bookings**
- Add a new course
- Courses Management
- Course Search
- Future Course (Online) - Enrolment Lists and Charge Payment Status
- Future Courses (Delegates Enrolled by Master Administrators) - Enrolment Lists and Charge Payment Status
- Future Offline Courses
- Master Administrators ONLY - Book Online
- Oxford PGMDE Room Booking System (offsite link)
- Past Courses
- Transfer a course mailing list to a different course
- Transfer all enrolments from one course to another
- Record Attendee CPD Hours
- Change Course Date & Reference Code - do NOT use for Multi-Part Courses
- Unpaid Course Bookings

**VT courses**
- Add a VT course
- Add, change or delete VT Staff
- Change a VT Course Date Only (NOT a VT Course)
- Delete a VT Course
- View VT Course Diary
- Print a VT Course Pack

**Record management**
- Administrator Management
- Delegate Management
- Facilities Management
- Locations Management
- Payment History Management
- Practice Management
- Speakers Database
- Status code Management
- Tutors Management

**Downloads**
- Courses including CPD hrs
- Delegate Attendance
- Delegate DNA
- Dental Staff
- Practices

Occasionally a message in red font will appear advising ‘x number of cancellations are awaiting processing’. Please see the document ‘Processing Cancellations’ for more information — available from the Course Co-ordinator.
Occasionally it is necessary for only Master Administrators to be able to book delegates onto particular courses. e.g. the NHS induction programme. The reason for the control is because delegates have to satisfy particular requirements to be accepted onto a course before they are enrolled. Please note that administrators can no longer create courses with the option Master Administrators ONLY Book Online. If you need to restrict booking access, please choose the option, ‘Not bookable online’ when creating a course.

It is possible to make any changes to these courses by click ‘Modify This’ which in turn will open up the Add a New Course page.

Record Attendee CPD Hours

So that the NESC Dental School can keep a record of delegates’ CPD hours, the transfer CDP Hours to Access function is used.

Once the NESC Dental School has received the registers from the postgraduate centre administrators, they record this information (i.e. who attended or did not attend the course). This can only be done by a member of staff who works at the Triangle because they are the only people who have access to the Access database which is on the IMSU (Oxford University) server.

To record the course attendance, select the financial year in which the course was held, e.g. if a course was held in March 2008, then the financial year would be 2007—2008. If a course is held in April 2008, the financial year is 2008—2009. This will bring up a list of courses within that year. Choose the course you wish to process, fill out the correct details. The default is ‘attended’. However there are two other options: DNA and Valid DNA. DNA means the delegates did not attend the course and did not inform the Deanery or postgraduate centre in advance or on the day. A Valid DNA means the delegate could not attend the course with due reason, e.g. they were ill.

The form looks like this:

<table>
<thead>
<tr>
<th>Name</th>
<th>Staff ID</th>
<th>Enrolled Status</th>
<th>Confirmation Number</th>
<th>Attendance Flag</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>CE</td>
<td>OX070308</td>
<td>Attended ○ Valid DNA ○ Invalid DNA ○</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CE</td>
<td>OX070308</td>
<td>Attended ○ Valid DNA ○ Invalid DNA ○</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CE</td>
<td>OX070308</td>
<td>Attended ○ Valid DNA ○ Invalid DNA ○</td>
</tr>
</tbody>
</table>

End of List
It is now possible for Master Administrators to enrol delegates without going through the online payment system. When a master administrator enrols a delegate onto a course they have the option to waive payment. If payment is waived, no further action is taken. However if payment is not waived the delegate will appear in this list. The reason for this function is so that delegates can phone the call centre with their user IDs and the course code. The ‘Unpaid Course Bookings’ list is also visible to the call centre staff at 1st interactive who take telephone bookings. The call centre staff can then speed up the process by just clicking on the delegate’s record and taking payment (the payment part of this function is not available to NESC administrators).
Record Management

Administrators Management

This function allows the Master Administrator to control the access to the Master Management Menu for other administrators. Please see page 3 for more details.

To add an administrator (of any kind), click ‘Administrator Management’. At the bottom of the screen, click ‘add admin user’.

Type in a user name. The user name can contain both capital and lowercase letters but there must not be a space.

Choose the appropriate user access. Type in a password and then retype it. Click ‘Submit’.

It is also possible to make changes to user access once they have been added, e.g. a person with booking administrator rights can have their access changed to e.g. Master Administrator.

Alternatively an administrator can have their access revoked by choosing the ‘delete this user’ option.

Please note it is very important to delete an administrative user once their involvement with the NESC Dental School has ended.

Add admin user

user name

password

retype password

Submit

Bookings Management

This function allows the administrator to view details regarding an enrolment.

View Booking Record

To view details of a course booking, enter the booking reference number (this is the number that is given to each person who enrolls on a course—it can be found by using the Future/Past Course Enrolment Lists). By entering this number it is possible find out these details:
- Date of Booking,
- Course Code;
- Number of Course Parts;
- Course Date in the Past? (yes/no);
- Reminder Email Sent (3 weeks before course date)? (yes/no);
- Last Name;
- First Name;
- Confirmed Enrolled or Waiting List;
- GDC Number;
- ID Code;
- Email Address;
- Contact Telephone No.;
- Have they Paid? (Yes/No)

Modify details of a course booking

To modify details of a course booking, enter the booking reference number (this is the number that is given to each person who enrolls on a course). By entering this number it is possible find out these details:
- Date of Booking,
- Course Code;
- Number of Course Parts;
- Course Date in the Past? (yes/no);
- Reminder Email Sent (3 weeks before course date)? (yes/no);
- Last Name;
- First Name;
- Confirmed Enrolled or Waiting List;
- GDC Number;
- ID Code;
- Email Address;
- Contact Telephone No.;
- Have they Paid? (Yes/No)

Enrol (or cancel) someone on a completed course

Due to the constriction of the online payment system, it is no longer possible to enrol or cancel anyone from completed courses. Please contact Liz Hennessy at the NESC Dental School if you need more information.
Delegate Management

This function allows the administrator to view information regarding the delegates. The information stored is:

- User name
- First Name
- Last Name
- Registration date (YYYYMMDD)
- Date of Birth (YYYYMMDD)
- Email
- Practice ID
- Telephone No
- Mobile No
- Fax No
- GDC Number
- GMC Number
- NHS Performer list number
- Status Code
- Trainer
- Qualifications
- Specialism
- FSQA No
- Non-practice address
- Address Line 2
- Address Line 3
- Town
- County
- Post Code
- Security question
- Answer to security question

Find a Record

There are nearly 4000 delegate records. Rather than scroll through them, it is possible to search for an individual delegate. In this section, all the fields are disabled. To find a particular delegate, type into a relevant field, a piece of information, click the enable radio button and click ‘Search Now’. It is advisable to search for delegates using unique identifiers such as GDC numbers of performer list numbers. If these are not available then search using surname.

*Please note you must ask their security question and receive a correct reply before any changes are made.*

View All Records

This brings up a list of all the delegates in groups of ten.

View Staff Record

If you know the record number of the delegate, it is possible to enter it in this section.

Once a record is found, it is possible to view the delegate’s details such as username, address and answer to their security question.

Please note that the address field does not populate until the delegate enrols on a course.

Also on this screen it is possible to:

- Delete a user
- Manage a user
- Log in as the user
- Authorise an enrolment
- View the delegate’s attendance history
Delete (a user)

Occasionally it may be necessary to delete a user. Always check the delegate’s attendance history before deleting. If the user has attended a course, do not delete.

One common reason to delete the user is that they contact the NESC Dental Office because they cannot log into the website or that they complain someone else is using their GDC number. Usually this is because the user is registered twice. Always check the attendance history before deleting a delegate’s record. Only delete the record with no attendance. If both records have an attendance history, please contact the NESC Dental Office.

Manage (a user)

This option will bring the administrator back to the Delegate management screen. The only difference will be that the record index number will have been pre-filled in the ‘View a Record’ and ‘Modify a Record’ fields.

Log in as this user

This option will log out the administrator and log the administrator into the system as the user. The administrator will be automatically brought to the user’s booking history. By clicking ‘My Details’ in the horizontal menu bar, it is possible to change the user’s details. It is this screen that is required if the administrator needs to re-set password etc. Please bear in mind that if the user is a GDP, it is mandatory for them to provide their performer list number.

Please remember to log out of the user’s account. You will then need to log back into the administrator account.

Authorise enrolment on this course

It is sometimes necessary to restrict enrolment, i.e. the delegate is not allowed to book themselves on a course — only Master Administrators can perform the enrolment. This is because some courses require a screening process. Once it has been agreed a certain delegate can attend the course, the administrator enters the course code into the field and clicks ‘Go’. This sends an email to the potential delegate advising them that they can now enrol on the course. The email contains a link which the delegate clicks. This link takes them to the course details page where the delegate enrolls as normal. It is advisable to contact the delegate by phone and/or letter that they have been approved to attend the course and to check their email account.

Book delegate on course

This option allows the Master Administrator to add a delegate to the course without going through the Netbanx payment process. The administrator enters the course code into the field and clicks ‘Go’. This enrolls the delegate onto the course. There is also an option for payment to be waived. If this option is chosen then the delegate does not have to pay. If this option is chosen, then the delegate can either phone the 1st Interactive call centre to pay by credit/debit card; or if agreed, then delegate can pay by cheque.

View Attendance History

This option allows the administrator to view the courses that the delegate is booked on or has booked on without having to log in as the user
**Modify a Record**
Delegates' details are obtained when they register on the website. If for some reason these details need to be changed, i.e. they originally incorrectly input their GDC number, an administrator can change details. It is advisable to use this function as this part of the system is unstable (it is still linked to the old system). Therefore in order to change details it is preferable to log in as the user and change their details using the ‘My details’ page.

**Facilities Management**

The Facilities Management function is linked to Locations Management. Facilities is the term used to name venues within locations, e.g. If the location is the John Radcliffe Hospital, then one of the facilities is the George Pickering Postgraduate Centre. Similarly, if the location is Kettering General Hospital, once of the locations is the Prince William Education Centre. The facilities do not have to be the whole venue, they can include just rooms e.g. George Pickering—Seminar Room 1.

**View all Facility Details**
There is the choice of viewing all the records or choosing a facility from the dropdown list and selecting ‘Get Record’. The information stored here includes

- Facility Name
- Location name
- Facility Location
- Address Line 1
- Address Line 2
- Town/City
- County/State
- Post/Zip Code
- HTML for map (e.g. gpick.html) - *This field is out of use
- Facility Attributes
- Facility Description - e.g. includes comments such as “main lecture room is 50m from dining room”
- Facility Telephone No
- Facility Email Address
- Max Facility Capacity
- Max Seating in Boardroom Layout
- Max Seating in Theatre Layout
- Facility Daily Rate

This information is stored so that the course co-ordinator can recommend facilities to tutors.

**Add a new Facility**
Click ‘Add a new Facility’. Fill in the details. However please note your facility must belong to a Course Location in the drop-down list. It is possible to choose more than one facility attribute. This is done by either highlighting a section of attributes or if the attributes are not grouped together, it is possible to choose by holding the control key on the keyboard and highlighting individual attributes.

**Add a new Facility Attribute**
If there is a new attribute that none of the other facilities have, then add it here

**Copy a Previous Facility**
Some venues have similar amenities. To save time use this function to copy an existing similar facility and make the necessary changes.

**Modify a Facility**
If the facility changes, choose this option to modify exiting facilities

**Delete a Facility**
Find out the record ID and enter into the field. This brings up the information regarding the facility. Click ‘Delete Now’ to confirm deletion

**Modify a Facility Attribute**
Scroll down the list of attributes and highlight the attribute that is to be deleted. Click Delete Now’
The Locations Management function is linked to Facilities Management. Location is the term given to the general location of facilities, e.g. the location 'The John Radcliffe Hospital hosts the facility 'the George Pickering Postgraduate Centre'.

View all Record
There is the choice of viewing all the records or choosing a facility from the dropdown list and selecting 'Get Re-

- Location Name
- Address Line 1
- Address Line 2
- Town/City
- County/State
- Post/Zip Code

Add a new Location
Click add a new location and fill in the relevant details in the fields (please see illustration below).

Please note you will need to advise the NESC Dental Office regarding additional locations because 1st Interactive Design Ltd will need to activate the location before any facilities can be added.

Modify a Location
Find the location you wish to change using the Get Record' function. Make the necessary changes and click 'Modify Now'.

Delete a Location
Find the location you wish to change using the Get Record' function. This will bring up the location information. Click 'Delete Now'.
Payments History Management

The information stored in this section is as follows:

- Netbanx Reference - given once a payment has been processed by Netbanx
- Amount Paid — cost of the course
- Course — course code
- Title — title of the course
- Date Booked [YYYYMMDD]
- Date Cancelled [YYYYMMDD]
- Cancellation Processed [YYYYMMDD]

Find a Record
This function allows the administrator to search for a payment record. The search criteria are as follows:

- Amount Paid
- Course
- Title
- Date Booked [YYYYMMDD]
- Date Cancelled [YYYYMMDD]
- Cancellation Processed [YYYYMMDD]

Just enable or disable the fields as necessary. The best search criteria for this is the search is ‘Course’

View all Records
Click this option to view all payment records

View a Record
Input the Netbanx Reference number and click ‘View Record’

Modify a Record
Input the Netbanx Reference number and click ‘Modify a Record’. This brings up the payment record. It is only possible to modify when the cancellation was processed. Please note the way the date is entered, e.g. 14th March 2008 would be 20080314.

Status Code Management

Each delegate is assigned a status code when they register. The status code is linked to the delegate’s job description e.g. a dentist has the status code ‘GDP’. This status code governs which information is required from the delegate., e.g. a dentist has to give both GDC number and NHS Performance list number whereas a Dental Nurse (status code = N) only has to inform the NESC Dental School of their GDC Number.

Find a Record
This function allows the administrator to search for a status code. The search criteria are as follows:

- Code (status code)
- Type* (there are three types: Dentist, Doctor, other Dental)
- Description

Enable or disable fields are required.

*Type. This refers to the mandatory information required from each job type. However this is cross referenced with the job description, e.g. although Dental Nurses are listed as ‘other Dental’, they do need to provide their GDC number.
- Dentist must provide GDC number and NHS performer list number.
- Doctor must provide their GMC number
- Other Dental do not have to provide either
View all Records
Click this option to view all status code records.

View a Record
Input ‘Code’.

Add a Record
The only fields that need to be filled are ‘Type’ and Description’. The status code is created using these details.

Modify a Record
If you wish to change either the Type or Description, click here

Delete a Record
Find the status code you wish to change using the Get Record’ function. This will bring up the status code information. Click ‘Delete Now’

Tutors Management

You may also notice when adding a course, that the drop-down list entitled ‘Course Tutor’ has a lot of names, many of which are the same. This is because tutors can run courses at different venue and each venue has its own administrator. The information entered here presents itself when looking at the course information page. There is a section which says ‘Enquiries’. In this section, there will be a name of the administrator and their contact details.

View all Records
Click this option to view all the tutor records.

View a Tutor
Choose a tutor from the drop-down list and click ‘Get Record’

Add a New Tutor

The following fields need to be filled:

- Tutor Reference Name — This is the name that appears in the drop-down list in ‘Add a New Course’. Please type in the name of the tutor plus some clue to the administrator details. This helps the person adding the course to the website to pick the correct tutor, e.g. ‘Shalin Mehra Regional Adviser’ has the contact details of Brenda Leach, whereas Shalin Mehra has the contact details of Sue Barrett.
- Tutor Display Name — This is the name which appears on the course information page. Just type in the course tutors name.
- Contact Name — Type in the administrator’s name
- Contact Telephone Number — Type in the administrator’s telephone number
- Contact Email Address — Type in the administrator’s email address
- Display Status—— choose ‘Yes’

Modify a Tutor
If you wish to change either any of the tutor’s details, type in the record ID (this can be found in the ‘View a Tutor’ section) and click ‘Modify a Tutor’.

Delete a Record
Find the tutor you wish to delete a tutor, by type in the record ID (this can be found in the ‘View a Tutor’ section) and click ‘Delete a Tutor’.
**Downloads**

This function is only used by Master Administrators based at the Triangle. This is because the downloads refer to downloading information into the Dental Access Database. This information contained in the downloads are then used to produce reports and/or for mail merges.

**Courses Including CPD hrs**

This option will give the user the choice of opening or saving the file (named calendar.csv). Choose Save and save to: F:/Shared/Sections/Dental/Database/New Registrations. Open the Access database (version 4 New NESC Access database050608 v4 located in F:\shared\sections\DENTAL\DATABASE) and click the button ‘Import + Replace New Course Details (calendar.csv)’.

This will download the course information from the website into the Access database.

**Delegate Attendance**

This option will give the user the choice of opening or saving the file (named delegates.csv). Choose Save and save to: F:/Shared/Sections/Dental/Database/New Registrations. Open the Access database (version 4 New NESC Access database050608 v4 located in F:\shared\sections\DENTAL\DATABASE) and click the button ‘Import + Replace Delegates Details (delegates.csv)’.

This will download the delegate (i.e. which delegates attended which course) information from the website into the Access database.

**Delegate DNA**

This option will give the user the choice of opening or saving the file (named delegatesDNA.csv). Choose Save and save to: F:/Shared/Sections/Dental/Database/New Registrations. Open the Access database (version 4 New NESC Access database050608 v4 located in F:\shared\sections\DENTAL\DATABASE) and click the button ‘Import + Replace Delegates DNA Details (delegatesDNA.csv)’.

This will download the delegates who did not attend courses on which they were enrolled from the website into the Access database.

**Dental Staff**

This option will give the user the choice of opening or saving the file (named staff.csv). Choose Save and save to: F:/Shared/Sections/Dental/Database/New Registrations. Open the Access database (version 4 New NESC Access database050608 v4 located in F:\shared\sections\DENTAL\DATABASE) and click the button ‘Create new DENTAL STAFF table with web input (staff.csv)’.

This will download the dental staff (i.e. user) information from the website into the Access database.

**Practices**

This option will give the user the choice of opening or saving the file (named practices.csv). Choose Save and save to: F:/Shared/Sections/Dental/Database/New Registrations. Open the Access database (version 4 New NESC Access database050608 v4 located in F:\shared\sections\DENTAL\DATABASE) and click the button ‘Create new PRACTICES table with web input (practices.csv)’.

This will download the practice information from the website into the Access database.
There are additional processes that the Master Administrator must be aware of such as how to deal with non-NHS General Dental Practitioners or how to deal with people who are having problems logging into their account.

**GDPs without an NHS Performer List Number**

Dentists without an NHS Performer List Number are dentists who do not work for the NHS. NESC provides courses for NHS dentists and in theory do not provide courses for non-NHS dentists. However in the interest of patient safety, it was decided that non-NHS dentists can book on NESC Dental courses so long as they pay an annual subscription fee of £100.00.

If a non-NHS dentist contacts you, please advise them to register as a 'non-NHS dentist'. They will be able to register online, except they will not have to input their NHS Performer List number. However when they first try to enrol on a course, the shopping cart facility will include the subscription fee. A non-NHS dentist will not be able to enrol on a course without paying their subscription first. The subscription lasts a year and the user will be automatically prompted for payment when it is due.
Delegate Without Internet Access

Check the course on which the delegate wants to enrol – i.e. make sure it is not full and that enrolments can be done online. Also you will need to note down the course code.

The delegate must be registered before they can enrol on a course. Therefore go to the medbook website (you will need to go to the general website (https://www.medbook.co.uk/cgi-bin/medbook/nesc.pl), i.e. not the admin site). Click the Register button.

Also open up the Excel spreadsheet:
F:\Shared\Sections\Dental\WEBSITE\ADMIN\Delegates without internet access–performer list–GDC numbers

Whilst on the phone to the delegate, ask their job description (if the delegate is a GDP, please see f:\shared\sections\dental\website\medbook admin\what to do with gdps who do not have an NHS performer list.doc). Choose the description from the dropdown list. Click OK

Then fill in all the delegate’s details.

As the delegate may get access to the internet in the future, please ask them to choose a username (if they can’t think of anything suggest ‘firstnamelastname’) and password – please note the username etc in the excel spreadsheet.

As the delegate does not have access to the website, they will not have their own email address. To overcome the problem of the mandatory unique email address requirement, please use the following email address (this is the only email address that can be accepted more than once)

offline@nesc.nhs.uk

DO NOT DIVULGE THIS EMAIL ADDRESS TO ANYONE OUTSIDE THE NESC DENTAL OFFICE

Once a delegate is registered, please remind them of their user name and also tell them the course code of the course on which they want to enrol (this is so the 1st Interactive call centre can find their details quickly and thus avoid lengthy phone calls and expensive phone bills) and then give them the following phone number: 09065 863466. Please advise the customer that the cost of this call is approximately 60 pence per minute (based on BT lines) depending on their service provider

The delegate will then phone the 1st interactive call centre and enrol on a course. Once a delegate is registered, an email will be sent to the offline@nesc.nhs.uk inbox. Write a letter to the delegate informing them of their username and password and which courses they are enrolled on. Please note on the spreadsheet when the letter was sent.

If they are already registered
Go to the Master Management Menu
Click Delegate Management
Search for Delegate
Log in as this user
Fill in details.

Continue as above
Occasionally delegates may have problems logging into their account. You will need to find out exactly why they cannot log in. It is advisable that the delegate is ready to access their (switched on) computer.

**Common reasons for log in problems:**

They are inputting their username and login incorrectly. Among the reasons for this error can be that the user has their ‘CAPS LOCK’ on or they are simply inputting the wrong username or password. Please ask the user if they have their CAPS locks on. If this is not the reason you will need to check their user name and password.

Go into the Master Management Menu. In Delegate Management (found under 'Record Management'), search for the delegate’s record. Click ‘Find Record’. This will bring up the find record screen. To search for a particular criteria, you must first click the ‘enable’ radio button. If the delegate is a dentist, the best way to search is by their GDC number. If the delegate is not a dentist or their GDC number has not been recorded for any reason, try searching by surname. Scroll to the bottom of the screen and click ‘Search now’. If the GDC record is searched, only one record should be returned. If a popular surname is searched then more than one record will be returned.

Once the record has been found, it is possible to log in as this user or to change data without logging in as the user. **Please be careful** with the last option as this is not fully integrated with the delegate database and may cause problems.

If you log in as the user, you will be taken to their booking history. Click on ‘My Details’. This will bring you to the delegate’s details screen. From here you can reset the user’s password—sometimes people get confused by the randomly generated password and need to reset the password by typing in the password in the password’s fields. Ask the user to try logging in again. If this does not work, please be patient, it may be that they are just typing in the wrong username — again check that they are typing it in correctly (i.e. no gaps between letters and numbers etc).

**Cancelling Delegates from Courses**

Occasionally delegates may wish to cancel from their course. Although they are supposed to cancel themselves, it is possible to cancel their place for them. To do this, go into the Master Management Menu. In Delegate Management (found under ‘Record Management’), search for the delegate’s record. Click ‘Find Record’. Once you find the record, choose the option ‘Log in as this user’. This will take you to their course bookings where you can cancel them from their course. Please remind the delegate that if the delegate cancels from their course within 28 days of the course running, then they will not receive a refund.
Add, Change or Delete VT Staff

This facility is used to add the new year’s VDPs into the VT database on their relevant scheme prior to 1 August start date.

The following data is input:

- Title
- First Name
- Initials
- Last Name
- Email Address
- Practice ID
- Telephone No.
- GDC Number
- Current Job Status (Dental Foundational Trainee)
- Location (VT scheme)
- VT year for this trainee

Once this information is in the database the day-releases can be added to the VT Course Diary and the VDPs will then be automatically enrolled on to their relevant scheme’s course (as opposed to having to enrol VDPs individually).

For joint days there is a facility to enrol more than one scheme onto that course.

***NB All VDPs must be added to the database prior to 1 August and before day-releases are added to the VT Course Diary.

Change a VT Course Date Only (NOT a VT Course)

This facility is used when a day-release has been added to the VT Course Diary but subsequently needs to be re-scheduled. However all other details remain the same i.e. speaker, scheme, venue etc..

The following procedure is required:

1. Add the newly scheduled VT course in the VT Course Diary (using the Add Similar button) changing the relevant information i.e. date and a new Course Code/Reference will be created.
2. In the VT section of the Master Management Menu go to ‘Change a VT Course Date Only (NOT a VT Course)’ and enter the old VT Course Code/Reference and enter the new VT Course Code/Reference. (NO emails will be sent to the VDPs booked on that course confirming the change of date – this is the opposite of normal courses where the attendees are advised of the new date of the course.)
3. Finally, delete the old course from the VT Course Diary.

This process has to be done because the confirmation reference numbers for enrolments use the Course Reference as the first part of the confirmation reference code for each booked person, so unless each booked person is given a new confirmation number, their booking will no longer tie up with the new course reference number.
Delete a VT Course

This facility is for deleting a VT course and those VDPs enrolled on it. (NO emails will be sent to the VDPs booked on that course confirming that the course has been cancelled – this is the opposite of normal courses where the attendees are advised of the new date of the course.)

View VT Course Diary & Add a VT Course

This facility is used to add the day-releases and will automatically enrol the relevant scheme’s VDPs onto that course.

Print a VT Course Pack

This facility will print out the following documents with the details of the course e.g. lecturer’s name already completed on the forms (as is used for normal courses):

- Register
- Evaluation Form
- Lecturer’s Self-Evaluation Form
- Lecturer’s Invoice
- FP84
# Appendix A — Course Code Prefixes

## Geographical Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>BA</td>
<td>Basingstoke</td>
</tr>
<tr>
<td>BE</td>
<td>Berkshire</td>
</tr>
<tr>
<td>BU</td>
<td>Buckinghamshire</td>
</tr>
<tr>
<td>IOW</td>
<td>Isle of Wight</td>
</tr>
<tr>
<td>NO</td>
<td>Northamptonshire</td>
</tr>
<tr>
<td>OX</td>
<td>Oxfordshire</td>
</tr>
<tr>
<td>PO</td>
<td>Portsmouth</td>
</tr>
<tr>
<td>SO</td>
<td>Southampton</td>
</tr>
<tr>
<td>WI</td>
<td>Winchester</td>
</tr>
</tbody>
</table>

## Non-Geographical Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS</td>
<td>Core Skills</td>
</tr>
<tr>
<td>EL</td>
<td>E-Learning</td>
</tr>
<tr>
<td>DNNET</td>
<td>Dental Nurse Blended Learning Scheme</td>
</tr>
<tr>
<td>GPT</td>
<td>General Professional Training</td>
</tr>
<tr>
<td>IN</td>
<td>Induction Courses</td>
</tr>
<tr>
<td>SPDC</td>
<td>Salaried Primary Dental Care</td>
</tr>
</tbody>
</table>
Appendix B—Course Booking Form

COURSE BOOKING FORM - “Section 63” Courses
(for online courses)
To be completed by the Dental CPD Tutor & Sent to the NESC Dental School Office for Approval

Tutor Name: *Tel. No: 
Email: *Fax No: 

Course Information

Course Title: ____________________________ Course Date: ____________

Is this a Multipart course? *Yes [ ] No [ ]
*If course is multipart, please fill out multipart table below

Venue: Date Venue Booked:

Course Administrator: *Tel: No:

Maximum Places: Minimum Places:
(Course Capacity) (Course to be cancelled if this number is not exceeded)

Course Start Time: Course Finish Time:

If Multipart Course – How Many Parts?

<table>
<thead>
<tr>
<th>Part 1</th>
<th>Part 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
<td>Date:</td>
</tr>
<tr>
<td>Venue:</td>
<td>Venue:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Part 3</th>
<th>Part 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
<td>Date:</td>
</tr>
<tr>
<td>Venue:</td>
<td>Venue:</td>
</tr>
</tbody>
</table>
Course Booking Form — Continued

### Course Content

**Course/Lecture Description:** This will appear on the website

*Please note this is the responsibility of the Tutors – not speakers*

---

**For whom is this course intended?** (e.g. GDPs, Dental Nurses, Entire Practice Team)

---

### Aims & Objectives: *(Course must have at least three of these)* This will appear on the website

<table>
<thead>
<tr>
<th>1st Aim/Objective</th>
<th>2nd Aim/Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3rd Aim/Objective</th>
<th>4th Aim/Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

### Course Subject *(please tick appropriate box)*

- Conference/study day
- Diagnosis & treatment planning
- Endodontics
- Orthodontics
- Radiology
- Paediatric dentistry
- Preventative Dentistry
- MFGDP
- Oral & Maxillofacial Surgery
- Practice Management
- Prosthodontics/implants
- Restorative
- Periodontology
- Core Skills
- E-Learning
- Special Care Dentistry
- Other Topic *(please specify)*

---

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Course Booking Form — Continued

*Programme – This will be used to award verifiable CDP Hours
You may attach your own programme if you wish (please ensure all times, including breaks, are accounted for)

<table>
<thead>
<tr>
<th>Time – please enter times as appropriate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration:</td>
</tr>
<tr>
<td>From:</td>
</tr>
<tr>
<td>From:</td>
</tr>
<tr>
<td>Break:</td>
</tr>
<tr>
<td>From:</td>
</tr>
<tr>
<td>From:</td>
</tr>
<tr>
<td>Lunch:</td>
</tr>
<tr>
<td>From:</td>
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<tr>
<td>From:</td>
</tr>
<tr>
<td>Break:</td>
</tr>
<tr>
<td>From:</td>
</tr>
<tr>
<td>From:</td>
</tr>
</tbody>
</table>

Equipment Requirements - Please check with speakers

<table>
<thead>
<tr>
<th>Projector</th>
<th>Yes</th>
<th>No</th>
<th>Computer</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

Other (please specify)

Equipment/Instrumentation for hands-on – Please enter details below. If there are any handouts, please give details (*this will be used to advise the skills centres*)

Equipment that attendees are required to bring on the day – Please enter details below

This will appear on the website
Course Booking Form — Continued

| SPEAKERS |
|------------------|------------------|

- **Speaker 1**
  - **Speaker 1 Name:** 
  - **Job Title:** 
  - **General Dental Practitioner?** Yes [ ] No [ ]
  - **Address for Correspondence & Payment:** 
    - **Postcode:** 
  - **Email:** 
  - **Telephone:** 
  - **Mobile:** 
  - **Hotel Required?** Yes [ ] No [ ]
  - **Maximum amount reimbursed = £108.00 per night**
    - Speakers book their own hotels but tutors can recommend hotels
  - **Lecture Fee (€72 per hour, €432 per day – maximum 6 hours)** 
  - **Loss of Practice Allowance (GDPS) - (€177.90 half session, €355.80 for whole day)** 
    - (This cannot be claimed for a session where the lecturer is receiving payment from the NHS as an employee)

<table>
<thead>
<tr>
<th>Travel – Car (24 pence per mile) from place of work</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
</tr>
<tr>
<td>-------</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel – OTHER (Standard Rail/Economy Air)</th>
</tr>
</thead>
<tbody>
<tr>
<td>From:</td>
</tr>
<tr>
<td>-------</td>
</tr>
</tbody>
</table>

- **Hotel**
  - **No. of Nights:** 
    - **Cost per night (max £108 per night)** 
      - **Total:** 
        - **£**

- **Subsistence** 
  - **£**

- **Other expenses e.g. materials, special instrumentation, special hand-outs.** 
  - **Please give details below**

- **Estimate of Total Fee Payable to Speaker 1** 
  - **£**

---

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This page is repeated four times
Appendices

Course Booking Form — Continued

Finance/Costings for Course

Bench Fee*: £

Refreshment Fee: £

*Bench fee of £20.00 standard for all hands-on courses to cover materials etc.

AT LEAST ONE OF THESE FIELDS MUST BE FILLED (please note, at present, there cannot be any courses with no fee)

*Enquiries to: 

Fee for Lecture Room/Skills Centre*: £

*CPD Hours Requested: 

Tutor’s Signature 

Date:

To be completed by NESC Dental School Office, Oxford

Course Category

☐ Sec 63

Approved by Dental School Director/Postgraduate Dental Dean

Date

Acknowledgement letter sent to speaker

Date

Date added to website

Comments

NESC Dental School Office
The Triangle, Roosevelt Drive
Headington, Oxford
OX3 7XP

Tel: 01865 740650
Fax: 01865 740639
Email: liz.hennessy@nesc.nhs.uk

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Appendix C — Postgraduate Centres

Aylesbury
Jenny Roberts—Postgraduate Centre Administrator
The Postgraduate Centre
Stoke Mandeville Hospital
Mandeville Road
Aylesbury
Buckinghamshire HP21 8AL

Tel: 01296 315421
Fax: 01296 315437
Email: jenny.roberts@smh.nhs.uk
Manager: Melita Smith
Email: melita.smith@smh.nhs.uk

Banbury
Liz Clarke — Manager
Terence Mortimer Postgraduate Centre
Horton Hospital
Oxford Road
Banbury
Oxfordshire OX16 9AL

Tel: 01295 229314
Fax: 01295 254437
Email: liz.clarke-pgec@orh.nhs.uk

Basingstoke
Sue Oliver — Course Organiser
Department of Learning, Development & Leadership
The ARK Centre
The Basingstoke & North Hampshire Hospital
Aldermaston Road
Basingstoke
RG24 9NA

T: 01256 313381
Sue.Oliver@bnhft.nhs.uk

Isle of Wight
Lyn Elderfield – Course Organiser
Postgraduate Medical Centre
St Mary’s Hospital
Newport
Isle of Wight, PO30 5TG

T: 01983 534231/534518
lyn.elderfield@iow.nhs.uk

Becky Leedham
rebecca.leedham@iow.nhs.uk
01983 534518

Trudie Little
trudie.little@iow.nhs.uk
01983 534518

Kettering
Sue Barrett—Centre Co-ordinator
Prince William Education Centre
Kettering General Hospital
Rothwell Road
KETTERING
NN16 8UZ

Tel: 01536 491184
Fax: 01536 492856
Manager: Anne Gaunt
Email: Anne.Gaunt@kgh.nhs.uk
Dental Administrator: Sue Barrett
Email: Sue.Barrett@kgh.nhs.uk

Milton Keynes
Marilyn Hopkins—Manager
The Postgraduate Centre
Milton Keynes General Hospital
Standing Way
Eaglestone
Milton Keynes
Buckinghamshire MK6 5LD

Tel: 01908 243178
Fax: 01908 234642
Email: marilyn.hopkins@mkgeneral.nhs.uk
Administration Officer: David Cobley
Tel: 01908 243821
Email: David.Cobley@mkhospital.nhs.uk

Northampton
Pat Hawkins—Manager
Cripps Postgraduate Centre
Northampton General Hospital
Cliftonville
Northampton
Northamptonshire NN1 5BD

Tel: 01604 545448
Fax: 01604 545590
Email: Pat.Hawkins@ngh.nhs.uk
Deputy Manager: Lindsey Howkins
Email: Lindsey.Howkins@ngh.nhs.uk
Appendices

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George Pickering Postgraduate Centre
The John Radcliffe Hospital
Headington
Oxford
Oxfordshire OX3 9DU

Tel: 01865 221739
Fax: 01865 220651
Email: Chantal.Vermenitch@orh.nhs.uk

Portsmouth
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Appendix D — Course Lifecycle

Lifecycle of Course – Planning Phase

Tutor plans programme

Tutor submits business plan for approval to Dean. Copied to postgraduate administrator

Approved?

Yes

Tutor liaises with speaker. Fill out 'Course Booking' form

Tutor /administrator sends 'Course Booking' form to Deanery for approval. Copied to administrator

Approved?

Yes

Deanery administrator sends confirmation letter sent out to speaker. Copied to Tutor & Administrator

Pre-course administration

No

Course Booking form returned to tutor for more information. Copied to administrator

Tutor submits business plan for approval to Dean. Copied to postgraduate administrator

November — February

6 months before date of course

Postgraduate Dean/Associate
Tutor/Postgraduate Centre Administrators
Deanery Office
Lifecycle of Course – Pre-course Administration

1 month before

Tutor/admin monitor course bookings monthly

Administrator books/orders catering

Administrator produces course pack and handouts

Administrator liaises with speaker re: amendments to requirements

Administrator/technician checks materials for hands-on courses

3 - 6 months before date of course

Dean/Associate approves course funding & CPD*

Deanery administrator inputs course costs onto spreadsheet

Deanery notifies postgrad administrator/tutor of course approval

Postgraduate Administrator puts course onto website

Postgraduate Administrator notifies tutor that the course is on the website

Course rescheduled. Notify Deanery administration and participants (by letter)

Yes

No

Reschedule Course?

Sufficient delegates to run course?

Yes

No

Tutor/Postgraduate Centre Administrator

Reschedule Course?

No

Course cancelled. Notify Deanery administration by email and participants (by letter)

No

Deanery master administrator refunds delegates via Netbanx

Yes

Tutor/Administrator

Dean/Associate

Appendices

“Via course booking form

Dean/Associate approves course funding & CPD*

Sufficient delegates to run course?

3 - 6 months before date of course

Postgraduate Administrator puts course onto website

Postgraduate Administrator notifies tutor that the course is on the website

Tutor/admin monitor course bookings monthly

Administrator books/orders catering

Administrator produces course pack and handouts

Administrator liaises with speaker re: amendments to requirements

Administrator/technician checks materials for hands-on courses

Deanery master administrator refunds delegates via Netbanx

Course cancelled. Notify Deanery administration by email and participants (by letter)

Yes

No

Reschedule Course?
Lifecycle of Course – Day of Course

1. **Tutor and Administrator meet to agree procedures for the day**

2. **Administrator registers participants**
3. **Tutor and Administrator sign FP84s and certificates (if applicable)**
4. **Administrator ensures catering etc is delivered**
5. **Administrator issues evaluation forms/certificates/FP84s**
6. **Administrator photocopies register and sends original to Deanery admin**
7. **Administrator collects and collates evaluation forms and sends to tutor**
8. **Administrator checks facilities are closed**

- **Tutor meets speaker to check everything is OK. Tutors liaise with administrator**
- **Tutor introduces speaker to delegates**

**Colors:**
- Postgraduate Dean/Associate
- Tutor/Postgraduate Centre Administrator
- Deanery Office
Lifecycle of Course – Post-Course Administration

- Postgraduate centre administration requests payment for speakers
- Postgraduate centre administration pays catering/equipment hire/materials
- Postgraduate centre administration notes costs on spreadsheet
- Deanery Administrator records CPD house on database
- Deanery Administrator records DNAs on database
- Tutors assesses collated evaluations forms
- Tutors write thank you letter to speakers.

Quarterly
Postgraduate centre administration invoices NESC Dental School for agreed amount*

* 25% of business plan and catering (with supporting information)