

Quality Procedure The Cpl Institute		
Title: Control of Training Services, Enquiries, Bookings & Scheduling - OGP		Reference: QP7-02-01
Version: 1.2	Date: 30/11/2020	Department: Quality
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Purpose:

This procedure ensures that The Cpl Institutes training services are properly managed, enquiries, bookings received by the company are adequately handled and scheduling completed in a prompt manner for all OGP Framework Clients.

This procedure ensures that enquiries received from OGP Framework Clients for training programmes in *Lot 6 - Display Screen Equipment (DSE) Assessor Training* or *Lot 10 - QQI Award Level 6 Manual Handling Instructor Training* are properly handled and that OGP Framework Clients are provided with pertinent information to ensure the booking process runs smoothly and recorded. That the OGP Framework Clients expectations are fully met.

Procedure:

1. Enquiries are received in a number of formats from OGP Framework Clients including telephone enquiries, email and website enquiries. The relevant Training Co-ordinator will provide the enquirer with the relevant information and advise enquirer ref The Cpl Institute website and URLs to download a *Notification to Activate Services Form (NASF)*.
2. OGP Framework Clients must complete, sign and submit a *Notification to Activate Services Form (NASF)*. These forms must be printed on Framework Client's headed paper.
3. Once the completed and signed *Notification to Activate Services Form (NASF)* is received, an account is created in Arlo and The Cpl Institute engages with the OGP Framework Client. Arlo is the new Booking and Scheduling system.
4. Training Co-ordinator will discuss requirements and then advises OGP Framework Client to proceed to The Cpl Institute website and click on URL to complete the relevant course booking form. <https://www.thecplinstitute.ie/ogp-booking-request/>
5. OGP Framework Client will be advised and offered depending on their requirements either: 'Intact' or 'Open Enrolment' Training Courses.
 - **Intact** = Participants in a given Training Course are from one Department / Public Service Body only
 - **Open Enrolment** = Participants in a given Training Course are from more than one Department / Public Service Body
6. All training requests will be acknowledged within two (2) working days by the Training Co-ordinator.
7. The Cpl Institute will provide accurate booking information and confirmation to the Framework Client in an email to the OGP Framework Client's contact person or booked by person as stated in the booking form.
8. OGP Framework Client's are to confirm receipt of training confirmation and the request for training services in writing. Courses are not considered confirmed until this email has been received from the booked by person.
9. Instructors are selected for course delivery by referral to the current list of approved instructors as per OGP tender submission. If another instructor is to be used, the instructor must meet the criteria and The Cpl Institute will seek approval from the OGP/Contracting Authority for this addition.
10. The Instructor is then contacted in writing, by the Training Coordinator, to confirm the training. If they are unable to carry out the training for requested dates, the Training Coordinator will find an alternative Instructor and ensure that the instructor is on the approved list.

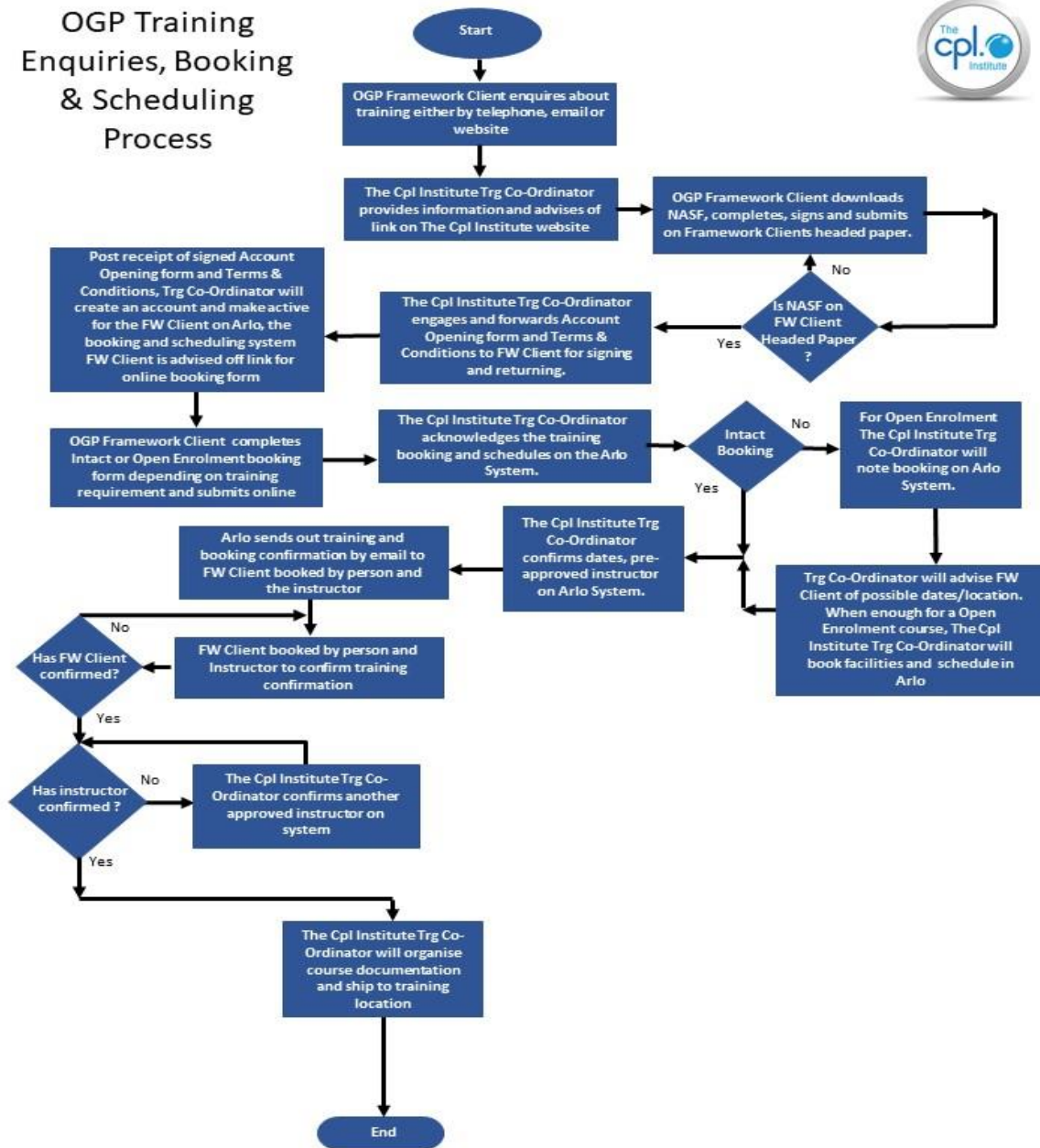
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11. The Cpl Institute will log the Framework Client's enquiries, requirements and course bookings on Arlo.
12. The Training Co-ordinator will set the Training Course up on the Arlo system. This generates a unique "Class number," which is used to identify this booking / course moving forward. Information such as the Organisation/Department name, course, dates, times, instructor, purchase order numbers and list of attendees are all entered onto the system. Post the course Training Co-ordinator will verify the names of all the participants on this class from the course sign in sheets, signed off by the instructor.
13. As soon as is practicable and closer to the training start date, the training co-ordinator will organise training material and course documentation, liaise with the instructor and training material is sent to the OGP Framework Clients site or location of training. Training material will also be available online for Framework Clients.
14. It is the responsibility of the instructor to ensure that they are prepared for each training course and that they have all necessary documentation and equipment before the commencement of a training course. It is also the responsibility of the instructor to ensure that they have the most recent version of all training presentations.
15. The Cpl Institute instructors will liaise directly with The Cpl Institute Training Co-ordinators throughout the process and escalate any issues if necessary, to The Cpl Institute Key Account Manager and the Training and Quality Manager.
16. The Cpl Institute will note and highlight bookings and potential attendance numbers, where participants from various Framework Clients can be formed and consolidated in Training groups in various locations nationwide.
17. Where a Training facility cannot be provided by the relevant Framework Clients, The Cpl Institute will provide the location and deliver the Training at a facility in nationwide footprint in Ireland which is geographical suitable to various Framework Clients.
18. It is noted by The Cpl Institute that the training group formation and participation for all 'Open Enrolment' courses, will be restricted exclusively for the OGP Framework Clients.
19. The minimum number of participants in a training group is five (5) for *Display Screen Equipment (DSE) Assessor Training* and *QQI Award Level 6 Manual Handling Instructor Training*, and the maximum number of participants is Six (6) for *Display Screen Equipment (DSE) Assessor Training* and twelve (12) for *QQI Award Level 6 Manual Handling Instructor Training*.
20. The Cpl Institute may be required from time to time to deliver Training in multiple locations nationally and concurrently provided number dictate and are adequate.
21. The Cpl Institute will ensure the lead time for the Training Course is a minimum of two (2) weeks and maximum of four (4) weeks, unless otherwise requested by the OGP Framework Client.
22. The Cpl Institute will note and capture the demand for courses and adjust frequency of courses to meet demand of OGP Framework Clients.

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OGP Enquiries, Bookings & Scheduling Process Flowchart

OGP Training Enquiries, Booking & Scheduling Process



Version 1.0 - Dec 2020

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Amendment History

Date	Version	Section	Reason	Amended By
10 th Dec 2020	1.1	Purpose and points 1, , 12, 13 & 15	Change wording post meeting with OGP on 4 th Dec 2020	Patrick Toye
20 th Jan 2021	1.2	Flowchart added	Flowchart added	Patrick Toye

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