

Endorsed Providers' Guide to the PD:Portal

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Introduction

Welcome to the PD:Portal!

Commonly referred to as the PDP, our training hub is designed to showcase your endorsed training and enables potential learners to:

- Find you easily – by keyword, region, discipline, or your training provider name
- Make an informed choice using the information you provide
- View a gallery of images
- Easily find the date and location of your training venue
- Book directly with you
- Leave a review (moderated by PD:Approval) and grade your training
- Follow you on Facebook, Twitter and Google+

Use this guide to help you navigate the system, it covers everything you need to do in step by step detail to create your pages.

Before you start, have a look at the training already on the PDP to see how the information and images are displayed, it will help you to make choices when you are uploading your own information.

HANDY HINT:

This guide will be updated as we receive feedback from all our users, so if you download your own copy you will be able to see from the version number in the footer at the bottom of the page to check you have the most up to date copy.

Although this is a comprehensive guide there may be times that you may want to talk through part of the process with someone who knows the system already, so the team is on hand to help you. If you require any support please contact the PDP Administrator at pdp@pdapproval.com or call 07803 355610 (limited hours so voicemail is available). You can also call the Professional Development Team on 0333 577 0908 in business hours.

Please note, we offer endorsement and accreditation depending on the products, so for the purpose of this guide, 'endorsement' covers both.

We hope you enjoy using the PDP and look forward to hearing your feedback.

The Team at PD:Approval

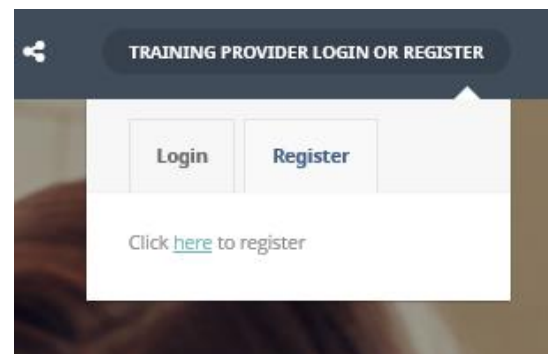
Section 1: Registration

1. Go to pdphub.com.
2. Click on **Training Provider Login or Registration** in the top righthand corner.
3. Select **Register** (if you already have login details, chose Login then go to Section 2 of this guide).
4. Create your own username – choose something generic like your company name as the username can't be changed - and add your email address. *NB: You can add two email addresses to your PDP account, the first one will receive all referrals or other emails from the PDP and from PD:Approval about anything to do with the PDP. The second one is only for referrals.*
5. Type the characters indicated then click on **Sign Up**.
6. You will receive an email confirming your registration and providing you with login details.

If you forget your password you can reset it on the Login tab.

If you don't get a password reset email, check your Junk folder!

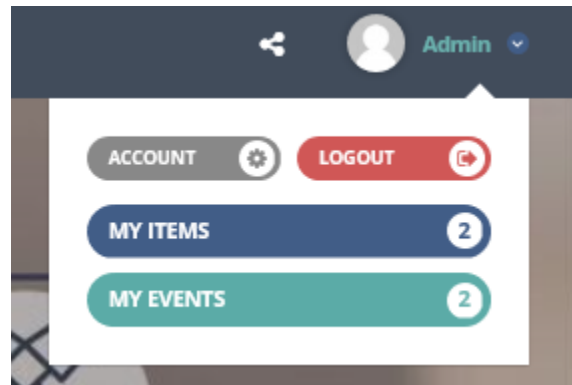
You can also change your password to something more memorable in your Profile Page once you are all signed up, but write it down before you press Update User as it will then be hidden.



Section 2: The Profile Page

Your first task once you have logged in will be to complete the information about yourself as a **training provider**. You will see your user name at the top of the page.

1. Click on your user name
2. Click on **Account**
3. The site will open on your **Profile** page, see below.

A screenshot of the PD:Approval Profile page. The page has a dark blue header with the 'EVENT GUIDE' logo on the left and 'View Site' and 'Log Out' links on the right. Below the header is a navigation bar with icons for 'Item Reviews', 'Training Providers', 'Courses', 'Media', and 'Profile'. A notification banner at the top says 'WordPress 5.2.3 is available! Please notify the site administrator.' The main content area is titled 'Profile' and contains a form with the following fields:

- Language: English (UK) (dropdown)
- Name: (empty)
- Username: pdapproval (text input, with note 'Usernames cannot be changed.')
- First Name: (empty)
- Last Name: (empty)
- Nickname (required): PD:Approval (text input)
- Display name publicly as: PD:Approval (dropdown)
- Contact Info:
 - Email (required): enquiries@pdapproval.com (text input)
 - "Interested in attending the training" form extra emails: referrals@pdapproval.com (text input)
- Website: (empty)
- About Yourself: (empty)

You only need to fill out a few areas here as the rest isn't public.

1. **Nickname:** Add the name of your organisation as you wish it to be displayed publicly
2. **Display name publicly as:** Your Nickname will appear in this list, so select it.
3. Further down the page you can generate a new password – make a note of it as once you press Update Profile it will disappear.
4. Ignore **Renew Account** as your account is free.

Section 3: Creating Your Training Provider page

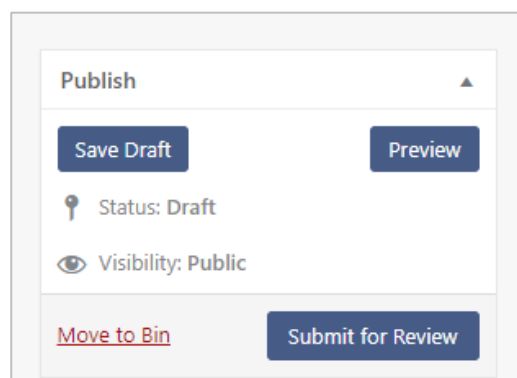
Move to the Training Providers tab at the top of the page and select **Add New** from the Dropdown list.

All the information you enter on the Training Provider page will be displayed on the public website. This page must be approved before you submit your training.

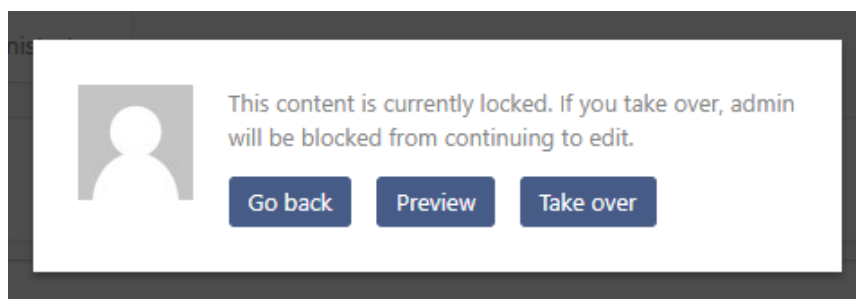
Lefthand side of page:

1. **Enter title here:** Add your training provider name, exactly as you provided to us.
2. **Main text box:** The large box below the title is where you describe your company – use it to persuade learners to choose you! Don't add details about your endorsed training as you will add that to your Course page.
3. **Excerpt:** this will be displayed under your training provider name so keep it short and to the point – one sentence will do. You can simply write 'REPs (or whichever your register is) recognised training provider'.
4. **Revolution Slider Options:** ignore.
5. **Company Logo:** Upload your logo here. We recommend using .png files without a background, with a maximum size of 200x200 pixels. This image will appear on your Training Provider page and at the bottom of all of your Course pages (next to your Training Provider contact details).
6. **Training Provider Options:**
 - a) **Training Provider Header:** always keep this as Map – it will display at the top of your public training provider page and pinpoint where your premises are.
7. **General:**
 - a) **Address:** Put in the full address of your organisation and click on Find. Don't add your company name as this might stop it finding the location.
 - b) **Telephone:** Add the telephone number available for enquiries.
 - c) **Additional telephone number:** you can specify as many numbers as you like and identify their purpose ie Sales 000 0000 0000, Enquiries: 000 0000 0000
 - d) **Email:** add the email address for enquiries
 - e) **Show Email:** always have as ON so your email address is always displayed
 - f) **Contact owner button:** Always have as ON so that the contact form can be used to get in touch
 - g) **Web:** Put in your website address.
 - h) **Web Link Label:** If you add text here, it will display instead of your email address but will be hyperlinked to it.
8. **Opening Hours:** you can choose to display opening hours if they are relevant. Simply add the times to the weekday boxes ie and switch Show to ON
9. **Social:** You can choose to either show or hide Social Media icons on your training provider page, and they will appear at the bottom on the left. Click on **Add New Item** to add your social media links:
 - **Image:** Ignore this
 - **Icon:** select the social media icon ie Facebook
 - **Icon color:** ignore
 - **Link:** put in the corresponding link to your social media
10. **Gallery:** This is where you can upload images to display in the Gallery section of your public pages:
 - a) Switch Show to ON
 - b) Select Add New Item

- c) **Title:** Add a title for the picture – this will appear when the cursor hovers over the picture on your public page
- d) **Image:** upload an image – we recommend landscape .png images of at least 800x400 pixels for quality, but it will also accommodate portrait images.
11. Scroll back up the screen, stopping on the way to complete the following areas on the righthand side of the page:
- a) **Training Provider Locations:** Select the country (England, Scotland, Wales, Northern Ireland, International) and the region for your **company head office**. This section is NOT for the locations you deliver in.
- b) **Membership Organisations:** If you are endorsed for recognition by one or more of our membership organisation partners select them here, otherwise just use the Sector box.
- c) **Sector:** Select your sector here.
- d) **Move up to the Publish box:**
- **Save Draft:** At any time you can save your page to return to it later. It will sit in your Training Provider folder, marked ‘– Draft’.
 - **Preview:** take a peek at what your page is going to look like at any point (it opens in a new tab so you don’t lose your editing page).
 - **Move to Bin:** if it’s all gone horribly wrong you can simply ‘bin’ the page. This removes it from your website but it can be retrieved by PD:Approval if you’ve done it in error. Move to Bin appears once you have saved the page.
 - **Submit for Review:** select this when you are happy with your page and want it to be reviewed to go live.
- e) Once your page is submitted it will be reviewed by the PDP Admin. Do not make any further changes until you hear from us – we will email you to let you know if this page has been approved or if you need to make any changes before approval.

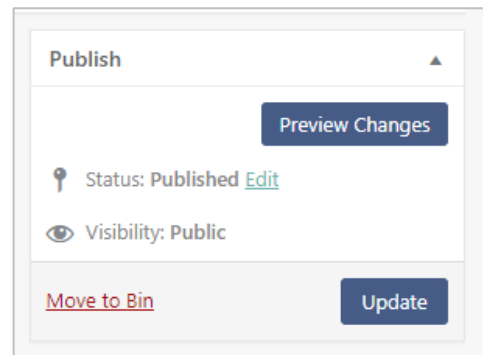


If you try to edit your page whilst the PDP Admin is reviewing it you will get the following message:



Click on **Go Back** and await an email from the PDP Admin.

Once approved, you will notice that the **Publishing** buttons have changed. Now your page has been published, you select **Update** to submit any new changes for evaluation.



Section 4: Creating your Course pages

Hover over the **Courses** tab when you login – you have the option to see a list of all the courses you have uploaded (All Courses), create a new course page (Add New), or see and update your list of venues (My Venues).

All Courses

This is where all your courses will be listed. You will also be able to see which ones are awaiting review (marked **Pending**) and which ones you have saved as drafts (marked **Draft**). If you want to have a course approved but not listed on the portal – for instance internal training for your staff only – you can request that the programme is marked **Private**. It will appear in your list of courses with Private next to it and will not be live on the site. Any other courses listed are live on the portal.

Venue list

The first thing you must do is list the addresses of all your venues on the 'My Venues' option in the Course dropdown list. This makes it easier when you are uploading dates for your course as you can select the venue quickly from this list.

Simply click on the Courses tab to make the dropdown list appear, select **My Venues**, then type each full postal address in the box in a line, one under the other. Ensure you put in the full address so it will show up on the map on your page, and enable your learners to use it for the GPS feature on the site.

Please list your course venues here, using a new line for each address, and provide the number/name, road, town, county and postcode. Please note that if your address is displayed incorrectly it will not be recognised for GPS coordinates and the map facility.

The Gym, The Street, The Town, UK RR1 2RR
The Venue, The Avenue, The City, UK CC1 2CC

Submit

You can add new venues when you are uploading your course details – there's a link to this list next to the area you type your venue address in (Dates section). Please note that you have to save your page (as Draft) before the new venue will appear for you to add to this section.

Create a new course entry

CPD: You can add new CPD for approval here if you have an **Unlimited** or **Bundle** endorsement. First upload relevant evidence to your Endorsement Dropbox by creating a folder with the name of the training in the New Endorsements folder and save the following:

- Assessed training: upload the lesson plan, learner manual and assessment
- Non-Assessed training: upload the lesson plan and learner manual
- Informal training: upload an overview of the training or timetable/schedule, and any marketing
- Event: upload the marketing materials

Online/Blended: If your new training is blended or online, please also provide login details so the PDP Administrator can sample the online content.

Qualifications: If you wish to upload a new qualification, check your Endorsement Dropbox to ensure it contains a letter of authority for that qualification from your awarding organisation – these are kept in the AO Approval folder. If not, save the letter of authority there so that the PDP Admin can check it when reviewing your PDP submission.

Foundation Training: Please add in your main text: *Foundation Training is the prerequisite for REPs Ireland members for any other CPD in the same discipline.*

For all other new endorsements, please contact the Professional Development team on 0333 577 0908 or enquiries@pdapproval.com for further details.

To create your new course page, start on the lefthand side of the page and work your way down.

1. Select **Add New**
2. **Enter title here:** ensure the name of your course is exactly how it is displayed either in your evaluation report or, if not already approved, as it appears in your marketing/website.

Qualifications: Always display qualification titles in the following way:

- **Level:** use an 'L' ie L2, L3 and put it at the beginning of the title
- **Name of qualification:** always use the same terminology as your Awarding Organisation (AO) or accrediting body
- **Do not** add the AO name to the title
- **Delivery method:** if blended or online delivery, put this at the very end.
- **Examples:** L2 Certificate in Gym Instructing – blended; L3 Pre and Post Natal - online

HE endorsed programmes

- Always display titles with the degree name ie BSc Hons Sports Science (L2 Gym, L3 PT, L3 ExRef)

3. **Text box:** This text box has been set up with mandatory fields - click under each heading and insert your text.
 - **Content:** What the learner can expect to gain from your training
(If Foundation Training for REPs Ireland or REPS India recognition, please add at the end of your content text: *Foundation Training is the prerequisite for REPs Ireland/India members for any other CPD in the same discipline*)

- **Prerequisite:** What qualification all members must have to undertake the training, and any other requirements you may have ie age limit, standard of English, other qualifications
 - **Assessment:** Assessment details if applicable, if not insert **NA** (not applicable)
 - **Awarding Organisation:** If it is a UK qualification add the name of the awarding organisation; if not insert **NA**.
4. **Excerpt:** this will be displayed under the title of your training when it appears in the search results (see the [Home page](#) for examples of existing training). Keep it short and to the point – two lines maximum as a brief indication of what the training is/will do.

If your CPD is online or blended, make sure you make it clear to potential learners by adding either **Online** or **Blended** at the end of your course title, and adding it in the main text. Qualifications on the REPs framework offered with an online element must be labelled **Blended Learning** and, if the Awarding Organisation specifies a practical assessment, must include as a minimum either at least one full day workshop to deliver the practical element of the qualification and an observed assessment or 20 hours work experience with a REPs professional in a gym setting with a portfolio of evidence signed off by the gym manager, verified at each stage by the training provider.

5. **Discussion:** Check 'Allow comments' to enable you to leave comments on your training provider page if a review is left, which will appear at the bottom of your Training Provider page as soon as you submit them. Comments can be made by anyone else, but are moderated by PD:Approval against the same criteria as Reviews. An email address is required so that the commenter receives a notification that their comment is published and/or answered.
6. **Company logo:** Your logo will appear in the search results on the home page (next to your Course title and Excerpt). To upload an image, click on Set Course Image, choose your image (upload it to the Media Library first) – we recommend a square .png image; there isn't a specific pixel size recommendation, it will accommodate any size.
7. **Custom Course Options:**
- a) **Total Learning Time:** enter the TLT for your training. This will help determine the CPD points your training will award. See [Appendix 1](#) for guidance in applying CPD points.
8. **Course Options**
- a) **Course header:** Whatever you select here (Image, Map, No Header) will appear at the top of the Course page ie the page the reader will reach when they select your training from the results page. You can select either **Image** or **Map** ('No Header' will result in just a blank space) – only select Map if you are scheduling some training, so that it will show the location of the venue where the training is taking place.
9. **Image Options** – use this if you have selected Image at 10a.
- a) **Header Image:** Upload an image – this can be a photo of a class in progress for instance, or something else related to your course – which will display at the top of your Course page (unless you specify Map in the options). The size of that area is 979 x 521 so the image should be the same proportions of width x height (aspect ratio 1.879).
10. **General**
- a) **Dates:** This area is used to publicise the dates a course is taking place on. You can use this for one or multiple dates, at one or more venues.

If your programme is **online** or **blended** where learners can enrol at any time and there is no specific start or end date, you can only add dates **four times a year** ie one each quarter, for each such programme. This is to provide you with a structure to ensure that your training is displayed on the home page regularly but without overloading the system. For qualifications, you can add dates and times of specific workshops, but they must have a venue and information in the Attendance Details box explaining clearly what they are for ie You must attend this day as part of the course.

Add your dates and venues

This section is for you to use once you have confirmed dates and venues in place.

- Click **Add New Item**

You can add a maximum of 25 current dates to any one programme at a time. As the dates pass they will be removed from the portal and you can then add more.

- **Date From:** Click on the Calendar icon to add the first date of the course – use the calendar to specify the day and the Hour/Minute sliders to specify the start time ie Monday 2 January 9.00am.

Once the start date passes, the details will disappear from the site. Unless you are setting more dates, you should then change the Header image to a picture (see 10)

- **Date To:** click on the Calendar icon to add the last date of the course – use the calendar to specify the day and the Hour/Minute sliders to specify the end time ie Monday 16 January 4.30pm.

If you are adding more than one set of dates, be aware that the dates will display on your course page in the order you add them to the portal. If they are in the wrong order, you can drag and drop them into order once you've saved them.

- **Venue:** add the address of the venue here from the dropdown list you have created
- **Venue Country:** Select the country so that training can be searched by country
- **Venue County:** Depending on the country you have selected, a list of counties will appear for you to pick from, so that potential learners can search by county
- **Show Venue on Map:** If your Course Header is Map, then select Yes.
- **Attendance details:** use this for brief instructions learners need to be aware of ie Please bring xxxxx

If the **Attendance Details** box is not populated with text, the box will be hidden on the public page. Instead of repeating the attendance details under every set of dates, you can type 'See Below' and only have it on the last date.

- **Show Venue on Map:** Select Yes so that your venues will show on a map on the course page.
- **Add Another Item:** use this if you are adding more dates and/or venues.
- **Use the Training Provider's Location:** this should always be no for a Course .

- **Address box:** don't put an address here as it will produce two maps on your page. Use this space instead to write: Use the geolocation box below, and then press Find

GENERAL

Dates
Create more inputs if event is recurring

Input

Date From
Starting date of event

1 January 2018 9:00 am

Date To
Ending date of event

15 January 2018 4:30 pm

Attendance Details

This is a 3 day course – you will be required to attend on 1, 8 and 15 January.

Example of an entry for a course running between 1 and 15 January as it will appear on the public page:

START: 1 January 2018
9:00 am

END: 15 January 2018
4:30 pm

ATTENDANCE DETAILS: This is a 3 day course – you will be required to attend on 1, 8 and 15 January.

Multiple dates at one venue

If for instance your course is 3 days long, but spread over a three week period ie 1-15 January, you have two options to display it on your training page:

- Start date is 1 January, end date is 15 January, with details of the dates to attend in the **Attendance Details** box.
- Alternatively, you can create Start/End Dates for each day – this is how it will look on the live site:

START: 1 January 2018 **9:00 am**

END: 1 January 2018 **4:00 pm**

START: 8 January 2018 **9:00 am**

END: 8 January 2018 **4:00 pm**

START: 15 January 2018 **9:00 am**

END: 15 January 2018 **4:00 pm**

ATTENDANCE DETAILS: You must attend each day; some pre-course reading is required

11. **Fee area:** Click on Add New Item to open this section. Here you add the following details:
 - a) **CPD Points:** ensure these reflect the learning hours. See [Appendix 1](#) for guidance on applying CPD points.
 - b) **Price:** Add your price (just numbers). If you leave this blank it will show POA (Price on Application) on the live page; if you put 0 it will show as FREE.

- c) **Ticket URL:** You can add a relevant hyperlink here i.e. to your booking page - remember to include the http at the beginning.
- d) **Course code:** leave empty for the PDP Admin to put in.
- e) **Qualification number:** please add the official qualification code for all accredited qualifications.

12. Approval Bodies

Your course page will always have the PD:Approval Endorsed logo uploaded as all training on the PD:Portal is endorsed first by us. To add any other of your approval logos, please put the approval email in your logo folder and then fill in the following:

- a. **Is Main PD Approval body:** ignore this as it relates to the PD:Approval logo already on your page
- b. **Name:** Put in the full name of the approval body
- c. **Logo:** Upload the logo to your media folder and add the link here.
- d. **CPD Points:** if this approval awards CPD points, add the number here.
- e. **Expiry Date:** this is the date that this particular approval (you must remember to update this when it is renewed otherwise the logo will disappear from your page)
- f. **Add New Item:** use this to add another approval body

13. **Currency:** if sterling type in pound and select Pound Sterling; otherwise select your currency.

14. **Training Provider:** Select your training provider name

15. **Use Training Provider's Location:** always No as this will be your Head Office address you added to your Training Provider page

16. **Address:** If you have added dates but only entered one venue for your training, put the address in here so that it is highlighted on the Map on the Course page (ensure you have selected Map as the Course Header). If you haven't added dates or have more than one venue, you can still use it for messaging:

- a) If you have added training at multiple venues, type in 'Contact the training provider for GPS details' instead of an address, remove the Longitude and Latitude coordinates and press FIND. The text will display on your public page when you save.
- b) If you have no training dates scheduled, type in 'Contact the training provider for dates and venues' and remove the coordinates as above.
- c) If your training is online, type in 'Contact the training provider for details', press Find and then remove the coordinates as above.

17. Fee Area

18. Add the CPD points

19. Price: add how much your course is

20. Scroll up the screen, stopping on the way to complete the following areas on the righthand side of the page

- a) **Post Attributes:** ignore
- b) **Online:** select this if it applies to your training
- c) **Blended:** select this if it applies to your training
- d) **Course Registers:** select the membership organisation you are recognised by.
- e) **Training Provider Locations:** Ignore on the Course page as this is for adding your location to your training provider page only.

- f) **Training Provider Categories and Disciplines:** These are separated into CPD, Higher Education, Industry Awards and Qualifications. Under each section is a list of disciplines – see [Appendix 2](#) for the full list. Select the category and then whichever discipline applies. Do not select disciplines from other categories as that will stop your training being found in a search.

Only qualifications on your membership organisation's entry framework can be tagged under the Qualification category. All other qualifications come under CPD.

- g) **Publish:** You have the following choices, but see the **Saving Your Page** section below before choosing:
- **Save Draft:** At any time you can save your page to return to it later. It will sit in your Courses folder, marked '– Draft'.
 - **Preview:** take a peek at what your page is going to look like at any point (it opens in a new tab so you don't lose your editing page).
 - **Move to Bin:** if it's all gone horribly wrong you can simply 'bin' the page. This removes it from your website but it can be retrieved by PD:Approval if you've done it in error.
 - **Submit for Review:** select this when you are happy with your new page and want it to be reviewed to go live.

There is no warning if you haven't filled in all of the information before submitting for review, so double check what you have entered before you submit it.

Once your page is submitted it will be reviewed. Do not make any further changes until you hear from PD:Approval – we will email you to let you know if this page has been approved or if you need to make any changes before approval.

Saving your page

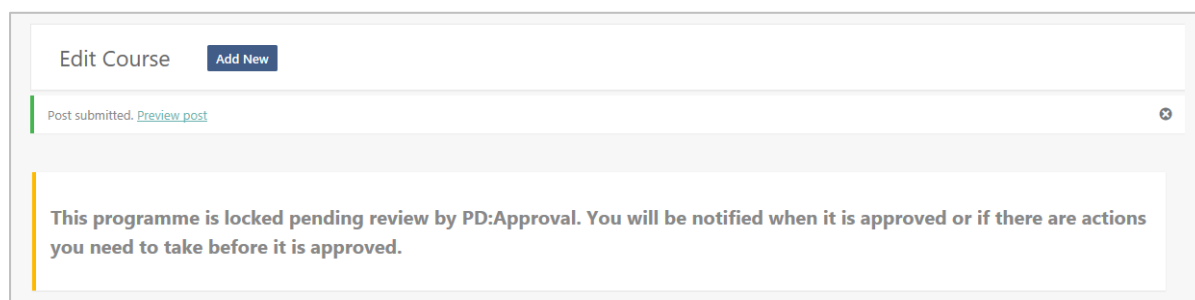
Before you Submit

Before you submit, you can save your page at any time with the **Save Draft** button – when you look in your list of courses under the Course tab you will see it clearly identified as **Draft**. You can go back to your page and edit it at any time in draft stage, using the **Save Draft** button each time to save your changes.

When you are ready to submit, use the **Submit for Review** button.

After you Submit

When you hit **Submit for Review** the following message will be displayed:



The screenshot shows a user interface for a course page. At the top, there are two buttons: 'Edit Course' and 'Add New'. Below these is a green notification bar that says 'Post submitted. [Preview post](#)'. Underneath that is a larger white box with a yellow border containing the text: 'This programme is locked pending review by PD:Approval. You will be notified when it is approved or if there are actions you need to take before it is approved.'

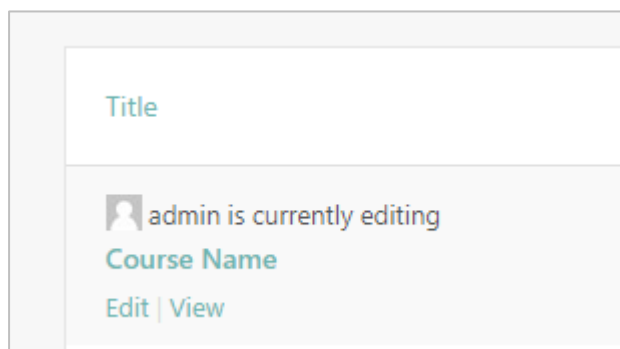
The course will be marked as **Pending** in your Course folder and if you try to edit it whilst it is with the PDP team, you will see the above message again.

The PDP Admin will receive your submission in their Pending folder – when they are viewing it, you will see ‘Admin is currently editing’ in your Course list.

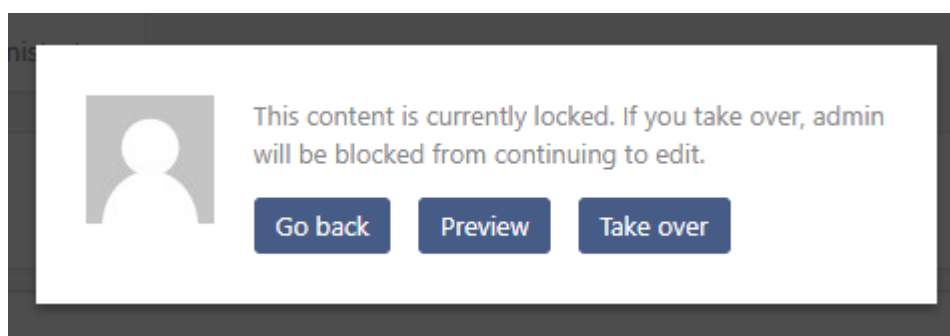
If you have your pending page open the PDP Admin will not be able to review it, so once you have submitted it, exit and leave it until you have notification that it has been reviewed.

Section 5: The Review

You will see when the PDP Admin is reviewing your training as it will say so in your folder:



If you try to edit your page whilst the PDP Admin is reviewing it you will get the following message:



Click on **Go Back** and await email instructions from the PDP Admin.

Not approved

If your course is not approved, you will receive an email from the PDP Administrator and your course will change from Pending to **Draft** in your folder.

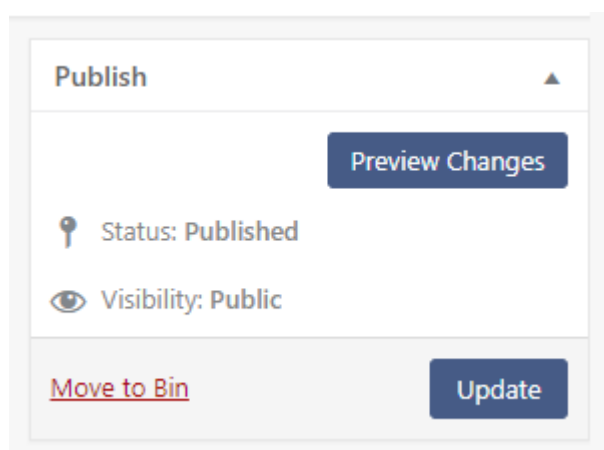
If you have submitted changes to an already *published* course, it will show as **Pending** until your changes are approved

Open the course and you will see an explanation in the Admin Notes box at the top right of your page with the actions you need to do to have your course approved.

Complete the actions and press **Submit for Review**. The course will now change from Draft to **Pending** again. This process will repeat until the PDP Administrator approves it.

Approved

You will receive an email telling you that your course has been approved and is live on the PDP. If you open your course to make more changes, you will notice that the **Publishing** buttons have now changed and you have an **Update** button.



Because your page has been published, you now select **Update** to submit any new changes for evaluation.

Submission Status

| | |
|----------------|-------------------------------------------------------------------------------|
| Draft | You haven't submitted it yet |
| Pending | The page has been submitted and action is required from the PDP Administrator |

Once reviewed, the PDP Admin will either **Publish** your page or **Save As Draft**, which means it is available for you to edit again and see the actions you need to take.

If your page is published, you will receive an email to let you know it is live on your site.

If once you have submitted the page it is then **saved as draft** again, you will receive an email to say that it hasn't been published and that you need to review the comments in the **Admin Notes** in your training, which will have actions you need to complete before the course can be published:

- Login to your account, open the training and view the comments in the box in the top righthand corner of the page.
- Complete the actions and resubmit.

Remember, when you first create your new course, you see a 'Submit for Review' button to send it to the PDP Admin. This button then changes to 'Update', which you will use to submit all future updates of that particular course.

Section 6: Keeping your Records Up to Date

Please regularly review your pages to ensure they reflect your current status.

Making changes

Changes to the general text

If you wish to make changes to your training provider or course pages (not the Title), simply edit as necessary and press Update. Your page will be locked until the PDP Administrator has reviewed it. As above, if you need to do anything before it is approved, you will find the details in the Admin Notes box.

Changes to the title of your training

Small changes can be made to the existing title which don't change the sense of it, for instance adding an apostrophe, using & instead of, but if you are renaming it or adding words such as 'intermediate' or 'advanced' you need to upload it as a new programme and your existing programme will be removed. This is so that the original title remains on the Members Area of the relevant register for learners who have completed it under the original title to log their points.

Temporarily removing training

If you wish to remove any training temporarily from public view you can request the PDP Administrator to mark it **Private** by emailing pdp@pdapproval.com. Your course will still remain in your Courses folder but with '- private' after the course name.

Deleting your training

If you wish to remove the training permanently, you can select **Move to Bin**. This will delete it permanently from your account.

Adding new training (Unlimited and Bundle providers)

If you have an Unlimited or Bundle endorsement, you can apply for approval of new training by adding the details to a new Course page in your account and submitting it for approval. You must also provide some evidence by uploading it to the New Endorsements folder in your Endorsement Dropbox, under a folder you create using the name of the training.

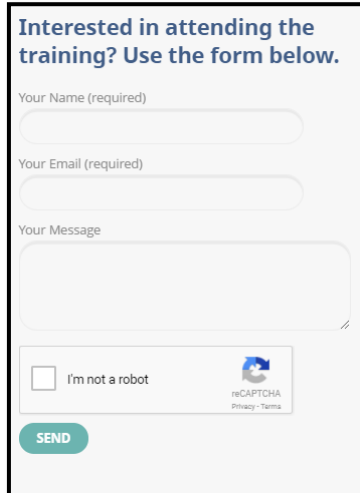
The evidence required depends on the level of endorsement you would like:

- Assessed (at least 8 hours with an assessment: Learner manual, lesson plans and assessment)
- Non-Assessed (at least 4 hours, no assessment): Learner manual and lesson plans
- Informal (1-3 hours, no assessment): Lesson plans and marketing
- Event: Marketing

To allocate the right amount of CPD points to your training, please refer to [Appendix 1](#).

Section 7: Messaging

PD:Portal visitors are able to communicate with you in 4 ways:



Interested in attending the training? Use the form below.

Your Name (required)

Your Email (required)

Your Message

I'm not a robot

reCAPTCHA
Privacy - Terms

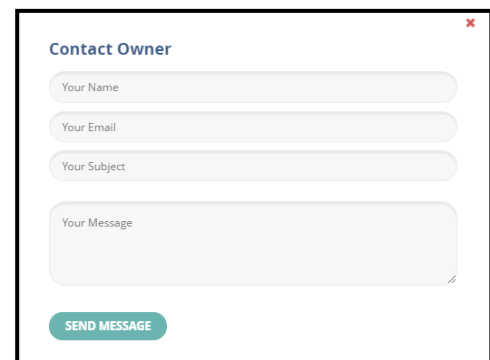
SEND

Interested in attending form

Every Course page will have a contact form for potential learners to express their interest in your training. You will receive this as a direct referral to your profile email address with their name and email, as well as any questions they may add to the message box.

Contact the owner form

If you activate the Contact form in the Training Provider page (Contact owner button), this will appear on your Training Provider page as a Contact Owner icon. This enables potential learners to send you a message with their name and email address.



Contact Owner

Your Name

Your Email

Your Subject

Your Message

SEND MESSAGE

Learner Reviews

Learners are able to leave reviews about your company or your training on your Course page, and leave a star rating. These will be submitted to the PDP Administrator to moderate against strict criteria which are listed in the FAQs. Once approved, you will receive an email to let you know that a new review is on your page. You can't reply in the Review field but, if you have activated Comments, you will be able to post a comment which will appear below the Review area.

Comments

If you activate the Comments field for your training, then the Comments area will appear at the bottom of your Training Provider page. Your comments are not reviewed and will be live as soon as you submit them. Comments can be made by anyone, but are moderated by PD:Approval against the same criteria as Reviews. An email address is required so that the commenter receives a notification that their comment is published and/or answered. You can also use this facility to reply to reviews or comments.

Section 8: Direct Marketing

The PD:Portal has attracted over 2,000 users to sign up to receive information about training directly to their inboxes. They have the option to either select news relating to the disciplines they are interested in or about everything.

To take advantage of this service, complete our [direct marketing application form](#) with the details of your training – special offers, new dates announced, new training launched – and we will invoice you with the fee of £25+VAT to send out an email to all those on our database who want to know about your particular training.

We will send out the mailshot within **ten working days** of payment being received, with a copy for you, but if you have a particular date you require it to be sent you can let us know on the form and we will do our best to accommodate you.

Section 9: Appendices

Appendix 1: Calculating CPD points

If your membership organisation requires their members to earn CPD points to maintain their membership, they will be awarded to endorsed training as follows:

CPD

- **Assessed:** 8-16 CPD points (must be at least 8 hours, have a mandatory assessment and be part mapped to NOS) – if online see the Online Assessed Programmes section.
- **Non-Assessed:** 4-7 CPD points (must be at least 4 hours, but no assessment or mapping requirement)
- **Informal:** 1-3 CPD points (short workshops, master classes, podcasts etc)
- **Event:** 1-2 CPD points
- **Foundation:** 16 CPD points

Points for CPD are based primarily on the learning hours of the programme. One hour is equivalent to one CPD point, up to a maximum of 16 points. Therefore if your programme has 7 learning hours, you can stipulate 7 CPD points. If your programme has 16 learning hours, you can stipulate 16 CPD points.

However, if your programme is 17 or more learning hours, you can still only award 16 CPD points.

Points awarded by endorsement type:

| Approval body | Assessed | Non-Assessed | Informal | Event | Foundation | Accredited | Industry Awards | Degree+ |
|---------------|----------|--------------|----------|-------|------------|------------------------|-----------------|---------|
| REPs Ireland | 8-16 | 4-7 | 1-3 | 1-2 | 16 | x | x | X |
| REPs UAE | x | x | x | x | NA | NA | NA | NA |
| STA | 8-16 | 4-7 | 1-3 | 1-2 | NA | 1-16 (not entry quals) | x | x |
| PD:Approval | x | x | x | x | NA | x | x | x |

Online programmes

If your programme is online and the assessment is not invigilated ie multiple choice questions, your programme will be endorsed as a Non-Assessed or Informal programme and can only have a maximum of 7 CPD points. If the assessment is invigilated or a case study and video, it can be endorsed as an Assessed programme and as such you can award the points relevant to the hours of training and the endorsement type (up to a maximum of 16).

Appendix 2: Adding dates for online and distance learning

If your programme is online or blended where learners can enrol at any time and there is no specific start or end date, you can only add dates **four times a year, ie once each quarter**, for each such programme. This is to provide a structure to ensure that your training is displayed on the home page regularly but without overloading the system.

Qualifications: You can add dates and times of specific workshops, but they must have a full venue address and information in the Attendance Details box explaining clearly what they are for ie You must attend this day as part of the online programme.

CPD: Add start and end dates, and in the Attendance Details box add: This programme is available to start at any time. For the Venue Address, ensure you have added Online to your address list so you can select it here.

To see how dates and venues are displayed, click on any of the programmes on the [Home page](#) displaying dates. The PDP is set up to display programmes with dates as the default on the Home page, so once you have added dates your training will move up the list so people can immediately see it when opening the portal to look for training.

Online qualification parameters

Any qualification that is on the Regulated Qualifications Framework (RQF) will be eligible for submission under your Accredited, Unlimited or Bundle endorsement for recognition, as long as the relevant letter of authority from the accrediting awarding organisation is provided.

In the case of online/blended qualifications, PD:Approval and REPs recognise and welcome the use of technology to help break down the barriers for learning. However, where the awarding organisation stipulates a requirement for a practical element, the qualification cannot be delivered 100% online.

The following parameters detail the minimum requirement for recognition of qualifications that require a practical and are delivered online:

Either:

At least one full day workshop to deliver the practical element of the qualification and an observed assessment

Or:

20 hours work experience with a REPs professional in a gym setting with a portfolio of evidence signed off by the gym manager, verified at each stage by the training provider.

Appendix 3: Categories and Disciplines

CPD

Aerial
Anatomy and Physiology
Ante/Post Natal
Aqua
Barre
Behaviour Change
Biomechanics
Bodyweight Suspension
Business and Marketing
Body Conditioning
Calisthenics
Cardio
HITT/HIT
Children's Fitness
Choreography
Circuit Training
Combat
Core Stability
Corrective Exercise
Equipment
Chair-Based Exercise
Event

First Aid
Fitness Testing
Flexibility
Functional Training
Golf
Group Indoor Cycling
Hypertrophy
Kettlebells
Management
Massage
Medical Conditions (SEI)
Meditation
Mindfulness
Mixed Martial Arts
Myofascial Release
Nutrition
Older Adults
Outdoor
Pad Work
Pilates
Plyometrics
Pole

Programme Design
Public Health and Policy
Reading
Rebound
Resistance Training
Rope Training
Rowing
Running
Sand Bags
Special Populations
Sports Conditioning
Sport Specific
Sports Injuries
Strength Training
Stress Management
Tai-chi
Technology
Walking
Weight Training
Well-being
Yoga

Higher Education

Aqua (HE)
Cancer Rehabilitation (HE)
Cardiac Disease (HE)
Chronic Respiratory Disease (HE)
Exercise Referral (HE)

Exercise to Music (HE)
Falls Prevention (HE)
Gym (HE)
Long-Term Neurological Disease (HE)
Mental Health (HE)

Obesity and Diabetes (HE)
Older Adults (HE)
Lower Back Pain (HE)
Personal Trainer (HE)
Strength and Conditioning (HE)
Stroke (HE)

Industry Awards

Cancer Rehabilitation
Cardiac Disease
Chronic Respiratory Disease
Falls Prevention

Long-Term Neurological Disease
Mental Health
Obesity and Diabetes

Lower Back Pain
Strength and Conditioning
Stroke

Qualifications

Accelerated Rehabilitation
Ante/Post Natal
Aqua
Assessor
Cancer Rehabilitation
Cardiac Disease
Chronic Respiratory Disease
Disability
Exercise Referral
Exercise to Music
Exercise, Movement and Dance

Falls Prevention
Fitness Manager
Gym
Internal Quality Assurance
Long-Term Neurological Disease
Lower Back Pain
Mental Health
Obesity and Diabetes
Older Adults
Personal Trainer
Physical Activity for Children

Physical Activity Instructor (Resistance)
Physical Activity Instructor (Walking)
Pilates
Strength and Conditioning
Stroke
Tutor
Yoga