

Course Authorisation & Results Submission

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Course Authorisation

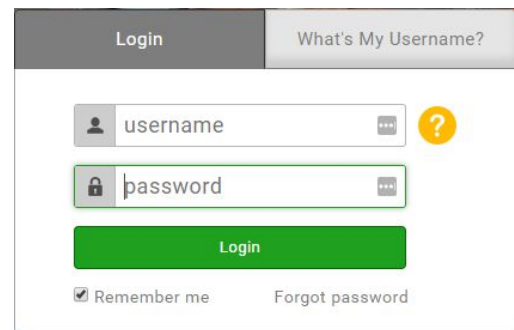
Getting Started

1. Sign in to your membership record by clicking Portal located on the top right of the canoescotland.org Website.

2. Log in to the portal using your username and password.

TIP: You can find out your username and reset your password on this screen too.

TIP: Your username is usually your membership number.



Login

What's My Username?

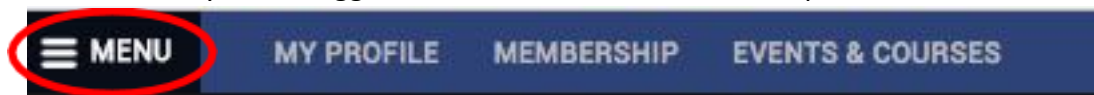
username

password

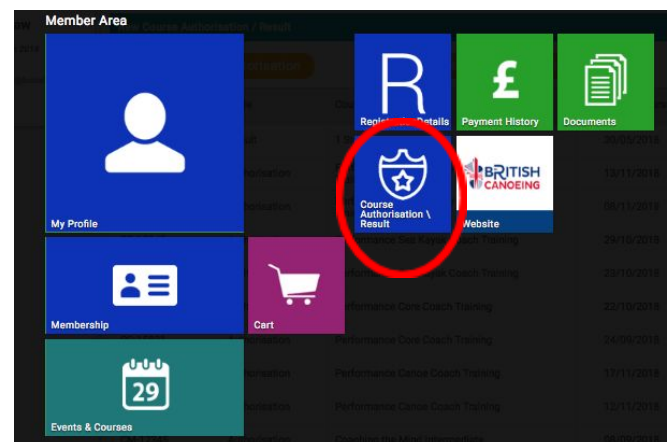
Login

☐ Remember me [Forgot password](#)

3. When you are logged in, click the **Menu** tab at the top of the screen.



4. Within the **Member Area** Select the **Course Authorisation \ Result** tab in the menu.



5. Once on the Course Dashboard, you can see all of your Courses, start new authorisation requests, submit course results etc.

New Course Authorisation / Result						
New Course Authorisation			New Course Results			
Authorisation Number	State	Course	Date of Course	End Date	Status	Edit/Submit
000717	Result	1 Star	30/05/2018	30/05/2018	Complete	
PC-15843	Authorisation	Performance White Water Kayak Coach Training	13/11/2018	14/11/2018	Authorised	
PC-15837	Authorisation	Performance White Water Kayak Coach Training	08/11/2018	09/11/2018	Authorised	
PC-15842	Authorisation	Performance Sea Kayak Coach Training	29/10/2018	30/10/2018	Authorised	
PC-15840	Authorisation	Performance Sea Kayak Coach Training	23/10/2018	24/10/2018	Authorised	
PC-15835	Authorisation	Performance Core Coach Training	22/10/2018	24/10/2018	Authorised	
PC-15831	Authorisation	Performance Core Coach Training	24/09/2018	26/09/2018	Authorised	
PC-15836	Authorisation	Performance Canoe Coach Training	17/11/2018	18/11/2018	Authorised	

In the next section we get to grips with the Course Dashboard.

Course Dashboard

New Course Authorisation

- Used to start a new a new course authorisation.

New Course Results

- Used to submit a set of course results where the course does not require authorisation or advertising.
- This part of the system is dealt with in a separate help file and video.

New Course Authorisation / Result						
New Course Authorisation			New Course Results			
Authorisation Number	State	Course	Date of Course	End Date	Status	Edit/Submit
000825	Authorisation	British Canoeing Wild Water Racing Coach Training	29/06/2018	29/06/2018	Awaiting Approval	
000717	Result	1 Star	30/05/2018	30/05/2018	Complete	
PC-15843	Result	Performance White Water Kayak Coach Training	13/11/2018	14/11/2018	Authorised	
PC-15837	Result	Performance White Water Kayak Coach Training	08/11/2018	09/11/2018	Authorised	
PC-15842	Result	Performance Sea Kayak Coach Training	29/10/2018	30/10/2018	Authorised	
PC-15840	Result	Performance Sea Kayak Coach Training	23/10/2018	24/10/2018	Authorised	
PC-15835	Result	Performance Core Coach Training	22/10/2018	24/10/2018	Authorised	

Course Overview

- This is a record of all courses, they are listed in the order requested with newest courses at the top.
- The Edit/ Submit button allows you to go back in to a course and make amendments and submit candidate results.

States and Status Explained

States

Authorisation = This state is a course authorisation, this shows that a course has not yet had results attached to it, course show this state whether they are authorised or not.

Result = this is a course that has candidate results attached to it.

Status

Awaiting Approval = this is a course authorisation that you have submitted that could not be automatically approved, this could be for a variety of reasons:

- A staff member is not an SCA Member, this means a check has to be made with their home nation.
- Your own record is not passing the authorisation checks e.g First Aid Expired.
- The course has been randomly selected for internal verification.

TIP: to reduce instances of course going in to the 'awaiting approval' ensure you records are fully up to date before requesting course authorisation.

Authorised = this course has been authorised and is awaiting results.

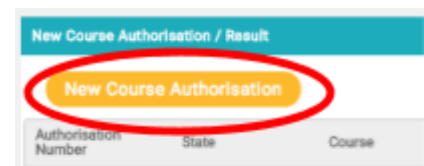
Complete = this course is complete, payment has been made and the provider has provided all of the required information for certification to be made.

TIP: at each stage of the authorisation process providers will receive emails, notifying them of the state and status of approval applications, please ensure the email address on your membership record is correct as this is used by the system for provider emails not the email address supplied for booking enquiries.


New Course Authorisation

To start a new Course Authorisation:

1. Click the **New Course Authorisation** Button.
2. Select the **Category** of Course you wish to organise, by selecting the drop-down menu and selecting the category



TIP: courses are categorised in the same format as our website categories and **My Pathway** tool.

Category: 

Course: *

Start Date: *

End Date: *

Course Location line 1 : *

*


*

*

*

*

*

Course: 

TIP: some of our **EVENTS** lists are quite long you can navigate by using the **search bar**, **arrow** buttons or reorganise the event titles alphabetically by clicking the grey **Event Name** box.

4. Once you have selected the course you wish to organise you can confirm the logistics. All fields are mandatory.
 - a. Start date and end date must be entered for 1-day courses please use the same date in each field.

EVENTS

Event Name	Select
Advanced Surf Safety and Rescue	<input checked="" type="checkbox"/>
Advanced White Water Safety and Rescue	<input checked="" type="checkbox"/>
Foundation Safety and Rescue Training	<input checked="" type="checkbox"/>
Open Water Navigation + Tidal Planning	<input checked="" type="checkbox"/>
Coastal Navigation and Tidal Planning	<input checked="" type="checkbox"/>
White Water Safety and Rescue	<input checked="" type="checkbox"/>
Foundation Safety and Rescue Training (Bank Based)	<input checked="" type="checkbox"/>

Page: 1 of 1

Displaying 1-7 of 7

- b. For modular courses please list the first module as the start date and the last module as the end date.
- c. The course location should be fully completed, in the case of a course venue with a short address the word **NULL** should be entered.
- d. Lat/long is generated automatically, however if you need to you can override the lat/ long by entering your own.
- e. Phone numbers and email addresses entered on this page will be shown on the SCA Website (if selected) this can be your own or a third party. Any provider matters will be sent to you/ your membership email.
- f. Courses will only appear on the **canoe near you** map if this box is selected and the course have been authorised.

Start Date: *

End Date: *

Course Location line 1 : * Course Location line 2: *

Town: * County: *

Postcode: * Country: *

Lat/Long: * Phone Number: *

Email Address for Enquires: *

Website: *

Advertise on Website: ☐ ☐

TIP: If you do not plan to have your course advertised you can type NULL in to the **phone, email and website sections** – However it is really important to note that courses will not be advertised without a Lat/Long, for courses **outside of the UK** it is essential that you check the Lat /Long generated by the address and override it if necessary.

Once you're happy with your course details you can click **Next** to move to the staff screen.

Course Staff

Once you are in the Staff page you will find that your details have been automatically added to the course and your membership record checked to ensure you meet the criteria to run the course. (this is displayed as verified)

If you Fail the pre rec check, this doesn't stop you being able to submit your request, it just means your course will be manually checked by SCA Staff.

If you are the only staff member you are able at this stage to click next and move to the final screen.

Adding other Staff Members

The process of adding other staff to the course is the same for both SCA Members and Members of British Canoeing (England), CW and CANI.

5. Select **add SCA Member** or **Add Other Home Nation Provider**.
6. Complete the personal details of the staff member. Selecting their role from the drop-down menu:

New Course Authorisation / Result

Back to Summary

Course Information

Staff

Submit

Staff Details

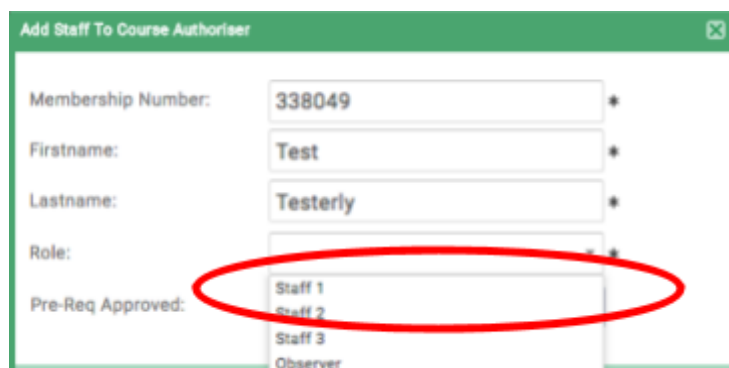
Add British Canoeing Provider Add Other Home Nation Provider Remove

Membership Number	First Name	Surname	Pre-Req Approved	Role
69417	Darryll	Shaw	Verified	Staff 1

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Displaying 1 of 1

- Staff 1 is the course lead, this is your role
- Staff 2 & 3 are supporting staff role e.g 2nd assessor, tutor – the system checks that they are eligible to fulfil that role.
- Observer – an aspirant provider.
- Click Save



Staff Members must be added at the time of submitting a request, observers can be added at any point up until the course is complete, once the course is complete any adding of observers is not recorded. Other home nation providers will always fail pre requisite checks as we are not able to access other home nation databases, however the course request can be completed and the providers details will be checked manually within two working days.

TIP: if you need to change the staffing of a course you can use the remove button, once the course has been submitted staff changes cannot be made by the provider, these requests need to be sent to office@canoescotland.org
Click **next** to complete your course request

Declaration

To complete the course authorisation request you need to read and agree to the Provider Service Agreement and Data Processing Agreement and click **submit**.

You will now return to the Course Dashboard and you will be able to check the status of your authorisation, you will also be sent an automatic email stating the course details and next steps (if required).

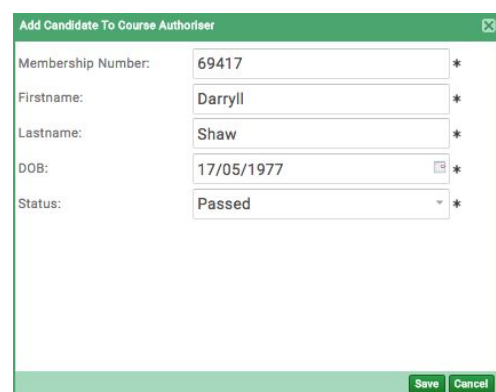
Course Cancellations and Mistakes

Once a course has been submitted any changes to staffing or changes of venue details needs to be carried out by SCA, these should be emailed to office@canoescotland.org detailing the course authorisation number and the issue to be resolved.
Issue must be resolved prior to candidate's submission and payment being made.

Submitting Candidate Results

During the course the provider should collect appropriate candidate information, paper-based course schedules are fine for this purpose of the providers own booking mechanism.

Once the course is complete and the provider is ready to submit the course results, the provider should log in to their membership record and return to the course dashboard,

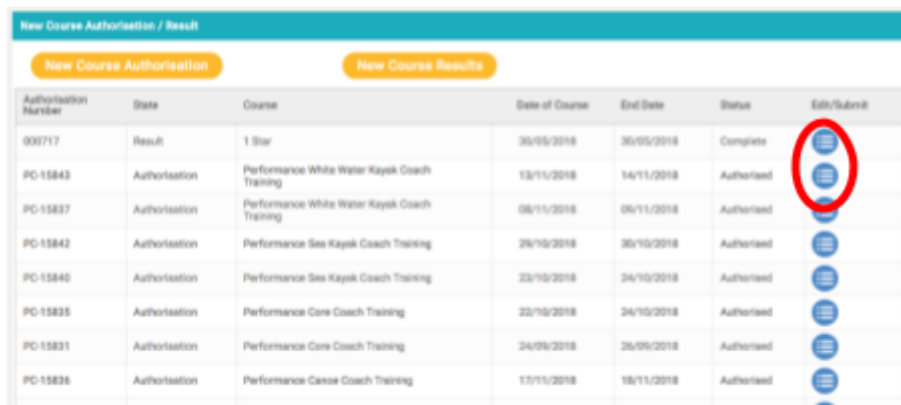










once you have located the course you wish to submit candidates against you click on the blue **edit/ Submit** Circle.

This will open the course at the candidate's page.

I'

TIP: It is essential at this stage to go back to the staff page and add any additional staff or observers, failure to do so at this stage will create issues for observers when their logbooks are audited, it also may cause you issues as you will only be able to submit the appropriate number of candidates per staff member.



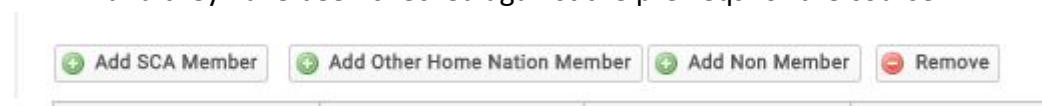
Authorisation Number	State	Course	Date of Course	End Date	Status	Edit/Submit
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PC-15842	Authorisation	Performance Sea Kayak Coach Training	26/10/2018	26/10/2018	Authorised	
PC-15840	Authorisation	Performance Sea Kayak Coach Training	23/10/2018	24/10/2018	Authorised	
PC-15835	Authorisation	Performance Canoe Coach Training	22/10/2018	24/10/2018	Authorised	
PC-15831	Authorisation	Performance Canoe Coach Training	24/09/2018	25/09/2018	Authorised	
PC-15836	Authorisation	Performance Canoe Coach Training	17/11/2018	18/11/2018	Authorised	

Adding candidates is similar to adding Staff:

You need to select the appropriate button for each candidate's personal situation, looking at a SCA member first:

Once you have selected **Add SCA Member** a new window will open:

1. Add the personal details of the candidate including date of birth in the DD/MM/YYYY format.
2. Complete the drop-down status as **passed** or **failed**
3. **Click Save**
4. You will return to the candidate's screen and see that the candidate has been added and they have been checked against the pre-reqs for the course.



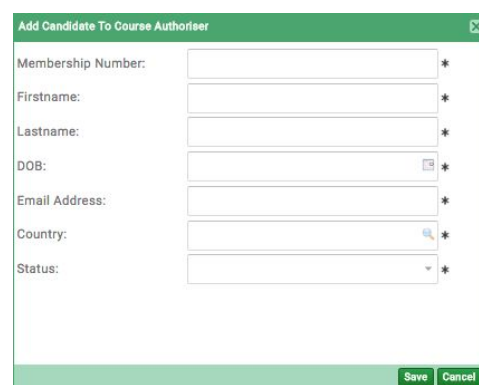
TIP: SCA members must be added as members even if their membership is expired.

TIP: Failure to pass pre-reqs will not prevent you submitting a course but will mean a manual check will need to take place.

5. For Other Home Nation Members, the number of questions asked increases and it is imperative that you add the prefix CW, SCA or CANI at the start of the membership number.

TIP: Other Home Nation Members and non-members will not automatically pass pre-reqs checks, these courses will be manually checked by SCA.

6. For Non-Members please complete all sections.



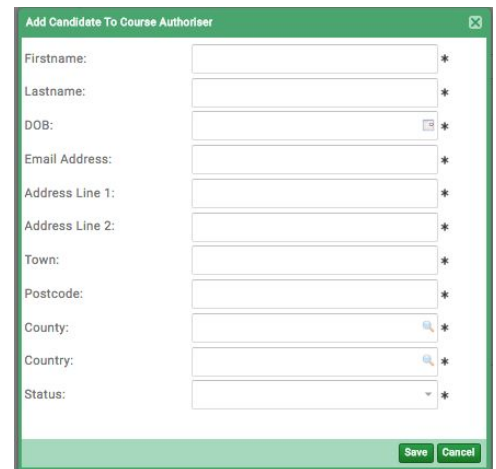
TIP: Non-members may have done many courses in the past and as such they may have an SCA record number that they are not aware of, this number is sent to them in confirmation emails when they attend courses, if the system indicates that some one has a record you must contact us to confirm the non-active record, we will require Name, DOB, Email address or residential address to confirm a record number, this can be via email to coaching@britishcanoeing.org.uk or by contacting us during business hours over the phone.

Adding Notes

Once you have added your candidates the final section to complete is the notes section, this should include:

- Reasons a candidate was differed or failed
- Any conflicts of interest and how they were managed
- Any reasonable adjustments made.

Once the course candidates and notes have been submitted you can click **next** and proceed to payment.



The screenshot shows a web form titled "Add Candidate To Course Authoriser". It contains several input fields, each followed by an asterisk (*) indicating it is a required field. The fields are: Firstname, Lastname, DOB (with a calendar icon), Email Address, Address Line 1, Address Line 2, Town, Postcode, County (with a search icon), Country (with a search icon), and Status (a dropdown menu). At the bottom right of the form are two buttons: "Save" and "Cancel".

Payment

The payment screen gives you the option to pay by: debit/ credit card or direct debit - in this circumstance the Debit is a single transaction and doesn't set up a recurring payment (only membership sets up a recurring payment)

To pay by Debit/Credit Card:

1. Check the cart page, ensure that all candidates are showing and that the fees are correct. – The system checks that candidates are current members; member discounts are only applied if this check is successful.
2. Fees quoted in the body of the invoice are less VAT, Vat added as part of the summary of the invoice. If there are any issues with the payment totals either get the candidates to renew membership or contact us at office@canoescotland.org Do not process a payment that is not correct.

Checkout
Review and purchase items

1 Confirm Details

2 Order Review

3 Confirm Payment

Below is a summary of your order, please review and then select a payment option.

Contact Details
Andy Murray
Caledonia House
1 Redheughs Rigg
South Gyle
Edinburgh
EH12 9DQ
andy.murray@canoescotland.org
555

[Request Invoice](#) [Admin Pay](#) [Pay Via Direct Debit](#) [Pay with Card](#)

Item Summary

ITEMS	PRICE	QTY	TOTAL
Leadership Course fee (Test Member) Leadership Course fee In Stock	£10.00	1	£10.00
Leadership Course fee (Joe Paddler) Leadership Course fee In Stock	£10.00	1	£10.00
Leadership Course fee (Any Paddler) Leadership Course fee In Stock Remove	£10.00	1	£10.00

[Update](#)

Sub Total
Total

£30.00
£30.00

[Back](#) [Request Invoice](#) [Admin Pay](#) [Pay Via Direct Debit](#) [Pay with Card](#)

3. Click pay with card, enter your card details when prompted
4. Whilst the payment is processed do not click back or refresh.
5. You will automatically be sent a receipt by email, however on the payment

Card number

MM/YY

CVC

Pay £5.00

successful screen you can also download a PDF receipt.



To pay by Invoice

1. Check the cart, ensure that all candidates are showing and that the fees are correct.
– The system checks that candidates are current members; member discounts are only applied if this check is successful.


Darryll Shaw
1 Oxford Road
Princethorpe
RUGBY
Warwickshire
CV23 9PS
darryll.shaw@britishcanoeing.org.uk
447595517630

Item Summary

1 Account Details

2 Confirm Direct Debit

VISA DISCOVER Mastercard


ITEMS	PRICE	QTY	TOTAL
 <div>Provider Fee (Darryll Shaw) Provider Fee In Stock Remove</div>	£4.17	1	£4.17

Update

Sub Total£4.17

VAT£0.83

Total£5.00



2. If there are any issues with the payment totals either get the candidates to renew membership or contact us at office@canoescotland.org Do not process a payment that is not correct.
1. If you wish to raise an invoice for bank payment, select the invoice option and enter the details. An invoice will be emailed instantly.
3. Whilst the payment is processed do not click back or refresh.
4. You will automatically be sent an invoice by email.

Course Cancellations and Mistakes

Once a course has been submitted any changes to staffing or changes of venue details needs to be carried out by SCA, these should be emailed to office@canoescotland.org detailing the course authorisation number and the issue to be resolved.

- 1.