

## How to book one of your team members onto training

As a Booking Coordinator/ Manager on MLE you have the ability to book a team members training.

Login and click **'Search'**

Search by typing the course title or a key word. Alternatively, select a course group from the tiled options.

**Please Note:** when searching for a course, using quotation marks will make searching easier and limit the search to more specific words or phrases. E.g. Searching "Information Governance" will ensure that only courses with those 2 words together in that order will appear. Without the quotations the search will return any course where it finds the word 'Governance' and/or 'information'

When the course appears click the course title to bring up dates

Search by date, or on the right of the outline, filter by the location/date or distance.

Choose a suitable date/venue and click on the option: Book

This will then load a screen confirming the Event Details and select whether to book yourself or someone else. For your team, select 'I want to make a purchase for someone else.'

Please choose from the following list how you would like to make this purchase:

I would like to make this purchase for myself.

I want to make a purchase for someone else.

Continue

Once you have chosen this option please click on **Continue**

You will then need to search for the relevant person in your team you wish to book on this training course by their given name – you will only be able to view your team and yourself.

If you use **one word** in your search we will search the **person's surname, employee number and company name.**

If you use **two words** we will search the person's **forename** with the first word and their **surname** with the second word.  
For example **jo sm** will find Joe Smith.

You can either select a **person** from your search results below, or you can create a new **person** by clicking on **Add**.

Include employees that have **left the company**

Search Text

You have chosen to make a **provisional** booking.

Search

	Name	Company
<span style="background-color: #0056b3; color: white; padding: 2px 5px;">Add to order</span>	Mr Josh	Cornerstones Group
<span style="background-color: #0056b3; color: white; padding: 2px 5px;">Add to order</span>	Miss Lisa	Cornerstones Group

Once you have found the relevant person, click [Add to order](#)

To add more courses for this person or add other bookings for different people to the same order click on the white "Add Item" button

Description	Qty	Amount	Total
27th February 2018, Face to Face - Patient Handling for Lisa at Moorgreen Hospital Provisional	1.00	£	£ <span style="color: red;">✕</span>
		Order Total	£
		VAT	£0.00
		Total	£

**Additional Notes**

[Recalculate](#)

↓

[Discard](#) [Save](#) [Add item](#) [Continue](#)

You will follow the same steps to book this person on to a different course or book another team member on to a course.

Once you have booked this person on another course or created a booking for another team member, you will then be presented with the view your order screen again. You will notice that there is an extra person or course for the original person booked on.

You can add as many people as you want by following this process. Also, you can remove an item if you no longer wish to go ahead with this booking by clicking the red X icon to the right of the booking.

Once you have finished with the order, click continue and review/authorise the line manger section ensuring there is a line manager as this will need to be inputted and correct. Then review/accept the terms and conditions.

Your staff will then be booked on to the chosen events.

## Is this booking a non-statutory & mandatory training course?

### The system checks compliance First!

If a team member is not in date for all statutory & mandatory training, a warning message will appear when trying to approve this booking, plus a link to view the list of out of date topics / compliance.

Click **'Discard'** and make sure to book them onto the relevant statutory & mandatory training course.

Please note that below delegate(s) are out of compliance for one or more skills.

Lisa - Please [click here](#) to see their compliance status

Or if, without this non-statutory & mandatory training booking there is a risk to service users/patients, myself or staff: Then the manager must risk assess this need. If agreed, the staff member may be able to continue with their booking and the manager will be warned that the staff member is non-compliant before they approve your booking

## Approving the booking

To approve the booking you have just made for this person or for staff members that have booked onto a course you will need to be on the "Home" screen and you will see the "My Task List" section

My Task List	
Task	<a href="#">There is a training request for Lisa</a> waiting for you to process

Click on the task labelled as "Task There is a training request for *Staff members name* waiting for you to process"

You will need to select if you are the correct manager for this member of staff, then either accept or reject the booking. If you are not the correct line manager, you will need to click the 'Not Me' button. This will return the booking to the staff member to choose the correct person.

**Your authorisation is required**

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**Line Manager**  
Please accept or reject this order

**Is this correct?**  
Please check and correct the following information so that we can route your request to the correct people. If you are happy with the information please tick the box before processing this request.

**Line Manager**     **Joshua**     [Not specified]     joshua     @southernhealth.nhs.uk    

**This information is correct**

Once you have ticked the 'This information is correct' tick box you will then need to scroll down the page and click either the accept button or decline button and enter your name to authorise the booking.

Description	Qty	Amount	Total	Accept/Reject all
27th February 2018, Face to Face - Patient Handling for Lisa at Moorgreen Hospital <b>Provisional</b> 13:00 - 16:30	1.00	£	£	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>

**Please Note:** if you decline the training you will need to enter a reason as to why this has been declined.

**Accept/Reject all**

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Reason for rejection

## How to cancel one of your team members training

As a manager on MLE you have the ability to cancel a team members training.

From the Home page you will need to go to the 'My Team' section and click 'View Details' next to the staff member you wish to see.

Once you are on the user's training record, select the 'Training Record' tab

On the Training Record tab, you can see all the user's training past and future.

**Miss Lisa** Cornerstones Group

Email: lisa. @southernhealth.nhs.uk

Phone: [Redacted]

Show details

Training Record | Booking History | Contact History | User Documents

Training record for Lisa

Item	Start	Completed	Code	Title	Booking Agent	Booked	Status	Attendance	Supplier	Expires	Invoice Number	Hours
5221210	27 Feb 2018	27 Feb 2018	SH-ET1219	Face to Face - Patient Handling	Moorgreen Hospital	Miss Lisa	21 Feb 2018	Confirmed	Booked	Southern Health NHS Foundation Trust (TAS)	1100	3.5

To cancel one of the training sessions that have been booked you will need to click the Booking number on the left hand side.

This will take you to the booking details for this team member; from here you can cancel this booking. To do this you will need to click the white "Cancel Booking" button.

**Administer this booking**

The charge to **cancel** this booking at this point in time would be **£0.00**

Cancel booking

Once you have clicked the 'Cancel Booking' button it will take you to the Booking Details page where you can cancel the booking.

Give a reason for the cancellation in the text box – this will be what is shown for the booking.

**Cancel booking**

**Cancellation Reason**  
Please give a reason for this cancellation

After putting the cancellation reason, click on the 'Cancel' button or click 'Back' if you do not want to cancel this booking.

**Cancellation charge**

If you choose to **Cancel** this booking the charge will be:

Nett	Gross
No Charge	No Charge

The course has now been cancelled and clicking the 'Done' button will take you back to the booking page where you'll see the booking as being cancelled.

**Cancellation charge**

If you choose to **Cancel** this booking the charge will be:

Nett	Gross
No Charge	No Charge

Booking cancelled.