

Company Booker Guide

How to manage your organisation's training, stay on top of compliance and keep your team's certifications current — all from one place.

THIS GUIDE IS FOR

HR managers · Training coordinators · Compliance managers · Procurement teams

What the Organisation Hub Does for You

The Organisation Hub gives you a single place to manage everything related to your organisation's occupational health training. Rather than chasing emails, maintaining spreadsheets or calling GTS MedOH to ask for updates — you can see everything yourself, whenever you need it.

There are four things the hub helps you stay on top of:

PROBLEM	HOW THE HUB SOLVES IT
You don't know who is trained and who isn't	The Compliance tab shows every employee's status — current, expiring or lapsed — across all compliance types
Certificates expire without warning	Automatic alerts are sent at 180, 90, 30 and 7 days before expiry — so you always have time to act
You can't see where the gaps are	The compliance heatmap shows exactly which departments and job roles are falling behind
Booking for multiple delegates is time-consuming	You can book multiple delegates at once, manage purchase orders and track all bookings in one view

Signing In

You will receive an invitation email from GTS MedOH containing a sign-in link. Click the link, set your password, and you will land directly in your Organisation Hub. Everything you see is scoped to your organisation only.

 Bookmark the hub once you've signed in — you'll be using it regularly. If you forget your password, use the **Forgot password** link on the sign-in screen.

Booking Training

SCENARIO

Your OH nurse, Jane, needs to attend the Audiometry training course next month. You need to book her a place, pay by purchase order, and make sure a certificate is issued when she completes it.

1 Click Book Training

From the hub dashboard, click **Book Training**. You are taken to the GTS MedOH course listing, where you can browse available courses and upcoming session dates.

2 Select the course and date

Choose the course Jane needs, then select an available date. Green dates have places; amber dates are nearly full; greyed-out dates are full.

3 Enter Jane's details

Enter her first name, last name, email address and job title. Use her work email — this is how her certificate is emailed and how her compliance record is matched to her employee profile.

4 Pay by card or purchase order

Select **Purchase Order** if your organisation pays by invoice. Enter your PO number or leave it blank to add it later. The booking is confirmed immediately.

5 Jane attends and gets her certificate

After the session, Jane receives a feedback email. Once she submits feedback, her certificate is issued automatically. Her compliance record updates immediately — no action needed from you.



Booking multiple delegates? You can add multiple people to a single booking. Each delegate receives their own joining instructions and certificate.

Managing Purchase Orders

SCENARIO

Your finance department requires a purchase order number before authorising any training spend. You want to book now and add the PO reference once it has been approved.

The Purchase Orders section in your hub shows all bookings that are pending a PO reference, along with those already processed. Here is how it works:

1. Book the training — the booking is confirmed immediately even without a PO number
2. Go to **Purchase Orders → Action Required**
3. Find the booking and enter your PO reference number, or upload your purchase order document
4. GTS MedOH confirms the PO and raises an invoice
5. Once the invoice is raised, the invoice reference appears in your hub

i Delegates receive their joining instructions as soon as the booking is made — you don't need to wait for the PO to be processed for them to attend.

Staying on Top of Compliance

SCENARIO

Your health and safety audit is in three months. You need to show that all relevant staff hold current certifications in audiometry, spirometry and HAVS surveillance.

Go to **Compliance** in your hub. You will see an overview showing your organisation's compliance score and any immediate actions required.

Understanding the compliance score

Your compliance score is the percentage of tracked certifications that are current or due for renewal soon. A score of 100% means every required certificate is valid. A lower score means some certificates have expired or are missing.

CURRENT



Certificate is valid and not approaching expiry

EXPIRING SOON



Certificate valid but renewal recommended

LAPSED



Certificate expired — action required

The compliance heatmap

The heatmap shows compliance by department and certification type. Each cell is colour-coded:

- **Green** — 80% or more of staff in this department hold this certification
- **Amber** — 60–79% compliance — some renewals needed
- **Red** — below 60% — significant gaps requiring action

EXAMPLE

The heatmap shows your Engineering department is red for HAVS Surveillance. You click the cell to see exactly which engineers are missing or have lapsed certifications. You then book renewal sessions for those individuals directly from the compliance view.

Certificate Expiry Alerts

You don't need to manually check expiry dates. The system sends automatic alerts before any certificate expires:

WHEN	WHAT IT MEANS	ACTION RECOMMENDED
180 days before	Early notice — plenty of time to plan	Review upcoming renewals and schedule training
90 days before	Renewal recommended	Book the renewal course
30 days before	Urgent — certificate nearing expiry	Book immediately or confirm renewal is in place
7 days before	Final reminder	Confirm the delegate's renewal is booked

Your Delegate Records

The Delegates section shows everyone who has been booked onto GTS MedOH training under your organisation. For each person you can see:

- All their bookings and attendance history
- All their certificates, with expiry dates and download links
- Their upcoming sessions

SCENARIO

A new manager asks you to prove that Paul from the maintenance team holds a valid HAVS Surveillance certificate. You search for Paul in Delegates, find his certificate and share the verification link directly with the manager — taking under 30 seconds.

Exporting Records

Every section of the hub has an export button. Use this to produce CSV files for:

- Regulatory inspections and audits
- Internal compliance reporting
- Sharing with your health and safety manager

i The certificate export includes organisation, employee name, compliance type, certificate number, issue date, expiry date and provider. This format is suitable for most regulatory submissions.

Using the AI Assistant

The AI tab in your hub lets you ask plain-English questions about your organisation's compliance status. You don't need to know which report to run — just ask.

Examples of questions you can ask:

- *"Which certificates are expiring in the next 90 days?"*
- *"Which employees are missing mandatory training?"*
- *"What is our overall compliance score?"*
- *"Which departments have the biggest compliance gaps?"*

⚠ The AI provides advisory guidance only. All recommendations should be verified with your occupational health professional before taking regulatory action.

Cancelling a Booking

If a delegate can no longer attend their session, you can cancel directly from the hub. Find the booking in the Bookings section, and click Cancel. The session place is freed immediately and the delegate is notified. Cancellation policies set by GTS MedOH apply.

Frequently Asked Questions

A delegate completed training but their certificate isn't showing in the hub.

The certificate is issued after the delegate submits their course feedback. Ask the delegate to check their email for a feedback request, or to log into their own delegate portal and submit it from there.

I need to add an employee to the system who completed training with a different provider.

Contact the GTS MedOH team. External certificates can be manually added to your organisation's compliance record, so all certifications appear in one place regardless of provider.

Our organisation name has changed. What do I need to do?

Contact the GTS MedOH team. The organisation name must be updated consistently across all bookings to ensure records remain linked correctly.

Someone has left the company. What happens to their records?

Contact the GTS MedOH team to update the employee's status. Their historical training records are retained for audit purposes, but they are removed from active compliance tracking.