

Certificates Operations Guide

How certificates are issued, what triggers them, and how to handle exceptions including voids and reissues.

FOR

Operations staff · Platform administrators

How Certificates Are Issued

Certificates are issued automatically — no manual action is required in a normal session workflow. The trigger is the delegate submitting their course feedback after attending a session.

The full sequence:

- 1 Session marked complete**
Attendance is recorded for each delegate.
- 2 Review emails sent**
Each attended delegate receives a feedback request email automatically.
- 3 Delegate submits feedback**
The delegate completes the short feedback form via the emailed link or their delegate portal.
- 4 Certificate issued**
The certificate is generated, emailed to the delegate and becomes available in their portal and the organisation hub.
- 5 Compliance record updated**
If the course has a compliance type set, a compliance record is created or updated automatically for the delegate.

i Why feedback is required before the certificate: This ensures the certificate is only issued to delegates who completed the full course experience, including providing feedback used for course quality improvement.

When a Delegate Hasn't Received Their Certificate

The most common reason is that the delegate has not yet submitted their feedback. Before investigating further, always check whether feedback has been submitted.

SITUATION	ACTION
Delegate hasn't submitted feedback	Ask them to check their email for the feedback request, or to use the Submit Feedback button in their delegate portal
Feedback submitted but no certificate received	Check the delegate's email address on the booking — the certificate is emailed there. Ask them to check spam.
Delegate signed up with a different email	The certificate is still available in their portal — they need to sign in with the email used on the booking
Session was never marked complete	Mark the session complete and send the review email

Voiding a Certificate

When to void: a certificate was issued to the wrong person, issued for a session the delegate did not actually attend, or contains an error that cannot be corrected.

Voiding a certificate marks it as invalid and removes the download link. It remains in the system for audit trail purposes. The delegate is notified.

 Always document the reason for voiding clearly — the reason is stored permanently in the audit log and may be reviewed in a regulatory context.

After voiding — reissuing

Once a certificate is voided, you can issue a replacement using the Reissue function. The reissued certificate carries a new certificate number and is linked to the original in the audit trail. Enter a reason for the reissue — this is also permanently logged.

Certificate Expiry and Validity

Each certificate's expiry date is calculated from the issue date plus the validity months set on the compliance type. For example, an Audiometry certificate issued on 1 March 2025 with a 12-month validity expires on 1 March 2026.

Expiry reminders fire automatically at the intervals configured on the compliance type (typically 180, 90, 30 and 7 days before expiry). These go to the delegate and, where compliance tracking is active, to the organisation hub.

Permanent certificates

Some compliance types have no validity period — the certificate is permanent. These are configured with no validity months on the compliance type. They do not generate expiry reminders.

Certificate Verification

Every GTS MedOH certificate has a unique verification link that employers, regulators or third parties can use to confirm the certificate is genuine. The verification page is publicly accessible — no login required. It shows the full certificate details and confirms its validity status.



Encourage delegates to share the verification link rather than the PDF when providing evidence to employers. It cannot be forged and is always up to date.
