

Courses Operations Guide

How courses work, what to check, and how decisions about courses affect bookings, compliance and revenue.

FOR

Operations staff · Platform administrators

Why Courses Matter Beyond the Booking

A course in GTS MedOH is not just a product on a booking form. It is the anchor for compliance records, renewal forecasting and revenue reporting. Every decision you make about a course — its price, its compliance type, whether it is published — affects downstream data across the whole platform.

The course → compliance link is everything

When a course is linked to a compliance type, completing it automatically creates or updates a compliance record for the delegate. Without this link, the training is booked and delivered, but the compliance record is never created. This is the single most important configuration step for any course.

 **Before marking any session complete:** confirm the course has a compliance type set. If it doesn't, no compliance record will be created for any delegate who attends — and you will not be able to add it retroactively without manual work.

Course Status — What It Means

STATUS	WHAT IT MEANS	WHAT TO DO
Published	Course is live on the public course listing and available in the booking form	Normal state for active courses
Unpublished	Course exists in the system but is not visible to delegates or bookers	Use for courses in preparation or temporarily suspended

When to unpublish a course

Unpublish a course when it is being updated, is seasonally unavailable or has been discontinued. Do not delete courses with historical bookings — the booking history and compliance records would be affected. Unpublishing is always the safer choice.

Course Pricing — How It Flows

The price on a course record is used in three places beyond the booking form:

- **Invoice calculations** — used as the basis for raising invoices

- **Renewal revenue forecasting** — the renewal pipeline uses course price to estimate future revenue from expiring compliance records
- **Management Intelligence** — revenue metrics depend on booking values, which reflect course pricing

i Keep prices up to date. An out-of-date course price will cause renewal forecasts to understate or overstate revenue, which affects management decisions.

Course Resources

Resources uploaded to a course appear in the trainer portal for trainers qualified to deliver it. They do not appear for delegates. Use course resources for:

- Pre-reading materials and reference documents
- Trainer delivery notes
- Assessment criteria and marking guides
- Updated regulatory references

Keep resources current — trainers use them for every session they deliver.

What to Check When Adding a New Course

-  **Compliance type is set**
Without this, the course does not create compliance records.
-  **Price is accurate**
Used in forecasting and invoicing.
-  **Validity months are set on the compliance type**
This determines when delegate certificates expire and when renewal alerts fire.
-  **Trainer qualifications are updated**
Trainers can only see resources and be assigned to sessions for courses in their qualifications list.
-  **Course is published**
Only published courses appear in the booking form.

