AdviceUK Training and Event FAQs

Introduction

How can we help? Find answers to commonly asked questions about AdviceUK training courses. Just click on the questions below to find your answers. There's also some content relating to how to use the AdviceUK Portal when it comes to booking onto courses and accessing invoices.

If you require this document in an alternative format, then get in touch with us (select "Training and Qualifications" as your area of interest) or email us directly if you already have our email.

Important: The information in this document is up to date and correct to the best of our ability. AdviceUK disclaim any liability in connection with the use of this document and related information.

Contents

Booking onto courses

How to book on to a course or event

You can book onto courses -whether they're online or face-to-face - by using the AdviceUK Portal. Just select the programme or individual course/event that you're interested in, and scroll to the bottom of the page. Select the ticket that applies to your organisation type and register to book. You'll need a login for the AdviceUK Portal to book. Follow the on-screen instructions to either log in or register for a Portal account.
To confirm your place, we will then email you the calendar invite(s) within 5 working days. Save/accept the invite(s) and check your junk email if you haven't received them. Zoom details are different for each session, even if it's the same course, so it's important that you have the relevant details available.

Course costs

The cost of our courses or course bundles varies depending on the course, trainer and if it's online or face-to-face. Our tickets have 3 different price bands:

1. AdviceUK member – the discounted ticket for organisations who are AdviceUK members.
2. Voluntary Sector Organisation - For Voluntary Sector Organisations (charities) who aren't AdviceUK Members, including Student Unions.
3. Other Organisations – e.g., Non-member Local Authorities, Universities.

Make sure you're logged in to the Portal to see the AdviceUK member tickets. Examples how the tickets appear can be found further down in this document.
If you can't see them and think there's a mistake or problem, get in touch with us – the Membership or Training teams are best placed to help - we can check your membership on our system.

Booking confirmation

The invoice acts as confirmation, which you can view on the Portal when you've finished the booking, or via the automated email containing a hyperlink to the invoice. There's more information about accessing and paying invoices within this document.
The attendee(s) will receive the calendar invite(s) via email within 5 working days. They'll need to save/accept the invite(s) depending on their email server and check their junk mail folder if they haven't received them.

Can you reserve a place for me?

No, unfortunately we don't have the capacity to do this.
If you want a place reserved because the attendee details aren't yet confirmed (e.g., You're recruiting for a new position), then we recommend you book the place in your name and update the attendee details as soon as you have them. This can be done using the "Manage Registration" feature on the Portal, detailed further down in this document. Please be aware that this would then mean you – the placeholder – are also manually removed from any calendar invites you've been sent, to make sure the records across our systems are accurate.

What if course dates or timings aren't suitable for me?

Hopefully we can welcome you on a future date. We share course dates via our portal, rightsnet and via AdviceUK email updates (newsletters), so we recommend signing up or checking regularly, as applicable.
We can't get in touch on an individual basis when the next date is confirmed. We can add you to a waiting list and include you in a group email when the next dates of a course are available. Being on a waiting list does not mean a place is reserved for you; places are still on first-come, first-serve basis.

If there's someone else who could take your place, follow the instructions for transferring registration here, then get in touch with us.

Do not book onto a course or bundle if you/the attendee cannot commit to all of the dates, as this creates extra work for us.

Don't forget, we can also run courses as in-house training, online or face-to-face, for your organisation.

What can I do if a course is sold out?

If a course is sold out, we can add you to a waiting list and include you in a group email if a space becomes available. Being on a waiting list does not mean a place is reserved for you; places are still on first-come, first-serve basis

It's worth being aware that ticket numbers are managed manually. As some courses are available in multiple bundles, this may mean we "sell out" but are able to change ticket allocation. If a course/bundle is sold out, or you want to book more people on than there are spaces available, get in touch with us and we'll see if we can help, depending on overall booking levels.

I can't find a particular course, is it still running?

We run a variety of courses. Our most popular ones are part of our LTA (Learning To Advise) Programme; the 10 courses that are part of LTA run 3 times a year:

1. Advice Skills Plus - The Background and The Process
2. Advice Skills Plus - Handling Difficult Client Situations
3. Effective Case Recording
4. Telephone Skills for the Advice Sector
5. Advice Skills Plus - Student Advice: An Overview
6. Introduction to Welfare Benefits
7. Introduction to Universal Credit
8. Introduction to Money and Debt Advice
9. Introduction to Housing and Homelessness
10. Advice Skills Plus - Reflective Practice: Building Resilience in Advice Work

Other courses are only run when there's enough demand. It may also be that we just haven't listed a confirmed upcoming course yet on the Portal and are in the process of doing so.

Do I have to be an AdviceUK member to attend a course?

No, you do not. You can be a paid employee or a volunteer from any sort of organisation. We have people who are interested in a career within the advice sector.
You just need to create a Portal account to book onto the course and make sure you select the correct ticket type. Creating a Portal account does not mean you're an AdviceUK member, it's just what we use for booking onto courses and events.
If you're unsure or have questions, just get in touch with us.

Accessibility

I have accessibility requirements – will these be accommodated?

When booking onto a course, you can let us know about any requirements when adding attendee details. E.g., You can let us know that you will be working with Sign Language interpreters or require 18pt font in all shared materials.

Face-to-face, open training: We try to book the majority of training in the same room of the same venue, as we know there is ramp access to the building and lift access to that specific room.

Course materials: We strive to create courses and materials that everyone can access. Please note: Unless requested, we do not share materials with attendees before training. e.g., The PowerPoint slides. If receiving materials beforehand is a part of your access requirements, just let us know when booking.

Your access requirements will be shared with the trainer and co-host (if applicable) for online training. If the training is face-to-face, it is shared with the trainer and possibly the venue.

Please inform us of any access requirements at least 2 weeks in advance of the course, if possible.

If we require any further information, we'll be in touch. Equally, use our online form to get in touch with us (select "Training and Qualifications" as your area of interest) or email us directly if you already have our email.

Will you book an Interpreter or other support on my behalf?

Unfortunately, we do not have the resources to provide or arrange for Interpreters or other Access Workers (e.g., Note taker or Captioner), so please make arrangements for yourself as needed.

We're very happy to work with Interpreters and other Access Workers that you've booked e.g., Sending them materials beforehand to make sure they can familiarise themselves with the content and any technical vocabulary.

You or they will need to get in touch with us to provide their contact details,

including their name and email address, so that we can make the necessary arrangements.
We can also ensure features such as “Multi pin” and assigning Captioners are used during Zoom sessions, if required.

Face-to-face training

Is face-to-face training available?

Yes, we run some courses face-to-face throughout the year. This depends on a number of factors, such as demand and trainer availability.
Demand for training to be delivered online is still high, so we continue to run all Learning To Advise and most other courses online. If there's demand for a specific course to be face-to-face, we can of course consider if it's viable.
For in-house training (just for your organisation or a select group), it may be possible to deliver face-to-face if this is what you require; again, it varies according to the trainer.

Can I attend face-to-face training via Zoom?

No, unfortunately we can't accommodate this either in advance or on the day.

Where's the open, face-to-face training held?

We can only confirm this to booked attendees. We try to consistently use a small selection of venues.
When confirmed, venue details will be in the "Location" field of the calendar invite, with further venue details typically attached in a word document.

Online training

Do I need to download Zoom software ahead of an online course?

If possible, yes, as it means you can more easily participate in the training. However, Google Chrome is best if you are only able to join via a browser. You don't need a Zoom account if you're joining as an attendee. The following page from the Zoom website may answer some questions: Zoom - Frequently Asked Questions.

Why haven't I received a calendar invite for training yet?

We send calendar invites for both face-to-face and online courses. Please wait up to 5 working days to receive them. It's also worth checking your junk mail folder, and adding the email domain "adviceuk.org.uk" to your safe senders list. If you've not received anything after 5 working days, get in touch with us.
If you've made the booking, you could follow these instructions to check it's gone through

How to join a training session online

Assuming you've been booked a place, you'll have been emailed a calendar invite, where the Zoom details are. You may need to scroll to the bottom of the invite to get the Zoom link. **You cannot access training via the Portal** (this is a feature only used for Member Events, which are separate to Training).
Every online session uses a different Zoom link for security purposes, so make sure you're using the correct link for the correct day when training online.

Most people should be able to join by clicking the link in the calendar invite, however, this can depend on your organisational or device security settings. Because of this, we also provide other ways of joining, e.g., Providing the Zoom meeting ID and password, so you can go to the Zoom website and join that way.

Where's the Zoom link?

The Zoom link for each session is in the calendar invite, located towards the bottom.
Our trainers are freelance and use their own Zoom accounts, however, due to data protection, AdviceUK create the actual calendar invites and emails them to attendees. Therefore, invites may not be updated with the link until shortly before the session. Do not worry, you just need to save or accept the updated invite – it's quick and easy to join the online session.
Wherever possible, we aim to update invites with the Zoom link in plenty of time before the training.

Zoom help

If you're having problems, here are some useful links from the Zoom website that may help:

- If you can't hear anyone or be heard, go to Troubleshooting audio issues
- Troubleshooting Video Issues
- For basic "how to" information such as joining meetings and using chat, go to Getting Started with Zoom Meetings

Some attendees find leaving and re-joining a meeting can be helpful with a variety of issues. Also make sure you're logged out of other programmes that may be using your mic or camera. E.g. Microsoft Teams.
For some attendees having persistent audio issues, they may want to consider staying on the session with their device for the video and joining via the phone for the audio (dial-in details are towards the bottom of the calendar invite).

For general Zoom help, go to their Zoom Support homepage.
There are also some useful Getting started articles on their website.

Do you only use Zoom for online training?

Yes. We've found this the most widely-used platform by many organisations. It's also something our trainers are familiar with. You don't need to be a technical genius to use it and our trainers are happy to explain any functions you may need to use or help you find other ways of engaging during the session. Our aim is to make training engaging but not overly complicated.

Do I have to have my camera on during an online course?

No, you don't have to. We encourage people to have them on, but it's not mandatory. The only courses we need them on for, due to safety reasons, are our Mental Health Awareness, Mental Health First Aid or Suicide First Aid courses. You/whoever fills out the booking form can put it as an accessibility requirement, as then it'll be passed on to the relevant trainer. At the start of courses, trainers do remind people to put on their camera if they can, but those who aren't able to/don't feel comfortable doing so will not need to re-explain themselves if they've already let us know.

Course content and structure

Materials used during the Zoom sessions

For all courses from our LTA (Learning To Advise) programme and most other non-LTA courses, you will at least be sent a pdf of the PowerPoint slides **after** the course. Please note, we do not send them beforehand as standard, unless this is for access requirements. A lot of our courses also have a handbook to complement what you have learned, as well as covering further topics.

Give feedback on a course

The surveys we ask you to complete after each course give you the opportunity to feedback what you liked, didn't like or thought could be improved. This could be for any part of the course – the format, the timings, the content, the trainer. The link to a survey is either shared in the Zoom chat at the end of a session or it's shared via email afterwards; sometimes both.

Are training sessions recorded?

No, they're not. This is for various reasons including:

- Confidentiality for attendees and trainers
- The fact that information changes. Referring to a year-old recording could mean you do not have up to date information
- Call quality. If a trainer or co-host needs to record, this affects the bandwidth, which in turn affects the quality of the Zoom call. This can be disruptive for trainers and attendees
- People tend not to be as engaged if they know a session is being recorded, and are prone to doing other tasks instead or just not focusing

Self-guided work (homework)

Most of our online training has self-guided work. Our face-to-face tends not to. Generally, for online training, we'll email out any self-guided work around 1 week before the applicable Zoom session.
There may also be work in-between Zoom sessions. Our trainers have worked hard to make sure it's relevant, clear and useful, so it's important to complete it. We never shame anyone for not doing it, but it may mean that the trainer has to cover content already included in the homework again, during the live Zoom session. As timings are tight, we'd prefer to not have to do this.

You don't need to email us your completed work, but it may be that you're required to have it ready to refer to during Zoom sessions.
On a related note, this type of work may also be referred to as "self-guided learning" or "pre-work". As always, just ask if you're unsure.

Course length

This varies according to the subject and how the trainer has broken up the training. Our trainers are all freelance, with different training styles and content to cover. We've tried to make timings consistent where possible.
Some courses may also finish early depending on if the trainer has been able to cover all of the content in good time. It also depends on attendee participation.

Breaks during the course

Breaks vary depending on the course, but trainers will always include at least one break per session. If you need to know specific break times, just ask the trainer at the start of the session.
If you need to take a break or step away from your screen, let the trainer or a colleague on the course know, depending on what's convenient and applicable; then we know you're OK.

Some courses use Thinkific but others don’t. Why?

Again, this is down to which tools trainers feel comfortable using, as they know their content better than anyone else.
We’re currently reviewing our training processes and tools used, so it may be that we are able to offer something more consistent in the future.

What’s the difference between “programme”, “course”, “session” & “part”?

We try and keep language consistent across our courses. However, all our fabulous trainers are freelance and we don’t expect them to be robots.

When we say “programme”, we are referring to the whole Learning to Advise programme – which is made up of various “courses”, e.g., “Introduction to Student Advice” or “Introduction to Universal Credit”.

A “session” could refer to a Zoom or face-to-face session with the trainer and other learners.

Finally, “part” just refers to a part of the course. e.g., A Zoom session is a part, as is pre-session or in-between session learning, which could be something such as reading, reflection exercises or part of a workbook.

If you’re ever in doubt, just ask! It’s hard to get everyone speaking the same language at all times, but we are always happy to clarify.

Attendance and cancellations

Do I have to attend both/all sessions of a course?

Yes. This is very important. For online training, a lot of it's been split across Zoom sessions on different dates, but both/all dates must be attended.
e.g., You can't only attend the first date but not attend the second; we won't be able to record the session and will still charge you for the full course. The same applies for a face-to-face course.
Refer to the cancellation policy on our online booking form or get in touch with us.

Can I attend a face-to-face course online?

Unfortunately we cannot offer the option to join a face-to-face course, online.

Course booking deadlines

For face-to-face courses, at least 2 weeks before is best so that we can be sure the course is viable.
For online courses, we recommend at least 1 week before, if possible. Many online courses have self-guided work to complete before the first session, it gives you enough time. Don't worry, it's generally nothing strenuous, but having enough time to prepare is important, as self-guided learning is designed to "warm you up" for the course and may be referred to during sessions.

What time should I arrive for training?

Online: In the invites, we remind you to join 5-10 minutes before the start time on the calendar invite.

You'll be put in an online waiting room before the session starts. This also helps with security, so we can check your off of our attendees list.

If your Zoom screen name doesn't clearly indicate who you are, you may be asked verbally or messaged. We're happy to rename you in the session if you're unsure how to do this.

Face-to-face: If possible, try to be no more than 15 minutes early, as our trainers may still be setting up for the course and want to make sure this is done properly. E.g., If a course starts at 10am, you can arrive from 9.45am.

If you're running late

It's inevitable that sometimes things pop up, life happens! But we ask that you make every effort to be on time for your training. If the invite states it starts at 10am, then that is when we want to start the session.

Online: You'll notice that we recommend you join the meeting 5- 10 minutes before the start time, as this can be a good buffer in case there are problems. Try and let us know if you're running late. You can email us or, if a colleague is in the Zoom session, perhaps let them know and they can pass on the message.

Face-to-face: AdviceUK staff work remotely the majority of the time, so are contactable primarily via email. However, where applicable, a mobile number will be shared with attendees to call if running late.

If you can't attend a course you're booked onto

Our usual 14-day cancellation policy still applies. This is because if someone cancels at the last minute, someone else may miss out on being able to take your place.
If someone else from your organisation can take your place, please try to email us 7 days before, as there may information or self-guided work we need to send to them. If you're booked onto a bundle or one of our Learning To Advise Programmes, you can't swap with anyone or defer your attendance.

We can't defer places on courses or individual sessions. e.g., If you have attended Session 1 but can't attend Session 2 of a course, or vice versa, we can't defer your place to the next time the course runs. You'd need to book the course again at full price.
If you're cancelling with 14 days or more notice, then you can book onto the next convenient date.

I'm on the full LTA programme but can't attend a course, what can I do?

We understand that priorities and timetables can change and that it sometimes happens with little warning; this is the advice sector after all! However, the generous discount applied when one of our LTA programmes is booked is partly due to the reduced levels of admin involved from having the same person attend all of the courses. This means that you can't swap with someone or defer your place. Please get in touch with us so we can let the trainer know.

Certificates of attendance

Only those that complete our Learning to Advise Programmes will get a certificate of attendance.
We're not able to provide certificates for individual open courses.
Exceptions are the Mental Health Awareness, Mental Health First Aid and Suicide First Aid courses – this is because they're provided by the relevant external party who created/run the course.
We're happy to provide a word document to attendees, which they can fill in themselves and keep as a record of learning; this could then be used as evidence for individual Continuing Professional Development (CPD) files. Email us after the course if you'd like this.

If you have booked in-house training with us, the booker needs to request certificates of attendance when making the booking.

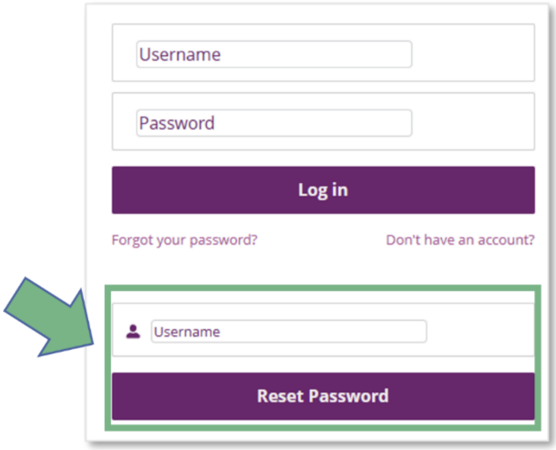
Using the AdviceUK Portal

Register for a Portal account

You can click here to register for an account. Registering for a Portal account doesn't mean that you are applying for or renewing AdviceUK membership.
If you work/volunteer for an organisation, use the email address you've been given by your organisation if possible. This means that our system can link you to your organisation and, if your organisation is a member, you can access the discounted member's price tickets immediately.
We recommend people create and use their own Portal account. Then, if we have any questions about a booking or need to get in touch, we can get in contact with the correct person, quicker.

Password reset

A quick way to do this is to go to the login page and type the email address you used when making your account in the bar above the purple "Reset Password" button. Then, click on the "Reset Password" button.

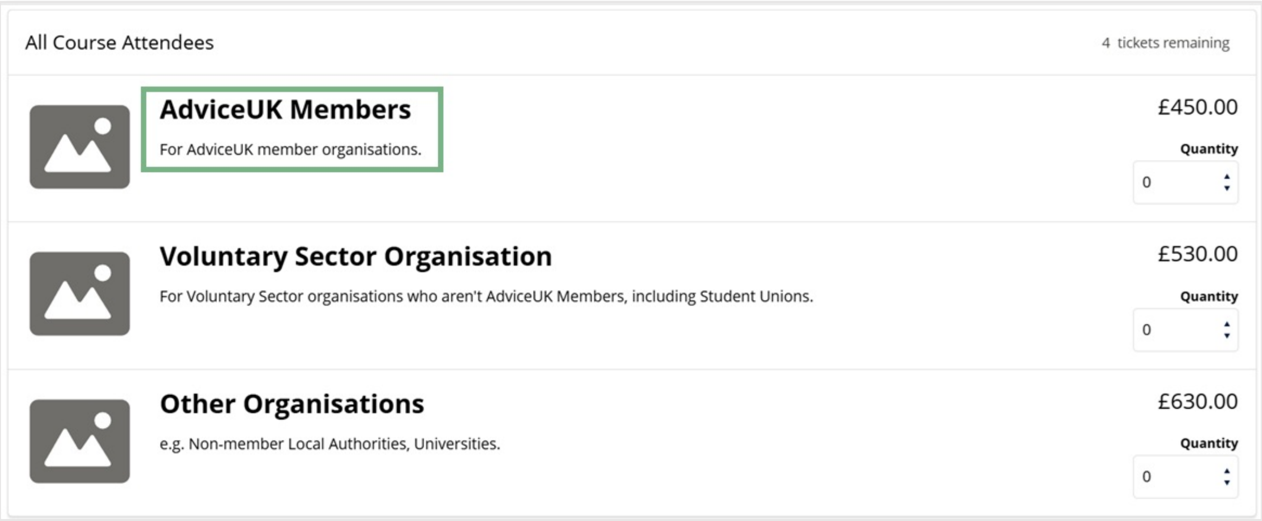


An email will be sent with further instructions on how to reset your password. The link in the email will only be active for 24 hours.

Where are the AdviceUK Member’s tickets?

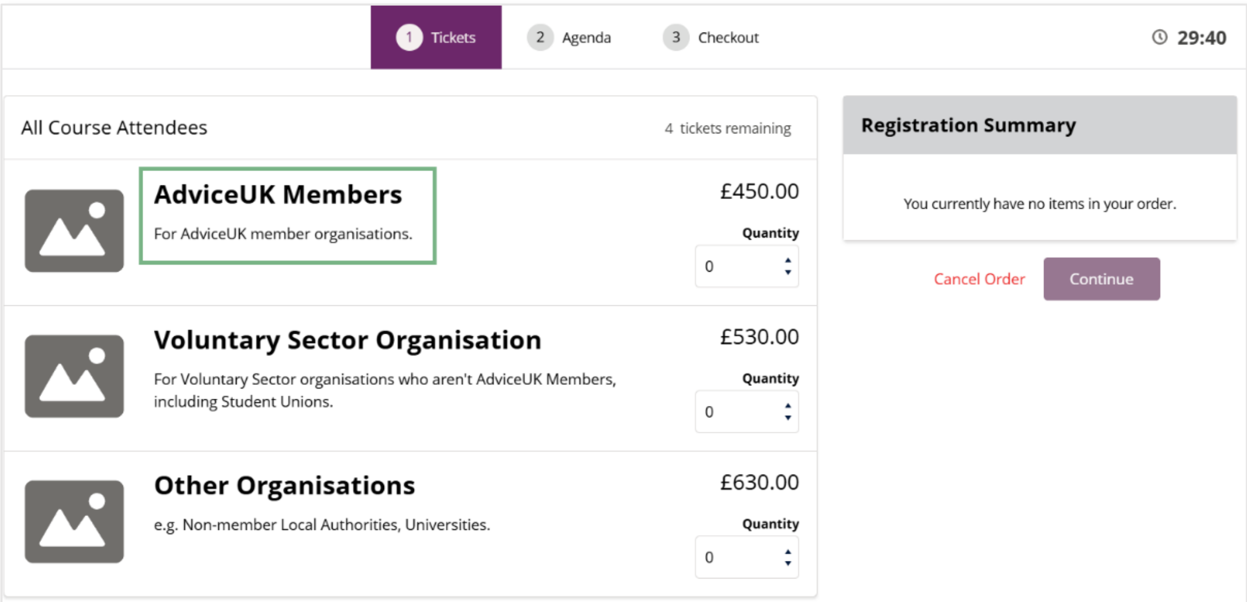
Depending on what page you’re on, you can find them either:

1. At the bottom of the Course Overview page:



Or

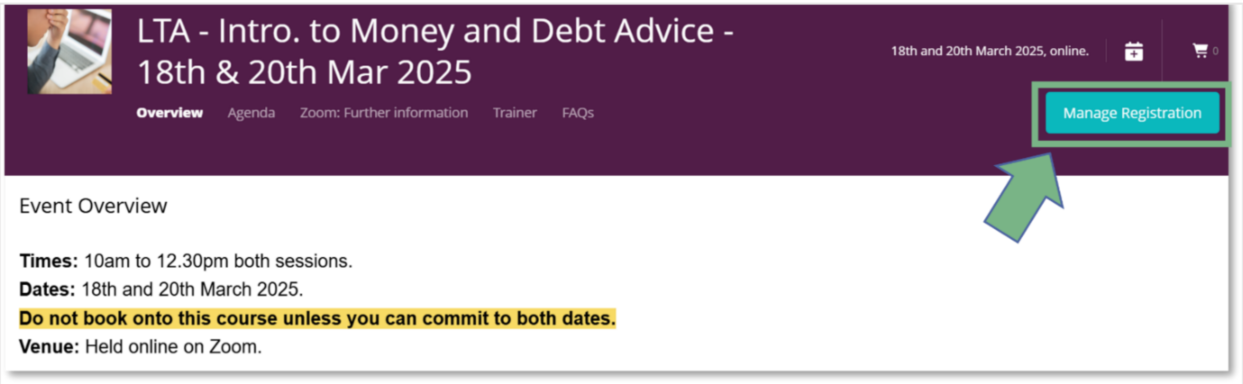
2. After clicking the green “Register” button on the top right of a course page:



Check who is registered onto a course

At the moment, the best way to do this is:

1. Log in using the same account you used to book
2. Go to the course/event
3. Click on the green "Manage Registration" button, towards the top right of your screen



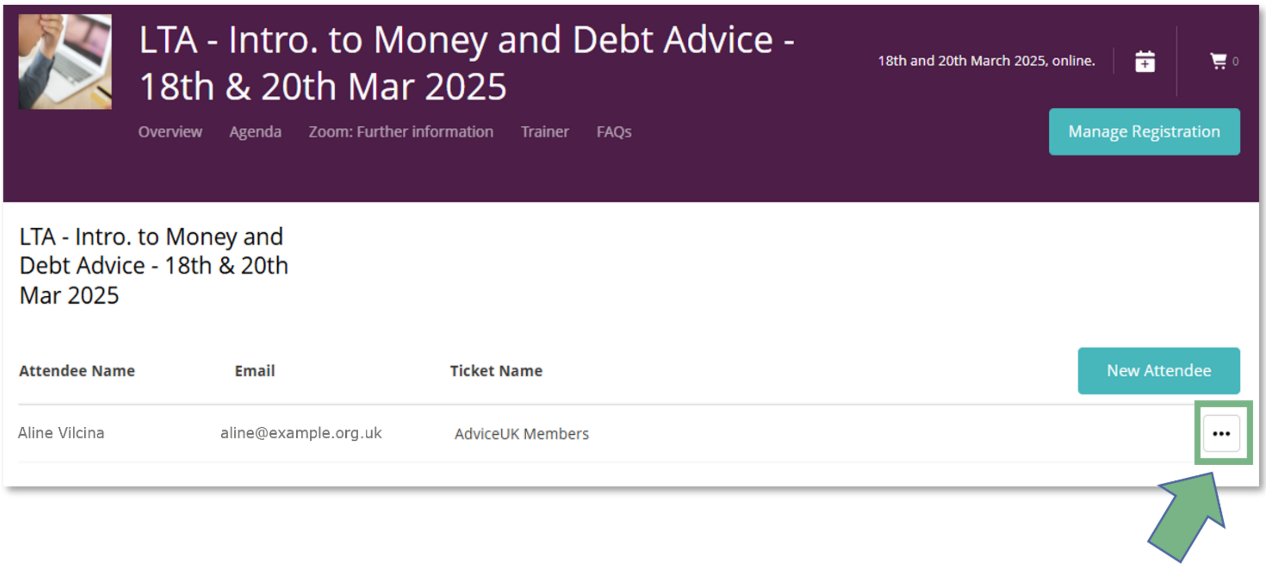
4. You'll see the attendee(s) you've booked onto the course

Transfer registration to someone else

If you've booked the wrong person or need to swap them, it's best to correct this as soon as possible, so any communications about the training go to the correct person.

1. Log in, using the same account you used to book
2. Go to the course/event
3. Click on the green "Manage Registration" button, towards the top right of your screen (steps continue next page)

4. Click on the ellipses (the three dots) to the right of the name of the person you wish to swap



5. Select "Transfer Registration"
6. Start to type in the new attendee's name in the "Search attendee" box. If they're on the system, their name will come up for you to select. If not, click on "Add" and enter in their details, following the prompts on-screen
7. Click "Transfer"
8. Click "Transfer" again on the box that appears
9. It's now been transferred on the system, but it's important you also get in touch with us to let us know you've made a change, as we don't receive a notification

Add another attendee onto the same course

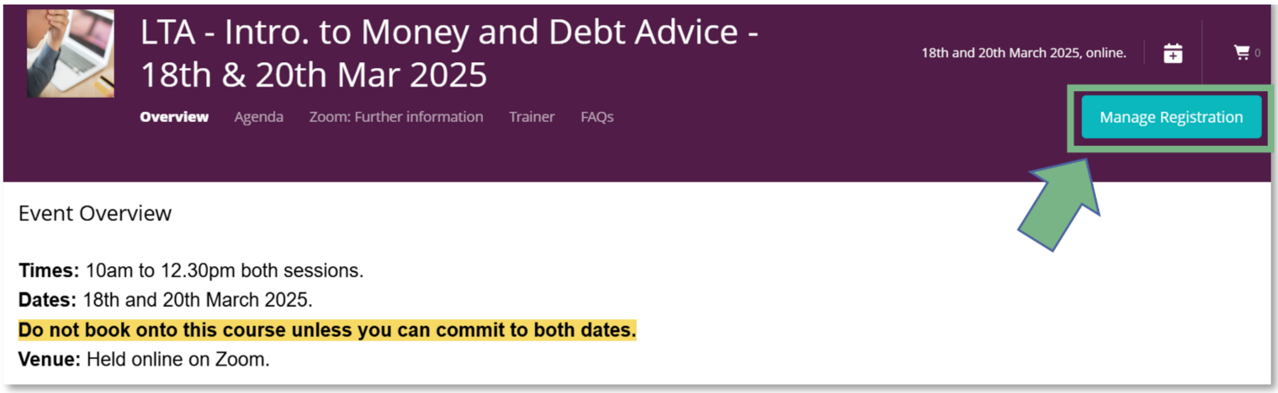
1. Log in, using the same account you used to book
2. Go to the course/event
3. Click on the green "Manage Registration" button, towards the top right of your screen
4. Towards the right side of the page, select "New Attendee" (steps continue next page)

5. You'll be automatically redirected to the ticket page, where you can select the relevant ticket(s), click "Continue". Complete the same steps you would if you were making a booking straight from a course page.

Correct attendee details

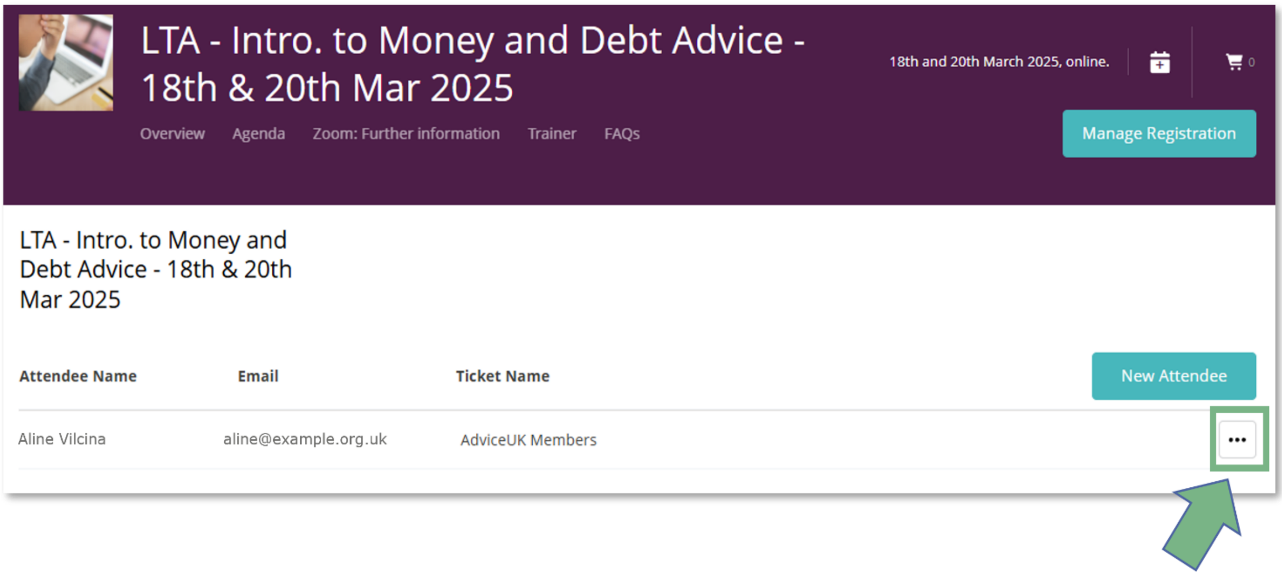
It's best to do this as soon as possible. You can edit the Attendee Role and Accessibility requirements but you **cannot** edit the First name, Last name or email fields; for these fields get in touch with us.

1. Log in using the same account you used to book
2. Go to the course/event
3. Click on the green "Manage Registration" button, towards the top right of your screen. It may take a moment to load



(steps continue next page)

4. Click on the ellipses (the three dots) to the right of the name of the person you wish edit



5. Select "Edit Order Detail"
6. This takes you to the Attendee Details page. Amend as needed
7. Click "Save". The process is complete

Payment options

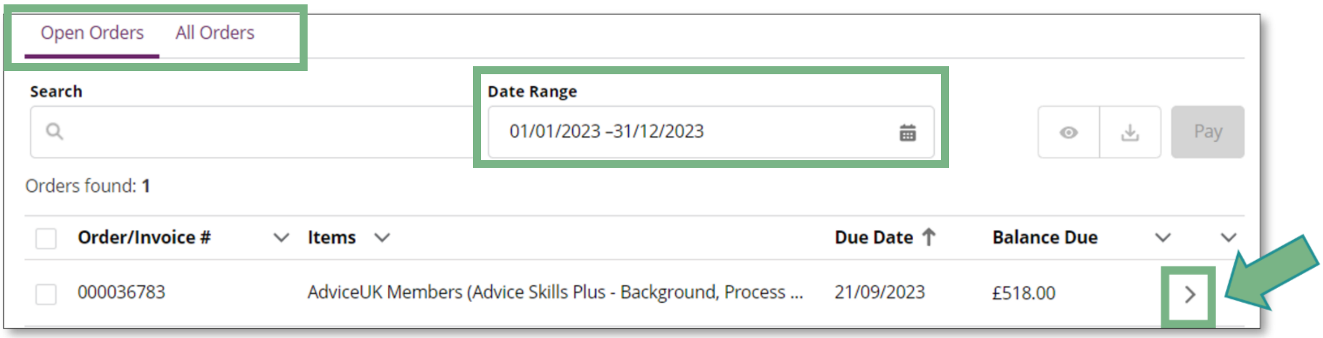
You can pay either via card (credit or debit) or by invoice.
If paying by card, make sure you have access to any authentication processes that may be in place via your bank.

Invoices on the Portal

A button to view the invoice is available on the confirmation page when you've finished making the booking. To access invoices on the Portal at any time:

1. Log in using the same account you used to book. You'll be taken to your "Profile" page
2. In the menu on the left of your screen, go to "My Orders". Invoices for bookings that you have made using your account can be found here (steps continue next page)

3. If an invoice still requires payment, it'll appear in "Open Orders". To see all orders (i.e. Paid or not paid), click on "All Orders"
4. Check and edit the Date Range if needed, especially if you have invoices from the previous calendar year
5. Click on the arrow towards the right of the page



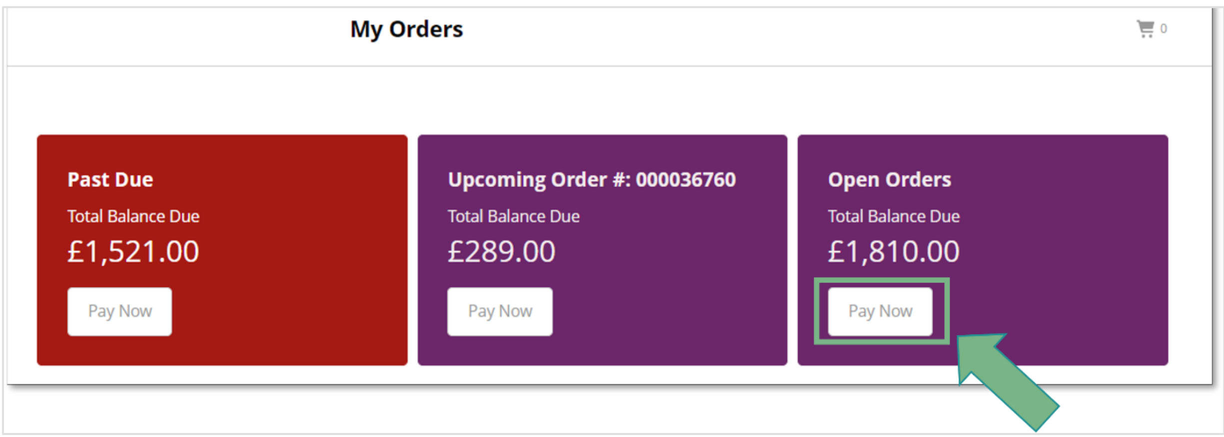
6. This opens the invoice in a side menu, where you can view and download it to your computer.

How to pay an invoice

There are a couple of ways to do this. These instructions assume you're already in the "My Orders" section of your profile, as instructed above.

To pay all invoices by card

1. Depending on the status of your invoice(s), amounts are grouped as "Past Due", "Upcoming Order" or "Open Orders". Go to the relevant box and click on "Pay Now" (steps continue next page)

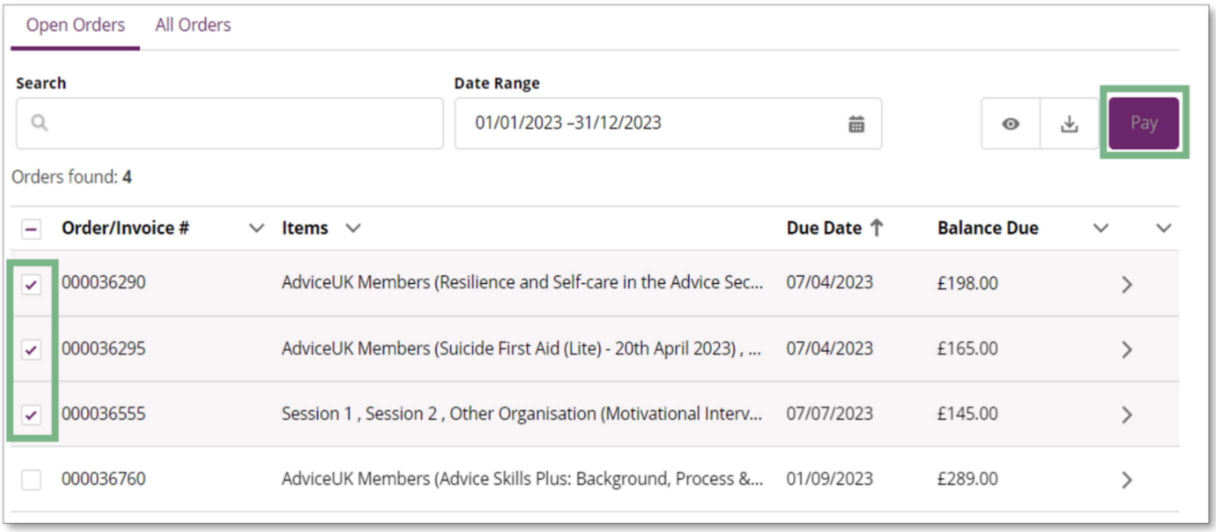


2. You'll be taken to a Checkout page where the relevant invoices will appear on the left side, all automatically selected
3. Click "Continue"
4. The "Choose a Payment Method" section will expand for you to enter in your card details
5. Complete them as required and click on "Process Payment"

To pay select invoices by card

When paying by card - depending on your/your organisations bank - you may need to authorise the payment. Make sure you're ready to do this when making a payment, otherwise the transaction may not go through

1. Select the relevant invoices by ticking the checkboxes on the left
2. Click on the purple "Pay" button towards the right of your screen



3. You'll be taken to a Checkout page where the relevant invoices will appear on the left-hand side
4. Click "Continue"
5. The "Choose a Payment Method" section will expand for you to enter in your card details
6. Complete them as required and click on "Process Payment"

To pay by BACS

Refer to the information at the bottom of your invoice to pay via BACs.

Help with invoices

Our Finance team are best placed to help you. You can either:

- Find their contact details on your invoice
- Email them directly if you already have their email
- Or use our contact form and select “Finance” as your area of interest

How to get in touch

To get in touch with the Training team, you can:

- Email us directly if you already have our email
- Or, use our contact form to get in touch with us (select "Training and Qualifications" as your area of interest).

The contact form can also be used to get in touch with other teams, e.g. Membership, Policy & Public Affairs, etc.

We do not freely share the majority of our phone numbers or emails as we still receive calls from members of the public seeking advice; AdviceUK does not give advice to members of the public. We’re a membership organisation for advice centres only. Unfortunately, we also receive spam and phishing emails, so not directly sharing our contact details helps reduce this.