



Continuous
Professional
Learning

Instructor Handbook and Working Procedures

Version 1.0 - 15 July 2026

Document Control

Field	Details
Document reference	CPL-INS-01
Document title	Instructor Handbook and Working Procedures
Version	1.0
Issue date	15 July 2026
Document owner	Training Manager / Quality and Compliance Manager
Approved by	Derek Donohoe, Associate Director
Status	Controlled document
Review cycle	Annual or following a material change to requirements

Record of Reviews and Amendments

Version	Date	Summary of changes
1.0	15 July 2026	Initial issue

Associated Documents

- CM 04 Recruitment and Management of Instructors Approval Status V1.1, 25 March 2026.
- CM 05 Instructor Training Induction V1.1, 25 March 2026.
- ADMIN 06 Confirming Trainers' Attendance for Upcoming Courses V1.0, 16 March 2026.
- SMT 03 Booking a Trainer on ARLO V1.0, 25 March 2026.
- CPL Institute Induction Training V3.6, 19 May 2026.
- Introduction to Zoom for Instructors V1.0, 1 September 2025.
- Code of Conduct for Staff and Instructors V2.1, 24 August 2023.
- Contact Information V1.3, 11 March 2026.
- Guidelines for Instructors: Using Online Synchronous Delivery Methods Effectively V1.0, 31 January 2026.
- Invoicing Guide and Paperwork Returns for Instructors V1.0, 12 September 2025.
- CPL Institute digital QQI assessment and Airtable marking instructions, July 2026.
- Supervisory Management portfolio and skills demonstration assessment rubrics, July 2026.
- CPL Institute digital PHECC examination and skills assessment process, July 2026.

Controlled document: This handbook must be read with the current course pack, lesson plan, assessment materials, awarding-body requirements, Instructor Agreement, Service Level Agreement and CPL Institute policies. Where a course-specific instruction differs, the current controlled course instruction takes precedence.

Contents

1. Purpose and Status of this Handbook	6
2. About the CPL Institute	6
2.1 Core values	6
2.2 Quality Management System.....	6
3. Scope and Categories of Instructor.....	6
4. Instructor Recruitment and Approval	7
4.2 Interview and competency review	7
4.3 Contractual and mandatory onboarding requirements	7
4.4 Approval on Airtable, ARLO and awarding-body systems	8
5. Maintaining Qualifications, Certification, Insurance and CPD	8
5.1 Personal responsibility.....	8
5.2 Minimum continuing requirements by course family	8
5.3 CPD records	9
5.4 Insurance	9
5.5 Consequences of expired or missing evidence.....	9
6. Receiving, Accepting and Recording a Booking.....	9
6.1 How instructors are selected	9
6.2 Actions when offered work	9
6.3 Calendar invitation	10
6.4 One-week confirmation	10
7. Course Preparation.....	10
7.1 Review the controlled course pack	10
7.2 Approved materials only	11
7.3 Course packs	11
7.4 Affiliate course registration	11
7.5 Children, young people and vulnerable adults	11
8. Professional Conduct and Safeguarding	11
8.1 General conduct.....	11
8.2 Boundaries and disclosures	11
8.3 Safe supervision	11
8.4 Changes in legal or professional status	12
9. Delivering the Course	12
9.1 Before learners arrive.....	12

9.2 Opening the course	12
9.3 Teaching practice	12
9.4 Learner feedback.....	13
10. Attendance and Learner Identity	13
10.1 Classroom attendance	13
10.2 Day-one attendance return	13
10.3 Online attendance	13
10.4 Attendance concerns.....	13
11. Digital Assessment, Marking and Academic Integrity	13
11.1 General digital assessment requirements.....	13
11.2 Online examinations	13
11.3 Projects, portfolios and skills demonstrations	14
11.4 Completing an online marking form.....	14
11.5 Partially completed skills demonstration forms	15
11.6 Reasonable accommodation	15
12. Live Online and Zoom Delivery	15
12.1 Technology preparation	15
12.2 Starting and managing the meeting.....	15
12.3 Engaging learners online	15
12.4 Technical problems	16
13. Incidents, Complaints and Escalation.....	16
14. Course Records, Security and Data Protection	16
15. Course Returns and Post-Course Actions	16
15.1 Required returns.....	16
15.2 Postal address.....	17
16. Invoicing and Payment	17
16.1 Invoice preparation	17
16.2 Submission and payment.....	17
17. Cancellations, Illness and Substitution	18
18. Monitoring, Feedback and Performance Management	18
19. Consultancy and Contribution to Quality Improvement	18
20. Contact Information	18
20.1 Key contacts.....	19
21. Practical Checklists	19

21.1 Before accepting a booking	19
21.2 After accepting	19
21.3 One week before	19
21.4 On the day	19
21.5 After the course	20
22. Appendix A: Managing a QQI Course	20
A1. Before the course	20
A2. At course commencement	20
A3. During teaching and formative assessment	20
A4. Online examinations	21
A5. Learner uploads	21
A6. Marking projects and portfolios	21
A7. Marking skills demonstrations	21
A8. Results and communication	21
A9. QQI course close-out checklist	21
23. Appendix B: Managing a PHECC Course	22
B1. Before the course	22
B2. Course registration and attendance	22
B3. Theory examination	22
B4. Skills assessment	22
B5. Assessment decisions and learner communication	23
B6. Incidents, remediation and unsuccessful outcomes	23
B7. PHECC course close-out checklist	23
24. Instructor Acknowledgement	Error! Bookmark not defined.

1. Purpose and Status of this Handbook

This handbook provides practical, step-by-step instructions for instructors who deliver training and education services on behalf of the CPL Institute. It explains what must be completed before approval, how work is offered and accepted, how courses must be prepared and delivered, how records are returned, and how instructors must maintain their qualifications, insurance, certification, professional approvals and continuing professional development (CPD).

The handbook is an operational guide. It does not replace an instructor's contract, Service Level Agreement, awarding-body rules, legislation, the CPL Institute Quality Management System or course-specific controlled documents. Instructors must use the most recent version provided by the CPL Institute.

2. About the CPL Institute

The CPL Institute has operated since 1987, originally as Nifast, became part of the Cpl Group in 2009 and was rebranded as the CPL Institute in 2015. It provides programmes accredited or approved by QQI, IOSH, PHECC, the Irish Heart Foundation, the RSA and the CPL Institute. Its training systems are supported by an ISO 9001:2015 quality management framework.

2.1 Core values

- Customer focus
- Accountability
- Respect
- Effective communication
- Empowerment

2.2 Quality Management System

Every instructor contributes to the effectiveness of the Quality Management System. The system includes governance, programme approval, staff recruitment and development, teaching and learning, assessment, learner supports, information management, public information, management of third parties, monitoring, self-evaluation and continuous improvement.

Instructor responsibility: Follow controlled procedures, report problems promptly, cooperate with monitoring and audits, use approved materials, protect records, and complete corrective actions within the agreed timeframe.

3. Scope and Categories of Instructor

This handbook applies to employed instructors, associate or subcontracted instructors, PHECC faculty and affiliate faculty, substitute instructors, tutors and any other person contracted to provide education, assessment or consultancy services for the CPL Institute. It applies to classroom, client-site, hotel, live online and any other approved mode of delivery.

Approval is course specific. An instructor who is approved for one subject or awarding body is not automatically approved for another. Only instructors recorded as approved on ARLO may be booked to deliver the relevant course.

4. Instructor Recruitment and Approval

4.1 Initial application

The Training Manager manages the recruitment and approval process. The instructor must complete the application form issued by the CPL Institute. The information is recorded in Airtable and supporting evidence is reviewed before approval.

Evidence	Required action
Current CV	Provide at application and update when qualifications or experience materially change.
References	Provide suitable, current references. The CPL Institute may contact referees before interview.
Qualifications and certificates	Provide all subject, teaching, practitioner, instructor and awarding-body certificates relevant to the proposed course areas.
CPD evidence	Provide current evidence of required technical, professional, clinical and teaching CPD.
Insurance	Provide valid public liability and professional indemnity insurance, and employers' liability where relevant.
Garda vetting	Provide evidence where the work involves children, young people, vulnerable adults or a client requires it.
Professional membership or registration	Provide evidence where required by the relevant scheme or course.

4.2 Interview and competency review

- Attend an interview or competency discussion with the Training Manager.
- Explain relevant technical knowledge, industry experience, training experience and assessment experience.
- Agree the courses you may deliver, geographic coverage, availability, equipment arrangements and delivery modes.
- Agree the monitoring, observation and performance-review arrangements that will apply.
- Provide additional evidence or complete a practical demonstration where requested.

4.3 Contractual and mandatory onboarding requirements

- Sign the Instructor Agreement and associated Service Level Agreement.
- Agree to the CPL Institute Code of Conduct, confidentiality, quality and data protection requirements.
- Complete GDPR eLearning.
- Complete Equality and Diversity Awareness eLearning.
- Complete the CPL Institute induction programme.
- Complete a Zoom test session where online or technology-supported delivery may apply.
- Complete safeguarding induction and Garda vetting where required.
- Confirm that the CPL Institute has the correct email address, mobile number, home/postal address and payment details.

4.4 Approval on Airtable, ARLO and awarding-body systems

The Training Manager records approved status on Airtable and enters the instructor on ARLO. ARLO is the controlled scheduling record used to identify instructors by approved course type and location. For PHECC faculty, the CPL Institute also maintains the applicable PHECC portal affiliation and named faculty forms. The instructor must not deliver until written approval is confirmed.

5. Maintaining Qualifications, Certification, Insurance and CPD

5.1 Personal responsibility

The instructor is personally responsible for maintaining every qualification, approval, registration, licence, professional membership, insurance policy and CPD requirement needed for the work accepted. The CPL Institute monitors expiry dates and conducts annual reviews, but this does not transfer responsibility from the instructor.

- Maintain a personal expiry-date register and renewal calendar.
- Begin renewal early enough to avoid a gap in approval.
- Send renewed evidence to support@cplinstitute.com immediately after issue.
- Do not accept or deliver work where a required credential will be expired on the course date.
- Notify the Training Manager immediately of suspension, restriction, investigation, cancellation or any other material change.
- Attend required standardisation, monitoring, refresher and awarding-body update activities.

5.2 Minimum continuing requirements by course family

Course family	Continuing requirements
QQI programmes	Maintain the subject qualification, teaching/training qualification and professional experience approved for the programme. Normally, the subject qualification should be at least one NFQ level above the level delivered unless the approved programme criteria state otherwise. Participate in assessment standardisation, internal verification and external authentication activity when requested.
PHECC Faculty	Maintain valid practitioner and instructor certification appropriate to the course, comply with the relevant PHECC education and training standard, maintain required course-delivery evidence, complete recertification within the required period and complete CPG upskilling. Evidence of upskilling for new CPGs must be provided within 18 months or sooner if directed.
IOSH Managing Safely/Working Safely	Maintain the required IOSH membership grade, CPD in good standing, adult training qualification or recognised delivery experience, and current approval/licence for the course.
Other regulated or scheme-owner courses	Maintain the current instructor, assessor, licence, registration, medical, driving or professional requirements specified by the scheme owner and the CPL Institute.

5.3 CPD records

Keep evidence of CPD in a form that can be reviewed during the annual approval process. Records should show the date, activity, provider, duration, learning achieved, relevance to courses delivered and any action taken.

- Technical and industry updates
- Awarding-body or regulatory updates
- Teaching, learning and assessment development
- Equality, diversity and inclusion
- Safeguarding and learner welfare
- Online and digital delivery
- Health and safety
- Standardisation, moderation and communities of practice
- Reflective practice following learner feedback or monitoring

5.4 Insurance

Maintain adequate cover with a reputable insurer. The required cover normally includes public liability and professional indemnity insurance, and employers' liability where the instructor's business employs staff. Send renewal evidence promptly. Do not deliver if insurance has lapsed, been cancelled or no longer covers the activity.

5.5 Consequences of expired or missing evidence

Where required evidence is expired, missing or under investigation, approved status may be removed from ARLO, and bookings may be reassigned or cancelled. The instructor must not deliver or represent themselves as approved until written confirmation is restored. Remediation, refresher training or additional monitoring may be required.

6. Receiving, Accepting and Recording a Booking

6.1 How instructors are selected

The Sales Team checks the approved Presenter Schedule in ARLO and filters by course type, location and availability. The instructor may be contacted by telephone, text, WhatsApp or email to confirm availability.

6.2 Actions when offered work

- Review the course title, accreditation, date, start and finish time, location, delivery method, expected learner numbers and client requirements.
- Confirm that you are approved and that all qualifications and insurance will remain valid on the course date.
- Allow for travel, parking, venue access, equipment setup and close-out time.
- Reply promptly and state clearly whether you accept or decline.
- After accepting, do not take conflicting work. Treat the booking as a firm professional commitment.
- Review the formal confirmation immediately and report errors or missing information.

Controlled booking record: ARLO and the formal CPL Institute booking confirmation are the controlled records. Personal diary notes or a WhatsApp exchange do not replace them.

6.3 Calendar invitation

- Open the calendar invitation and select Accept or Yes.
- Confirm that the event has been added to the correct personal calendar.
- Check every date of a multi-day or recurring course.
- Check the time zone, especially for online delivery.
- Add private reminders for travel, equipment, preparation and return deadlines.
- Do not alter or forward the CPL Institute invitation without permission. Contact the booking team where a correction is needed.

6.4 One-week confirmation

One week before the course, the Training Administration Team will contact the instructor by WhatsApp or email to confirm that the course is in the diary. The instructor must respond on the same day where reasonably possible.

Situation	Required reply/action
Available and prepared	Confirm that the date is in your diary and that you remain available. Confirm receipt of the pack or state when it is expected.
Details differ from your records	State the discrepancy immediately and wait for clarification.
Pack or key information has not arrived	Confirm availability but identify what is missing. Contact support immediately.
No longer available	State this immediately and telephone the CPL Institute. Do not wait until the course date.
No WhatsApp	Reply by email or telephone as instructed.

When confirmation is received, the Training Administrator records it in the ARLO course notes. If the instructor is no longer available, the matter is escalated to the Operations Chat and Sales Team so that an approved replacement can be found.

7. Course Preparation

7.1 Review the controlled course pack

- Booking confirmation and client instructions reviewed.
- Current lesson plan, timetable, presentation and learner materials reviewed.
- Assessment requirements and marking guidance reviewed.
- Instructor-to-learner ratio checked.
- Venue address, parking, access, room arrangements and contact confirmed.
- Learner numbers, accessibility needs and reasonable accommodations reviewed.
- Equipment, consumables and backup arrangements checked.
- Attendance, feedback and return instructions identified.
- Emergency contact details saved.

7.2 Approved materials only

Use only the current CPL Institute presentations, lesson plans, handouts, learner handbooks, assessments and forms. Do not replace, edit, rebrand, photocopy or distribute controlled material unless authorised. Request additional copies from Training Administration. Store all assessment material securely.

7.3 Course packs

Course packs are normally sent to the training location or instructor approximately one week before the course. Check the pack immediately on receipt. Confirm that learner numbers, assessment papers, forms, labels, envelopes and course-specific documents are complete. Report shortages before the course starts.

7.4 Affiliate course registration

Affiliate instructors must allow at least seven days for course registration unless flexibility has been specifically agreed. Learners must be told that the instructor is delivering through a third-party/affiliate relationship with the CPL Institute. The CPL Institute presentation, paperwork, approved assessment and logo must be used.

7.5 Children, young people and vulnerable adults

Tell the CPL Institute at booking stage if learners are under 18 or are vulnerable persons. Do not attend such a course unless the required Garda vetting, safeguarding induction and client controls are confirmed.

8. Professional Conduct and Safeguarding

8.1 General conduct

- Be courteous and acknowledge communications promptly.
- Dress professionally and comply with client-site dress, PPE and safety requirements.
- Take reasonable care for the health, safety and welfare of everyone present.
- Do not use offensive, foul or sexualised language.
- Do not attend or deliver while impaired by alcohol, illegal drugs or any substance that prevents competent performance.
- Respect cultural differences and the principles of equality, diversity and inclusion.
- Do not discriminate on the grounds of gender, disability, age, religion, family status, race, civil status, sexual orientation or membership of the Traveller community.
- Do not bully, shout at, humiliate, harass or intimidate learners.
- Use positive reinforcement and model appropriate professional behaviour.

8.2 Boundaries and disclosures

Maintain appropriate professional boundaries with learners. A learner must not be discouraged from making a disclosure or complaint. Listen calmly, record the facts and report the concern immediately. Do not promise confidentiality and do not investigate a safeguarding concern yourself.

8.3 Safe supervision

- Know who is responsible for supervision and who is present.
- Do not leave children or young people unattended.

- Ensure suitable adult-to-child ratios. The Code of Conduct identifies one adult to six children/young people as best practice.
- Ensure adults responsible for a group know where participants are and what they are doing.
- Follow the client or placement safeguarding policy where it applies and has precedence for the activity.

8.4 Changes in legal or professional status

Immediately notify the Training Manager of charges that may lead to conviction, changes to Garda vetting, restrictions on practice, professional disciplinary matters, insurance cancellation or any matter that could affect suitability to work with learners.

9. Delivering the Course

9.1 Before learners arrive

- Arrive early enough to set up fully.
- Complete a visual safety check of the room and equipment.
- Confirm emergency arrangements and facilities.
- Display or prepare the approved materials.
- Secure controlled assessments until required.
- Confirm attendance and learner identity arrangements.

9.2 Opening the course

- Welcome learners and introduce yourself and the CPL Institute.
- Confirm the course title, accreditation/approval and learning outcomes.
- Explain the timetable, breaks, facilities and emergency arrangements.
- Explain attendance, participation and assessment requirements.
- Explain access, transfer, progression and recognition of prior learning where relevant.
- Signpost learner supports, reasonable accommodation, complaints and appeals procedures.
- Explain expected standards of conduct and participation.
- Identify any additional support need discreetly and contact the CPL Institute where guidance is required.

9.3 Teaching practice

- Follow the approved lesson plan and timetable while adapting examples and explanations to learner needs.
- Use adult-learning methods, workplace examples, demonstrations, questioning, discussion and practice.
- Accommodate different learning styles and cultural backgrounds without lowering learning outcomes or assessment standards.
- Maintain the approved instructor-to-learner ratio.
- Use sufficient, current resources and check understanding throughout.
- For PHECC courses, comply with current PHECC education and training standards and Clinical Practice Guidelines.
- Do not promise certification. Explain that certification depends on successful completion, verified records and the awarding-body process.

9.4 Learner feedback

Allocate time at the end of the course for learners to complete the online feedback form using the QR code or website link. Pass the learner feedback QR sheet around the classroom and encourage completion before learners leave. Complete the separate Instructor Feedback form for every course. The QR code is normally provided on the course pack cover sheet.

10. Attendance and Learner Identity

10.1 Classroom attendance

Complete the controlled attendance sheet accurately. Record arrival, late attendance, absence and any course-specific attendance requirement. Never sign on behalf of a learner.

10.2 Day-one attendance return

Email the attendance sheet to attendance@cplinstitute.com by midday on the first day of the course. Include the course title, course date and course reference where available.

10.3 Online attendance

For live online delivery, cameras must be on for attendance and participation checks. Take attendance screenshots showing participant names and cameras on. Email the screenshot on the first day to attendance@cplinstitute.com with the course name and date. Where a camera cannot be used because of an agreed accommodation or verified technical issue, contact Administration for direction.

10.4 Attendance concerns

Report non-attendance, repeated disconnection, late arrival, early departure, identity concerns or failure to meet mandatory attendance requirements promptly. Do not decide independently that a learner may progress or be certified where requirements have not been met.

11. Digital Assessment, Marking and Academic Integrity

11.1 General digital assessment requirements

- Use only the current assessment link, approved assessment instrument, rubric and assessor guidance issued by the CPL Institute for the named course and assessment technique.
- Keep assessment links, learner information, rubrics, assessor-only guidance and results secure. Do not forward a marking link or assessor guidance to a learner or unauthorised person.
- Apply the approved rubric consistently. Select the descriptor that best matches the learner evidence and enter clear evidence-based comments in the required feedback fields.
- Do not coach a learner during a summative assessment beyond the permitted instructions.
- Report suspected plagiarism, collusion, impersonation, unauthorised assistance or other irregularity.
- Do not manipulate a mark, override an automatically calculated result, resubmit a duplicate record or promise a particular outcome. Report any suspected calculation or system error immediately.

11.2 Online examinations

- Use the course-specific online examination link supplied through the approved CPL Institute process. Confirm that the correct course, assessment and learner record are displayed before the learner begins.

- Explain the assessment conditions, identity requirements, permitted materials and academic integrity requirements before access is provided.
- Supervise the assessment in accordance with the course requirements and ensure that each learner accesses and submits their own response.
- Record and report interruptions, technical failures, suspected malpractice, identity concerns or any other assessment irregularity immediately.
- Confirm that the learner has submitted the online assessment successfully before leaving the assessment session. Do not ask the learner to submit a second response unless authorised by Administration.
- Where an examination requires instructor marking or verification, use the approved Airtable-linked form and rubric. Complete all required fields and confirm submission.

11.3 Projects, portfolios and skills demonstrations

- Explain the assessment brief, evidence requirements, rubric criteria, deadline and submission process without writing, rewriting or materially correcting the learner's work.
- Learners upload projects, assignments and portfolios directly to the Airtable database using the unique submission link issued automatically from ARLO. Instructors must not accept submissions through personal email, WhatsApp or another unapproved route.
- Mark learner evidence using the course-specific online marking form and approved rubric. Historic paper marking sheets are no longer used unless the CPL Institute issues an authorised contingency form.
- Complete the online skills demonstration marking form while observing the learner. Enter the instructor email address and mark each completed task against the rubric. Where tasks occur on different days, submit the partially completed form and use the emailed return link to continue the same learner record.
- On final submission, the Airtable record automatically calculates the score, percentage, grade and pass or unsuccessful status. Check the displayed information for obvious errors and report any discrepancy rather than creating a duplicate record.
- For successful QQI results, the learner is automatically emailed the calculated outcome and the comments entered in Areas of Good Practice and Areas for Improvement. For an unsuccessful result, the assigned Training Administrator contacts the learner directly. Instructors must not issue a separate result notification unless requested.

11.4 Completing an online marking form

- Open the course-specific marking link supplied by the CPL Institute. Do not reuse a bookmarked link unless you have confirmed that it is still the current approved version.
- Select or enter the correct learner and course details. Check spelling and identifiers before marking.
- Review the complete learner evidence and the approved rubric before selecting marks.
- Award marks only against the stated criteria and evidence. Do not award discretionary marks outside the rubric.
- Complete Areas of Good Practice with specific evidence of what the learner did well.
- Complete Areas for Improvement with clear, constructive and outcome-focused feedback.
- Review all entries before final submission. Once submitted, do not create a replacement record to correct an error. Contact Administration so the controlled record can be amended.

- Retain the automated submission confirmation email until the course assessment process has been completed.

11.5 Partially completed skills demonstration forms

- The instructor email address is required so that the system can send a secure continuation link.
- Marking fields may be left incomplete where tasks are scheduled across different times or days.
- Submit the partially completed form at the end of the assessment session. The system will email a summary of the completed fields and a link to reopen the same record.
- Use the emailed link to continue. Do not start a new form for the same learner unless instructed by Administration.
- On the final day, check that every required task and feedback field has been completed before the final submission.

11.6 Reasonable accommodation

Reasonable accommodation must support access without changing the learning outcomes or giving an unfair advantage. Do not make an unapproved change to assessment conditions. Refer the request to the CPL Institute, record the approved arrangement and follow the written direction.

12. Live Online and Zoom Delivery

12.1 Technology preparation

- Complete the CPL Institute Zoom test call before first online delivery.
- Test internet, microphone, camera, speakers, presentation and screen sharing before each session.
- Use a quiet, well-lit environment and the CPL Institute background.
- Have a backup plan and the Administration Team contact details available.
- Open the meeting early enough to resolve issues before learners join.

12.2 Starting and managing the meeting

- Log into the authorised Zoom account and select Meetings.
- Locate the scheduled meeting and select Start.
- Admit learners from the waiting room and check participant names.
- Explain muting, raise-hand, chat, camera and participation expectations.
- Monitor the participant list, chat and non-verbal cues throughout.
- Do not share the host login or meeting link outside the approved learner group.

12.3 Engaging learners online

- Share clear objectives and an agenda at the start.
- Use check-ins, open questions, polls, chat, annotation and quizzes.
- Use breakout rooms for case studies, discussion and collaborative activities.
- Call on learners by name sensitively and acknowledge contributions.
- Pause regularly for questions and summaries.
- Offer several participation routes, including speaking, chat and reactions.
- Use breaks and vary activity to maintain attention and support wellbeing.
- Speak clearly and pace the session for varying connectivity.

12.4 Technical problems

For urgent Zoom issues, especially inability to start a meeting, contact the Administration Team immediately on 01 895 5755, or email support@cplinstitute.com. Record significant outages and the effect on attendance, learning time or assessment.

13. Incidents, Complaints and Escalation

Contact the CPL Institute immediately for any matter that may affect safety, learner welfare, assessment validity, certification, client requirements, data protection or reputation.

Issue	Instructor action
Medical emergency or safety incident	Follow emergency procedures, make the area safe, contact emergency services where needed and notify the CPL Institute.
Safeguarding disclosure or concern	Listen, record facts, protect immediate safety, report immediately and do not investigate.
Learner complaint	Listen respectfully, record the complaint and refer it to the CPL Institute. Do not promise an outcome or admit liability.
Assessment irregularity	Secure the evidence, note facts and contact the Quality/Training Manager.
Venue or equipment problem	Contact Administration/client contact immediately and do not continue where safe or compliant delivery is not possible.
Data breach or lost records	Stop further disclosure, preserve evidence and report immediately.
Course cancellation or insufficient attendance	Contact the CPL Institute before releasing learners or making commitments.

14. Course Records, Security and Data Protection

- Use current CPL Institute forms and approved systems only.
- Complete every field clearly and accurately. Do not use correction fluid on controlled records.
- Keep learner personal data confidential and disclose it only to authorised staff.
- Do not retain learner identification, assessment, results or contact details after secure transfer unless authorised.
- Do not send confidential learner information through personal messaging or unapproved cloud storage where an approved route is available.
- Protect course packs, assessments and devices from loss, theft and unauthorised access.
- Report lost, damaged, misdirected or unauthorised access to records immediately.
- Return or securely delete records when instructed.

15. Course Returns and Post-Course Actions

15.1 Required returns

Assessment evidence and marking records are now normally retained through the approved Airtable-linked systems. Instructors must complete all online assessment actions and verify successful submission. Any remaining controlled paper records, including attendance or client/Skillnet documents,

must be returned by Express Post within the stated course deadline. Do not print or retain unnecessary copies of digital assessment records.

- Original attendance records completed and returned.
- All online examination, marking and skills assessment forms submitted and confirmation received.
- Learner feedback opportunity provided and Instructor Feedback completed.
- Required digital skills evidence and assessment records uploaded or linked through the approved process and verified.
- Unused controlled materials returned where required.
- Incidents, absences, unsuccessful outcomes or follow-up actions reported.
- Course pack checked for completeness before posting.
- Proof of postage retained for expense claim.

15.2 Postal address

FAO: Training Administration Team
The CPL Institute
1st Floor, 5 St. Fintan's
North Street
Swords
Co. Dublin
K67 PY20

Address check: Use the address shown on the current course pack or contact guide. Contact support before posting if the address differs between documents.

16. Invoicing and Payment

16.1 Invoice preparation

- Use the CPL Institute invoice template. Request a copy from invoiceus@cplinstitute.com if needed.
- Include the name and address of the individual or organisation invoicing.
- Use a unique invoice number.
- Date the invoice the first day of the month being claimed, for example 1 April for April delivery.
- Itemise each course or service, date and agreed fee.
- Include pre-agreed expenses and attach receipts.
- Include paid postage for course returns with a receipt where applicable.
- Show the total amount due.

16.2 Submission and payment

Submit the invoice by the end of the same month in which the work was completed. Send it only to invoiceus@cplinstitute.com and not to an individual staff member. The Administration Team will confirm receipt. Payment is normally made on the first Friday of the following month, subject to a correct invoice, completion of required course returns and the terms of the Instructor Agreement.

Example: Training delivered during August should be included on an invoice dated 1 August, submitted by 31 August and is normally paid on the first Friday in September.

17. Cancellations, Illness and Substitution

After accepting a booking, the instructor is expected to deliver it. If illness, emergency or another unavoidable event may prevent delivery, telephone the CPL Institute immediately and follow with written confirmation. Do not arrange your own substitute. Only the CPL Institute may appoint a replacement, and the replacement must be approved for that course and receive the correct controlled materials and instructions.

18. Monitoring, Feedback and Performance Management

- Cooperate with announced and unannounced monitoring, observation, audit, internal verification, external authentication and client review.
- Complete Instructor Feedback after every course and encourage learner feedback.
- Review monthly feedback reports and use them for reflection and CPD.
- Attend standardisation and course update meetings.
- Use updated materials from the effective date and stop using superseded versions.
- Complete corrective actions, refresher training or additional monitoring within the agreed timeframe.
- Participate in annual approval renewal and provide requested evidence.

Unsatisfactory performance, breach of the Code of Conduct, Service Level Agreement, awarding-body standard or quality procedure may result in investigation, temporary removal of ARLO approval, disciplinary action, remediation or termination of affiliation. During an investigation, the instructor must not deliver unless written permission is provided.

19. Consultancy and Contribution to Quality Improvement

Experienced instructors may be asked to contribute to programme design, course material development, assessment development, self-evaluation, improvement planning, Academic Council activity, course review or other quality improvement work. Such work must be agreed in advance and carried out under the relevant controlled process.

20. Contact Information

Purpose	Contact
Day-one attendance sheets and online attendance screenshots	attendance@cplinstitute.com
Learner, instructor, client and operational support	support@cplinstitute.com
Instructor invoices	invoiceus@cplinstitute.com
Dublin main line	01 895 5755
Cork main line	021 462 6129
Postal course returns	The CPL Institute, 1st Floor, 5 St. Fintan's, North Street, Swords, Co. Dublin, K67 PY20

20.1 Key contacts

Role	Name
Associate Director	Derek Donohoe
Training Manager	Catherine Maher Dennis
Quality and Compliance Manager	Lorraine Conway
Sales Executive	Jenny Maguire
Sales Executive	Hollie Gavin
Sales Executive / Administration: FSS and IHF	Paula Fleming
Administration: QQI and IOSH	Agnieszka Kurowska
Administration: PHECC and TCI	Fan Gu

21. Practical Checklists

21.1 Before accepting a booking

- I am approved for this course.
- My qualifications, insurance and scheme approvals will be valid on the date.
- I can attend every required date and full scheduled time.
- I have allowed for travel and setup.
- I have reviewed the location, mode and client requirements.
- I have replied clearly to accept or decline.

21.2 After accepting

- I accepted the calendar invitation.
- I checked all dates, times and time zones.
- The booking is in my personal calendar.
- I set preparation and travel reminders.
- I reported any discrepancy.

21.3 One week before

- I replied to the WhatsApp/email confirmation.
- I confirmed the course is in my diary.
- I received and checked the course pack.
- I reviewed current materials and assessments.
- I confirmed equipment, venue and learner requirements.
- I raised missing information immediately.

21.4 On the day

- I arrived/logged in early.
- I completed safety and technology checks.
- I explained accreditation, attendance, assessment, supports and conduct.
- I used approved materials only.

- I maintained attendance and ratios.
- I protected assessment security.
- I provided time for learner feedback.

21.5 After the course

- I emailed day-one attendance evidence.
- I completed the current Airtable-linked assessment and marking forms and checked the confirmation.
- I completed Instructor Feedback.
- I completed the digital skills assessment record and uploaded or linked any required supporting evidence.
- I reported incidents, absences and incomplete outcomes.
- I returned any remaining controlled paper records within the required timeframe.
- I retained proof of postage.
- I invoiced by month-end using the correct email address.

22. Appendix A: Managing a QQI Course

This appendix provides the minimum operational sequence for instructors delivering and assessing a QQI course. Course-specific instructions, the validated programme, assessment brief, rubric and current online links take precedence.

A1. Before the course

- Confirm that you are approved on ARLO for the QQI programme and that your qualifications, insurance and CPD are current.
- Review the current programme timetable, lesson plan, assessment strategy, assessment briefs, rubrics, learner instructions, academic integrity statement and reasonable accommodation arrangements.
- Open and test the instructor marking links supplied for the course. Do not enter test data into a live assessment form. Report access problems before the course begins.
- Confirm how learners will receive registration, assessment and upload links automatically from ARLO.

A2. At course commencement

- Explain the QQI award title and code, attendance requirement, assessment techniques and weightings, submission deadlines, grading, feedback, appeals and certification process.
- Confirm learner identity and ensure that each learner uses the email address linked to their ARLO registration.
- Explain that project, assignment and portfolio evidence must be uploaded through the individual Airtable-linked submission route.
- Explain academic integrity, authorship, permitted support and AI-use requirements.

A3. During teaching and formative assessment

- Use formative questioning, practice and feedback to prepare learners, but do not complete summative evidence for them.
- Keep a record of attendance, support concerns and any approved reasonable accommodation.

- Escalate suspected plagiarism, impersonation, collusion, unauthorised assistance or system misuse.

A4. Online examinations

- Provide or supervise access only at the approved time and under the specified conditions.
- Confirm each learner submits their own response and receives a successful submission message.
- Record and report technical problems or assessment incidents. Do not direct a learner to submit a second attempt without authorisation.

A5. Learner uploads

- Remind learners that their ARLO-issued link is the approved submission route.
- Do not accept work through personal email, WhatsApp, USB device or another informal route without prior approval.
- Where a learner reports a failed upload, ask them to retain the error message and contact support@cplinstitute.com

A6. Marking projects and portfolios

- Open the correct learner evidence from the controlled assessment record and use the approved course rubric.
- Select marks that correspond to the demonstrated evidence. Apply the same standard to every learner.
- Complete Areas of Good Practice and Areas for Improvement in professional, specific and plain language. These comments may be sent automatically to the learner.
- Review the automatically calculated score, percentage, grade and status before closing the record.
- Report an error through Administration. Do not create a duplicate assessment record to correct it.

A7. Marking skills demonstrations

- Enter your own instructor email address so the continuation and audit emails are sent to you.
- Complete each rubric field as the task is observed. Base the mark on observable evidence.
- Where the demonstration occurs over more than one session, submit the incomplete form and use the emailed return link to continue the same record.
- Complete all remaining tasks and feedback before the final submission.

A8. Results and communication

- Successful learners may receive an automated email containing the calculated result and the instructor feedback.
- Where a learner is unsuccessful, the designated Training Administrator will contact them. Do not independently promise a repeat, extension, reassessment or certificate.
- Treat results as provisional until the CPL Institute assessment authentication and results approval process is complete.

A9. QQI course close-out checklist

- Day-one attendance sent to attendance@cplinstitute.com
- All learner submissions visible in the approved system.

- All required marking forms completed once only.
- Skills demonstration continuation records finalised.
- Feedback fields completed and suitable for learner issues.
- Assessment incidents and reasonable accommodation reported.
- Instructor feedback completed.
- Any remaining controlled paper records returned.

23. Appendix B: Managing a PHECC Course

This appendix sets out the instructor workflow for PHECC courses using the CPL Institute digital assessment process. The current PHECC Education and Training Standard, Clinical Practice Guidelines, course-specific instructions and approved assessment links take precedence.

B1. Before the course

- Confirm current CPL Institute faculty affiliation, PHECC instructor certification, required practitioner or responder certification, CPG upskilling, course activity requirements and insurance.
- Review the current PHECC course standard, lesson plan, presentation, assessment criteria, learner ratio, equipment ratio and digital assessment instructions.
- Test access to the approved examination and skills assessment links without entering live learner data.
- Confirm the equipment, consumables, manikins, AED trainers and hygiene arrangements required for the learner numbers.

B2. Course registration and attendance

- Deliver only a course registered through the CPL Institute and use only approved materials and branding.
- Verify learner identity, entry or recertification eligibility and attendance requirements.
- Send day-one attendance to attendance@cplinstitute.com and immediately report absences, late arrivals or eligibility concerns.

B3. Theory examination

- Provide learners with the approved Airtable-linked examination route under the required supervised conditions.
- Ensure each learner completes and submits their own examination. Do not coach, prompt or disclose answers.
- Confirm submission and record any interruption, suspected irregularity or technical failure.

B4. Skills assessment

- Use the approved digital skills assessment form while directly observing the learner.
- Assess each required skill against the current PHECC standard and CPG. Do not infer competence where the required performance was not observed.
- Enter the instructor email address and complete the learner, course and assessor details accurately.
- Where the assessment spans sessions, submit the partially completed form and return using the secure link sent by email. Continue the same learner record.

- Complete all required skills, remediation or repeat actions in accordance with the course standard and CPL Institute direction.

B5. Assessment decisions and learner communication

- Check the automatically calculated result and pass or unsuccessful status for obvious data-entry errors.
- Do not override the calculated outcome or create a duplicate submission. Contact the PHECC administrator where correction is required.
- Explain that completion of the course does not guarantee certification and that records remain subject to CPL Institute quality checks and PHECC requirements.
- Do not issue certification or promise a certification date.

B6. Incidents, remediation and unsuccessful outcomes

- Record the factual reason for an unsuccessful skill or examination outcome using the approved fields.
- Do not change the standard to achieve a pass. Any remediation or reassessment must follow the current PHECC course standard and CPL Institute instruction.
- Report safety incidents, learner illness, equipment failure, suspected malpractice or data issues immediately.

B7. PHECC course close-out checklist

- Course and learner eligibility confirmed.
- Required ratios and equipment standards maintained.
- Day-one attendance submitted.
- All theory examinations submitted through the approved link.
- All skills assessment records completed and finalised.
- Any continuation links closed out for multi-session assessments.
- Unsuccessful outcomes and incidents reported to the PHECC administrator.
- Learner and instructor feedback completed.
- Any remaining controlled records returned.