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Empowering
Regulatory
Transformation

Education Provider Portal and the Quality Workbench Module Exercises Guide



This guide is intended to lead you through the exercises for the training session. Some of these exercises will take place during the training, while others are designed for you to work on your own after the training.

Training Environment Links

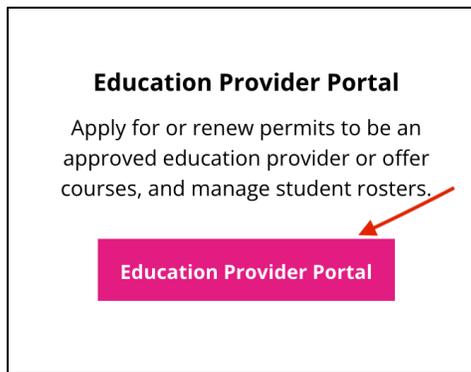
[Training Environment – Education Provider Portal](#)

[Training Environment – Workbench](#)

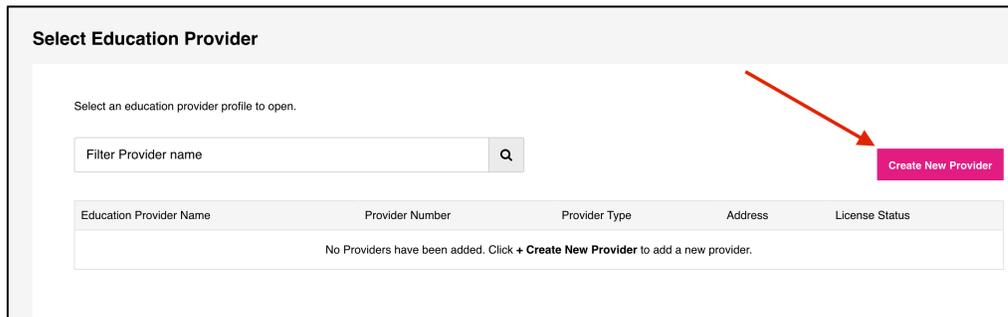
Exercise #1

Submitting an Education Provider application

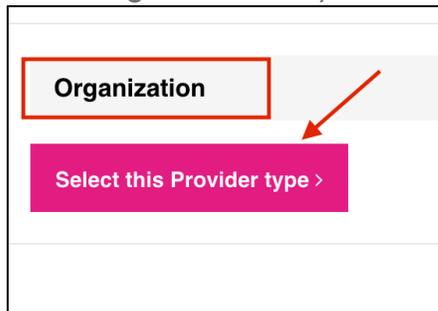
1. Access the Education Provider Portal



2. Click to **Create a New Provider**



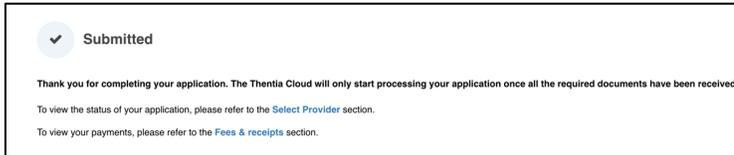
3. Select **Organization** as your **Provider Type**





4. Complete and **Submit a Provider Application**

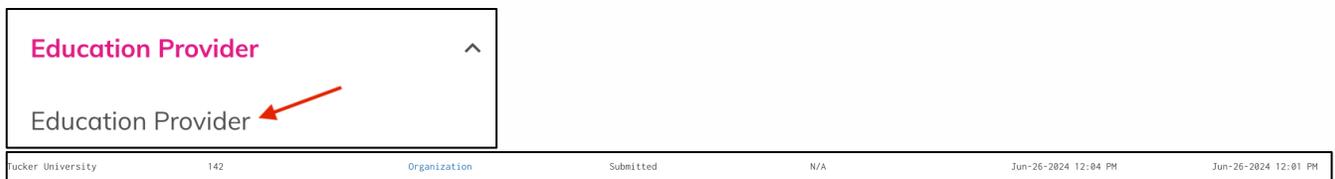
- This is so you'll have an application to review and work with, in the Workbench.



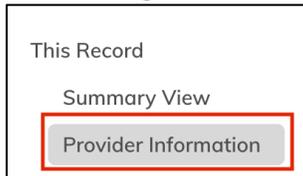
Exercise #2

Processing and approving an Education Provider application

1. Within the **Quality Module**  of the Workbench
2. Open the Hamburger menu
3. Select "Education Provider" from the left-hand navigation to get to the application you've submitted

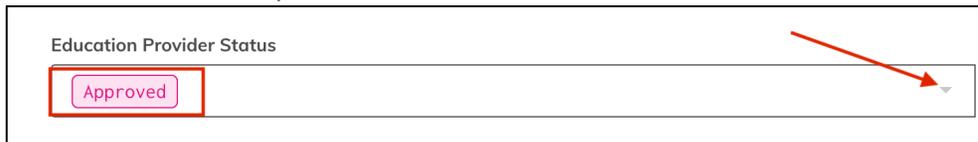


4. Review application: (double click on the Application, select "Provider Information" on the left-hand navigation menu)



What questions do you have? (Be ready to share at least one question)

5. Update the Submittal Status to **Approved** from the drop-down menu (make sure to select "Save" for a manual process)





Exercise #3

Submitting an Education Provider Program application

1. Access the Education Provider Portal
2. Click to view the **Applications Page**

Tuckers College for Cats
123 Anywhere, TO, Ontario, A1A 1A1 >

Approved Programs

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Start New Application

3. Submit an **Education Program** application

Type: Education Program-Managed

Education Program - Managed

A managed program allows the education provider to add and remove students, upload student hours, create extracurricular events and upload extracurricular hours. A student must first be added and approved to the program the education provider can upload hours for the student.

Select this Application >

4. Complete and **Submit a Program Application**

- This is so you'll have a Program application to review and work with, in the Workbench.

Submitted

Thank you for completing your application. The Thentia Cloud will only start processing your application once all the required documents have been received.

To view the status of your application, please refer to the [Program Application](#) section.

Exercise #4

Processing and approving an Education Provider Program application

1. Within the **Quality Module** of the Workbench
2. Access the Education **Program** application you've submitted

Education Provider

- Education Provider
- Education Provider User
- Education Provider Submitted Document
- Education Provider Extracurricular Event
- Education Provider Program
- Education Provider Program Submission
- Education Provider Program Application**

All Provider Program Applications Tucker's

Application Number	Provider Program Type	Application Status	Submitted Date	Decision Date
144	Education Program - Managed	Submitted	Jun-26-2024	N/A

3. Review application:
What questions do you have? (Be ready to share at least one question)
4. Update the Submittal Status to **Approved**

Download

This Record

- Summary View
- Provider Program Application**
- Invoice
- CE Program
- Exam Program
- Files & Activities
- Audit History

Provider Program Application

Application Number:

Application Status:

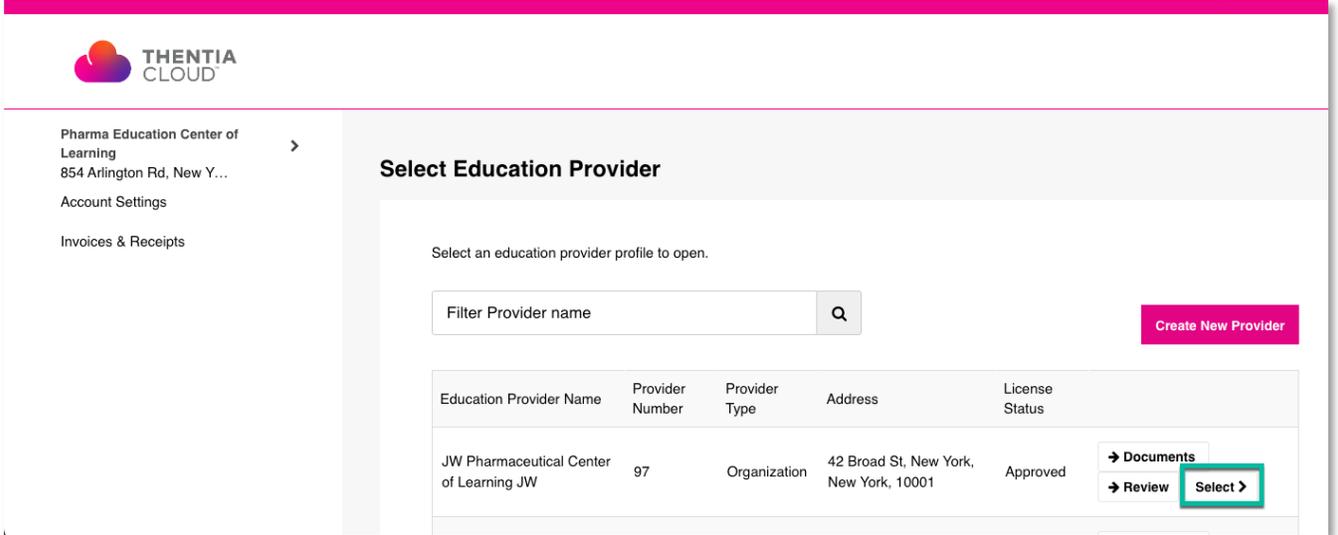
Education Provider:

Application Step:

EXERCISE TO DO ON YOUR OWN TIME

Add a Provider User Account (another admin for an education provider) (1 of 2)

- Log on to the **Education Provider Portal**
- If you have more than one **Education Provider**, you'll need to **select your Education Provider**



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Pharma Education Center of Learning
854 Arlington Rd, New Y...
Account Settings
Invoices & Receipts

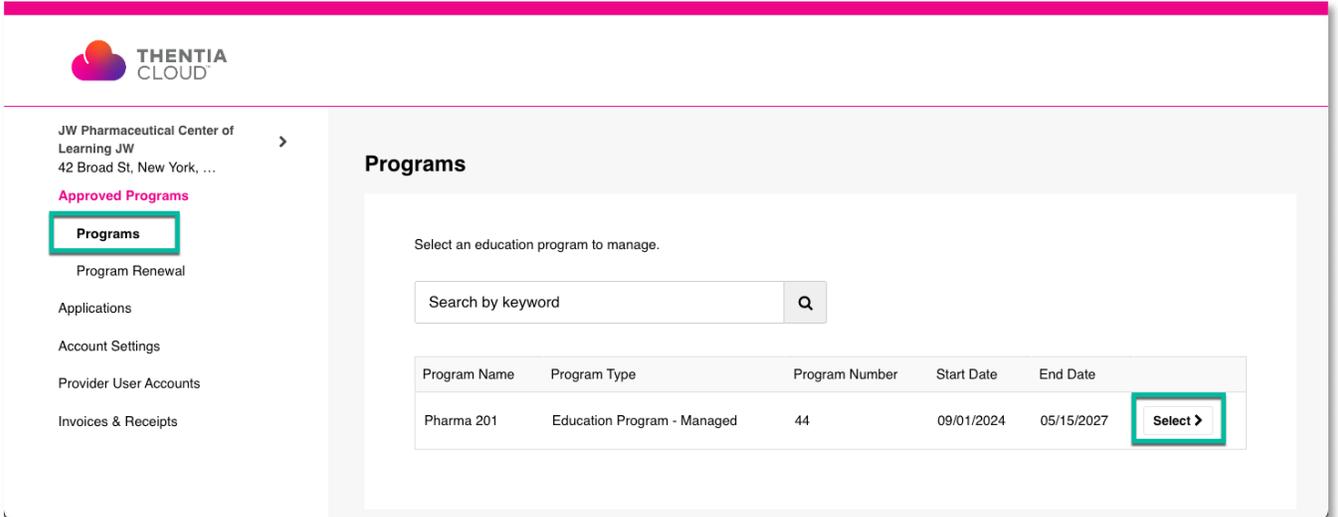
Select Education Provider

Select an education provider profile to open.

Filter Provider name

Education Provider Name	Provider Number	Provider Type	Address	License Status	
JW Pharmaceutical Center of Learning JW	97	Organization	42 Broad St, New York, New York, 10001	Approved	<input type="button" value="→ Documents"/> <input type="button" value="→ Review"/> <input type="button" value="Select >"/>

- **Select your Education Provider Program**
(Your program application will need to be approved)



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JW Pharmaceutical Center of Learning JW
42 Broad St, New York, ...
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Programs

Select an education program to manage.

Search by keyword

Program Name	Program Type	Program Number	Start Date	End Date	
Pharma 201	Education Program - Managed	44	09/01/2024	05/15/2027	<input type="button" value="Select >"/>

- **Access the Provider User Accounts** area to add an alternate user account to enable an additional person the ability to serve as an admin on behalf of the education provider to work with programs, students, exams, etc.



JW Pharmaceutical Center of Learning JW
42 Broad St, New York, ...

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Provider User Accounts

Manage Provider Accounts

- **What can an added user do?**
Anything that the business owners or managers are able to do. All transactions will be available with the exception of providing delegated access to additional users. Delegated access should be on a limited basis to users that are trusted to conduct transactions on behalf of the business.
- **What can a user administrator do?**
An administrator is the same as a standard user but can grant additional users access to the business and grant administrative rights to other users.

Note: Business ownership remains responsible for all transactions completed by delegates.

Provider Name	Provider User	Is Administrator?	Approved
No Authorized Provider User Accounts have been added.			

+ Add New Records

Submit a Student to your approved Education Provider Program (2 of 2)

- Log on to the [Education Provider Portal](#)
- **Select your Education Provider**
- **Select your Education Provider Program**
(Your program application will need to be approved)
- **Scroll to access the Add a Student button**



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Programs

Pharma 201

Program Number	44
Program Type	Education Program - Managed
Start Date	09/01/2024
End Date	05/15/2027
License Type	N/A

Students

Students currently enrolled in the program. To upload hours, click on 'Upload Hours'. To add a student to the program, click 'Add a Student'. To release a student or view more information about a student, click 'Manage'.

Search by keyword

From the Workbench

- **View the Student Enrollments for your program. Access your Education Provider Program in the workbench, then access the Student Enrollments area to view and approve the newly submitted student.**

Pharmaceutical JW Knowledge 101

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Summary View

Provider Program Details

CE Program

Exam Program

Files & Activities

Audit History

Files

Activities

Connections

Education Provider Program

License Types

Renewal

Student Enrollments

Submission Periods

Submissions

Narrow results by keyword search

Provider Program	Student	Submitted Date	Enrollment Status
Pharmaceutical JW Knowledge 101	Price Hayden	Apr-10-2024	Submitted

1 - 1 of 1 items

Education Providers | Pharma Education Center of Learning | JW University of Pharmaceutical Knowl... | **Pharmaceutical JW Knowledge 101**

Student Enrollment - Pharmaceutical JW Knowledge 101

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This Record

Student Enrollment

Student Enrollment Release Details

Files & Activities

Audit History

Files

Activities

Connections

Attestations

Declarations

Fee Waivers

Practice Hours

Student Extra Activity

Submitted Documents

Student Enrollment

Provider Program: Pharmaceutical JW Knowledge 101

Student: Price Hayden

Enrollment Step: 5

Invoice:

Enrollment Status

Submitted

Approved

Cancelled

New

Released

Pharma Education Center of Learning | JW University of Pharmaceutical Knowl... | Pharmaceutical JW Knowledge 101 | **Student Enrollment - Pharmaceutical J...**