Prepared by:	DIME Team HSE NDTP
Approved by:	DIME Team HSE NDTP
Version number:	V4
Date:	October 2024

Clinical Course & Exam Refund Scheme (CCERS)

Medical ManpowerUsers

NDTP – DIME

NATIONAL DOCTORS TRAINING & PLANNING

NDTP Support Contact Details

dime.team@hse.ie

National Doctors Training & Planning Block 9E,
Sancton Wood Building Heuston South Quarter
Saint John's Road West Dublin 8

www.hse.ie/doctors

NATIONAL DOCTORS TRAINING & PLANNING

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1. Introduction:

The Clinical Course and Exam Refund Scheme (CCERS) is part of the suite of educational supports for NCHDs provided by HSE-NDTP. The scheme provides funding towards an approved list of clinical courses and exams. All doctors employed under the 2010 NCHD contract are eligible to apply for refunds under the CCERS. For further information on the CCER Scheme, or the other supports offered by NDTP, please see link to the CCERS policy: https://www.hse.ie/eng/staff/leadership- education-development/met/ed/fin/

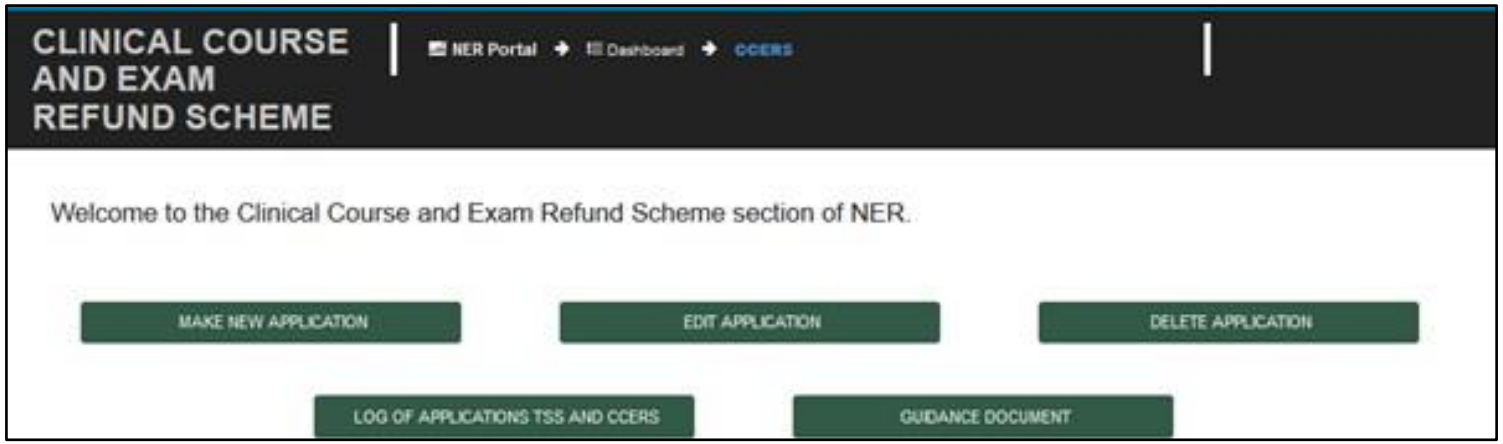
2. CCERS on NER:

In order for the NCHD to create a CCERS Application, they must submit an application via the ClinicalCourse & Exam Refund Section on their NER Account.

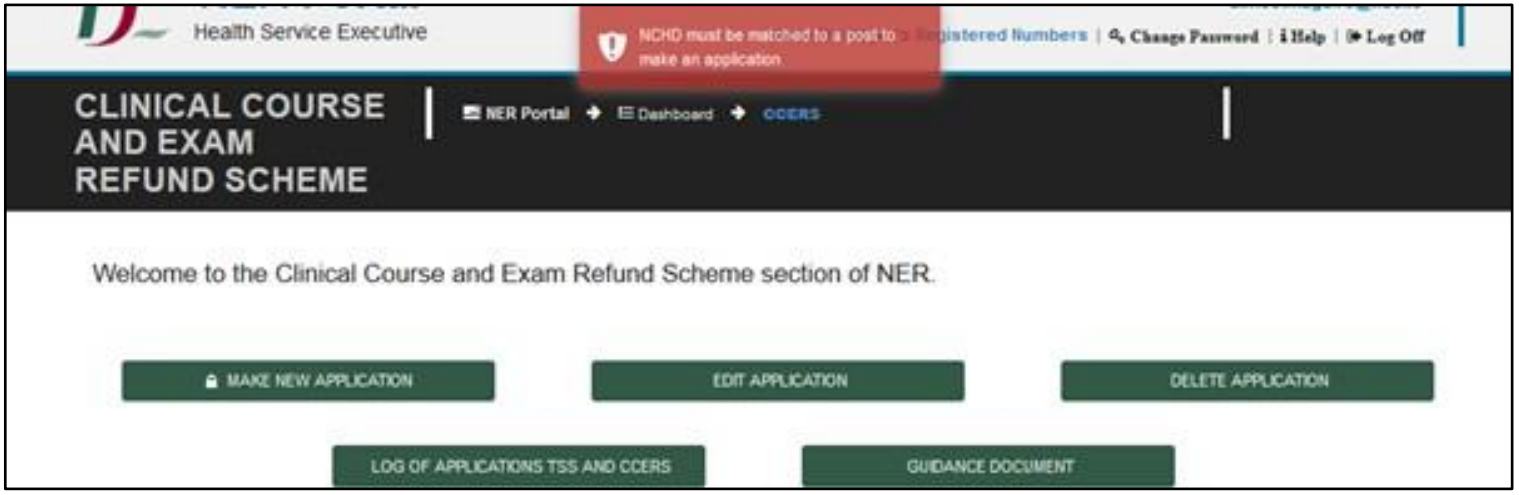
Once they have selected the CCERS icon on their NER Dashboard they will be directed to the CCERS home page

The home page has five sections within, as described below:

- Section 1: Make New Application
- Section 2: Edit Application (only New, Further Info and Unprocessed applications can be edited)
- Section 3: Delete Application (only if it has not been submitted to Medical Manpower i.e.status New)
- Section 4: Log of Applications TSS and CCERS
- Section 5: Guidance Document



If the NCHD is not post matched they will not be able to make an application. They will see a padlocksymbol on the “Make New Application” section and a toaster message should display saying:



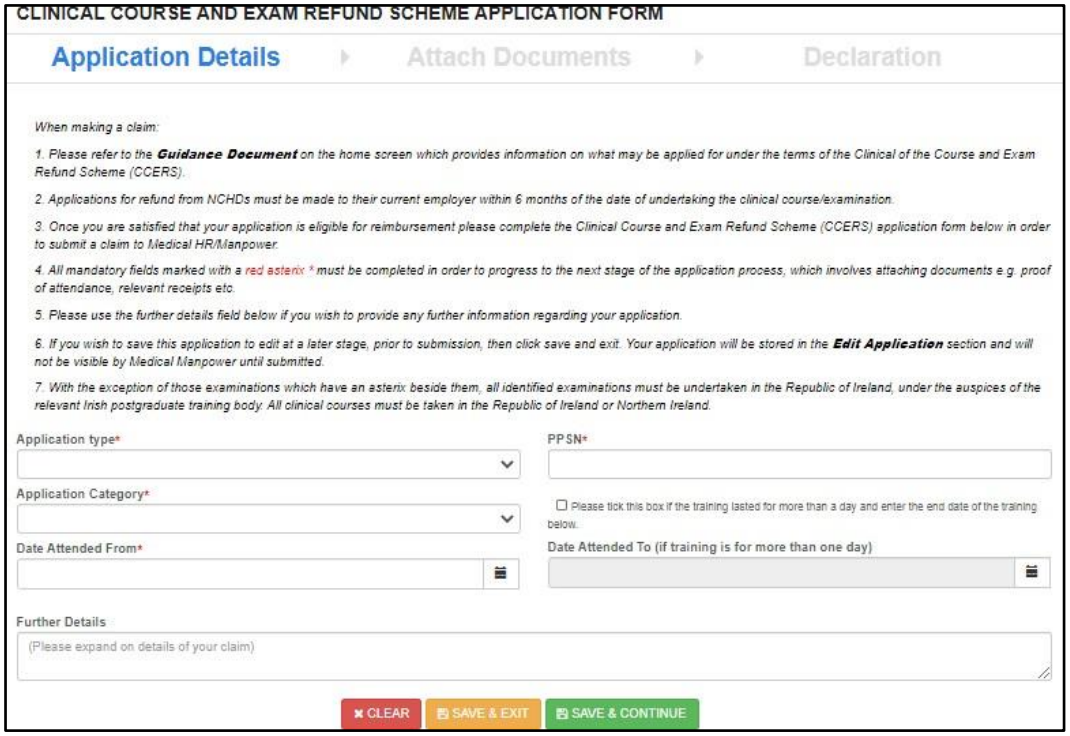
2.1 Make New Application:

The NCHD will be required to complete three sections in the CCERS application form:

- **Section 1: Application Details**
- **Section 2: Attach Documents**
- **Section 3: Declaration**

2.1.1 Section 1: Application Details

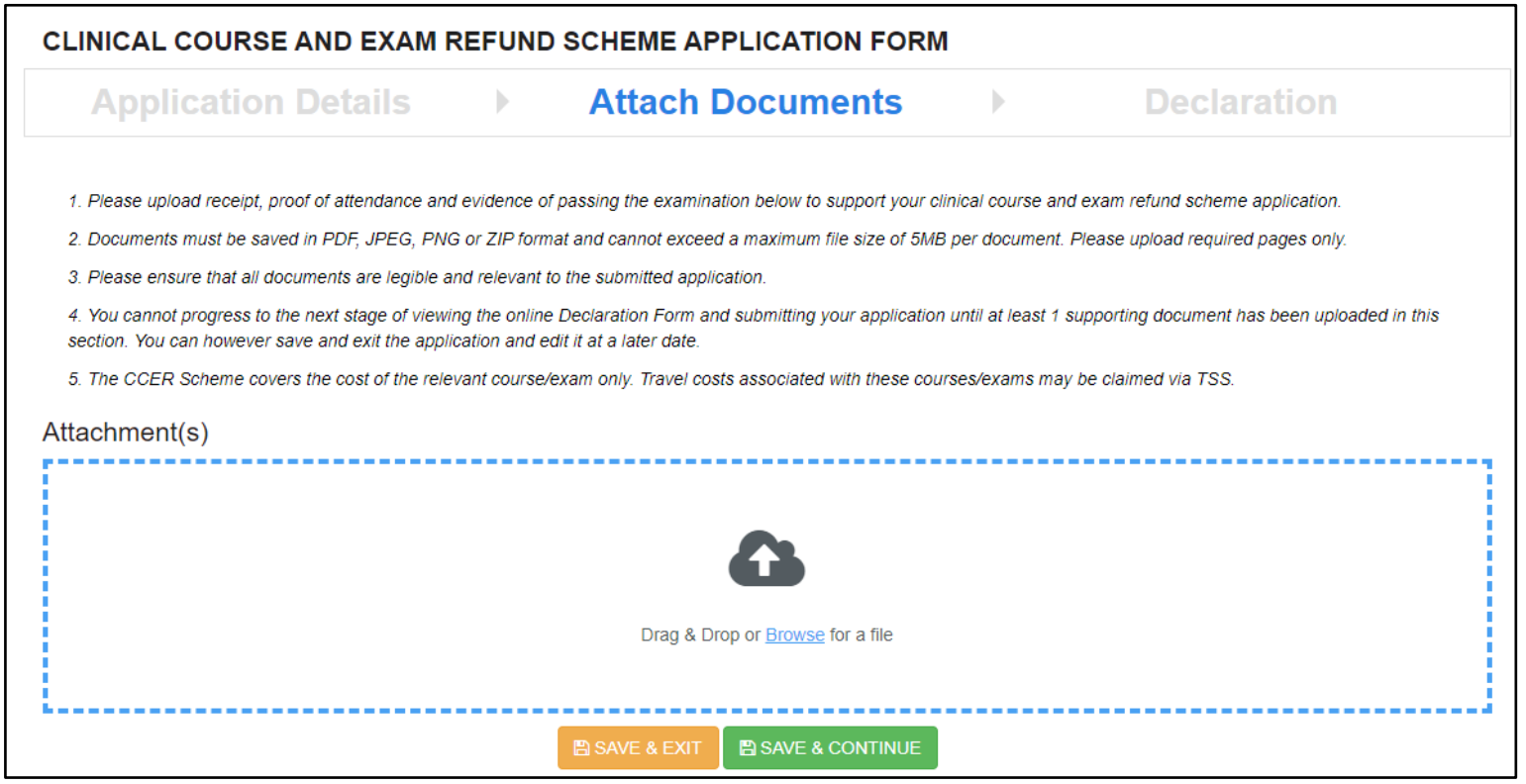
The NCHD will click on the “Make New Application” button. This will open up the CCERS applicationform page below:



A CCERS application can only be submitted to the Medical Manpower Department for verification aftercompletion of All Mandatory requirements of each Section. Mandatory fields will be denoted by a Red Asterisk *

NB: The NCHD should click “Save & Continue” to progress to the next stage of the application. Clicking “Save & Exit” will save the application for editing later (“Edit Application” Section) but the application will **not** be visible to the Medical Manpower Department until the online declaration is signed by the NCHD and the application is submitted.

2.1.2 Section 2: Attach Documents



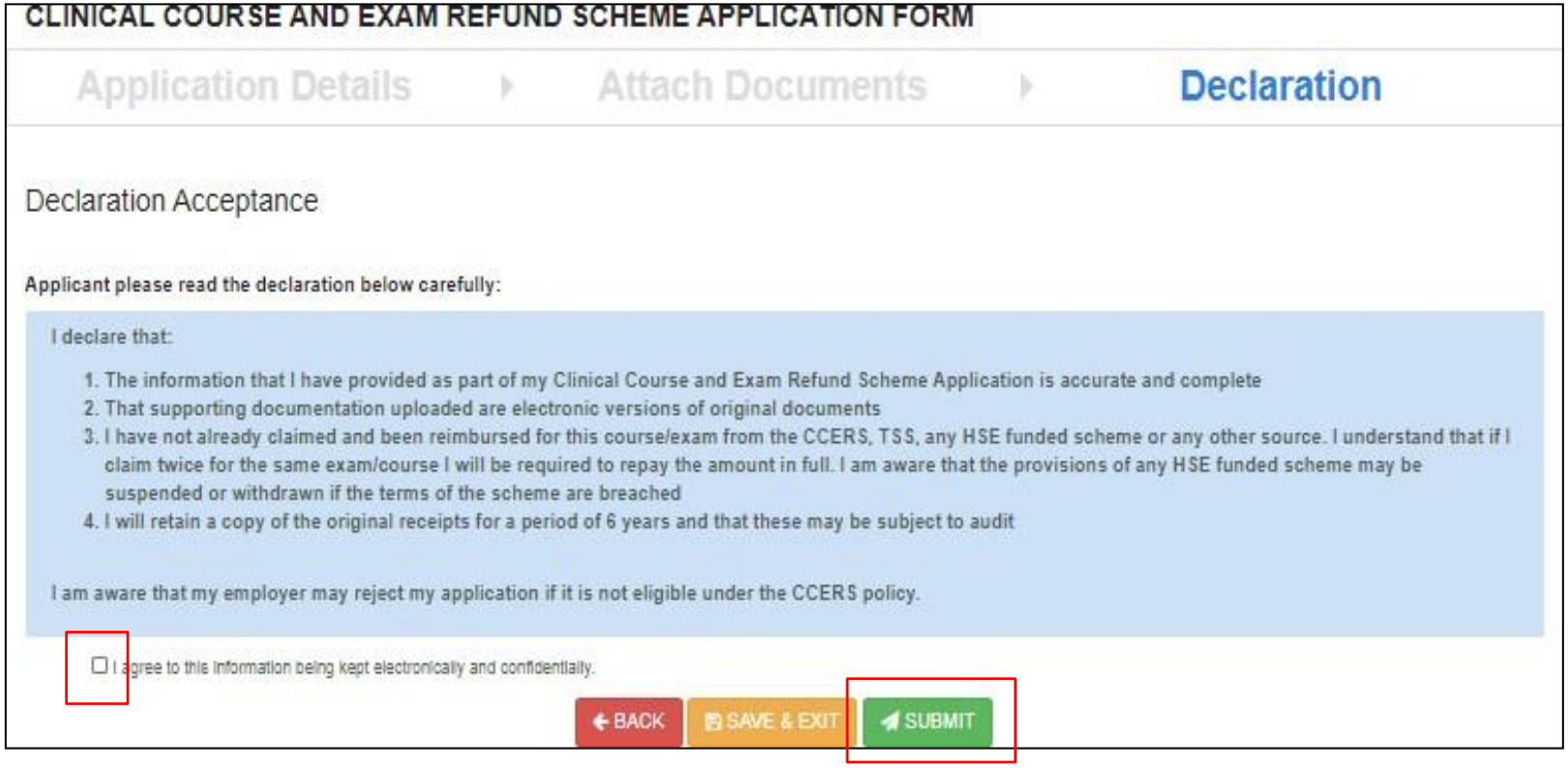
To attach a document the NCHD can click on the **"Browse"** button, which will allow them to browse for a specific document on their PC and add it to the application. Otherwise they can use the drop box to "drag & drop" the document they want to attach with their application. They can upload multiple documents in this section. Please note the following regarding file uploads:

Validation & Mandatory Requirements for Document Uploads on NER:

- It is mandatory to upload at least one document.
- The document should not exceed 5mb file size.
- Only documents in PDF, JPEG or PNG format can be uploaded
- The file compressed into a ZIP file can also be uploaded in the attach documentssection as a supporting document.

2.1.3 Section 3: Declaration

In order to submit an application to the Medical Manpower Department, the NCHD needs to ensure that they sign the online declaration form. To do this they need to check the tick box shown in the below image and finally click the “Submit” button. If the NCHD clicks “Save and Exit” the application will not be visible to the Medical Manpower Department. However, they can edit this application in the “Edit Applications” section.



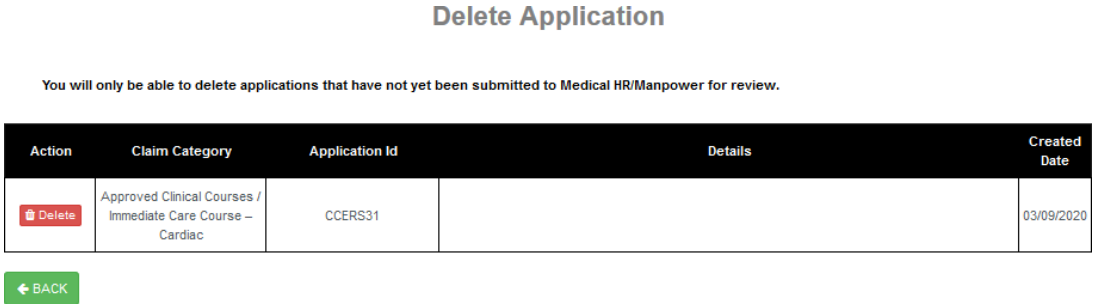
2.2 Edit Application:

NCHDs can edit applications with the following status only: New, Further Information Required andUnprocessed

NB: In order for the NCHD to submit an Application that was in “Edit Application” section, they must complete proceed through each of the 3 sections in the Application form and sign the declaration before submitting to the Medical Manpower Department.

2.3 Delete Application:

NCHDs will only be able to delete applications they have not yet submitted to the Medical ManpowerDepartment i.e. “New” Applications.



2.4 Log of TSS and CCERS Applications:

NCHDs will be able to view all applications that they have submitted to date under both the TSS andCCERS schemes in this section.

LOG OF APPLICATIONS TSS AND CCERS

You will be able to view a list of all your Training Support Scheme (TSS) & Clinical Course and Exam Refund Scheme (CCERS) applications in the table below.

You will also have the functionality to download each application and supporting documention by clicking on the Download option.

Status Explanations:

New: You have initiated a new application however you have not yet submitted this to Medical HR/Manpower.

Submitted: application has been submitted to Medical HR/Manpower and is awaiting processing or further information has been provided by the NCHD and it is awaiting processing from Medical HR/Manpower.

Further Info Required: Medical HR/Manpower have returned your application as they require additional information in order to process your application. Please click on Edit Application to make any necessary amendments to your application.

Approved: application has been approved by Medical HR/Manpower.

Provisionally Approved: application has been reviewed and is awaiting final approval by Medical HR/Manpower.

Rejected: The application is rejected if not in line with allowable expenses under this policy. Once an application has been rejected, no further action can occur. If an application was rejected in error the NCHD will have to submit the application again.

Unprocessed: Medical HR/Manpower have not processed your application.

App. Id	Scheme	Claim Category	Details	Clinical Site	Submission Date	Status	Action Date	Amount Approved	Rejection Reason	Download Application
8697	TSS	European Courses / Conferences			05/11/2020	Submitted	05/11/2020			Download
83	CCERS	Ophthalmology Exams			05/11/2020	New	05/11/2020			Download
55	CCERS	Approved Clinical Courses			06/10/2020	Submitted	05/11/2020			Download

3. DIME: CCERS on DIME

3.1 Accessing the CCERS Module

The DIME system can be only accessed from a PC / Laptop.

Please note that Internet Explorer 11 (IE11) is the recommended browser for accessing the portal.

Once you have logged onto NDTP-DIME the CCERS Module will be displayed on the left hand side ofthe screen.

There are three options within the CCERS Module:

(i) **Applications** – this allows you to search for all CCERS Applications. The status isdefault to display any applications with status submitted as these applications will still require action. But the status filter can be changed as required.

(ii) **Log of Applications** – the Medical Manpower Department will be able to viewall previously approved applications (submitted online) from the current and previous training years. You will also be able to download all documents relating to a previously approved claim.

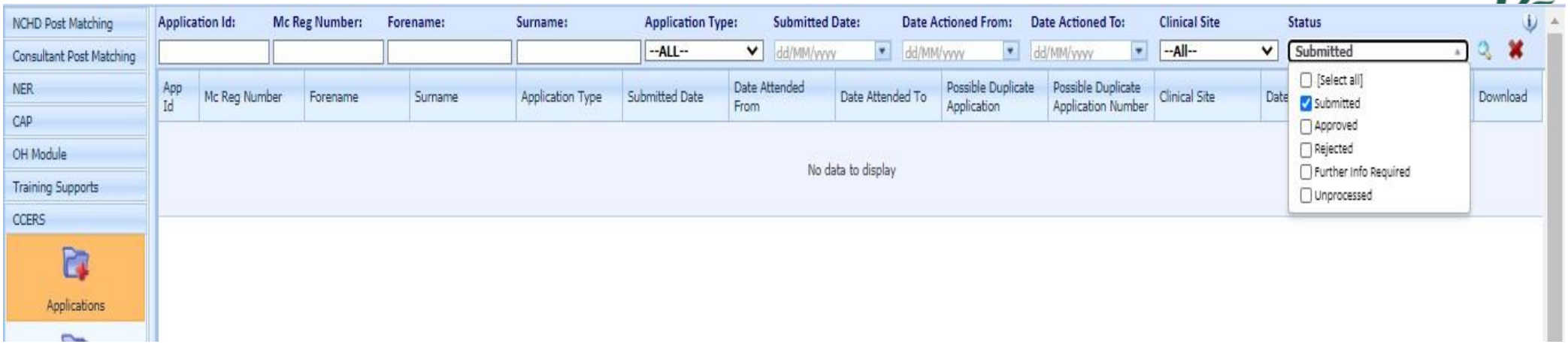
(iii) **Reports** – There are a number of useful reports available in this section that you can use. For more details, please see section 3.4.

3.2 Applications

3.2.1 Searching for Applications

Applications – This tab allows you to search for all the CCERS applications submitted by NCHDs currently matched to your clinical site. It also displays CCERS applications submitted by NCHDs for anadditional 28 days after they rotate from your clinical site to allow any pending applications to be processed. After this time if the application has not been Approved/Rejected the application will become Unprocessed.

When the Medical Manpower Department opens the Applications Screen in the CCERS Module, the Application Status will be defaulted to Submitted. Please note when a Medical Manpower Department actions an application (i.e. changes the status of an application); the NCHD will receive an automated email informing them of the status update



There is also a “Possible Duplicate Application” column available in this section. This should help when trying to establish if an NCHD has submitted a duplicate application.
The system will highlight if there is a **possible** duplicate application made by this NCHD under TSS. It does this by checking if a previous application, submitted by this NCHD, has a “Date Attended From” within 7 days before or 7 days after the current applications “Date Attended From”. If so, the system will flag this as a possible duplicate application by displaying a tick in the “Possible Duplicate Application” Column and a link to the application(s) that the system has identified as possible duplicates in the “Possible Duplicate Application Number” column.

For example, if you are reviewing CCERS Application ID 52 and in the “Possible Duplicate Application Number” column the TSS Application 8691 is visible then the application 8691 has a “Date AttendedFrom” within 7 days before or 7 days after the “Date Attended From” for Application ID 52.

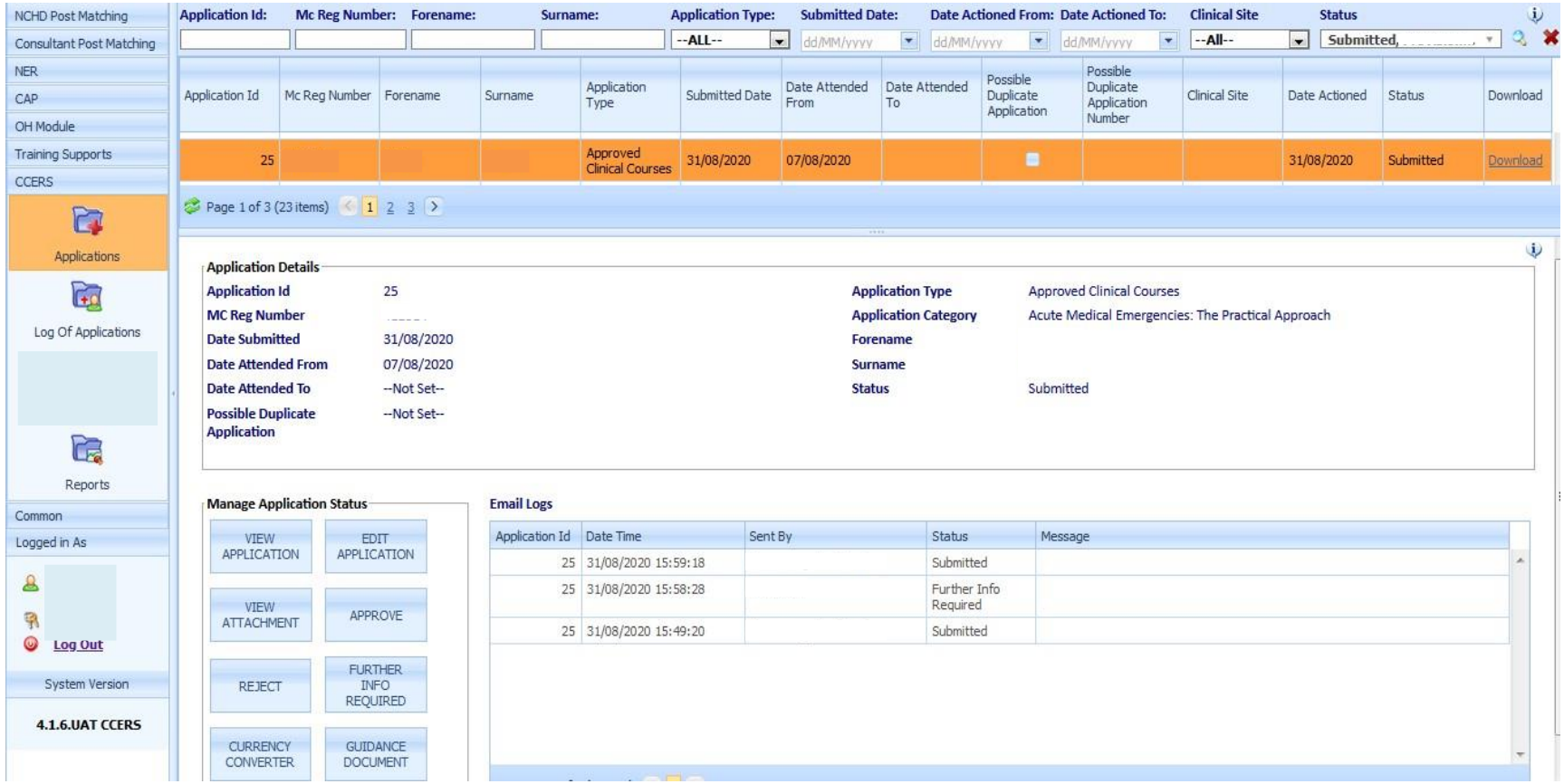
Application Id	Mc Reg Number	Forename	Surname	Application Type	Submitted Date	Date Attended From	Date Attended To	Possible Duplicate Application	Possible Duplicate Application Number	Clinical Site	Date Actioned	Status	Download
52				Obstetrics & Gynaecology Exams	01/10/2020	29/09/2020		✓	TSS-8691		01/10/2020	Submitted	Download
53				Obstetrics & Gynaecology Exams	05/10/2020	20/08/2020		✓	TSS-8683		05/10/2020	Submitted	Download

3.2.2 Reviewing and Managing Application Status

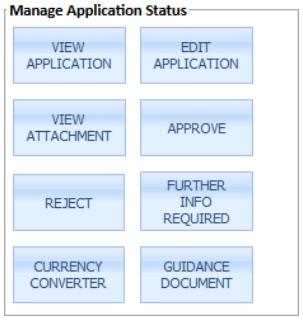
The Medical Manpower Department, you will be able to manage CCERS Application by selecting theoptions displayed in the Manage Application Status window below.

How to get here:

Navigate to the CCERS Module and choose the Applications buttonPerform a search for the CCERS application
Double click on the application highlighting it in orange



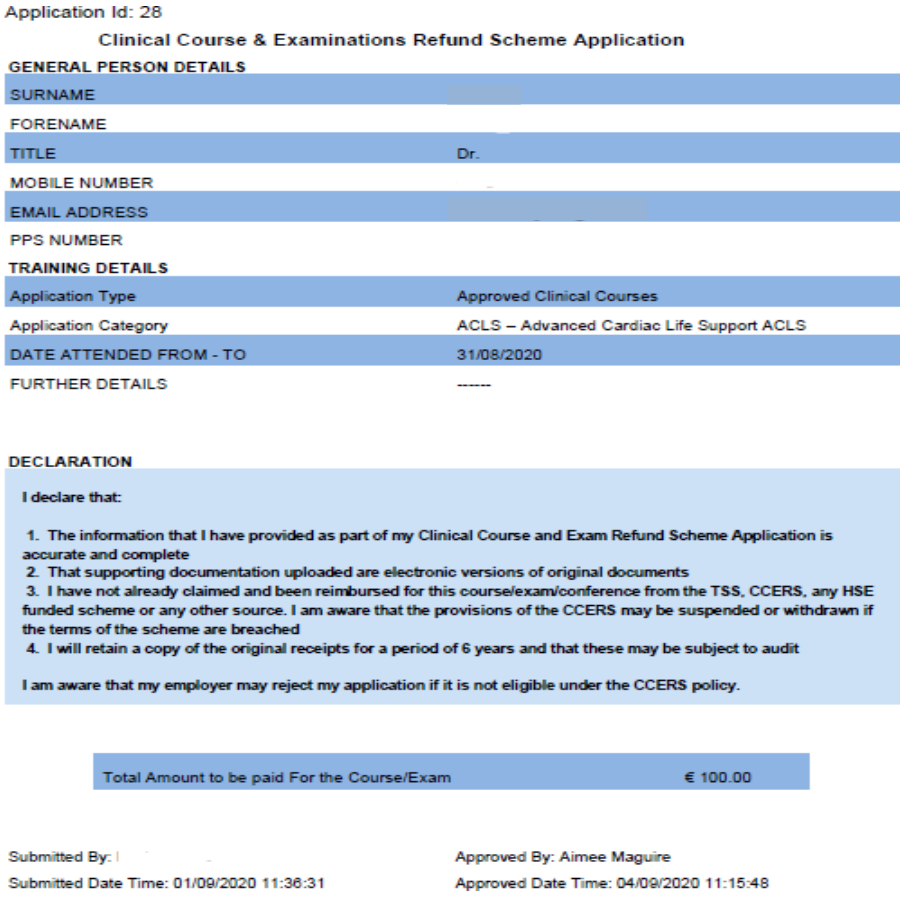
In the Manage Application Status section you will be able to do the following:



3.2.2.1 View Application

The Medical Manpower Department will be able to view the PDF version of the CCERS Application by clicking on the “View Application” button under the “Manage Application Status” window.

You will also have the option to Print and Save the application.



Application Id: 28

Clinical Course & Examinations Refund Scheme Application

GENERAL PERSON DETAILS	
SURNAME	
FORENAME	
TITLE	Dr.
MOBILE NUMBER	
EMAIL ADDRESS	
PPS NUMBER	
TRAINING DETAILS	
Application Type	Approved Clinical Courses
Application Category	ACLS – Advanced Cardiac Life Support ACLS
DATE ATTENDED FROM - TO	31/08/2020
FURTHER DETAILS	------

DECLARATION

I declare that:

1. **The information that I have provided as part of my Clinical Course and Exam Refund Scheme Application is accurate and complete**
2. **That supporting documentation uploaded are electronic versions of original documents**
3. **I have not already claimed and been reimbursed for this course/exam/conference from the TSS, CCERS, any HSE funded scheme or any other source. I am aware that the provisions of the CCERS may be suspended or withdrawn if the terms of the scheme are breached**
4. **I will retain a copy of the original receipts for a period of 6 years and that these may be subject to audit**

I am aware that my employer may reject my application if it is not eligible under the CCERS policy.

Total Amount to be paid For the Course/Exam	€ 100.00

Submitted By:

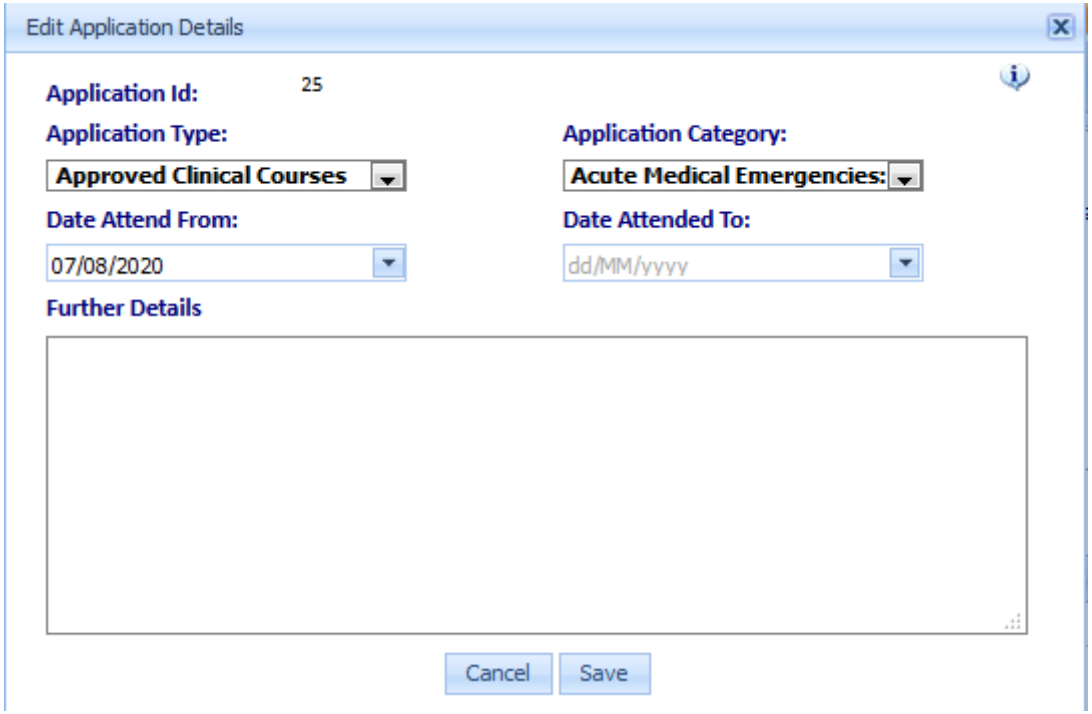
Submitted Date Time: 01/09/2020 11:36:31

Approved By: Aimee Maguire

Approved Date Time: 04/09/2020 11:15:48

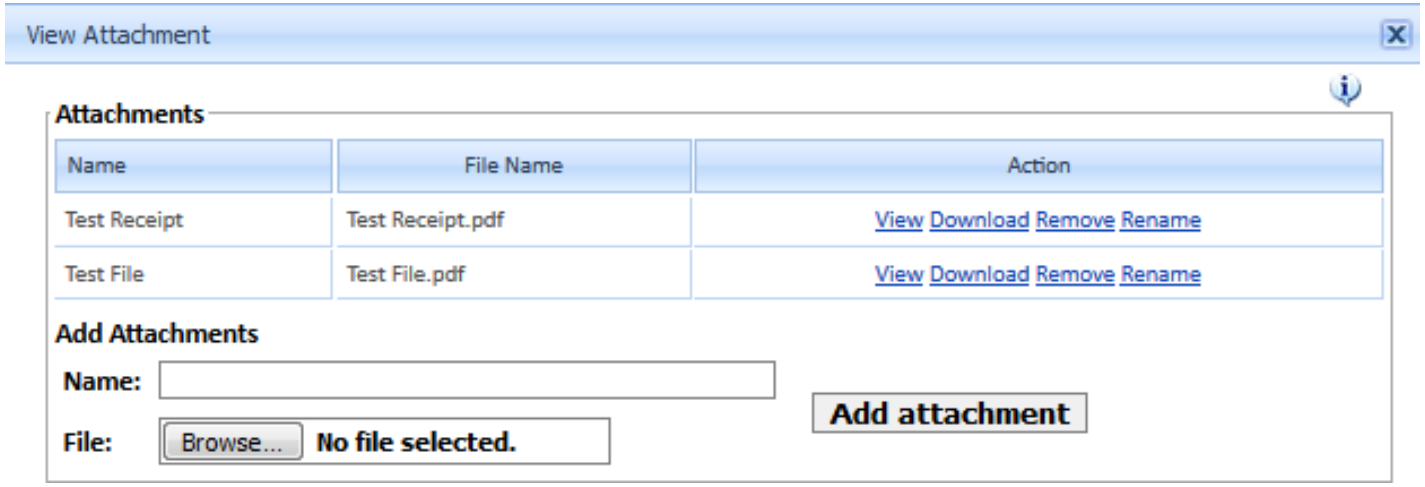
3.2.2.2 Edit Application

The Medical Manpower Department will have the ability to edit some details that were entered by the NCHD on their CCERS Application by clicking on the “Edit Application” button in the “Manage Application Status” window.



3.2.2.3 View Attachment

The Medical Manpower Department can view all supporting documentation submitted by the NCHD with their Application by clicking on the “View Attachments” button under the “Manage Application Status” window



As well as viewing the attachments in this pop-up box, the Medical Manpower Department will have the option to Upload / Download / Remove and Rename supporting documents on to the application.

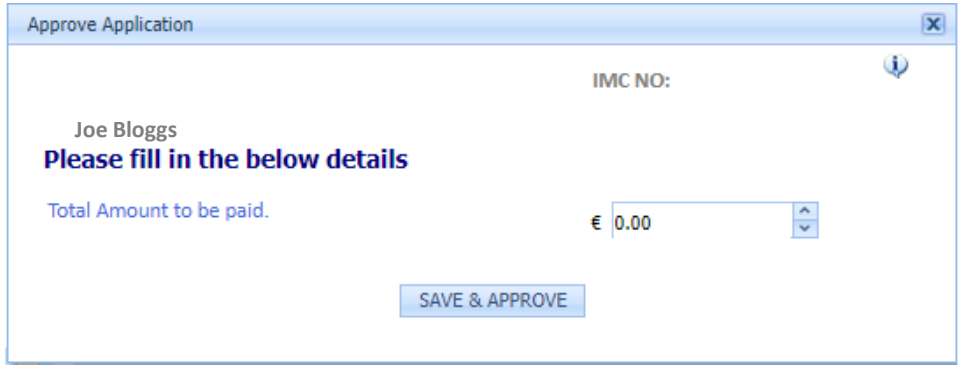
3.2.2.4 Approve Application

The Medical Manpower Department can approve applications (with status Submitted or Further Info Required), by clicking on the Approve button under the Manage Application Status window.

The Approve Application window will appear below containing the following information: Name of NCHD and IMC Number:

The Medical Manpower Department should enter the total cost of the Course/Exam into the active cell.

The Medical Manpower Department will have the option to Save & Approve or cancel the request by clicking the “X”.



Save and Approve

1. The CCERS Application status changes to Approved.

2. The status of the application will be updated in the NER Portal & DIME

3. Approval email will be sent to NCHD:

Dear Doctor

Your Clinical Course and Exam Refund Scheme (CCERS) application has been approved by Medical HR/Manpower::

Application ID	- 40
Application Category	- Anaesthesia
Clinical Site	- Holles St.
Submission Date	- 27/10/2020
Status	- Approved
Action Date	- 27/10/2020
Amount Approved	- €150

Please note this e-mail confirms that your claim has been approved by Medical HR/Manpower, however it will take between 4 - 6 weeks on average to reach your bank account.

Kind Regards

Medical HR/Manpower Department

4. The amount approved will appear at the bottom of the PDF. The name of the approver and the date when it was approved will also appear at the bottom of the PDF as shown below:

Total Amount to be paid For the Course/Exam	€ 100.00

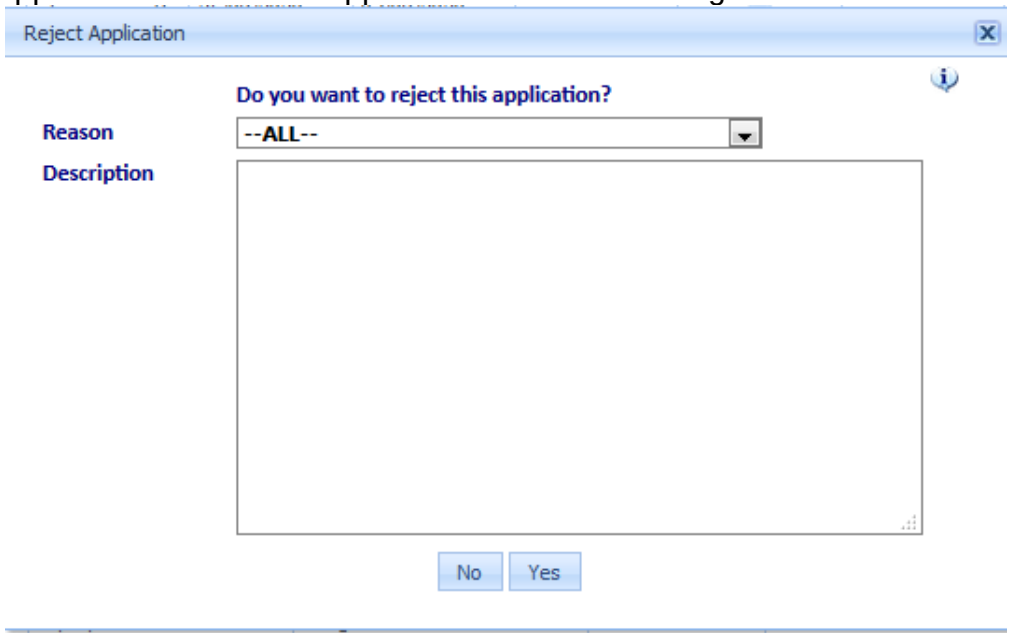
Submitted By: Joe Bloggs
Submitted Date Time: 01/09/2020 11:36:31

Approved By: Aimee Maguire
Approved Date Time: 04/09/2020 11:15:48

3.2.2.5 Reject Application

The Medical Manpower Department can reject an application (with status Submitted, Approved or Further Info Required), by clicking on the Reject button under the Manage Application Status window.

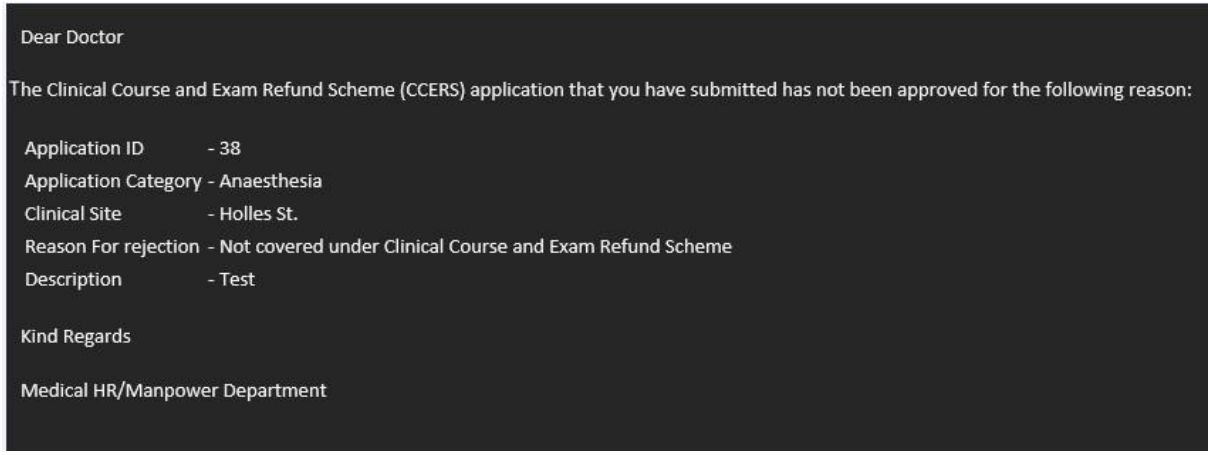
The Reject Application window will appear as in the below image:



When an application is rejected:

1. The status of the Application will be updated to Rejected.

2. A rejection email will also be sent to the NCHD



Dear Doctor

The Clinical Course and Exam Refund Scheme (CCERS) application that you have submitted has not been approved for the following reason:

Application ID	- 38
Application Category	- Anaesthesia
Clinical Site	- Holles St.
Reason For rejection	- Not covered under Clinical Course and Exam Refund Scheme
Description	- Test

Kind Regards

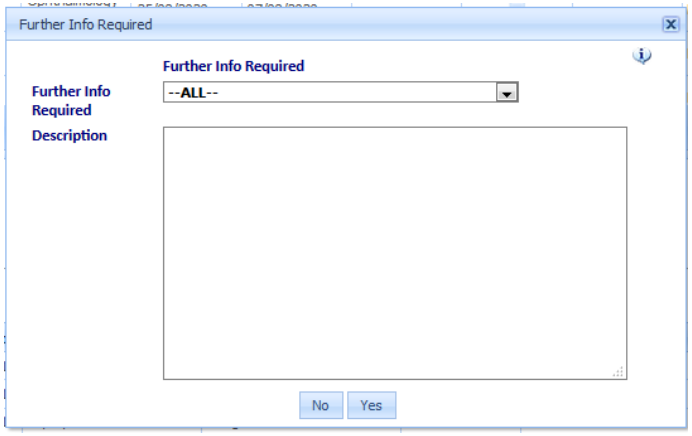
Medical HR/Manpower Department

3. The NER Portal will be updated.

3.2.2.6 Further Info Required

The Medical Manpower Department can seek Further Information for an application byclicking on the "Further Info Required" button under the "Manage Application Status" window.

The "Further Info Required Application" window will appear as in the below image:



When the Medical Manpower Department seeks Further Info Required,

4. The status of the Application will be updated to Further Info Required,
5. An email will be sent to the NCHD, informing them that further information is required,

Dear Doctor

Medical HR/Manpower require additional information in order to process your Clinical Course and Exam Refund Scheme (CCERS) application:

Application ID	- 39
Application Category	- Emergency Medicine
Clinical Site	- Holles St.
Further Info Reason	- test1
Description	- test

Please click on **Edit Application** in Clinical Course and Exam Refund Scheme section in your NER Portal Account to review your application.

Please make any necessary amendments to your application as soon as possible. All applications must be submitted in full prior to your contract end date.

Kind Regards

Medical HR/Manpower Department

6. They will be directed to make the necessary updates in their NER Portal (Edit Application section).

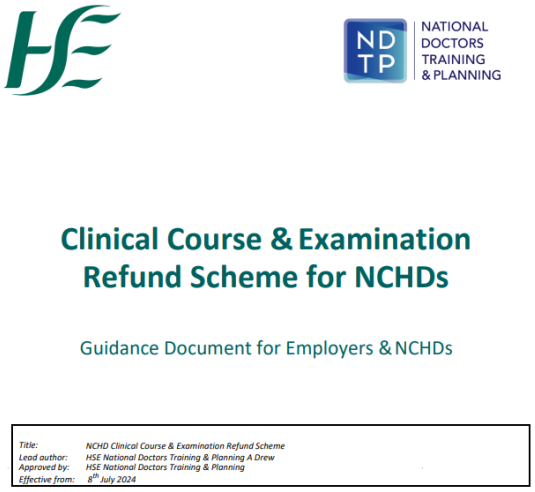
7. There will also be an Alert Symbol on the NER Portal, notifying theNCHD that action is required.

3.2.2.7 Currency Converter

The Medical Manpower Department may want to use the currency convertor when dealing with an application that has been submitted with receipts in a currency other than euro.

3.2.2.8 Guidance Document

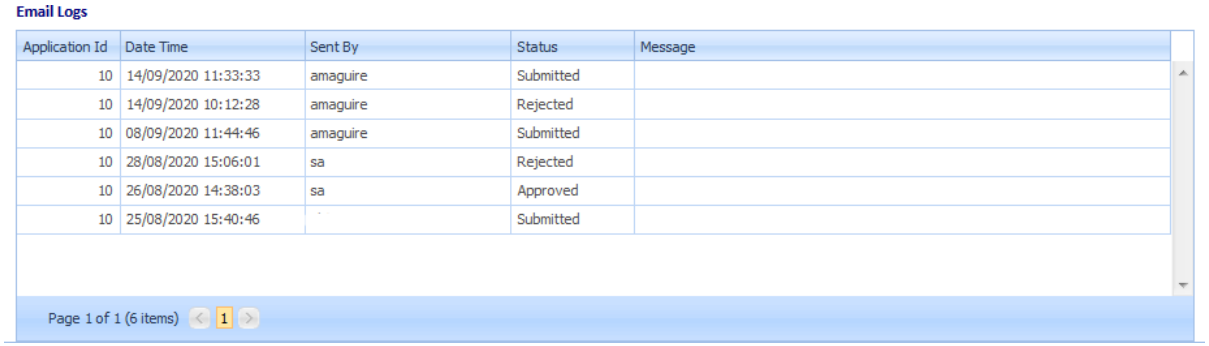
The CCERS Policy can be accessed by clicking the Guidance Document link under the Manage Application Status window



3.2.2.9 Email Logs

A Log of Emails sent by the Medical Manpower Department will be shown in the Email Logs table.This will be visible beside the Manage Application Status section in the lower half of the screen in Applications.

The Medical Manpower Department will also be able to see the progress of the application as the status and the date the application status was updated is also displayed here.



3.2.2.10 Downloading Attachments

There is an option to **download** all the supporting documents by clicking the **Download** button. This will download all the documents in a Zip Folder. The zip folder will have the name of the NCHD and today's date as the name (e.g. Jane Doe – 22092020). The download location shall vary accordingto the default download folder location set on a PC.

How to get here:

1. Navigate to the CCERS Module and choose the Applications section

2. Perform a search for the application and double click on the application highlighting it in orange

3. Select the "Download" button as shown in the below image to download the zip file

4. During the download application process, the below message will appear at thebottom of the screen

5. (Please click the **Save** option)

6. When the download has been completed, the below message will appear at thebottom of the screen and to view the application select **Open.**

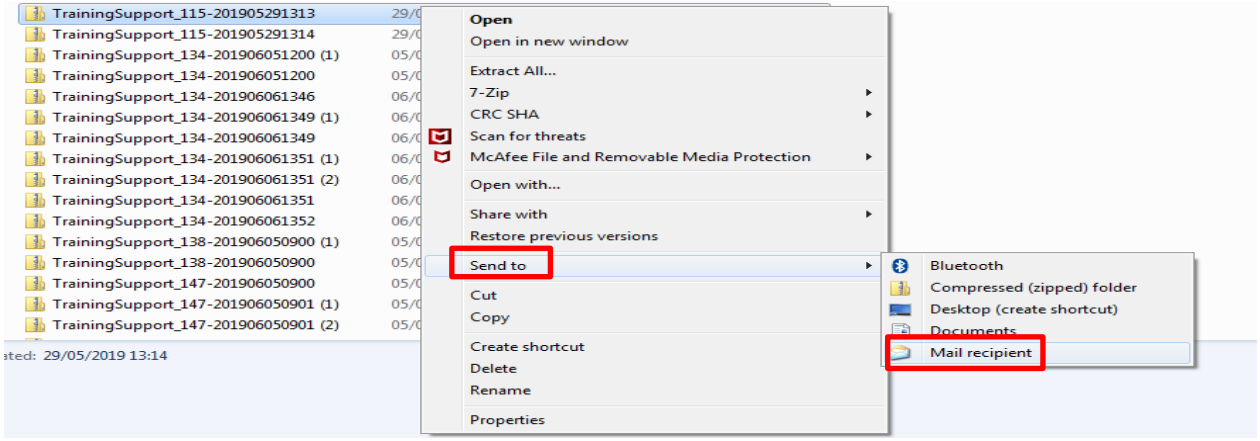
Emailing a Zip Folder

1. To email the zip folder, follow the above instructions and when the application downloadhas been completed, the below message

will appear at the bottom of the screen HSE NDTP - Clinical Course &

2. Please click the **Open Folder** option) this will then direct you to the ZipFolder in your download items.

3. To email the Zip Folder (Please **Right click** on the folder and select **Send To** - **MailRecipient** as per below image)



3.2.2.11 Amending the Status of an Application Actioned in Error

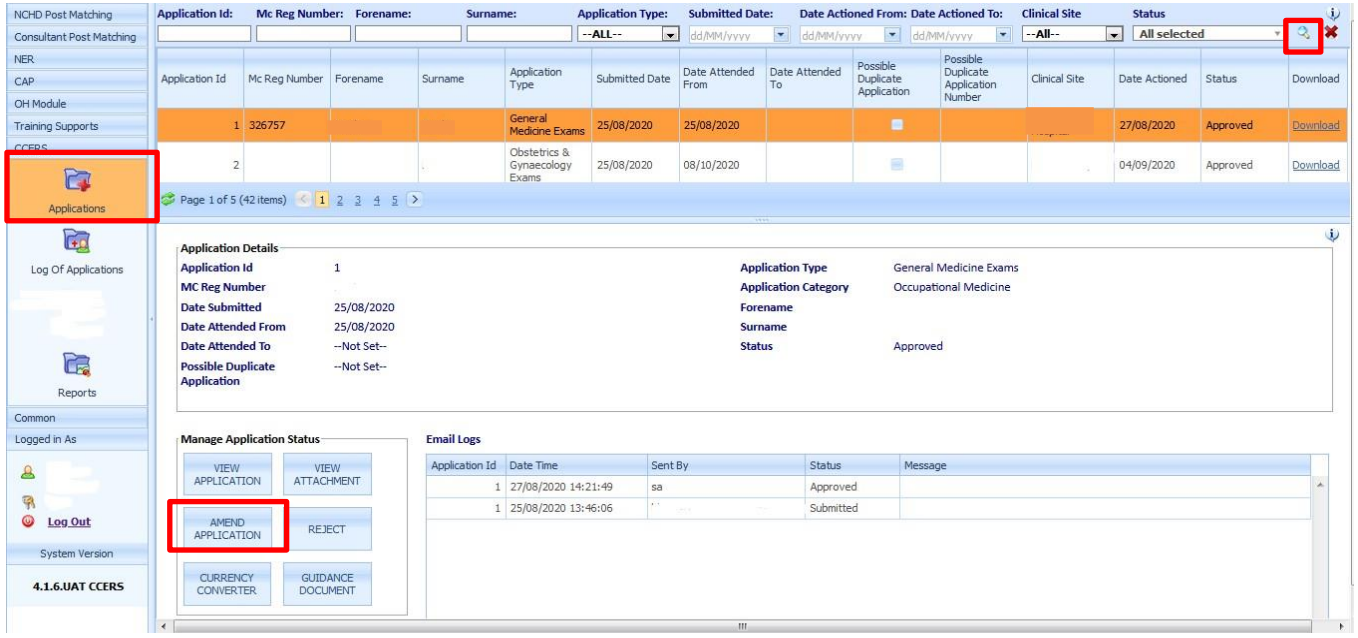
If you happen to action an application in error, leading to an application having the incorrect status you can amend the application as described below:

3.2.2.12 Amend an Approved Application

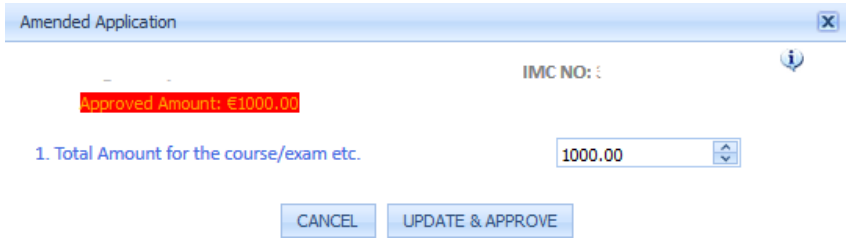
The Medical Manpower Department can amend a CCERS Application that has already been approved, if an error has been made. Applications with the following status can be amended: Approved or Rejected

How to get here:

- Navigate to the CCERS Module
- Choose the Applications icon
- Perform a search for the application you want to amend
- Double click on the application highlighting it in orange



- Select Amend Application in the Manage Application Status Section and thebelow pop up will appear



The Approved amount in the top left hand corner displays the amount that was originally approved. Edit the cell as appropriate and click “Update and Approve”when you are happy with the changes. The “Total Amount for the course/exam etc.” that you enter is the total amount you are now awarding the NCHD for this application.

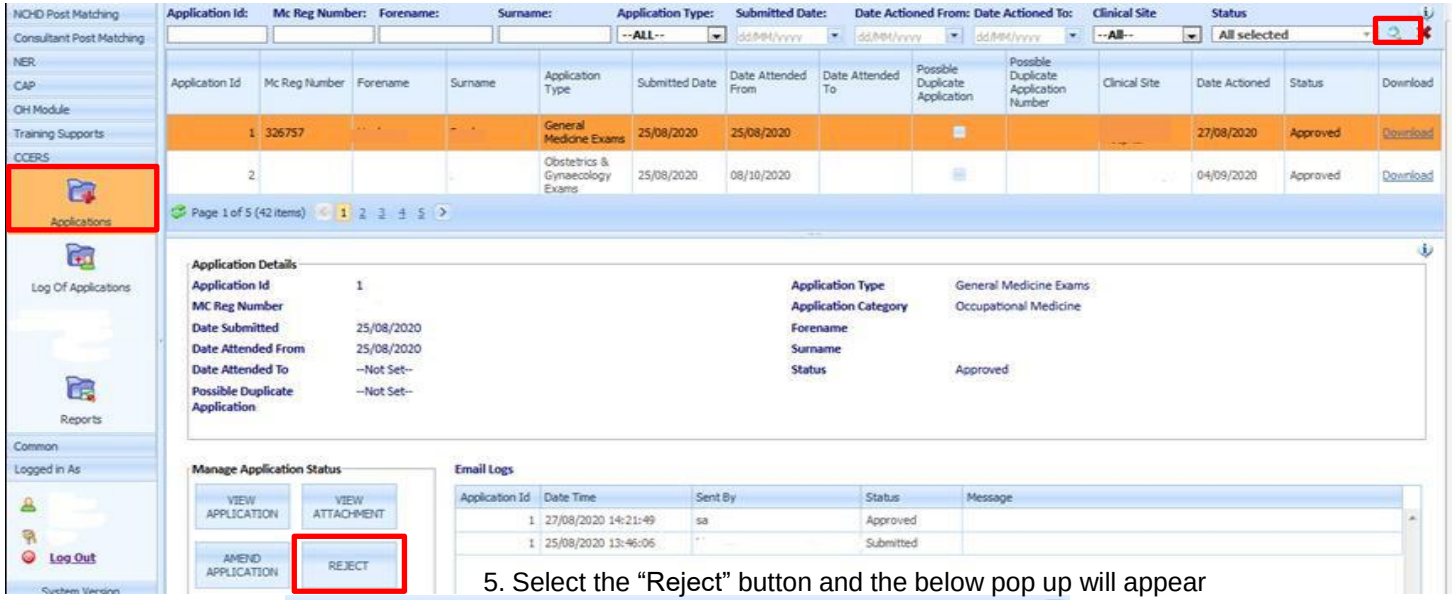
- Once the Application has been amended, the Medical Manpower Department should send an email outsidethe system to the NCHD advising of same, as no email will be automatically generated for this action
- Finance should be notified of this update, if the application hasalready been sent to them for processing.

3.2.2.13 Reject Approved Application

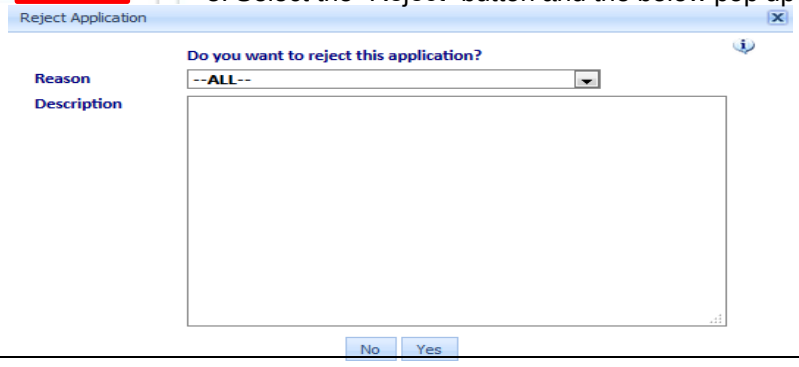
Similar to Amend Application, the Medical Manpower Department can Reject an application thathas already been approved, if previously approved in error. Please note the Medical Manpower Department will need to notify their Finance team, should the application have been originally sent to them for processing.

How to get here:

- Navigate to the CCERS Module
- Choose the Applications icon
- Perform a search for the approved application you now want to reject
- Double click on the application highlighting it in orange



5. Select the “Reject” button and the below pop up will appear



- Enter the reason as to why you want to reject the application and a description ifnecessary. Then click “Yes” if you are happy to reject the application

- Once the Application has been rejected the NCHD should receive an emailadvising them that their application has been rejected

- The Medical Manpower Department will need to notify their Finance Team ofthis change, should the application have been originally sent to them for processing

3.2.2.14 Change Status of an Application

If an application is rejected in error, the status of the application can be returned to status“Submitted” so the status can be amended accordingly.

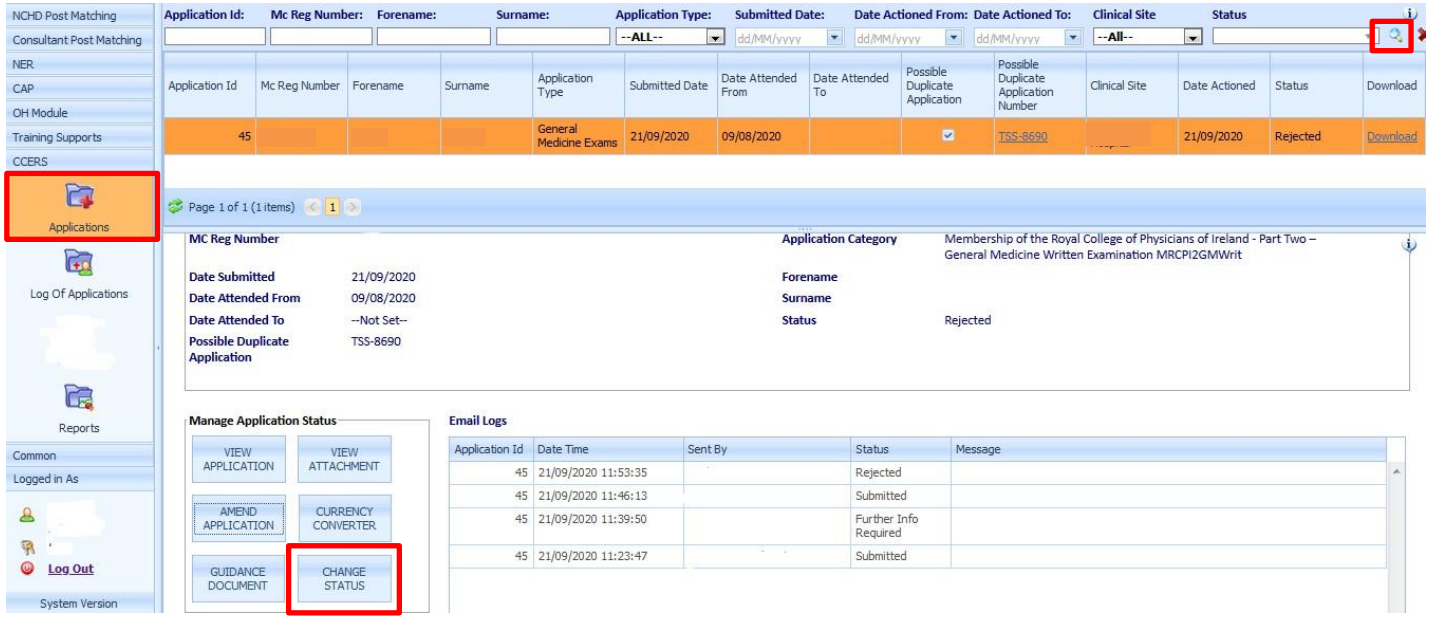
How to get here:

3.2.2.14.1 Navigate to the CCERS Module

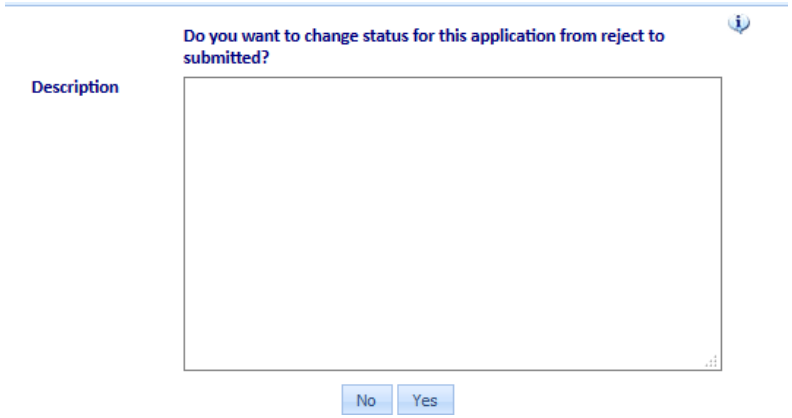
3.2.2.14.2 Choose the Applications button

3.2.2.14.3 Perform a search for the rejected application you now want to amend

3.2.2.14.4 Double click on the application highlighting it in orange



3.2.2.14.5 Click the Change Status button and the below pop up will appear. You can enter a description as to why you are amending the status and click “Yes” if you are happyto amend the status back to submitted



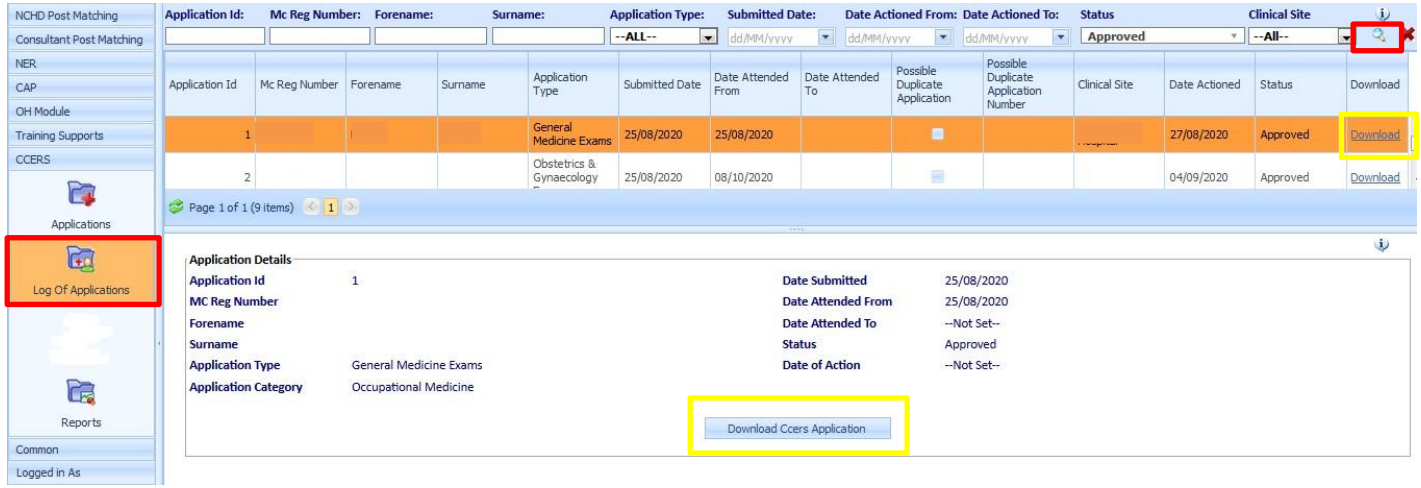
3.2.2.14.6 You should advise the NCHD, that their application was rejected in error and now has been returned to status submitted as they will not receive an automatic email generated by the system

3.3 Log of Applications

When the Log of Applications Screen is opened, the Application Status will be defaulted to Approved. The Medical Manpower Department can view and download all previously approved applications for their clinical site in this section. The Application Status can be adjusted to display all other application statuses.

How to get here:

1. Navigate to the CCERS Module
2. Choose the Log of Applications button
3. Perform a search for the application
4. Double click on the application highlighting it in orange
5. Downloading the Application to a Zip Folder may be done by selecting Download in either of the below highlighted download options



6. During the download application process, the below message will appear at the bottom of the screen

7. (Please click the **Save** option)

8. When the download has been completed, the below message will appear at thebottom of the screen and to view the application select **Open Folder**

Application Status:

New: Application has been created by NCHD but not yet submitted to Medical Manpower

Submitted: Awaiting Medical Manpower processing

Approved: Application has been approved by Medical Manpower.

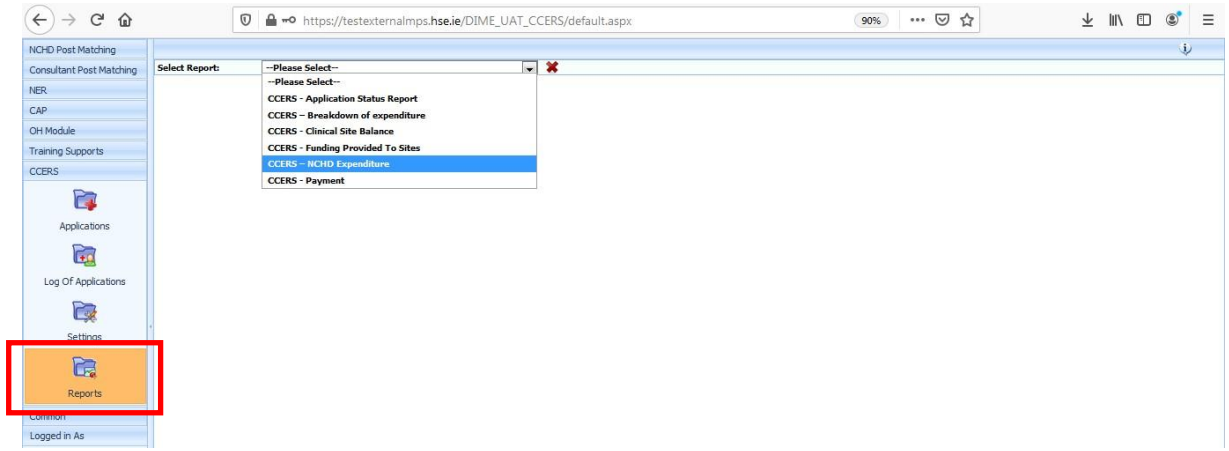
Rejected: The application is rejected if not in line with the current CCERS policy.

Further Info Required: The application has been returned to the NCHD for clarification / to getfurther information

Unprocessed: An application is considered unprocessed if Medical Manpower has not actioned anapplication within 4 weeks after the NCHD has left their post.

3.4 Reports

To access the CCERS reports click the “Reports” section in the CCERS Module:



The Reports available can be used to display a variety of information which may be useful for the Medical Manpower Department.

There is a filtering functionality available with all reports which allow the user to choose the information that is displayed in these reports as required. These filters vary, depending on the report chosen.

All reports can be exported and downloaded into an Excel file if necessary by selecting the blue floppydisk icon and click “Excel” as shown below:

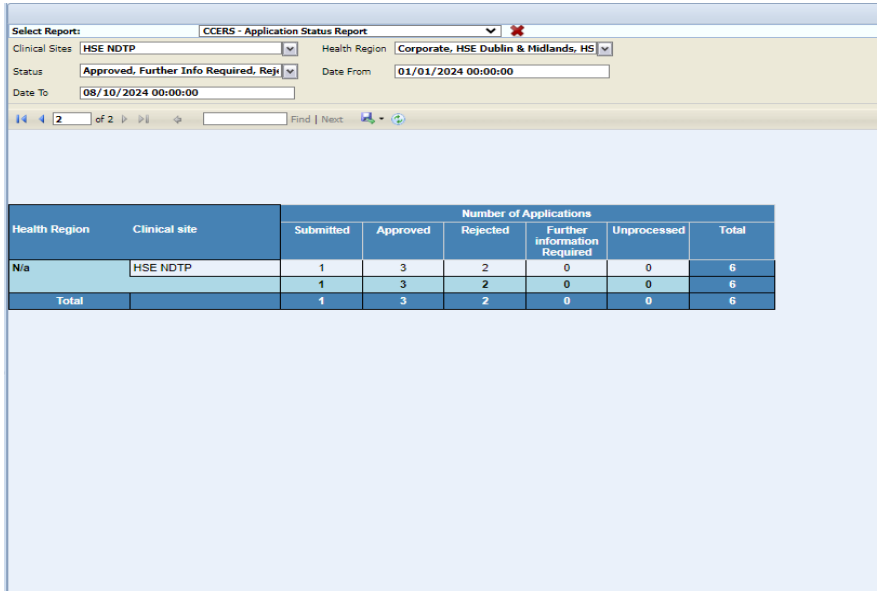
Select the **Save** option

When the download has been completed, the below message will appear at the bottom of thescreen and to view the application select **Open** this will open the excel file

The balance_settings_13204636801808689 3.xls download has completed.
Open
Open folder
View downloads

3.4.1 CCERS - Application Status Report

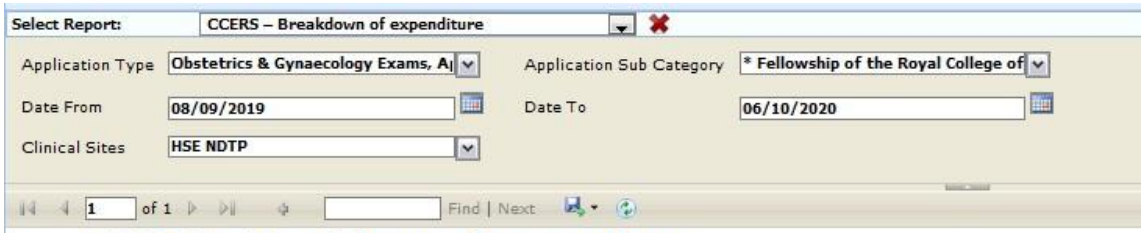
This report can be used to establish the amount of applications per status for each clinical site.



Health Region	Clinical site	Number of Applications					
		Submitted	Approved	Rejected	Further information Required	Unprocessed	Total
N/a	HSE NDTP	1	3	2	0	0	6
		1	3	2	0	0	6
Total		1	3	2	0	0	6

3.4.2 CCERS - Breakdown of Expenditure Report

This report can be used to determine a breakdown on the number of each Application Type and eachApplication Sub Category per clinical site.



CCERS – Breakdown of expenditure

Application Type: All

Application Sub Category: All

Date from: 08/09/2019

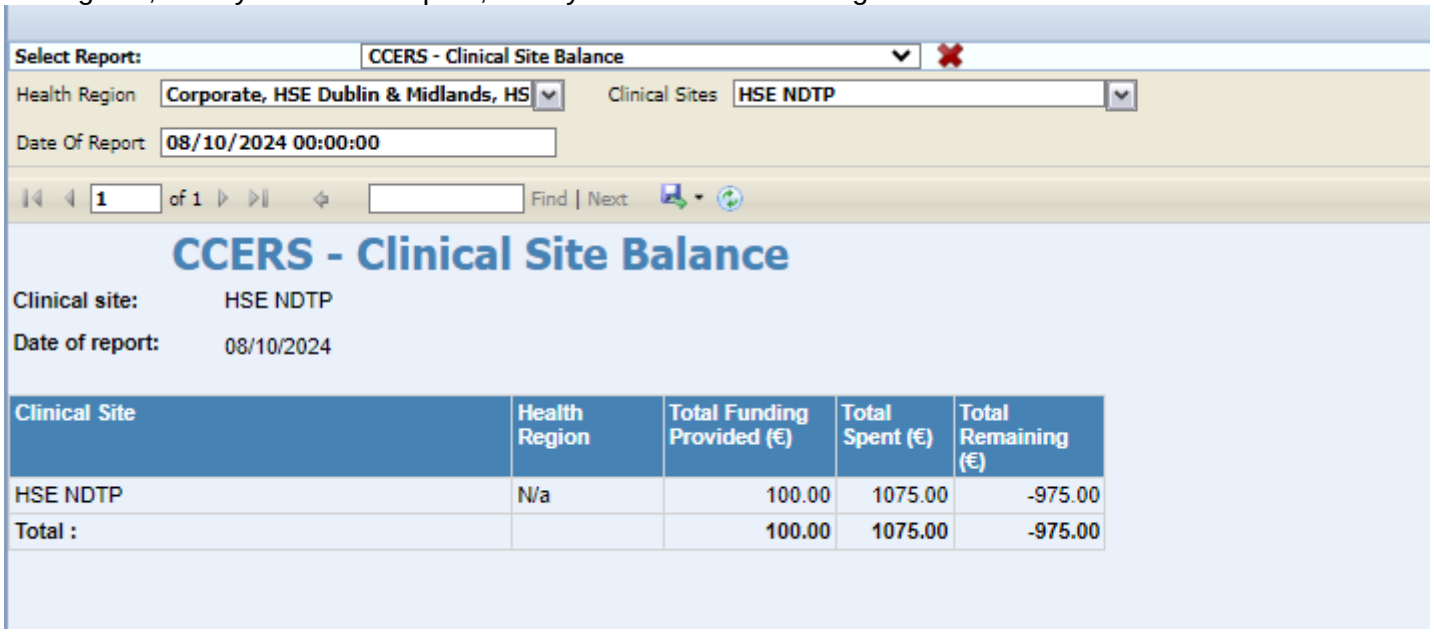
Date to: 06/10/2020

Clinical Site: HSE NDTP

Clinical Site	Application Type	Application Sub Category	Number Attended	Amount Paid (€)
HSE NDTP	Approved Clinical Courses	APLS – Advanced Paediatric Life Support APLS	1	20.00
		PALS - Paediatric Advanced Life Support PALS	1	10.00
		Total:	**2**	**30.00**
	General Practice Exams	Membership of Irish College of General Practitioners – Clinical Competency MICGPCCT1	1	30.00
		Total:	**1**	**30.00**
	Occupational Medicine Exams	Membership of the Faculty of Occupational Medicine of Ireland Part 1 MFOMI 1	1	100.00
		Total:	**1**	**100.00**
	Total:		**4**	**160.00**

3.4.3 *CCERS - Clinical Site Balance Report*

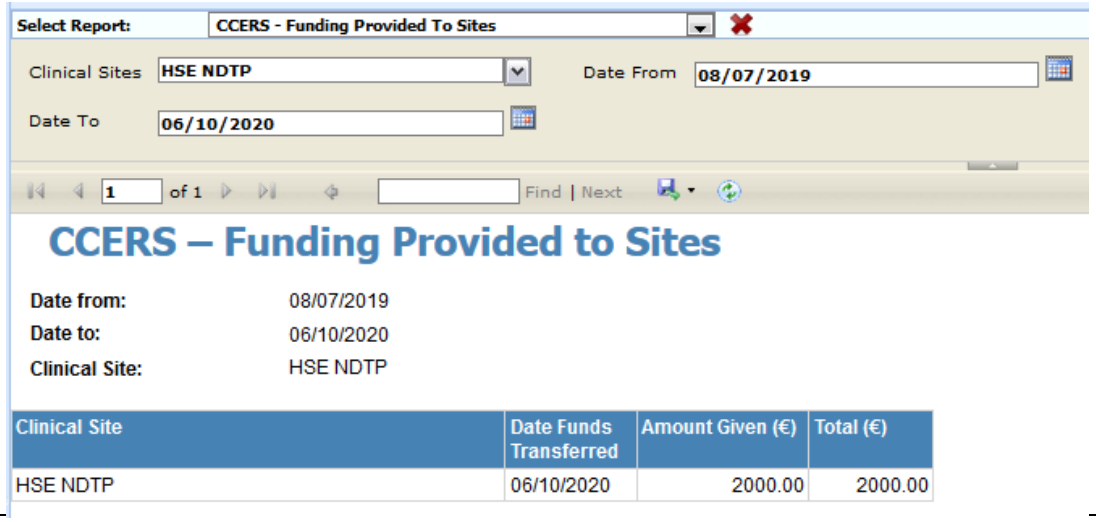
This report can be used to check the status of the funding that has been provided to your site byNDTP i.e. what your site has been given, what your site has spent, what your site has remaining



Clinical Site	Health Region	Total Funding Provided (€)	Total Spent (€)	Total Remaining (€)
HSE NDTP	N/a	100.00	1075.00	-975.00
Total :		**100.00**	**1075.00**	**-975.00**

3.4.4 *CCERS - Funding Provided to Sites Report*

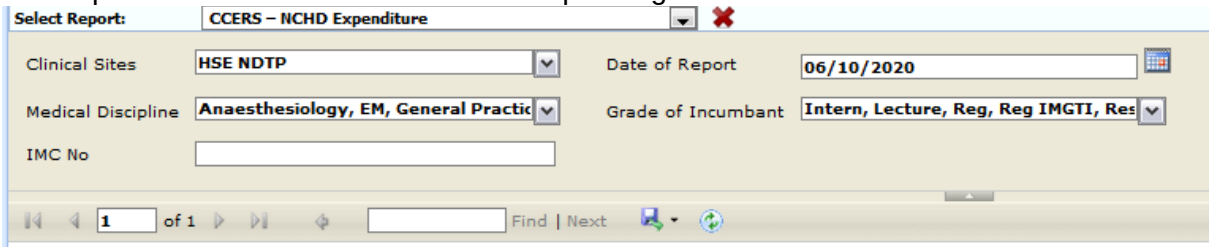
This report can be used to check the amount of funding that was awarded to your site.



Clinical Site	Date Funds Transferred	Amount Given (€)	Total (€)
HSE NDTP	06/10/2020	2000.00	2000.00

3.4.5 CCERS - NCHD Expenditure Report

This report can be used to view a NCHDs spending under the CCERS



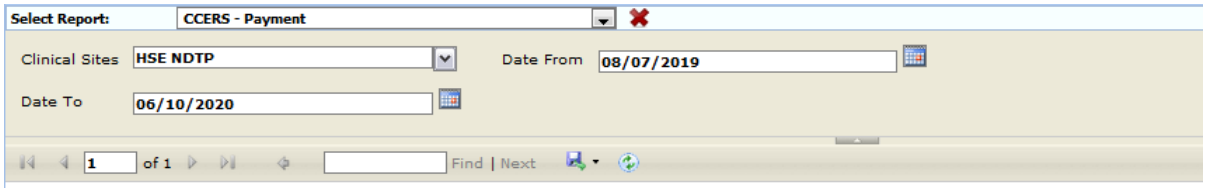
CCERS – NCHD Expenditure

Clinical Site: HSE NDTP
Date of report: 06/10/2020
Medical Discipline: All
Grade of Incumbant: All

Clinical Site	Forename	Surname	IMC Number	Medical Discipline	Grade of Incumbent	Spent (€)
HSE NDTP				General Practice	Reg	60.00
HSE NDTP				Paediatrics	Reg	100.00
HSE NDTP	**Total :**					**160.00**
Grand Total :						**160.00**

3.4.6 *CCERS – Payment Report*

This report can be used to inform your appropriate finance department what is required to beprocessed and how much should be issued to the NCHD relating to any approved applications.



CCERS Payment Report

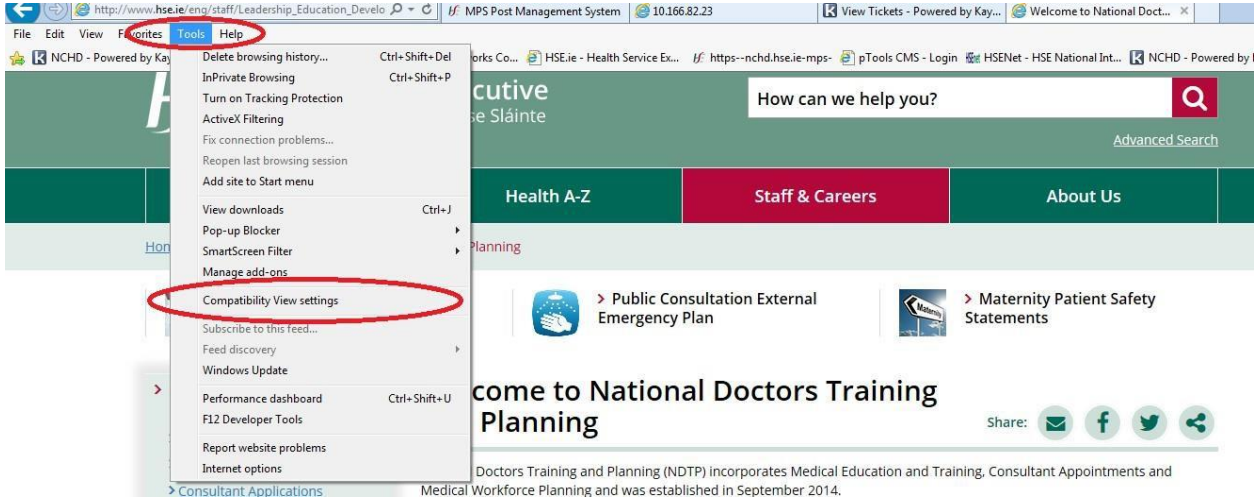
Clinical Site: HSE NDTP
Date from: 08/07/2019
Date to: 06/10/2020

Clinical Site	Application ID	Forename	Surname	PPSN Number	Medical Discipline	Grade of Incumbent	Amount to be Paid Course/Exam (€)	Date Approved
HSE NDTP	24				Paediatrics	Reg	100.00	31/08/2020
HSE NDTP	23				General Practice	Reg	10.00	06/10/2020
HSE NDTP	32				General Practice	Reg	20.00	06/10/2020
HSE NDTP	38				General Practice	Reg	30.00	06/10/2020
HSE NDTP	**Total :**						**160.00**	
Grand Total :							**160.00**	

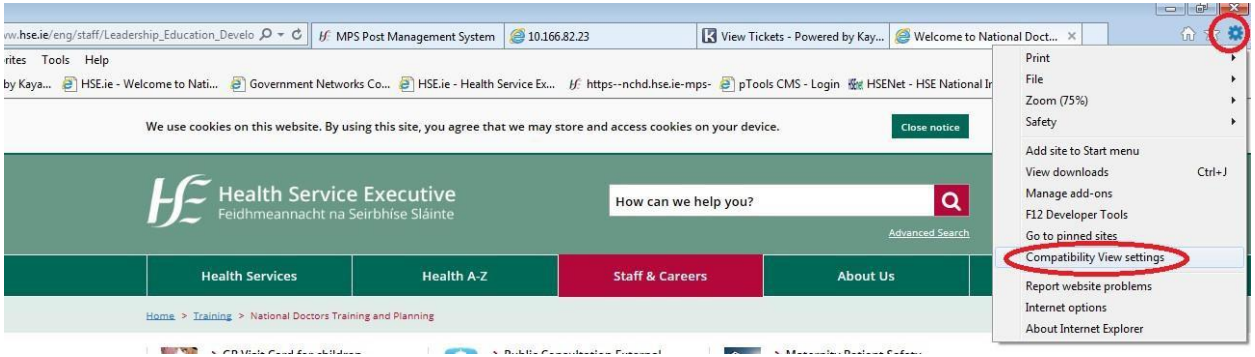
3.5 PC Compatibility Settings

Some browsers have settings automatically selected which will not allow you upload or rotate documents. These settings can be changed within the compatibility option of your browser. If youare having issues with this, please follow the below steps:

1. Select the Settings Cog or ‘Tools’ options:



OR



2. When the compatibility menu opens ensure that the tick boxes are unchecked are per the screenshot below