Intrabiz User Guide

for NCT Practitioners

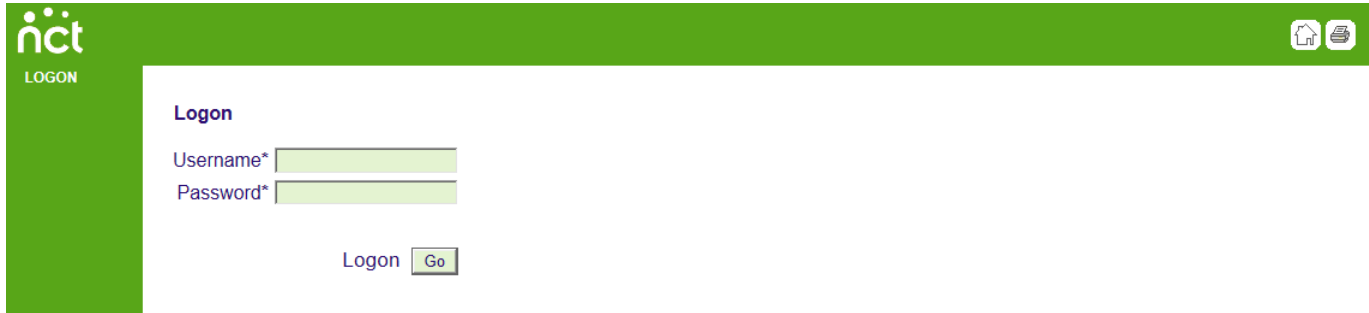# Contents

Introduction to Intrabiz

Access and Logon

To access Intrabiz type in 'nct.intrabiz.co.uk' in the address field or use the following link:
https://nct.intrabiz.co.uk/

You would need to enter your personal Username and Password that is emailed to you when you are set up on Intrabiz by your PSA.

Please do not communicate your login details to anyone. All entries made under your login details can be traced back to you for auditing purposes.

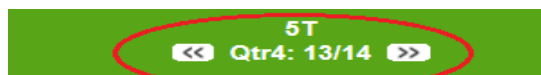For support with log in issues, please contact Intrabiz - Nicola Hilton (nicola@intrabiz.co.uk 0118 978 2625) or Regine Caster (regine@intrabiz.co.uk 0118 979 7079).

Home Page

Title Bar

In the middle of the title bar, you will be shown the PSA Area you are signed into and the current Quarter. You can move between the previous and the next Quarter by using the left or right double arrows.

Your name and your role will be displayed on the right hand side of the screen. If you have more than one role then this will be shown in the drop down box below your name.
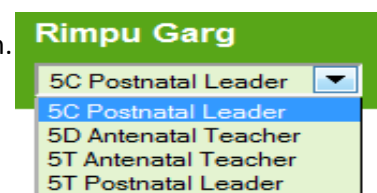
Between the PSA Area name and your name are three icons.
- The first icon is for the 'Home screen' which is the first page you get to after you log on.
- The Print button will give you a print of the screen.
- The help button will give you access to the user manual.

Left hand menu options
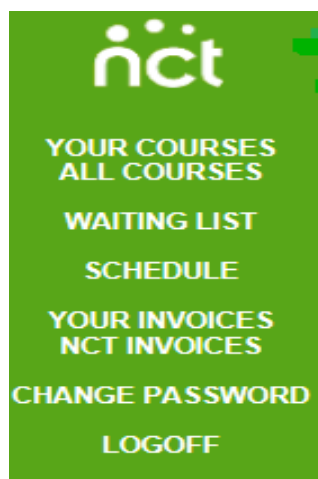
1. YOUR COURSES: This gives a list of all courses that you are running.
2. ALL COURSES: This will give a list of ALL courses in that PSA Area.
3. WAITING LIST: This field has the list of all clients on Waiting List in that PSA Area.
4. SCHEDULE: Schedule of your upcoming sessions can be found under this menu option.
5. YOUR INVOICES: You can use this menu to add new invoices as well as track status of those you have already raised.
6. NCT INVOICES: Under this section will be invoices raised by NCT e.g. your re-registration fee.

You can change your password using the option available in this menu. To logoff from Intrabiz please select the last option available in this menu.

Courses

How to view list of Courses:

You can view Courses in your selected PSA Area by using the different options available in the left hand menu on the home page.

View your courses

In order to view your own courses only i.e. where you are facilitating all or part of a course; select "Your Courses" option in the left hand menu. Intrabiz will give you the list of courses as shown below.

Your Active Courses (click on heading to sort table)

	Ref	Start Date	End Date*	Type	For	CF	Paid	Rsvd	Enq	Avbl	Lpsd	
ⓘ	C1007	06.11.2013	20.11.2013	NCT Signature antenatal	Chiswick & Hammersmith	El	5	3	0	0	0	
ⓘ	C1029	04.12.2013	14.12.2013	NCT Signature antenatal Jan to mid-Feb due dates	Chiswick & Hammersmith	El	6	0	0	0	0	
ⓘ	C116	14.01.2014	14.01.2014	Waterbirth February, March & April due dates	Chiswick & Hammersmith		0	0	0	5	0	Cancelled
ⓘ	C1061	08.01.2014	25.01.2014	NCT Signature antenatal Babies due mid-Feb and March	Chiswick & Hammersmith	El	5	0	0	3	3	
ⓘ	C110	05.02.2014	01.03.2014	NCT Signature antenatal late March & April due dates	Chiswick & Hammersmith		0	0	0	8	0	Cancelling
ⓘ	C1152	05.03.2014	03.04.2014	NCT Signature antenatal late April and May due dates	Chiswick & Hammersmith	El	0	0	1	7	3	<< sign
ⓘ	C1107	03.04.2014	28.04.2014	NCT Signature antenatal late May and June due dates **AT RISK** deadline in 2 days	Chiswick & Hammersmith	On	0	0	0	6	0	

➢ The first column shows the course reference. This reference is unique within your PSA. Against each course reference is a symbol i. By clicking on this symbol, you can get details of that particular course.

➢ The second column shows you the Start Date of that Course followed by the End Date in column 3.

➢ The course type is displayed in column 4 followed by Branch name in column 5.
Under Column 4 "Type" you can sometimes see "AT RISK deadline in x days"(as shown above for course reference C1107). These are courses that have been marked by the PSA on risk of cancellation as they are not currently breaking even.

➢ Column 6 CF shows the Course Finder status. When Course Finder status shows 'On', this means that the course will appear in the course search results on the NCT website if has space available and it fulfils the search criteria used by the clients. EL stands for 'Eligible' which means that the course is full but will appear on the website if spaces become free.

➢ The rest of the columns show number of bookings Paid, Reserved, Enquired and how many spaces are Available or have lapsed.

➢ Towards the end of the Columns you may see certain words to show status of the course e.g. Complete, Cancelled and Cancelling. Or you may see the word "Sign". This means that the Course Assignment Document for that Course needs to be signed by you. Details of the signing process will be explained later in this manual.

The asterisk in the "End Date" column shows that the courses are sorted by the End Date. You can sort the courses according to any column by simply clicking on that heading. Example, if you want to sort the courses alphabetically by 'Type' then click once to arrange it in ascending order or twice for descending order.

NB:
- ❖ *If you have multiple roles or PSA Areas, you would have to select each one of them separately in order to view your courses in that specified role or PSA Area. To move between different roles or PSA Areas, select the dropdown options in the right hand side of the title bar.*
- ❖ *Intrabiz only displays courses that are active or have a session in the current quarter. If you cannot see old courses, it is probably because they are in a previous quarter. To move between quarters, use the two sets of arrows at the top of the screen in the middle of the title bar.*

View all courses

You can get a list of <u>all</u> courses running in your PSA Area (excluding Affiliate courses) by selecting "All Courses" option in the left hand menu.

Find a course by reference, practitioner, branch or venue

Find [Go]

Possible Actions
> View Course Finder courses
> Show Course Finder courses on map

Active Courses (click on heading to sort table)

Ref	Start Date*	End Date	Type	Run By	For	CF	Paid	Rsvd	Enq	Avbl	Lpsd
C1185	02.02.2015	02.02.2015	Early Days (postnatal)	Postnatal Leader (PNL)	Chiswick & Hammersmith	On	0	0	0	8	0
C1167	26.06.2014	26.06.2014	Waterbirth May, June and July due dates	Test Teacher (ANT)	Chiswick & Hammersmith	On	0	0	0	5	0
C1159	20.06.2014	20.06.2014	Twins and Multiples Workshop twins & multiples due late May, June and July	Mary Test (ANT)	North West London	On	0	0	0	6	0
C1177	19.06.2014	26.06.2014	NCT Signature antenatal Jul/Aug due dates	Test Teacher (ANT) Mary Test (BFC)	Hampstead & Camden	No	0	0	0	8	0
ⓘ C1182	05.06.2014	12.06.2014	NCT Signature antenatal Jul/Aug due dates	Rimpu Garg (ANT)	Chiswick & Hammersmith	No	0	1	0	7	0

In this menu you have the option of searching for courses by reference number, name of practitioner, branch or venue. Just type the search criteria in the box at the top of the screen and click on 'Go'.

You can even search by course type. For example, if you want to look for 'Waterbirth' workshop in your PSA Area, then you can type "Waterbirth" in the search criteria and click "Go". Intrabiz will filter out from the entire list and show you only the "Waterbirth" courses.

NB: You will get a list of all courses that are running in that PSA Area in this menu option. However, you will only be able to see details of the courses that are facilitated by you i.e. will have the symbol i for you to click on.

"Possible Actions" give you the option to search for courses that are bookable and are available on the course finder (NCT Website).

In order to view these courses, select "View Course Finder courses" under list of "Possible Actions. This will show you the course title as displayed on the website along with the "Venue", "PC" (Post Code) and the "Places" available on that course.

5T Course Finder Courses (click on heading to sort table)

Start Date*	End Date	Title	Venue	PC	Places
ⓘ 02.02.2015	02.02.2015	Early Days (postnatal) course in Chiswick & Hammersmith Branch - 5T/C1185	Devonshire Day Nursery	W4	8
ⓘ 26.06.2014	26.06.2014	Waterbirth course in Chiswick & Hammersmith Branch for May, June and July due dates - 5T/C1167	Sarah Johnson's Home - Shepherd's Bush, W12	W12	5
ⓘ 20.06.2014	20.06.2014	Twins and Multiples workshop in North West London Branch for twins & multiples due late May, June and July - 5T/C1159	Gracelands Yard	NW10	6
ⓘ 15.05.2014	29.05.2014	NCT Signature antenatal course in Chiswick & Hammersmith Branch for Jun/Jul due dates - 5T/C1180	Chiswick Tennis Club	W4	5
ⓘ 10.05.2014	11.05.2014	NCT Signature antenatal course in Chiswick & Hammersmith Branch for mid–June to July due dates - 5T/C1146	Devonshire Day Nursery	W4	13

NB: Any course where the title is underlined (course #4 in the above example) shows that the course is facilitated by you and hence you have access to the details of this course. Click on the underlined title to get details of the course.

You can also see these courses on the map by selecting the option "View Course Finder courses on map".

How to view course details

You can access more information about the courses being run by you. You can see details such as:
- ✓ Date, Time and Venue of the sessions.
- ✓ Bookings on the course
- ✓ Course Fee
- ✓ Additional Information to clients about the course e.g. Parking, refreshment etc.
- ✓ Public and Confidential class lists
- ✓ Course Assignments (If they are ready)

To get these details, select "Your Courses" in the left hand menu. From the list of courses facilitated by you, select the one that you would like to see the details of. Click on the symbol i next to that course. You will be able to see details of the course as shown below.

1) The first few lines show you the Course Reference, Venue, Course fee and any additional information applicable to the course. You can also see if the Course Finder is set to "Yes" or "No". If it is set to "Yes" then the Course will be visible on the website for clients to book if spaces are available on the course.

2) This is followed by the course schedule. This shows the date/time of the session and any additional notes that may be applicable to a specific session.

3) The schedule is followed by a list of "Possible Actions". If you wish to go back to your list of Courses then please select 'Back to list' option. To view the class list, select either of the two options given. Details of these class lists are explained later in the manual.

4) The next section is "Bookings". Here you can see a comprehensive list of the clients on the course along with their status i.e. Confirmed / Reserved / Enquired or Cancelled.

5) The final section will show the status of Course Assignments i.e. whether they are signed, withdrawn or need to be signed. Details of this can be found later in the manual.

Schedule

When you click on 'SCHEDULE' you will see a list of all the sessions you are due to run in chronological order (as shown below). Date, day of the week, time and venue of the session are included for your reference.

Schedule of course sessions for Rimpu Garg								
Date	Day	Start	End	Provisional	Assign	Venue	Run by	Ref
ⓘ 01.05.2014	Thu	09:00	15:30			Manor Gardens Centre	Rimpu Garg (ANT)	5D/C1113
ⓘ 08.05.2014	Thu	09:00	15:30			Manor Gardens Centre	Rimpu Garg (ANT)	5D/C1113
ⓘ 15.05.2014	Thu	09:00	11:00		100%	Chiswick Tennis Club	Rimpu Garg (ANT)	5T/C1180
ⓘ 22.05.2014	Thu	09:00	11:00		100%	Chiswick Tennis Club	Rimpu Garg (ANT)	5T/C1180
ⓘ 29.05.2014	Thu	09:00	11:00		100%	Chiswick Moran Hotel	Rimpu Garg (ANT)	5T/C1180
ⓘ 05.06.2014	Thu	09:00	12:30		100%	Chiswick Tennis Club	Rimpu Garg (ANT)	5T/C1182
ⓘ 07.06.2014	Sat	09:00	11:00	Provisional	100%	Chiswick Tennis Club	Rimpu Garg (ANT)	5T/C1180
ⓘ 19.06.2014	Thu	09:00	12:30	Provisional	100%	Chiswick Tennis Club	Rimpu Garg (ANT)	5T/C1182
ⓘ 06.08.2014	Wed	09:00	12:00			St Andrew's Church Centre	Rimpu Garg (PNL)	5C/C886

NB:

- ❖ *The schedule will include ALL of your sessions in all the different roles you may have or different PSA Areas covered by you. Example all courses in 5C, 5D and 5T are shown in the above schedule even though the practitioner is logged onto her AN role in 5T.*
- ❖ *If you are a BFC and facilitating a session for an Affiliate course, then that specific session is unlikely to be listed in your schedule. This is because Intrabiz can only add Affiliate teachers to an Affiliate courses.*

Waiting List

This menu option gives you a list of all bookings that are currently on a waiting list due to:
- non-availability of a suitable course
- PSA waiting for more information from clients before booking them on a suitable course or
- Or, if clients are trying to decide between different courses.

Select "Waiting List" from the left hand menu and Intrabiz will show you the list as shown below.

No°	Ref	Clients	EDD	Type	M	T	W	T	F	S	S	D	E	WO	Branch	Postcode	Notes
1	B13557	Clare & David Test	24.03.2014	Twins and Multiples Workshop	M	T	W	T	F	S	S	D	E	No	Chiswick & Hammersmith	W4 1AB	11/9: moved to the waiting list as booking lapsed for NW London course - needs a TM course in Chiswick

Waiting List (click on heading to sort table)

- ➢ The first column shows the waiting list order number.
- ➢ The second column is the booking reference followed by the client name, EDD and the course type.
- ➢ The next few columns before "Branch" show if the client have any preference with regards to day of the week / Day time / Evening / Women only course.
- ➢ The Branch column shows the clients preference for which Branch they would like a course in.
- ➢ This is followed by the client's postcode and any notes associated with the booking which may also explain the reason behind why the clients are on the waitlist.

Client Bookings

Intrabiz gives you the option of looking at detailed record of clients on your courses. Client record includes details such as:

- ✓ Contact details of clients
- ✓ Their Branch name
- ✓ NCT number
- ✓ Other additional information e.g. First baby, Info for NCTP etc.

To get these details go to 'Your courses' and open the course you want to look at by clicking on the symbol i next to it. You will see the list of bookings on this course as shown in the previous section. You can see details of the clients by clicking on the symbol i next to each of them. An example of a client record is shown below.

```
Booking 5T/B13923
Course                      AN Course C1180 (5T/C1180)
Clients                     Sam & John Test
Address                     123 Street
Town                        LONDON
Postcode                    W4 1AB
Phone                       07766 225 511
Email                       abcdef@gmail.com
NCT Number                  2207274
Partner NCT Number          2207285
Birth due date              15.06.2014
First baby                  Yes
Info for NCTP               Expecting twins
Allow in class list         Yes
NCT may contact             No
Third parties may contact   No
How heard                   Friend
Status                      Confirmed on 11.03.2014
Enquiry date                07.01.2014
Pack sent                   11.03.2014
Offer email sent            11.03.2014
Acceptance date             11.03.2014
Confirmed                   11.03.2014
Confirmation sent           11.03.2014

Possible Actions
➤ Back to course
```

Class Lists

As explained in the previous section; class lists are found in the list of "Possible Actions". To get these, click on "Your Courses" in the left hand menu and open the Course for which you need the Class List. Scroll down to the list of "Possible Action" and select "View public class list" or "View confidential class list".

NB: If you are facilitating a BF session on an Affiliate course, you may need to contact your Affiliate teacher in order to get these class lists as you will not have access to these courses in Intrabiz.

Public Class Lists

The 'public class list' is the list which can be distributed to all class participants. All clients on that list have given their agreement to their details being distributed to the class. An example of a public class list is shown below.

<table>
<tr><td colspan="6" align="center">**NCT**</td></tr>
<tr><td colspan="6" align="center">**Chiswick & Hammersmith Branch - 5T/C1182 Class List**</td></tr>
<tr><td colspan="6" align="center">**Run by** Rimpu Garg(07811223344) **with** Mary Test(07800 112 233)</td></tr>
<tr><td colspan="6" align="center">**Venue** Chiswick Tennis Club, Burlington Lane, Chiswick, W4 3EU</td></tr>
<tr><td colspan="6" align="center">This is a test Course.</td></tr>
<tr><td colspan="6" align="center">Parking restrictions apply between 3-4pm.</td></tr>
<tr><td></td><td>**Day**</td><td>**Date**</td><td>**Starts**</td><td>**Ends**</td><td></td></tr>
<tr><td>Session 1:</td><td>Thursday</td><td>05.06.2014</td><td>09:00</td><td>12:30</td><td></td></tr>
<tr><td>Session 2:</td><td>Thursday</td><td>12.06.2014</td><td>09:00</td><td>12:30</td><td>Breastfeeding session. This session will be held at Chiswick Moran Hotel, 626 Chiswick High Road, London, W4 5RY. This session will be facilitated by Mary Test(07800 112 233).</td></tr>
<tr><td>Session 3:</td><td>Thursday</td><td>19.06.2014</td><td>09:00</td><td>12:30</td><td>Postnatal. Date and time to be confirmed.</td></tr>
</table>

Test Teacher   07811223344   15.07.2014
12345 Street
LONDON
W5 1AB
rimpu.garg@nct.org.uk

The 'Public Class' list includes:

- ✓ Course Reference
- ✓ Practitioners' name & telephone number
- ✓ Name and telephone number of any additional practitioner teaching that course
- ✓ Venue details
- ✓ Any notes added to the course e.g. Parking restrictions, refreshment and other information for clients.
- ✓ Course schedule
- ✓ List of clients who have agreed to their details being distributed to the class. The client's name, address and email are followed by their telephone number on the next column and finally their EDD in the last column.

NB - If a participant wishes to be included or excluded from the public class list, you must advise your PSA to make the amendment.

Confidential Class Lists

The 'confidential class list' is for the exclusive use of the teacher. It contains all information on all attendees – including clients who have requested for their information not to be distributed.

NB: There can be some confidential / sensitive data in this class list and hence must NEVER be distributed to the class participants.

Example of the Confidential Class list is shown below.

NCT - CONFIDENTIAL

Chiswick & Hammersmith Branch - 5T/C1182 Class List

Run by Rimpu Garg(07811223344) with Mary Test (BFC)(07800 112 233)

Venue Chiswick Tennis Club, Burlington Lane, Chiswick, W4 3EU

This is a test Course.

Parking restrictions apply between 3-4pm.

	Day	Date	Starts	Ends	
Session 1:	Thursday	05.06.2014	09:00	12:30	
Session 2:	Thursday	12.06.2014	09:00	12:30	Breastfeeding session. This session will be held at Chiswick Moran Hotel, 626 Chiswick High Road, London, W4 5RY. This session will be facilitated by Mary Test(07800 112 233).
Session 3:	Thursday	19.06.2014	09:00	12:30	Postnatal. Date and time to be confirmed.

5T/B13949 Joining Opted in	Test Teacher 12345 Street LONDON W5 1AB rimpu.garg@nct.org.uk Ealing (542)	07811223344 15.07.2014
5T/B13951	Mary Test 1234 Street LONDON W4 6AX abcdef@gmail.com Chiswick & Hammersmith (509)	07711 223 344 15.06.2014 IVF - Expecting twins

The Confidential class list looks very similar to the Public class list. All details in the Public class lists are included in this list but it also includes other confidential details such as:

- ✓ List of ALL attendees. Public Class lists would only show clients who have agreed for their details to be shared in the Public class lists but Confidential class lists has details of <u>all</u> clients attending and that is another reason for not distributing the class list to the participants.
- ✓ The Booking reference of clients e.g. 5T/B13949 as shown in the above example.
- ✓ If you see the word 'Joining' under the course reference, this means that the clients have agreed to become members.
- ✓ Any client with 'Opted in' shown below the course reference, would be the ones who have agreed to share their details on the public class list.
- ✓ Confidential information about client and/or their pregnancy. This is shown in the last column below EDD.

NB: Please remember to go through the notes section for each client as there may be some important information that you may need to be aware of before the course starts.

Course Assignment Document

When a course is added in Intrabiz, a course assignment document is subsequently created for the practitioner facilitating that course. The course assignment is an explicit contract for a fixed assignment, with no promise of future work, clearly agreed between two parties for an agreed price.

The course assignment is emailed to you, as soon as it is approved by the PSA in Intrabiz, for you to sign. This email has a link that will take you to the assignment document. Please follow steps 3-5 shown below to in order to complete the signing process.

Or, alternatively, if you have missed your email, you can see the courses that have the assignment document pending in Intrabiz.

1) Click on "Your Courses" on the left hand menu. As explained in the previous section, this will give a list of all courses facilitated by you. The word "Sign" is appended to any course that has the assignment document approved and awaiting signature from you, as shown below.

2) Open the course that has the word "sign" appended to them by clicking on the symbol i next to that course. Scroll down to the bottom of the screen till you reach the section "Assignments" as shown below. Open the Course Assignment Document by clicking i next to the assignment.

3) Scroll down to the bottom of the Course Assignment Document. There is a drop down option available for you to sign or reject the CAD as shown below.

4) In order to sign the CAD, you need to select the first option from the drop down. Intrabiz will ask for your password. Please enter your login password and select "I accept this assignment".

Fees may be claimed monthly for completed work, or on completion of the course. Fee claims may not be made in advance of work to be done. Fee claims for the course should be submitted no later than 90 days after the last course date, and claims for the reunion no later than 90 days after the reunion date.

Please ensure claims are submitted before the 90 day deadline - NCT shall not be obliged to make any payments of fees if claims are submitted after more than 90 days.

The charity agrees to pay these fees within 30 days of submission of an accurate invoice for fees through Intrabiz. Payment may be delayed if fee claims and claims for expenses both appear on a single invoice, so it is strongly recommended that fees and expenses are claimed on separate invoices.

The total hours claimed by the named Practitioner for this assignment may not exceed the total number of hours stated above. Fees are only payable for client contact time agreed in this schedule and carried out by the named Practitioner. In the event of a course cancellation no fees shall be payable.

This communication is intended to ensure Practitioners and the PSA both have the same expectations about the course to be run. This agreement is void if the Practitioner's License to Practice expires.

Signed by **Rimpu Garg** as PSA on **19th February 2014 at 11:28**

What do you wish to do?*   Sign for your acceptance of this assignment ▼
Please confirm your login password*   ●●●●●●●●●●

I accept this assignment   Go

Cancel   Go

5) If your password is correct then at the bottom of the document the following message will be displayed to show that the above process was successful and the CAD is now signed.

This communication is intended to ensure Practitioners and the PSA both have the same expectations about the course to be run. This agreement is void if the Practitioner's License to Practice expires.

Signed by **Rimpu Garg** as PSA on **19th February 2014 at 11:28**

Signed by **Rimpu Garg (ANT)** as Practitioner on **24th February 2014 at 11:41**

Thank you for signing this course assignment. You can view the signed copy at any time by logging in and viewing the course details. You can also view it by clicking on the link in the original assignment email.

NB: Please remember to scroll down to the bottom of the screen to check the above message. If the password you entered was incorrect, you will see the following message at the bottom of the assignment document.

This communication is intended to ensure Practitioners and the PSA both have the same expectations about the course to be run. This agreement is void if the Practitioner's License to Practice expires.

Signed by **Rimpu Garg** as PSA on **19th February 2014 at 11:28**

Your password was not recognised as one of those you use to login. Please try again.

What do you wish to do?*   Sign for your acceptance of this assignment ▼
Please confirm your login password*

I accept this assignment   Go

Cancel   Go

You would then need to re-enter the correct password and click on "I accept this assignment".

After you have successfully signed the document, you will no longer see 'SIGN' appended in your list of courses.

NB:
- ❖ *Intrabiz will generate an email if there is a change to the assignment document as a result of any change to the course. Please access the latest document from the link in your email or as shown in the above steps.*
- ❖ *You will also get an email if your assignment document is withdrawn. Example if the course is cancelled.*
- ❖ *Please ensure the assignment is signed as soon as you receive them and definitely within four weeks.*
- ❖ *If you reject the assignment document, please email your PSA to explain the issue.*
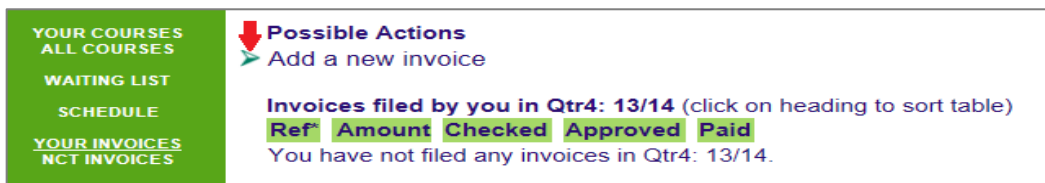
Invoices

There are two menu options available for Invoices – "Your Invoices" and "NCT Invoices". The menu option "Your Invoices" is used to file invoices to claim your fees and for claiming other expenses. "NCT Invoices" is the option to see the amount due by you to NCT - usually the Annual Registration fees.

Your Invoices

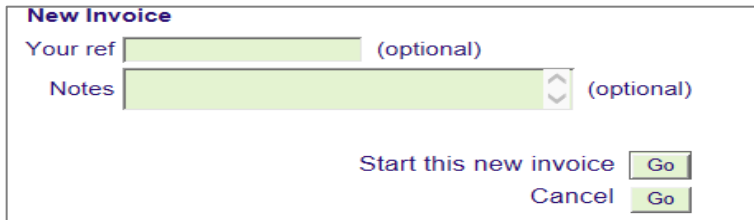When a course is completed, you can file an invoice to get your fees paid.

How to add a new Invoice

1) Click on YOUR INVOICES on the left hand side menu and select 'Add a new invoice' as shown below.
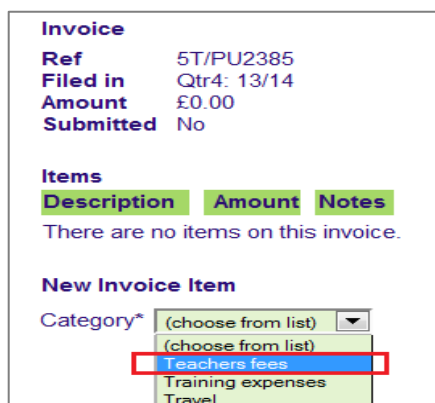
2) Enter your reference number and any notes. These two fields are optional so you can leave it blank unless you want to add some reference or notes for your own information. Click on the go button next to 'Start this new invoice'.

3) The system allocates a unique reference number (5U/PU2384 in this example). Please make a note of that reference on any supporting documents you have.

4) Select the appropriate 'Category' from the dropdown options available. As an example, for an ANT claiming her fees, select "Teachers Fee" from the list available in the field "Category" as shown below.

Here are some dropdown options available in the field "Category", the 'role' they are available for and, broadly, for what purpose they are used:

Category name	Role	Purpose
Teachers fees	ANT, BFC, PNL, BB	To be used to file invoice for teaching fee for courses run by you
BFC fees on AN courses	BFC	To be used by BFC when claiming fee for BF session on an ANT course
Training Expenses	ANT, BFC, PNL, BB	To be used for claiming expenses related to study/ training days, Babble Live etc.*
Travel	ANT, BFC, PNL, BB	To be used to claim for travel related to specific courses facilitated by you
Info Sheets	BFC, PNL	To be used for claiming expenses related to Info Sheets wherever applicable
Telephone	BFC	To be used if claiming for BFC Counselling work.
Client Allowance	Students	To be used by Students when claiming for "Client Allowance" for courses facilitated by them.

If you are claiming travel expenses for study days or Babble Live; use the category "Training expenses". Under the field "Activity" please select "Antenatal Classes" if you are ANT or BBP; "Breastfeeding counselling" if you are a BFC; or "Postnatal Classes" if you are a PNL.

5) After selecting the category "Teachers fees", Intrabiz will give you a list of courses facilitated by you and will include the unclaimed fees in brackets as shown below. Select the appropriate option.

Please note:

✓ This list will only have sessions for which you can claim. You may not be able to claim for sessions that are yet to be facilitated i.e. in the future or for provisional sessions e.g. reunion.

✓ You may be able to enter your claim on the day of your session or anytime after. However, please remember to claim within 3 months of the session.

✓ Any course that shows (£0.00) means that you have already claimed the full amount due for that course. There may be pending reunion sessions in that course but as they are still provisional, you may not be able to claim for those sessions.

6) After you have selected the course from the drop down list, Intrabiz will automatically add the unclaimed amount to the field "Amount". It will also show calculations of how it has arrived at that amount in brackets for your reference.

You can add notes if needed to the above. If you wish to add more claims to this invoice, you may do so by selecting Go next to "Add this item to the invoice".

7) When you select "Add this item to the invoice" in order to add more items to this invoice, Intrabiz will give you the following response. Follow the same steps as above in order to add more claims to this invoice.

Go round this cycle as many times as necessary and finish by clicking on the go button next to 'Finish adding items'.

8) Once you are satisfied that your invoice is complete and correct, click on the action 'Submit this invoice' as shown below.

Once submitted, your invoice will be awaiting approval from your PSA and subsequently, payment from NCT UK Office.

NB:

❖ *Please remember to submit receipts wherever required.*

❖ *If you are invoicing for an expense which covers more than one course then you should split it between the correct courses.*

❖ *If the expense is not related to specific courses then choose the general activities (e.g. 'Antenatal classes') at the bottom of the list.*

❖ *If you are invoicing your fees for giving a breastfeeding session on an antenatal course then use the special 'BFC fees on AN courses' category rather than 'Teachers fees'.*

❖ *Please note that in order to claim for the reunion that was provisionally set up, you must remember to let the PSA know when you are ready to firm up the dates. You can then claim for that reunion on or after the date that of the session.*

How to view status of submitted claims

When you click on YOUR INVOICES on the left hand side menu, the system will display all your invoices raised in the current quarter and their status. You can therefore track when they have been approved and paid.

Please note that you cannot do any modifications once the invoice is submitted for approval.

For any invoices on this list that are not yet completed, there will be a remark "please submit when complete". In order to complete and submit these invoices, please click on the i next to that invoice. You can then add / modify claims on this.

Invoices are settled by BACS transfer. Please ensure you have completed the BACS payment form and return it to UKO, if you have not done so already. Please contact your PSA to get a copy of this form, if required.

NB: You can also view claims submitted in the previous quarter(s) by selecting the double arrow key in the title bar.

NCT Expenses Policy & Allowable Claims

You can find NCT Expenses Policy & Allowable Claims on Babble. Please use the following link to get details: https://babble.nct.org.uk/info-resources/branch-and-volunteer-support/tools-guides/expenses-1st-april-2012-0

NCT Invoices / Re-registration Fee

Your annual re-registration fee is shown under this menu option in Intrabiz. You can view the quarterly invoices by clicking on 'NCT Invoices' in the left hand menu. You will see an Invoice Reference, date and Amount as shown below

Click on the i next to this invoice to see details. The note on the invoice line describes how the figure has been calculated as shown below.

Details of re-registration fee can be found on the following link:

 https://babble.nct.org.uk/info-resources/delivering-services-parents/admin/nct-practitioner-re-registration-fees

Please note that the re-registration fee is deducted from the next fee payment following the end of the quarter. So, if the full amount is not paid on your invoice, the deduction of your re-registration fee could be a reason.

FAQs

Q: How do I logon?

A: You can access Intrabiz by using the URL https://nct.intrabiz.co.uk/ and logon using the Username and Password provided.

Q: How do I change my password?

A: If you click on CHANGE PASSWORD on the left hand side menu, you will be able to change your password to anything more memorable to you.

Q: I do not remember my login / password details. How can I reset them?

A: Please contact Intrabiz Nicola Hilton (nicola@intrabiz.co.uk 0118 978 2625) or Regine Caster (regine@intrabiz.co.uk 0118 979 7079) and they can reset your password and email your user name and password for you to logon.

Q: How do I know what sessions I am doing next?

A: You can access your entire schedule of forthcoming courses in Intrabiz. Click on "Schedule" in the left hand menu. You will be able to see date, time and venue of your next sessions. This list is inclusive of all sessions scheduled for you in all PSA Areas and different roles you may have. The only exception is; if you are a BFC facilitating a session on an Affiliate course, that session will not be listed in your schedule.

Q: How can I find phone number(s) of the other practitioner(s) on the course?

A: The phone number of the other NCTP on the course can be found in the class list.

Q: Where can I find address / contact details of the venue?

A: The address of the venue can be found on the class list. If the venue has an emergency contact number stored in their record, then this will be shown in the confidential class list.

Q: Where do I find if there are any notes about clients that I should be aware of before the course starts?

A: If the clients have any additional information about themselves and/or their pregnancy this is added in the 'Info to NCTP' field in Intrabiz. You can see this in the confidential class lists or on the individual client booking record which you can access by clicking on i next to that booking (details in the "Client Booking" section).

Q: Can I see more details of clients than the ones shown on the class lists e.g. is it the client's first baby?

A: Yes, you can see details of clients by looking at their booking record. Please see one of the previous sections titled "Client Bookings".

Q: How do I know that I have pending Course assignment documents?

A: When you select 'Your courses' option in the left hand menu; any course with an unsigned assignment document will explicitly show "SIGN" added next to that course.

Q: Where can I find the Course assignment document? How do I sign / reject the course assignment document?

A: Open the course by clicking on i next to the course. You can find the course assignment document if you scroll down to the bottom of the course details. Follow steps shown on page 12-13 in order to sign/reject the document.

Q: How can I find out what the allowable claims are? Where do I find out what mileage I can claim?

A: You can find the NCT Expense policy and allowable claims in Babble using the following link
https://babble.nct.org.uk/info-resources/branch-and-volunteer-support/tools-guides/expenses-1st-april-2012-0
Document titled "Expense policy from 1st April 2012" will give details of the policy.

Q: Why can't I claim for a session? Why is it not appearing in the dropdown list of courses?

A: You can claim for a session on or after the actual date of the session but within 3 months. If you are unable to claim for a session, the possible reasons are
- The date is in future
- The course is now 'Closed' i.e. more than 3 months have passed since the last session on the course.
- The session you facilitated was a BF session on an Affiliate course. This will not appear in Intrabiz as Intrabiz only allows Affiliate teachers to be added to an affiliate course. You will need to contact your Affiliate for these sessions.
- You may be searching for a session that you facilitated in a different PSA Area or different role you may have. Please make sure to select the appropriate PSA Area or Role from the dropdown box on the right hand side of the 'Title Bar'. See page 2 for details.

Q: Why am I not able to claim for the Reunion?

A: The Reunion dates are usually provisionally set up. In order to claim for these Reunion, the date needs to be firmed up in Intrabiz. Please remember to notify your PSA of the Reunion dates when they are confirmed so that they can amend Intrabiz accordingly. You will then be able to claim on or after the date of the Reunion.

Q: Why have I not received the full amount of my course?

A: In all likelihood, the reason for this is the deduction of re-registration fee. The re-registration fee is deducted every quarter from the next fee payment.

Q: What is Re-registration fee and how is this calculated?

A: You can see the re-registration fee and how it is calculated under 'NCT Invoices' option in the left hand menu. For a more general explanation, please see the following link on Babble:
https://babble.nct.org.uk/info-resources/delivering-services-parents/admin/nct-practitioner-re-registration-fees

Q: I am not sure of the category to assign my expenses to?

A: The field "Category" has different options available in the dropdown list depending on your role. Based on the claim type, see the table on page 15 for some ideas on the category to select. If you think your claim type does not fall under any of the listed categories, please contact your PSA.