



## Searching and Filtering Courses in the CRM

By Heather Reynolds

Are you looking to meet specific Core requirements for your Continuing Education? Do you need to meet specific CEU requirements to qualify for Certification?

Many operators inquire with the EOCP Office about which courses qualify as core as they want to meet their requirements for Certification in the most effective way.

While we are always happy to discuss your specific needs via email or phone, below is a How-To for Searching and Filtering Courses within the CRM:

### How to Search and Filter Courses in the CRM

1. Login in your CRM profile – you can access your login at <https://crm.eocp.ca/>
2. On the top blue tool bar, Click Career Management
3. Click Courses
4. You have the option of looking at two categories:
  - a. **Scheduled** Courses – events that EOCP has been advised of. Please note that this list is dependent on updates from Training Providers regarding their upcoming training opportunities
  - b. **All Courses** – the full and complete list of EOCP Recognized Training. This listing grows all the time.
5. Using the filters and searching, you can reduce the list of recognized courses down to a more manageable size. The filter options are:
  - a. Course Type
    - i. Distance Education (Online/Virtual)
    - ii. Course
    - iii. In-House Training
    - iv. Special Event (conferences)
  - b. Course Number
    - i. Search field, if you know the course number
  - c. Course Title
    - i. Search field, if you know the approximate course title
  - d. Core
    - i. BWD
    - ii. BWS
    - iii. SWS
    - iv. SWWS
    - v. WD
    - vi. WT
    - vii. WWC
    - viii. WWT



# EOCP

Environmental Operators  
Certification Program

201-3833 Henning Drive  
Burnaby, BC V5C 6N5

eocp@eocp.ca  
www.eocp.ca

T 604.874.4784 F 604.874.4794  
Toll Free 1.866.552.EOCP

- e. Training Provider
  - i. Search field, if you know the approximate Organization Title
- f. General Search Bar – here you can enter numbers, course key words, and you can complete search on your filter list.

*Please note – this also works on the mobile version of the site, with only a small difference. Once logged in, use the Right-hand menu options to select Career Management > Courses and from there you are given the same options as above.*

*Example – You want to complete a Virtual Course that is core for WWC to meet your CEU Reporting Period.*

1. Login into the CRM
2. Click Career Management > Courses > All Courses
3. Using the Course Type Filter – select Distance Education
4. Using the Core filter – select WWC only

EOCP | Customer Relationship Manager Settings Logged in: Reynolds

Home CRM Action Items Career Management Finance Reporting

Home > Career Management > Courses

**COURSES** New Course Application

These courses represent opportunities for Operators to meet/maintain education for CEU requirements. There is no implied endorsement that any course on its own will meet the requirements for any specific exam.

SCHEDULED **ALL COURSES**

Course Type Course Number Course Title Core Training Provider Status Search

COURSE	TITLE	TYPE/METHOD	SEARCH	PROVIDER	RELATED	CEU
7073	Utility Management	Distance Education	Clear Selected Items <input checked="" type="checkbox"/> WWC	State Sacramento		2
7076	Manage for Success	Distance Education	All Cores <input type="checkbox"/> BWD <input type="checkbox"/> BWS WT. WWC. WWT. SWWS. SWS. BWD	University, Sacramento (CSUS)		4.5

You then have a list of only the courses that are

Distance Education and are core for WWC. Using the Search field, you can further search through the list – or you can scroll and click to view the course details.

FINALLY – click on the course to open the course details and access the Training Provider information. From here, you can contact the Provider via email with any inquiries about the course material or enrollment options.

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If you have questions about your specific circumstance and requirements, please contact the office at [eocp@eocp.ca](mailto:eocp@eocp.ca) and we are happy to help!