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(54) Title: METHODS AND SYSTEMS FOR FACILITATING EDUCATION

(57) Abstract: The present inventions provides methods for facilitating occupation-related education, the method comprising the step of: transferring information relating to a future ongoing education session between (i) a database owned, administered or controlled by a first entity and (ii) a database owned, administered or controlled by a second entity, wherein the first entity is a provider or a promoter of the future ongoing education session, and the second entity is a communicator of the future ongoing education session to a potential attendee; and wherein the potential attendee is registered with or otherwise known to the second entity.

## **METHODS AND SYSTEMS FOR FACILITATING EDUCATION**

### **FIELD OF THE INVENTION**

The present invention relates to the field of occupational-related education of personnel,  
5 and particularly to computer-related methods and systems for communicating information  
relating to education sessions to potential attendees.

### **BACKGROUND TO THE INVENTION**

The ongoing education and training of personnel is an important part of many occupations,  
10 assisting individuals to maintain and expand knowledge and skills relevant to their vocation.

For certain occupations (and particularly for the professions) participation in ongoing  
education is mandatory, with the renewal of a registration or license to practice in a  
profession being contingent upon the completion of a set number of hours. Such  
15 requirements are often known as “continuing professional development” or “continuing  
professional education”. Minimum standards for ongoing education are typically set by  
statute or the code of a professional organization, and are often measured in terms or hours  
completed, or credit points earned. As an example, in order to maintain membership of the  
Certified Practising Accountants of Australia, a member must complete 120 hours of  
20 continuing professional development over a period of three years.

A more complex example is noted for medical practitioners in Canada where certification is  
provided by the Royal College of Physicians and Surgeons of Canada (RCPSC) and the College  
of Family Physicians of Canada (CFPC). The RCPSC is responsible for the development and  
25 implementation of all certifying examinations in each specialty other than Family Medicine.  
Specialist physicians who join the Royal College as Fellows maintain their knowledge, skills,  
competence and performance through participating in the Maintenance of Certification  
Program. For each five year cycle, fellows of the college are required to document 400  
credits, with a minimum of 40 credits obtained in each year of the cycle. Credits are earned  
30 at one to two credits per hour, based on the type of learning activity. The CFPC requires 250  
credit-hours over a five year cycle. Fifty credits must be obtained for each year of the cycle.

To earn and maintain fellowship within the college, an additional 24 credit-hours of higher level learning are also required over each learning cycle.

5 Even for simple schemes (and more so where requirements are more complex), it is a challenge for many professionals to keep track of the credits earned. This problem is exacerbated where a minimum number of hours must be earned in a number of specific subject area, or where a maximum number of credits may be earned by private study, as distinct from public presentations.

10 It is a further problem for participants in ongoing education to identify sessions that are suited to their particular circumstances and requirements. Individuals (and particularly professionals) are exposed to a large number of email messages, flyers, telephone calls, advertisements and the like offering ongoing education. The task of selecting an appropriate, convenient, relevant or affordable training session is not insignificant and can  
15 consume appreciable time and effort. This problem extends to ongoing education providers who have difficulty in targeting marketing of sessions to suitable individuals or organizations. A further problem is that some ongoing education regimes require that credits can only be earned on pre-approved education sessions.

20 Given the importance of ongoing education, proof of attendance at a session may be required. Many professional associations and statutory bodies conduct regular audits of individuals' educational activities to ensure that requirements are being met. Typically, proof of attendance is provided by the individual signing an attendee list. This approach is cumbersome, prone to misuse, and complicates reporting to an auditing body.

25 Many ongoing education regimes allow for a certain number of hours of private study to count as credit. In that case, it is difficult for an individual to predict whether the study material (such as newspaper article, magazine article, trade journal, or video) will be acceptable to an association or other authority, and if so how many credits should be  
30 claimed.

Even where ongoing education requirements are not required or enforced, such education is nevertheless desirable for many occupations in order to maintain or increase quality standards in an organization. In some instances it may be necessary to keep a track of sessions undertaken for internal purposes.

5

It is a further problem that occupation-specific associations (and particularly professional associations) are experiencing decreased revenues associated with the provision of ongoing education. There are many new entrants into the ongoing education market, leading to erosion of market share for the professional associations.

10

Occupation-specific associations typically require more complete information regarding the ongoing education activities of their members. Associations generally only have information of education sessions that they themselves have offered, and are often unaware of member enrolment in sessions run by alternative providers.

15

It is an aspect of the present invention to overcome or ameliorate one or more problem of the prior art.

The discussion of documents, acts, materials, devices, articles and the like is included in this specification solely for the purpose of providing a context for the present invention. It is not suggested or represented that any or all of these matters formed part of the prior art base or were common general knowledge in the field relevant to the present invention as it existed before the priority date of each claim of this application.

25

### **SUMMARY OF THE INVENTION**

In a first aspect the present invention provides a method for facilitating occupation-related education, the method comprising the step of: transferring information relating to a future ongoing education session between (i) a database owned, administered or controlled by a first entity and (ii) a database owned, administered or controlled by a second entity, wherein the first entity is a provider or a promoter of the future ongoing education session, and the second entity is a communicator of the future ongoing education session to a

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potential attendee; and wherein the potential attendee is registered with or otherwise known to the second entity.

5 In some embodiments, the first entity is an occupation-related association, or an industry-related organization, or a statutory body charged with overseeing the ongoing education of an occupation. Preferably the occupation-related organization is a professional association.

Preferably, the second entity is not an occupation-related association or an industry-related association, or a provider of an ongoing education session.

10

In some embodiments, the first entity database holds information relating to at least 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, 70, 75, 80, 85, 90, 95 or 100 ongoing education sessions.

15 In other embodiments, the second entity database holds information relating to at least 100, 150, 200, 250, 300, 350, 400, 450, 500, 550, 600, 650, 700, 750, 800, 850, 900 or 1000 ongoing education sessions.

Preferably, the method is a computer-implemented method.

20

In some embodiments, the method comprises the further step of transferring information relating to one or more future ongoing information sessions to the potential attendee.

25 In a second aspect the present invention provides an electronic database comprising information relating to (i) a plurality of ongoing education sessions and (ii) a plurality of potential attendees. The database may comprise information relating to at least 100, 150, 200, 250, 300, 350, 400, 450, 500, 550, 600, 650, 700, 750, 800, 850, 900 or 1000 ongoing education sessions. In some embodiments, the database comprises information relating to  
30 at least 100, 200, 300, 400, 500, 600, 700, 800, 900, 1000, 2000, 3000, 40000, 5000, 6000, 7000, 8000, 9000, 10000, 15000, 20000, 30000, 40000, 50000, 60000, 70000, 80000, 90000, 100000, 200000, 300000, 400000, 500000, 600000, 700000, 800000, 900000 or 1000000 potential attendees.

Some embodiments of the method comprise use of means for recording attendance at an ongoing education session. Preferably the means for recording attendance at an ongoing education session is an optical code readable by a dedicated application residing on a portable processor-based machine of the potential attendee. In a highly preferred form of the method the optical code is a QR code, which optionally provides a validation code.

In some embodiments, the method comprises the further step of transferring information relating to attendance as captured by the portable processor-based machine to any other individual or organization.

In a third aspect the present invention comprises an application for execution on a portable processor-based machine comprising a set of executable instructions providing for one or more of the following functions: (i) notifying a user of a future ongoing education session, (ii) allowing the user to access more detailed information on a future ongoing education session, (iii) allowing a user to book a future ongoing information session, (iv) allowing a user to pay for a future ongoing education session, (v) directing information relating to a future ongoing information session to be saved in an electronic calendar, (vi) capturing an optical code containing information (and optionally validation information) relating to an ongoing education session, (vii) transferring information (and optionally validation information) relating to an ongoing education session to a remote electronic database.

In a fourth aspect the present invention provides a text-based or video-based study material comprising an optical code, wherein the optical code comprises information relating to ongoing education.

A fifth aspect of the present invention provides a system for facilitating occupation-related education, the system comprising (i) an electronic database comprising information relating to (a) a plurality of ongoing education sessions and (b) a plurality of potential attendees, and (ii) a portable processor-based machine having an application for execution on the portable processor-based machine comprising a set of executable instructions providing for one or more of the following functions: (a) notifying a user of a future ongoing education session,

(b) allowing the user to access more detailed information on a future ongoing education session, (c) allowing a user to book a future ongoing information session, (d) allowing a user to pay for a future ongoing education session, (e) directing information relating to a future ongoing information session to be saved in an electronic calendar, (f) capturing an optical  
5 code containing information (and optionally validation information) relating to an ongoing education session, (g) transferring information (and optionally validation information) relating to an ongoing education session to a remote electronic database.

In some embodiments the system further comprises an optical code encoding information  
10 relating to an ongoing education session, or a text or video-based material.

### **BRIEF DESCRIPTION OF THE FIGURE**

Figure 1 is a diagrammatic representation of the components required by the system described in Example 1, and also the flow of information between those components.  
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### **DETAILED DESCRIPTION OF THE INVENTION**

After considering this description it will become apparent to one skilled in the art how the invention is implemented in various alternative embodiments and alternative applications. However, although various embodiments of the present invention will be described herein,  
20 it is understood that these embodiments are presented by way of example only, and not limitation. As such, this detailed description of various alternative embodiments should not be construed to limit the scope or breadth of the present invention. Furthermore, statements of advantages or other aspects apply to specific exemplary embodiments, and not necessarily to all embodiments covered by the claims.

25

Unless the contrary intention is expressed, the features presented as preferred or alternative forms of the invention can be present in any of the inventions disclosed as alone or in any combination with each other.

30 Throughout the description and the claims of this specification the word "comprise" and variations of the word, such as "comprising" and "comprises" is not intended to exclude other additives, components, integers or steps.

The present invention is predicated at least in part on Applicant's finding that ongoing education of personnel may be facilitated by computer-based methods and systems that include interconnected databases of two entities. Providers or promoters of ongoing education sessions upload details of future sessions from a first database to a second database of a second entity. Potential attendees are forwarded (or retrieve) information on future ongoing education sessions from the second entity database. Accordingly, in a first aspect the present invention provides a method for facilitating occupation-related education, the method comprising the step of: transferring information relating to a future ongoing education session between (i) a database owned, administered or controlled by a first entity and (ii) a database owned, administered or controlled by a second entity, wherein the first entity is a provider or a promoter of the future ongoing education session, and the second entity is a communicator of the future ongoing education session to a potential attendee; and wherein the potential attendee is registered with or otherwise known to the second entity.

15

Applicant proposes that the method including a second entity that communicates the availability of a future ongoing education session to a registered potential attendee is distinguished from and advantageous over existing methods. The second entity in the function of communicator is capable of receiving details of a large number of training sessions, identifying an education session potentially appropriate to a potential attendee, and communicating details of the session to the potential attendee. The second entity (and therefore any database owned, administered or controlled thereby) occupies a central role in facilitating (i) the communication of educational opportunities to a pre-qualified client base, and (ii) the selection of potentially appropriate education sessions by a potential attendee.

25

The first entity may be any person or organization that is involved in the provision or promotion of an ongoing education session. Education providers typically perform one or more of the following tasks in the normal course of business: develop content; retain a teacher, lecturer, tutor, or facilitator to conduct a session; organize a venue and/or catering to host the session; produce written, video or audio materials for use within a session,

30

organize transport and/or accommodation for attendees, market and/or sell an education session.

As used herein, the term "ongoing education" is intended to mean any education of an individual that pertains to that individual's occupation, and is undertaken in an effort to maintain or improve or otherwise fortify the individual's performance in the work place. The occupation may be a profession, a trade, a skilled role, semi-skilled role, or an unskilled role.

Included in the scope of "ongoing education session" is any lecture, tutorial, conference, seminar, webinar, workshop, demonstration, instructional course, reading program, discussion, role play, use of an interactive computer program, testing regime, private study, and the like. The ongoing education may be live, recorded or transmitted from a location remote to the attendee. The ongoing education may be expressed in any manner selected from one or more of the following: live performance, sound recording, video recording, streaming video (including delayed transmissions), streaming sound (including delayed transmissions), or document.

The first entity may be an educational provider selected from (but not limited to) the following: a university (public or private), a college (public or private), a company (public or private), a school (public or private), a church, or an individual.

Alternatively, the first entity may be an individual or organization not involved in the provision of education (or at least the provision of education is not their primary activity, business or charter) and may be an individual or organization involved in the promotion of education sessions. In certain embodiments, the first entity may be an occupation-related association or industry-related organization. Such organizations are often involved in the dissemination of information of future ongoing educational session that may be of interest to their members.

Preferably the occupation-related organization is a professional association. Members of the professions are typically required to complete a certain level of ongoing education as

part of maintaining their registration or license to practice their profession. Given the higher criticality of ongoing education of professionals, the present invention provides very significant advantages. Professionals include: financial professionals (such as accountants, financial planners, bankers, insurance consultants, stock brokers, actuaries and the like),  
5 legal professionals (such as lawyers, barristers, solicitors, attorneys and the like), health professionals (such as medical practitioners, pharmacists, optometrists, veterinary practitioners, dentists, nurses, physiotherapists, psychologists, speech therapists, occupational therapists, massage therapists, acupuncturists and the like), technical professionals (such as engineers, land surveyors, pilots, and the like) educational  
10 professionals (such as teachers, lecturers, tutors and the like). It will be understood that the aforementioned professions are not intended to define an exhaustive list, and are merely exemplary.

The present methods, systems and applications are particularly advantageous to  
15 professional associations given that they are funded primarily through membership fees and income derived from the provision of ongoing education activities by the professional association or through the professional association accrediting third party providers to deliver appropriate education to their members.

20 Furthermore, professional associations typically do not require members to undertake their ongoing education with their association and the vast majority do not require third party providers' content to be accredited with them. Accordingly, professional associations must compete with other associations and other third party education providers for the custom of their members. The present methods, systems and applications provide professional  
25 associations a competitive advantage in the marketing of education sessions.

The present methods, systems and applications allow a professional association to review the nature and extent of ongoing education activities undertaken by their members by reference to the bookings placed through the second entity. This information enables the  
30 association to ascertain any gaps and opportunities in its education offerings, and assess at an early stage and monitor from an audit perspective where any member may be at risk of

not completing their education requirements. Necessary support to help manage and resolve shortfalls in a timely and effective manner can be provided.

5 Professional associations can also market all of their ongoing education offerings directly to potential attendees and bypass ineffective email marketing campaigns. As members are able to select preferences to suit their own interests, professional associations need not be concerned about member "email fatigue".

10 The more direct involvement by occupational associations in marketing by virtue of the present methods, systems and applications provides for a competitive advantage. Particularly, the association's offerings may be promoted through an association-branded version of a dedicated smart phone application as described *infra*.

15 Occupational associations will also be allowed the opportunity to broaden their marketing reach to non-members who are able to view their educational offerings through a website or dedicated smart phone application of the second entity.

20 In some embodiments the first entity is a statutory body charged with overseeing the ongoing education of an occupation. As for professional associations, statutory bodies may dictate (or at least provide guidance) to occupational groups as to the type of ongoing education that will satisfy requirements. While statutory bodies are not typically reliant on income provided by ongoing education, these bodies will be advantaged given the ability to track an individual's progress in achieving the required credits, and intervene early if a shortfall is probable. Statutory bodies may also suggest or promote certain educational  
25 sessions that will satisfy requirements if attended.

30 The second entity may be any individual or organization capable of having a role in ongoing education according to the methods, system and applications described herein. In certain embodiments, the second entity is not an occupation-related association, or an industry-related association, or a statutory body charged with overseeing the ongoing education of an occupation.

In a further embodiment the second entity is not a provider of an ongoing education session.

5 Included in the present methods is the step of transferring information between a database of the first entity and the second entity. As used herein, the term “between” is intended to include a one-way transfer of information (from first the first entity to the second, or *vice-versa*), and also a two-way transfer of information.

10 The step of transferring does not necessarily require an active step on the part of both the first and second entities. For example, the first entity may grant the second entity read and/or write access to their member database. In that case the second entity may retrieve data from the first entity database, with the first entity having no active role. Thus the step of transferring is accomplished only by the actions of the second entity. Conversely, the second entity may transfer information to the first entity database, and again the first entity  
15 has no active role.

As further example, the second entity may grant the first entity read and/or write access to their member database. In that case the first entity may retrieve data from the second entity database, with the second entity having no active role. Thus the step of transferring  
20 is accomplished only by the actions of the first entity. Conversely, the first entity may transfer information to the second entity database, and again the second entity has no active role.

25 The step of transferring does not necessarily require an active step on the part of either the first or second entities, and may directed by a third entity.

Where the transfer of information between the first and second entity databases is direct, one or more interfaces may be disposed between the databases. The purpose of these interfaces is to ensure that information forwarded by one entity is receivable and  
30 understandable by the other entity.

For example, the transfer of information may be facilitated by an application programming interface (API) to allow for a third party (such as a user of ongoing education, or a provider

of ongoing education) to send information to and receive information from a database of the second entity.

5 There may also be provided a content API that allows third parties to add / edit or delete content in the second entity database. The third party may initiate the conversation by sending an XML formatted message to a webservice of the second entity, The XML message typically contains logon information, the action to perform, and the required information for the performance of the action.

10 When adding details of a future education session, the required information may include one or more of: title, description of session, date, time, dickthru url, and unique provider identification code.

15 In response to the message sent by the third party, the second entity may return an XML formatted message. This message could contain a status to indicate the success or failure of the requested action. Upon failure, an error message may be returned to indicate the nature of the problem...

20 Upon success, the information may be returned based on the requested action. For example, when adding or updating content, the response may include a code allowing for the identification of the session, a token for the session, or the URL of the generated QR code.

25 There may also be provided an action API to allow a third party to receive user ongoing education actions in real-time, or close to real-time. For example, the second entity may initiate the conversation in response to a user recording a CPD event in the second entity database. The message may be a standard https POST request.

30 A number of factors determine the information that may be in the request. Some relevant factors include: whether the user is using an application of the second entity or an application of the first entity (such as an occupational association), whether the user has recorded their association membership details in the application, the identity of the

educational content provider. Based on the aforementioned factors, the following information may be sent through to an association or content provider.

5 Where the occupational association or content provider has an existing relationship with the user in relation to that particular item of content (and therefore already has the user information), then the following information may be sent: first name, last name, email, association member number, content identification code, provider identification code, date and time the user recorded attendance at the ongoing education session. If the user is a member of one or more associations, then the above information may also be sent to those  
10 associations.

Where the association or content provider does not already have a relationship with the user in relation to that particular item of content, then the following information may be sent: content identification code, provider identification code, date and time the user  
15 recorded attendance at the ongoing education session. Note that no user identifying information will be sent.

The third party typically then returns an acknowledgment to indicate that they have successfully received the message.  
20

A complex interface may not be required where the first and second entities have previously agreed on the information fields to be transferred. In that case, information may be transferred as delimiter-separated text data file, such as a simple comma separated values (CSV) file.  
25

It will be appreciated that the transfer of information need not be direct, and it is contemplated that one or more databases or servers may be operationally disposed between the first entity and second entity databases. Preferably the information is transmitted between the first and second entities by way of secure connection.  
30

In alternative embodiments, no electronic connection exists between the databases of the first and second entities. In such arrangements, information on a future ongoing education

session may be transferred manually. Thus, an individual of the first entity may manually retrieve information relating to a session from the first entity database, and transfer that information (by whatever means) to an individual of the second entity. The individual of the second entity may then manually enter the relevant information into the second entity database. These embodiments are preferred where, for example, either the first or second entity is not prepared to provide the other entity with read and/or write permissions to their respective database, or where the second entity requires the information in a particular form, or where connection of databases or the transfer of information is technically difficult or unfeasible.

10

As used herein, the term “information” is intended to include information relating to an ongoing education session. Without the intent of limiting the scope of the present invention the information may include one or more of the following: session title, outline of session content, details of session presenter, session location, session date, session cost, session starting time, session finishing time, session duration, number of ongoing education credits awarded upon completion of session, and the like.

15

The term “information” further includes information relating to a potential or actual attendee of an ongoing education session. Exemplary information in this regard includes one or more of the following: attendee name, attendee email address, attendee physical address, attendee occupation, attendee employer details, details of attendee membership in any occupation-related organization, occupation-related registrations or licenses held by the attendee, number of ongoing education credits attendee holds, number of ongoing education credit attendee requires in order to satisfy an ongoing education requirement, date by which attendee must attain the minimum number of ongoing education credits, education sessions booked by attendee, education sessions attended by attendee, credit card information, and the like.

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As used herein, the term “potential attendee” includes an agent of a potential attendee such as a personnel assistant, secretary, subordinate, training officer, or a human resources officer.

30

The term "database" as used herein is not intended to be limited to a database holding any minimal number of entries. Indeed, the database may hold only a single entry, or may hold a very large number of entries. For example where the first entry is a provider of a single ongoing education session the first entity database will hold information only that session  
5 only. According to the present methods, information on that single session is transferred to the second entity database where it resides along with information relating to a number of other ongoing education sessions.

Typically, databases useful in the context of the present method and systems are electronic  
10 databases physically embodied in the form of a digital storage medium such as a magnetic or optical medium. The database may be any type of database that is capable of being read from and written to. Typical options include the flat-file style of database useful for smaller amounts of data that need to be human readable or edited by hand. Preferably a Database Management Layer is added to this type of database allowing script programmers to store  
15 information as a pair of strings whereby a key is used to find the associated value. More complex data structures will be better managed using relational databases such as MySQL, Microsoft SQL Server and Oracle, given their more logical structure in the way data is stored.

Where the first entity is a professional association for example, the first database may hold  
20 entries relating to a large number of ongoing education sessions. This information may have been provided to the first entity by several or many ongoing education providers. In certain forms of the method, the first entity database holds information relating to at least 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, 70, 75, 80, 85, 90, 95 or 100 ongoing education sessions.

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It will be understood that in the role of collector and communicator, the database of the second entity may hold information relating to a very large number of ongoing education sessions. In preferred embodiments, the second entity database holds information relating to at least 100, 150, 200, 250, 300, 350, 400, 450, 500, 550, 600, 650, 700, 750, 800, 850,  
30 900 or 1000 ongoing education sessions.

In their broadest forms, the present methods and systems are not restricted to the use of databases having any upper or lower number of entries. However, typically the second entity database holding information relating a multiple number of ongoing education sessions as compared with the first entity database. Certain embodiments provide for a multiple of 2, 3, 4, 5, 6, 7, 8, 9, 10, 15, 20, 25, 30, 35, 40, 45, 50, 100, 150, 200, 250, 500 or 1000.

Typically, the present methods are computer-implemented. As used herein, the term "computer-implemented" is intended to mean that the method is operable at least in part or even entirely on any processor-equipped device such as a personal computer, computer server, laptop, netbook, tablet, PDA, smart phone or other similar contrivance. The methods may be implemented on a single computer but more typically implemented across multiple computers connected to a LAN, WAN or the Internet.

According to the present methods, the potential attendee has previously registered an interest in ongoing education with the second entity. The registration may be accomplished by the potential attendee themselves by communicating directly with the second entity, or by the potential attendee communicating indirectly via the second entity, or via a third entity. Typically, the registration is effected by the completion and submission of a data form residing on an internet website that is owned, administered or controlled by the first or second entity.

In preferred embodiments, the registration process obtains information related to one or more of the following: attendee name, attendee email address, attendee physical address, attendee occupation, attendee employer details, details of attendee membership in any occupation-related organization, occupation-related registrations or licenses held by the attendee, number of ongoing education credits attendee holds, number of ongoing education credit attendee requires in order to satisfy an ongoing education requirement, date by which attendee must attain the minimum number of ongoing education credits, education sessions booked by attendee, education sessions attended by attendee, credit card information and the like.

The availability of such information is advantageous to the second entity since it allows for the selection of appropriate future ongoing education sessions having regard to the characteristics of the potential attendee. For example, the potential attendee may inform the second entity that he is a lawyer in Chicago, requiring 2 points in legal ethics to be  
5 obtained by 30 June 2012. In that circumstance, the second entity will notify the potential attendee of only those sessions within the relevant geographical area, acceptable to the Illinois bar, directed to legal ethics, and that are scheduled for anytime before 30 June.

Sessions of potential interest may be forwarded to the potential attendee by “push”  
10 notification via an application, an email, an SMS text message, a postage item, a telephone call, and the like. Alternatively, the potential attendee may actively retrieve details of relevant future sessions by logging in to a website hosted by the second entity.

In some embodiments, the potential attendee is otherwise known to the second entity in  
15 which case registration may not be required. By way of example, the first entity (or indeed any other entity) may forward information relating to a potential attendee to the second entity. This information may in some embodiments of the methods and systems be information which is obtainable via the registration process as described *supra*.

20 In preferred embodiments, the method comprises the further step of transferring information relating to one or more future ongoing information sessions to the potential attendee. This communication is most conveniently achieved by electronic means, and may be forwarded by way of a push notification to a dedicated application residing on a smart phone, table or personal computer of the potential attendee.

25 Where the potential attendee wishes to attend an ongoing information session, the session may be booked by way of actuating an icon on the dedicated application. The application may also be capable of handling payment for the session and may also direct inclusion of the session on the attendee’s electronic calendar.

30 In the context of the present invention it will be apparent that the second entity database *per se* is unique by reference to the information contained therein, in addition to the various

connections achievable with other processor-based machines. Accordingly, in another aspect the present invention provides an electronic database comprising information relating to (i) a plurality of ongoing education sessions and (ii) a plurality of potential attendees. Preferably, the database comprises information relating to at least 100, 150, 5 200, 250, 300, 350, 400, 450, 500, 550, 600, 650, 700, 750, 800, 850, 900 or 1000 ongoing education sessions. Preferably, the database comprises information relating to at least 100, 200, 300, 400, 500, 600, 700, 800, 900, 1000, 2000, 3000, 40000, 5000, 6000, 7000, 8000, 9000, 10000, 15000, 20000, 30000, 40000, 50000, 60000, 70000, 80000, 90000, 100000, 200000, 300000, 400000, 500000, 600000, 700000, 800000, 900000 or 1000000 potential 10 attendees. In certain embodiments, the database is connected or capable of being connected to a database or processor-based machine owned, controlled or administered by (i) the first entity or (ii) the potential attendee.

In addition to facilitating presentation of ongoing education opportunities to potential attendees the present methods, systems and applications provide, in some embodiments, 15 means for recording attendance at an ongoing education session. The means may rely on the use of a dedicated application residing on a portable processor-based machine such as a smart phone, tablet, netbook, notebook or laptop computer of the potential attendee. The dedicated application may include means for capturing an optical code containing 20 information relating to the ongoing education session. Upon presentation at (or completion of) the session, the attendee is provided with an optical code for capture by their portable processor-based machine.

The optical code may be plain text (readable by an optical character recognition method), or 25 a bar code, or a QR (Quick Response) code. The code may comprise only a simple unique identification string for the particular ongoing education session, or may comprise more complete details such as any of date, venue, topic, presenter, duration, credits claimable, cost and the like.

30 Preferably, the optical code provides a validation code that could not be known or predicted by the potential attendee before attendance at the ongoing education session. In a

preferred form of the method, the optical code is devised by the second entity and provided to the ongoing education provider for display at the session.

5 The optical code may be presented on the cover of course notes, on a certificate of completion, as a projected image during a slide or video presentation, or be mounted to a notice board or a door within the venue.

10 Upon capture of the optical code, the dedicated application transfers the information contained therein to the second entity where it is validated. Alternatively, the code may be validated "on board" by the portable processor based machine, with successful validation being communicated to the second entity. By that method, the second entity is capable is tracking the number of ongoing education credits held by the attendee.

15 In some embodiments the method comprises the further step of transferring information relating to attendance as captured by the portable processor-based machine to any other individual or organization. This step of transferring may be initiated by the dedicated application that captured the optical code, or by the second entity. Advantageously, the attendance information may be transferred to a professional association or a statutory body charged with overseeing a registration regime. In this way, the attendee may not be  
20 required to retain any diary or proof of attendance at an ongoing education session since that information (and preferably validated information) is already held by the relevant body.

25 In light of the above, it will be appreciated that the dedicated application is unique by virtue of one or more functions. Accordingly, a further aspect of the present invention provides an application for execution on a portable processor-based machine comprising a set of executable instructions providing for one or more of the following functions:

- (i) notifying a user of a future ongoing education session (optionally based on their preferences),
- 30 (ii) allowing the user to access more detailed information on a future ongoing education session,
- (iii) allowing a user to book a future ongoing information session,

- (iv) allowing a user to pay for a future ongoing education session,
- (v) directing information relating to a future ongoing information session to be saved in an electronic calendar,
- (vi) capturing an optical code containing information (and optionally validation information) relating to an ongoing education session,
- (vii) transferring information (and optionally validation information) relating to an ongoing education session to a remote electronic database.

The dedicated application may comprise instructions for any 1, 2, 3, 4, 5, 6 or 7 of the functions (i) to (vii). It is to be further understood that the application may comprise instructions for any number of functions (i) to (vii) and in any of the 7! combinations available.

The application may include functionality allowing a user to search across all content, or just a subset thereof.

Where the application is executable on a device having a GPS function (such as a tablet or a smartphone), only ongoing education sessions in the immediate geographical area may be presented.

Furthermore, the application may be configurable to report their booking and/or attendance at an ongoing education session directly to one or more occupational associations.

When availed with details of the present invention as disclosed herein, the skilled artisan is capable by the implementation of no more than routine means to author code for a dedicated application having one or more of the functions described at (i) to (vii) *supra*. The code may be authored for execution on an android, iOS or Blackberry operating system.

In preferred embodiments, the dedicated application allows a user to track, record and automatically report ongoing education activity undertaken by simply scanning the optical code with their Smart Phone. The user may also view and email an up to the minute

collated ongoing education report. This report may be made automatically available to the chosen professional association and/or employer of the professional and/or statutory body overseeing the ongoing education regime.

- 5 The application may also allow the user to login to a second entity website for more detailed reporting, preference modification and manual input of data if required.

The dedicated application may further allow the user to search or select their preference and receive alerts of relevant ongoing education opportunities provided through their occupational association or from all providers of ongoing education and content registered with the second entity.

The dedicated application may be branded by an occupational association such that a user is not immediately aware of the involvement of the second entity. Ongoing education providers may pay a fee to the association in order to have their content presented to a user of the application.

In certain forms, the present dedicated applications allow ongoing education providers to promote their offerings by take advantage of the network of professionals who make use of the convenience of application functionality, including easy tracking of credits through the optical code system.

Providers are also not required to invest in setting up their own application-driven marketing, booking and payment system, instead taking advantage of that established by the second entity.

In one embodiment, the ongoing education provider reimburses the second entity by a “click through” model, and therefore only pay where a user seeks further information on a future session.

30

In the context of the dedicated application, the ongoing education session may be any of the public type already mentioned (such as seminars and workshops), but may also be a

private ongoing education session. For example, ongoing education credits may be obtained by the private study of relevant materials such as newspapers, periodicals, scientific journals, recorded video presentations and the like. In these circumstances, such materials may be published with optical codes. The codes may include indicia or text to indicate to an individual that it is acceptable for ongoing education credits. For example, a news paper article on proposed taxation reform has a QR code with the logo of CPA, or a logo associated with a ongoing education coordination entity (such as the second entity described *supra*). The optical code may provide a link to an entity (such as the second entity described *supra*) to facilitate registration with such an entity.

10

The optical code may be accompanied by text explaining to the reader that ongoing education credit can be obtained, and how many credits are available, and for what bodies.

A further aspect of the present invention provides for a text-based or video-based study material comprising an optical code, wherein the optical code comprises information relating to ongoing education. As mentioned *supra*, optical codes may facilitate the identification of acceptable content, and to also assist in the tracking of credits earned. In this context, a QR code is preferred because of the relatively large amount of information that may be encoded. For example, the title and date of the publication, page number, author, general technical area of the content, number of words, or duration of video content may be encoded. Preferably, the information encoded is decipherable exclusively by the second entity such that only users registered with the second entity can make use of the code and the attendant tracking advantages.

The optical code may be placed at any convenient place on a text-based document, but is preferably positioned in a conspicuous area (such as the top, left hand corner) in order to draw the attention of a reader. The code may be accompanied by text explaining that the function of the code is to assist readers to obtain and track ongoing education credits, optionally for certain professional organizations.

30

In a further aspect, the present invention provides a system for facilitating occupation-related education, the system comprising (i) an electronic database comprising information

relating to (a) a plurality of ongoing education sessions and (b) a plurality of potential attendees, and (ii) a portable processor-based machine having an application for execution on the portable processor-based machine comprising a set of executable instructions providing for one or more of the following functions:

5

(a) notifying a user of a future ongoing education session,

(b) allowing the user to access more detailed information on a future ongoing education session,

(c) allowing a user to book a future ongoing information session,

10

(d) allowing a user to pay for a future ongoing education session,

(e) directing information relating to a future ongoing information session to be saved in an electronic calendar,

(f) capturing an optical code containing information (and optionally validation information) relating to an ongoing education session,

15

(g) transferring information (and optionally validation information) relating to an ongoing education session to a remote electronic database.

In one embodiment, the system further comprises an optical code encoding information relating to an ongoing education session, or a text or video-based material.

20

With reference to the features of the systems, any alternative embodiments discussed with reference to any of the same or similar features described elsewhere herein are applicable to the systems.

25

The present invention will be more fully described by reference to following non-limiting example.

**EXAMPLE 1: Smart phone-based system for receiving notifications on future ongoing education session and recording of attendance with optical code.**

30

Reference is made to Figure 1 herein, whereby the potential attendee (a smart phone user) 2, has registered an interest in attending ongoing education sessions with an ongoing

education coordinating entity **4** of the type referred to elsewhere herein to as the “second entity”. The user has also downloaded a dedicated application into a smart phone**6**, the application being functionally linked to the coordinating entity **4**.

- 5 The user enters **8** preferences for the type of ongoing education sessions for which they have an interest or need into either the app **6** or the coordinating entity website **10** during the registration process. Preferences according to location of session, price, duration, number of credits etc are selectable by the user. User and preference information is held in a database **12** of the coordinating entity **4**.

10

Information relating to future ongoing education sessions is transferred to the database **12** by a number of content providers and occupational associations **14** of the type referred to elsewhere herein as the “first entity”. The transfer is effected from information held in a database **16** which is achieved electronically **18**, via interfaces **20** and **22**.

15

Information relating to future ongoing education sessions (filtered according to user preferences) is pushed **24** from the database **12** to the dedicated application on the smart phone **6**. The user **2** considers the sessions and elects to view further information on a particular session. This action triggers a “click through” **36**. Information is captured by the  
20 click server **28** (an independent click tracking server) and the user is redirected to the first entity site to allow the user **2** to buy a seat at the event. The click through is billed as a marketing charge payable by the content providers or occupational associations **14**.

25

The coordinating entity **4** generates a QR code **41** specific for the CPD event, and transfers electronically **18** to **14** via the interface **22** to **20**. The education provider **14** then displays the code **26** at the training venue, in delegate communications, certificates, magazines, technical papers, videos etc.

30

Upon attendance at the CPD event, the user **2** scans the QR code **26** using their smart phone **6** to capture the QR code information **29**. The dedicated application on the smart phone **6** triggers transfer **24** of the QR code information to the database **12**. Confirmation of scan success is also sent back to smart phone app **6**. User **2** activity is then communicated back

to the association/s **14** for CPD reporting and compliance via **18** and also available manually via **46**.

5 Education providers or occupational associations can log in to the coordinating entity website **10** in order to forward **38** information on future education sessions for inclusion on the database **12**. The providers and association are also enabled to retrieve information **30** from the coordinating entity administration **46** for the purposes of tracking activity across their content by users of the dedicated application.

10 A click through marketing charge is also applied for clicks going to content provider's CPD events via the second entity web site in the same way as described for the application.

Those of skill in the art will readily appreciate that the various embodiments disclosed herein may be implemented as electronic hardware, computer software, or combinations of  
15 both. To clearly illustrate this interchangeability of hardware and software, various illustrative components and steps of the method have been described above generally in terms of their functionality. Whether such functionality is implemented as hardware or software depends upon the particular application and design constraints imposed on the overall system. Skilled persons can implement the described functionality in varying ways  
20 for each particular application, but such implementation decisions should not be interpreted as causing a departure from the scope of the invention. In addition, the grouping of functions is for ease of description.

The various embodiments disclosed herein may be implemented or performed with a  
25 general purpose processor, a digital signal processor (DSP), an application specific integrated circuit (ASIC), a field programmable gate array (FPGA) or other programmable logic device, discrete gate or transistor logic, discrete hardware components, or any combination thereof designed to perform the functions described herein. A general-purpose processor can be a microprocessor, but in the alternative, the processor can be any  
30 processor, controller, microcontroller, or state machine. A processor can also be implemented as a combination of computing devices, for example, a combination of a DSP

and a microprocessor, a plurality of microprocessors, one or more microprocessors in conjunction with a DSP core, or any other such configuration.

5 The steps of any method described herein can be embodied directly in hardware, in a software module executed by a processor, or in a combination of the two. A software module can reside in RAM memory, flash memory, ROM memory, EPROM memory, EEPROM memory, registers, hard disk, a removable disk, a CD-ROM, or any other form of storage medium. An exemplary storage medium can be coupled to the processor such that the processor can read information from, and write information to, the storage medium. In  
10 the alternative, the storage medium can be integral to the processor. The processor and the storage medium can reside in an ASIC.

Various embodiments may also be implemented primarily in hardware using, for example, components such as application specific integrated circuits ("ASICs"), or field programmable  
15 gate arrays ("FPGAs"). Implementation of a hardware state machine capable of performing the functions described herein will also be apparent to those skilled in the relevant art. Various embodiments may also be implemented using a combination of both hardware and software.

20 The above description of the disclosed embodiments is provided to enable any person skilled in the art to make or use the invention. Various modifications to these embodiments will be readily apparent to those skilled in the art, and the generic principles described herein can be applied to other embodiments without departing from the spirit or scope of the invention. Thus, it is to be understood that the description and drawings presented  
25 herein represent a presently preferred embodiment of the invention and are therefore representative of the subject matter which is broadly contemplated by the present invention. It is further understood that the scope of the present invention fully encompasses other embodiments that may become obvious to those skilled in the art.

30

## CLAIMS

1. A method for facilitating occupation-related education, the method comprising the step of: transferring information relating to a future ongoing education session between (i)  
5 a database owned, administered or controlled by a first entity and (ii) a database owned, administered or controlled by a second entity, wherein the first entity is a provider or a promoter of the future ongoing education session, and the second entity is a communicator of the future ongoing education session to a potential attendee; and wherein the potential attendee is registered with or otherwise known to the second entity.
- 10 2. A method according to claim 1 wherein the first entity is an occupation-related association, or an industry-related organization, or a statutory body charged with overseeing the ongoing education of an occupation.
3. A method according to claim 2 wherein the occupation-related organization is a professional association.
- 15 4. A method according to any one of claims 1 to 3 wherein the second entity is not an occupation-related association or an industry-related association, or a provider of an ongoing education session.
5. A method according to any one of claims 1 to 4 wherein the first entity database holds information relating to at least 5, 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, 70, 75,  
20 80, 85, 90, 95 or 100 ongoing education sessions.
6. A method according to any one of claims 1 to 5 wherein the second entity database holds information relating to at least 100, 150, 200, 250, 300, 350, 400, 450, 500, 550, 600, 650, 700, 750, 800, 850, 900 or 1000 ongoing education sessions.
7. A method according to any one of claims 1 to 6 wherein the method is a computer-  
25 implemented method.
8. A method according to any one of claims 1 to 7 further comprising the further step of transferring information relating to one or more future ongoing information sessions to the potential attendee.

9. An electronic database comprising information relating to (i) a plurality of ongoing education sessions and (ii) a plurality of potential attendees.
10. A database according to claim 9 comprising information relating to at least 100, 150, 200, 250, 300, 350, 400, 450, 500, 550, 600, 650, 700, 750, 800, 850, 900 or 1000 ongoing education sessions.
11. A database according to claim 9 or claim 10 comprising information relating to at least 100, 200, 300, 400, 500, 600, 700, 800, 900, 1000, 2000, 3000, 40000, 5000, 6000, 7000, 8000, 9000, 10000, 15000, 20000, 30000, 40000, 50000, 60000, 70000, 80000, 90000, 100000, 200000, 300000, 400000, 500000, 600000, 700000, 800000, 900000 or 1000000 potential attendees.
12. A method according to any one of claims 1 to 10 comprising use of means for recording attendance at an ongoing education session.
13. A method according to claim 12 wherein of the means for recording attendance at an ongoing education session is an optical code readable by a dedicated application residing on a portable processor-based machine of the potential attendee.
14. A method according to claim 12 or claim 13 wherein the optical code is a QR code.
15. A method according to any one of claims 12 to 14 wherein the optical code provides a validation code.
16. A method according to any one of claims 13 to 15 comprising the further step of transferring information relating to attendance as captured by the portable processor-based machine to any other individual or organization.
17. An application for execution on a portable processor-based machine comprising a set of executable instructions providing for one or more of the following functions:
- (i) notifying a user of a future ongoing education session,
  - (ii) allowing the user to access more detailed information on a future ongoing education session,
  - (iii) allowing a user to book a future ongoing information session,

- (iv) allowing a user to pay for a future ongoing education session,
- (v) directing information relating to a future ongoing information session to be saved in an electronic calendar,
- (vi) capturing an optical code containing information (and optionally validation information) relating to an ongoing education session,
- (vii) transferring information (and optionally validation information) relating to an ongoing education session to a remote electronic database.

18. A text-based or video-based study material comprising an optical code, wherein the optical code comprises information relating to ongoing education.

19. A system for facilitating occupation-related education, the system comprising (i) an electronic database comprising information relating to (a) a plurality of ongoing education sessions and (b) a plurality of potential attendees, and (ii) a portable processor-based machine having an application for execution on the portable processor-based machine comprising a set of executable instructions providing for one or more of the following functions:

- (a) notifying a user of a future ongoing education session
- (b) allowing the user to access more detailed information on a future ongoing education session
- (c) allowing a user to book a future ongoing information session.
- (d) allowing a user to pay for a future ongoing education session
- (e) directing information relating to a future ongoing information session to be saved in an electronic calendar
- (f) capturing an optical code containing information (and optionally validation information) relating to an ongoing education session
- (g) transferring information (and optionally validation information) relating to an ongoing education session to a remote electronic database

20. A system according to claim 19 further comprising an optical code encoding information relating to an ongoing education session, or a text or video-based material.

5

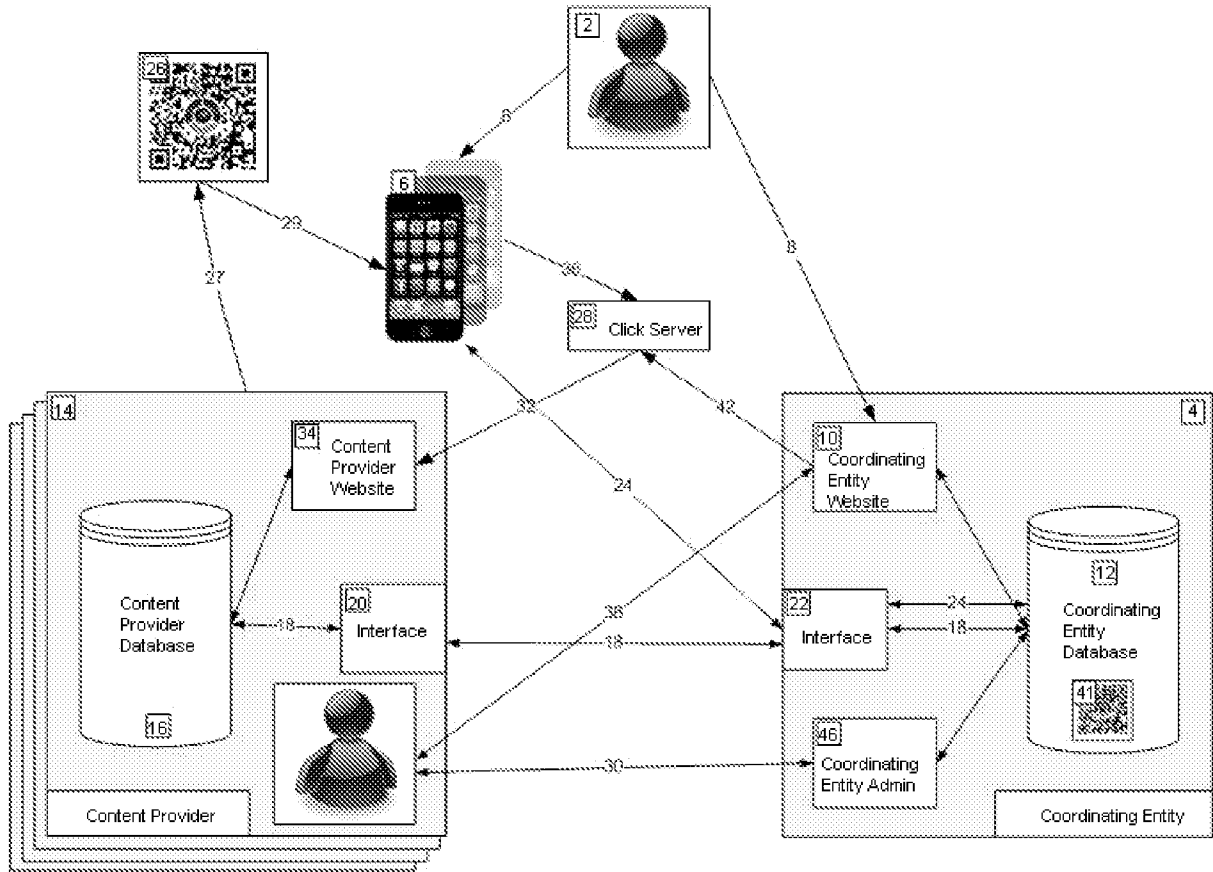


Fig. 1