CPD Manager

Staff Guide

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Getting Started

When you are set up as a user, you will automatically receive an email informing you of your **Username**, **Password** and the **Website Address**. If you don't have a login or don't know the web address contact your school's CPD co-ordinator or your Authority.

When you login you should change your password to something you will remember at the earliest opportunity. You can also change your username.

Changing Password

To change your password select **Change Password** from the menu. Your new password should be 6 alphabetic or/ and numeric characters and it **is** case sensitive. Enter details of your new username confirm it and then select **Change.**

Changing Username

To change your username select **Change Username** from the menu. The new username should be alphabetic or/and numeric characters and is **not** case sensitive. Enter details of your new username, confirm it and then select **Change.**

Validate Email

If you have changed your email, or lost your original validation email, you can get this resent. Simply click on the **Resend** button and you will get sent a validation email. Until you click on the link in this email you will not get any emails from the CPD system.

Security Question

If you wish to recover your password you will need to know the answer to your security question. You can set up and change your security question at any time.

Forgotten Username/Password

If you forget your password enter your **Username** and any **Password** into the boxes.

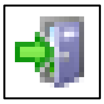
Click **Log In** > You will get an error message and a link to a **Forgotten Your Password?**
Click this link and you will be taken to a page where you can **recover** your password.
Enter your **Username** in the space provided and answer the security question> **Click Submit**
As long you validated your email, you will receive an email with your login details.

Gateway OnePass

CPD Manager uses Gateway's single sign on. This page will allow you to see what other sites your account is against and to combine your CPD Manager account with accounts for WorkIT or MerIT.

Deferral Request

How to make a Deferral Request



If it is your Professional Update Year, GTC Scotland recognises that there are circumstances which may make completion of the Professional Update process within the designed timescale difficult. You can therefore request a deferral for career breaks, extended illness, maternity / paternity or adoption leave, unemployment, engagement in only occasional and sporadic supply work, recent change in employment circumstances or other exceptional circumstances for which extensions to the 5 year sign-off period may be required.

Against a Plan that has not had the Record signed off a deferral request icon is available, select it if you would like to make a deferral request.

An information box appears which links to the **GTCS** guidance on the deferral process. Once you have read this information close this box.

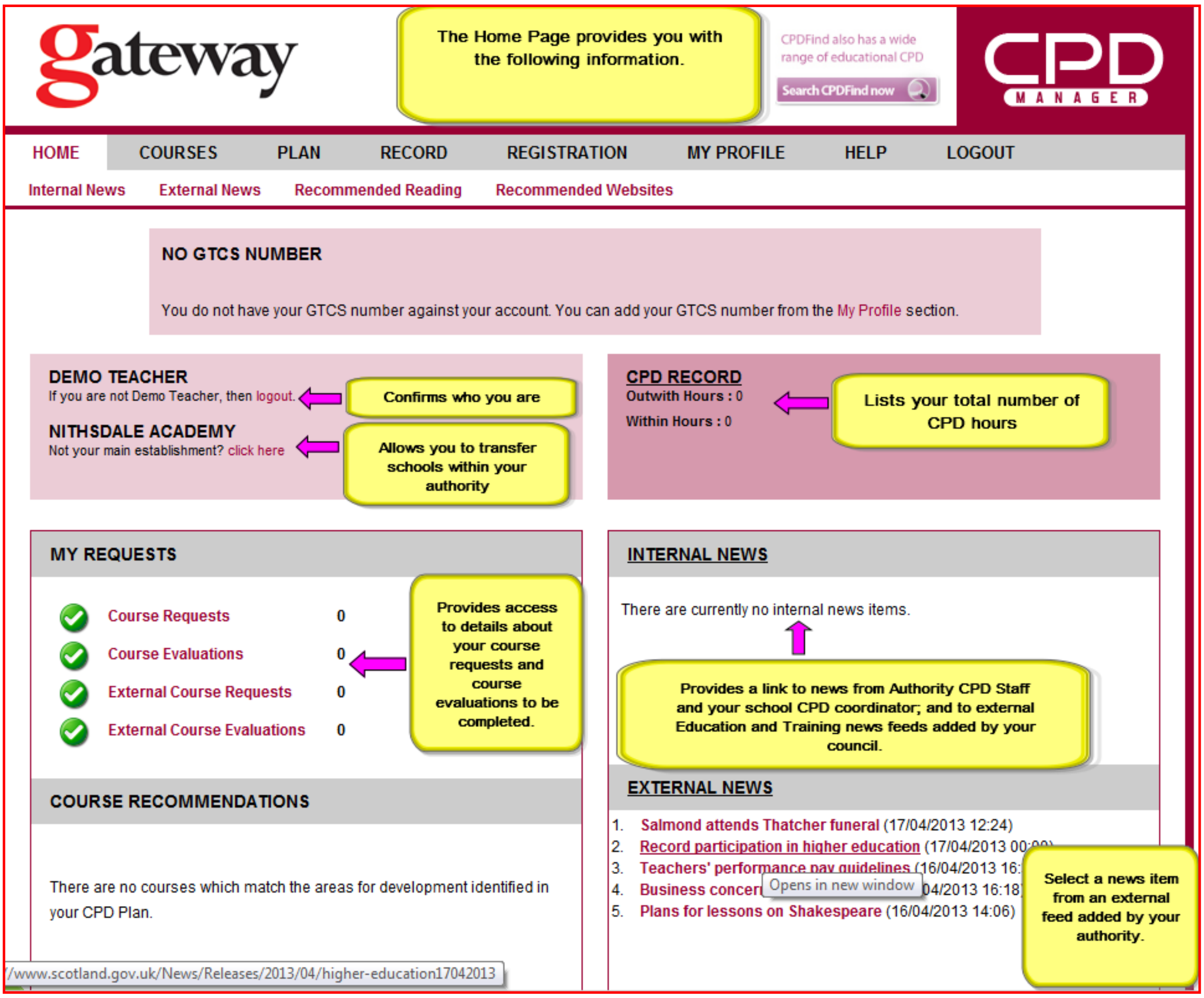
A page with your personal information is displayed > Select the **deferral reason** from the drop down menu.
Enter **reason details** in the textbox and click **Confirm** > A prompt box invites you to confirm that you want to **Submit** a deferral request.
Click **OK** if you want to proceed.

If the coordinator approves the request, an email is automatically sent to GTCS with the deferral details. You and your reviewer and will get alerts on the home page of the CPD site, outlining the outcome of your deferral request.

Homepage

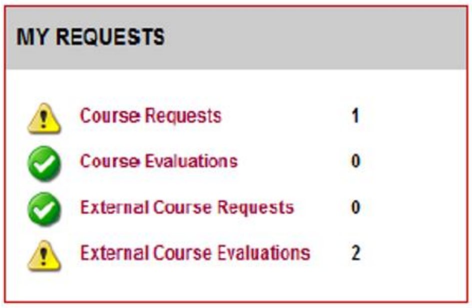
Log into CPD
Enter **Username** and **Password** > **Click Login**

CPD Homepage



My Requests

Select one of the section headings, Course Requests, Course Evaluations, or External Course Requests and External Course Evaluations, and you can check the status of your requests and evaluations.



When a triangle with an exclamation mark replaces a tick, the status of your course application or evaluation has changed and you should select this section to view the change.

Before you can apply for a course you must update your Equal Opportunities monitoring information in your Personal Profile

Updating Your Personal Profile

Click **My Profile** > Click **Update Profile**
Update the information you wish to change in Your Profile > Click **Update** to make changes to Your Profile.

A confirmation page appears to confirm your updated profile.

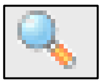
Course Search

Click **Courses**

Search the courses using the search fields. N.B. Please don't select all the search fields.

Click **Search** when you have selected which fields you want to use

You can reorder the results in ascending or descending order by selecting the **Heading ID, Reference, Start Date** or **Course Title.**

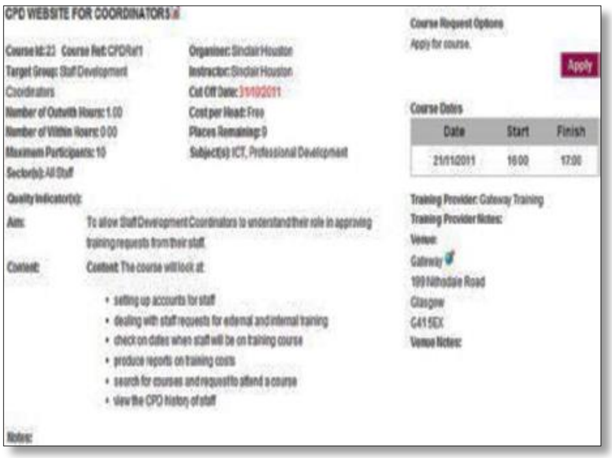
Click on the spyglass icon to view the course description. 

Searching and Applying for a Course

You can now search for which course you would like to apply for.

Click **Courses**
Select search criteria > Click **Search**
Select a course > Click **Apply** to register for this course
Check the box to confirm that you have discussed the application with your line Manager and if you work in more than one establishment you will be asked to select the establishment the request should go to > Click **Submit** Application.

A page confirms your application.



There may be relevant documents which can be downloaded from the course description. You can view the location of the venue by clicking on the map icon beside the venue name. If there are directions to the venue you will find a document on this page.

Select **Courses** from the menu bar, and then **History** and you will see the status of the course you have just applied for is pending. Your CPD coordinator will either approve or decline your application.
If approved, Authority CPD staff will then accept or decline your application for the course. You will be informed through the website of their decision so it is important to keep a regular check on your applications.

External Courses

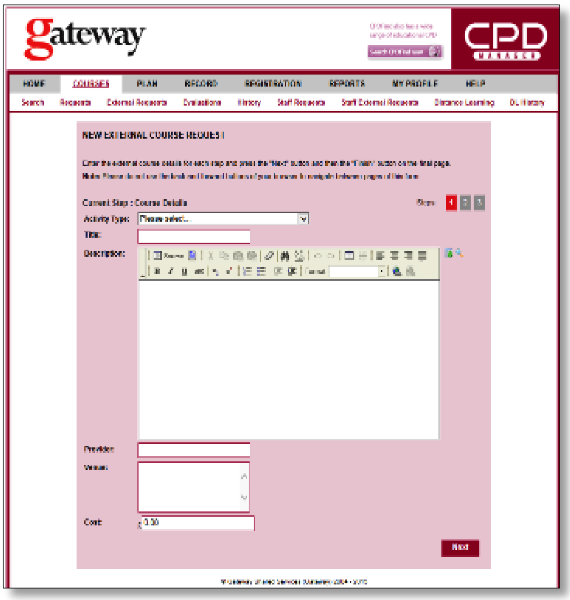
Entering Course Information is a three-step process.

Click **Courses** > Click External Requests > Click New External Course Request

Step 1 : Enter the relevant details about the course. Click **Next** when you have entered the course detail.

Step 2: Enter the date(s) and the time(s) of the course. Click **Add Date** when information has been added. Repeat this process if there is more than one date associated with the course. You can edit and remove dates if you make a mistake when entering them. Once you have added all the dates and times click **Next.**

Step 3: Enter the request details for the course. You will be asked to confirm that you have discussed this with your line manager. If you work in more than one establishment you will be asked to select the establishment the request should go to. One of the priorities should be selected for this request and then a reason should be entered.



Click **Finish** once all the information has been entered.

Confirmation that the new request has been entered successfully appears. This will now go to your coordinator for acceptance.

The summary page for external course requests provides you with information about the status of your requests.

You can withdraw your request for external course applications by clicking on the **red cross icon.** You will be asked for a reason why you are withdrawing your request. Your authority is not involved with external applications.

You can edit or view external courses by clicking on the relevant icon. Click **Finish** once you have made any changes.

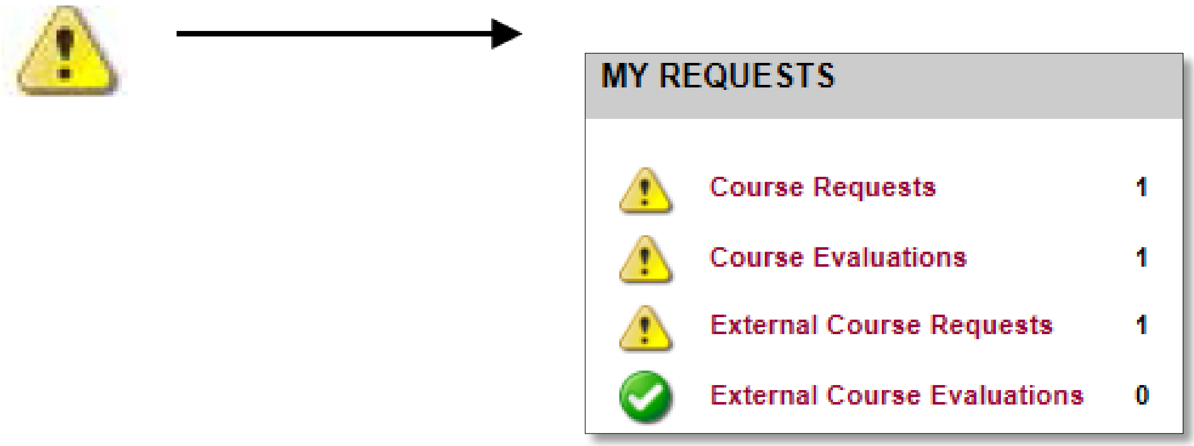
Evaluations

After you have attended a course, **Evaluations** automatically appear on the homepage of your CPD website.

Click **Course Evaluations** > All outstanding evaluations will be displayed
Select the course you wish to complete the evaluation for > Complete all sections of the Evaluation.

Your updated CPD Record will include this new entry.

The course evaluation link will remain on your homepage until you have completed all pending evaluations. Once you have completed them all the triangle on the home page reverts to the green tick icon.

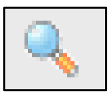


Distance Learning

If your Authority provides Distance Learning courses you can use the following search fields:

Category	Searches the distance learning database by category e.g. Presentation Skills
Application	Searches for the application or software
Level	Select from Absolute Beginner through to Proficient User.
Audience	Searches from a variety of groups the course is aimed at
Keyword	Searches for the word appearing in the course description or title.

NB: Don’t select all of the above fields at the same time. You can reorder search results in ascending or descending order by selecting the heading Course Reference, Application or Course Title.

Click on the view course details icon. 

This description provides you with complete details of the course, including copies of the study and resource files which can be downloaded.

An option to cancel the course is available on this page.

When you have completed the study material ***select*** the text **Mark as Complete** and a Distance Learning Evaluation is available to complete which adds to your CPD record. This also appears on the evaluations page.

Distance Learning History

A record of your Distance Learning courses and their status is listed here: **cancelled or completed.** To access course files again select the course title and select start or if you have already completed the course you can download the files from the bottom of the page.

Adding Your Plan

Enter **Username** and **Password** > Click **Login** > Click **Plan** > Click **Add New Plan**

Check your GTC details if necessary > **Check the Tick box** confirming that you have updated your GTC Scotland details and then > Click the blue cross to close the dialog box.

Creating a Plan is a two- step process.

Step 1
Select the Overview details of the plan, including the session it applies to, review dates, the name of your reviewer and your Current Professional Intentions. Select this information from pick lists.

NB: Head Teachers, please select your main reviewer not your peer reviewer.

Select **Session** from the drop down menu > choose your **Reviewer** from the pick list
Select the **Last Review Date** of your last PRD conversation > Select the date of your **Next** PRD conversation.

Develop within current post > select an option from the pick list > **Prepare for new post** > Select from pick list > Click **Next**.

Step 2
Entering a new plan-,this should be based on the PRD conversation you have had with your reviewer.
Title of Area for Development - type in this information > **Area for development** choose from the pick list.
Possible Types of Professional Learning – choose from the pick list. You can add more than one kind of professional learning that you wish to undertake.
Selections will appear automatically in the "**Selected Types of Professional Learning Box**".
Proposed Activities – use the pick list to choose activities. The number of activities to select from will increase if you have chosen more than one possible type of professional learning in the previous box.
If you selected Other Activities, provide details in the box below the proposed activities section.

Choose **Type of Development** > If relevant, select from **Quality Indicator Title** and then select indicators.

Click the **Add button** to save this Area for Development.
Repeat this process for each area of development agreed at your PRD conversation> Now click **Finish**

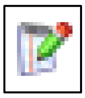
Adding Standards to Areas for Development

Once you have added an area for development to your plan you can add GTCS Standards against each area. The following option appears:

Click on **Add Standards for development**

Click here to view a full PDF version of the GTCS Standards.

Each Area for Development is listed and to insert or update the Standard select the edit icon from the right side of the screen.



This enables you to add/update Standards against each Area for Development. Select from options which appear

Click **Edit** to add/update standards against the Areas for development.
Select from options which appear in the pick lists.

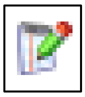
Some of the standards are quite long and to view the full details, hover the pointer over the Standard Value and the full description will appear in a tool tip.

Once you have completed your selections > click S**ubmit** linking this Standard to the Area for Development.

When you have added a number of areas to your plan you can access the Standard's against each area by Selecting **Plan** from the top right of the page.
Beside each area the **Add Standard's** icon is available and when selected it provides you with access to the Add/Update Standards section.

Editing Your Plan

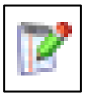
Click on the Edit icon to **Edit Plan** > Edit your plan from this page
Click **Next** once you have made the required changes > Click **Finish** once you have completed the changes.



You will get a confirmation that the Plan has been updated.

Plan Sign off for Reviewees

Click **Plan** > Select **Edit** Plan Icon



At the bottom of this page there is a section entitled "Plan Sign Off". Staff complete this section.

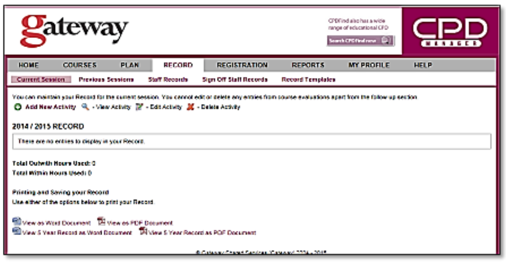
Complete the "**Date Signed Off"** section by selecting the date from the calendar.
Include the date of your next PRD conversation in the "**Next Review Date**" section.
You can enter a comment related to the Plan/PRD experience > click **Next**.

Click **Finish** to sign off your Plan.

Your Reviewer receives a copy of your Plan to be signed off.

Adding Your Record

In this section you can record, edit and delete the CPD activities which are not external or authority lead courses, for example research or project work. This provides you with an electronic copy of your CPD activities including a running record of the CPD hours you have completed towards the contractual requirement.



Click **Record Tab** to start this session's Record > Select **Add New Activity**

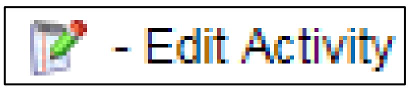
N.B. The Activity Template is only available if your School Co-ordinator has set one up. It can be used for courses delivered within school during an inset day for example, and it populates the fields for you.

Complete all fields and click **Next** to proceed > Complete the date(s) and time fields. Click **Add Date** (you may have multiple dates against the one activity and you can add them all here) > Click **Finish.**

A confirmation that you have added your record successfully appears.

Editing CPD Activity

You can edit and delete a CPD activity which you organised. Click the Record link the top of the screen and it should default to the **Current Session** > Select the **Edit** icon to edit an activity and the **Cross** icon to delete.



If you select the edit icon beside an activity and you will see that an additional **Follow Up** section is available.

Step 1: You can comment on the effect of the CPD activity, make the required changes and click **Next** to proceed to Step 2.

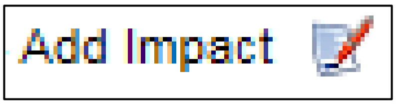
Step 2: This provides the option to add additional dates and times for this activity. If you have added additional dates click Add Date > then select **Finish** and the activity will be added to your CPD record.

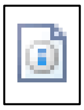
Select Current Session and you can save your CPD Record as a Word Document or PDF – links are available from the bottom left of the screen.

Adding Impact

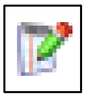
Towards the end of your PRD year, you can Add the Impact that your Areas of Development within your Plan have had on you and your work.

Click **Plan** > Click on **Add Impact Icon**



For each Area of Development listed click the Add Impact  icon that your professional learning activity has had.

Then select the Add/Edit Impact icon against the Area for Development that you wish to update.



Type the detail > **Click Submit**

You can also **Add the Impact** for **Non** Plan CPD

You can also access the Impact for Activities not in the original Plan for Development by selecting **Record.**

Click **Record** to sign this off, select **sign off record text**, complete the relevant fields and click **Sign Off.**

Record Sign Off (Reviewee/Staff)

Click **Record** > Click **Sign Off Record Text**
Click the **radio button** to confirm that you have completed the 35 hours CPD and you can add relevant comments on the text box provided. Insert the date you signed off the Record.

You will have met with your Line Manager and agreed the **Record Sign Off** before you complete details of this.

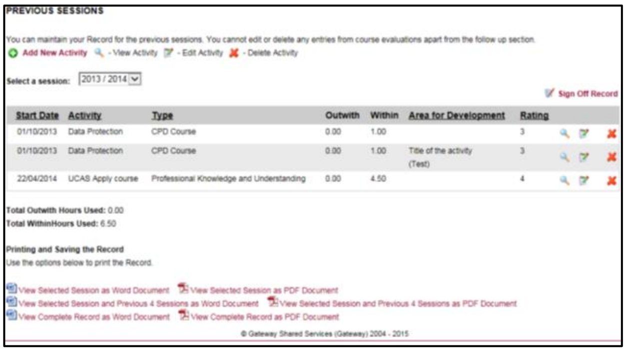
There are two fields asking you to indicate the first/previous General Teaching Council Scotland (GTCS) update and one to indicate the date of your next GTCS update. There will be a five-year gap between these dates. GTCS will inform you of these dates.

Select **Yes** if this is your Professional Update Year > **Check** this box to give permission for your Local Authority to share your data with GTCS.
Then **Check** the box to confirm that you have engaged in on-going Professional Development maintained in a CPD Record and portfolio of evidence and discussed the impact of your professional learning with your line manager. Click S**ign Off.**

A page will now be displayed to confirm that your Record has been signed off. This confirmation will be sent automatically to GTCS once your reviewer has signed off your Record.

Previous Sessions

In this section you can record, edit and delete the CPD Activities from the previous sessions. You will be able to view the activities for a particular session by selecting it from the dropdown.
You can generate a word or PDF document of the selected session or you can create a complete record document which will include all CPD activities you have entered this session and the previous four.



Teaching Registrations

GTC and STC for teaching staff is available but may not be used by your council or is relevant for you.

Current Session

Click **Registration** tab at the top of the page. In this section you can record your teacher registration evidence for the current session (all 5 Registrations are available). You can edit, delete and view the entries as well as add new evidence. You can view example documents for each of the registration types by selecting the type from the drop down at the top of the page and selecting the text **View Examples**, beside the Word icon.

To add evidence, Click on **Add New Evidence**.

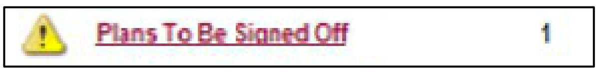
The drop downs which are read only will become available as you select the values in the drop downs above. If you select a standard that you have entered evidence for in a previous session the evidence will be displayed so you can edit it. Once you have selected a standard you will be able to see some exemplars by clicking on the arrows at the right hand side.

You can generate a document containing your registration evidence. This can be for the current session or a combined document of the current session and the previous two sessions. This option will use the most recent entry for each standard to produce the document.

If you are a member of staff but also a reviewer here is an outline on how to:

Sign off a Staff Plan as a Reviewer

Enter your Username and Password > Click Login
Once the reviewee has completed the plan sign off, a yellow triangle will appear on your homepage



under Plans to be Signed Off.

Click on **Plans to be Signed Off**

You can check that the plan is an accurate reflection of your PRD conversation with the reviewee – this can be done through the **“view plan details”** icon or you can open it as a word document.
Click on the **Sign off Staff Plan icon** > 

The reviewer can add comments in the box and use the calendar to record the sign off date.
Click **Sign Off** > A page will now display confirming that the plan has been signed off.

Signing Off Staff Record (Reviewer)

Click on Records to be Signed Off and any staff records requiring to be signed off will be displayed.

The record will have been discussed along with the impact of activities, during the PRD conversation.

Click on **Record Sign Off icon**> Information from the reviewee will appear. 

You can add a comment > Check the **Yes** box and select the sign off date from the calendar.
Click **Sign Off**.

A page will now be displayed confirming that the staff members record has been signed off successfully.