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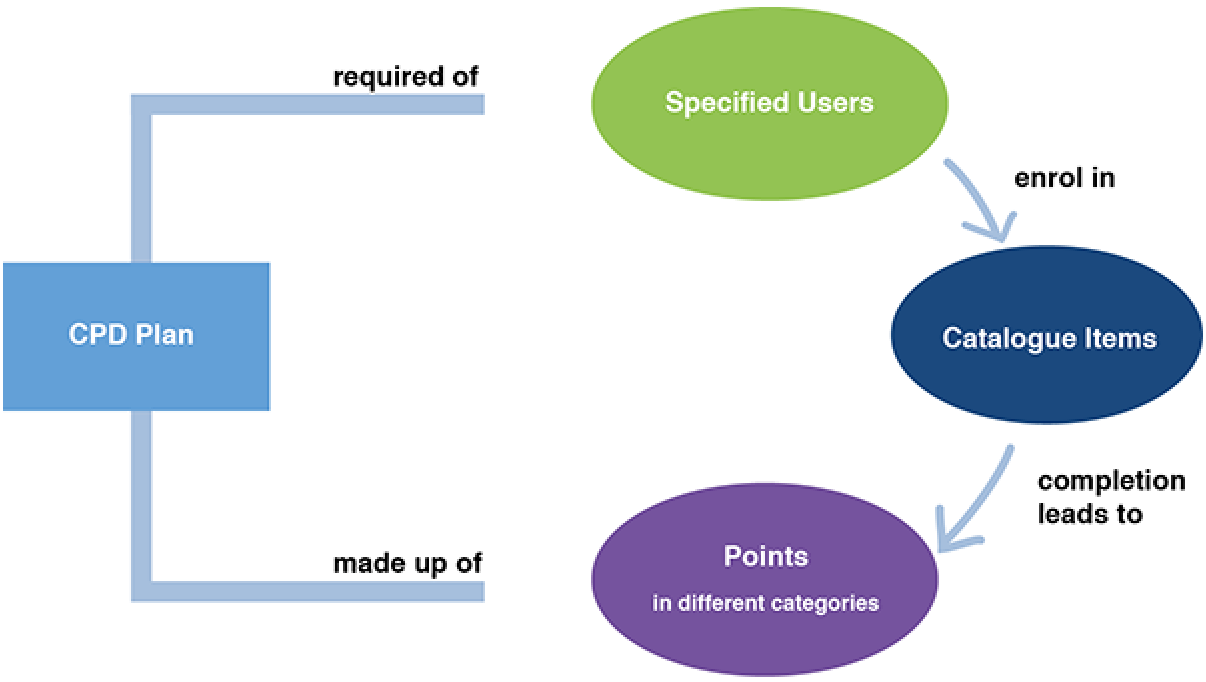
Continuing Professional Development - Introduction

Continuing Professional Development (CPD) is a system by which professionals update or refresh their knowledge and skills to maintain competence to practice. For example it is necessary for paramedics to meet training requirements aligned to developments in pre-hospital care. Law practitioners are also required to undertake training each year to maintain their practising certificate. CPD can involve any relevant learning activity, whether formal and structured or informal and self-directed. An important concept of CPD is that the participant achieves their qualification outside of the CPD plan. The goal of the CPD plan is to ensure that they maintain their compliance by continuously undertaking training.

How does CPD work in the CLS?

The CLS can successfully track, maintain and report on a user's CPD progress.

- Users are linked to a CPD Plan. The Plan specifies the required points the user need to achieve to meet the requirement to become compliant.
- Points are assigned to Catalogue Items and when each Catalogue Item is completed by the user the linked Points are achieved by the user.
- Once all the points in the Plan have been achieved the user becomes compliant.



The CPD feature has several dependencies that need to be setup prior to allocating or undergoing CPD:

- Tags are used to name the Points. An example of a **Tag** for a paramedic CPD point is **Clinical**.
- CPD plans are made up of sets of requirements and are linked to users to make them aware of what they need to do to become compliant. CPD plans are covered in more detail further down but if you would like to have a preview you will find the details here.
- Points are allocated to Tags in the CPD plan putting a name and number to requirements.
- Recognition of Prior Learning (RPL) should be enabled as points can be assigned to users if they are achieved outside of their current employment.

CPD Plan Colour Legend:

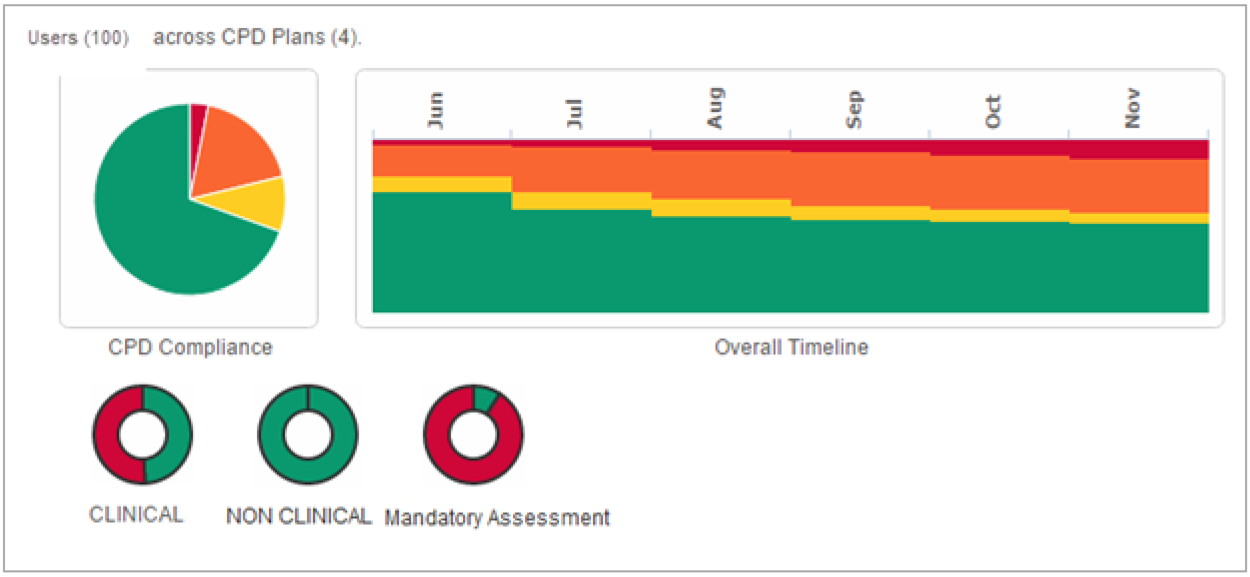
Throughout the CPD experience a colour code is used to visually display the users' compliance.

Green = Compliant

Yellow = Low Risk

Orange = High Risk

Red = Non-Compliant



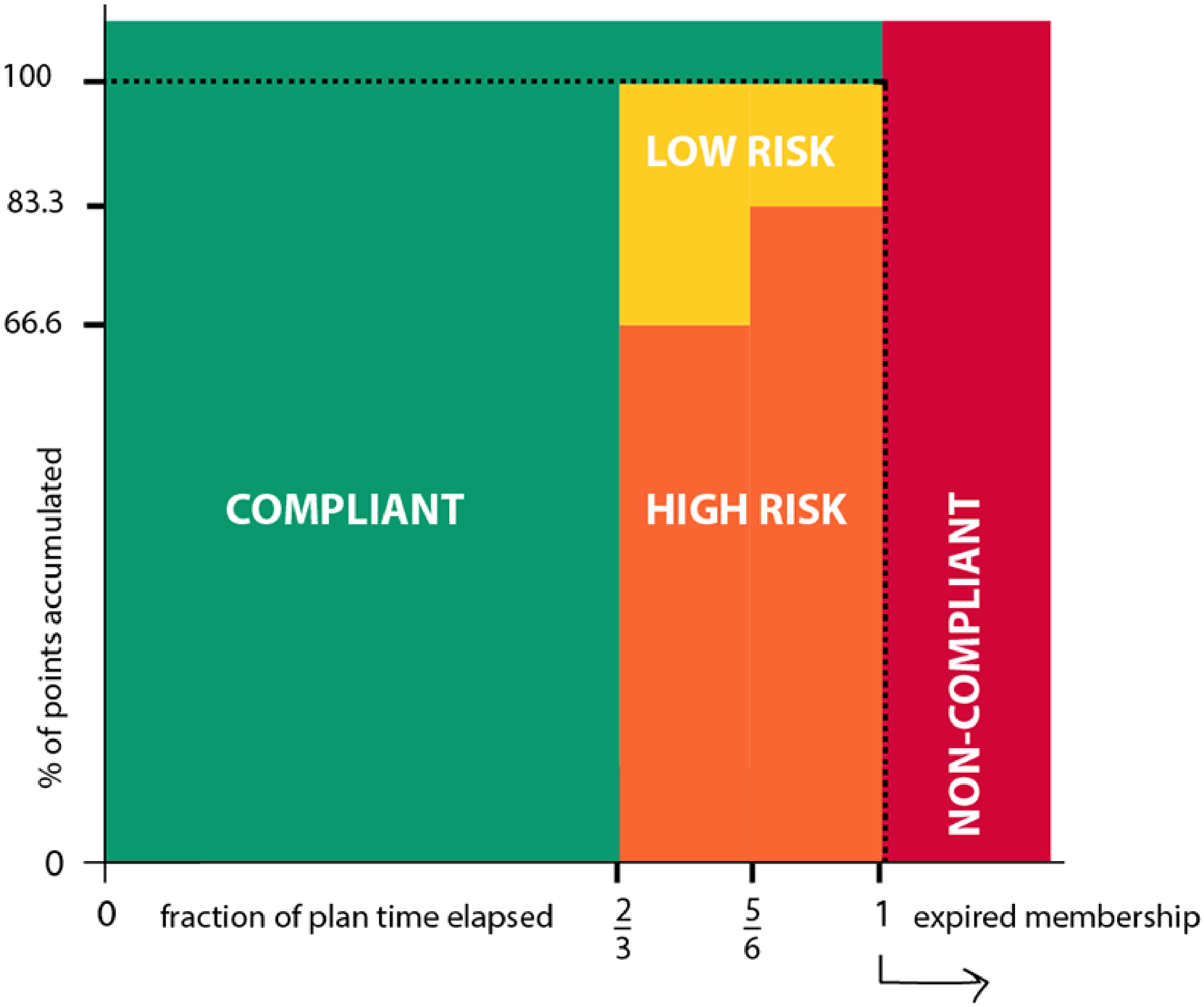
These are calculated using the following algorithm:

- For the first 2/3 of the plan, a user is compliant.
- For the last 1/3 the status algorithm below is applied:
  - If the user has a 1/3 to 1/6 of their plan to go and have accumulated less than 66.6% of their points then they are high risk, otherwise they are low risk.

    - If the user has less than 1/6 of their plan to go and have accumulated less than 83.3% of their points then they are high risk, otherwise they are low risk.
    - If the user has achieved all the required points, they are compliant.

- If the user's membership has expired, they are non-compliant.

For a visualisation of the Compliance calculations please see the diagram below.



CPD Points

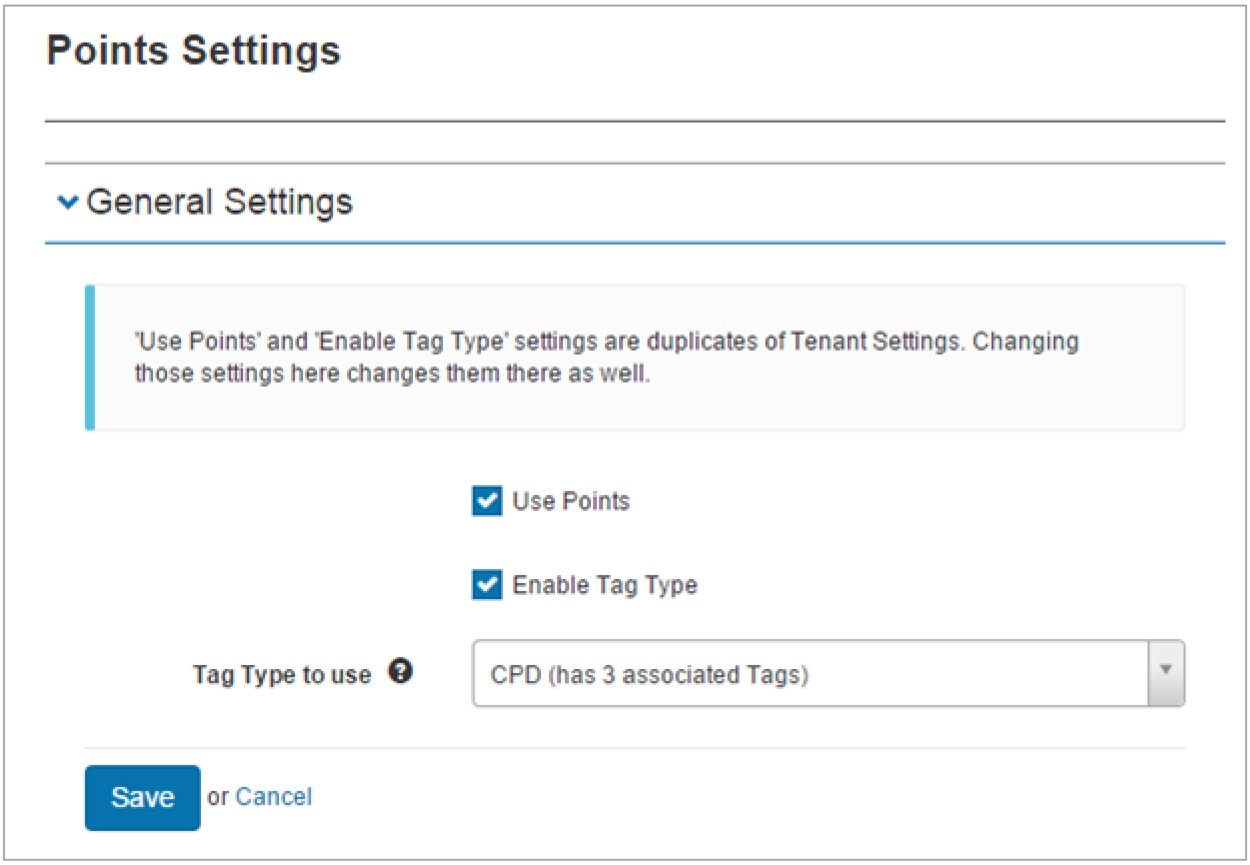
Points are numeric values used to set and achieve CPD requirements. Points are used in two places:

- The CPD Plan which sets the number of Points required for the User to be compliant.
- Points are assigned to Catalogues to give them values towards meeting the Plan requirements.

When a User completes the required Catalogue Items the Points are matched to the CPD Plan linked to the User and when all the Points in the Plan are achieved the Users become compliant.

To enable Points

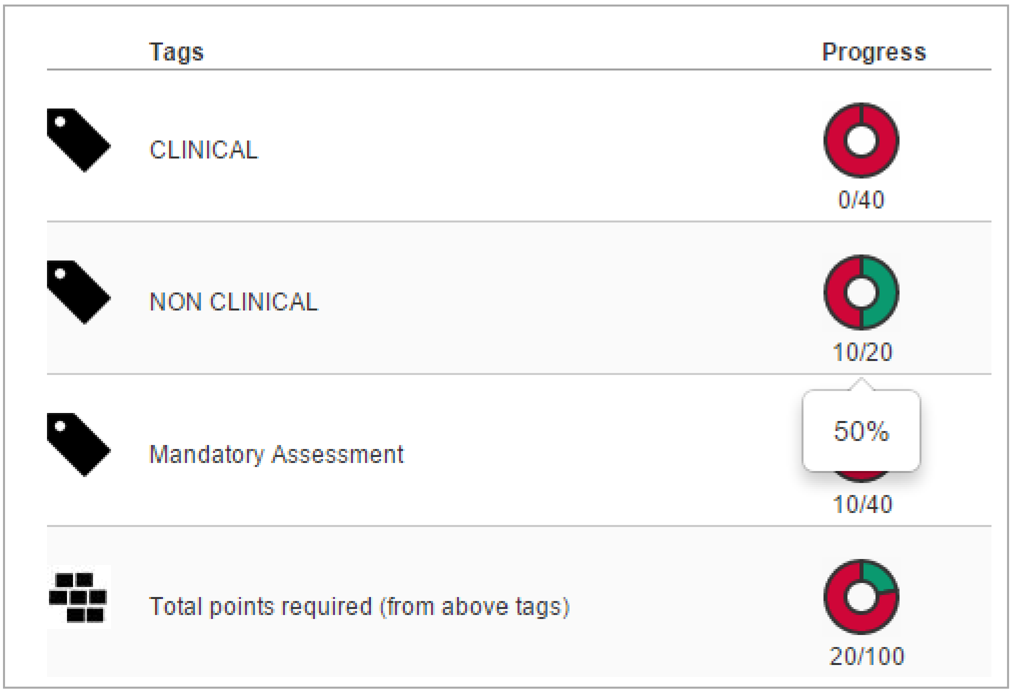
- Select **Settings** > **Points Settings**
- Check the '**Use Points**' tick-box.
- Check the '**Enable Tag Type**' tick-box.
- Select the Tag Type that contains the Tags you want to use from the drop down. If you haven't already created the Tags and Tag Types, go and do that (instructions below), then come back here and select your Tag Type in the drop-down.



Select the **Save** button

CPD Points Colour Legend

Colours for Points do not have the same meaning as the colours do in the CPD Plan. There are only 2 colours for Points, red and green. They both represent the % of completion for Points per Tag where 0% completion is red, 100% completion is green and 50% completion is half red and half green.



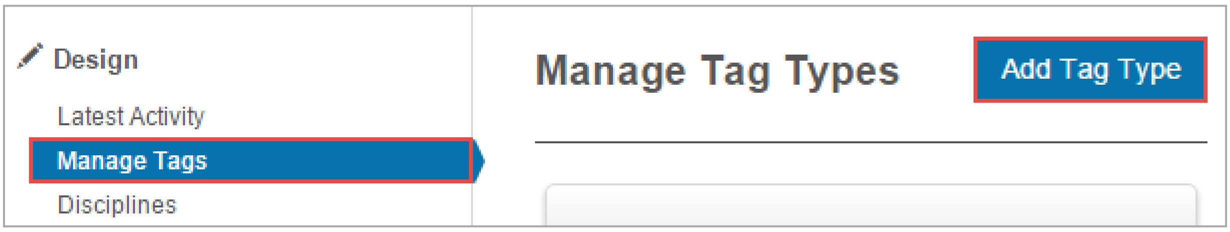
CPD Tags

The purpose of Tags is to put names to the CPD Points. They are used in 2 places:

1. The CPD plan where Points are assigned to the Tags.
2. Catalogue items to identify which Points the learning relates to. If a User needs to complete a certain number of Points associated with their CPD plan, the user can choose catalogue items with the associated Tags.

Tags types are used to categorise Tags, you will need to create a Tag Type first:

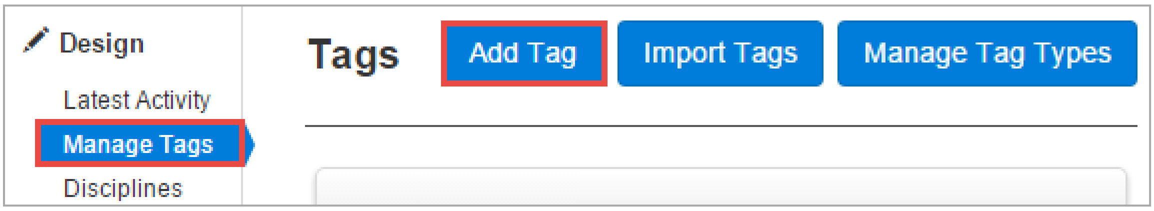
- Select **Design** > **Manage Tag Types**.
- Select **Add Tag Type**.



- Give the Tag Type a name, for example CPD. The rest of the form is not important to populate.

To create Tags:

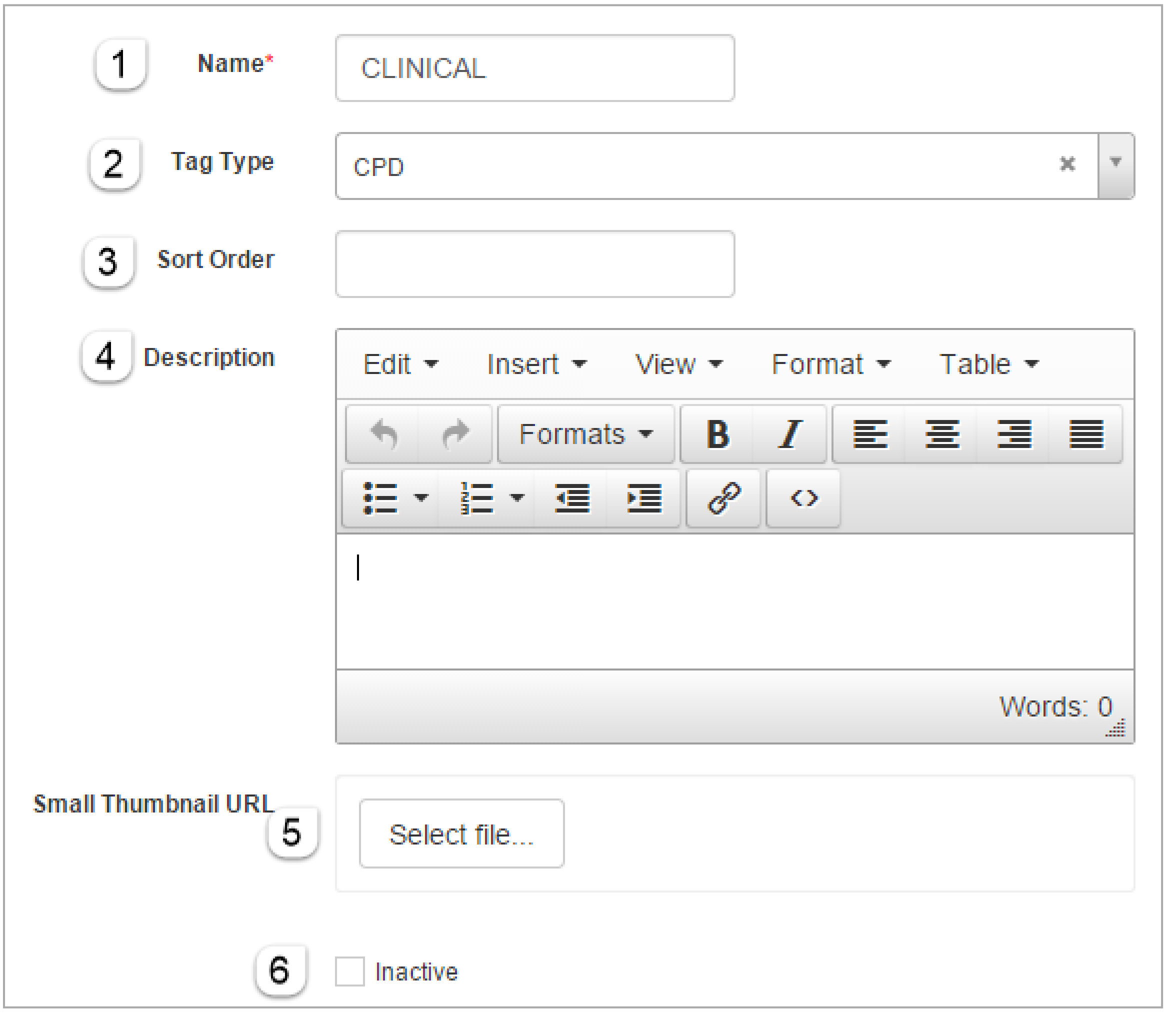
Browse to **Design** > **Manage Tags** > **Add Tag**.



The New Tag form will require the following information:

1. Name – the name of the Tag.
2. Tag Type.
3. Sort Order – this field is not required for CPD.
4. Description – this is an optional field to add information about the Tag.
5. Small thumbnail URL – not required for CPD.
6. Inactive- this needs to be set to active unless it is no longer required.

Click Save Tag button



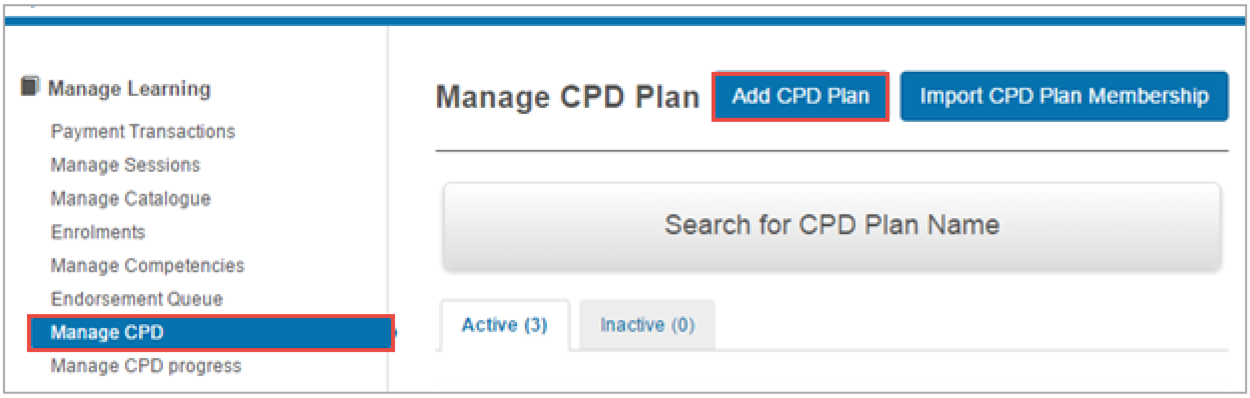
CPD Plans

CPD Plans allow you to design the CPD requirements and allocate the Plan to specific users within the system. For example a CPD Plan for a lawyer will differ to a CPD Plan for a paramedic. The CPD requirements are set by selecting Tags and specifying how many Points a user must reach to satisfy the requirement and in what time frame they have to achieve this. It is important to remember that when a Learner is assigned to the CPD Plan they are deemed as starting the Plan as Compliant. The goal of the Plan is to ensure that they maintain this compliance by continuously undertaking training.

Creating a CPD plan

To create a new plan follow the below steps.

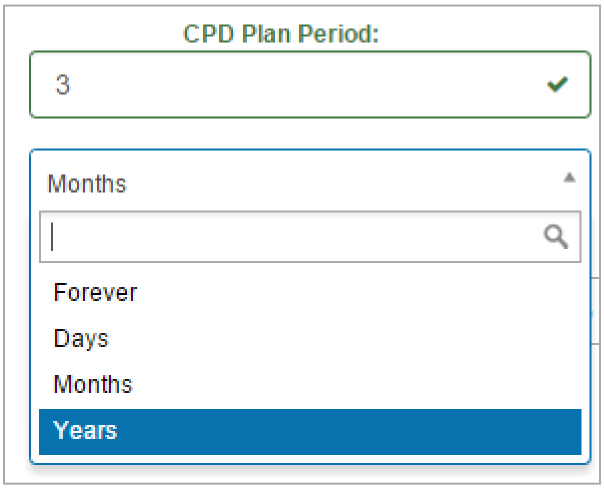
- Select **Manage Learning** > **Manage CPD**
- Select **Add CPD Plan** button



The New CPD plan form will require the following information. Please see the image at the bottom of this list to view the related fields:

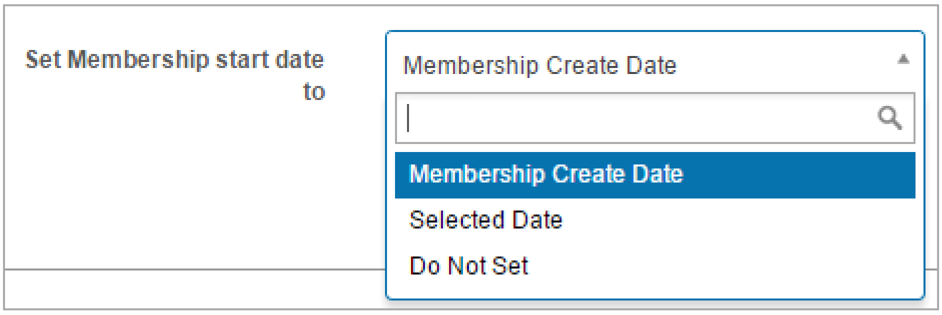
1. Name – the name of the plan.
2. Identifier – this will be auto-populated.
3. Description – this is an optional field to add information about the CPD plan.
4. Active - this would be set to active unless it is no longer required.
5. Primary Contact – this is an optional field to assign a primary contact for the Plan.
6. CPD Plan Period - enter the timeframe the User has to complete the CPD Plan. The top field must be a number and relates to the dropdown below. For example a User has 3 years to complete the

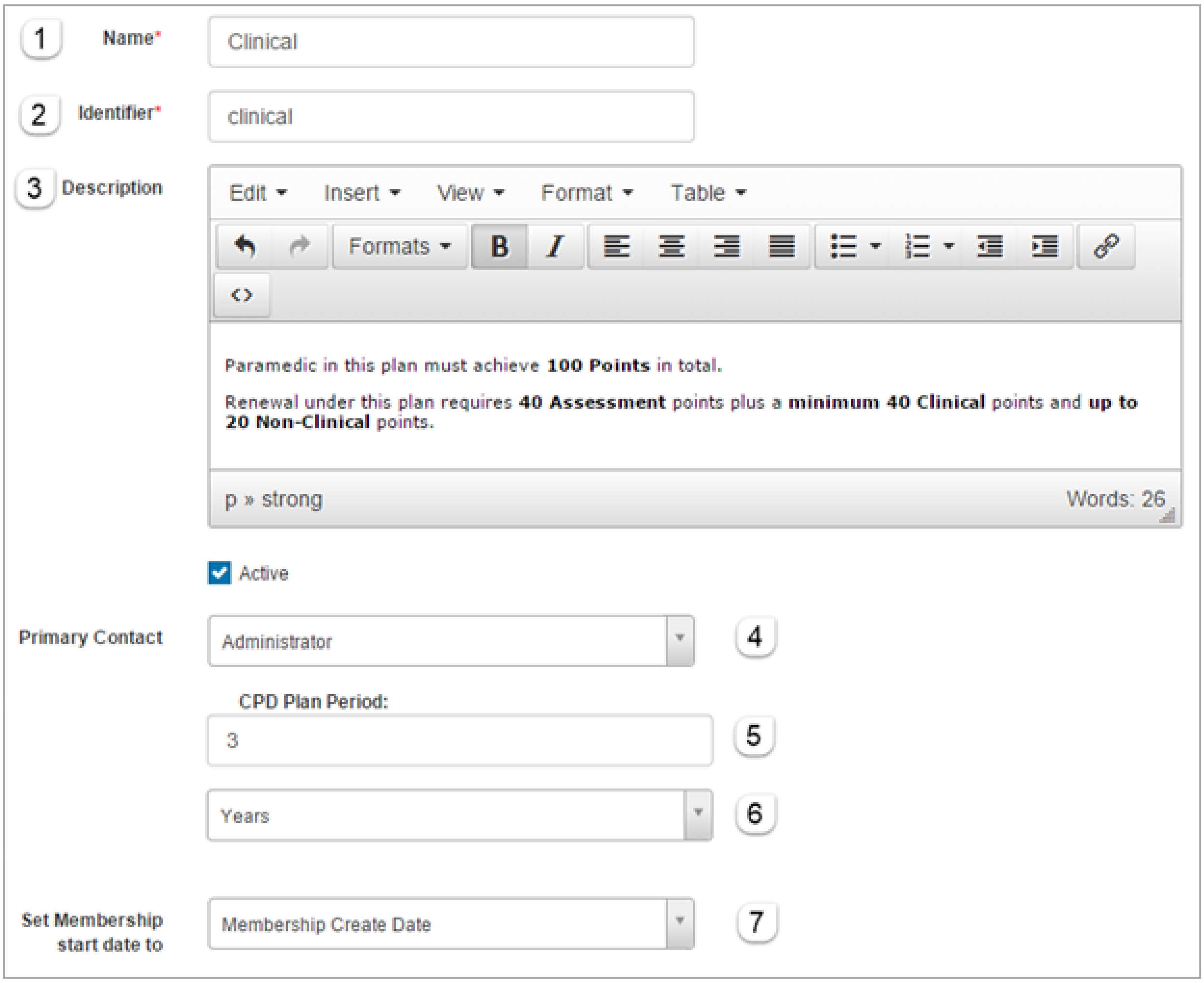
plan. Forever means that the User has no restriction on how long it takes them to complete the plan.



7. Set Membership start date to - select the option that corresponds to when you would like the plan period to start.

- Membership Create Date – this is the date the user is added to the CPD plan as a member.
- Selected Date – a date picker will appear for you to choose a specific date for the plan to start.
- Do Not Set – there is no start plan, usually used in conjunction when the plan runs forever.





What Points are required?

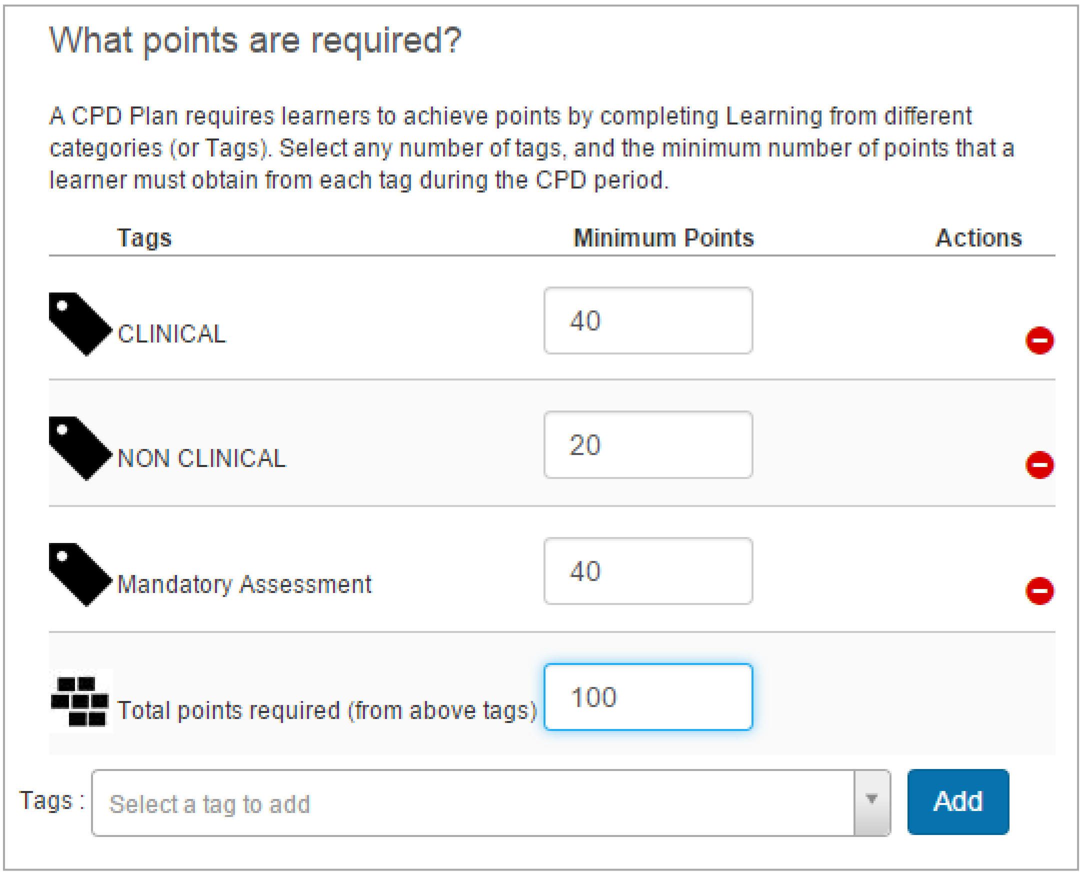
A CPD Plan requires learners to achieve Points by completing Learning from different categories. In the CLS the categories are defined using Tags.

This section of the CPD plan form allows you to select any number of tags, and the minimum number of Points that a learner must obtain from each tag during the CPD period.

- In the Tags field drop-down select the **tag** you would like to add to the plan. You can add as many tags as needed. Click the **Add** button to add it to the plan. Note that only the tags in the Tag Types you specified in **Settings** > **Points Settings** will appear here. If there are no tags in the drop down, go back to **Settings** > **Points Settings** and make sure the right Tag Types is present in the drop-down there.
- Enter the **Minimum Points** for each tag, this is the minimum number of Points that a User must

obtain in the plan period.

- Enter the **Total Points** required which is calculated from above tags.

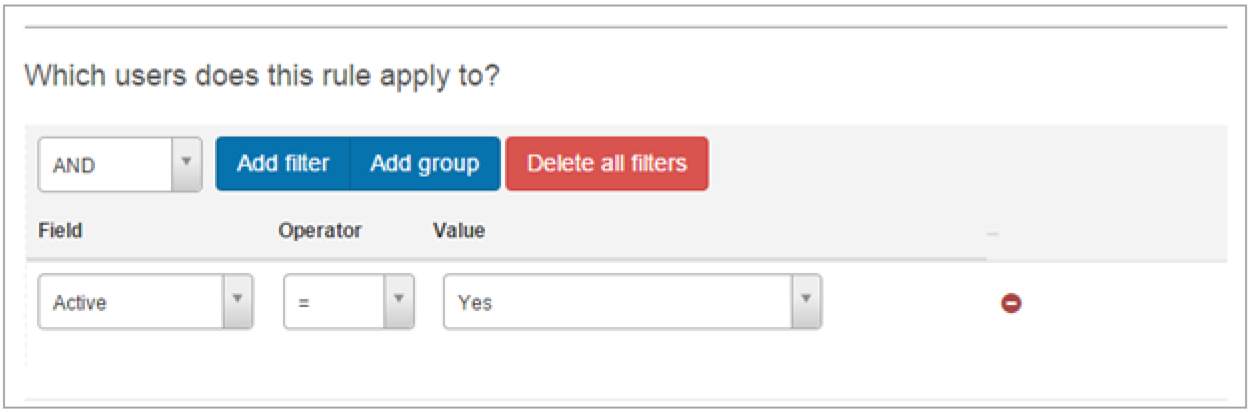


Note that the **Total Points** shows the overall percentage completed in the chart and total Points below the chart. The chart is covered later in the document. The chart only shows completed when all tags are completed and all Points obtained

Which users does this rule apply to?

This section allows you to specify which Users you would like to add to the plan. In the screenshot below all active users will be added to the plan. You could add filters such as organisations, job Positions or Groups.

For more information on building filters please refer to the document on **Customisable reports** > **Building Filters**.



- Click **Save CPD Plan** button

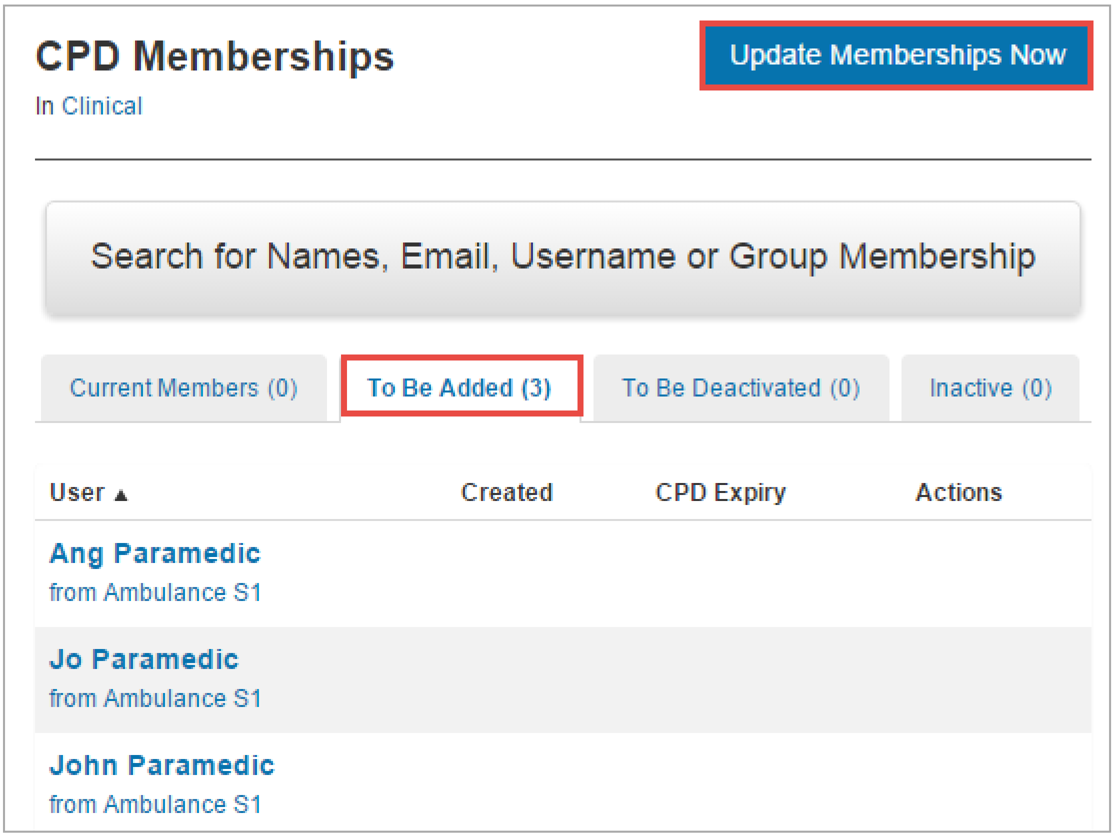
Updating memberships

Once your plan is created you will have the option to view and update the memberships.

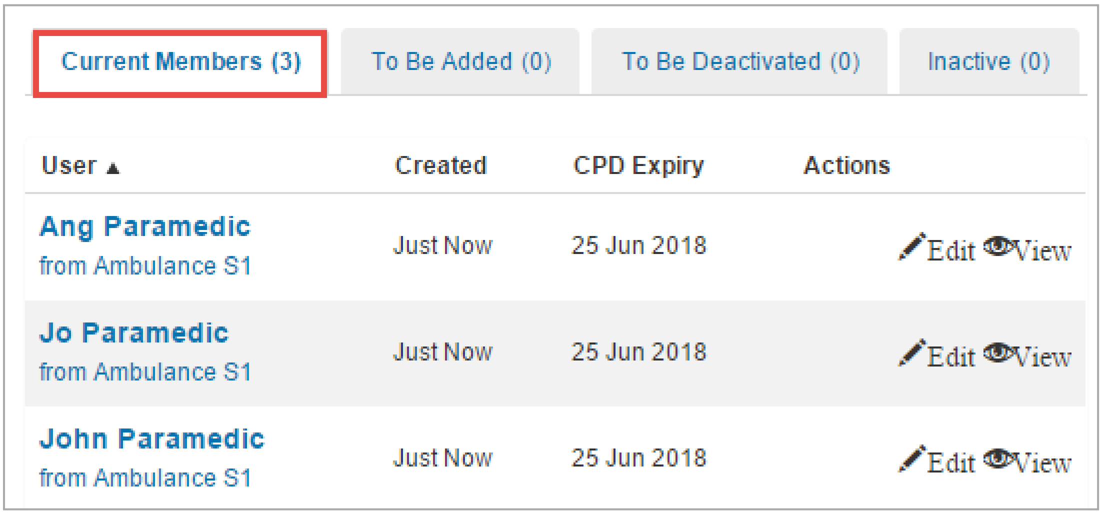
- Click the **View Memberships** button to view or to update the memberships. 4 tabs exist to filter the memberships.
  - Current Members - Users that are already members of the plan.
  - To be Added -Users that, according to the ‘Which users does this rule apply to?’ section of the CPD Plan, match the rule.
  - To be Deactivated - Users that, according to the ‘Which Users does this rule apply to?’ section of the CPD Plan, no longer match the rule. This can occur when a rule on a CPD Plan is changed after Users have become members
  - Inactive – Users who used to meet the rule but were deactivated are now listed as inactive.

Based on the filter we set up in the above example, there are 3 Users (all Active Users) who will be added to this plan.

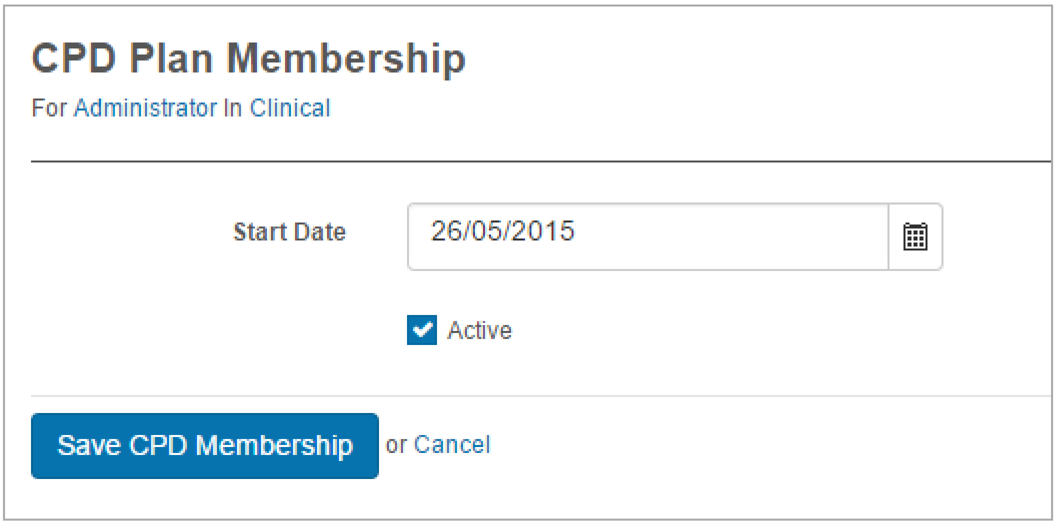
- Click the **Update Membership Now** button to add these Users.



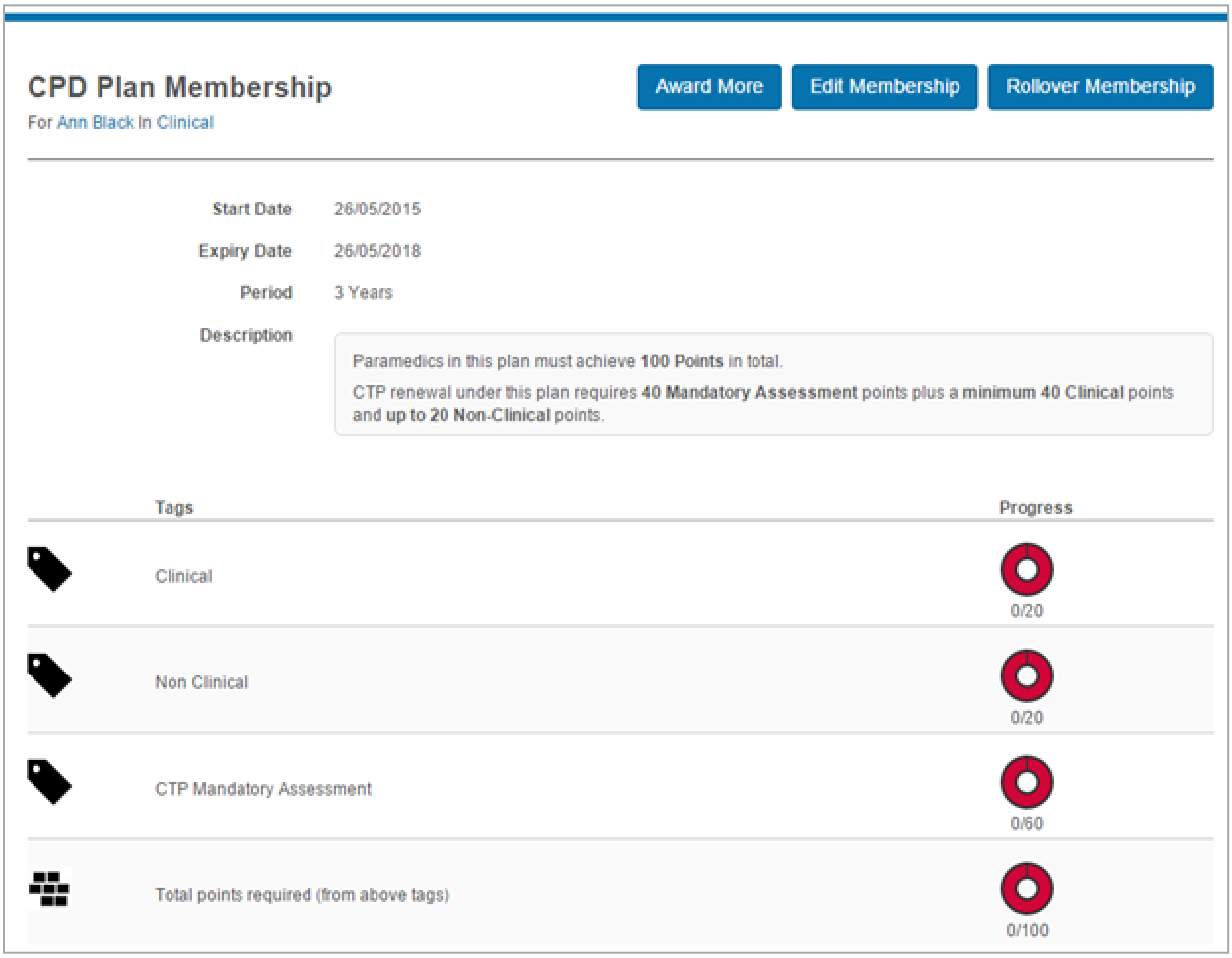
The Users listed in the **To Be Added** tab now appear in the **Current Members** tab.



The Edit link gives you access to edit the Start Date of the plan for that User. It also gives you the option to set the plan for that user to Inactive.

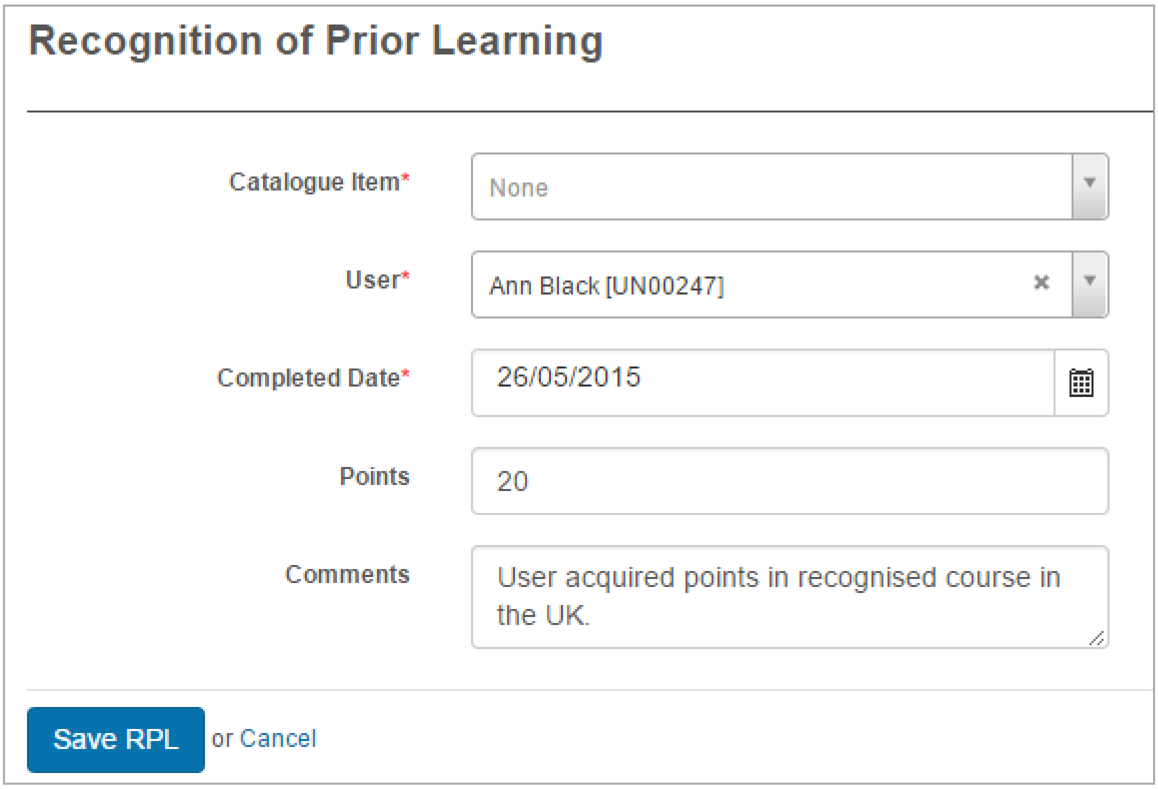


The **View link** opens a page where the user's progress can be viewed, more Points can be awarded, membership can be edited and membership can be rolled over.



Award More

This gives you the option to award Points for example if the User has Recognition of Prior Learning (RPL).



Please note that The RPL functionality must be enabled first.

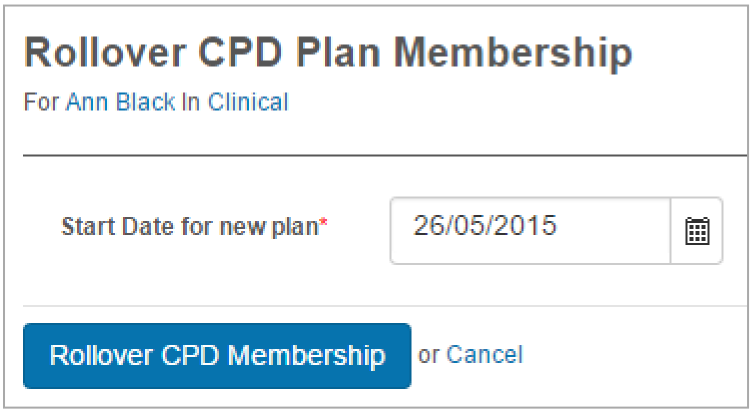
- Select **Settings** > **Tenant Settings**.
- Expand the **Miscellaneous** section.
  Check the **Enable RPL** tick-box.
- Select Save Settings.

Rollover Membership

This feature allows you to refresh the CPD Plan Membership for a new period and gives you the option to set a start date for the new plan. Setting the new plan will complete the currently active membership and a new membership will be created. Be careful as this cannot be undone.

The purpose of this feature is to create a new membership for the user if users need to continuously meet their CPD requirements. With professions such as paramedics and lawyers, training is ongoing.

The old plan membership can be viewed on the current plan membership details page in the section called Membership History.



CPD and Catalogue Items

Now that we have a plan assigned to our Users we need to provide a way for them to achieve their points. This is achieved with Catalogue items. There are several components required for a CPD based Catalogue Item:

- Catalogue item.
- Linked Assets e.g. courses, sessions etc.
- Tags.
- Assign points to the tags.

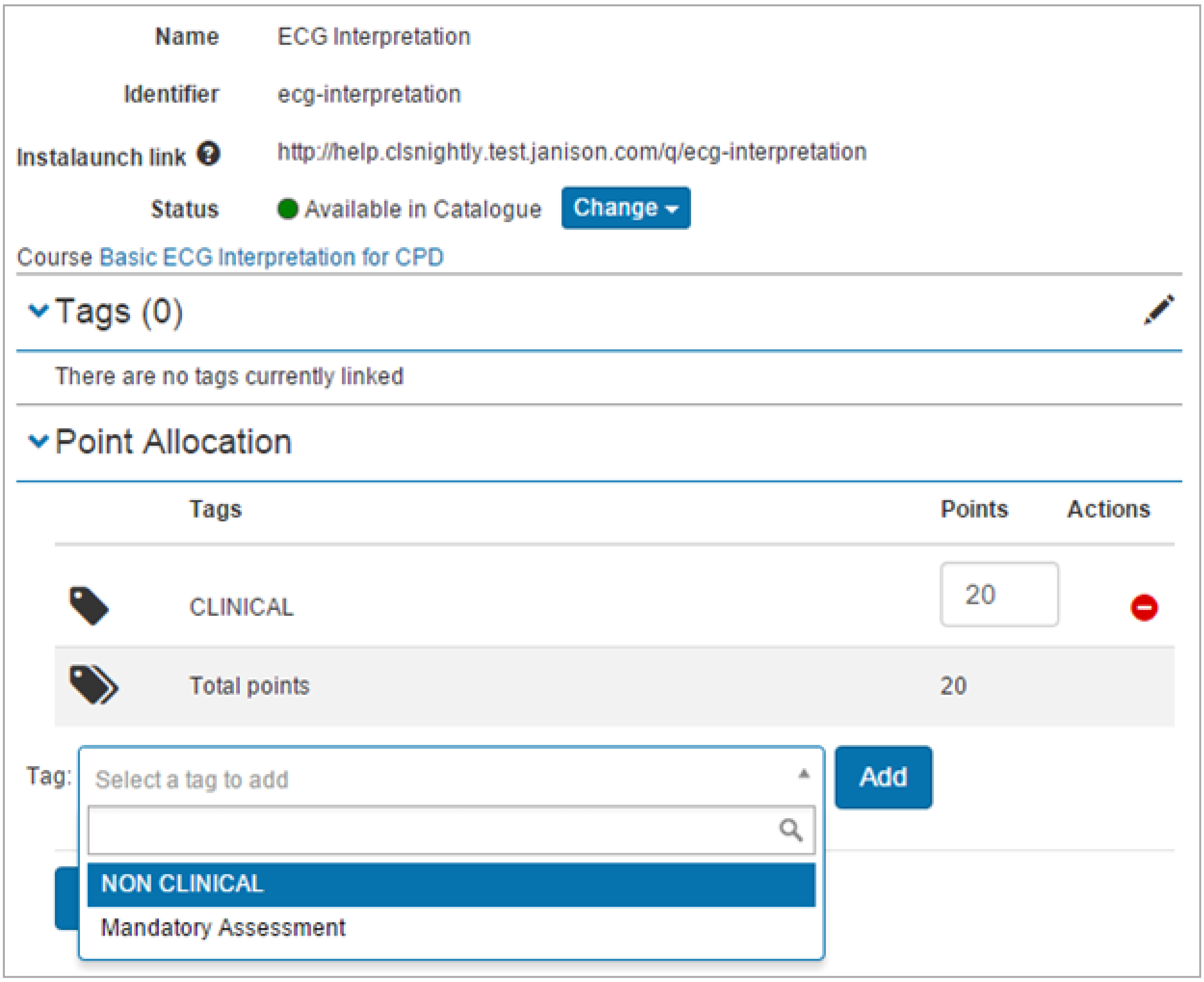
Create Catalogue item

You will need to create a Catalogue Item with one or more learning assets. For instruction on creating a Catalogue Item please see the document on Manage Catalogue.

Linking CPD Tags and points to a catalogue item:

To link CPD tags to catalogue items:

- Select **Manage Learning** > **Manage Catalogue**.
- Search for and open the required Catalogue Item
- Click the pencil in the **Point Allocation** section



- To add a tag, select it from the drop-down menu and click **Add**
- The Tag will appear in a table with a blank text box next to it to assign points.
- Add as many Tags and Points as you need and click the **Save** button that is directly under the Tag drop-down.

In the above example, there is one tag (Clinical) linked to this Catalogue Item and a learner that successfully completes the item will get 20 points.

Notes:

- If there are no tags to select in the drop down then you haven't done the set-up properly. Go back and check that your Tag Type is recorded in **Settings** > **Points Settings**
- You don't have to include all the Tags from your Tag Type in every Catalogue Item, just the ones you want to attach points to.
- You can use fractional points i.e. 0.5.

Allowing Users to Record their own CPD Points

Many times, a professional will complete learning outside the Janison CLS. They might, for example, attend a seminar or workshop, collaborate on an academic paper, or complete a course at another training organisation. When they do this training, they can record the fact of that learning, and how many points that learning is worth, in the Janison CLS. There are two features in the system that allow users to record their own CPD points:

- Other Learning
- Learning Plans

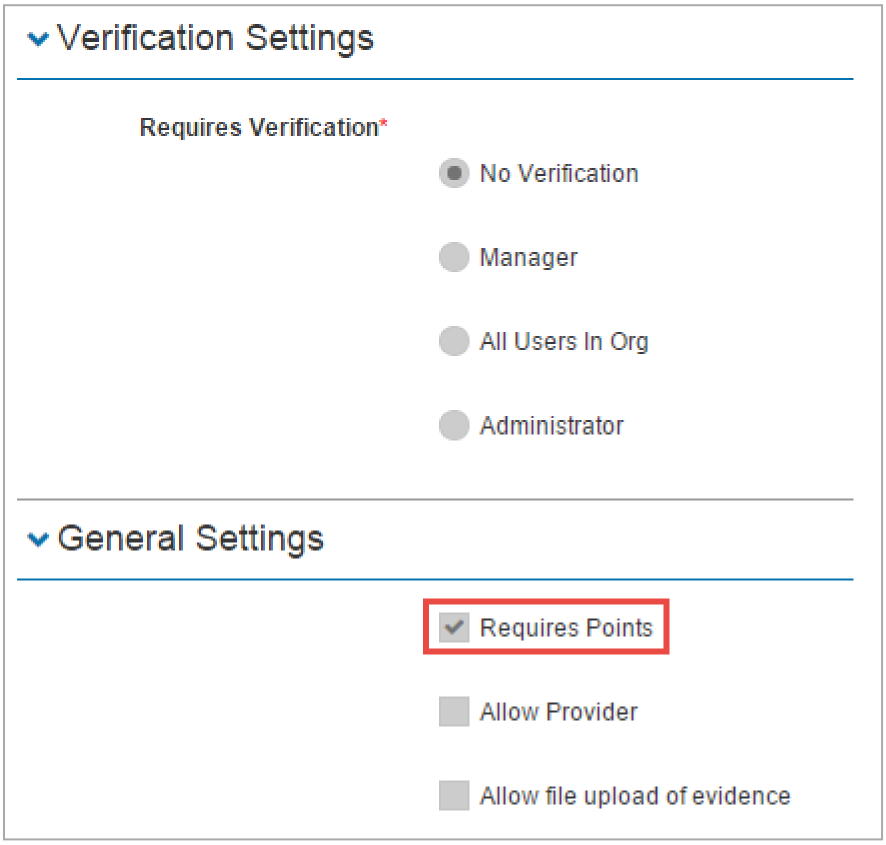
Adding Points from Other Learning

How to set this up for the user:

Go to **Manage Learning** > **Manage Learning Assets** > **Add Learning Asset**.

Select **New Other Learning** from the list.

Complete the fields and then scroll down until you can see this part of the screen



Tick the "**Requires Points**" tick box.

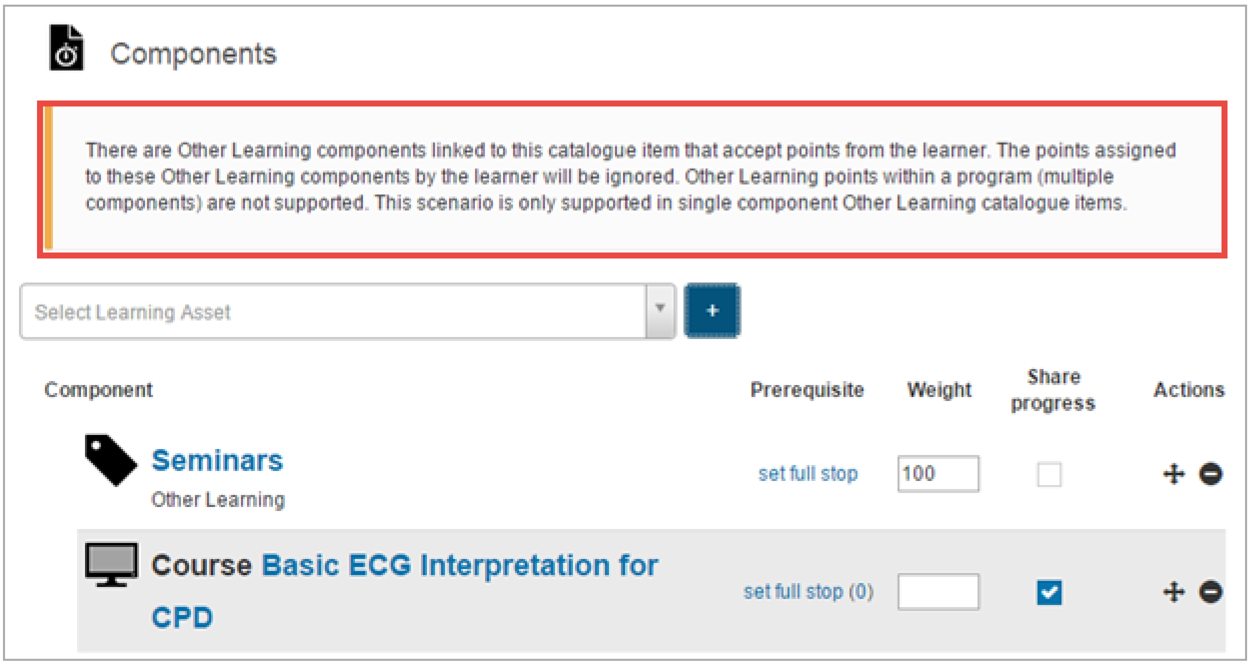
If you are using learning plans (see the Learning Plans instructions for how), you will also need to tick the **Allow learner to link a learning plan entry** tick box.

If you would like the opportunity for someone to review the learner's self-accredited points, select a verification option from the Verification Settings.

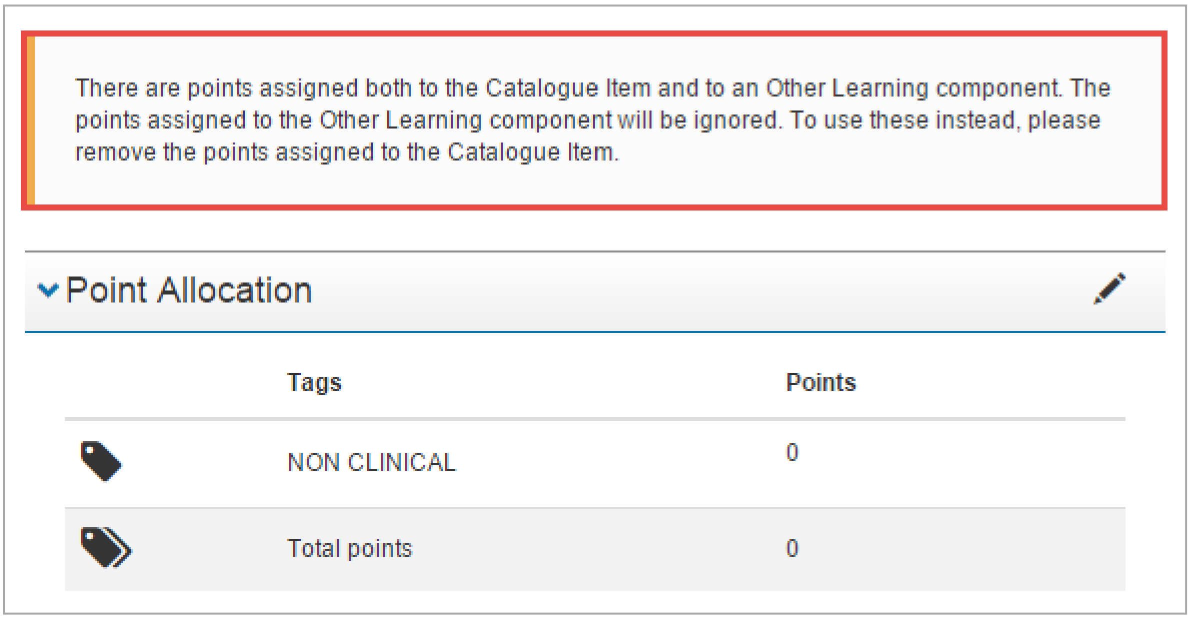
Catalogue item for Other Learning

As with all learning assets, Other Learning will require a catalogue item for the Learner to enrol in. Two set-ups are not supported with Other learning:

1. The catalogue item must only contain a single Component of Other Learning. If more than one component is added to the Catalogue item the points assigned by the Learner will be ignored. In this scenario a warning will appear notifying you of the limitation.



2. Points should not be added to the catalogue item containing the Other Learning as the points applied to the Other Learning will then be ignored. A warning notifying you of this will appear if points are applied to the Catalogue item.

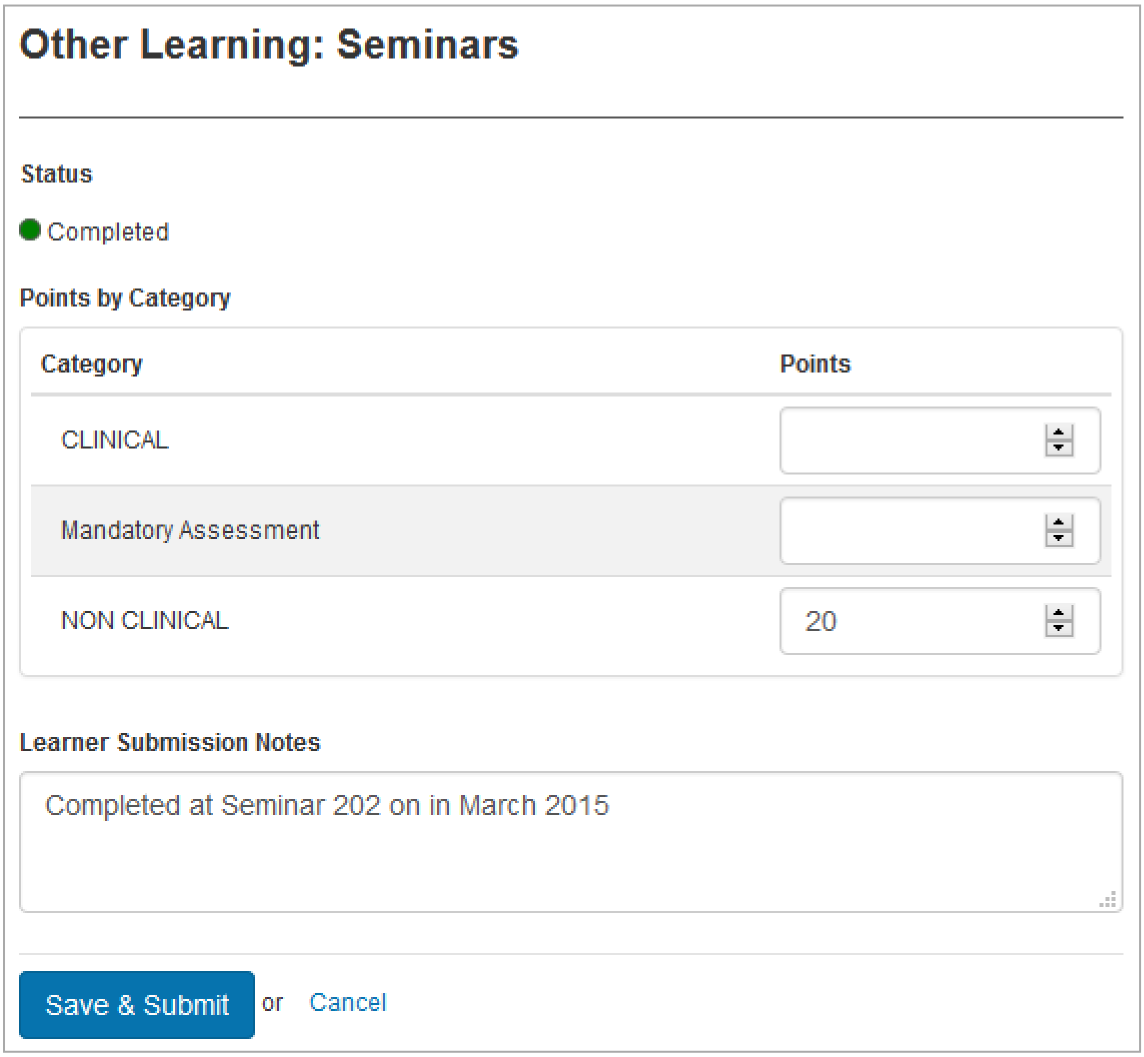


If you've created an Other Learning type catalogue item (see above), then users can use an enrolment in this to record learning that they undertake outside the JanisonCLS.

From **Browse Learning** They can select the **Other Learning** catalogue item and enrol.

Clicking the **Launch Other Learning** button will take them to a screen where they can enter a variety of information about the learning they've done (for more information, refer to the Other Learning user instructions).

To add points, the user populates the points against any Category as shown below in the screenshot.



Adding Points from Learning Plans

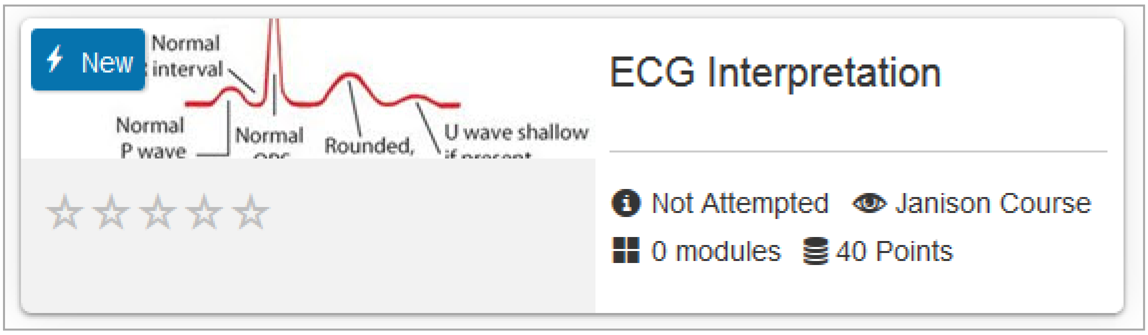
If the user is enrolled in a Learning Plan and that Learning Plan allows external learning to be recorded (refer to the Learning Plan instructions for how to set this up) then the **Log external learning** option will open the same user interface as above for the learner to record points.

How CPD looks and works for the User

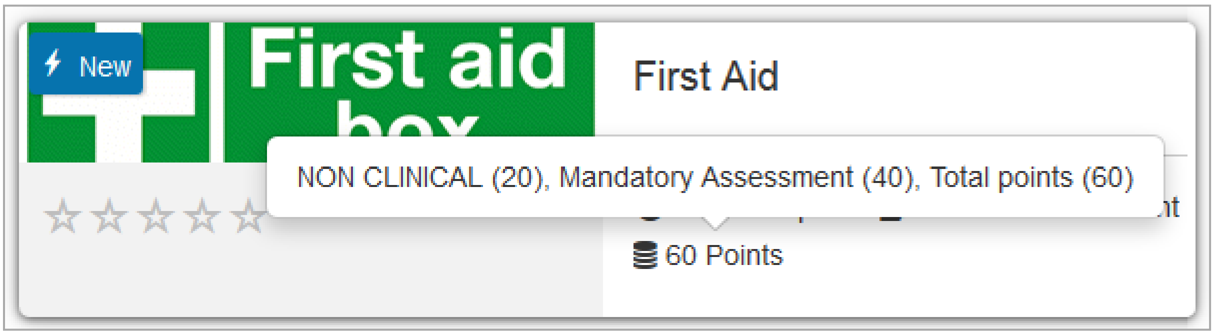
Once you have created your CPD plan and memberships the users can log into the system and in Browse Learning can view what items are available to achieve the required CPD Points.

Seeing how many Points a catalogue item will award the user

Each catalogue item that has Points attached will show the total number of Points available on the tile in the Browse Learning screen.



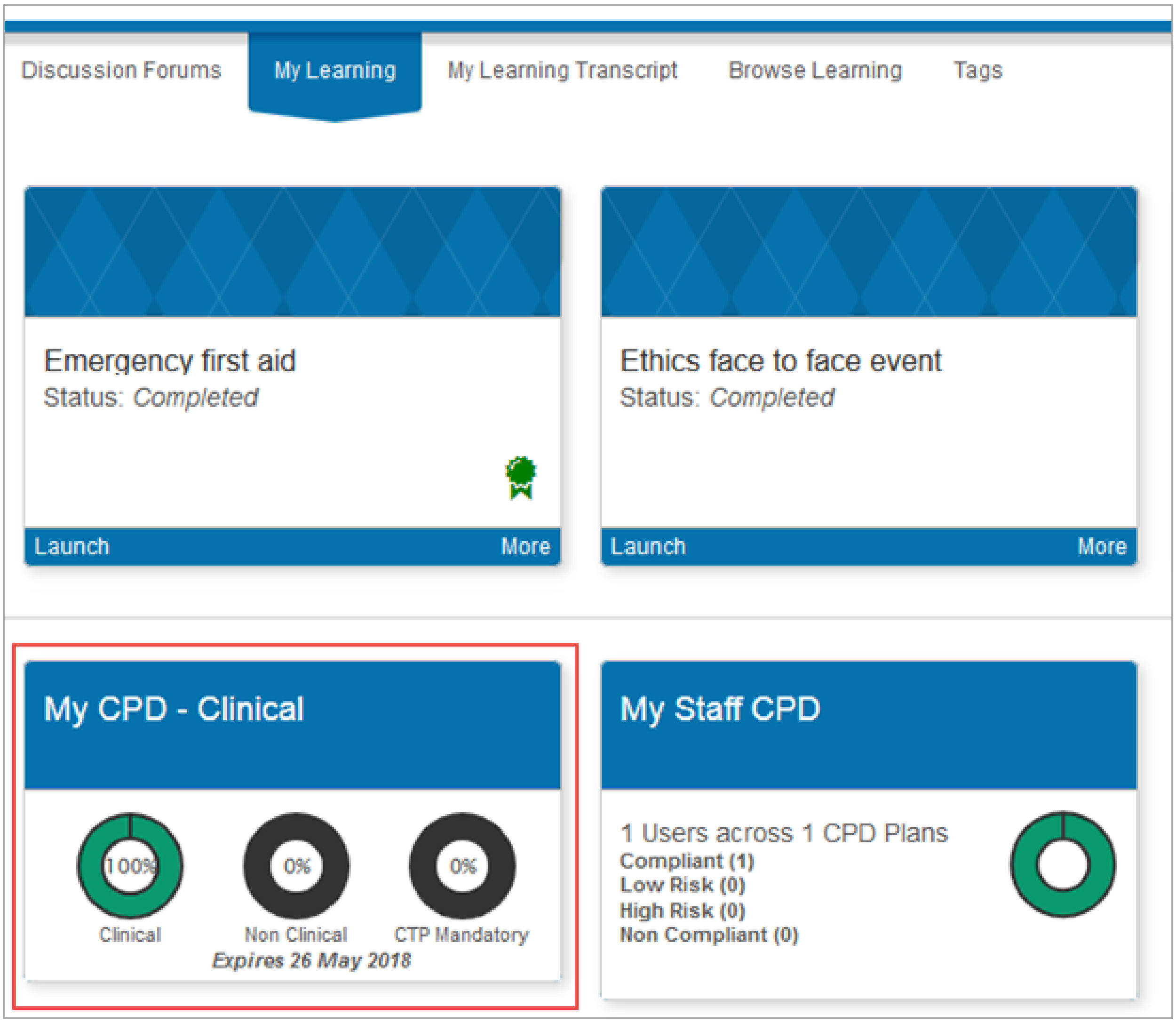
If the Learner hovers the mouse over the Points icon and text, the breakdown of Points by tag will be shown.



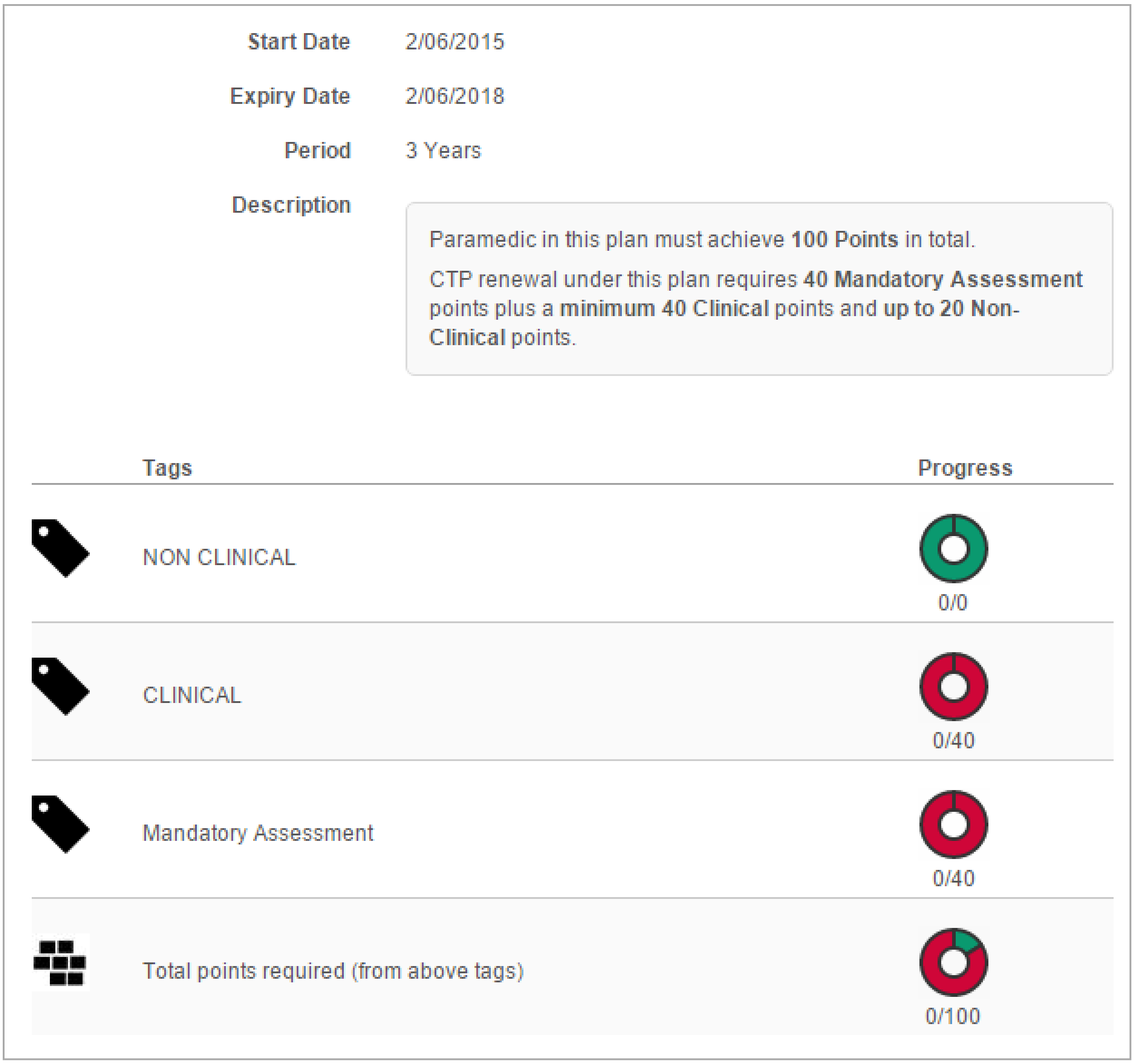
My Learning

When CPD is enabled, the My Learning screen gets split into two areas, the normal Learning Tiles area and an extra area for Other tiles. There are one or two CPD tiles included in this area, depending on your role.

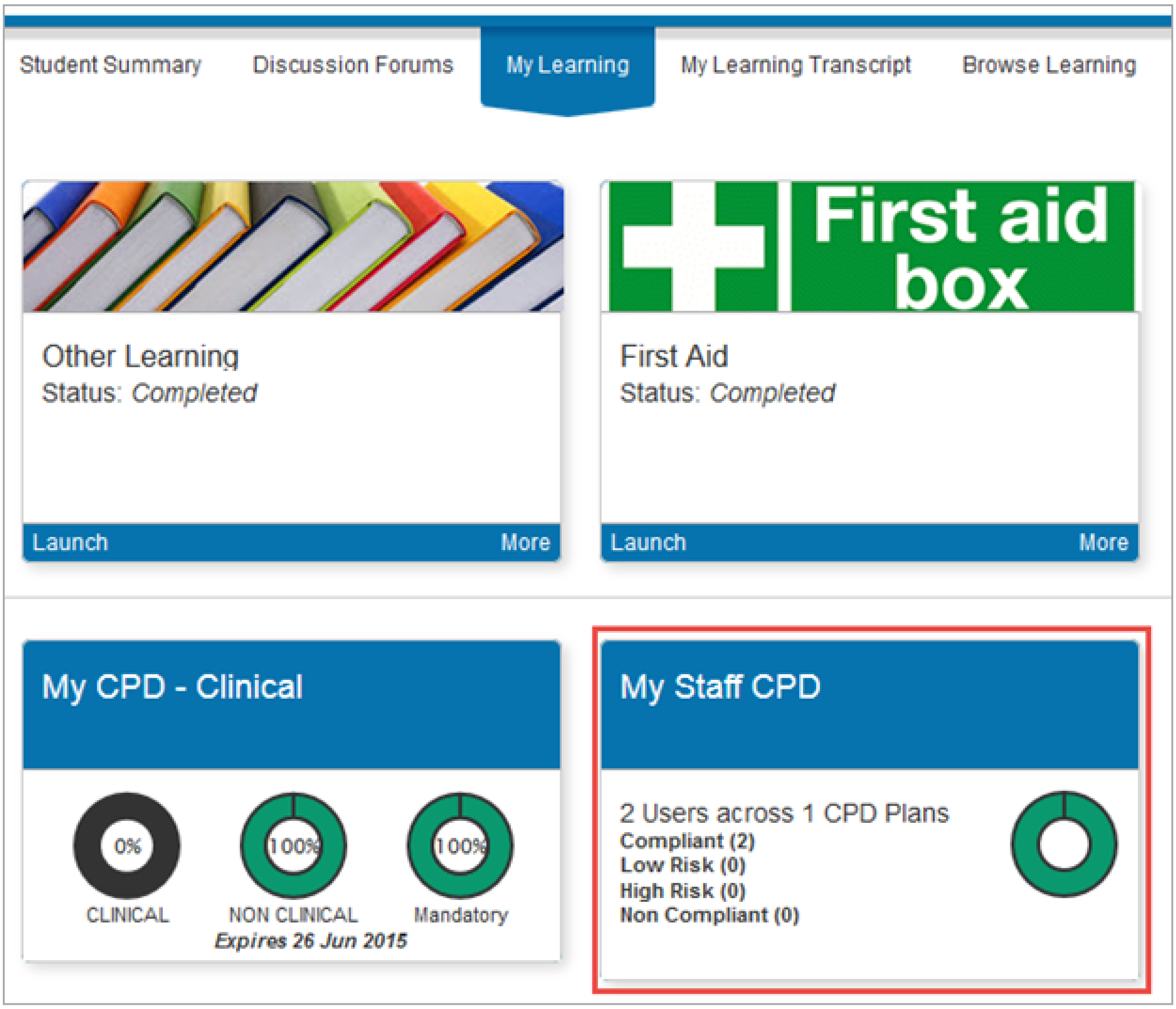
1. My CPD tile. This tile shows for Users with a CPD Plan. At a glance the tile shows circular graphs with the CPD Status. In the below image the Learner has achieved the Clinical Points but has not achieved the Non Clinical or CTP Mandatory Points. Keep in mind that they are compliant because they start the plan fully compliant. They will only become non-compliant when the plan date ends and they have not achieved the Points.



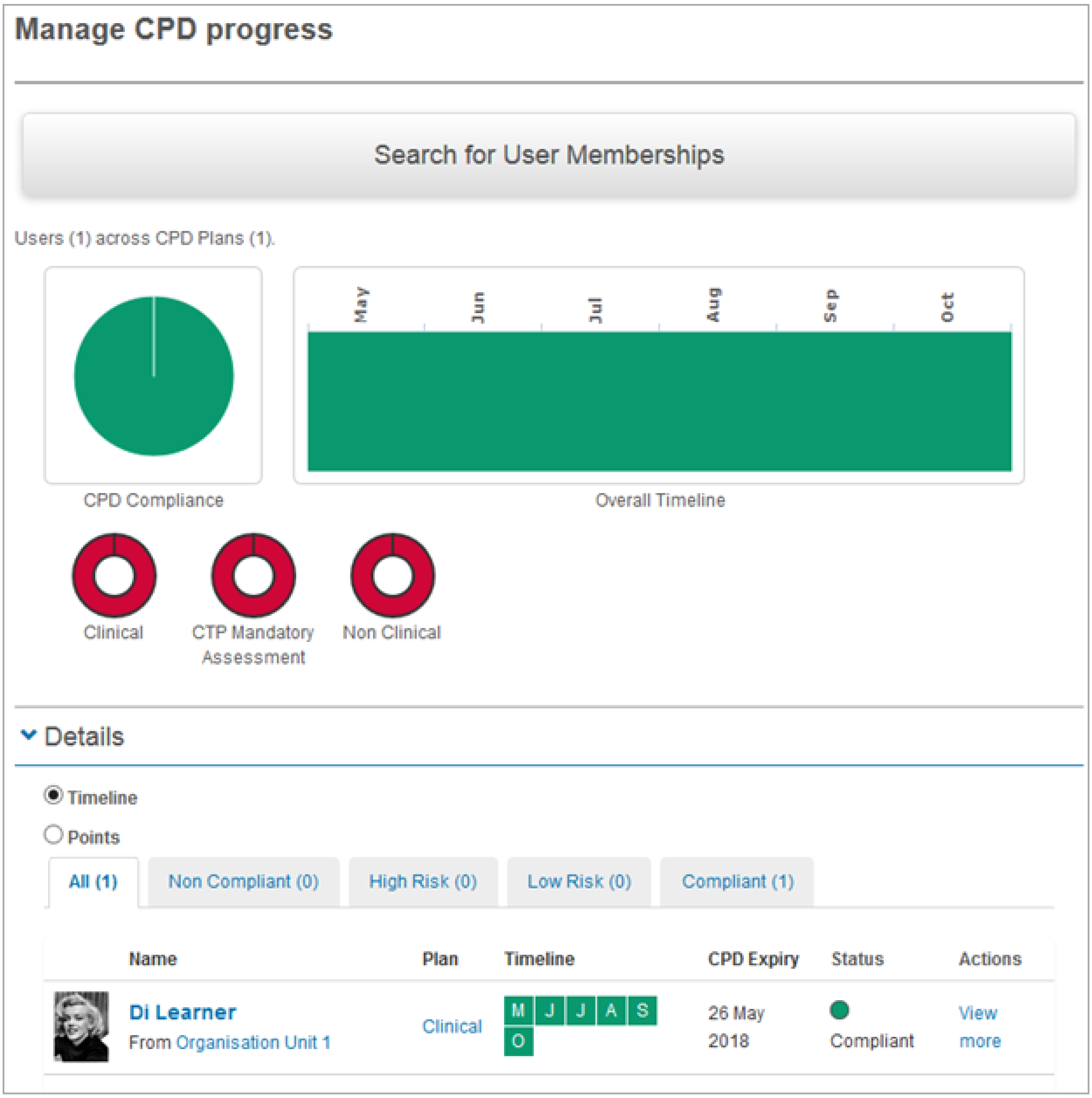
Clicking the tile takes the User to see the CPD Plan and status in more detail.



2. My Staff CPD tile – This tile will only be visible to Managers of Users. It shows the Manager the CPD details of the Users they are managing. At a glance the tile shows a circular graph with the CPD Status, and an overview of their Users' compliance. In the screenshot below this User managers 2 people and they are both compliant.



Clicking the tile takes the User to a screen where they can view and manage their Users' CPD and status in more detail. This tile is a shortcut to **Manage Learning** > **Manage CPD progress**.



Enrolment in CPD Catalogue Items

Users can be manually enrolled in CPD Catalogue Items and/or CPD Catalogue Items can be setup to appear under ‘Browse Learning’ where users can self-enrol into the Catalogue Items.

Users that are self-enrolling will need to view their ‘My CPD Plan’ to determine which Tags are needed to complete their CPD. Users will then need to see the Tags associated with the Catalogue Items in the ‘Browse Learning’ area so they can determine which Catalogue Items to enrol in.

Adjusting CPD Points per enrolment

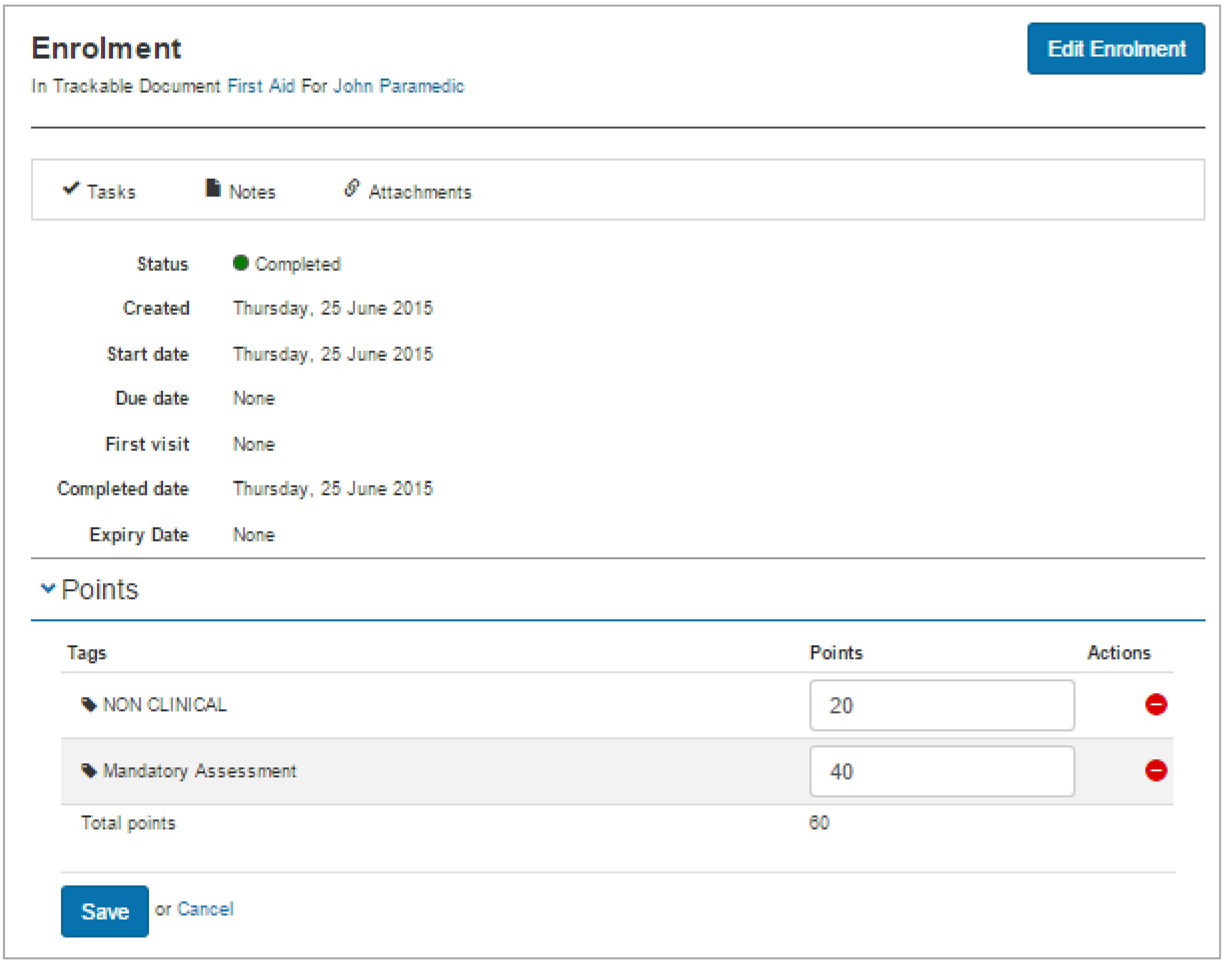
If the administrator needs to adjust the number of Points a user has earned (or self-assigned) for a catalogue item, this is done through Enrolments.

Go to **Manage Learning** > **Enrolments**.

Search for the enrolment that is to be edited.

Click the  icon to the right of the enrolment title

Click the pencil icon next to Points. The screen will look like this

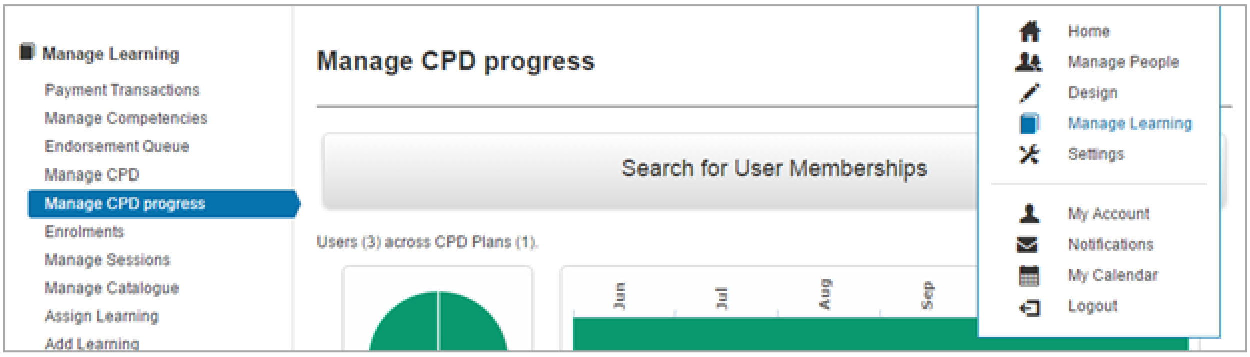


Make any adjustments necessary to the Points and **Save**.

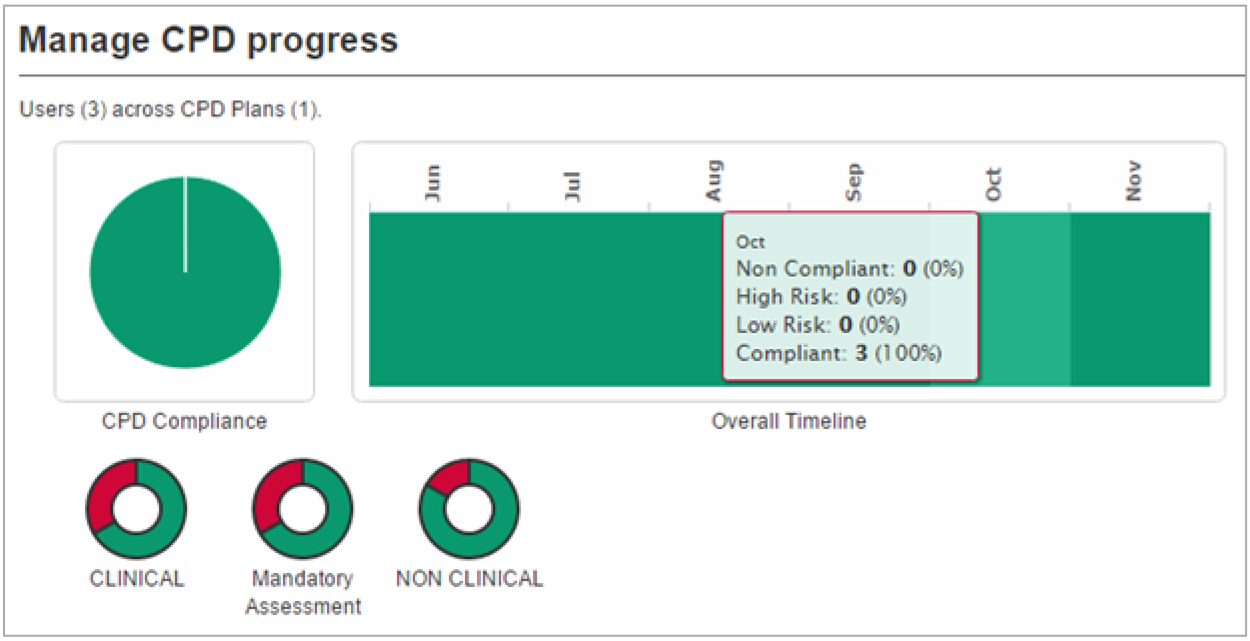
Manage CPD progress

Manage CPD Progress screen is made up of graphs depicting the overall CPD progress. This is the same screen accessed from the My Staff CPD tile.

Browse to **Manage Learning** > **Manage CPD progress**.



The top section is a summary dashboard of all users in the CPD plan. This gives the manager an overview of the compliance of Learners reporting to them. Hovering over each graph brings up additional information in a pop-up.



In the Detail section you are able to see a detailed breakdown of individual Learners.

There are two options, Timeline and Points:

1. Timeline – This displays a list of users using a monthly breakdown with the following columns:

- User
- Plan
- Timeline (Shows monthly status)
- CPD Expiry
- Status
- Actions > View More

Name	Plan	Timeline	CPD Expiry	Status	Actions
Jo Paramedic From Central Coast	Clinical	J A S O N D	02 Jun 2018	Compliant	View more
Ang Paramedic From SW Sydney	Clinical	J A S O N D	15 Jul	Low Risk	View more
John Paramedic From Coffs Habour	Clinical	J A S O N D	31 Aug	High Risk	View more

2. Points' – This displays a list of users using a Tag breakdown with the following columns:

- User
- Plan
- Tags which represent the points per tags
- CPD Expiry
- Status
- Actions > View More

Name	Plan	Tags	Total	CPD Expiry	Status	Actions
Jo Paramedic From Central Coast	Clinical			02 Jun 2018	Compliant	View more
Ang Paramedic From SW Sydney	Clinical			15 Jul	Low Risk	View more
John Paramedic From Coffs Habour	Clinical			31 Aug	High Risk	View more

- Each of the options above contains a series of filters you can select including:
  - All Users.
  - Non-Compliant Users.
  - High Risk Users.
  - Low Risk Users.

- Compliant Users.
- Click View More next to the required user to inspect that users CPD plan membership.

It is important to remember that the colours of the Tags do not have the same meaning as the colours of the CPD plan Status. Please see the section above on CPD Points Colour Legend for more detail.

My Learning Transcript and CPD Points

Three options are available for displaying Points on the My Learning Transcript. These settings are accessed from **Settings** > **My Learning Transcript Settings**.

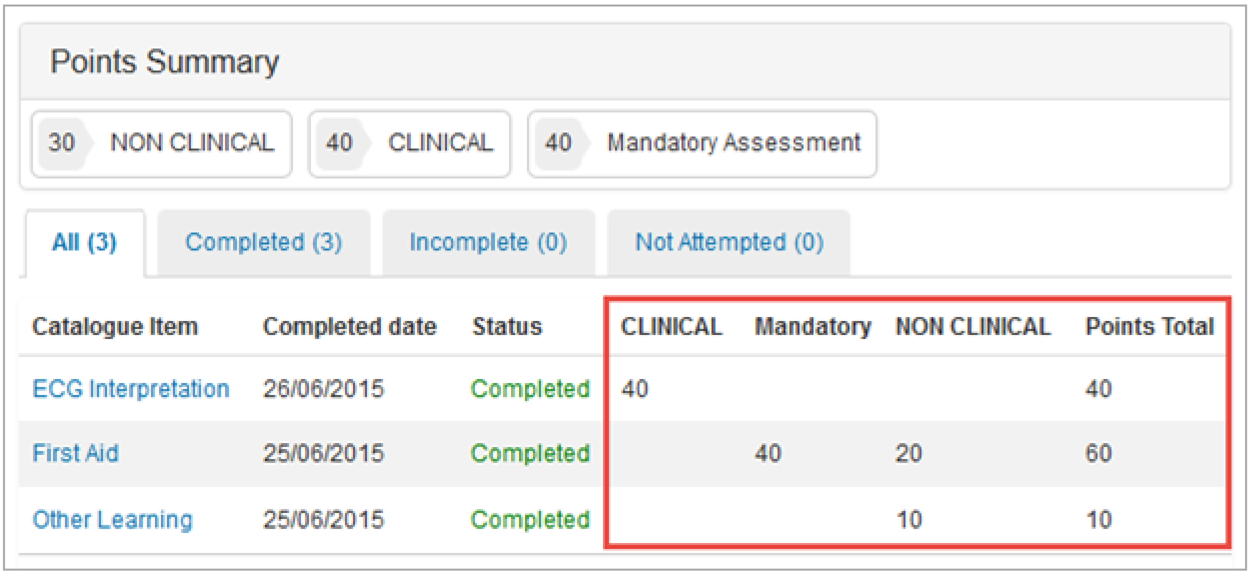
- [x] Show Points
  - [x] Based On Tag Type
    - [x] Only Tags In My CPD

1. Show Points – Shows Points achieved in a single column as highlighted in the screenshot below.

All (3) | Completed (3) | Incomplete (0) | Not Attempted (0)

Catalogue Item	Start date	Completed date	Status	Points
ECG Interpretation	25/06/2015	26/06/2015	Completed	40
First Aid	25/06/2015	25/06/2015	Completed	60
Other Learning	25/06/2015	25/06/2015	Completed	10

2. Based On Tag Type – will show a separate column for each Tag Type within the Points Settings selected Tag Type. This is highlighted in the screenshot below. A Points Summary section will appear at the top of the transcript.



Catalogue Item	Completed date	Status	CLINICAL	Mandatory	NON CLINICAL	Points Total
ECG Interpretation	26/06/2015	Completed	40			40
First Aid	25/06/2015	Completed		40	20	60
Other Learning	25/06/2015	Completed			10	10

3. Only Tags In My CPD – This only shows columns for Tags listed in the user's CPD Plan. This means that columns that would be empty do not appear on the transcript.