

Council for Estate Agencies (CEA) My CPD Portal (version 4.1) User Guide – Salesperson

W.e.f. 14 Aug 2023

Document Change History

Document Changes	Date	Description
1.0	18 Aug 2017	Initial
2.0	7 Aug 2018	Added a section on Delete Attendance Record under Attendance Management for Salesperson and a section on CPD Overall Fulfilment under CPD Requirement Monitoring.
3.0	9 Jul 2019	CPD Revamp
3.1	2 Sep 2019	- Added Rate Core Course -Renaming View 13-18 Attendance and View 13-18 CPD Requirement to View Past Attendance and View Past CPD Requirement for CPD revamp -Updating the screenshots
4.0	31 May 2022	Sitefinity Upgrade to v13.3 and changing SPCP Login from SAML to OIDC
4.1	14 Aug 2023	Change figures 1 & 2

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1 Introduction

1.1 My CPD Portal

"My CPD Portal" is a common platform to

- Allow course providers to introduce new courses and seek approval from CEA to conduct them;
- Keep course providers updated on their application status via the system or via email notifications depending on their roles. Each role has its own specific notification.;
- Allow course providers to update and add course dates/sessions and trainers for approved courses;
- Allow course providers to correspond with CEA Administrators through an inbox;
- Allow Salespersons/KEOs to store and track CPD attendance records;
- Allow Salespersons/KEOs to track CPD requirement fulfilment status; and
- Allow KEOs to approve non-core CPD courses taken by their salespersons.
- Allow the syncing of CPD requirement fulfilment data with EAS system for renewal process

1.2 Salesperson

As a Salesperson, you can use this system to submit your attendance records for CPD courses (Generic Competencies Courses). You can also rate the courses that you have attended.

2 Login

2.1 Login Functionality

You can login to the CPD System via https://www.cea.gov.sg/industry-development/cpd/my-cpd-portal. Click on the login tab using the top bar as shown below:



Figure 1: My CPD Portal – Login tab

Login option landing page will be displayed to choose to login with SingPass (Individual tab) or CorpPass (Corporate tab).

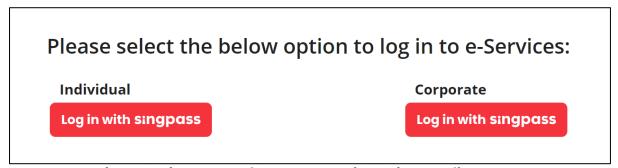


Figure 2: SingPass and CorpPass Login Option Landing Page

Choose SingPass for example, you may scan the QR code with your Singpass app or you may click on 'Use password login instead' and key in your Singpass ID and Password as shown below:

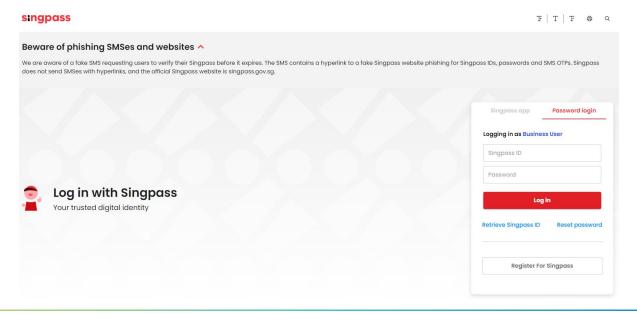


Figure 3: Singpass Login Page

Once logged in, you will see the dashboard in Figure 4. Click on Salesperson, you will be directed to the dashboard shown in Figure 5.

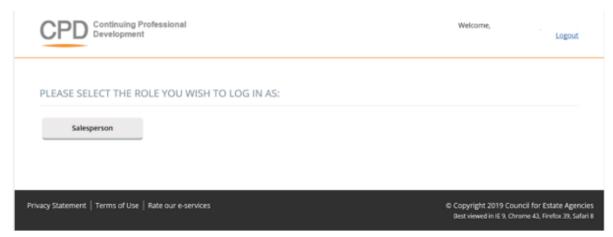


Figure 4: Role dashboard

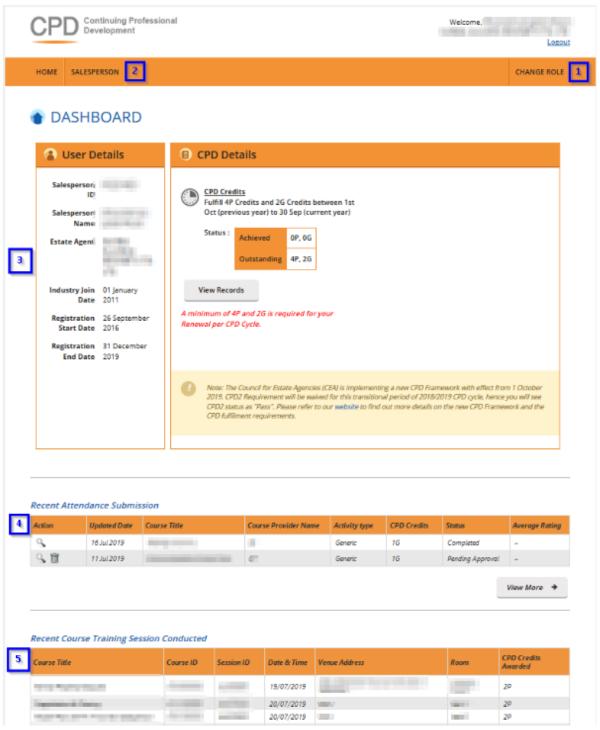


Figure 5: Salesperson Dashboard

Description:

1. Change Role

Clicking this will bring you back to the Role Dashboard

2. Salesperson

Click on this tab to view Attendance Management or CPD Requirement Monitoring

3. User Details and CPD Details

The User Details panel displays SP's registration details.

The CPD Details panel shows SP's CPD Credit status. Click View Records to view the detailed records. You will be redirected to CPD Requirement Monitoring Module.

4. Recent Attendance Submission

This panel shows the recent attendance submissions made. Click View More to go to the Attendance Management page. You will be directed to the page shown in Attendance Management.

5. Recent Course Training Session Conducted

If you are a Professional Competencies Course trainer, you will be able to see the recent Professional Competencies Courses that you have conducted.

3 Attendance Management

Attendance Management Module is provided to facilitate Salesperson to monitor the attendance record submissions in the system. Salesperson has the function to submit attendance for **Generic Competencies** courses only.

To access the Attendance Management page, click Salesperson >> Attendance Management.



Figure 6: Salesperson tab dropdown menu: Attendance Management

You will be directed to the page below:

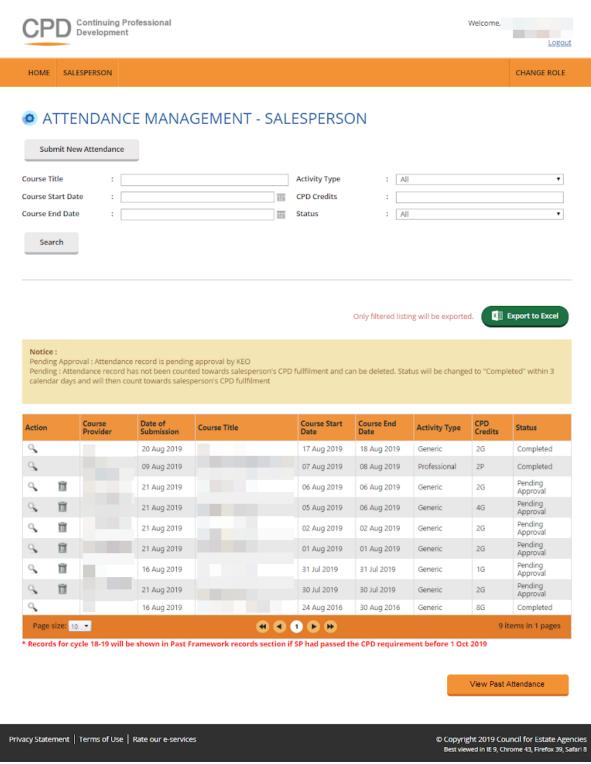


Figure 7: Attendance Management - Salesperson

- With effect from 1 Oct 2019, existing Salesperson will see the following when viewing the Attendance Monitoring page:
 - Attendance records submitted in 18-19 Cycle
 - o Attendance records to be submitted in 19-20 Cycle (if any)

 "View Past Attendance" button to view past attendance records (see section 3.6).

3.1 Submit New Attendance

To submit Generic Competencies attendance record, click the Submit New Attendance button and you will see the pop-up shown below:

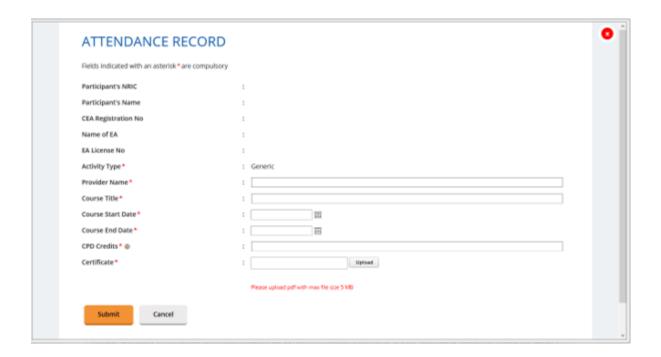


Figure 8: Submit New Attendance – Individual Generic Competencies Course

Submission (Salesperson)

To update the attendance record:

- 1. Key in the course provider's name in the text box provided.
- 2. Key in the course title in the text box provided.
- 3. Fill in the course start date, course end date and CPD Credits.
- 4. Upload the course certificate. Please upload PDF file only with a max file size of 5MB.
- 5. Click Submit once you have updated all the fields. There will be a pop-up notification informing that the attendance has been submitted successfully.

The new attendance record submitted will be displayed in the table as shown in Figure 9 with the status **"Pending Approval"**. The status will be changed to **"Pending"** after approval by your KEO. You can delete the record within <u>3 calendar days</u> when the status is on "Pending" or "Pending Approval". After 3 calendar days, "Pending" records will be

changed to "Completed" and CPD credits will be recognized towards your CPD requirement fulfilment.

Generic Competencies courses submission that is rejected by KEO will have the Rejected-KEO status.

Description of status

- Pending: The attendance record requires a 3 days lag time before the submission status is changed to Completed and calculated towards the salesperson's records.
 The Generic Competencies course attendance is being submitted by KEO/ KEO Authorized User, or by salespersons.
- Pending Approval: Generic Competencies courses submission that is pending approval from KEO
- **Rejected KEO:** Generic Competencies courses submission that is rejected by KEO
- **Completed:** Submission that is approved by KEO both Professional Competencies and Generic Competencies

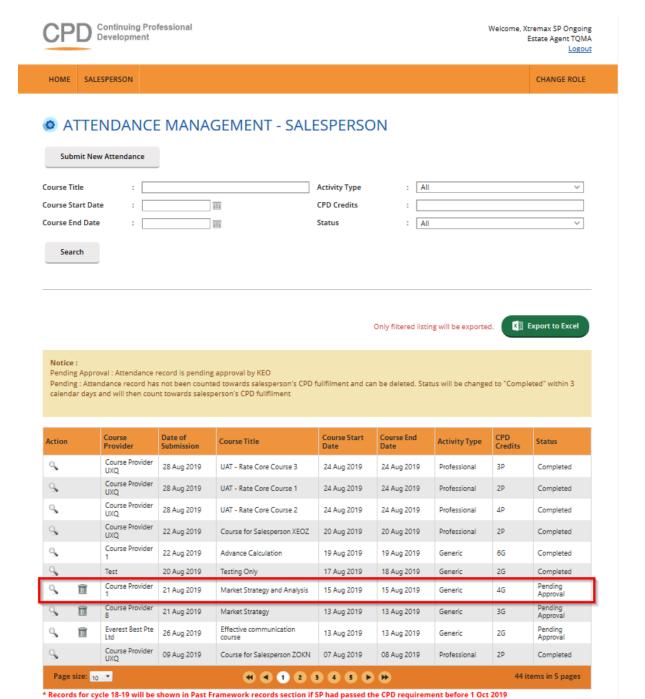


Figure 9: Attendance Record List

3.2 View Attendance Record

To view the record, click on the \P icon beside the record. The attendance record pop up will appear as shown in Figure 10.

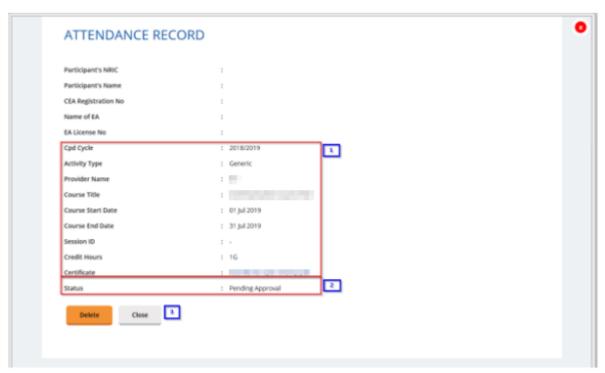


Figure 10: View Attendance Record

Description:

1. Attendance record details

Contains details of the attendance record that were submitted.

2. Status

You can only delete the records with "Pending" and "Pending Approval" status.

3. Close

Clicking Close will redirect you back to the Attendance Management page.

3.3 Search Attendance Record

You can look for your attendance record by using the following search filters under the Attendance Management page (refer to Figure 11).

- Course Title
- Course Start Date
- Course End Date
- Activity Type
- Credit Hours
- Status

To search for a record, you may fill in at least one of the fields above.

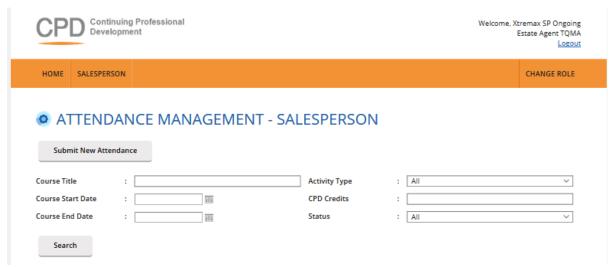


Figure 11: Search Attendance Record

3.4 Delete Attendance Record

Deleting attendance record can only be done for record(s) that are in **"Pending Approval"** or **"Pending"** status. To delete the attendance, click on the icon beside the record.

3.5 Export Attendance Record

To download a report of your attendance records, click the **Export to Excel** button on the right-hand corner of the table (refer to Figure 12). The attendance file will be downloaded in .xls format

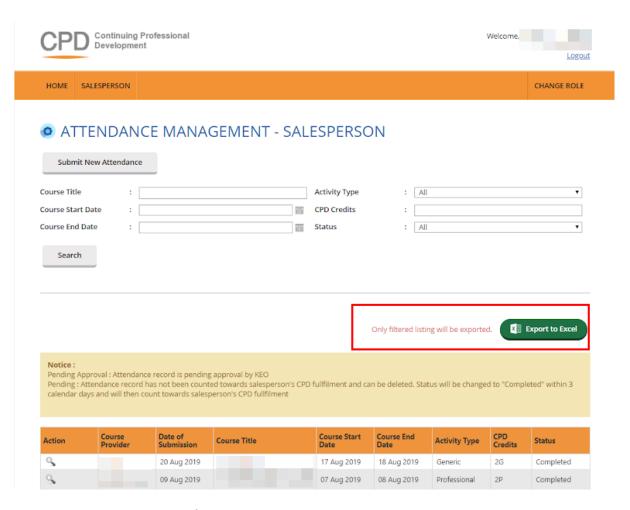


Figure 12: Export Attendance Record

To export a selected record(s), you may proceed to search the record(s) by using the filter in section 3.1.3. and then clicking on the Export button shown in Figure 12.

3.6 View Past Attendance

Clicking on "View Past Attendance" allows salesperson to view past CPD records from the past CPD framework.

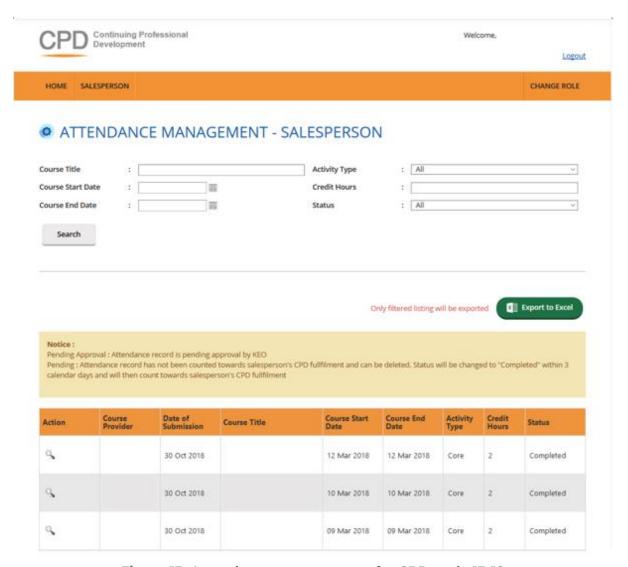


Figure 13: Attendance management for CPD cycle 13-18

To download a report of your Past Framework attendance records, click the **Export to Excel** button on the right-hand corner of the table which show in Figure 14. The attendance file will be downloaded.

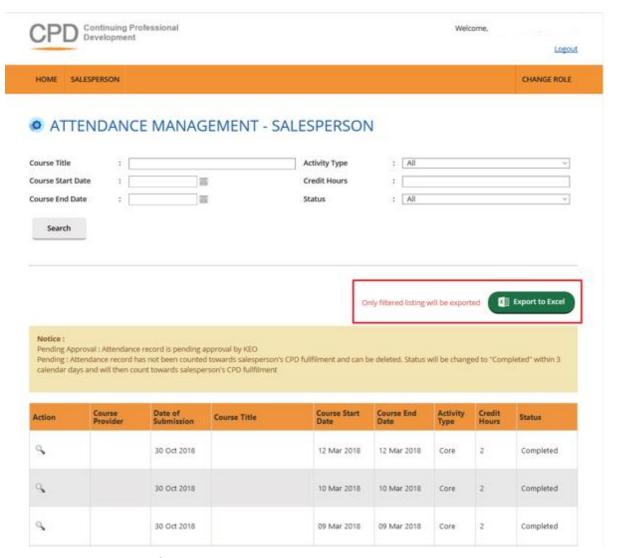


Figure 14: Export attendance record to excel

4 CPD Requirements Monitoring

This function is for you to track your CPD requirement fulfilment for a particular CPD cycle. Click on the Salesperson >> CPD Requirement Monitoring.



Figure 15: Salesperson – CPD Requirement Monitoring

4.1 CPD Cycle Period

Salesperson can search the record by CPD Cycle period or status. Figure 16 shows the drop down for the CPD cycle period.

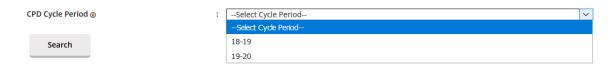


Figure 16: CPD Cycle Period

CPD requirements monitoring module will reflect the number of Credit hours (Professional Competencies and Generic Competencies) you are required to achieve in one CPD cycle.

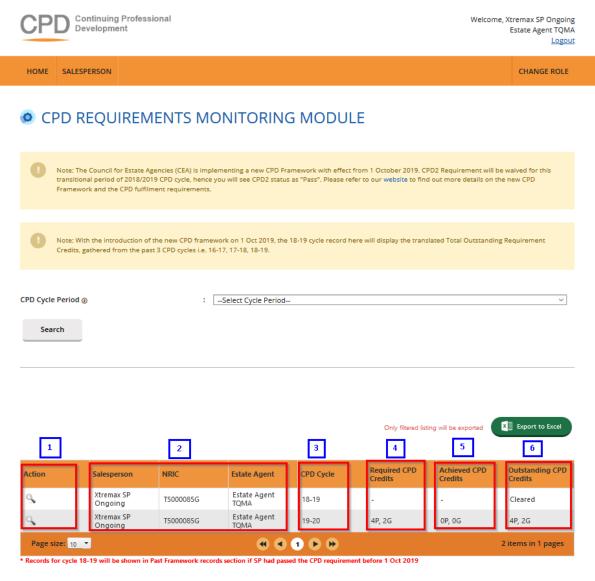


Figure 17: Requirement monitoring module

Definitions

1. Action (\$\sqrt{\$})

To view the details of the attendance records for a particular CPD Cycle.

2. Personal Details

Your name, NRIC, and registration number will be displayed.

3. CPD Cycle

Define the particular CPD Cycle (i.e. from 1 Oct of a calendar year to 30 Sep of the following calendar year).

4. Required CPD Credits

Number of professional competencies and generic competencies required for a particular CPD cycle.

Pls note that "Required CPD Credits" and "Achieved CPD Credits" will be a dash (-) for Salesperson with debt pool to fulfill. This is because Cycle 18-19 will reflect the number of credits required to fulfill debt pool for the past three cycles (Cycle 18-19, 17-18, 16-17).

5. Achieved CPD Credits

Total number of Professional Competencies and Generic Competencies credit achieved for a particular CPD cycle. This is based on the attendance submitted and successfully validated in the system.

6. Outstanding CPD credits

Shows the total credits remaining professional and generic competencies that a salesperson needs to complete for a particular CPD Cycle.

Pls note that Number of credits required to fulfill debt pool for the past three cycles will be converted and accumulated under "Outstanding CPD Credits" of 18-19 Cycle.

More information

With the introduction of the new CPD framework on 1 Oct 2019, the 18-19 cycle record here will display the translated Total Outstanding Requirement Credits, gathered from the past 3 CPD cycles i.e. 16-17, 17-18, 18-19.

"Required CPD Credits" and "Achieved CPD Credits" will be a dash (-).

Number of credits required to fulfill debt pool for the past three cycles will be converted and accumulated under "Outstanding CPD Credits" of 18-19 Cycle.

Records for cycle 18-19 will be shown in "View Past CPD Requirement" if Salesperson passed the CPD requirement before 1 Oct 2019.

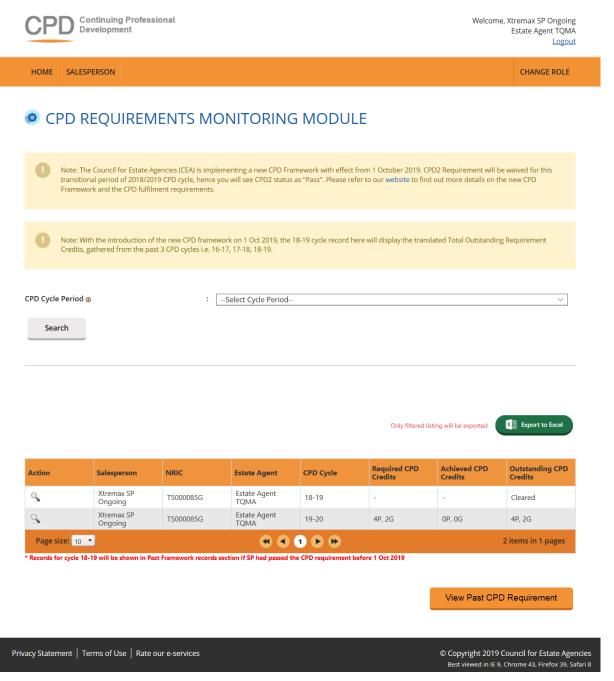


Figure 18: Requirement monitoring module

4.2 View Past CPD Requirement

Clicking on "View Past CPD Requirement" allows salesperson to view the CPD requirement fulfilment for a particular CPD cycle from the past CPD framework.

Salesperson is able filter the records by CPD Requirement Type, CPD Cycle Period and CPD Status.



Figure 19: View Past CPD Requirement Search Filter

(Sections 4.2.1 to 4.2.3: Refresher information on the old CPD framework for reference, when viewing past framework records.)

4.2.1 CPD 1 Requirement

CPD 1 Requirement is the number of Credit Hours (i.e. Core, Non-Core, Total) you are required to achieve in one CPD Cycle.

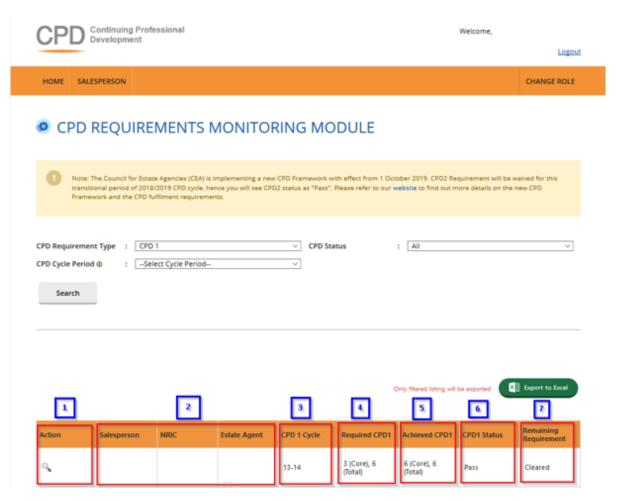


Figure 20: View Past Attendance - Requirement Monitoring Module - CPD 1

Definitions

1. Action (^S)

To view the details of the attendance records for a particular CPD 1 Cycle.

2. Personal Details

Your name, NRIC, and registration number will be displayed.

3. CPD 1 Cycle

Define the particular CPD 1 Cycle (i.e. from 1 Oct of a calendar year to 30 Sep of the following calendar year).

4. Required CPD 1

Number of core and total credit hours required for a particular CPD 1 cycle.

5. Achieved CPD 1

Number of core and total credit hours achieved for a particular CPD 1 cycle. This is based on the attendance submitted in the system.

6. CPD 1 Status

The current status of CPD 1 fulfilment for a particular CPD 1 Cycle

- Pass: The achieved credit hours met the required credit hours for the particular CPD 1 Year Cycle.
- Fail: The achieved credit hours did not meet the required credit hours by the end of the particular CPD 1 Year Cycle.
- Ongoing: The achieved credit hours have not met the required credit hours and the CPD 1 Cycle has not ended.
- Exempted: You are exempted from the CPD requirements for the particular CPD 1 Cycle.

7. Remaining Requirement

- NA: This means that the particular CPD 1 Cycle Fulfilment is not applicable for requirement calculation.
- Cleared: This status means the particular CPD 1 Cycle Fulfilment has been completed.
- Number of core and total hours remaining: This shows the remaining core and total credit hours that you need to complete for a particular CPD 1 Cycle.

(Sections 4.2.1 to 4.2.3: Refresher information on the old CPD framework for reference, when viewing past framework records.)

4.2.2 CPD 2 Requirement

CPD 2 Requirement is the number of course sessions required for each type of core courses (i.e. C1, C2, C3) that you are required to achieve in 3 consecutive CPD Cycles.

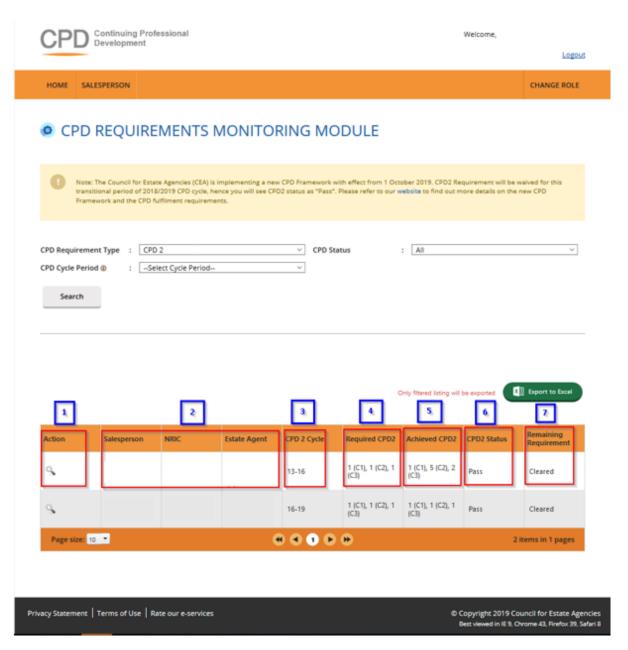


Figure 21: View Past Attendance - Requirement Monitoring Module - CPD 2

Definitions

1. Action (S)

To view the attendance submission details for a particular CPD 2 Cycle.

2. Personal Details

Your name, NRIC, and registration number will be displayed.

3. CPD 2 Cycle

Defined the 3 consecutive CPD Cycles applicable. E.g. "13-16" means that the 3 CPD cycles are the:

- a) 2013 CPD cycle (1 Oct 2013 to 30 Sep 2014)
- b) 2014 CPD cycle (1 Oct 2014 to 30 Sep 2015); and
- c) 2015 CPD cycle (1 Oct 2015 to 30 Sep 2016).

4. Required CPD 2

Total number of course sessions required for each Core Category (C1, C2, and C3) for a particular CPD 2 Cycle.

5. Achieved CPD 2

Total number of course sessions achieved for each Core Category (C1, C2, and C3) for a particular CPD 2 Cycle. This is based on the attendance submitted in the system.

6. CPD 2 Status

The current status of CPD 2 fulfilment for a particular CPD 2 Cycle

- Pass: The achieved course sessions met the required course sessions for each Core Category (C1, C2, and C3) for the particular CPD 2 Cycle.
- Fail: The achieved course sessions did not meet the required course sessions for each Core Category (C1, C2, and C3) by the end of the particular CPD 2 Cycle.
- Ongoing: The achieved course sessions have not met the required course sessions for each Core Category, however, the particular CPD 2 Cycle has yet to end.
- Exempted: You are exempted from the CPD requirements for the particular
 CPD 2 Cycle.

7. Remaining Requirement

- NA: This status means the particular CPD 2 Cycle Fulfilment for the Salesperson is not applicable for requirement calculation.
- Cleared: This status means the particular CPD 2 Cycle Fulfilment for the Salesperson has been completed.
- Number of sessions remaining (Core Category): This shows the remaining course sessions required for each Core Category that you need to complete for a particular CPD 2 Cycle.

(Sections 4.2.1 to 4.2.3: Refresher information on the old CPD framework for reference, when viewing past framework records.)

4.2.3 CPD Overall Fulfilment

CPD Overall is the overall achievement of CPD1 and CPD2 requirements in one calendar year.

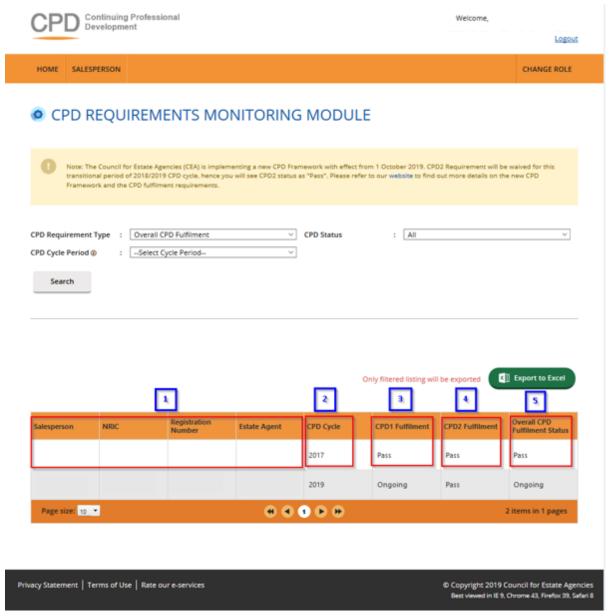


Figure 22: View Past Attendance - Requirement Monitoring Module – CPD Overall

Fulfilment

Definitions

1. Personal Details

Your name, NRIC, registration number, and the Estate Agent you are under will be displayed.

2. CPD Overall Cycle

A cycle is from 1 January to 31 December of a year, i.e. cycle 2017 means from 1 January 2017 – 31 December 2017.

3. CPD 1 Fulfilment

The status that is displayed because of checking all CPD1 requirements against all CPD1 requirements that are passed by the end of CPD overall cycle (end of year).

- Pass: You have achieved all your CPD1 requirements.
- Ongoing: You have not achieved all your CPD1 requirements while the CPD overall cycle has not yet ended.
- Fail: You have not achieved all your CPD1 requirements by the end of the year.
- Exempted: You are not required to fulfill your CPD1 requirements for the particular CPD1 cycle.

4. CPD2 Fulfilment

The status that is displayed because of checking all CPD2 requirements against all CPD2 requirements that are passed by the end of CPD overall cycle (end of year).

- Pass: You have achieved all your CPD2 requirements while the CPD overall cycle has not yet ended.
- Ongoing: You have not achieved all your CPD2 requirements while the CPD overall cycle has not yet ended.
- Fail: You have not achieved all your CPD2 requirements by the end of the year.
- Exempted: You are not required to fulfill the CPD2 requirements for the particular CPD2 cycle.

5. Overall CPD Fulfilment Status

Please refer to Table 1 for a visualization of the explanation below.

- If both CPD1 overall and CPD2 overall status = EXEMPTED, then CPD overall status = EXEMPTED.
- If either CPD1 overall or CPD2 overall status = FAIL, then CPD overall status = FAIL.
- If CPD1 or CPD2 status = ONGOING. This conditional will check for two things.
 1. If it is CPD1 overall status = ONGOING, then CPD overall status = ONGOING.
 2. If it is CPD2 overall status = ONGOING, it will check whether the current

CPD2 cycle is in the third year or not. If it is not in the third year, then CPD overall status = PASS despite CPD1 overall status = PASS or EXEMPTED. If it is in the third year, then it will follow the CPD2 overall status making the CPD overall status = ONGOING.

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Overall Fulfilment Cycle	CPD1	CPD2
Fail	Fail	Fail
Fail	Fail	Pass
Fail	Fail Ongoing	
Fail	Pass	Fail
Fail	Ongoing	Fail
Ongoing	Ongoing	Pass
Ongoing	Pass Ongoing	
Ongoing	Ongoing Ongoing	
Pass	Pass	Pass
Pass	Pass	Ongoing
1 033	1 033	Ongoing

5 Course Ratings

This function is for you to rate the Professional Competencies course that you have completed attendance. Click on the Salesperson >> Attendance Management.

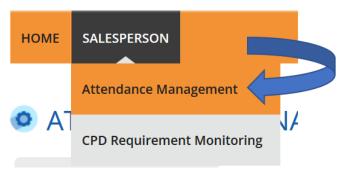


Figure 23: Rate Core Course - Attendance Management Module

Clicking on Stars icon in the Action column to rate the Professional Competencies course that have completed attended.

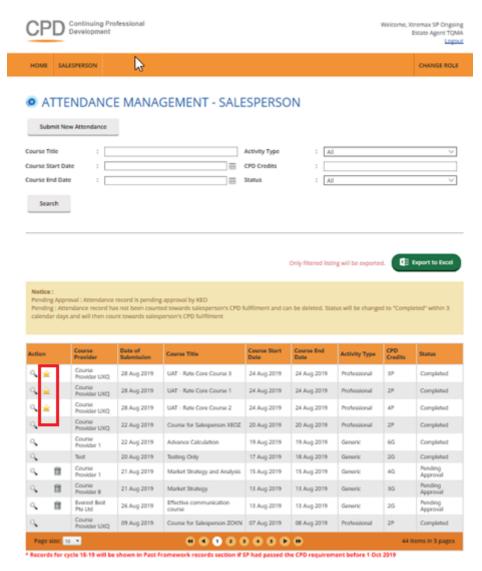


Figure 24: Rate Core Course: Attendance listing

Clicking on Stars icon the pop-up screen will show in Figure 25. The stars will turn yellow upon clicking which is shown at Figure 26.

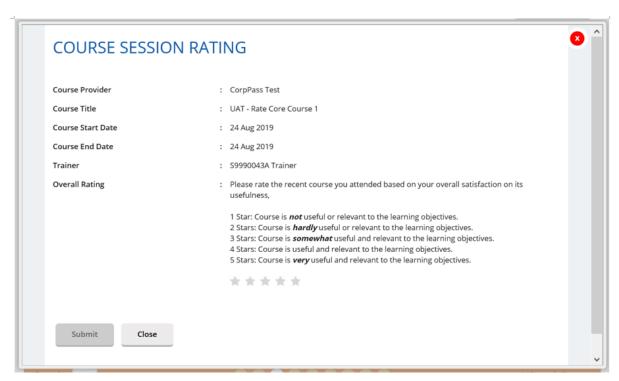


Figure 25: Rate Core Course: Course Session Rating

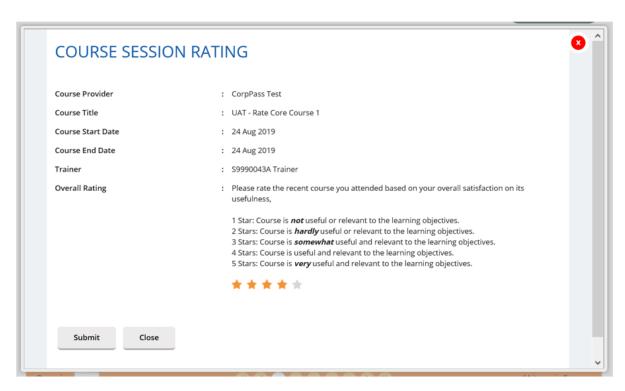


Figure 26: Rate Core Course: Stars turn yellow upon clicking

Clicking on Submit button and the successfully rating message will display which is show at Figure 29.

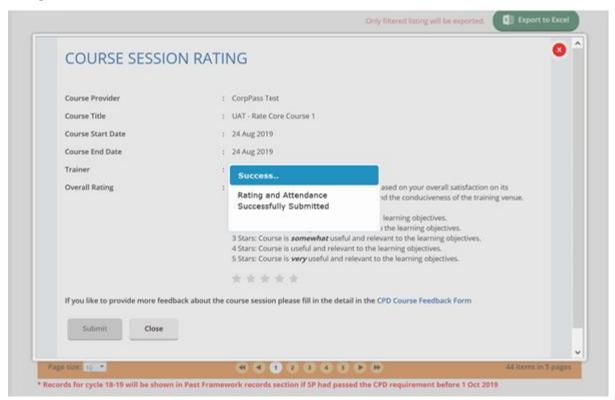


Figure 27: Rate Core Course: Successfully rating message

Salesperson are only allowed to rate the course once. Once the rating is given, salesperson is not able to see the star icon in the Action column for the particular course anymore. Refer to Figure 28.



Figure 28: Rate Core Course: Completed core course rating