Council for Estate Agencies (CEA)

Continuing Professional Development System

User Guide – Course Provider

W.e.f. 1 Oct 2019

(Version 4.0)

Document Change History

Version	Date	Description
1.0	23 Mar 2017	Initial Release
2.0	18 Aug 2017	Removed Submission of Attendance for Core CPD Activities by KEO/Authorised User and Salesperson
3.0	07 August 2018	Change figure 7 Change section 3.1.2 Search Course (CPD Topic to Course Category) Change figure 17 Change section 3.2.2 Search Session (Date & Time to Start Date Time and End Date Time) Change figure 25 Change figure 37 Change section 3.4.3 Session ID Search (To search session ID) Change figure 43
4.0	07 July 2019	Changes for the new CPD framework, wef 1 Oct 2019

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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 Course Provider

The Course Providers can use this system to:

- Add new courses;
- Manage courses;
- Submit attendance records for Professional Competencies Courses and course feedback records for completed courses; and
- Communicate with CEA administrators through an inbox correspondence system.

2 Login

2.1 Login functionality

You can login to the CPD System via www.cea.gov.sg/cpd. Click on the login tab on the right side of the top bar as shown below:

Figure 1: CPD Microsite – Login tab

Login option landing page will be displayed to choose to login with SingPass or CorpPass.

Figure 2: SingPass and CorpPass Login Option Landing Page

Choose CorpPass to login, and key in your UEN/Entity ID, CorpPass ID and Password as shown below:

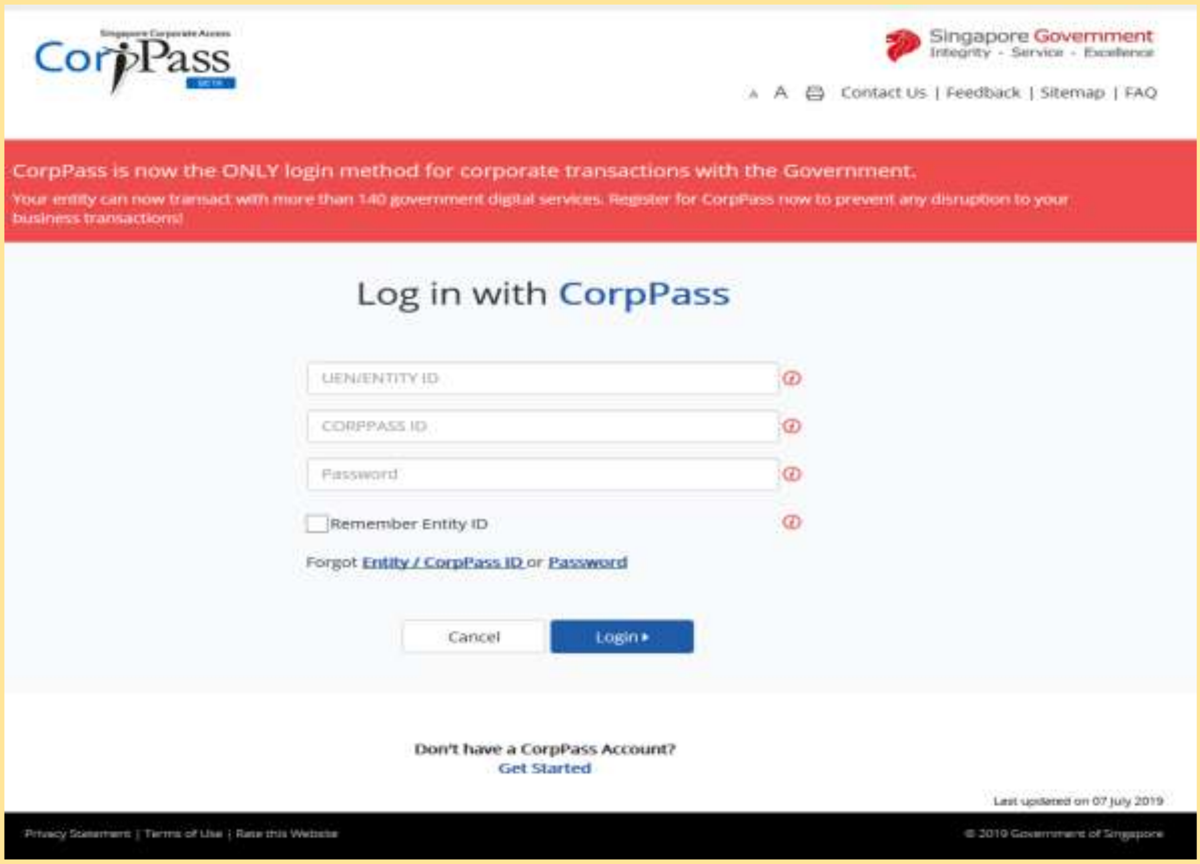


Figure 3: CorpPass Login Page

Once logged in, you will see the dashboard below if you have multiple roles in the CPD System e.g. as KEO/ Authorised User or Course Provider. Otherwise please refer to **Figure 4** for the dashboard that you will see. For multi-role users, please select the **"Course Provider"** tab if you wish to log in as a **Course Provider**. You will be directed to the dashboard shown in **Figure 5**.

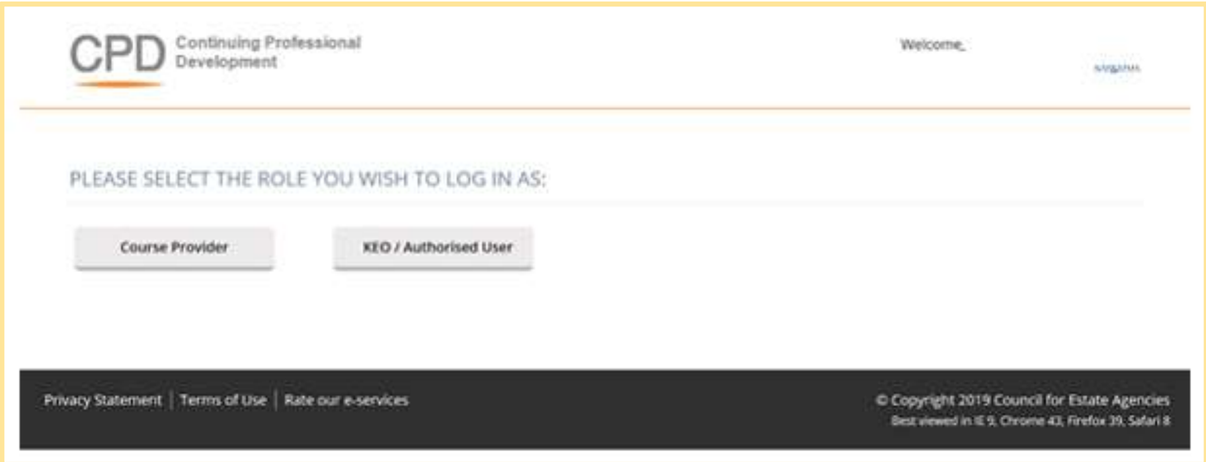


Figure 4: Multi Role dashboard

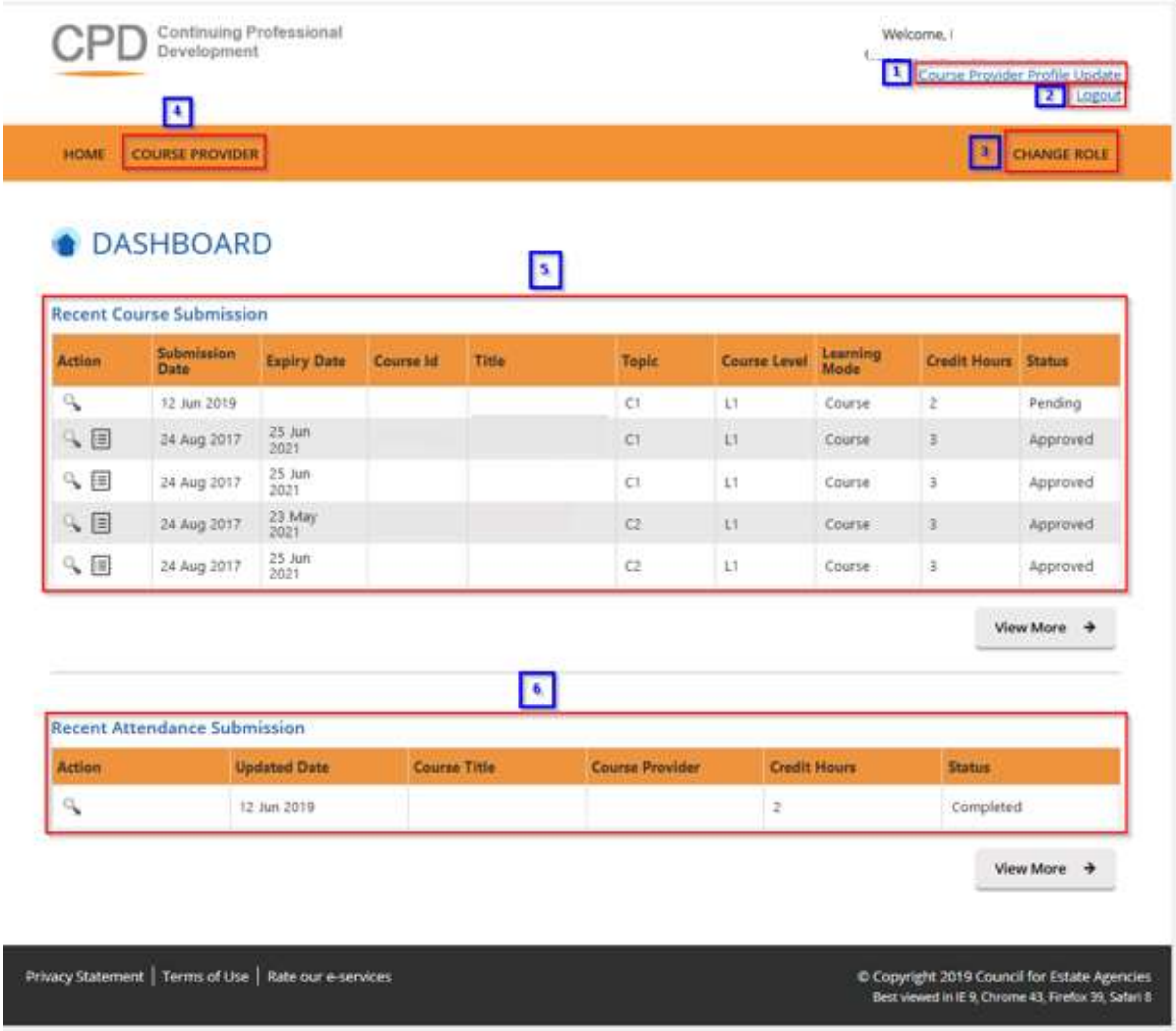


Figure 5: Course Provider Dashboard

Course Provider Profile Update (Refer to Figure 6)

For changes to the organization and contact person details, please email to the Council for Estate Agencies (CEA) directly. To update the file on "Record Keeping Procedure", file formats that can be uploaded are .pdf, .doc, .docx, .xls, .xlsx, and .pptx with the maximum size of 5 MB. By pressing Save, the changes will be saved in the system.

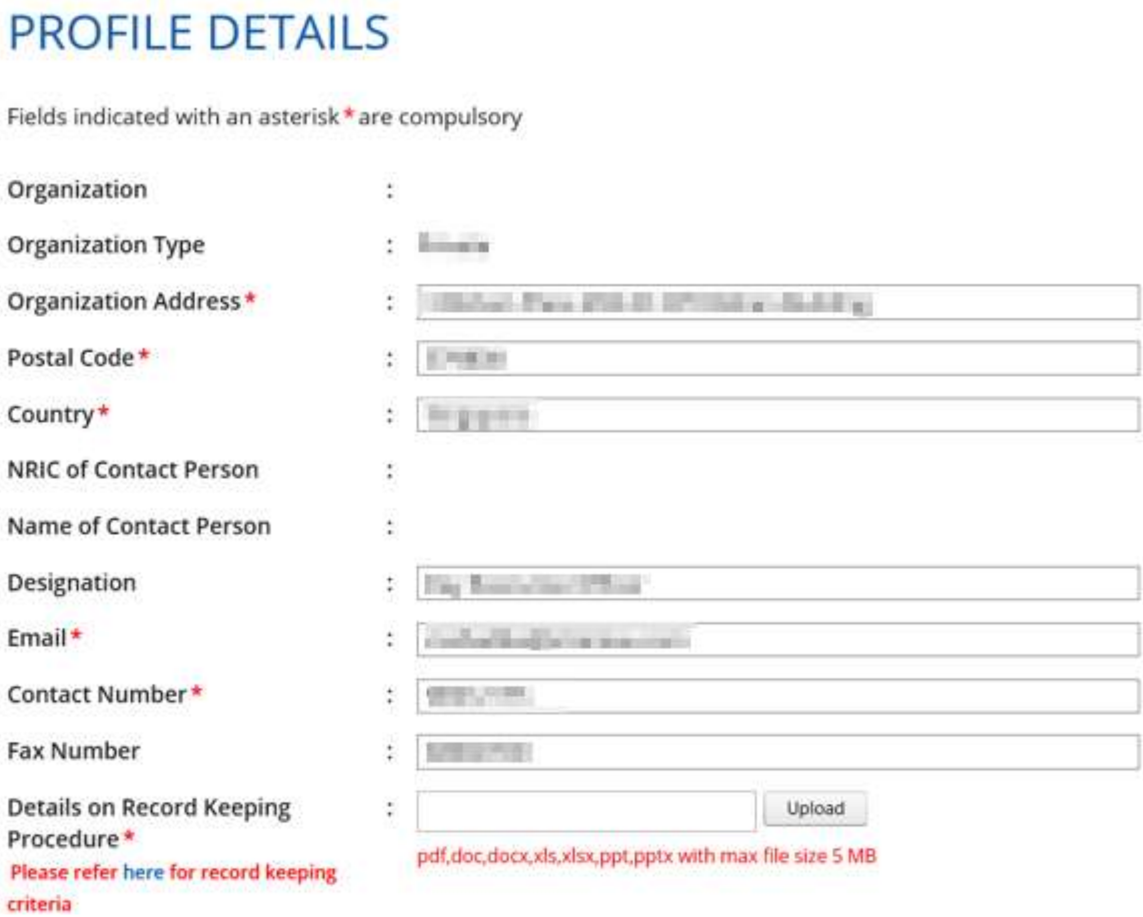


Figure 6: Course Provider Profile Update

1. **Logout (Refer to Figure 5)**

   Click this link to log out from the system.

2. **Change Role (Refer to Figure 5)**

   If you want to switch roles, click this tab and you will be redirected back to the multi roles dashboard.

3. **Course Providers (Refer to Figure 5)**

   Click this tab to check the relevant listing that are provided for Course Provider.

4. **Recent Course Submission (Refer to Figure 5)**

   Display of recent course submission in a list. By clicking View More, you will be redirected to the course management page for Course Provider.

5. **Recent Attendance Submission (Refer to Figure 5)**

   Display of recent attendance submission in a list. By clicking View More, you will be redirected to attendance management - Course Provider page.

3 Course Management

This chapter shows you how to manage the courses in the system. To access the Course Provider Management page, click **Course Providers >> Course Management.**

Figure 7: Course Providers tab drop-down menu: Course Management

You will be redirected to the Course Management page as shown in Figure 8.

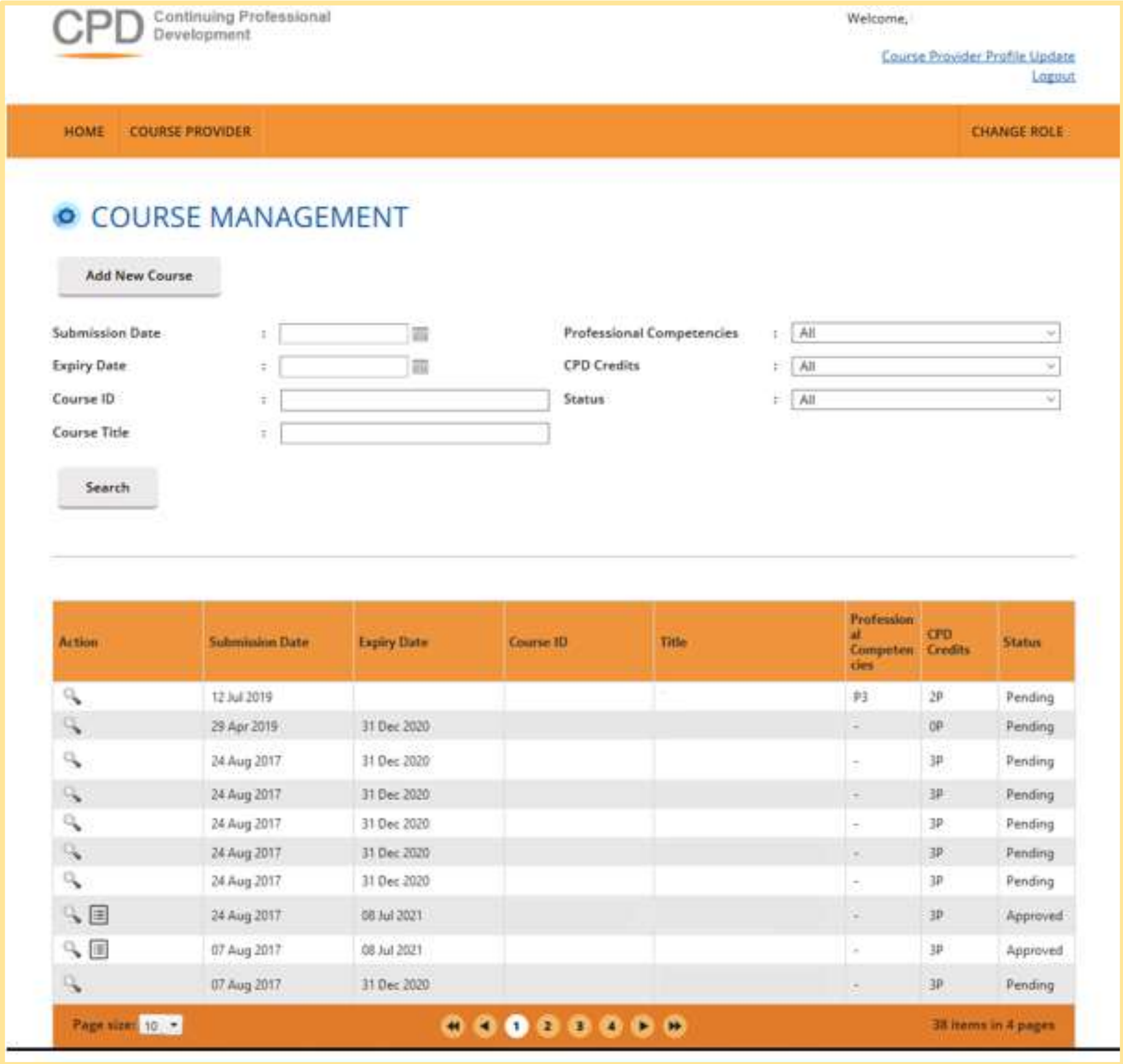


Figure 8: Course Management

3.1 Add new course

Add New Course

To create a new course, click on the Add Course button then follow these steps below:

1. Course Provider Details

   Check that the details provided are updated and correct. If updating is required, please refer to Course Provider Profile Update in Figure 5.

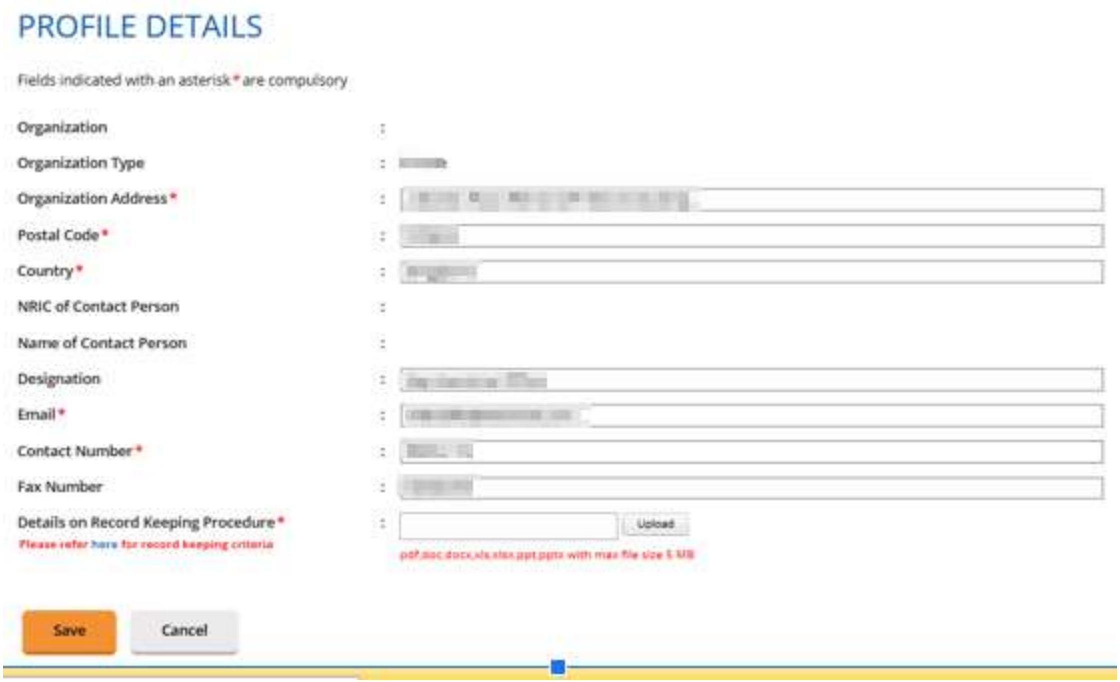


Figure 9: Course Provider Details

2. **Course Details**

   Click on Course Provider Details tab, fill in all the fields and upload the course materials. The file should be in .zip with the maximum size of 30 MB. Once done, click Save at the bottom of the screen. Tab with ✔ icon means that all the required information on that page is already completed, while the uncompleted information page is marked with ✖ icon.

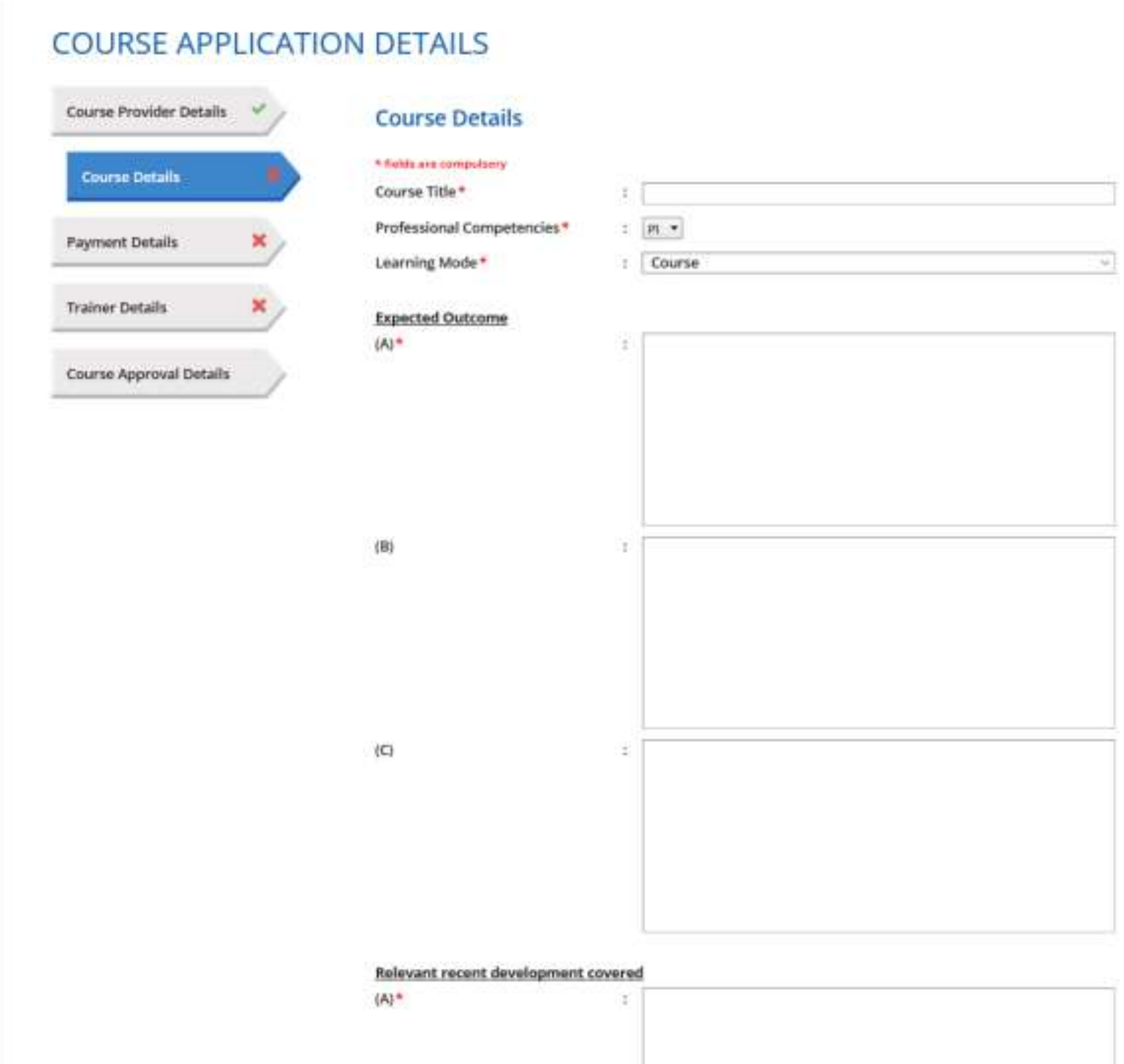


Figure 10: Create new course details

3. **Payment Details**

   Click on Payment Details tab, the payment mode will only in Internet banking. Fill in all the fields. Attach a copy of the transaction payment details. The allowed file formats are .jpg, .jpeg, .png, .doc, .docx, .xls, .xlsx, .pdf with a maximum file size of 5 MB. Once done, click Save at the bottom of the screen.

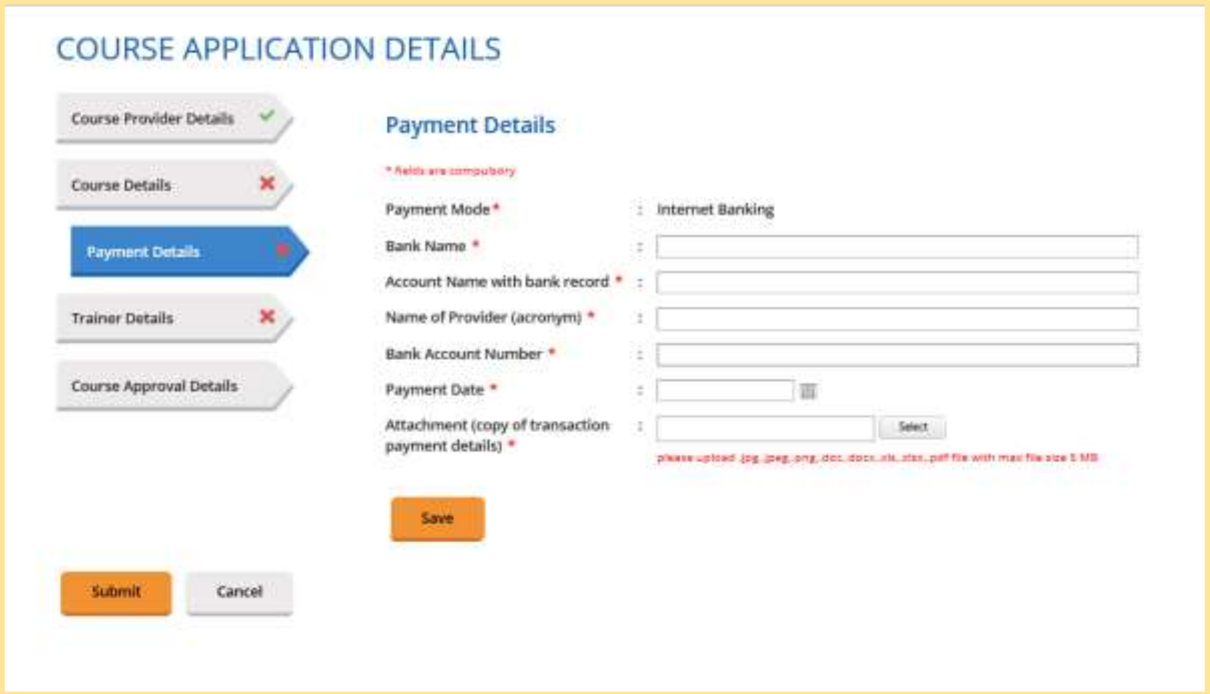


Figure 11: Course Details - Payment Details

4. **Trainer Details**

To add trainer, click on Trainer Details tab and follow these steps.

- <u>Select trainer</u>

  Choose the trainer from the drop-down list of trainers that had already been added.

Figure 12: Add Trainer

- <u>Add more than 1(one) trainer</u>

  If you want to add more than 1 trainer for this course, click on the “Add New Trainer” again. The maximum number of trainers allowed is 8 trainers.

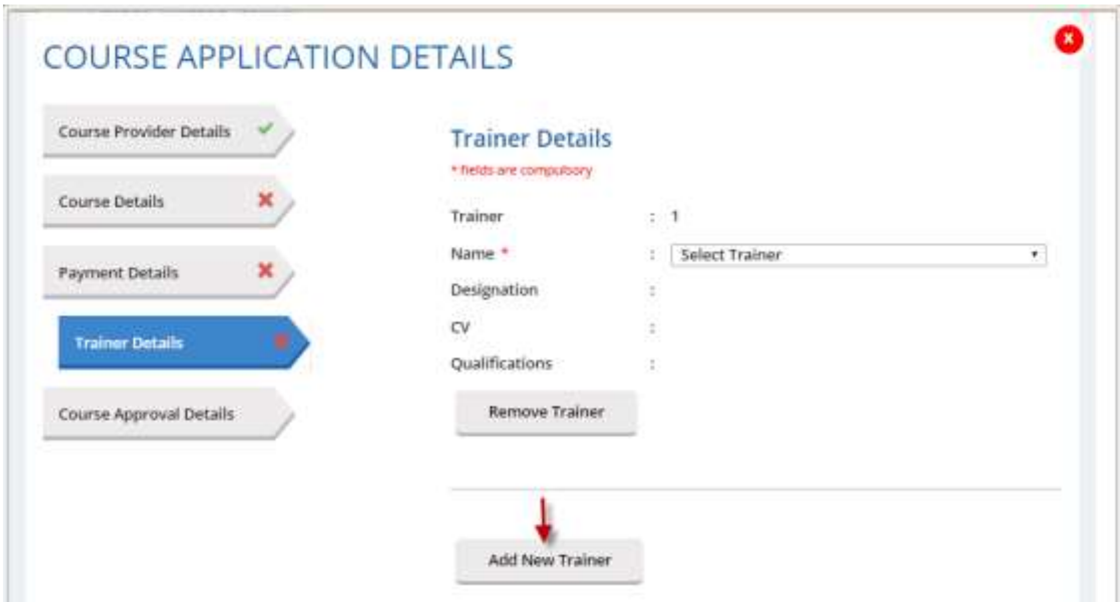


Figure 13: Add more than 1 (one) trainer

- Remove Trainer

  Click on Remove Trainer to remove trainer record from the course.

5. **Save**

   Click Save at the bottom of the pop-up to save the trainer details in the system. At this phase, the course approval status is Draft and can be edited. Please refer to Para 3.1.4 on steps to edit the course.

6. **Submit**

   Once you click Submit, the course submission will be sent to CEA for approval and the course info cannot be edited.

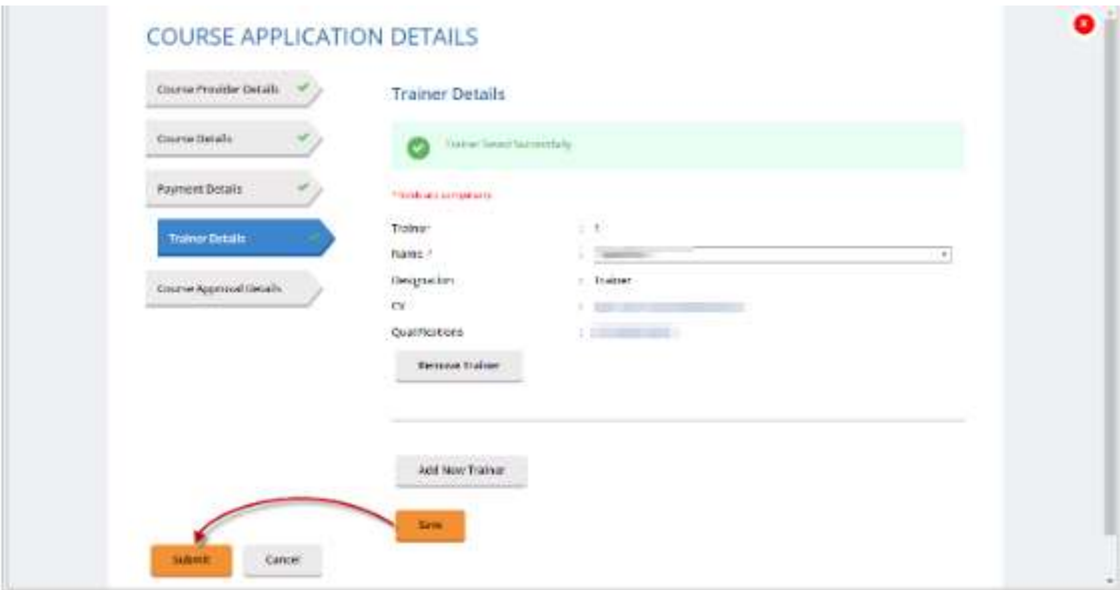


Figure 14: Trainer Details

When a new course is submitted, the approval status is indicated as **Pending.** It will be changed to **"Approved"** once the course is approved, or **"Rejected"** if it is rejected by CEA.

Figure 15: Course Approval Details for New Course Submission

The course record will be displayed at the course listing table as shown below.

Action	Submission Date	Expiry Date	Course ID	Title	Professional Competencies	CPD Credits	Status
	12 Jul 2019				P3	2P	Pending
	29 Apr 2019	31 Dec 2020			-	0P	Pending
	24 Aug 2017	31 Dec 2020			-	3P	Pending
	24 Aug 2017	31 Dec 2020			-	3P	Pending
	24 Aug 2017	31 Dec 2020			-	3P	Pending
	24 Aug 2017	31 Dec 2020			-	3P	Pending
	24 Aug 2017	31 Dec 2020			-	3P	Pending
	24 Aug 2017	08 Jul 2021			-	3P	Approved
	07 Aug 2017	08 Jul 2021			-	3P	Approved
	07 Aug 2017	31 Dec 2020			-	3P	Pending

Page size: 10 · 1 2 3 4 5 · 42 items in 5 pages

Figure 16: Course listing

3.2 Search course

Course Provider will be able to search for courses using the following filters:

- Submission Date
- Expiry Date
- Course ID
- Course Title
- Professional Competencies
- CPD Credits
- Status

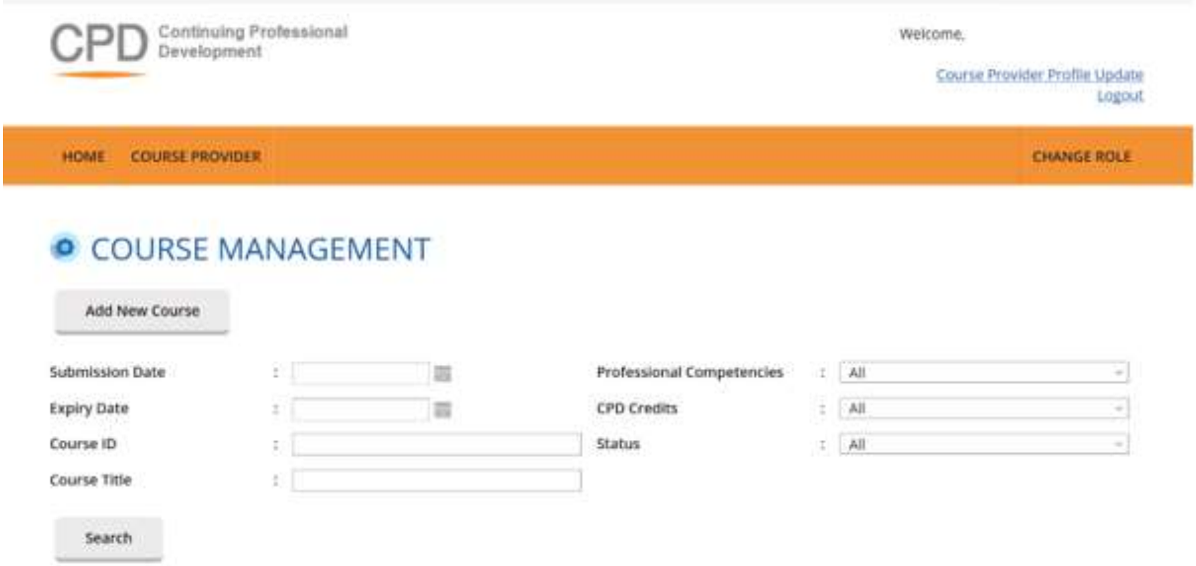
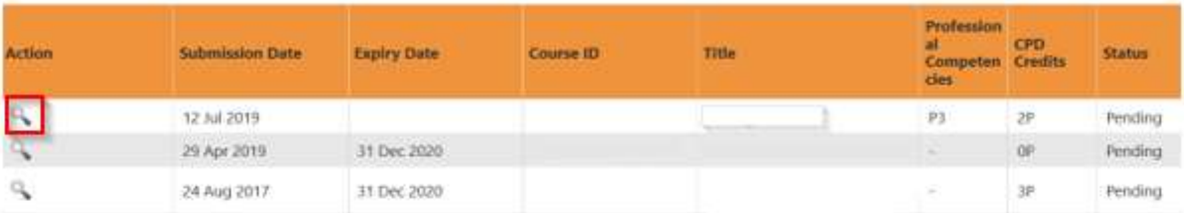


Figure 17: Course Management: Search form

Choose at least one filter in the search form and fill the field. Click on the Search button to get the results.

3.3 View course

Course Provider will be able to view their course details by clicking on icon .



Action	Submission Date	Expiry Date	Course ID	Title	Professional Competencies	CPD Credits	Status
	12 Jul 2019				P3	2P	Pending
	29 Apr 2019	31 Dec 2020			-	0P	Pending
	24 Aug 2017	31 Dec 2020			-	3P	Pending

Figure 18: Course Management: Listing Table

The course details will appear as shown in Figure 19:

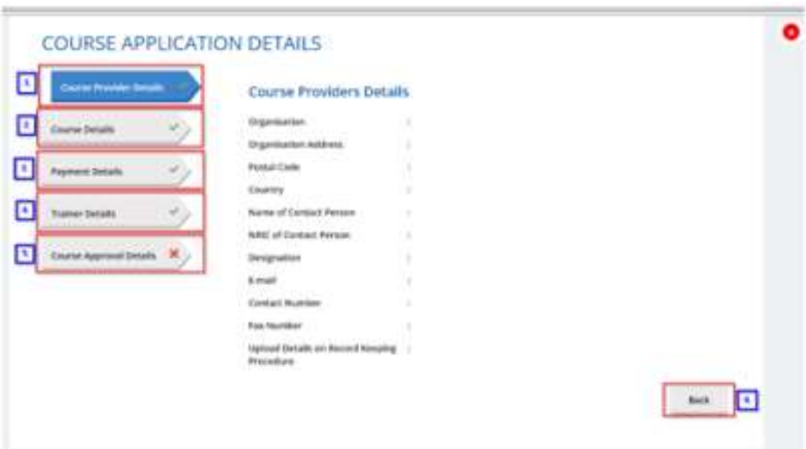


Figure 19: Course Management: Course details pop-up

1. **Course Provider Details**

Contains details of the course provider that submits the course.

2. **Course Details**

   Contains details of the course.

3. **Payment Details**

   Contains information about payment details of the course.

4. **Trainer Details**

   Displays trainer information who is conducting the course.

5. **Course Approval Details**

   Displays approval details of the course.

6. **Back**

   Click this button to close the pop-up or click on button at the top right side of the pop-up.

3.4 Editing Course

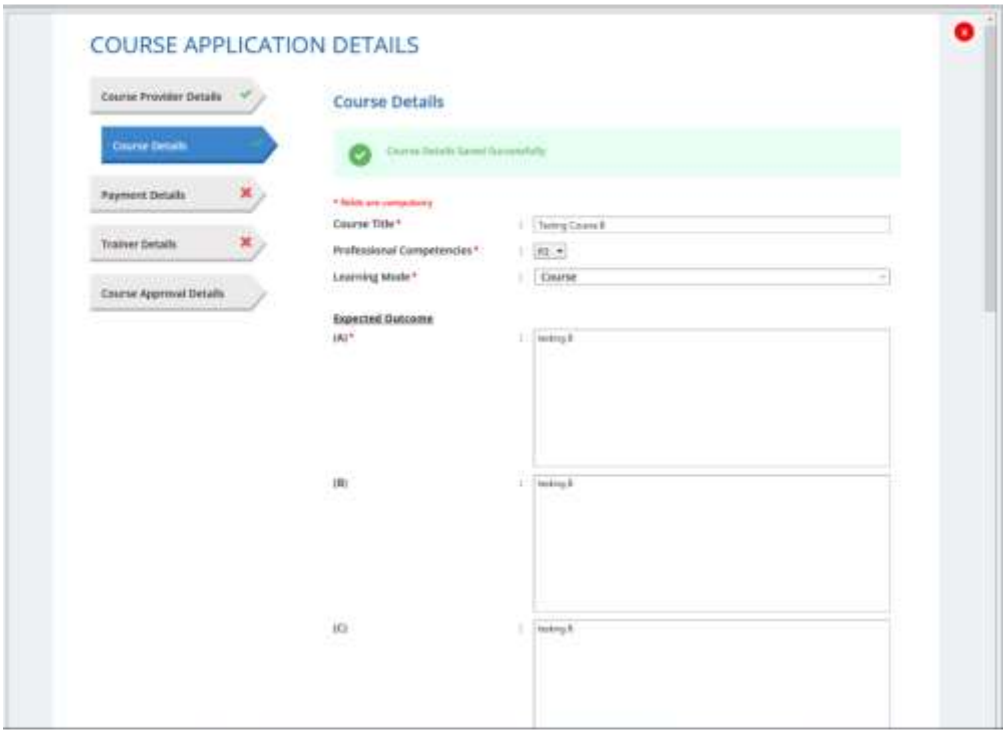


Figure 20: Edit course draft

1. **Edit course application details**

   Course Provider is able to edit Course, Payment and Trainer details.

2. **Save**

   Click Save at the bottom of the pop-up to save the course details.

3. **Submit**

   Once you click Submit, the course submission will be sent to CEA to get approval and the course cannot be edited.

4. **Delete Course**

   To delete course record, click on icon as shown in Figure 21. This action is only allowed for course with Draft status.

.

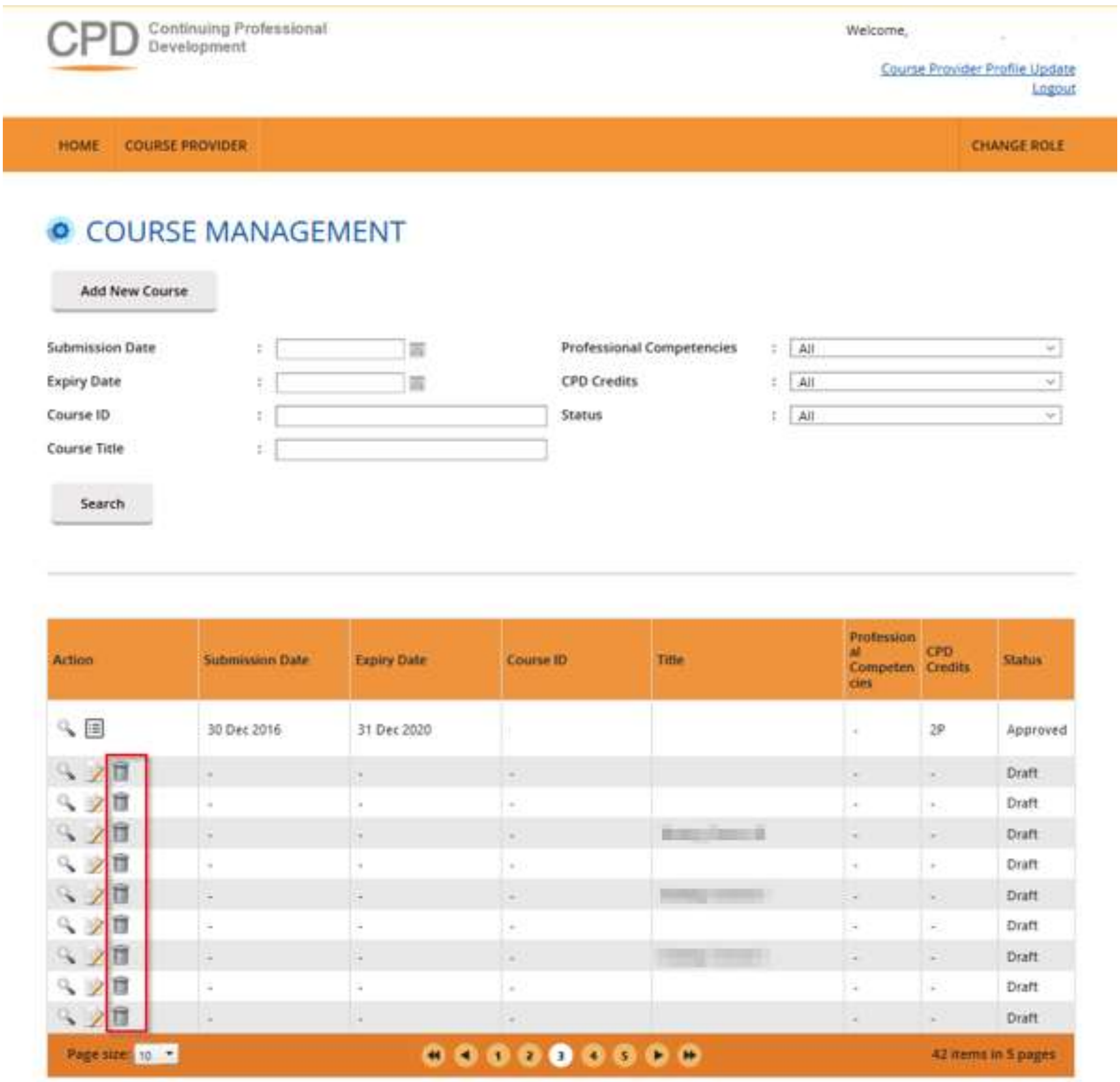


Figure 21: Draft Course List

Then confirmation pop-up will appear as shown below.

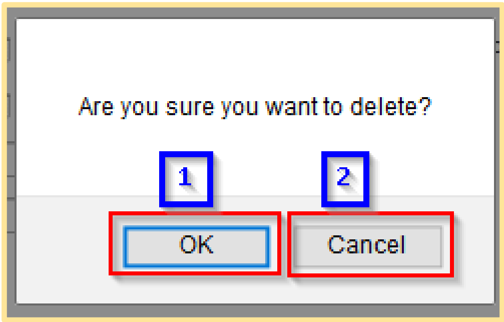


Figure 22: Delete course - Confirmation pop-up

1. **OK**

   Click this button if you want to delete the course record from the system.
2. **Cancel**

   Click this button if you do not want to delete the course, pop-up will be closed.

4 Session Management

On this page, Course Provider will be able to manage the session for each course that has been submitted. New sessions created will appear in the CPD Course Directory in the CPD Microsite, therefore sessions should be created before the conduct of the course.

4.1 Add new session

To create new session, click **Add New Session** button, then this pop-up will appear as shown in Figure 23.

Figure 23: Add New Session

All fields must be filled, and **Session ID will be auto generated by the system**. Once the respective session details are filled, click **Save** to save the session record into the system or **Cancel** to discard the session.

4.2 Search session

Course Provider will be able to search the course record by using the following filters:

- Session ID
- Venue Address
- Room
- Trainer
- Start Date Time
- End Date Time

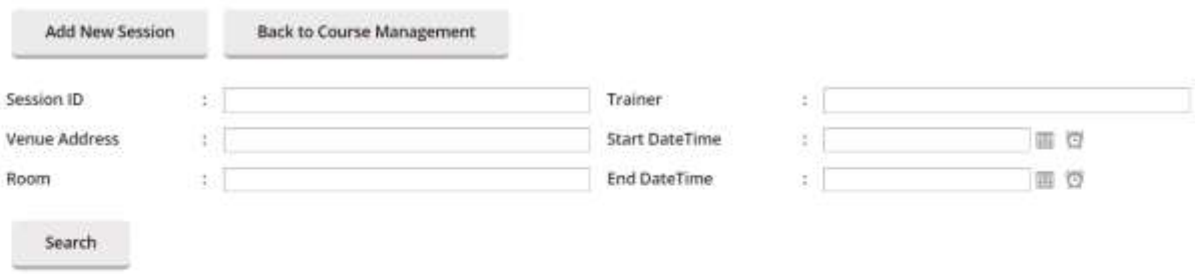


Figure 24: Session Management: Search form

1. **Search filters**

   Choose at least one filter in the search form, then fill in the relevant details in the field.

2. **Search**

   Click on the Search button to get search result.

4.3 Update session

Refer to the Figure 25, Course Provider can update session details by clicking on icon near the session record.

Figure 25: Update Session Details Icon

On the Session Detail pop-up, all fields can be updated, except for Session ID. Click **Save** once you are done.

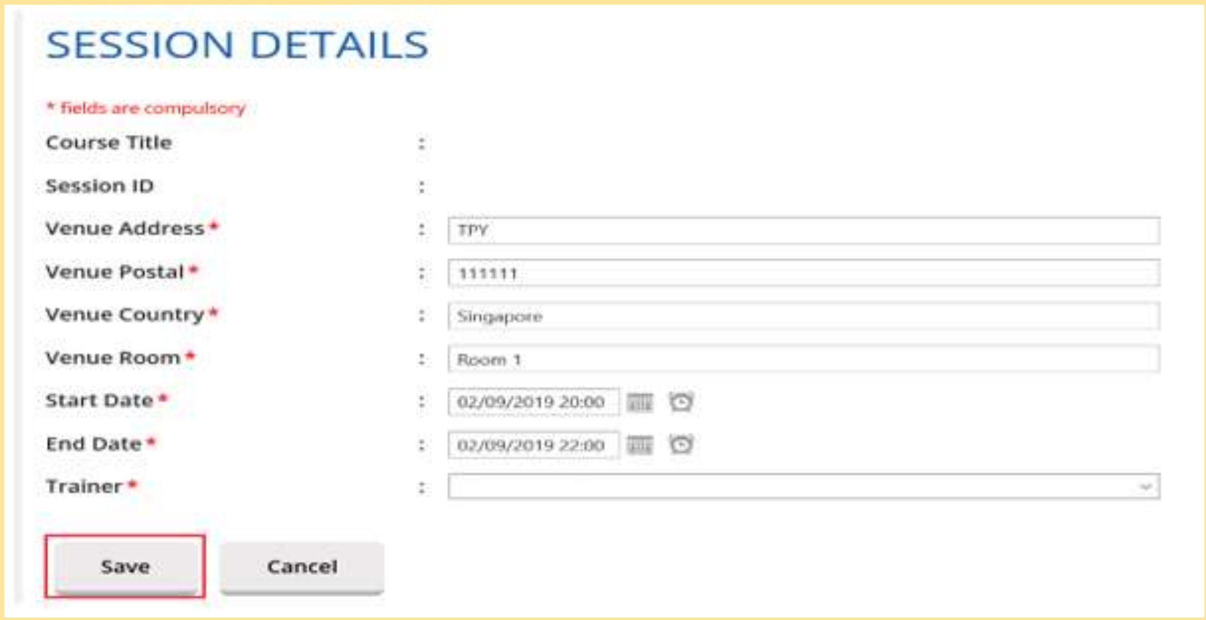


Figure 26: Update Session Details

4.4 Delete session

To delete the session record, click on icon beside the record. This action is only allowed for upcoming course session. Then confirmation pop-up will appear as below.

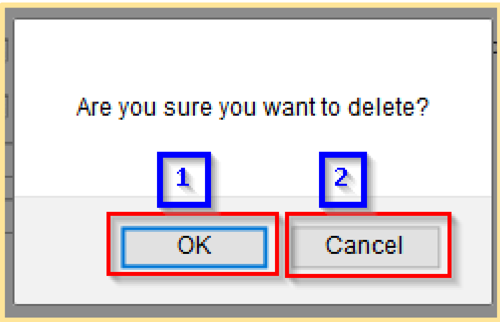


Figure 27: Delete session - Confirmation pop-up

1. **OK**

   Click this button if you want to delete the session record from the system.

2. **Cancel**

   Click this button if do not want to delete the session, then the pop-up will be closed.

4.5 Back to Course Management

Click this button to go back to Course Management page.

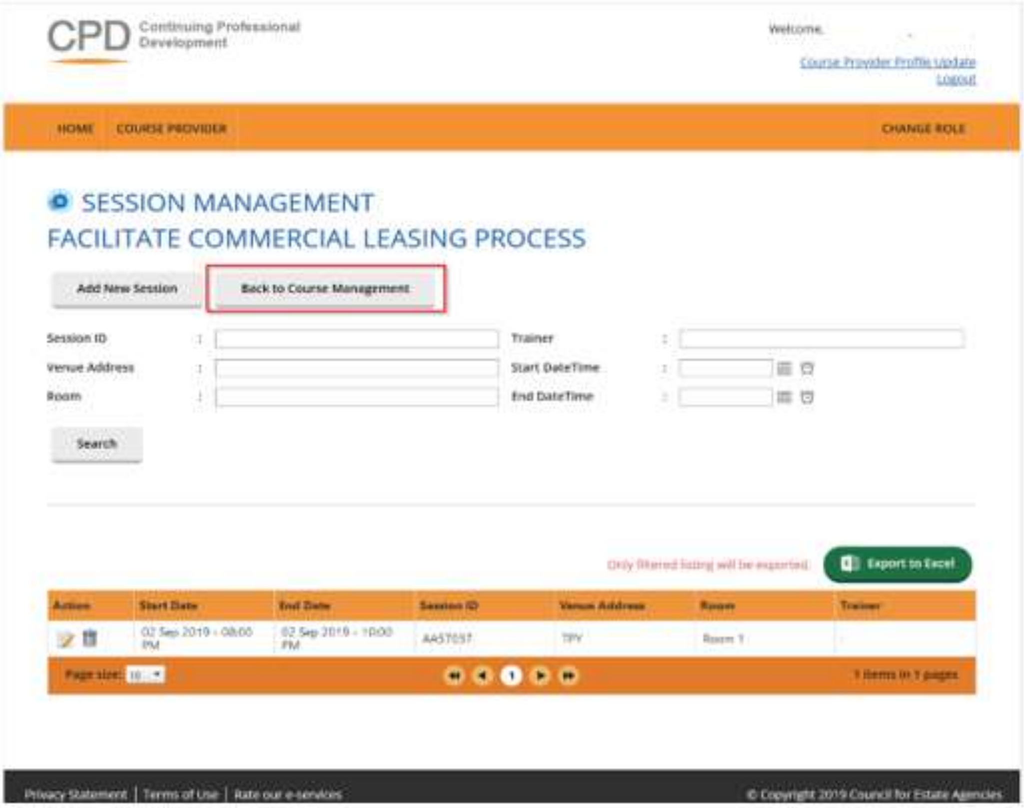


Figure 28: Back to Course Management

5 Trainer Management

This chapter shows you how to manage the records of the trainers in the system. To access the Trainer Management page, click Course Providers >> Trainer Management.

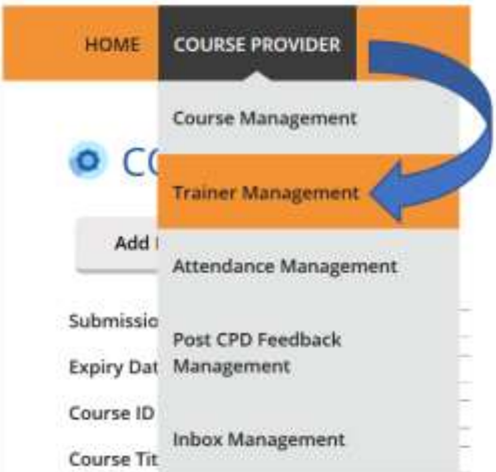


Figure 29: Course Providers tab drop-down menu: Trainer Management

You will be redirected to Course Management page as shown below.

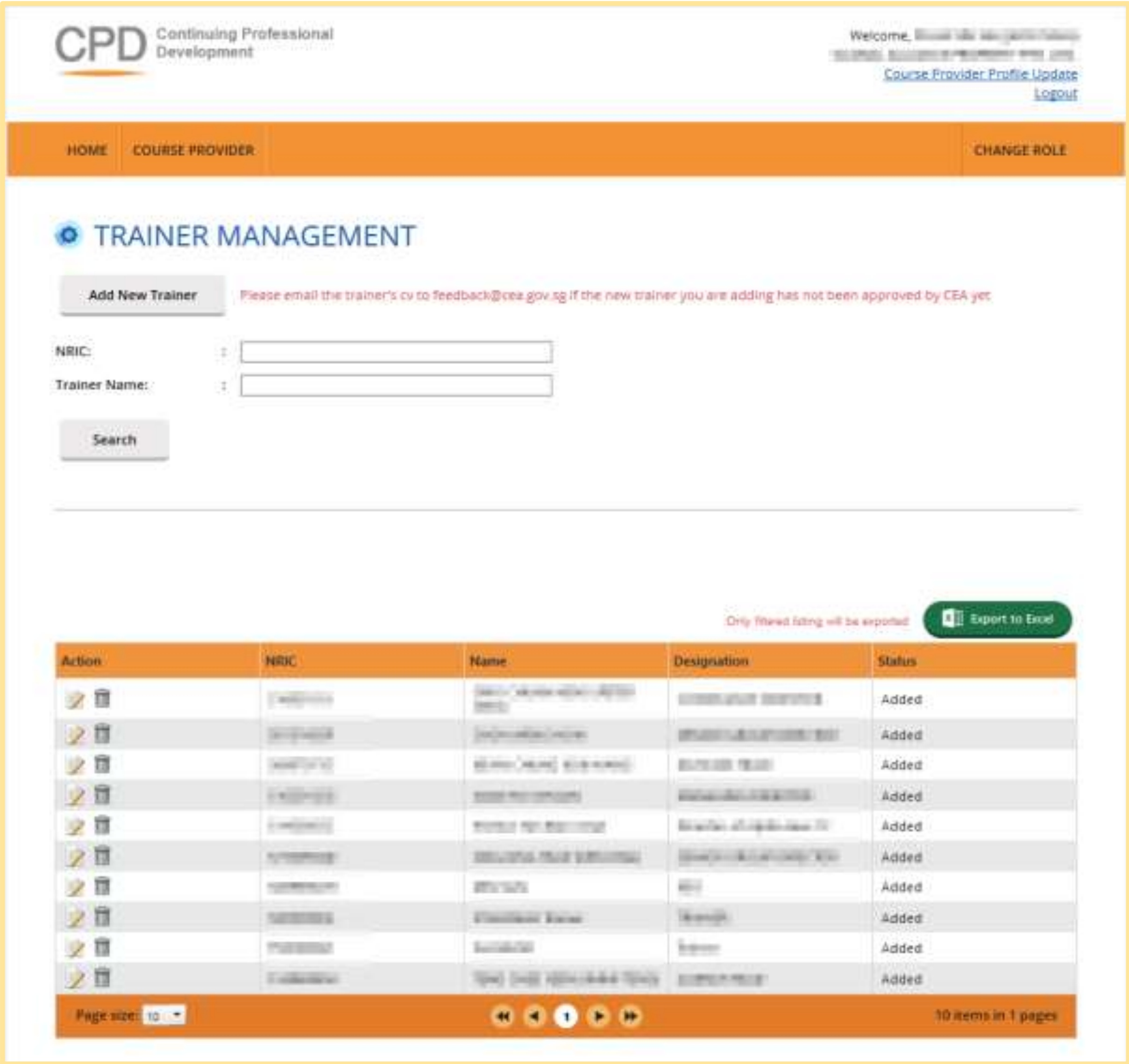


Figure 30: Trainer Management

5.1 Add new trainer

Click on the **Add New Trainer** button 

and you will see the following pop-up:

Figure 31: Create new trainer

All fields must be filled, and the attached document must be in one of the following formats: .pdf, .doc, .docx, .xls, .xlsx,.ppt, .pptx, .zip with maximum file size of 5 MB. Once done, click the Save and the new trainer will be displayed at the trainer list as shown below.

Figure 32: Trainer listing

5.2 Update trainer

Click on icon beside the record to edit the details, then you will see the trainer details pop-up.

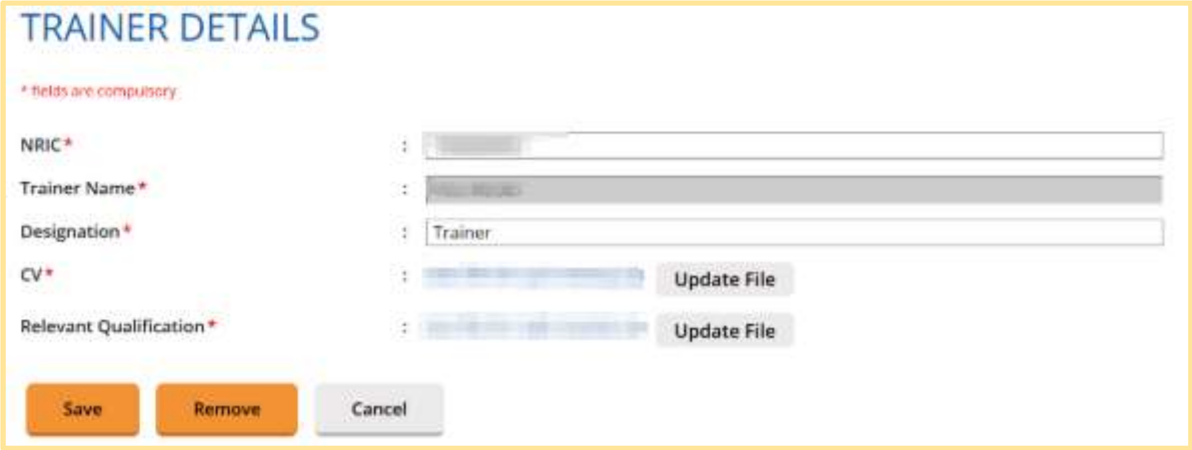


Figure 33: Update Trainer Details

On the Trainer Details pop-up, all fields can be updated, except for Trainer Name. Click Save once the fields are updated.

5.3 Remove Inactive Trainer

To set a trainer to be inactive (will be hidden from the course management trainer option), click on icon. At the pop up screen, click the Remove button. The trainer status will be changed to “Removed”. To add an inactive trainer back click on icon. At the pop-up screen, click “Add” button to make the trainer to be active again.

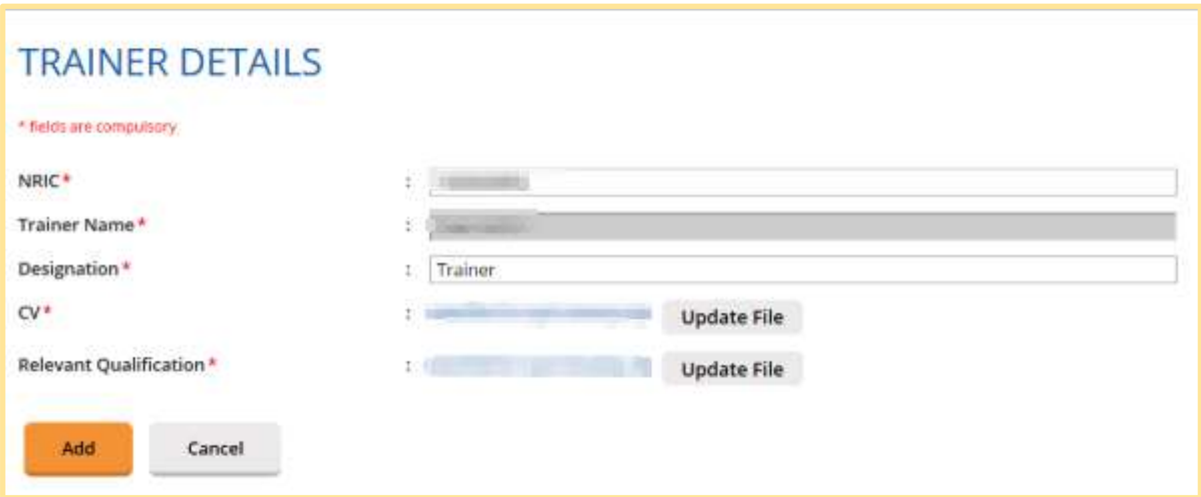


Figure 34: Add Inactive Trainer

5.4 Delete Trainer

To remove the trainer record, click on icon. Deletion can only be done to trainer that has not been assigned yet to any of the sessions. Trainer that have been scheduled to conduct courses cannot be deleted but can only be set to be inactive as stated in Para 3.3.3. above. The confirmation pop-up will appear as shown below.

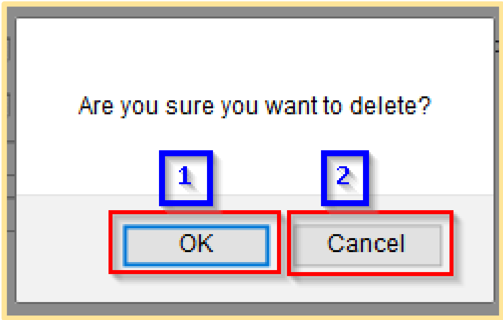


Figure 35: Remove trainer - Confirmation pop-up

1. **OK**

   Click this button if you want to delete the trainer record from the system.

2. **Cancel**

   Click this button if you do not want to delete the trainer, then the pop-up will be closed.

5.5 Search Trainer

Course Provider can search trainer record by using the following filters:

- NRIC
- Trainer Name

Figure 36: Search trainer

Fill in at least one of the search filters. Then click on the Search button to get the search result.

6 Attendance Management

This chapter shows you how to manage the attendance records in the system. To access the Attendance Management page, click **Course Providers** >> **Attendance Management.**

Figure 37: Course Providers tab drop-down menu: Attendance Management

You will be redirected to Attendance Management page as shown in Figure 38.

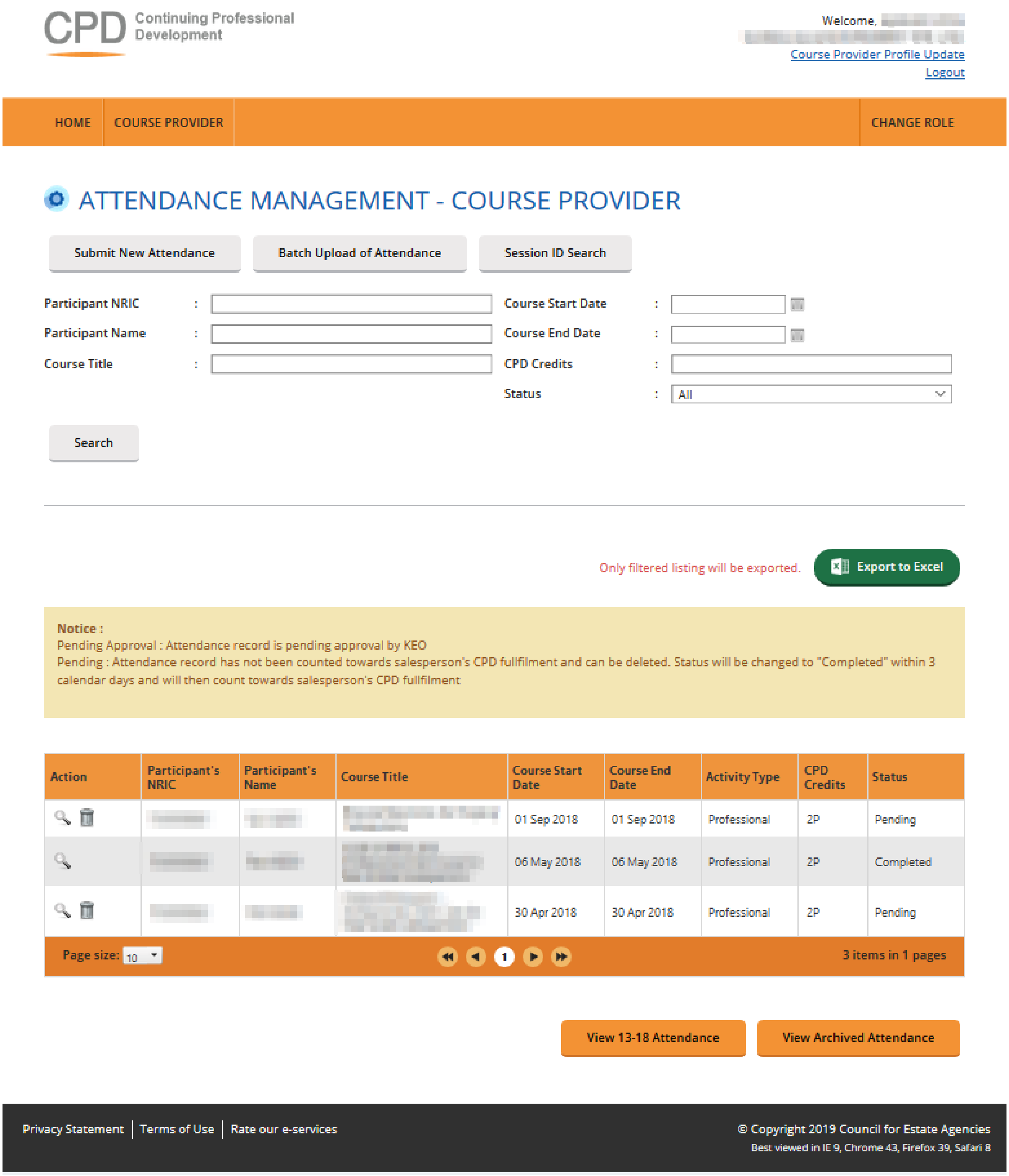


Figure 38: Attendance Management – Course Provider

6.1 Submit New Attendance

Course Provider is only required to submit attendance record for Professional Competencies CPD course only. To submit new attendance record, click on **Submit New Attendance** button and you will see the following pop-up:

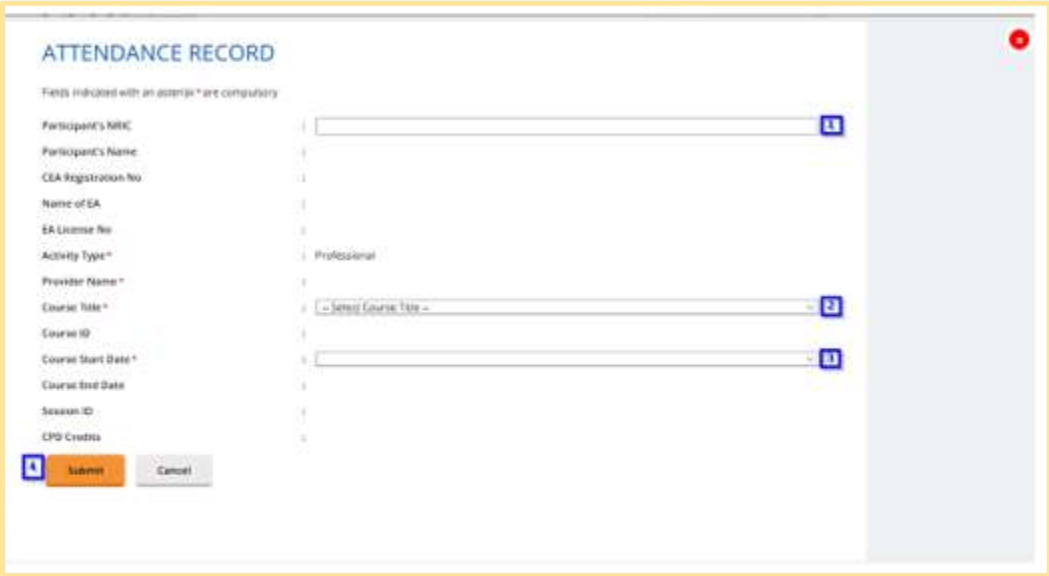


Figure 39: Submit New Attendance Records

Then follow these steps below.

1. First, fill in **Participant's NRIC.** The Participant's Name, CEA Registration No, Name of EA and License No fields will be auto populated.
2. Select **Course Title**. The Course ID will be auto populated.
3. Select **Course Start Date** from the drop-down menu. The Course End Date, Session ID and Credit Credits fields will be auto populated.
4. Click **Submit** once you are done with the attendance details.

The new attendance record will be displayed in the listing table as shown below.

Figure 40: Attendance Record List

6.2 Batch Upload of Attendance

To update multiple records, you can click Batch Upload of Attendance button, and the following pop-up will appear.

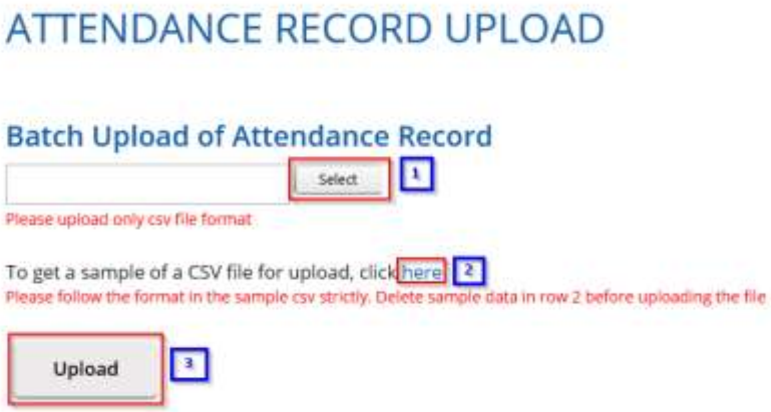


Figure 41: Batch Upload of Attendance

1. Select the attendance file that you wish to upload. Only file format CSV is allowed.
2. Click this link to download sample of CSV file if you do not have a CSV file for uploading. Please take note that it is recommended to use the template provided in the sample file, as different template (different column header) may result in uploading error.
3. Key in the required information in the CSV file. The date format should be DD/MM/YYYY. Click "Upload" to submit the file.

If all the records are successfully uploaded, success notification will appear and the pop-up will automatically be closed.

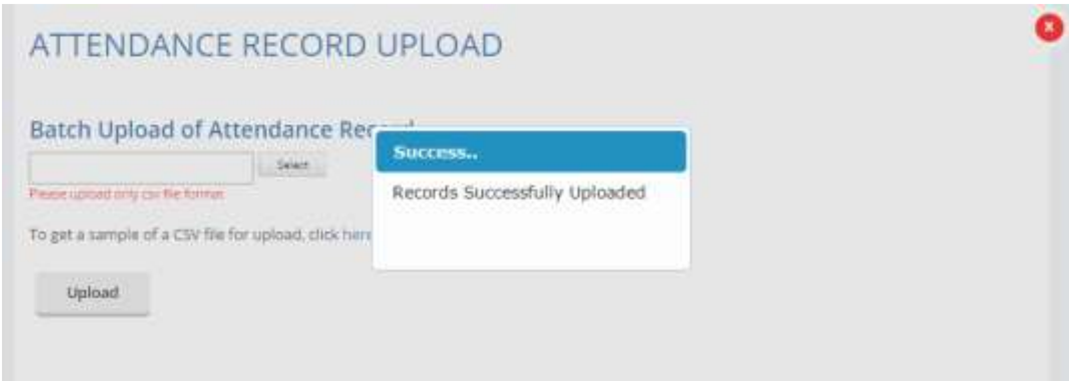


Figure 42: Batch Upload of Attendance Records – Success Notification

If some records fail to be uploaded, an example of the error notification would appear as shown below.

Figure 43: Batch Upload of Attendance Records – Error Notification Example

Please take note that if a row of record in the CSV file fails to be submitted, the rest of the records below it will not be submitted. Please repeat the above steps from steps 1 to 3 to upload the attendance records after correcting the error in the affected row and removing the submitted rows above it.

For further details on the error notifications and how to rectify it, please refer to session 9.

6.3 Session ID Search

Course Provider is also able to search the ID of the course session by clicking on Session ID Search tab. The Session ID Search pop-up will appear as shown below.

Figure 44: Session ID Search

To search session ID:

1. Select course title from the drop-down menu based on the selected Course Provider. The Course ID will be auto populated.
2. Select Course Start Date from the drop-down menu. The Course End date, Session ID and Credit Hours fields will be auto populated.

6.4 Search Attendance

Course Provider can search attendance record by using the following filters:

- Participant NRIC
- Participant Name
- Course Title
- Course Start Date
- Course End Date
- CPD Credits
- Status

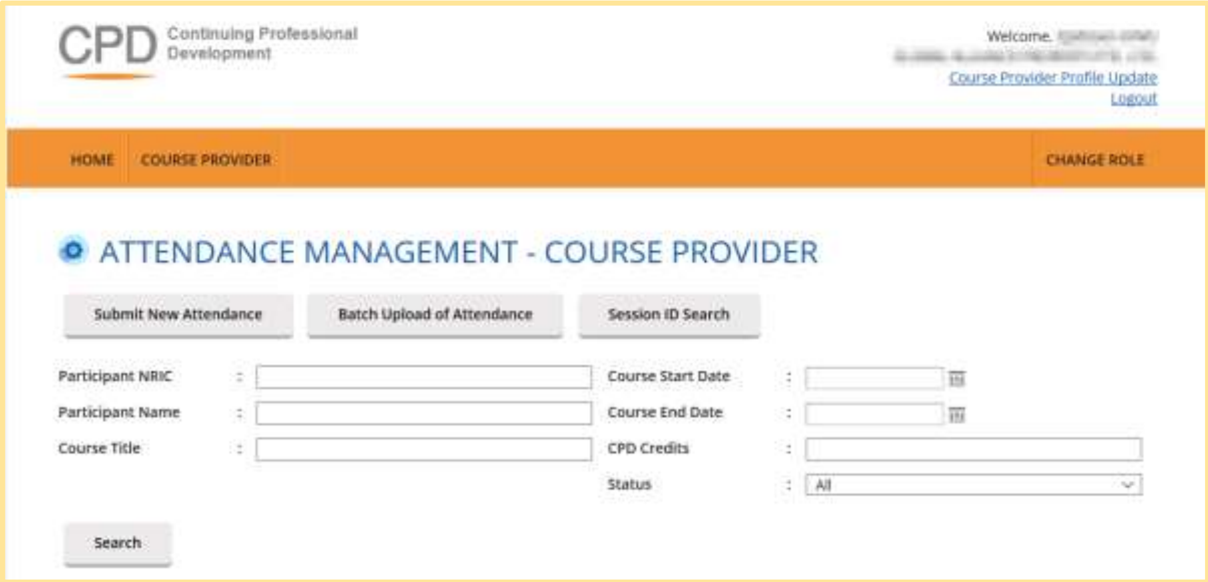


Figure 45: Search attendance

Fill in at least one of the search filters. Then click on the **Search** button to get the search result.

6.5 View Attendance

On this module, Course Provider is able to view the course details that have been submitted by the Course Provider. Click on icon beside the record. The course details will appear as shown below:

Figure 46: View attendance records

1. **Attendance record details**

   Contains details of the attendance record that is submitted by the course provider.

2. **Delete**

   Deleting this record is allowed only for attendance records with “Pending” status.

3. **Close**

   You will be redirected to the attendance monitoring management listing page.

6.6 Export Attendance Records

To export attendance record, click **Export to excel** button that is located above the table listing. The attendance file will be downloaded.

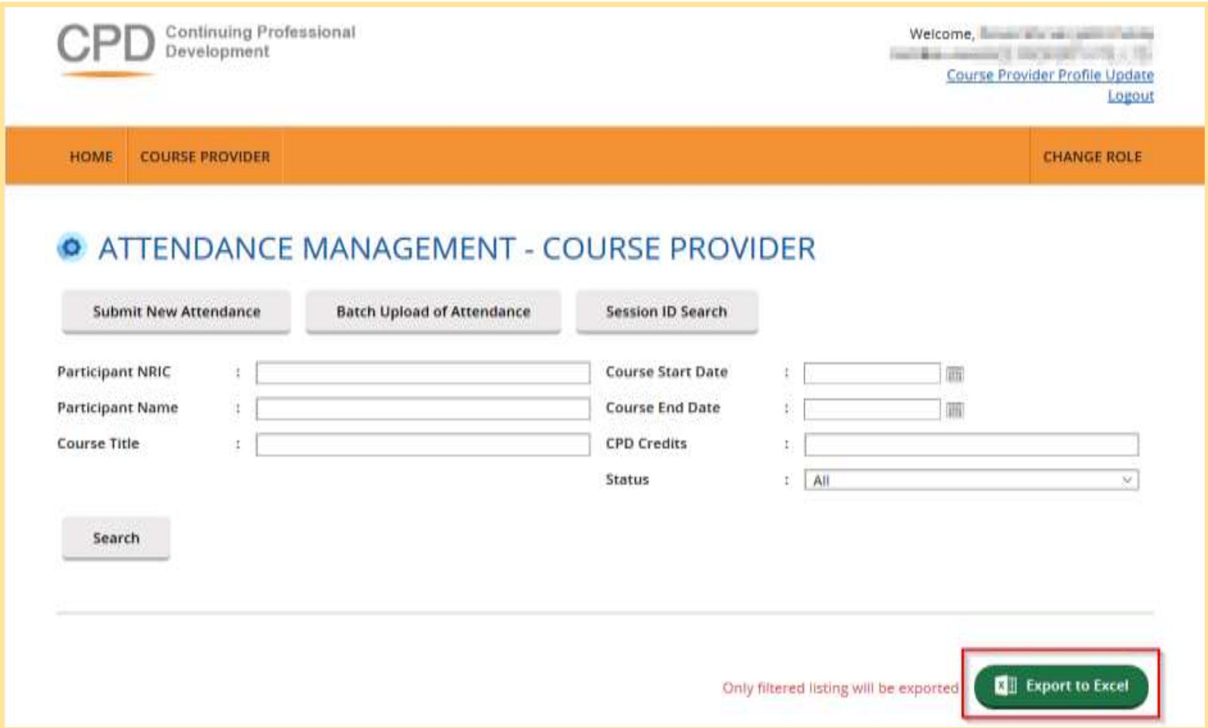


Figure 47: Export to Excel

6.7 Delete Attendance Records

Only attendance records with “Pending” status can be deleted. To delete, click on icon. Then the confirmation pop-up will appear as shown below.

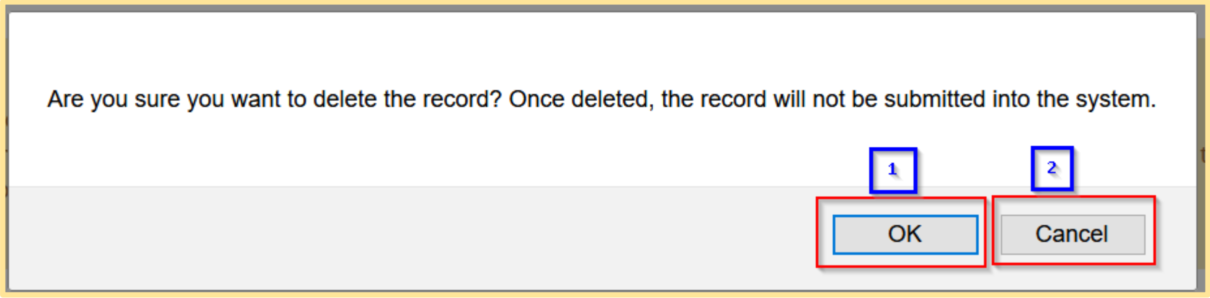


Figure 48: Delete Attendance Record - Confirmation pop-up

1. **OK**
   Click this button if you want to delete the attendance record from the system.
2. **Cancel**
   Click this button if you do not want to delete the attendance record, then the pop-up will be closed.

6.8 View 13-18 Attendance

Clicking on "View 13-18 Attendance" allows Course Provider to view the CPD record which were from cycle 13- 14, 14-15, 15-16, 16-17, 17-18 based on the old framework of 3 Core, 6 Total requirement.

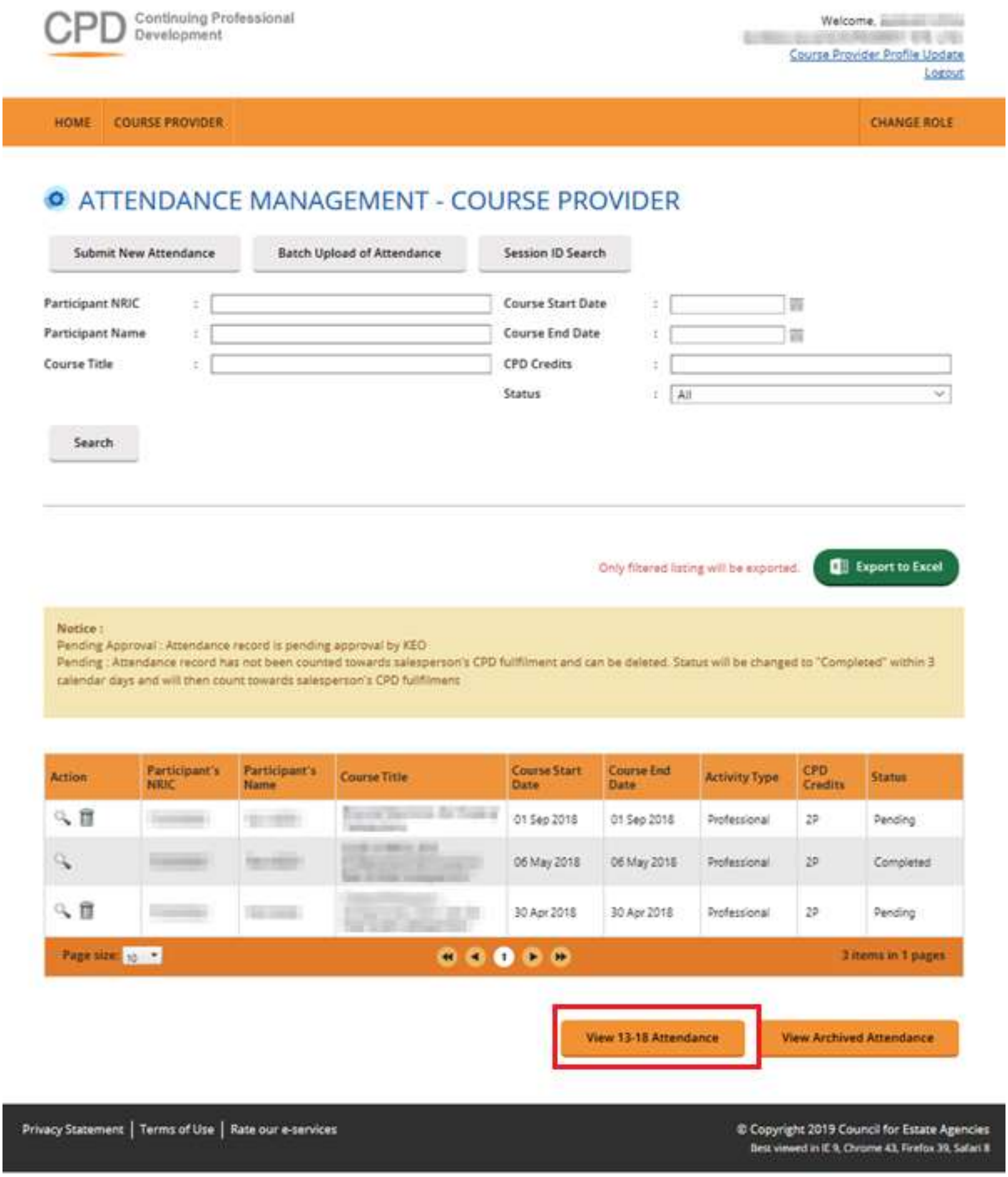


Figure 49 : View 13-18 Attendance

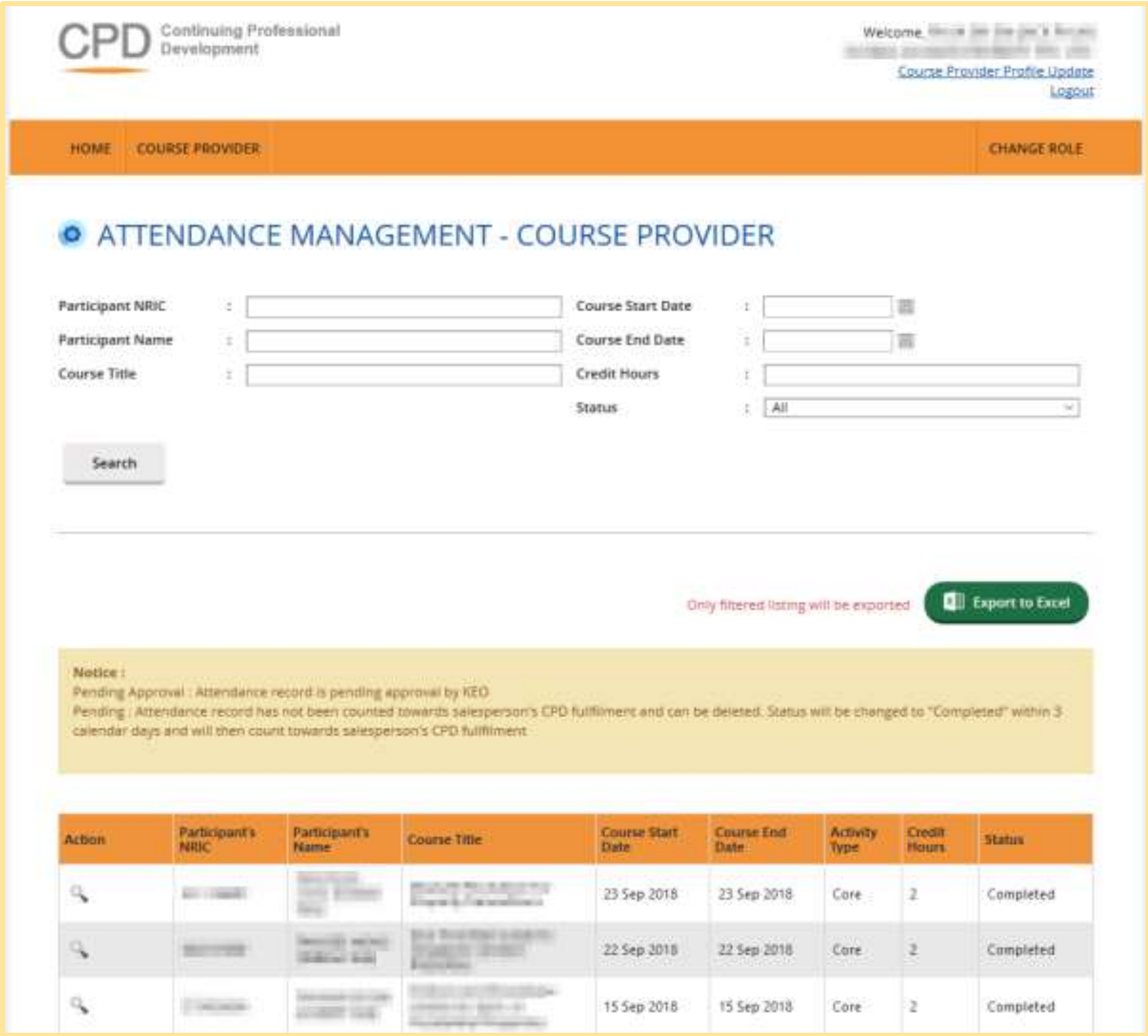


Figure 50 : View 13-18 attendance record page

6.9 View Archived Attendance

View Archived Attendance allows Course Provider to view the attendance record for more than 3 years based on new framework (with effect from Cycle 19-20). By clicking on the button, SP will be redirected to the page in Figure 51.

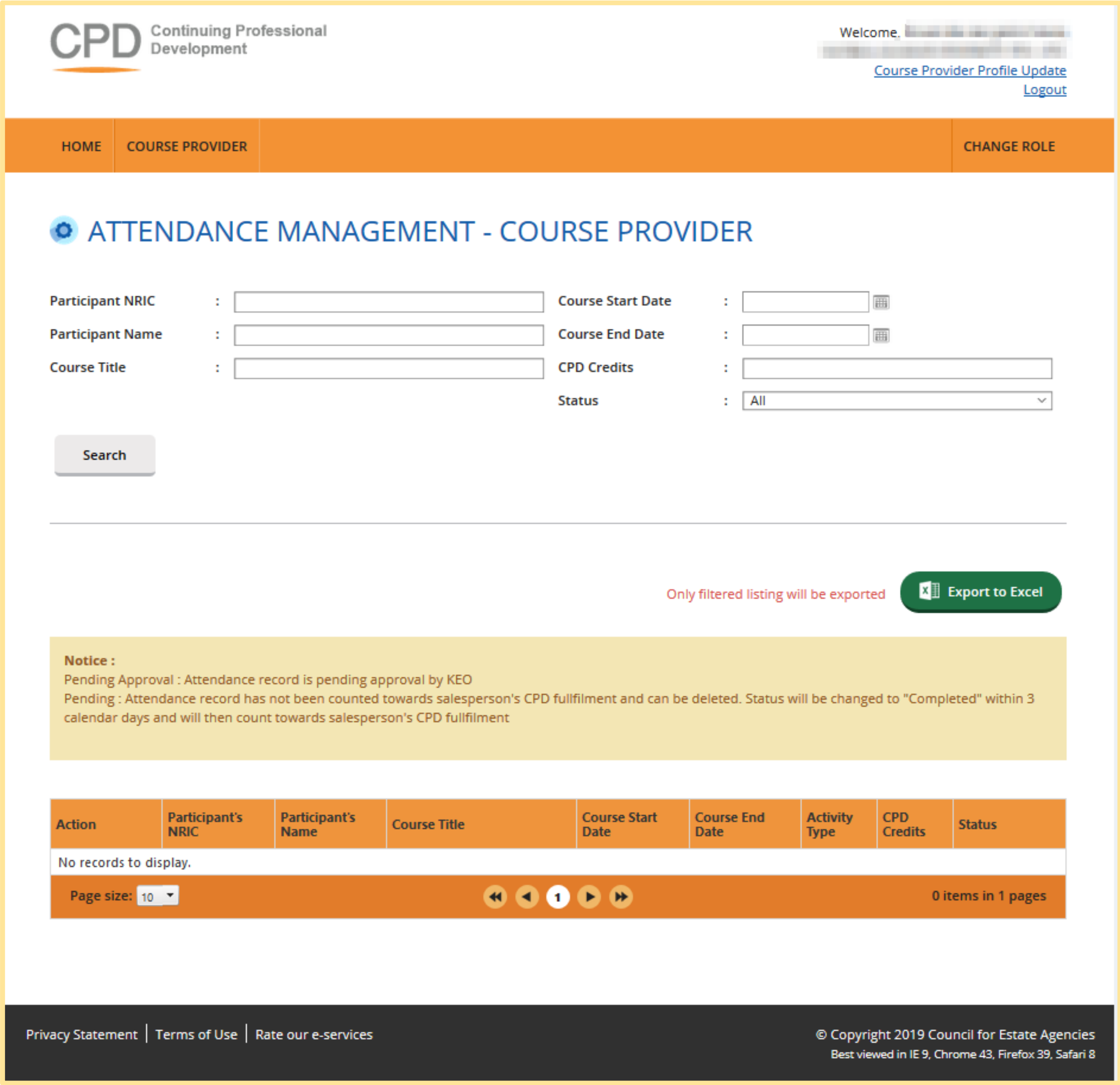


Figure 51 : View archived attendance

7 Post CPD Feedback Management

This chapter shows you how to manage feedback record in the system. To access Feedback Management page, click **Course Providers** >> **Post CPD Feedback Management.**

Figure 52: Course Providers tab drop-down menu: Feedback Management

You will be redirected to Feedback Management page as shown below.

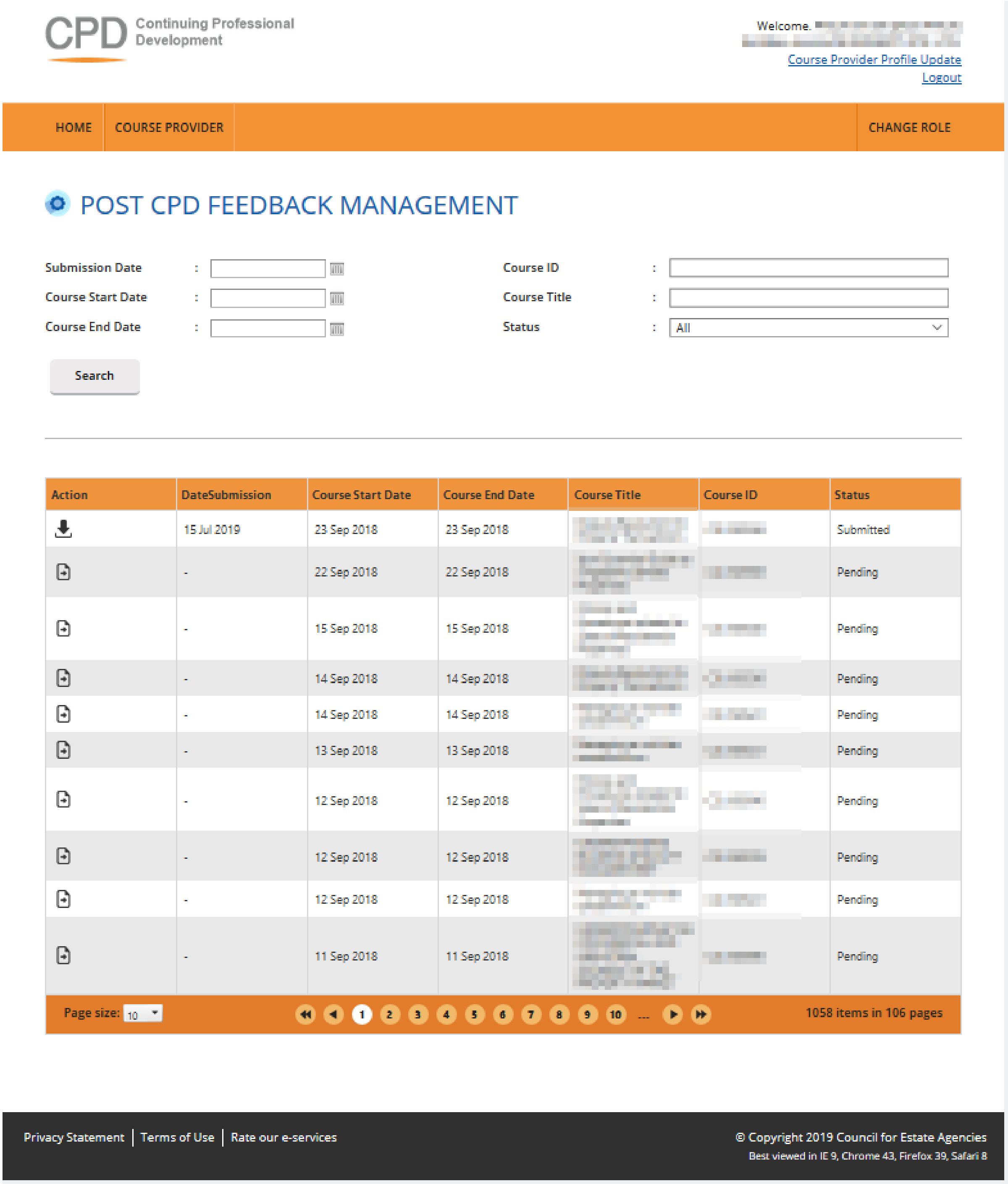


Figure 53: Feedback Management

7.1 Search Feedback

Course Provider is able to search for feedback by using the following filters:

- Submission Date
- Course Date
- Course Title
- Course ID

- Status

Figure 54: Search Feedback

Fill at least one of the search filters. Then click on the Search button to get search result.

7.2 Upload Feedback

Click on icon beside the session record. The following pop-up will appear.

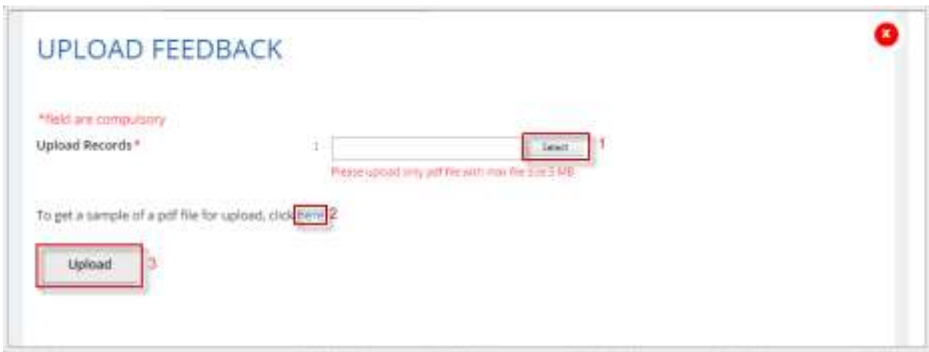


Figure 55: Upload Feedback

1. Select feedback file that you want to upload. You can only upload file in **PDF** format with **maximum file size of 5 MB.**
2. Click this link to download sample feedback report.
3. Click "**Upload**" to submit the file.

7.3 Download Feedback

To download feedback, click beside the session record. The file will be downloaded.

8 Inbox Management

This module is provided for Course Provider to communicate with CPD System Administrator. Expand **Course Providers** tab, then click on **Inbox Management.**

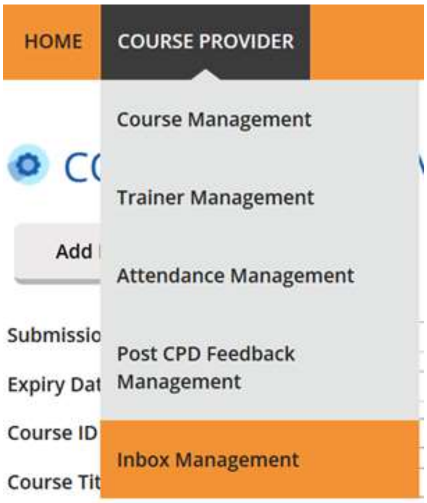


Figure 56: Course Providers tab drop-down menu: Inbox Management

You will be redirected to Inbox Management page as shown below.

Figure 57: Inbox Management

8.1 Compose New Message

To create a new message, click on **New Message** button.

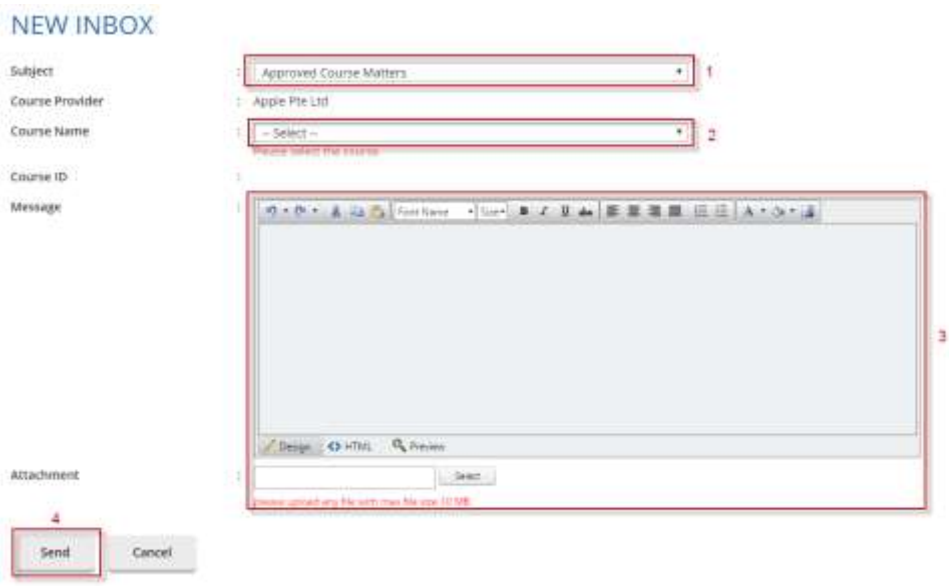


Figure 58: Compose New Message

1. Select **Subject** option. There are 3 (three) options that are provided: Approved Course Matters, CPD Application Matters and General Queries.
2. Select **Course Name** from the drop-down list. The Course ID field will be auto populated based on the selected course.
3. You can write your message content and attach a file if needed (the maximum file size is **10 MB)**.
4. Click **Send** to send the message to CPD System Administrator.

8.2 Search Message

Course Provider can search message record in the Inbox Management module by using the following filters:

- Key words
- Subject
- Course Name
- New/Unread checklist
- From Date
- To Date
- Status

Figure 59: Search message

Fill in at least one search filter. Then click on the Search button to get search result.

8.3 Reply Message

Course Provider can reply to messages sent by CPD System Administrator. To do this, click on icon beside the record. Bold messages mean new or unread messages. Message thread will pop out as shown below.

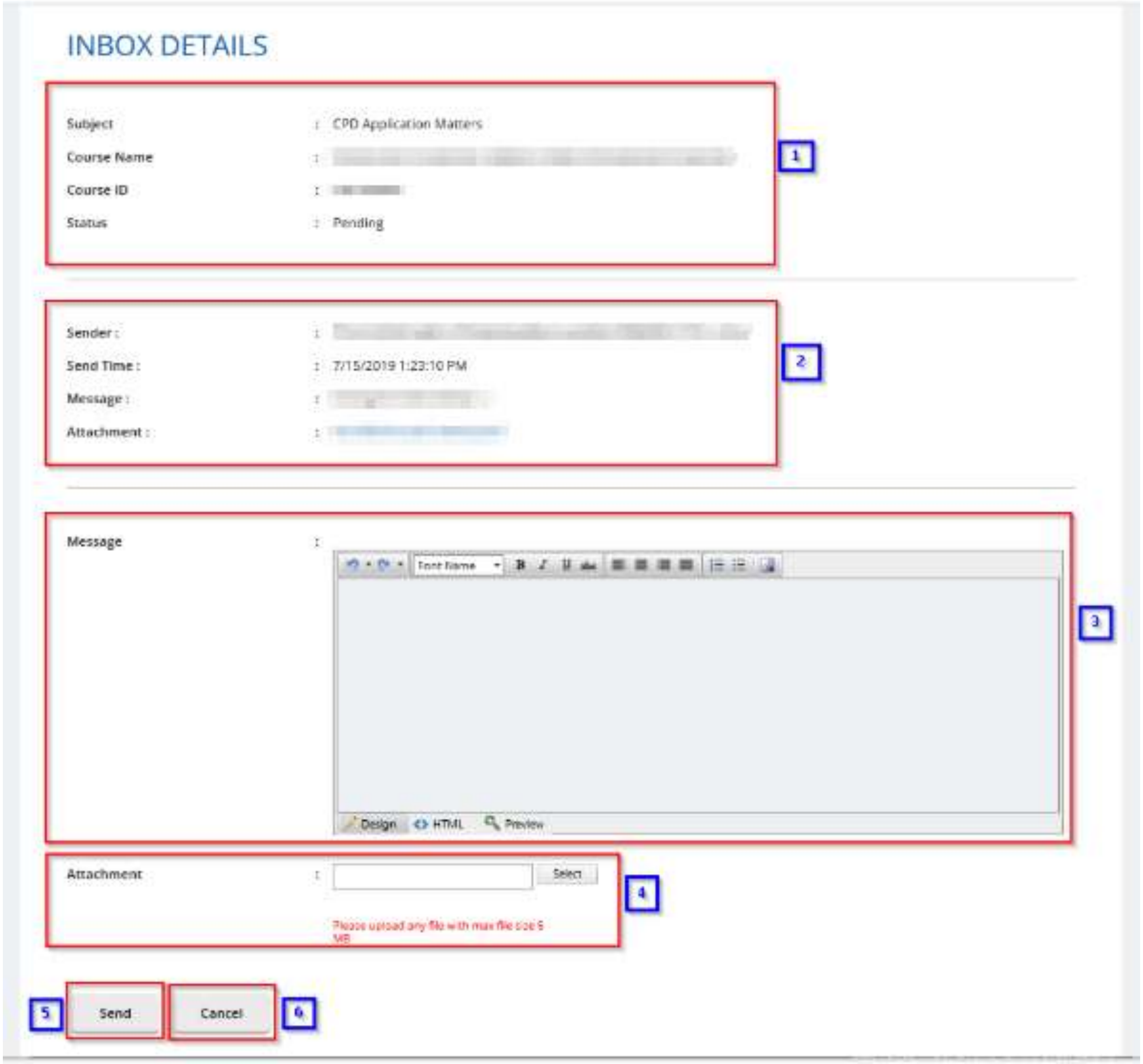


Figure 60: Message thread

1. **Subject details**
   Displays subject details - subject name, course name, course ID and status

2. **Sender details**
   Displays sender details - sender name, sender, sender message and sender attachment

3. **Message field**

   Course Provider is able to reply the messages by writing in the message context box.

4. **Attachment**

   Course Provider is only able to attach 1 (one) file per reply by clicking on the Select button. Maximum size that is allowed to be uploaded is 5 MB.

5. **Send**

   Press the Send button to send the reply.

6. **Cancel**

   You will be redirected to the previous page and the draft message will be discarded.

Once you reply to the message, your reply details will be displayed in the same thread which is shown in Figure 58.

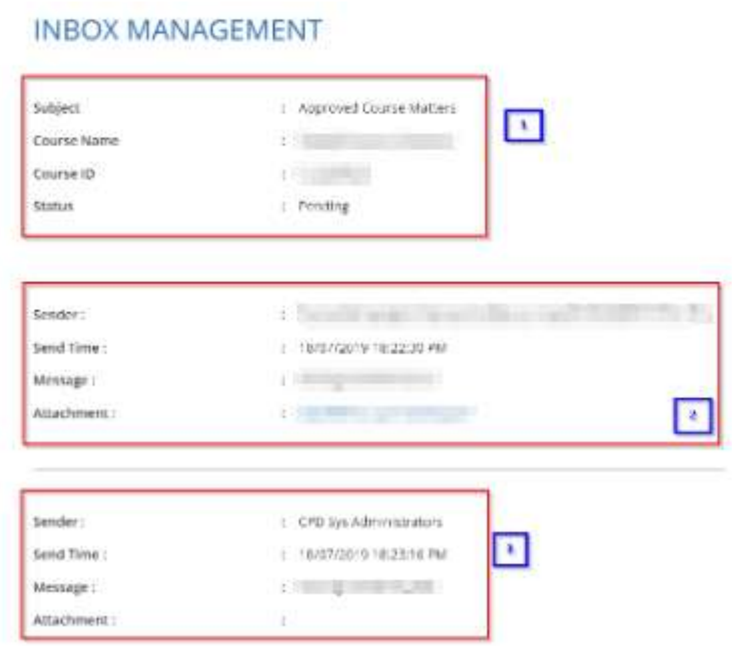


Figure 61: Message thread conversation

Description:

1. Details for the Subject, Course Name, Course ID and Status.
2. Message details submitted by course provider.
3. Content of the reply from CPD System Administration.

8.4 Delete Message

Click on the icon to delete the inbox details. Confirmation pop-up will appear as shown below.

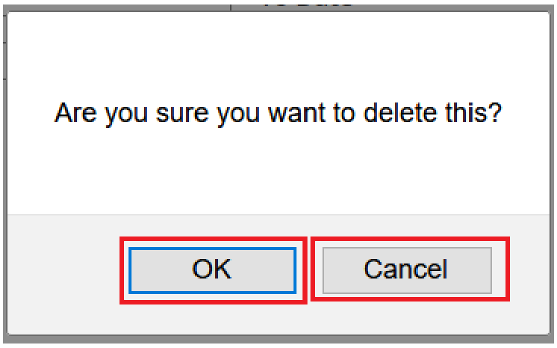


Figure 62: Confirmation pop-up

Click **"OK"** on the confirmation pop-up if you wish to proceed to delete the message or **"Cancel"** if you do not wish to delete the message.

9 Error Notification Handling in Batch Upload

For the type of errors that may be encountered while using batch upload for attendance submission and how to rectify it, please refer to the table below:

#1	Error Notification No file or Invalid file format
Possible Causes	(1) No file selected (2) Select file other than CSV file
How to Rectify	(1) Select a CSV file to use (2) Select only CSV file and download the sample CSV file

#2	Error Notification Incorrect file format is used, please follow the provided format
Possible Causes	Using wrong CSV format that is not suppose to be used by CP. i.e KEO attendance submission form
How to Rectify	Using the CSV format provided in the sample CSV file

#3	Error Notification Row 2: No salesperson found or wrong salesperson, records from row 2 onwards are not submitted
Possible Causes	(1) Incorrect NRIC format used (2) There is no Salesperson with one (or more) of the NRIC listed in the CSV file found in the system / Inputting wrong NRIC of the salesperson

	(3) Salesperson’s name or registration number or name of estate agent or license no of the estate agent not filled in the CSV file (4) Blank row(s) exist(s) between the row filled with to-be-submitted data in the CSV file
How to Rectify	(1) Using correct NRIC format: #0000000@ (# = S, T, F, G and @ = checksum letter) (2) Make sure the NRIC of the salesperson is already correct and registered to the CPD portal (3) Make sure the required data related to the salesperson identity and organization completed in the CSV file (4) Delete the blank row in the CSV file

#4	Error Notification Row 2: CEA does not allow repeated submission for the same course within the same CPD cycle, records from row 2 onwards are not subm
Possibl e Causes	(1) Submitting record that is already existed in the system (2) There are duplicated records inside the CSV file
How to Rectify	(1) Delete the record from the CSV file as the system will inform which line/row in the CSV file that the system cannot processed. If the submitted record is incorrect, please contact CEA for assistance (2) Make sure there is no duplicates of records in the CSV file

#5	Error Notification Row 2: Session has not ended, records from row 2 onwards are not submitted
Possible Causes	Session ID that is not yet started inserted in the session ID column and try to be uploaded
How to Rectify	Use the session ID that already ended

#6	Error Notification Row 2: No session found, records from row 2 onwards are not submitted
Possible Causes	Course ID wrong or blank, Session ID wrong or blank
How to Rectify	Fill with the correct course ID and/or session ID

#7	

Possibl e Causes	(1) Using CSV file without column header (first row) that is provided in the CSV sample file (2) Submit CSV file but not with CP format
How to Rectify	(1) Use the sample CSV file as there the column header is already provided (2) Using the correct format for CP