Council for Estate Agencies (CEA)

My CPD Portal (version 2.0)

User Guide – Estate Agents

W.e.f. 1 Oct 2019

Change Document History

Document Changes	Date	Author	Description
1.0	3 Mar 2017	Xtremax	Initial Release
2.0	18 Aug 2017	Xtremax	Removed Submission of Attendance for Core CPD Activities by KEO/Authorised User
3.0	07 August 2018	Xtremax	Addition of Approve/Reject Attendance in Attendance Management and CPD Overall Fulfilment section in CPD Requirement Monitoring
4.0	07 July 2019	Xtremax	CPD revamp
4.1	02 September 2019	Xtremax	- Renaming the View 13-18 Attendance and View 13-18 CPD Requirement to View Past Attendance and View Past CPD Requirement for CPD revamp - Updating of screenshots

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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 Key Executive Officers/Authorised User

The Key Executive Officers (KEOs) and their authorised users can use this system to:

- Submit the KEO's Generic Competencies Courses CPD attendance records;
- Submit the salespersons' Generic Competencies Courses CPD attendance records;
- Approve the Generic Competencies Courses CPD attendance records submitted by the salespersons; and
- Monitor the CPD fulfilment of the salespersons under the Estate Agent.

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:

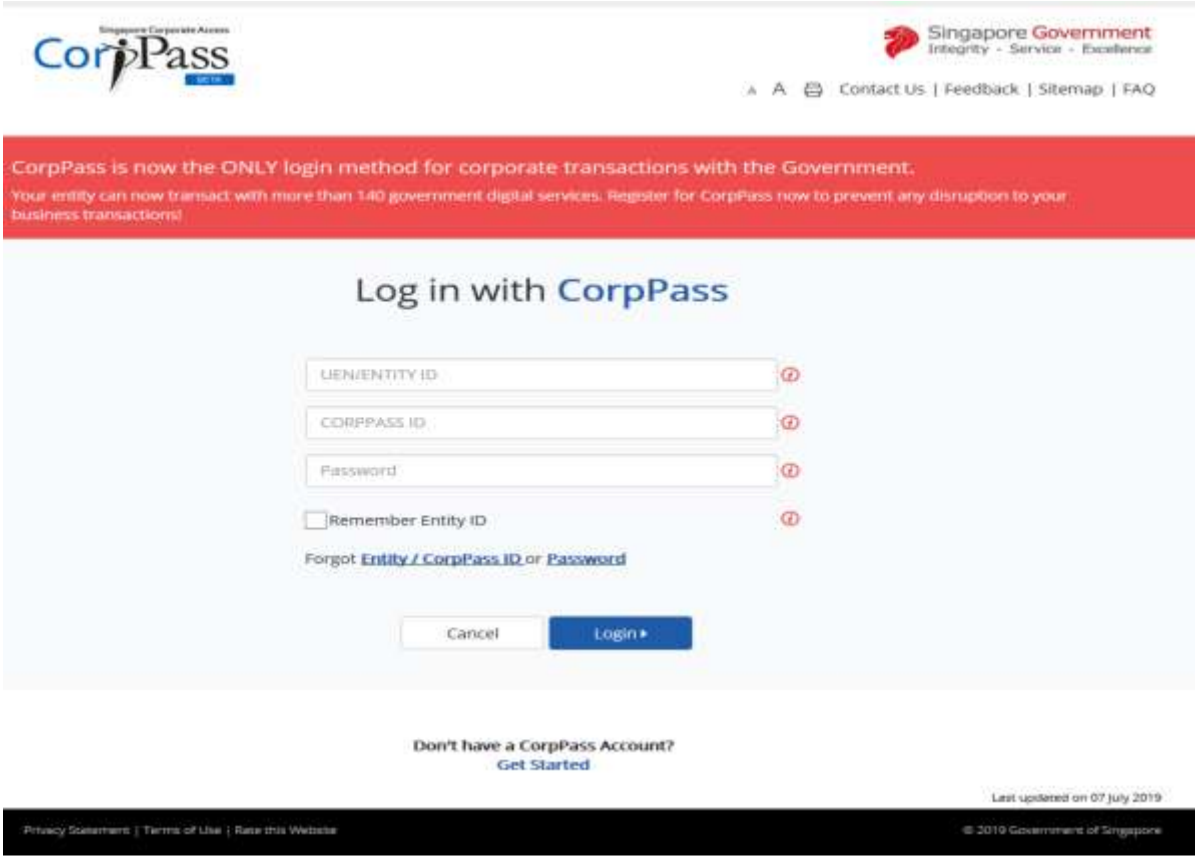


Figure 3: CorpPass Login Page

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

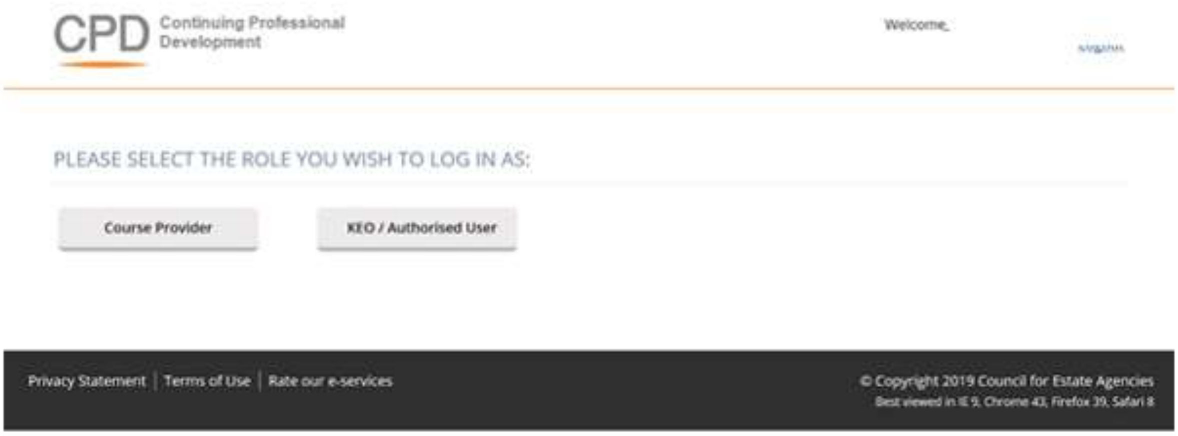


Figure 4: Multi Role dashboard

On the dashboard, the KEO or Authorised User will be able to view the overall CPD fulfilment status of all the salespersons in their Estate Agent.

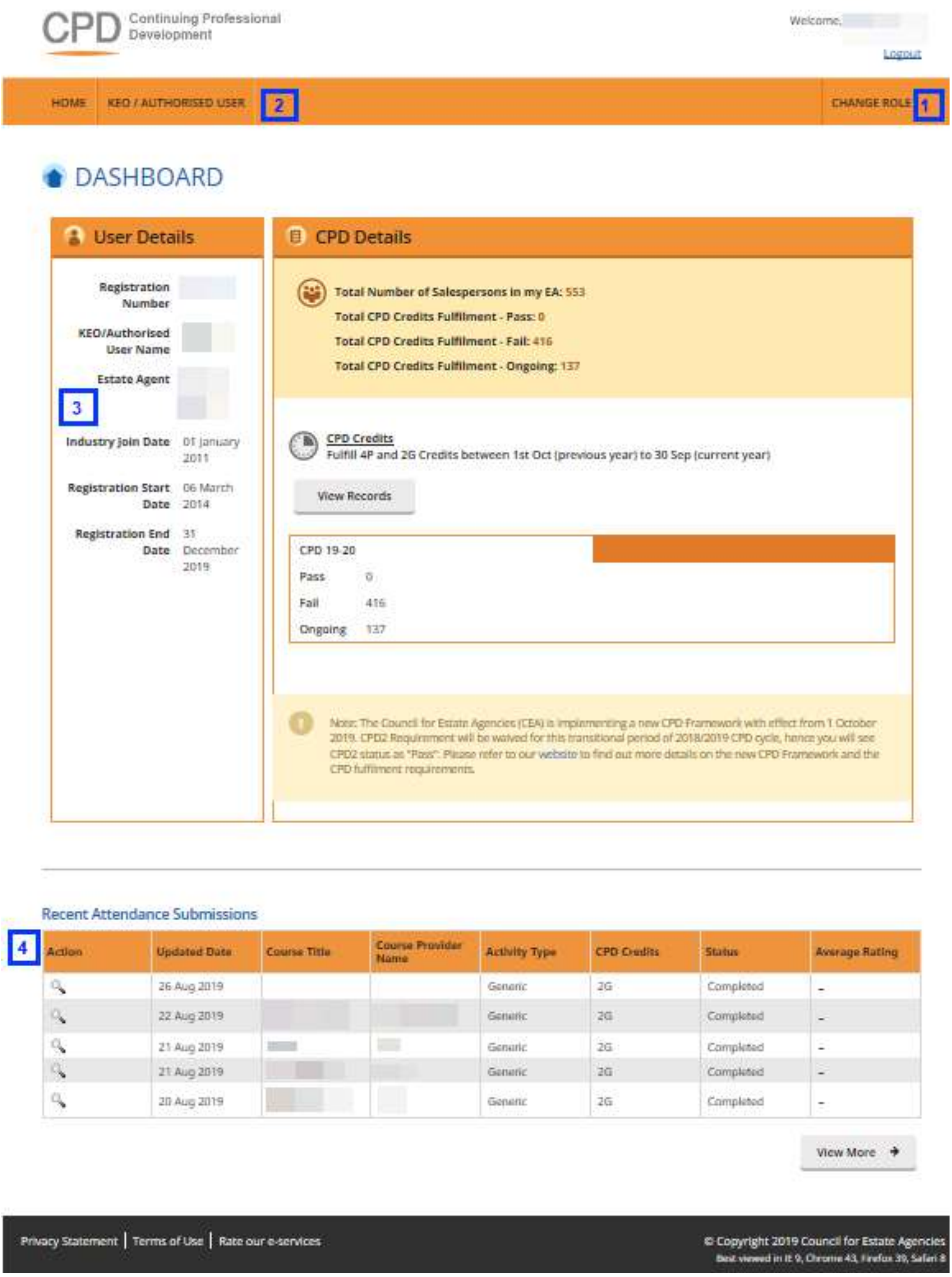


Figure 5: KEO/ Authorised User Dashboard

Description:

1. **Change Role**
   If you want to switch the dashboards e.g. from KEO dashboard to Course Provider dashboard, click this tab and you will be directed back to the multi roles dashboard.

2. **KEO/ Authorised User**
   Click on this tab to view Attendance Management or CPD Requirement Monitoring

3. **User Details and CPD Details**
   The User Details panel displays the registration details of the KEO.
   The CPD Details panel shows:
   - The total number of salespersons under this Estate Agent
   - The total number of salespersons that fulfilled and did not fulfil the Credit Fulfilment. Click **View Records** to view the detailed records of the SPs under this Estate Agent.

4. **Recent Attendance Submission**
   This panel shows the recent attendance submissions made**.** Click **View More** to go the **Attendance Management** page. You will be directed to the page shown in **Figure 7**.

3 Attendance Management

This function is for the KEO/ Authorised User to:

- Submit attendance for Generic Competencies courses for the KEO;
- Submit attendance for Generic Competencies courses for their salespersons; and
- Approve the Generic Competencies attendance records submitted by their salespersons.

To access the Attendance Management page, click **KEO/Authorised User >> Attendance Management**.

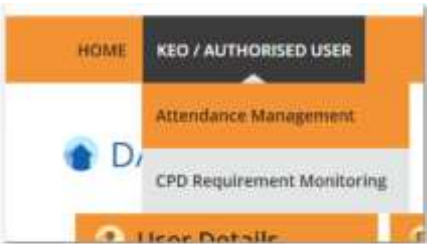


Figure 6: KEO/Authorised User tab dropdown menu: Attendance Management

You will be directed to the page shown in **Figure 7.**

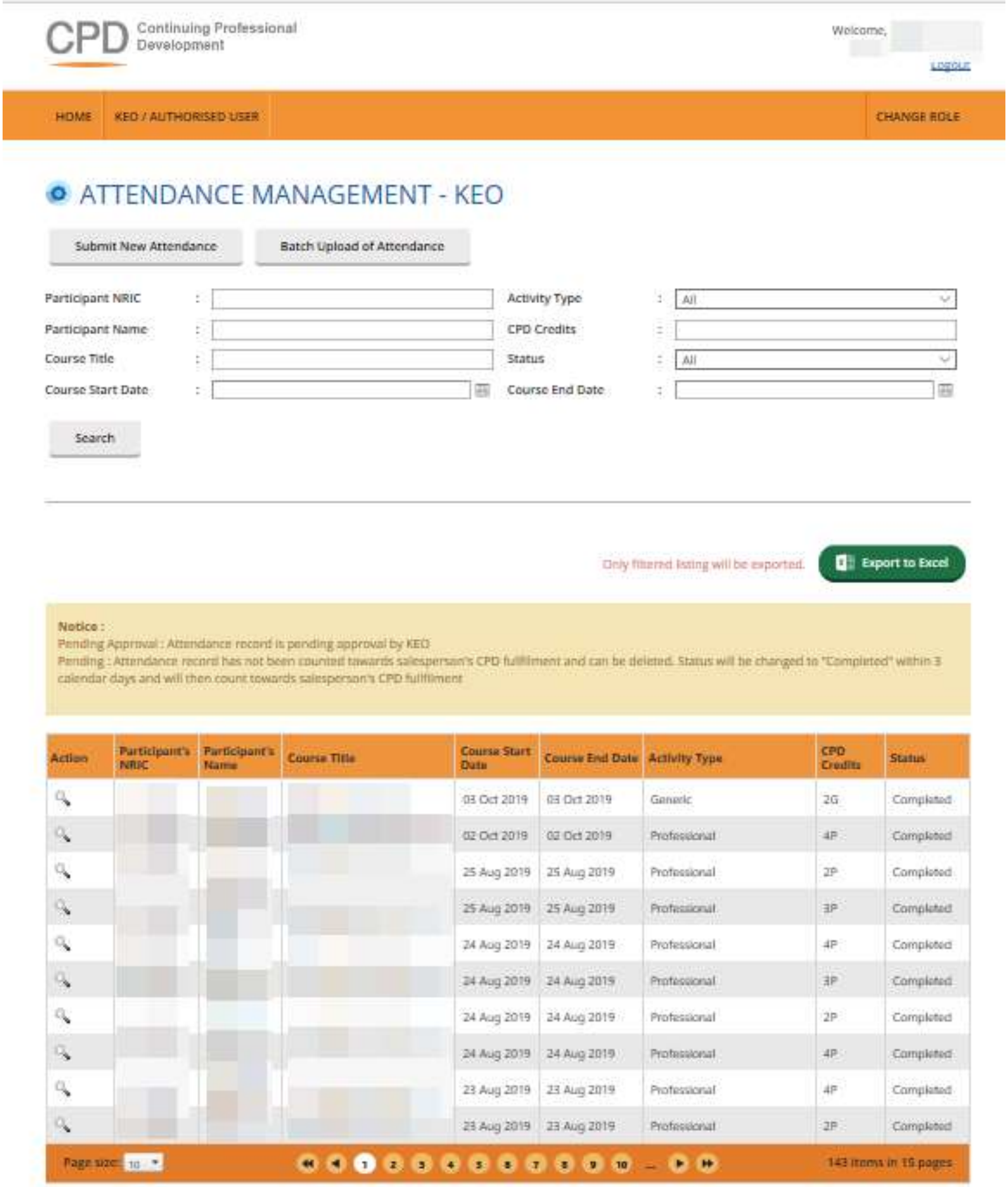


Figure 7: Attendance Management – KEO/Authorised User

3.1 Submit New Attendance

To submit Generic Competencies Attendance record for KEO or Salesperson, click the **Submit New Attendance** button and you will see the pop-up shown in **Figure 8**.

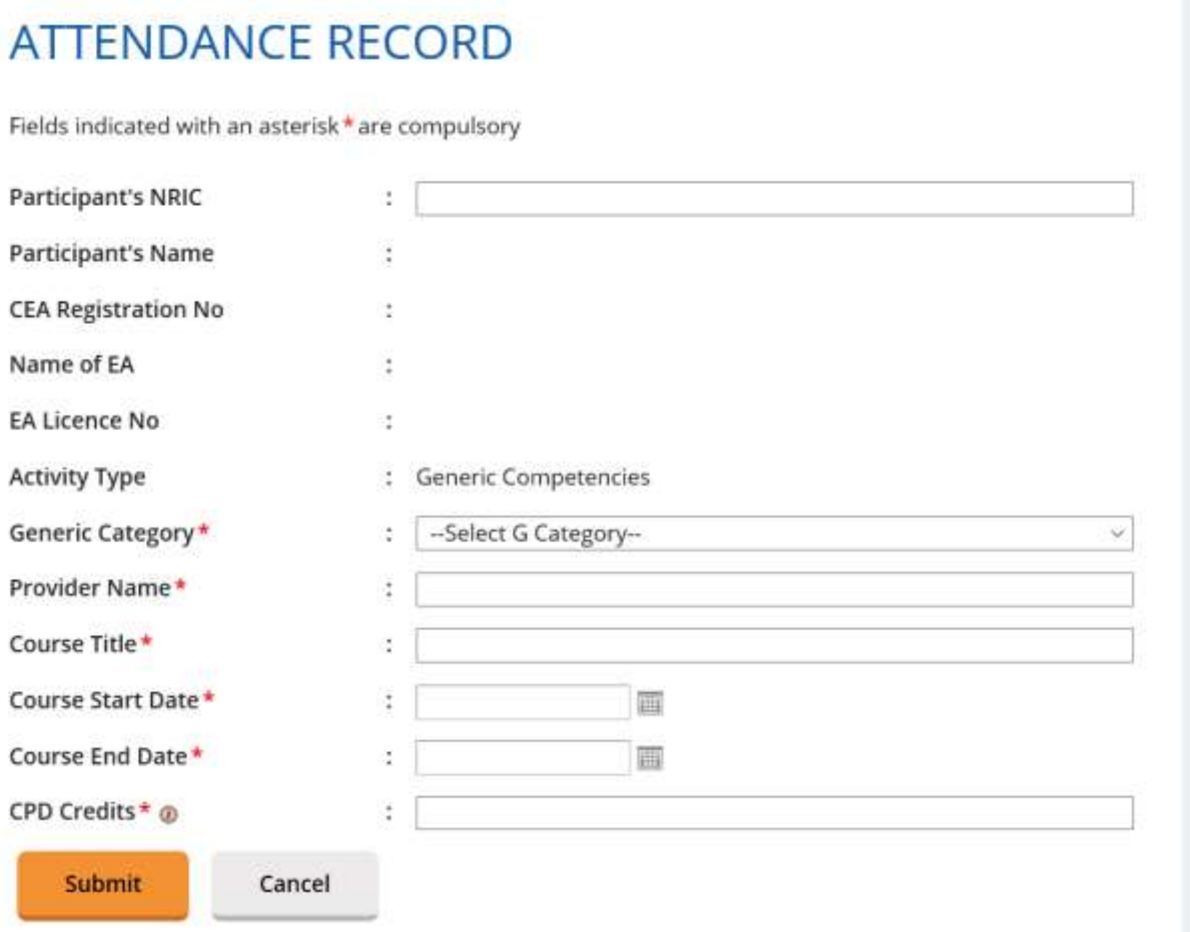


Figure 8: Submit New Attendance – KEO/ Authorised User

To update the attendance record:

1. Key in the salesperson's **NRIC**. The Salesperson Name, CEA Registration Number, Name of EA and EA Licence No will be auto populated.
2. Select the **Generic Category** from the drop-down list.
3. Key in the **course provider's name** in the text box provided.
4. Key in the **course title** in the text box provided.
5. Fill in the **course start date**, **course end date** and **credit hours**.
6. 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 will be displayed in the table as shown in **Figure 9** with the status "Pending". KEO/ EA are able to delete the record within 3 calendar days for records that are in "Pending Approval" or "Pending" status. After 3 calendar days, "Pending" records will be changed to "Completed" and credit hours will be recognised towards the salesperson's CPD requirement fulfilment.

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

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 Authorised 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

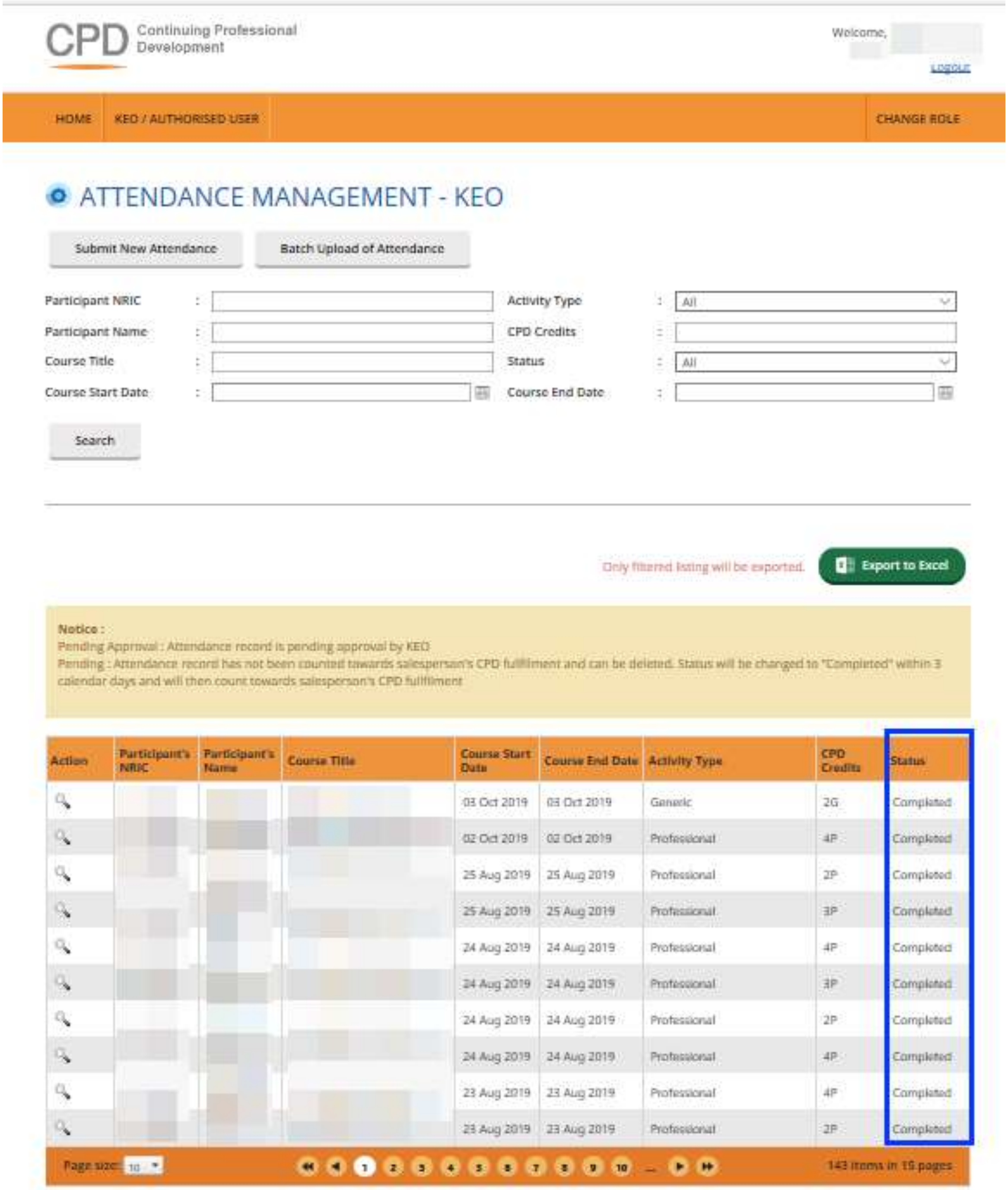


Figure 9: Attendance Record List

3.2 Batch Upload Attendance

To update multiple attendance records for Generic Competencies Courses, click **Batch Upload of Attendance** button. The following screen will appear.

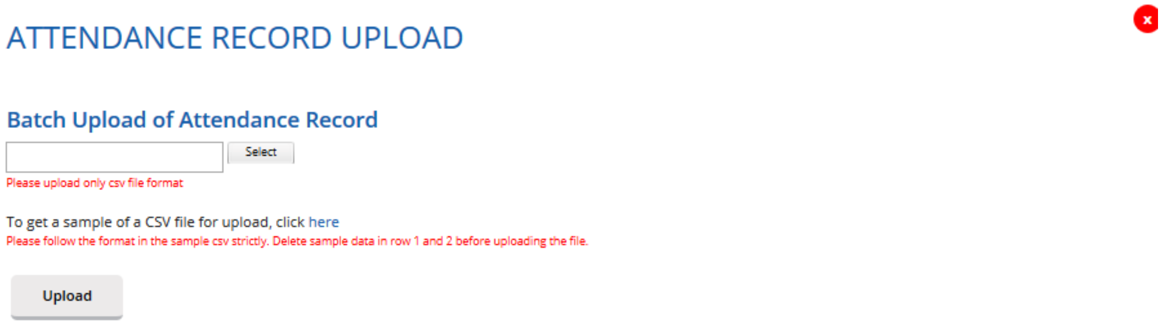


Figure 10: Batch Upload of Attendance

Steps for 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 a sample of a 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, a notification will appear and the pop up will automatically closed. (Refer to **Figure 11**). But if some records failed to be uploaded, an error notification will appear. (Refer to **Figure 12**). **Please take note that if the first record in the csv file fails to be submitted, the rest of the records will not be submitted. Please repeat the above steps 1 to 3 to update the attendance records after correcting the errors.**

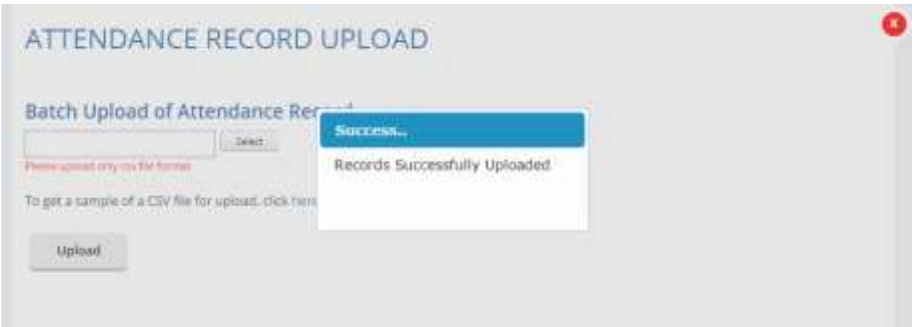


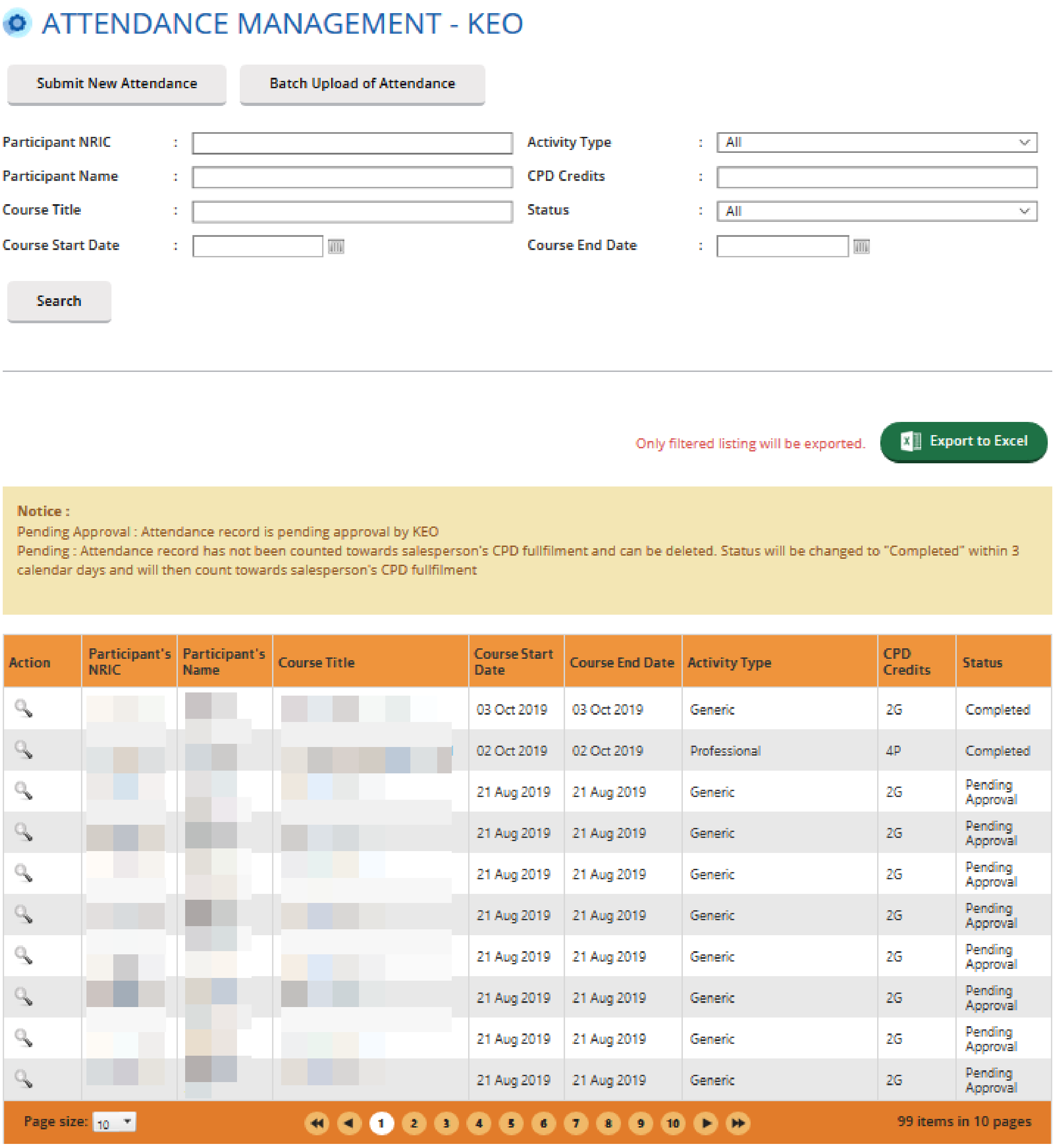
Figure 11: Batch Upload of Attendance – Success Notification

Figure 12: Batch Upload of Attendance – Error Notification Example: Duplicate Record Found

For further details on the error notifications and how to rectify it, please refer to **Session 3 Error Notification Handling in Batch Upload**.

3.3 View Attendance Record

After the attendance is submitted, the record will appear in the table as shown in **Figure 13**. To view the record, click on the 🔍 icon beside the record. The attendance record pop up will appear as shown in **Figure 14**.



Action	Participant's NRIC	Participant's Name	Course Title	Course Start Date	Course End Date	Activity Type	CPD Credits	Status
				03 Oct 2019	03 Oct 2019	Generic	2G	Completed
				02 Oct 2019	02 Oct 2019	Professional	4P	Completed
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval
				21 Aug 2019	21 Aug 2019	Generic	2G	Pending Approval

Figure 13: Attendance Record List

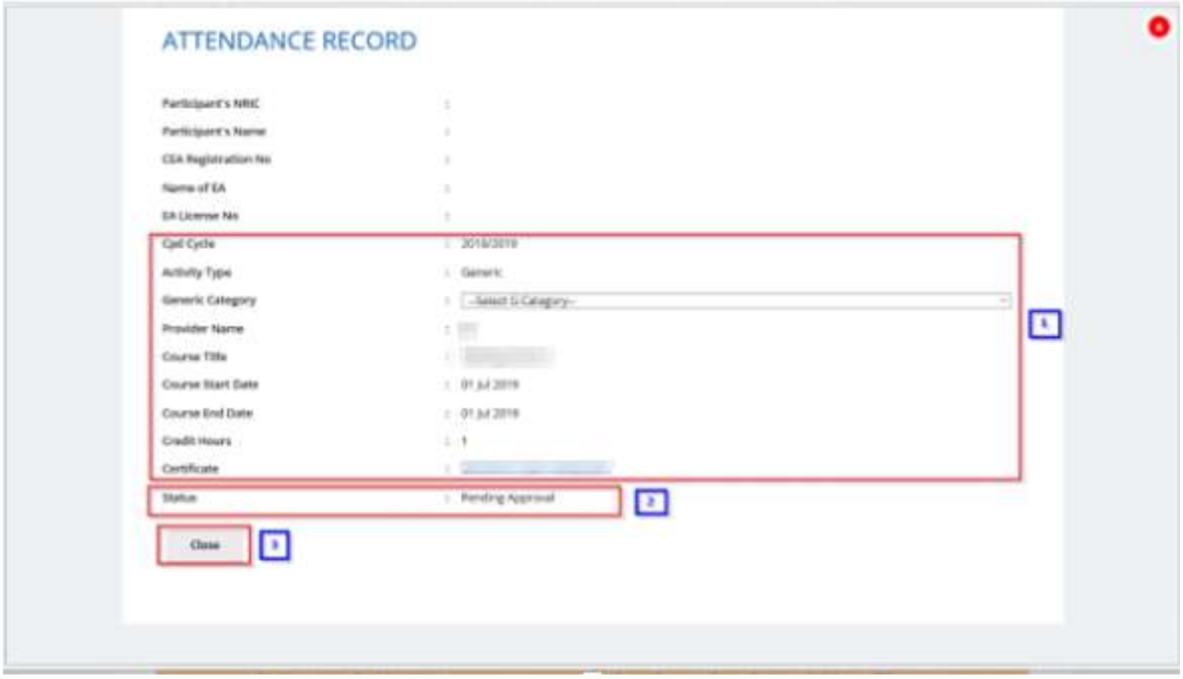


Figure 14: View Attendance Record

Description:
1. Attendance record details
Contains details of the attendance record that were submitted.

2. Status
You can only reject the records with "Pending Approval" status.

3. Close
You will be directed back to the **Attendance Management** page after you click **Close**.

3.4 Approve/Reject Attendance Record

You can approve/reject a submitted attendance by viewing the records that are in "Pending Approval" status only when Generic Category has been selected. To do so, click on the icon beside the record that has a "Pending Approval Status". The attendance record pop up will appear as shown in **Figure 15**. "

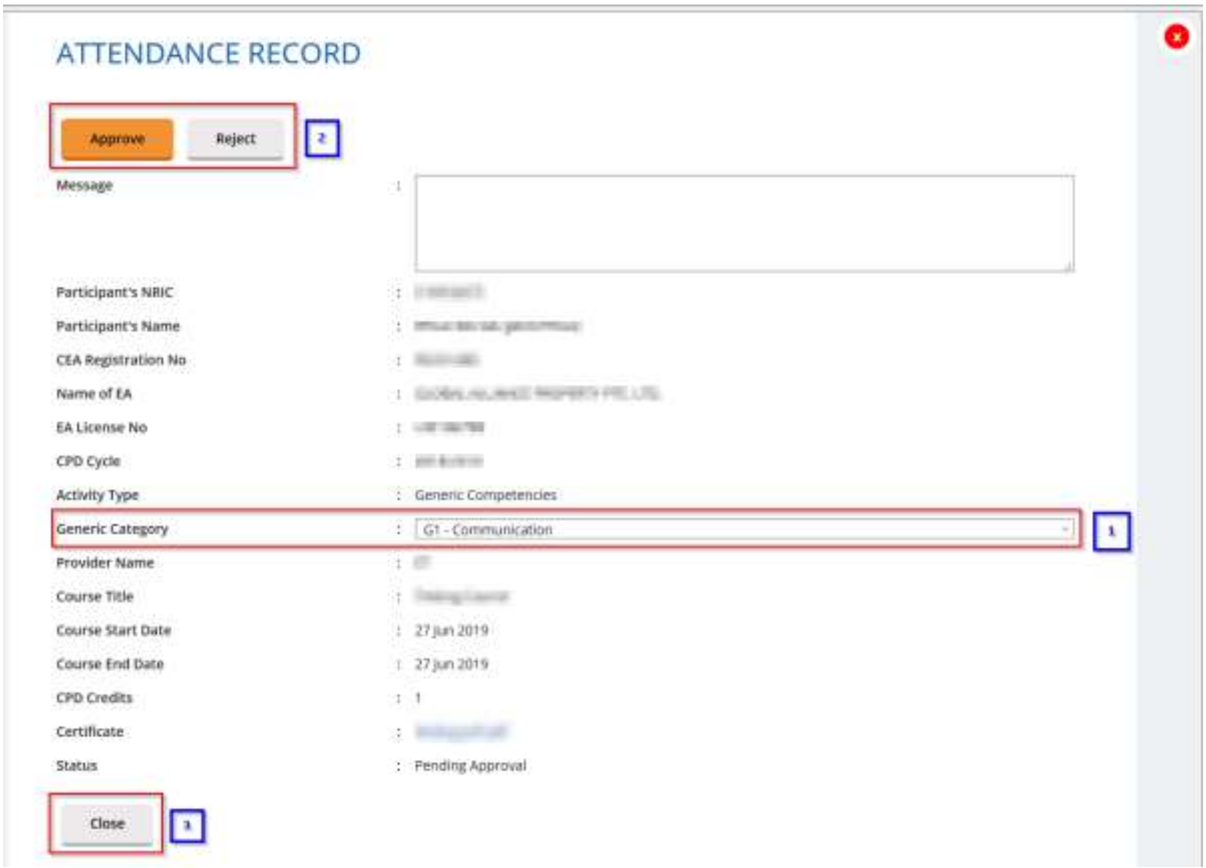


Figure 15: View Attendance Record in Pending Approval Status

1. Select generic category so that approve or reject button will appear.
2. To **approve/reject** the attendance, click on either button in number 2 in **Figure 15**.
3. Clicking on **Close** will lead you back to the Attendance Management page.

4. Once approved, the status will change to "Pending". After 3 calendar days, "Pending" records will be changed to "Completed" and credit hours will be recognised towards the salesperson's CPD requirement fulfilment.

5. Rejected attendance will have the "Rejected- KEO" status.

3.5 Search Attendance Record

You can look for a salesperson's attendance record by using the following filters under the Attendance Management page (refer to **Figure 16**).

- Participant NRIC
- Participant Name
- Course Title
- Course Start Date
- Activity Type
- Credit Hours
- Status
- Course End Date

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

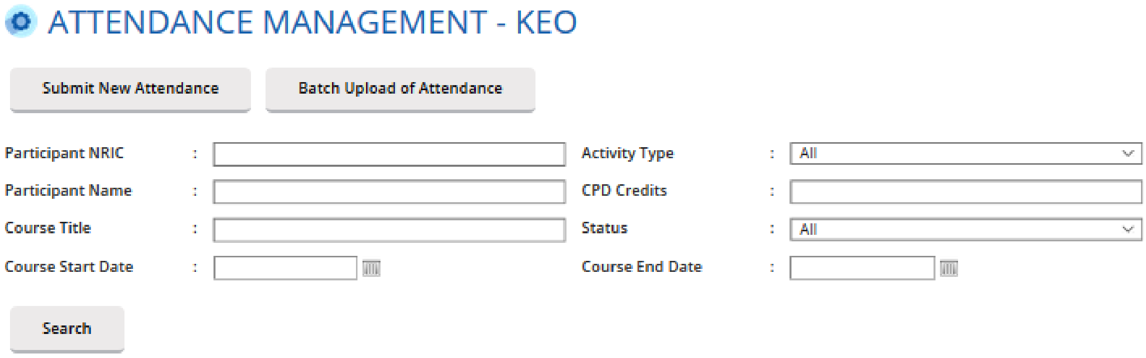


Figure 16: Search Attendance Record

3.6 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.

3.7 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. The attendance file will be downloaded.

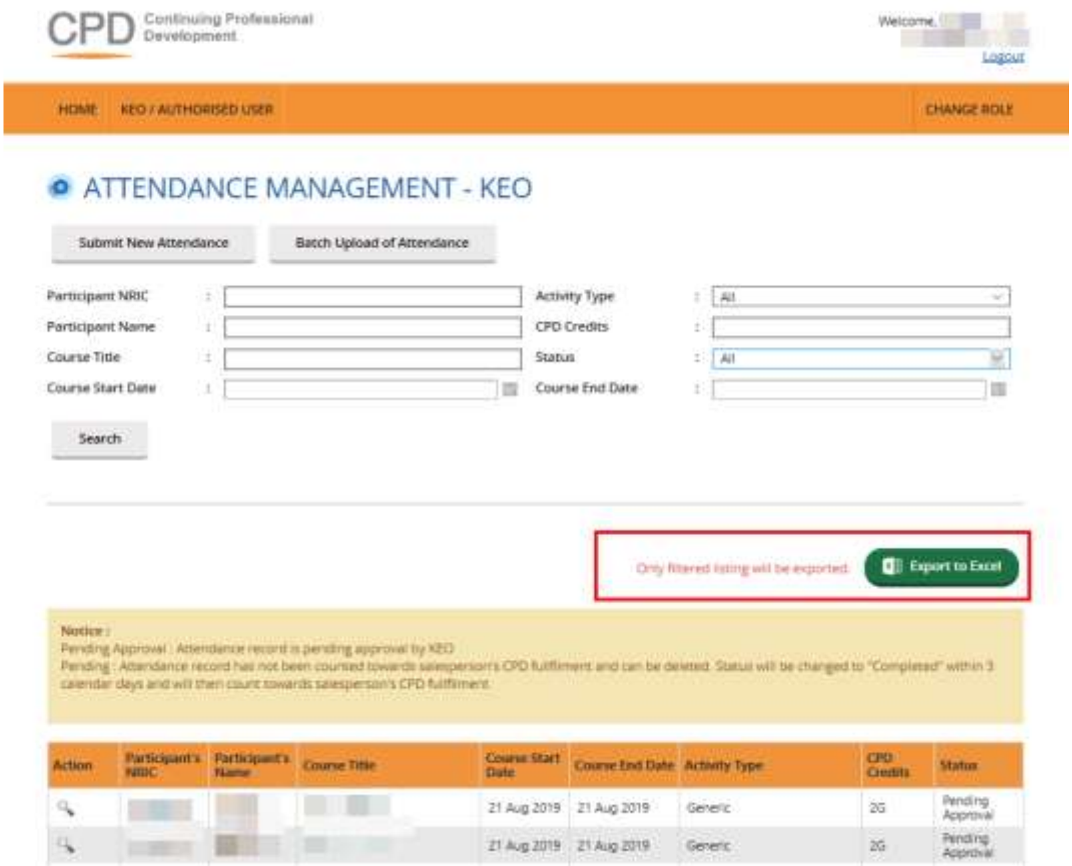


Figure 17: Export Attendance Record

To export a **selected record(s)**, you may proceed to search the record(s) by **using the filter** in **Figure 16** and then clicking on the **Export button** shown in **Figure 17**.

3.8 View Past Attendance

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

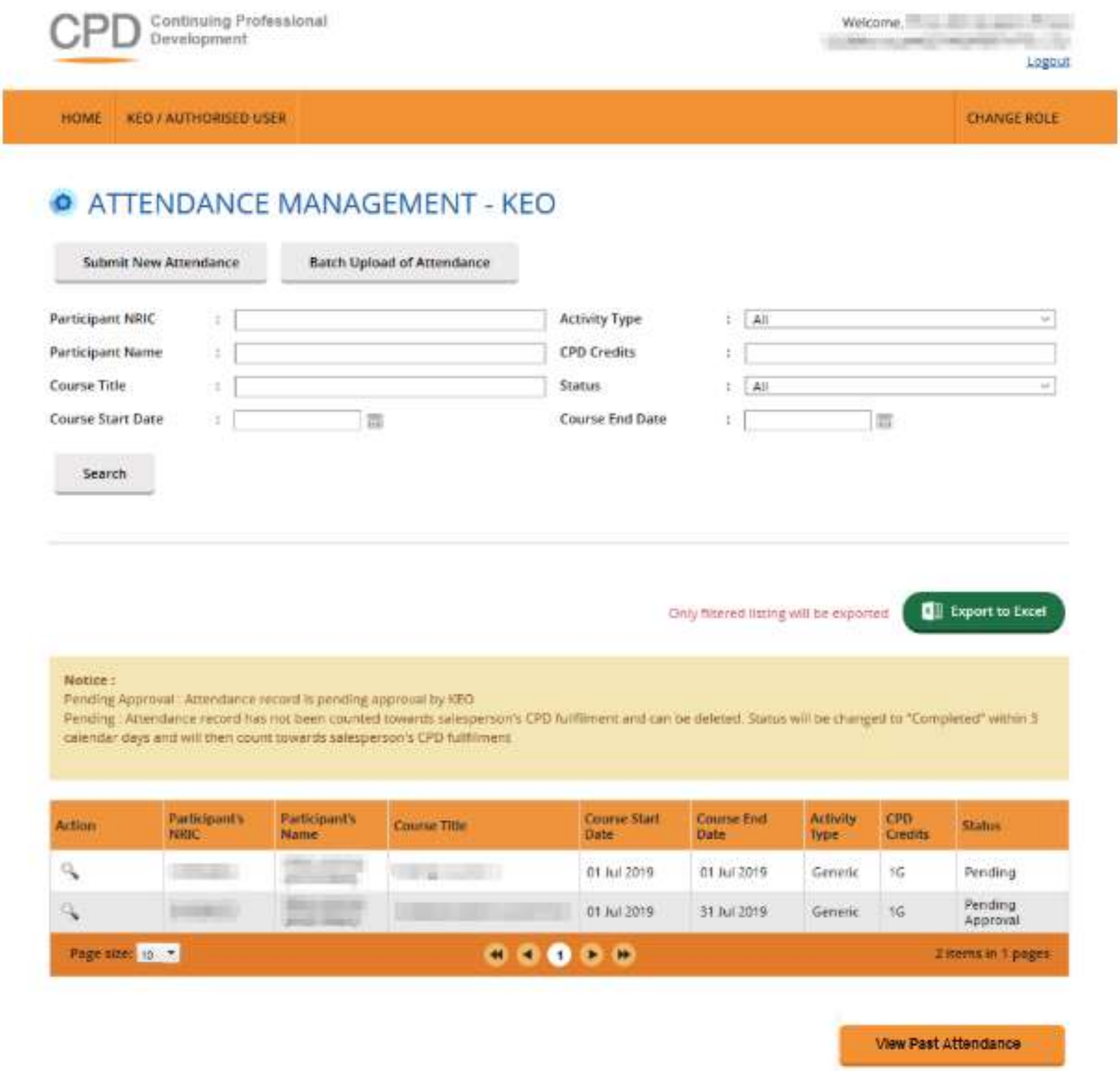


Figure 18: Attendance Management

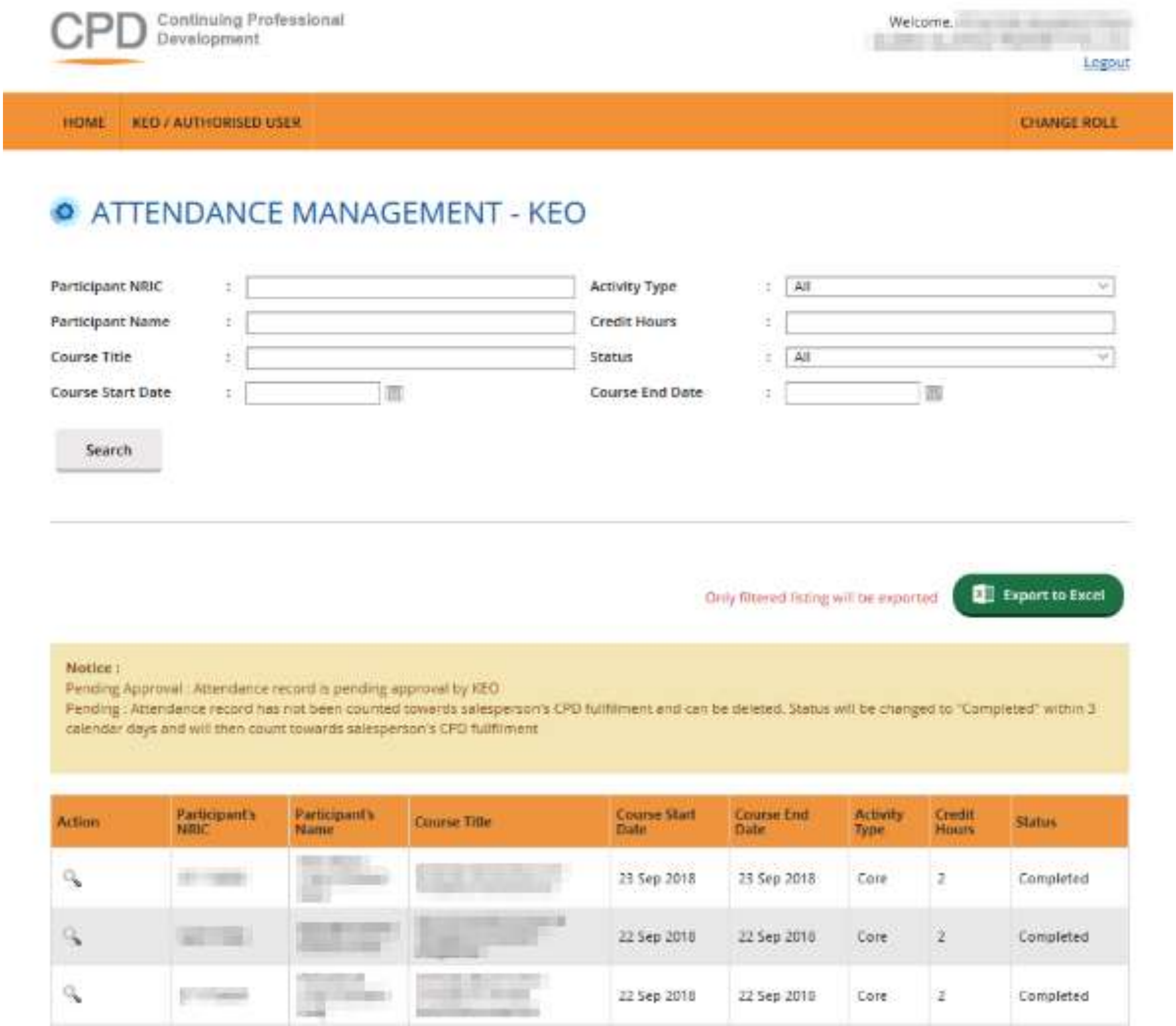


Figure 19: View Past Attendance record page

4 CPD Requirement Monitoring

This function is for the KEO/ Authorised User to **<u>track the Salesperson/KEO CPD requirement calculation information for the different calculation duration.</u>** Click on the **KEO/ Authorised User >> CPD Requirement Monitoring**.

Figure 20: KEO/ Authorised User – CPD Requirement Monitoring

4.1 CPD Requirement

CPD Requirement is the number of CPD credits (i.e Professional, Generic) each salesperson/KEO will be required to achieve in 1 CPD Year Cycle. CPD calculation duration will be based on 1 CPD Year Cycle and the calculation logic will be based on the number of Professional Competencies, Generic competencies CPD credit a salesperson/KEO needs to accumulate for the duration.

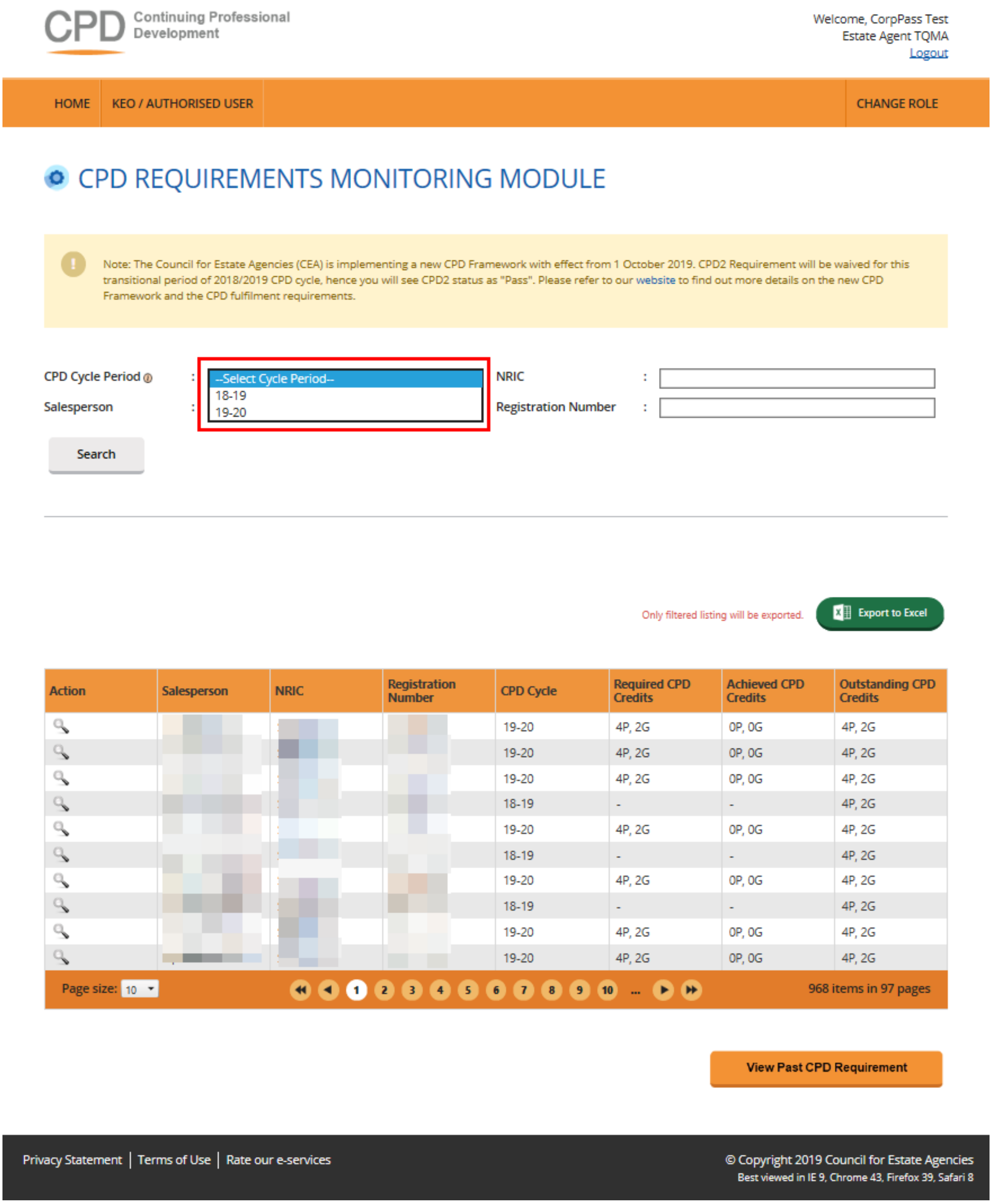


Figure 21: Requirement Monitoring Module

Definitions

1. **Action (** 🔍**)**
   To view the details of the attendance records for a CPD Cycle.

2. **Personal Details**
   The respective salesperson's 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.

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. **CPD Status**
   The current status of **CPD** fulfilment for a particular **CPD** Cycle:
   Pass: The **achieved credit** met the **required credit** for the particular **CPD** Year Cycle.
   Fail: The **achieved credit** did not meet the **required credit** by the end of the particular **CPD** Year Cycle.
   Ongoing: The **achieved credit** has not met the **required credit** while the **CPD** Cycle has not ended.
   Exempted: The salesperson is exempted from the CPD requirements for the particular **CPD** Cycle.

7. **Outstanding CPD Credits**
   Total credits remaining for professional and generic competencies: Shows the **total credits remaining professional and generic competencies** that the salesperson needs to complete for a particular **CPD** Cycle.

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

4.2 View Past CPD Requirement

Clicking on the "View Past CPD Requirement" allows KEO to view the past CPD requirement from the past CPD framework.

KEO is able to filter the records based on the CPD Requirement Type, CPD Cycle Period, CPD Status, Salesperson, NRIC and Registration Number.

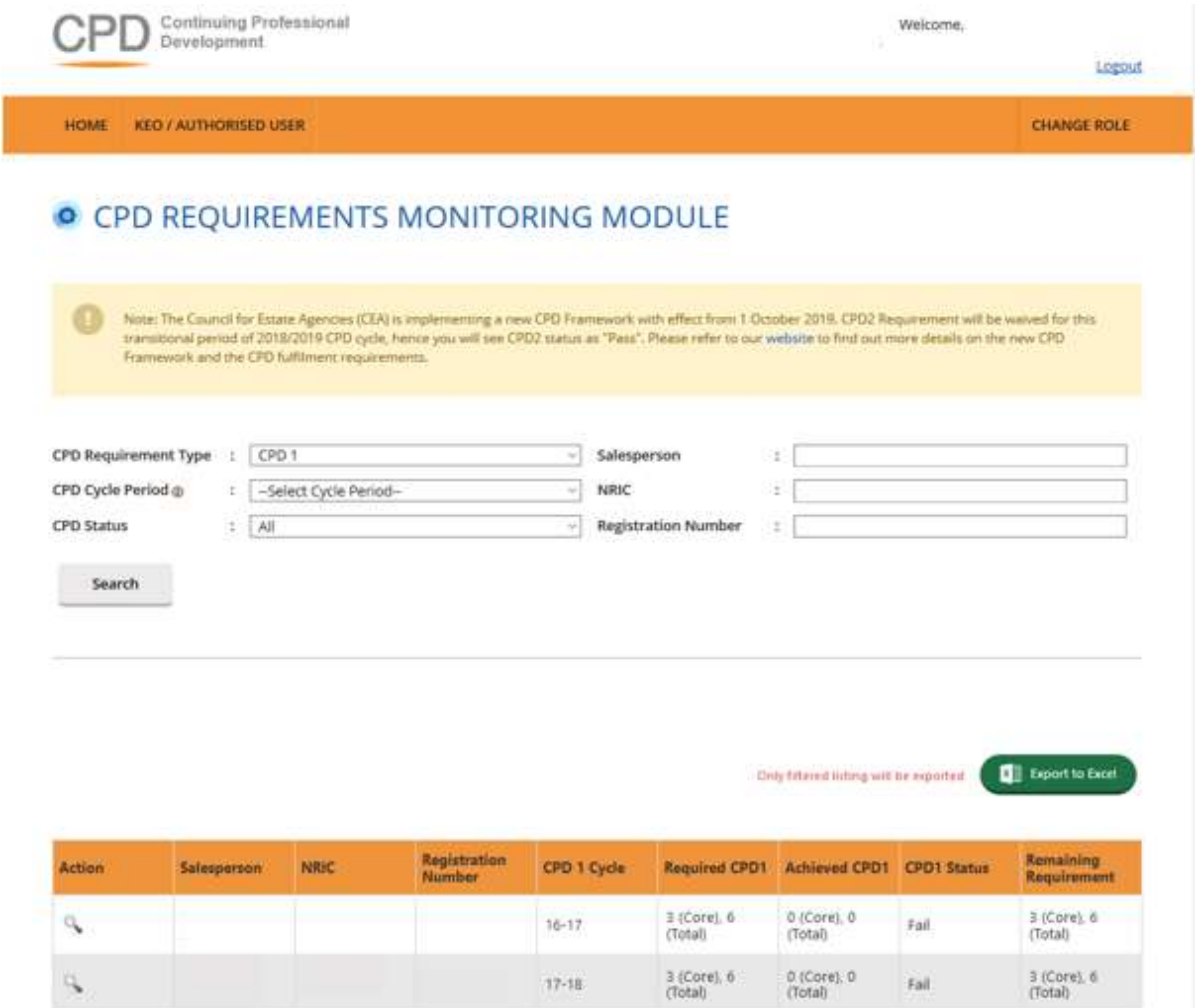


Figure 22: Requirement Monitoring Module – View Past CPD Requirement

(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) each salesperson is required to achieve in **one CPD Cycle**.

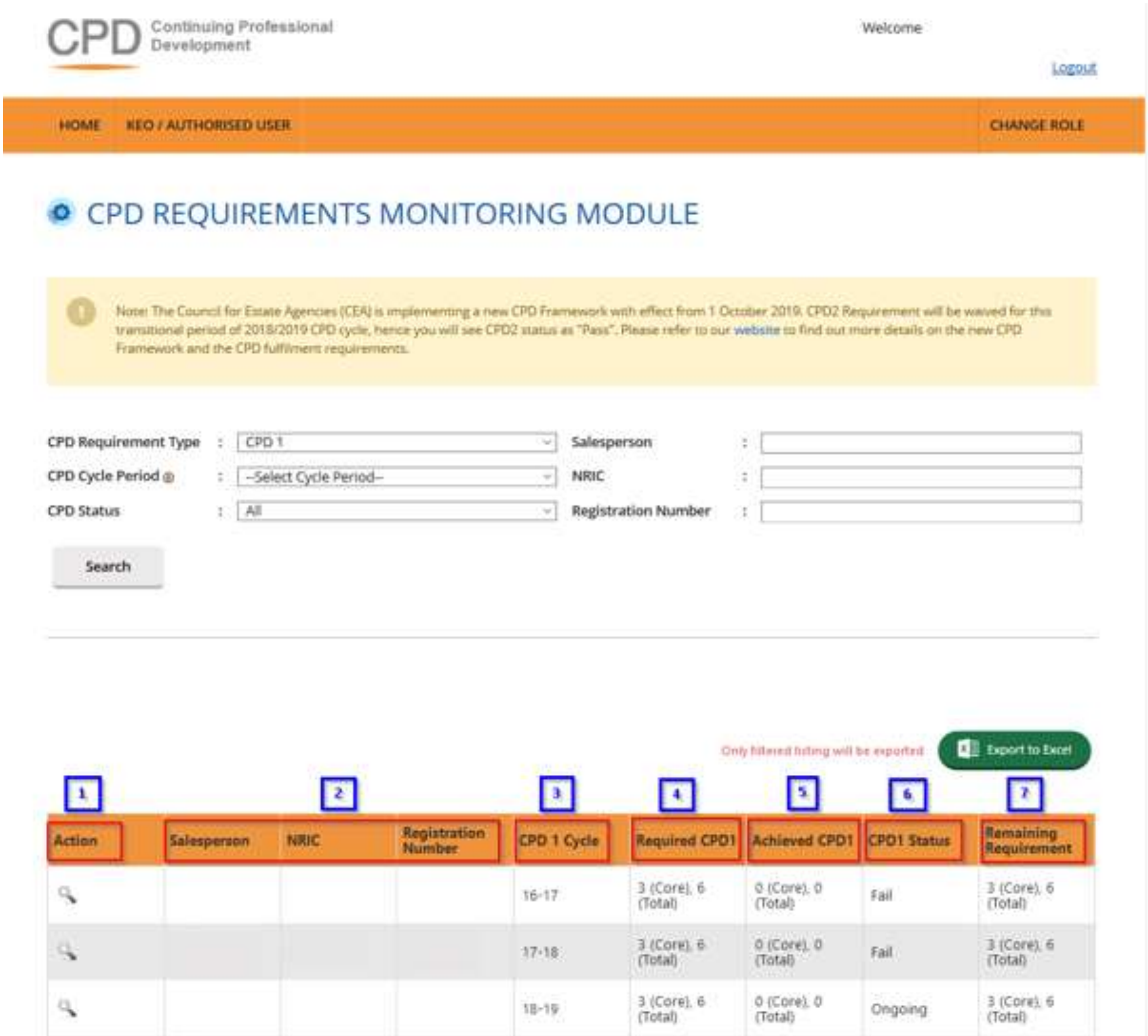


Figure 23: Requirement Monitoring Module – CPD 1

Definitions

1. **Action ( )**
   To view the details of the attendance records for a particular **CPD 1** Cycle.

2. **Personal Details**
   The respective salesperson's 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:** The salesperson is 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 the salesperson needs 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 each salesperson is required to achieve in 3 consecutive CPD Cycles.

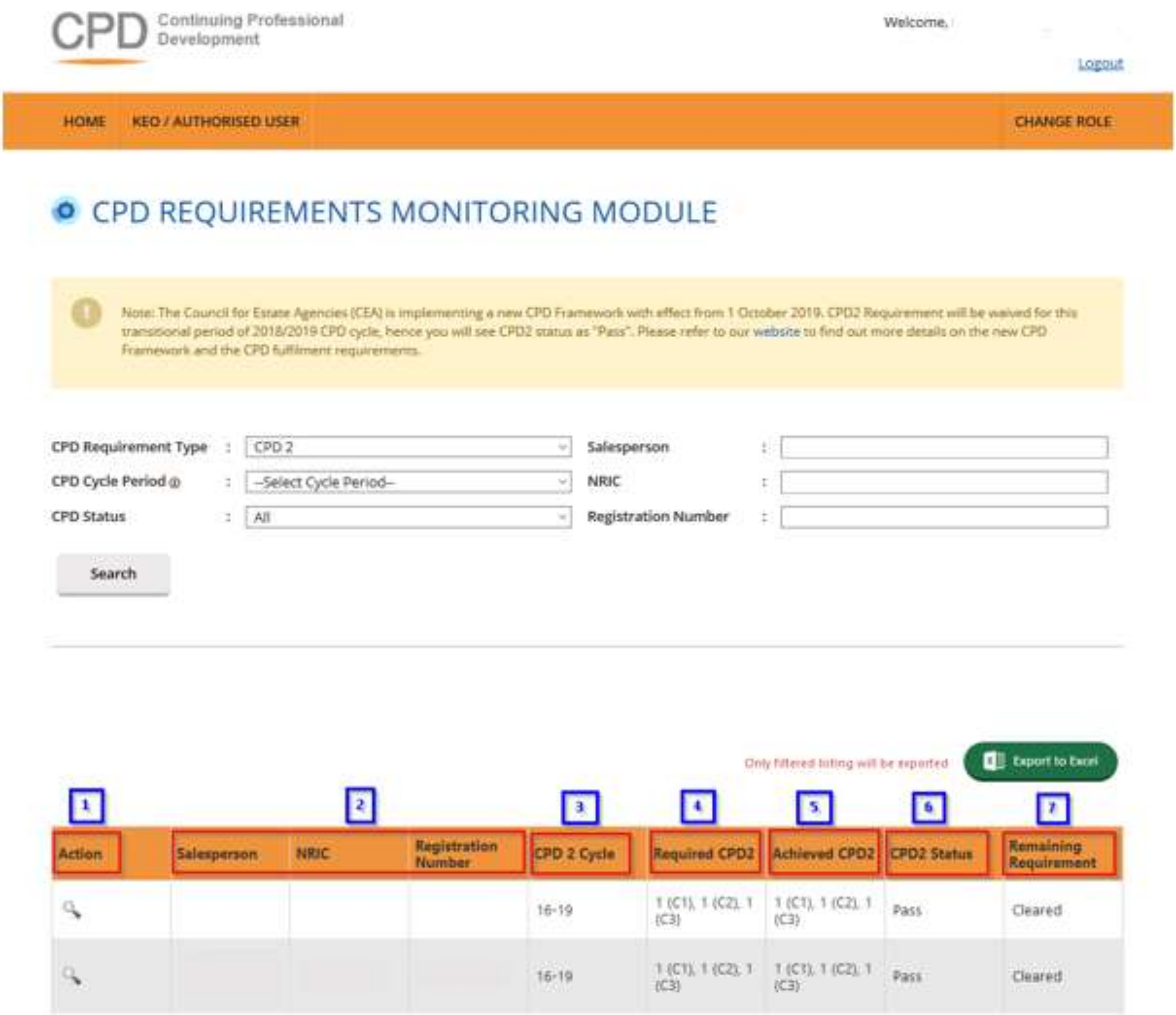


Figure 24: Requirement Monitoring Module – CPD 2

Definitions

1. **Action (🔍)**
   To view the attendance submission details for a particular **CPD 2** Cycle.

2. **Personal Details**
   The respective salesperson's name, NRIC, and registration number will be displayed.
3. **CPD 2 Cycle**
   Defined the 3 consecutive CPD Cycles applicable. E.g. "16-19" means that the 3 CPD cycles are the:
   a) 2016 CPD cycle (1 Oct 2016 to 30 Sep 2017)
   b) 2017 CPD cycle (1 Oct 2017 to 30 Sep 2018); and
   c) 2018 CPD cycle (1 Oct 2018 to 30 Sep 2019).

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 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:** The salesperson is 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 the salesperson needs 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.

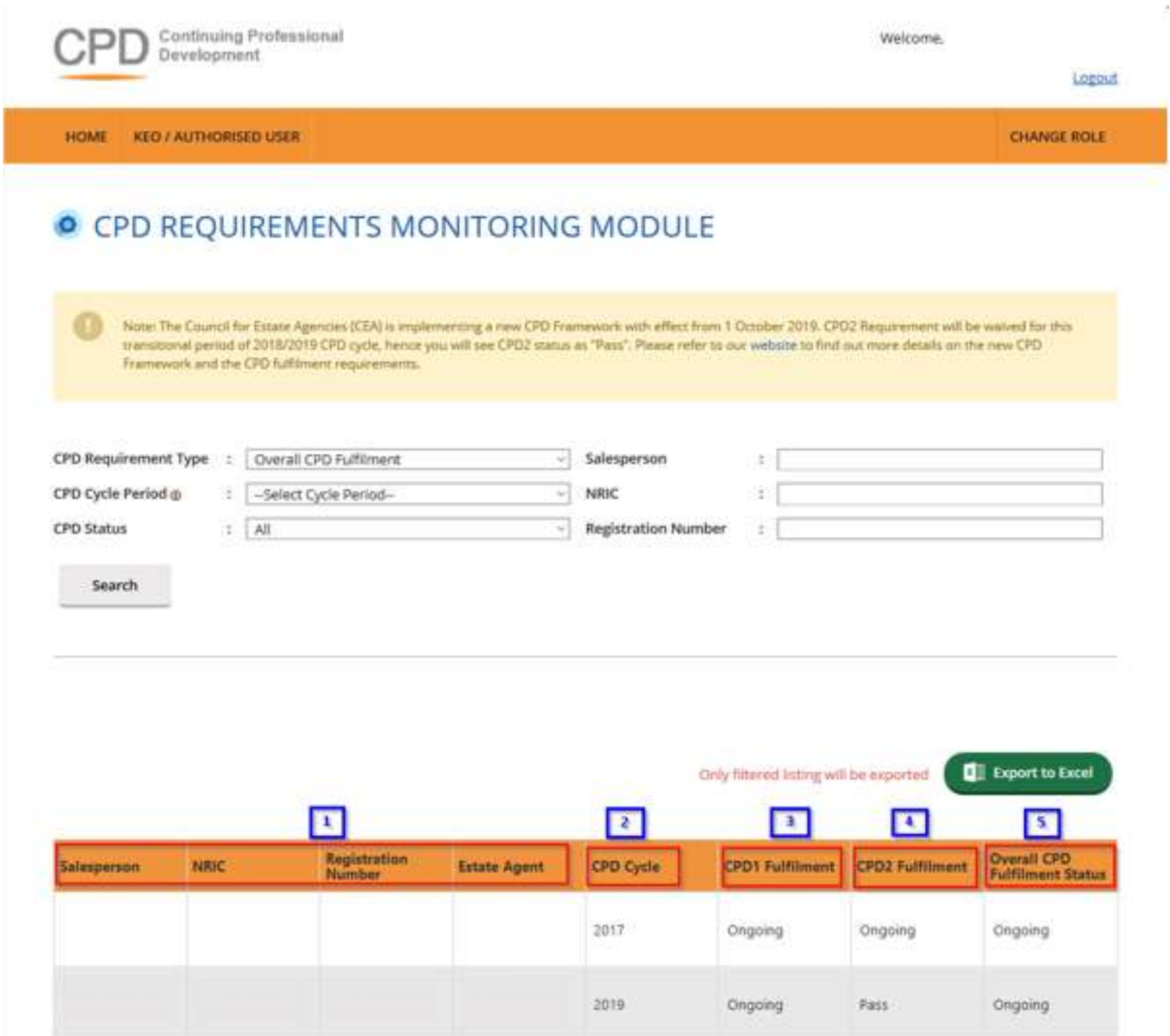


Figure 25: Requirement Monitoring Module – CPD Overall Fulfilment

Definitions

1. **Personal Details**
   The respective salesperson's name, NRIC, registration number, and the Estate Agent they 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:** The salesperson has achieved all their CPD1 requirements while the CPD overall cycle has not yet ended.
- **Ongoing:** The salesperson has not achieved all their CPD1 requirements while the CPD overall cycle has not yet ended.
- **Fail:** The salesperson has not achieved all their CPD1 requirements by the end of the year.
- **Exempted:** The salesperson is not required to fulfil their 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:** The salesperson has achieved all their CPD2 requirements while the CPD overall cycle has not yet ended.
- **Ongoing:** The salesperson has not achieved all their CPD2 requirements while the CPD overall cycle has not yet ended.
- **Fail:** The salesperson has not achieved all their CPD2 requirements by the end of the year.
- **Exempted:** The salesperson is not required to fulfil their 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**.

Table 1. CPD Overall Status Scenario

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
Exempted	Exempted	Exempted

5. 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:

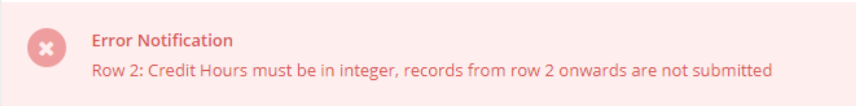
#1	Error Notification No file or Invalid file format
Possible Causes	(1) No file selected (2) Select file other than CSV file
How to Rectify	(1) Select a CSV file to use (2) Select only CSV file and download the sample CSV file

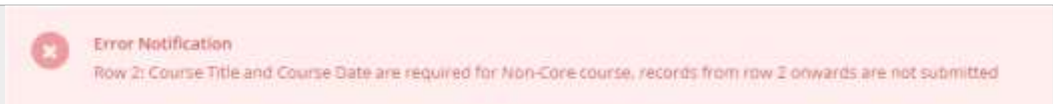
#2	Error Notification Incorrect file format is used, please follow the provided format
Possible Causes	Using wrong CSV format that is not supposed to be used by KEO. i.e CP attendance submission form
How to Rectify	Using the CSV format provided in the sample CSV file

#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 sub
Possible 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: KEO/SP are not allowed to submit attendance for core activity, records from row 2 onwards are not submitted
Possible Causes	Using CSV format for KEO, but Activity Type filled with "Core"
How to Rectify	Amend the CSV file with Activity Type "Non-Core" as KEO can only submit Non-Core attendance

#6	
Possible Causes	One of the record’s credit hours filled with either blank or string
How to Rectify	Make sure that the credit hours are in number format

#7	
Possible Causes	One of the record’s course title and/or course date filled with blank
How to Rectify	Make sure that the course title and course date filled completely

#8	
Possible Causes	Wrong date format used in the column Course Start Date and Course End Date
How to Rectify	Make sure the CSV file is following the correct date format DD-MM-YYYY or DD/MM/YYYY

#9	
Possible Causes	The Activity type left blank or filled with text other than “Non-Core”
How to Rectify	Make sure the Activity type column filled with only “Non-Core”

#10	
Possible Causes	(1) Using CSV file without column header (first row) that is provided in the CSV sample file (2) Course end date not filled, or course start date is using wrong format (3) Using CSV but not with KEO format
How to Rectify	(1) Use the sample CSV file as there the column header is already provided (2) Fill the course start date and end date with correct format (3) Using the correct format for KEO