Council for Estate Agencies

My CPD Portal

User Manual – Estate Agent

Document Change History

Version	Date	Description
Version 1.0	3 Mar 2017	Initial Release

Contents

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1. Introduction

"My CPD Portal" is a dedicated platform that enables Key Executive Officers (KEOs) and their Salespersons to manage their continuing professional development (CPD) training needs. The portal:

- Allows course providers to introduce new courses and seek approval from CEA to conduct them;
- Keeps course providers updated on their application status;
- Allows course providers to update course sessions and trainers for approved courses;
- Allows KEOs and Salespersons to update CPD attendance records;
- Allows KEOs and Salespersons to rate the core CPD courses that they attend;
- Allows Salespersons/KEOs to track their CPD requirement fulfilment statuses; and
- Allows KEOs to approve non-core CPD courses taken by their Salespersons.

2. KEO/Authorised User

The KEOs and their authorised users can use this system to:

- Submit KEOs' CPD course attendance records;
- Submit CPD course attendance records of Salespersons under the Estate Agent;
- Approve the non-core CPD attendance records submitted by the Salespersons;
- Monitor the CPD fulfilment statuses of Salespersons under the Estate Agent.

KEOs can also view upcoming courses to plan their training schedules, and rate courses that they have attended.

3. Login

Go to the CPD microsite at www.cea.gov.sg/cpd. Click on *My CPD Portal* on the right of the navigation bar as shown below:

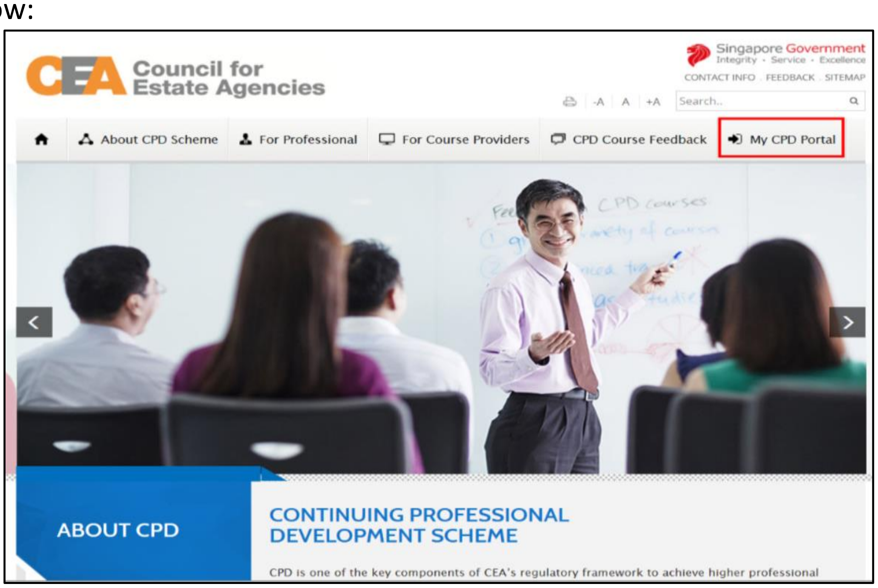

Figure 1: Login tab for *My CPD Portal* on CPD Microsite

Key in your SingPass ID and Password as shown below:

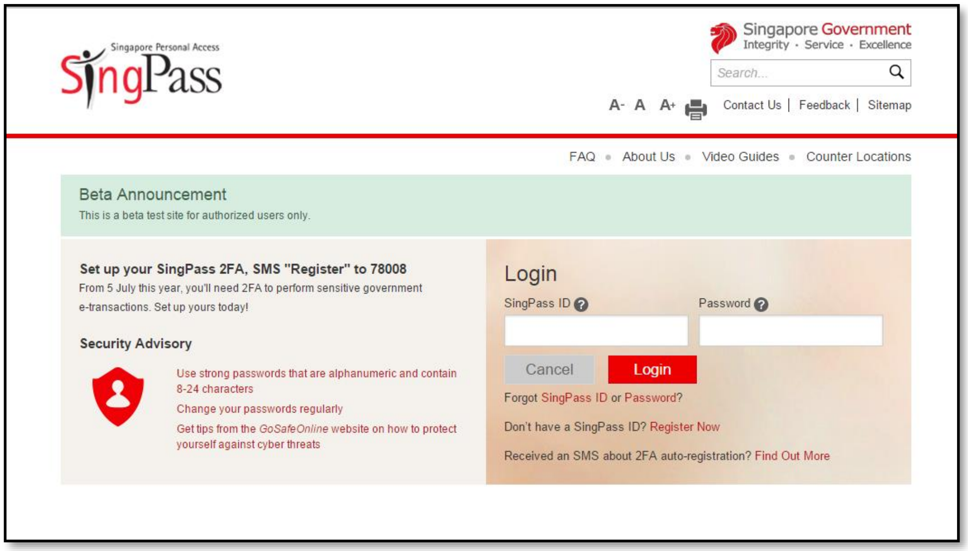

Figure 2: Singpass Login Page

Once logged in, you will see the dashboard below if you have multiple roles in the CPD System e.g. as Course Provider or Salesperson. Otherwise 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 4**.

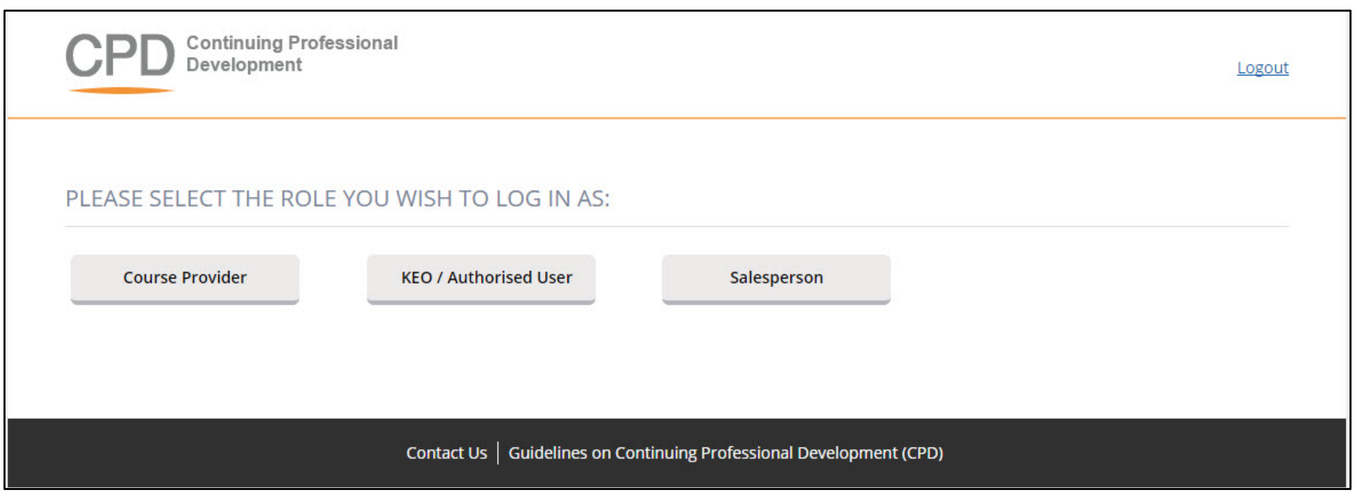

Figure 3: Multi-Role Dashboard

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

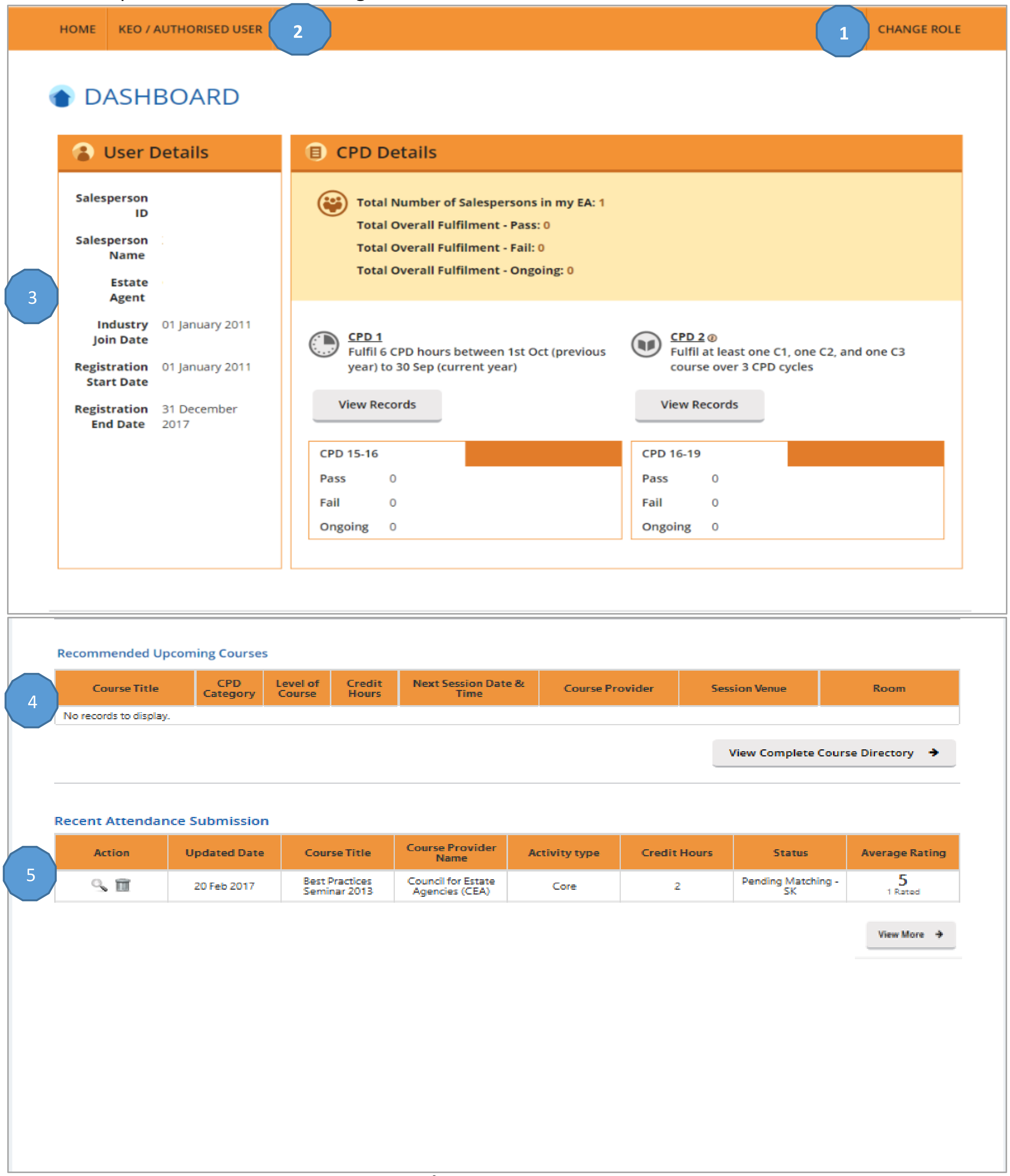

Figure 4: KEO/ Authorised User Dashboard

Description of features (Figure 4):

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 this tab to check the list of e-services that are provided for KEO/ Authorised User.

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 in the Estate Agent
   - The total number of Salespersons that fulfil or did not fulfil the "Credit Hours Fulfilment (CPD1) and/or the Core Category Fulfilment (CPD2). Click **View Records** to view the detailed records.

4. **Recommended Upcoming Courses**
   This panel shows the upcoming core CPD courses for the core categories which the Salespersons require.

5. **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 6**.

3.1. Attendance Management

This function is for the KEO / Authorised User to:

- Submit attendance for core and non-core CPD courses for the KEO;
- Submit attendance for core and non-core CPD courses for their Salespersons; and
- Approve non-core CPD attendance records submitted by their Salespersons.

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

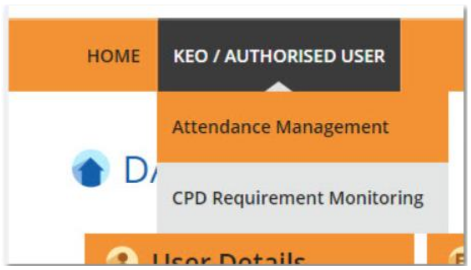

Figure 5: KEO / Authorised User tab dropdown menu: Attendance Management

You will be directed to the page shown in **Figure 6.**

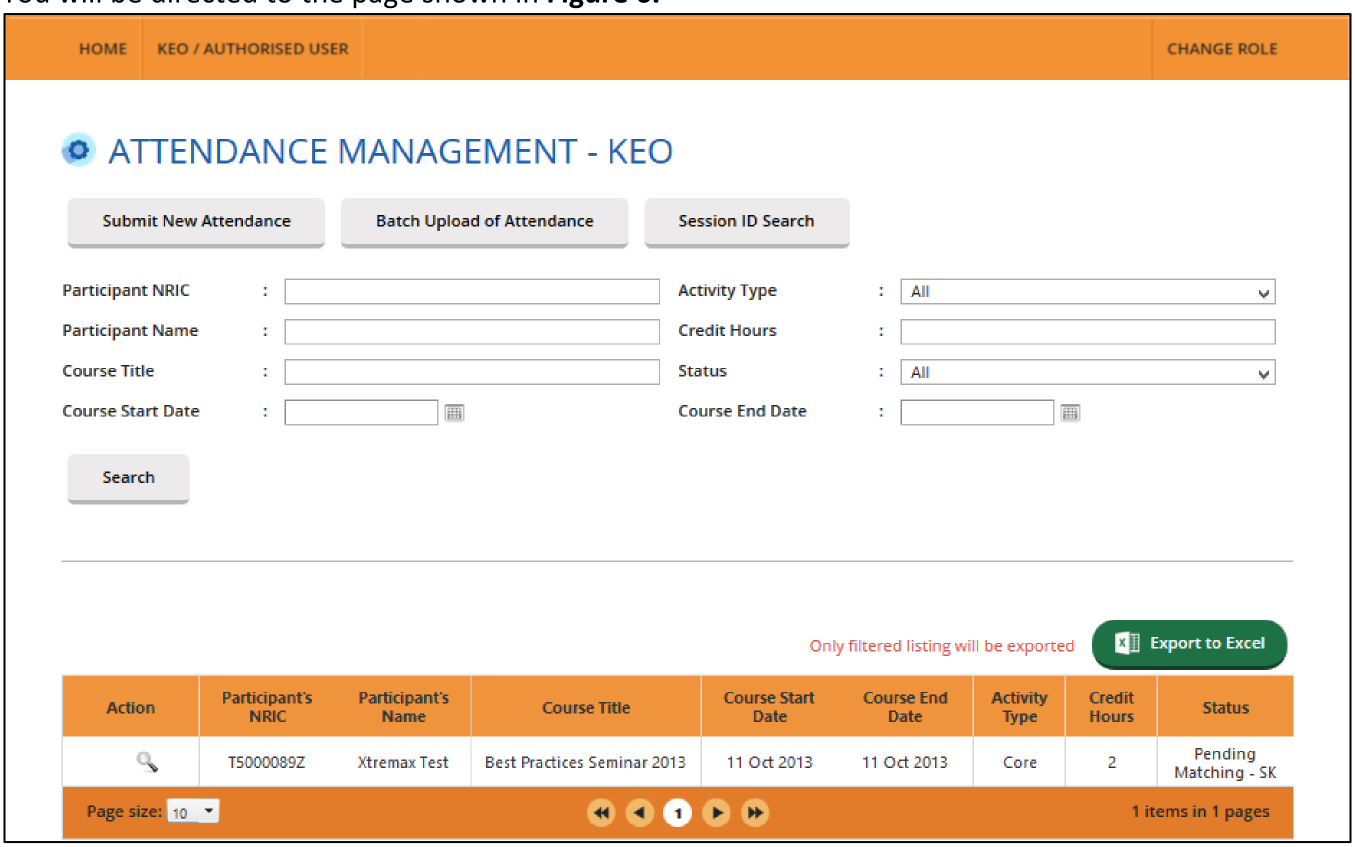

Figure 6: Attendance Management – KEO / Authorised User

3.1.1. Submit New Attendance

To submit an attendance record for your KEO or Salesperson, click the **Submit New Attendance** button and you will see the pop-up shown in **Figure 7a**.

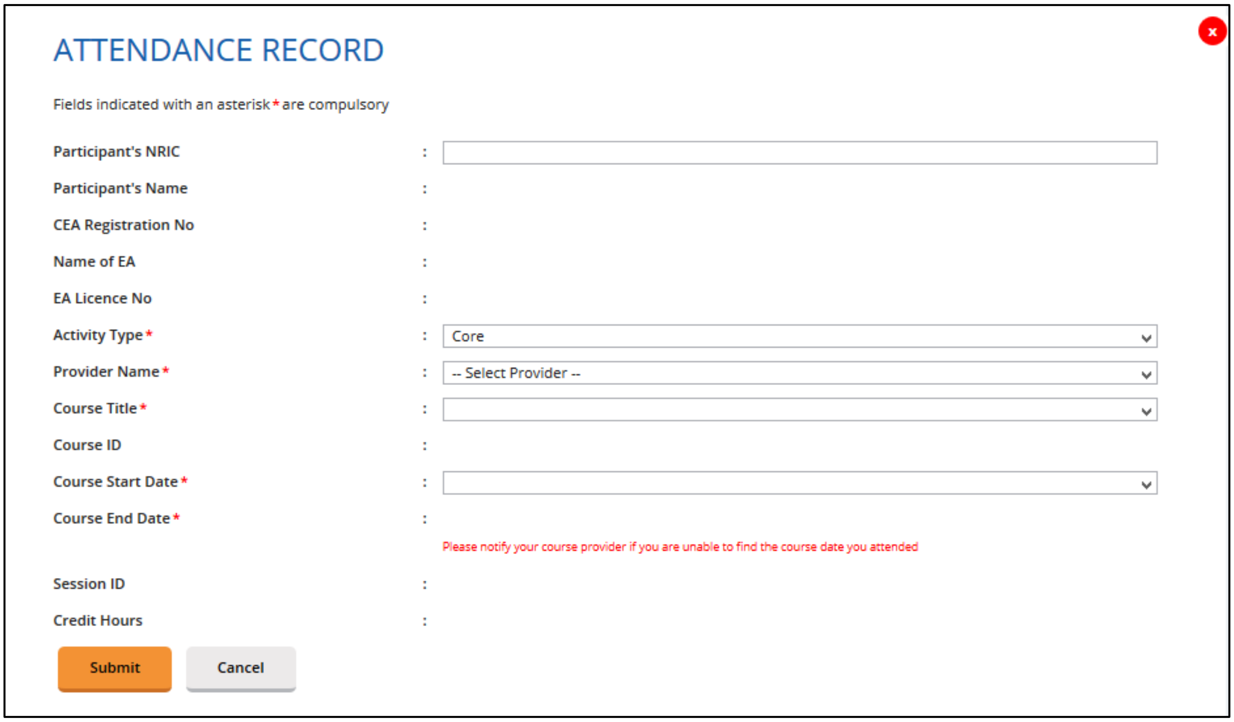

Figure 7a: Submit New Attendance – Core CPD Course

Steps to Update the Attendance Record

<u>Core CPD courses (Figure 7a)</u>

1. Key in the **Salesperson's NRIC**. The first four fields - Salesperson Name, CEA Registration Number, Name of EA, and EA Licence No, will be auto-populated.
2. Select the **Activity Type** from the dropdown list.
    a. Select "Core". The names of course providers will be displayed in the **Provider Name** dropdown list. Select the course provider.
    b. Under the **Course Title**, the courses conducted by the selected course provider will be displayed in the dropdown list. Select the course.
    c. Select the start and end dates from the dropdown lists under **Course Start Date** and **Course End Date**. The fields for Session ID and Credit Hours will be auto-populated based on the selected course dates.
3. Click **Submit** once you have updated all the fields. There will be a pop-up notification informing that the attendance has been submitted successfully.

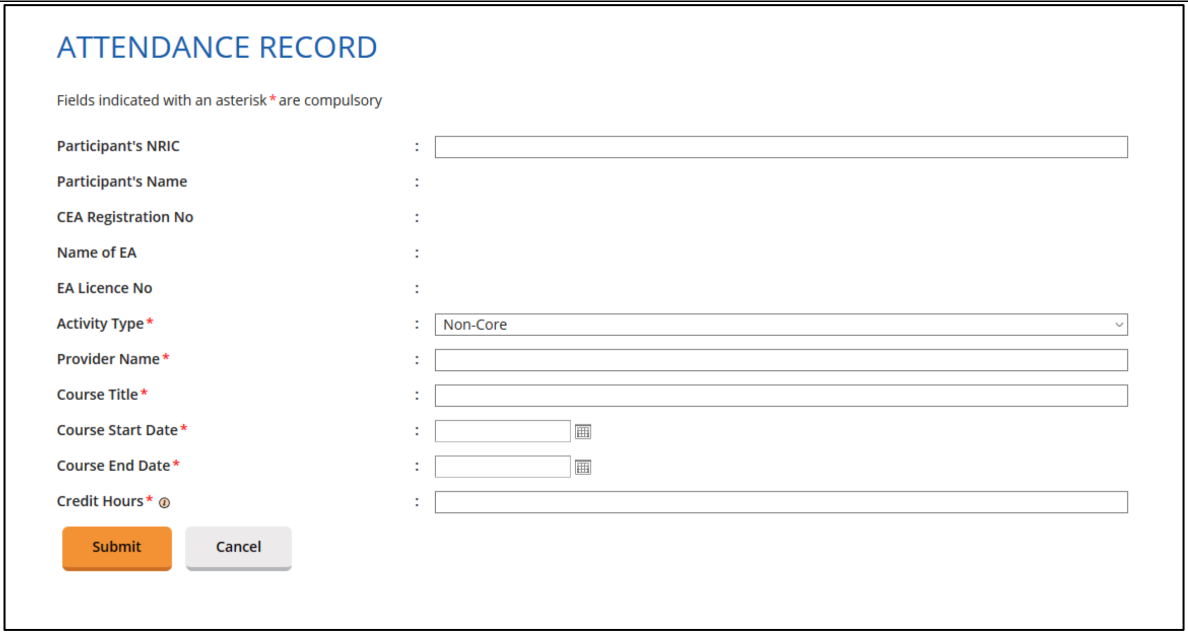

Figure 7b: Submit New Attendance – Non-Core CPD Course

<u>Non-Core CPD Courses (Figure 7b)</u>

1. Select “Non-Core”. A text box will appear. Please key in the course provider’s name.
2. Under **Course Title**, enter the course title in the text box provided.
3. Fill in the information for **Course Start Date**, **Course End Date** and **Credit Hours** using the text boxes provided.
4. 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 8**.

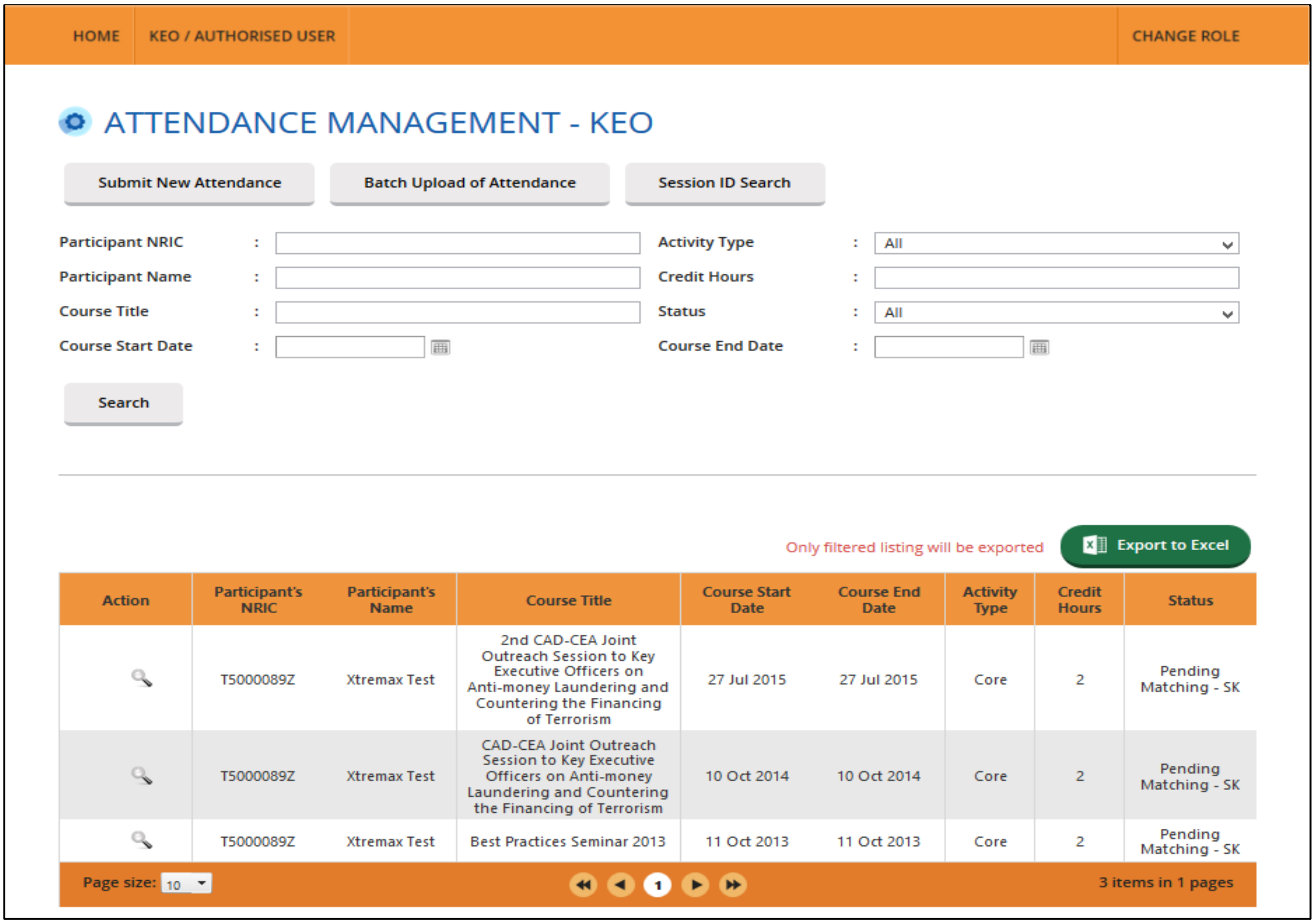

Figure 8: Attendance Record List

3.1.2. Batch Upload of Attendance

To update multiple attendance records for core and non-core CPD courses, click **Batch Upload of Attendance** button. The following screen will appear.

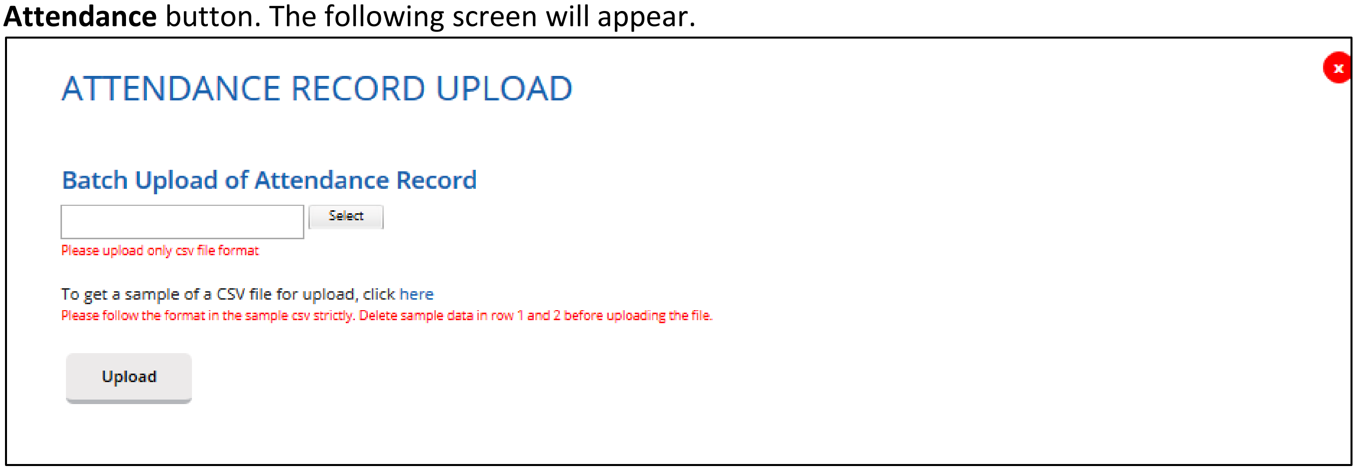

Figure 9: Batch Upload of Attendance

Steps for Batch Upload of Attendance

1. Select the attendance file that you wish to upload. Only the file format .**CSV is allowed.**
2. Click the link to download a sample of the CSV file if you do not have the CSV file for uploading.
3. Key in the required information in the CSV file.
    - For entries on dates, the dates should be in **DD-MM-YYYY or DD/MM/YYYY** format.
4. Click **Upload** to submit the file.

If all the records are successfully uploaded, a pop-up notification message will appear. (Refer to **Figure 10**).

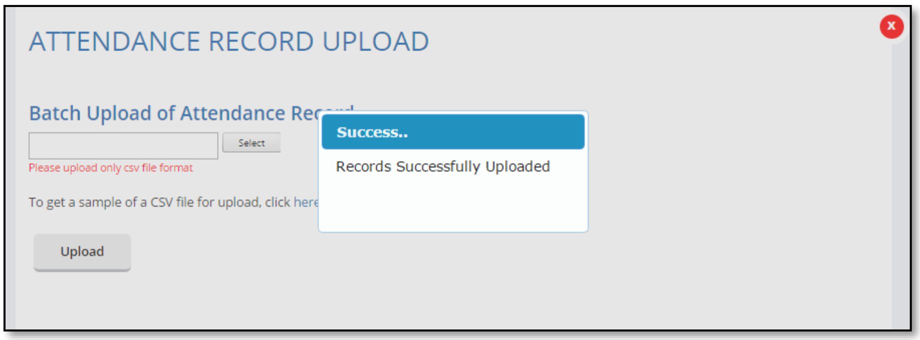

Figure 10: Batch Upload of Attendance – Success Notification

If any record fails to upload, an error notification message will appear. (Refer to **Figure 11**). **Please note that if any record in the CSV file fails to upload, this record and those in subsequent rows in the CSV file will not be uploaded.** For example, if there is an error in a record in row 3, only the records in rows 1 and 2 will be successfully uploaded. The remaining records in the file will not be uploaded. **Please correct the error and repeat the steps in para 3.1.2 to update the attendance records.**

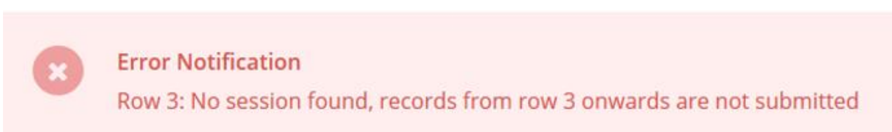

Figure 11: Batch Upload of Attendance – Error Notification Example

3.1.3. Session ID Search (for core CPD course only)

For updates using CSV files, the session ID is required for core CPD courses. You can retrieve the session ID by clicking on the **Session ID Search** tab. The **Session ID Search** pop up will appear as shown below.

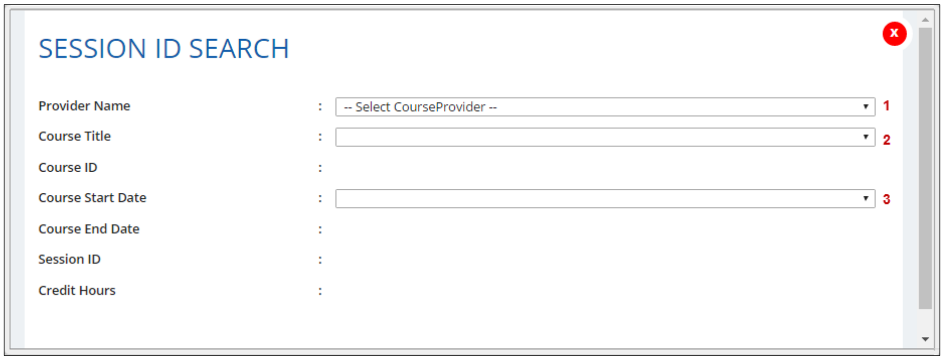

Figure 12: Session ID Search

To retrieve the session ID for a core CPD course:

1. Select the Course Provider from the dropdown list.
2. Select the Course Title from the dropdown list.
3. Select the Course Start Date from the dropdown list. The fields for Course End date, Session ID and Credit Hours will be auto-populated based on the selected Course Start Date.

3.1.4. 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 next to the record. The attendance record will appear in a pop-up window as shown in **Figure 14**.

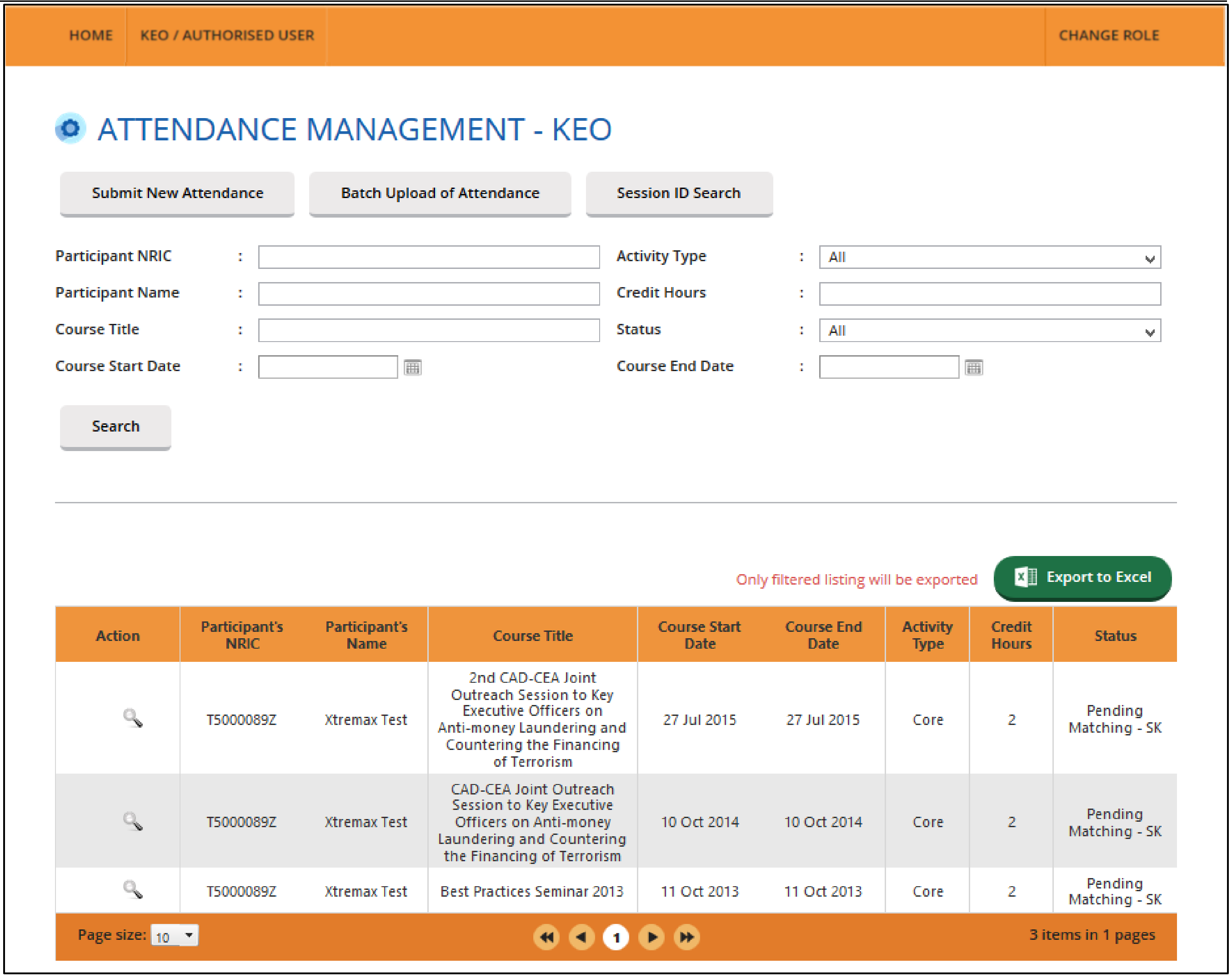

Figure 13: Attendance Record List

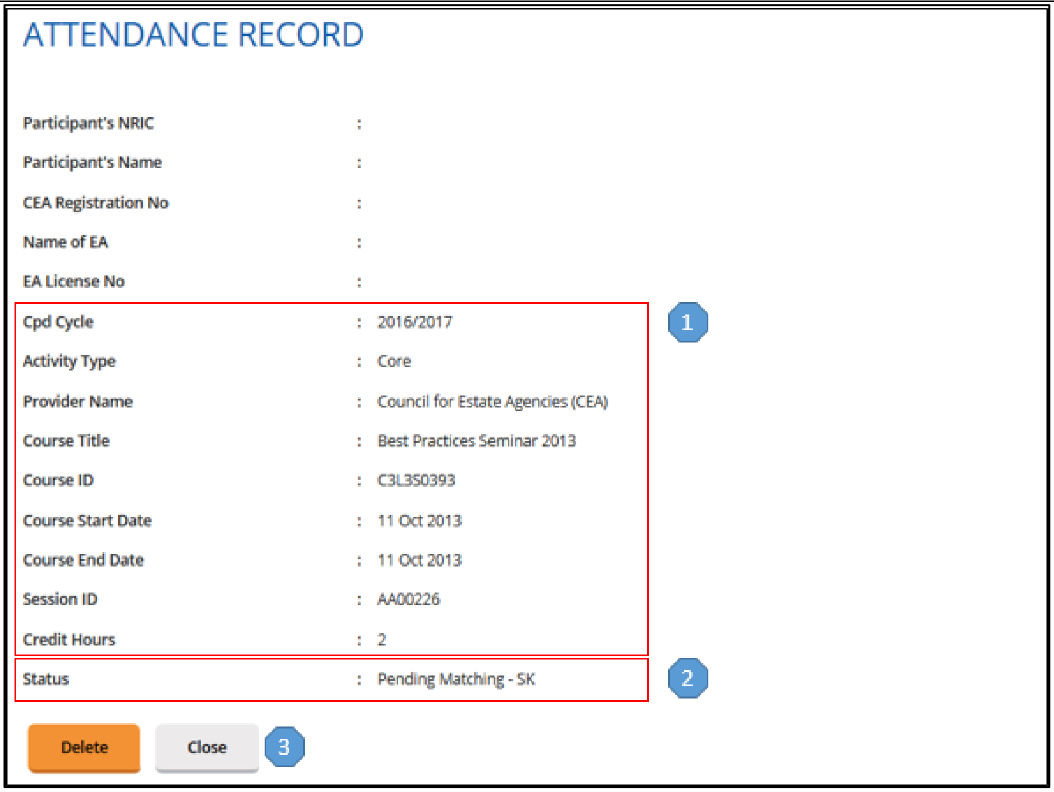

Figure 14: View Attendance Record

Description (Figure 14):

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

2. **Delete this record**
   You can only delete records with a "Pending Matching" status.

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

3.1.5. **Searching Attendance Record**

You can look for a particular Salesperson's attendance record by using the following filters under the **Attendance Management** page (refer to **Figure 15**):

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

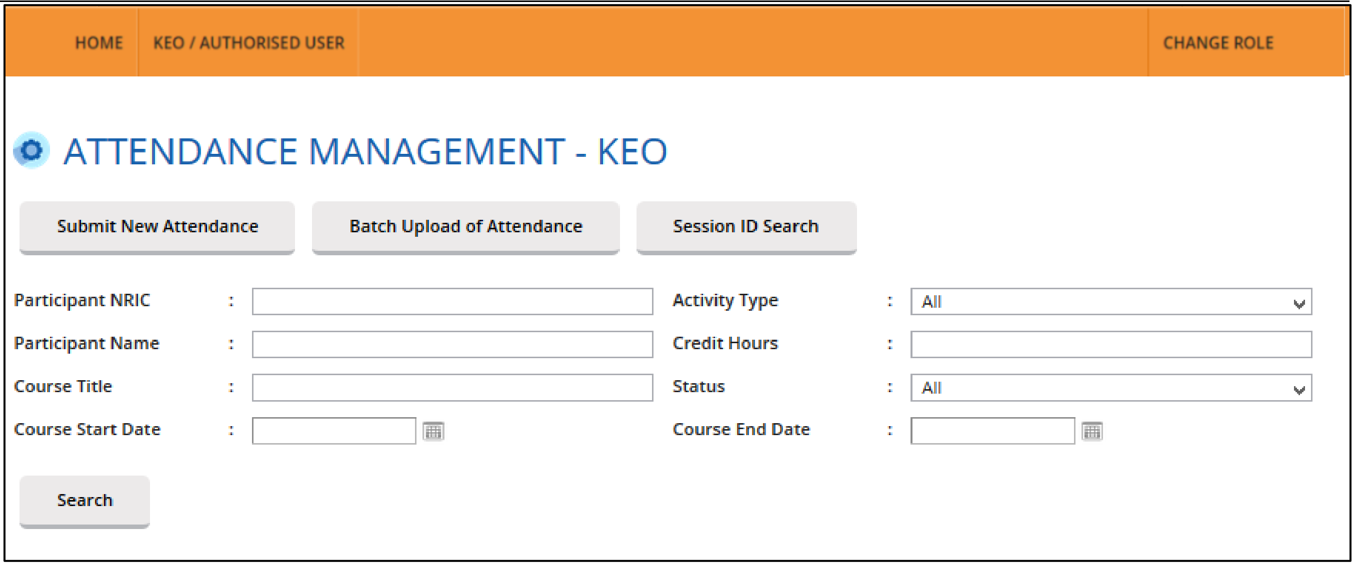

Figure 15: Search Attendance Record

3.1.6. Export Attendance Record

To download a report of your attendance records, click the **Export to Excel** button on the top right of the table. The attendance file will be downloaded.

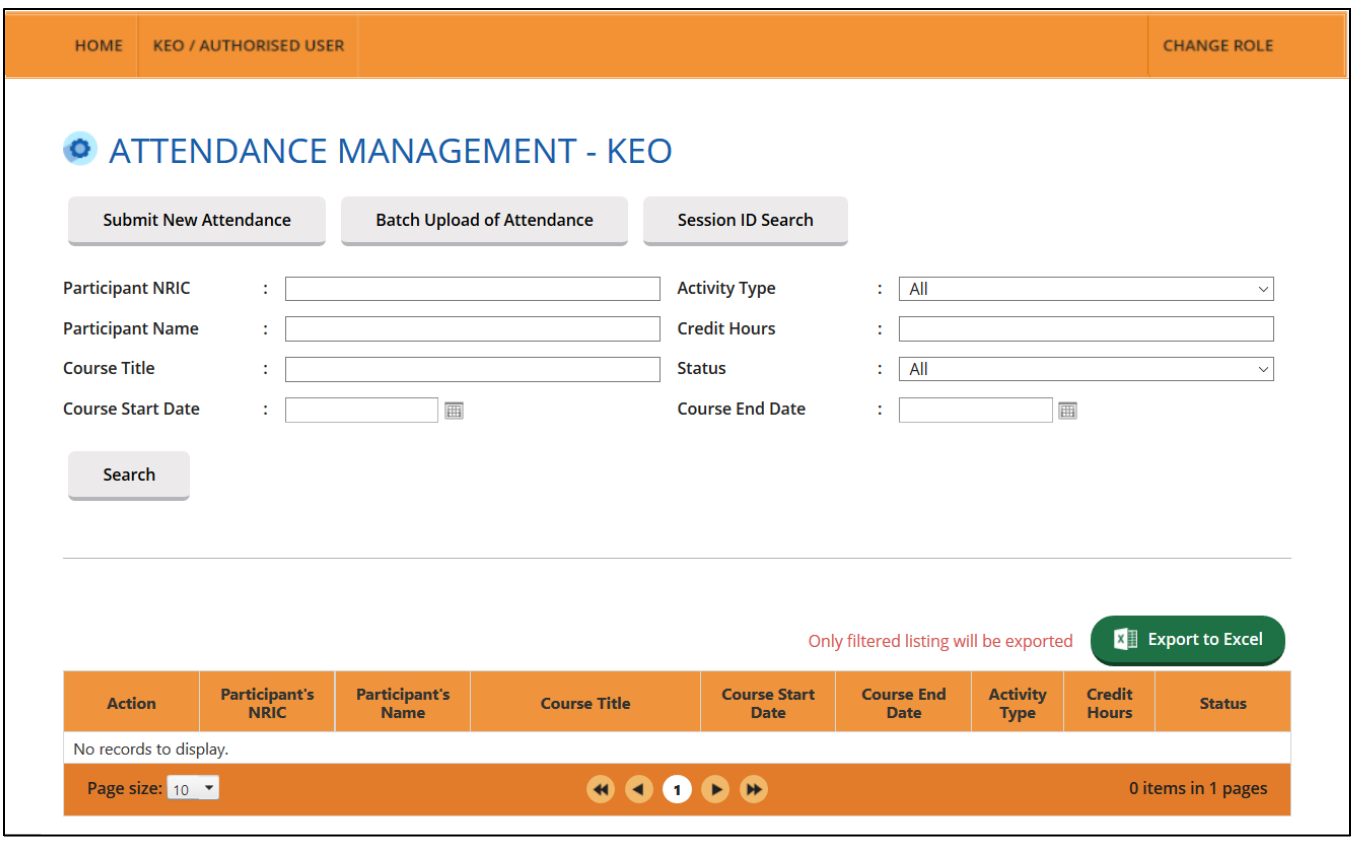

Figure 16: Export Attendance Record

3.2. CPD Requirement Monitoring

This function is for the KEO/ Authorised User to **track the CPD requirement fulfilment status** of your Salespersons for a particular CPD cycle. Click on **KEO / Authorised User >> CPD Requirement Monitoring**.

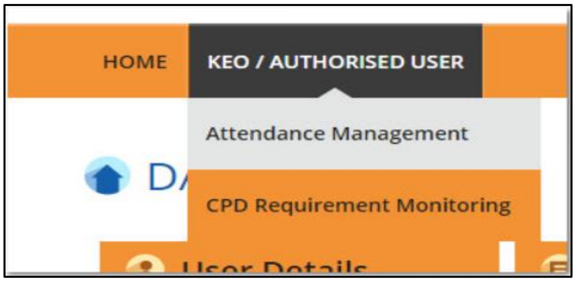

Figure 17: KEO / Authorised User– CPD Requirement Monitoring

3.2.1. 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**.

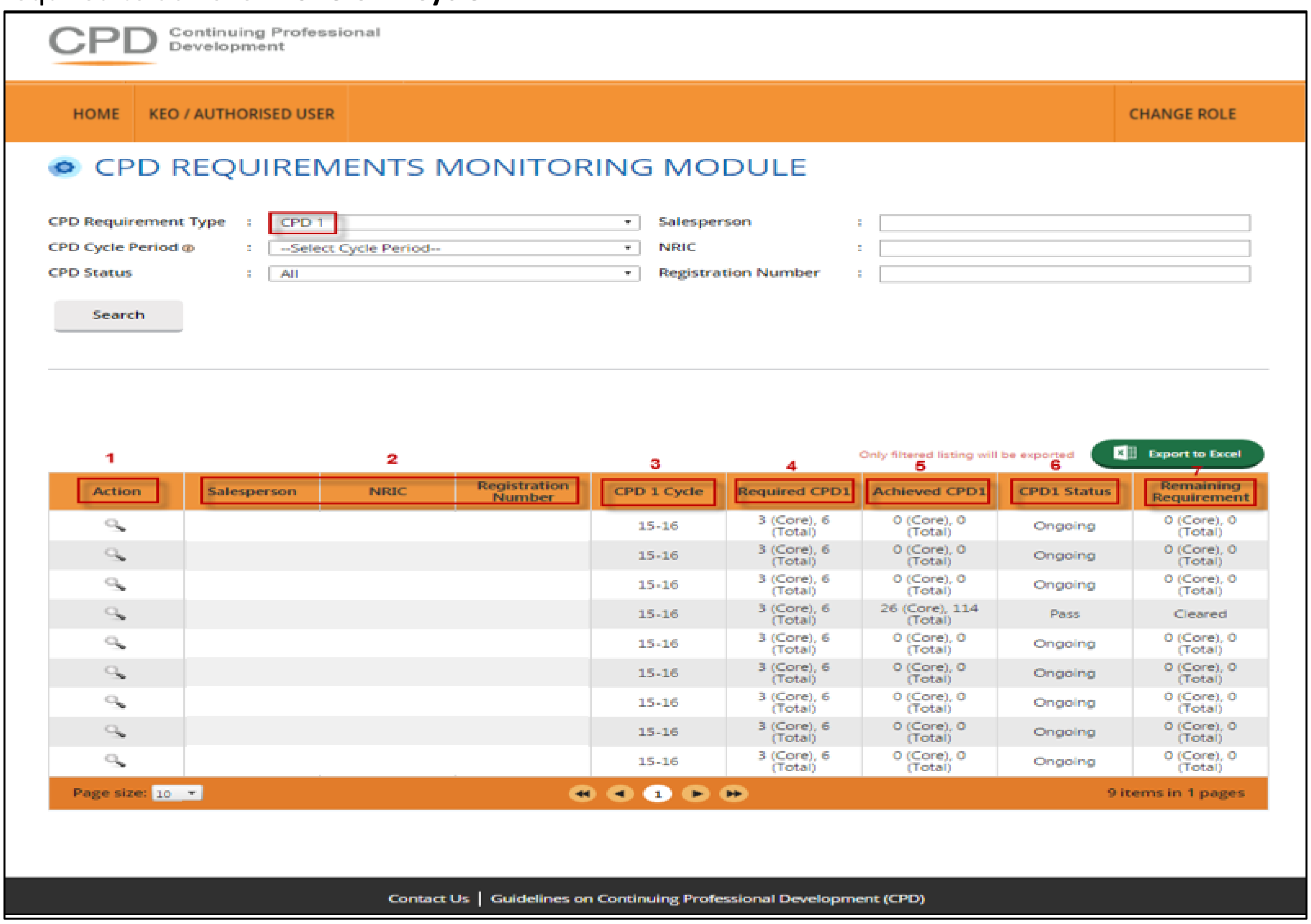

Figure 18: Requirement Monitoring Module – CPD 1

Definitions (Figure 18)

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

2. **Personal Details**
   Details include **Salesperson Name**, **NRIC** and **Registration Number**.

3. **CPD 1 Cycle**
   Defines the **CPD 1** Cycle referred to in the Salesperson's record (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** in a particular **CPD 1** cycle.

5. **Achieved CPD 1**
   Number of **core** and **total credit hours achieved** by the Salesperson in a particular **CPD 1** cycle. This is based on the attendance records submitted in the system.

6. **CPD 1 Status**
   A Salesperson's current **CPD 1** fulfilment status for a particular **CPD 1** Cycle:
   - **Pass**
     The **credit hours achieved** <u>met</u> the **required credit hours** for that particular **CPD 1** Year Cycle.

   - **Fail**
     The **credit hours achieved** <u>did not meet</u> the **required credit hours** by the end of a particular **CPD 1** Year Cycle.

   - **Ongoing**
     The **credit hours achieved** <u>have not met</u> the **required credit hours** and the **CPD 1** Cycle has not ended.

   - **Exempted**
     The Salesperson is exempted from the CPD requirements for that particular **CPD 1** Cycle.

7. **Remaining Requirement**
   - **NA**
     This means that the CPD requirements for that particular **CPD 1** Cycle are not applicable to the Salesperson.

   - **Cleared**
     This shows that the Salesperson has fulfilled his/her CPD requirements for that particular **CPD 1** Cycle.

- **(with Core and Total Hours remaining)**
  This shows the **remaining core** and **total credit hours** that the Salesperson has to complete for a particular **CPD 1** Cycle.

3.2.2. 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.

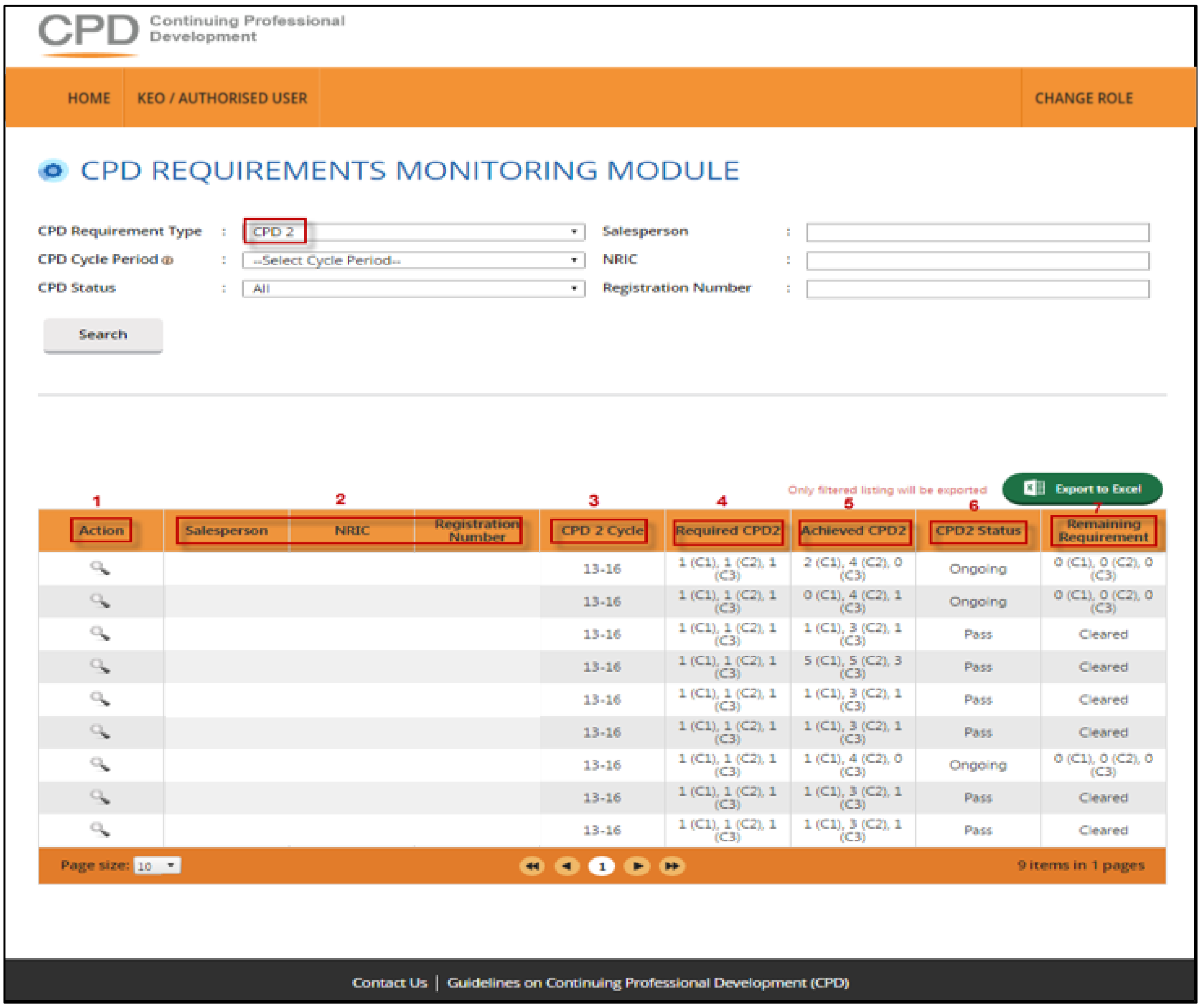

Figure 19: Requirement Monitoring Module – CPD 2

Definitions (Figure 19)

1. **Action ( )**
   To view the details of the attendance records for a Salesperson in a particular **CPD 2** Cycle.

2. **Personal Details**
   Details include **Salesperson Name**, **NRIC** and **Registration Number**.

3. **CPD 2 Cycle**
   Defines the 3 consecutive CPD Cycles that are covered in each record. E.g. "13-16" refers to the following 3 CPD cycles:
   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** under **each Core Category** (C1, C2, and C3) in a particular **CPD 2** Cycle.

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

6. **CPD 2 Status**
   A Salesperson's current **CPD 2** fulfilment status for a particular **CPD 2** Cycle:
   - **Pass**
     The **course sessions achieved** <u>met</u> the **required course sessions** under **each Core Category** (C1, C2, and C3) for that particular **CPD 2** Cycle.

   - **Fail**
     The **course sessions achieved** <u>did not meet</u> the **required course sessions** under **each Core Category** (C1, C2, and C3) by the end of that particular **CPD 2** Cycle**.**

   - **Ongoing**
     The **achieved course sessions** <u>have not met</u> the **required course sessions** under each Core Category and that particular **CPD 2** Cycle has not ended.

   - **Exempted**
     The Salesperson is exempted from the CPD requirements for that particular **CPD 2** Cycle.

7. **Remaining Requirement**
   - **NA**
     This means that the CPD requirements for that particular **CPD 2** Cycle are not applicable to the Salesperson.

   - **Cleared**
     This shows that the Salesperson has not completed the CPD requirements for that particular **CPD 2** Cycle.

   - **Number of sessions remaining (Core Category)**
     This shows the remaining course sessions that the Salesperson has to complete under each Core Category in that particular **CPD 2** Cycle