

CPDOnline User Guide



March 2017

Contents

About us

About this guide

Introduction to CPDOnline

1. Getting started: System requirements
2. Logging in to CPDOnline
 - How can I get a reminder of my user details for CPDOnline?
3. Using the software: the Menu page
4. Making your first CPD entry
 - Learning that starts at reflection
 - Marking a CPD entry as complete
5. Saving, deleting and organising your CPD entries
 - Saving and deleting entries
 - Organising your entries
6. Properties
 - Viewer function
 - GPhC access, confidentiality and submitting your record for review
7. Printing your CPD entries
8. Submitting your CPD record to the GPhC for review

About us

The General Pharmaceutical Council is the regulator for pharmacists, pharmacy technicians and registered pharmacy premises in England, Scotland and Wales.

About this guide

This guide has been prepared to provide guidance to pharmacy professionals on how to use the GPhC's online recording system, available at www.uptodate.org.uk. It may also be of interest to employers of pharmacy professionals.

September 2016 Update:

The paper submission facility has been withdrawn from the regular methods for submission of CPD entries, with effect from **January 2016**.

97.5% of registrants submitted their CPD via [CPDOnline](#) during the 2014-15 Call and Review cycle.

If you are asked to submit your CPD entries in the Call and Review cycle, and you have **exceptional** circumstances which prevent you from submitting online, you may be eligible to submit by paper. If this is the case and you have been called to submit, please [contact us](#) after reviewing the [guidance and instructions](#) available to you.

Introduction to CPDOnline

This user guide contains information about how to use the General Pharmaceutical Council's online CPD recording system. We recommend that you also refer to our [standards for CPD](#) and our [CPD framework](#) which set out in detail our requirements for undertaking and recording CPD. We have also prepared a guidance document, [Plan and Record](#) which provides more detailed information about CPD and how to record it. All of these documents are available to download from our website at www.pharmacyregulation.org.

Recording your CPD using our online CPD recording system, available at www.uptodate.org.uk has a number of advantages over recording on paper. The advantages include:

Security and ease of access: Your CPD record will be backed up on a server at regular intervals so you do not need to worry about keeping your CPD entries safe.

Data protection: The GPhC is not able to view your CPD record unless you have submitted it for review.

Access to your CPD record using a PC, laptop or tablet from anywhere with an internet connection: This may be useful, for example, if you work across multiple sites or you need to access your CPD record while attending a conference. Using a Wi-Fi-enabled laptop, you can log into your CPD record from anywhere that has Wi-Fi access.

Share selected parts of your CPD with others

CPDOnline users can set up viewers (people who can look at their CPD entries such as friends, colleagues, facilitators and employers) who can see what is within your control. Simply give a viewer a unique username and password and tick which CPD entries you want them to be able to review.

Have your CPD record reviewed more quickly: When your CPD record is called for review, if you submit your CPD record online it is automatically placed in the queue for reviewing.

More detailed feedback after submission and review: CPDOnline users have access to a detailed online feedback report in addition to the executive summary that is sent in the post.

1. Getting started: System requirements

The system requires a PC, Mac, tablet or smartphone.

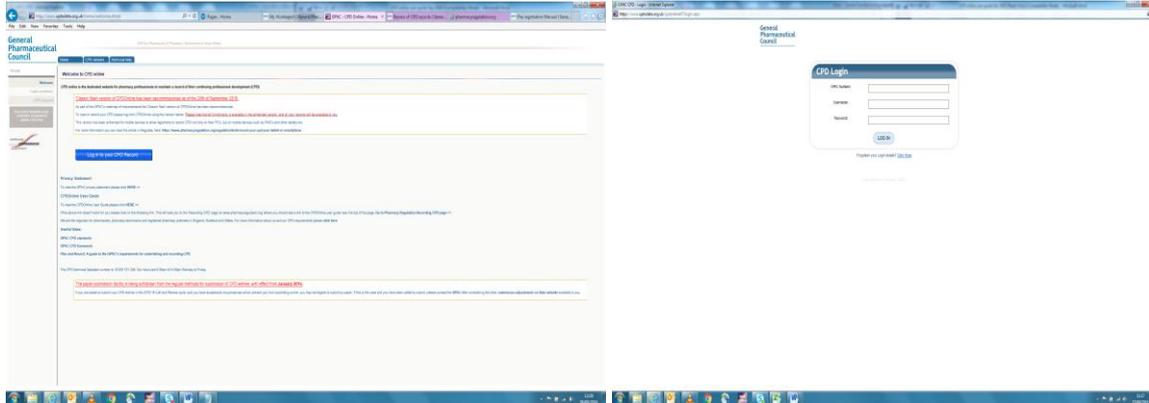
You will also require:

- An internet connection
- Web browser (Internet Explorer 9 or later, Google Chrome, Mozilla Firefox, Safari, etc.).

NB. If your PC/Mac is part of a corporate network and there are network restrictions in place, you may need to contact your IT department to access it.

2. Accessing CPDOnline

To access CPDOnline all you need to do is visit www.uptodate.org.uk and click on the blue 'log into your CPD record' button in the centre of the screen.



Insert your GPhC registration number (or, if you are a preregistration trainee pharmacist, your preregistration number), username and password into the relevant boxes and click the blue 'log in' button. If you have forgotten any of your user details click on the relevant button marked "Forgotten Your....." for instructions on what to do next.

If, having followed these instructions, you are unable to log in to your CPD record, please contact the CPDOnline technical helpline on **01225 428967** or by e-mailing helpdesk@coacs.com.

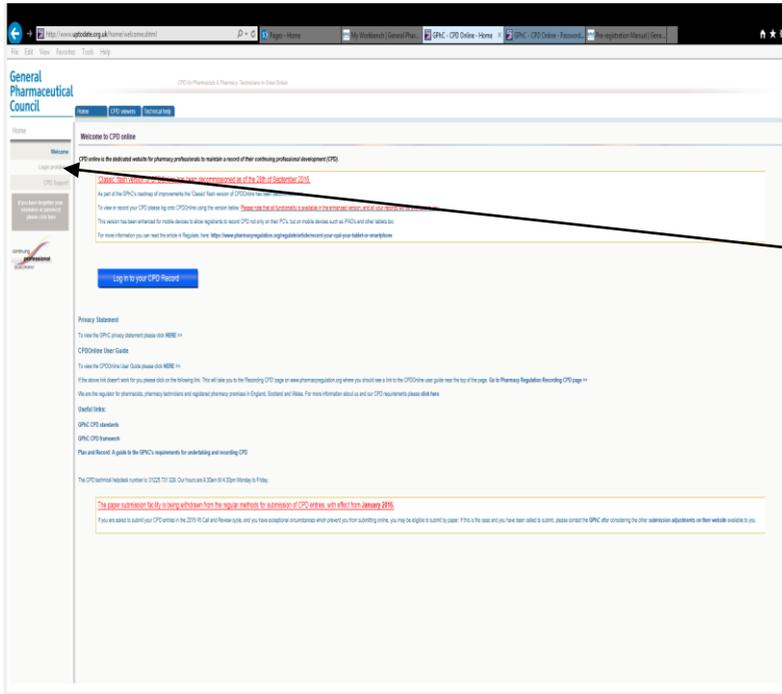
The first time you log in to your CPD record you will be asked to supply a question and answer that will be used to check your identity should you forget your password and need a reminder. It is also recommended that once you are logged into the system you change your username and password to something that you can more easily remember.

For instructions on how to make an entry in your CPD record, please go to section 4.

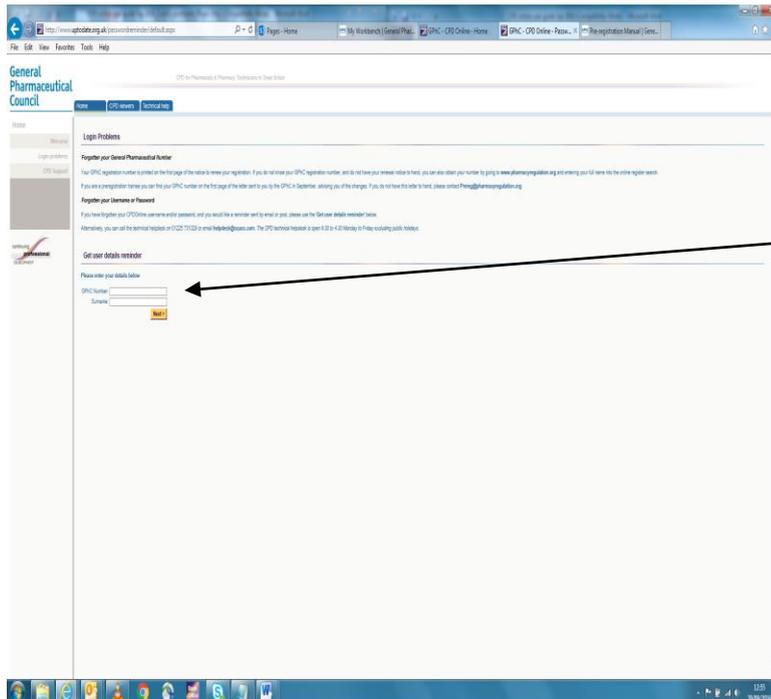
How can I get a reminder of my user details for CPDOnline?

If you need a reminder of your username and password for recording CPDOnline, please go to www.uptodate.org.uk and click on the "Login Problems" button on the left hand side of the page. Scroll to the bottom of the page, add your GPhC number and surname (see screenshots on next page) and click on the "Next" button.

Once you have submitted your GPhC number and surname, you will then be asked to provide your date of birth and postcode. Scroll back down to the bottom of the page to view a message about how your user detail reminder will be sent to you. If you have registered your email address with the GPhC, your user details will be emailed to you automatically. If you do not have an e-mail address registered with the GPhC or you are unable to provide the correct date of birth and/or postcode, then your user details will be posted to you (please note that this may take up to 7 days).



Locate the "Login Problems" link

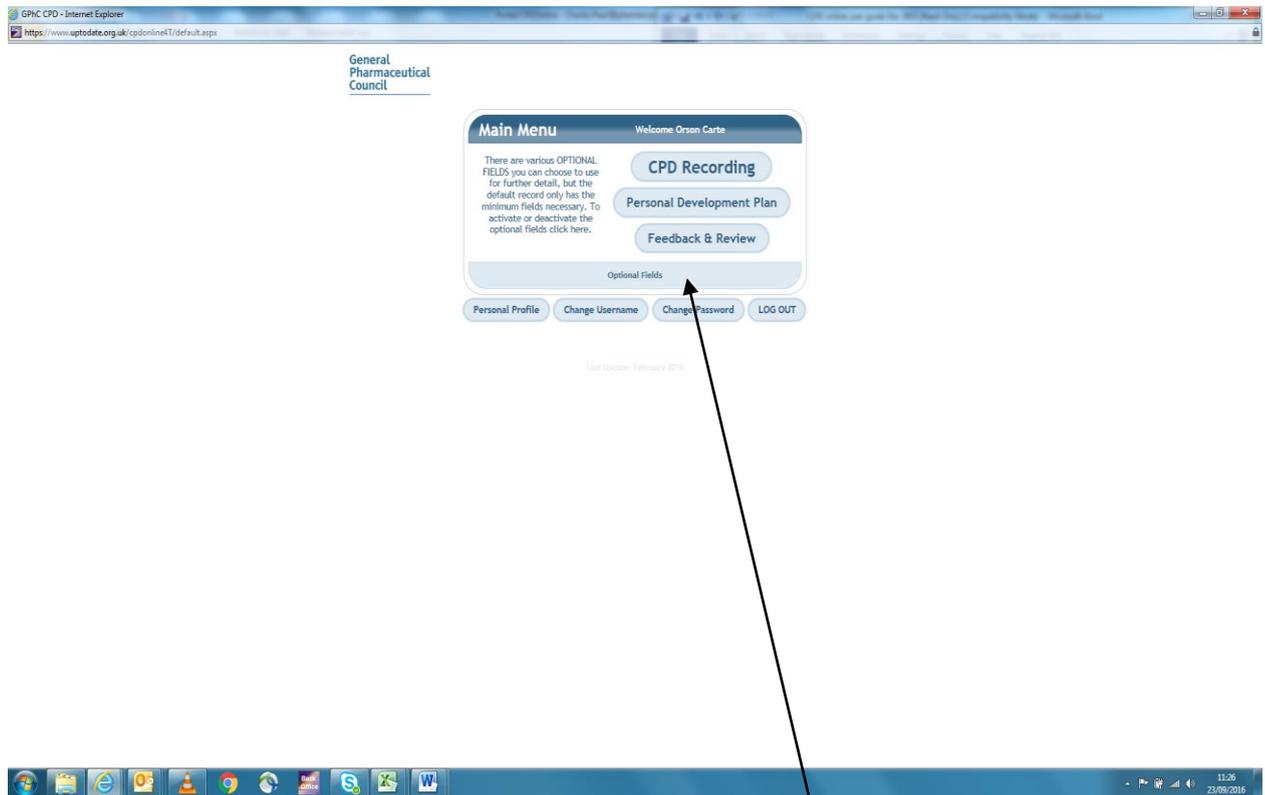


Type in your registration number and surname here

Preregistration trainee pharmacists who have a pre-reg account will be able to use the password reminder function in the same way – if you cannot remember your user details, or if you have a pre-reg number but no account and require an account to be set up, you will need to contact the CPDOnline technical helpline on **01225 428967** or by e-mailing helpdesk@coacs.com.

3. Using the software: the Menu page

The menu page provides a list of functions:



Optional fields tab

CPD recording: Use this section to make, edit and print entries in your CPD record.

Personal development plan: This section is optional but it can help you to plan your CPD around your current role and to help you to prepare for changes in your current role, to plan for new roles and to meet your longer term career plans. You can transfer information you have recorded in this section to your CPD record with a click of a button.

Feedback and Review: This function allows you to access the entries that you have submitted to the GPhC for review. It also allows you to view the feedback you receive. This feedback is more detailed than the feedback you will receive in the post.

Optional fields tab: You can use this tab to turn on (or off) additional fields such as competency frameworks relating to your sector of practice. We recommend that if you are a new user you leave these fields turned off as they are optional and do not form part of the GPhC's CPD review process.

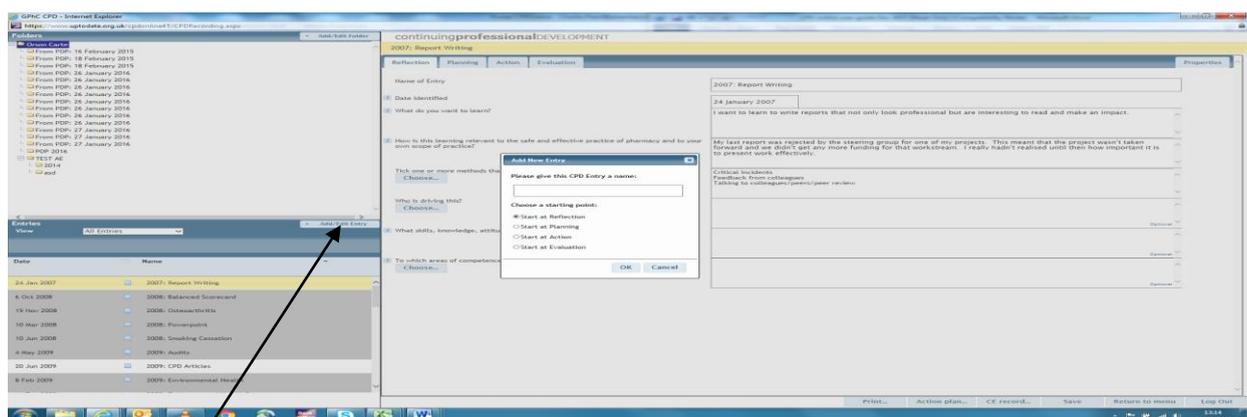
Personal profile: Use this function to tailor your CPD record to your own areas of practice and make it work in a way that suits your own needs. You can record using the tick boxes which sectors of practice you work in and some of the roles that you undertake.

Change username and change password: Use these buttons to change your user details.

Log out: Use this button to log out when you have finished a CPD session.

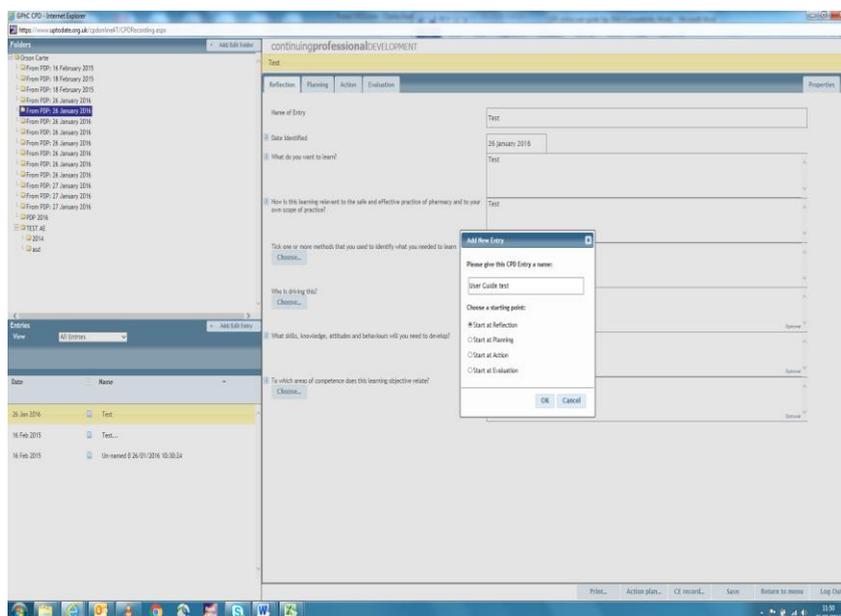
4. Making your first CPD entry

1. On the menu page click the "CPD recording" button.
2. Part way down the left hand side of the page, click the "Add/Edit Entry" button that appears next to "Entries". A list of options will appear: "New Entry", "Move Entry", "Delete Entry", or "Select All" – in this instance, select "New Entry".
3. You will be presented with a box like the one below asking you to give your CPD entry a name.



New entry button

4. Give your entry a name that you can easily associate with the nature of the CPD that you are recording. Remember that each CPD entry will need to have a different name, so if you are planning to record a number of CPD entries covering the same broad subject area think about how you will differentiate between the different entries. As an example, if you had a particular interest in diabetes, you may find that over time you undertake various CPD activities covering different aspects of the condition and its treatment. You will need to label each of your CPD entries differently - so you could choose Diabetes 1 and Diabetes 2 etc., label by date e.g. Diabetes 7.10, Diabetes 4.11, etc., or you may choose a label that identifies specifically which area of the condition your CPD entries is about, e.g. Diabetes Management, Diabetes Physiology, Medication for Diabetes, etc.
5. Indicate where in the CPD cycle of Reflection, Planning, Action or Evaluation you are starting your entry. Experience has shown that most people find it easiest to start their CPD entries at either reflection or action and we recommend this approach. As of July 2011, to meet the requirements of the GPhC's CPD framework, at least 3 out of 9 required entries for each full year of your registration **must** start at reflection.



Once you have given your entry a name and indicated where in the CPD cycle you are going to start your entry, click “OK”.

Learning that starts at reflection

For learning that starts at reflection you will be presented with a window like this:

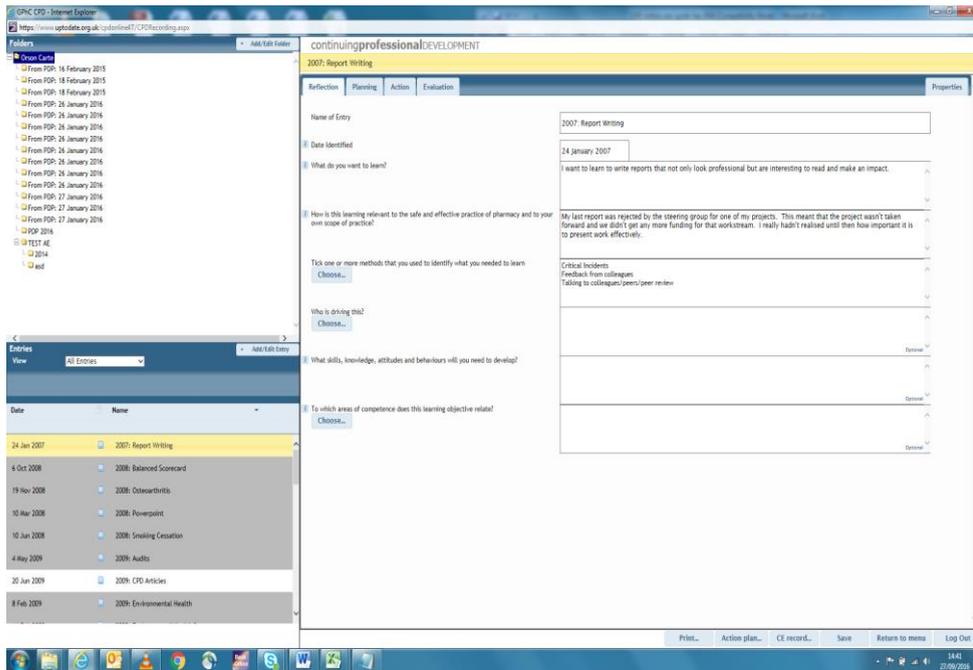
Tabs for navigating through stages of the CPD submission cycle

Columns listing date and name of CPD entry

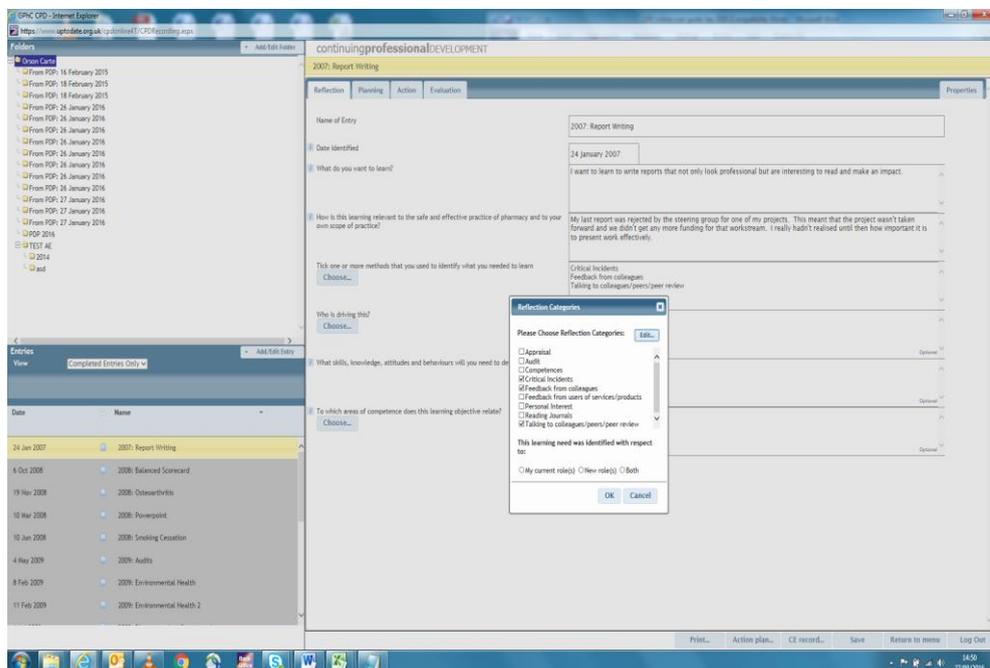
On the left hand side of the page you will see a column listing the name that you have given your CPD entry. Towards the top of the page you will see five tabs, one relating to each stage of the CPD cycle and one called “Properties”.

You now need to start adding information to the CPD entry that you have just created. To do this, make sure that the “Reflection” tab is selected. Some of the questions will require you to write a sentence or two. Others require you to make selections from lists or menus.

Some of the questions have an information icon next to them: . If you need assistance in answering the question, clicking on the icon  will open a window containing some further guidance. Once you become familiar with CPD recording, you will find that you need to use these icons less and less.

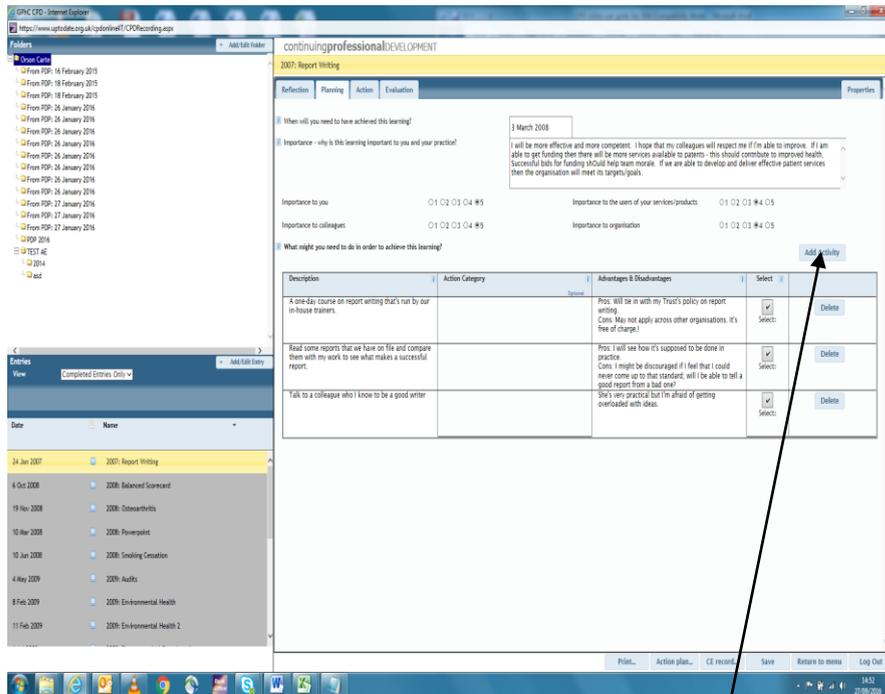


In the Reflection section, you can edit the list of methods that you have used to identify what you needed to learn. You might want to use this function if you want to map your learning, for example, to your current job description or roles, or those you may be working towards as a career plan.



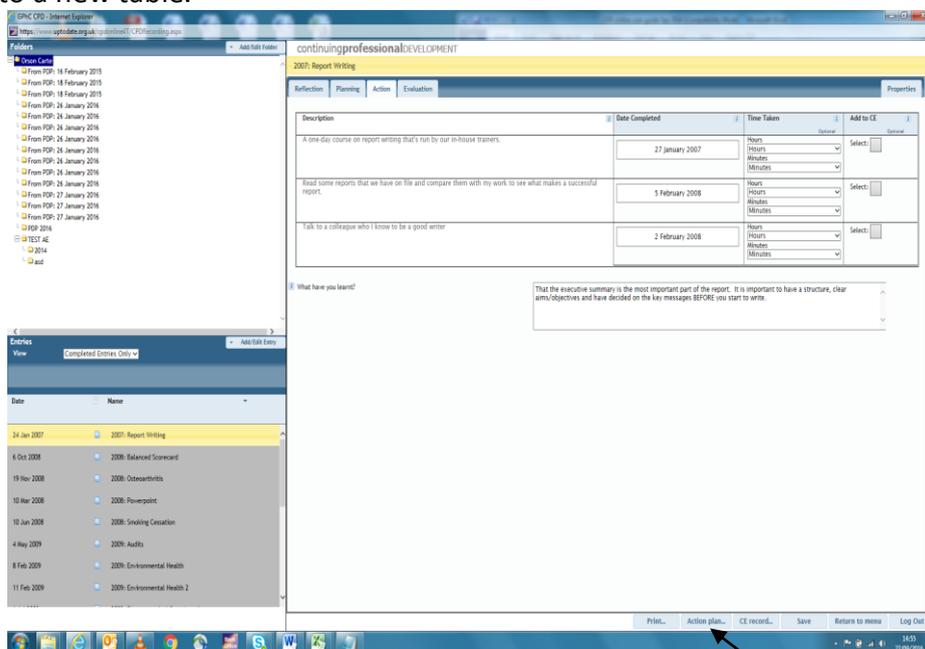
When you have finished answering the questions in the Reflection section, you can move on to the Planning, Action and Evaluation sections.

In the Planning section you will be able to create a list of different actions to achieve the learning you have identified. Click “Add Activity” then enter an appropriate description. Then select the activity that you intend to undertake by putting a tick in the box against the relevant activity.



Adding an Activity

When you progress to the Action section, the action(s) that you have selected will be carried forward into a new table.



Action plan options

Enter the date the activities were completed and in the box at the bottom of the page a brief description of what you have learnt. Once you have completed the evaluation section and are satisfied that your CPD entry is complete you may mark the entry as complete by ticking the appropriate box at the bottom of the “Evaluation” section.

Marking a CPD entry as complete

When you mark a CPD entry as complete the entry, as listed on the left hand side of your CPD record will be listed in grey so that you can easily distinguish it from those that are still active.

5. Saving, deleting and organising your CPD entries

Saving and deleting entries

Your CPD record is automatically saved every minute, and each time you move between the tabs in your CPD record. Additionally you can save your CPD record at any time by clicking the “Save” button in the bottom right corner.

To delete a CPD entry, select it from your list of CPD entries and click the “Add/Edit” button, then select “Delete Entry”.

Always log out by clicking the “Log out” button which appears at the bottom right hand side of each page. **If you close your record without logging out in this way you may lose some of the data you have just entered.**

Organising your entries

You can choose how you see your CPD entries by setting ‘preferences’:

- You can also change the “View” (the box under the word “Entries” on the left hand side of the page). You have a choice of viewing all entries, active entries only or completed entries only.
- You can organise your CPD entries into folders, for example around different subject areas or timescales. The folders appear in the top left of the screen. To create a new folder click on the location under which you would like the folder to be created, then click on the “Add/Edit Folder” button at the top left of the page next to the word “Folders”, and then select “New Folder”. You will then be prompted to enter a name for the new folder. When you have done this click “OK”.
- You can move entries into folders by selecting the entry you wish to move, clicking on the “Add/Edit Entry” button, and selecting “Move Entry”. You can then select the folder that you want to move the entry to. You can also delete or rename folders and/or entries, by clicking on to the “Add/Edit Folder” or “Add/Edit Entry” to access the relevant option you wish to carry out. You can only delete folders that do not contain any CPD entries.

6. Properties

By clicking on this tab you can

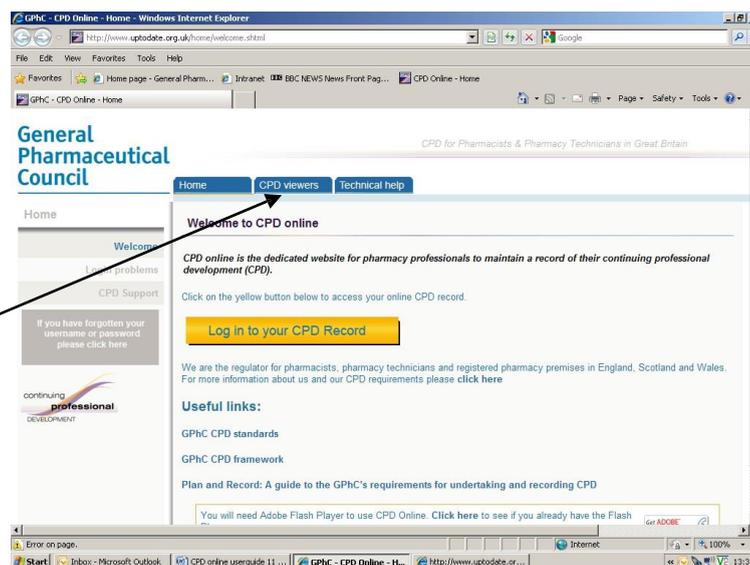
- See when your CPD entry was created and last modified.
- Mark whether or not the entry should be included in a submission to the GPhC the next time your CPD record is called for review.
- Give access to some or all of the entries in your record to people chosen by you.

Viewer function

This function is useful if you want, for example, to let CPD facilitators view certain entries in your CPD record or if you want to demonstrate to an employer or a commissioner that you have been undertaking CPD in a particular area. You can select whether you want each viewer always to have access or you can restrict access to between certain dates.

You need to set up a separate username and password for each viewer. For security reasons make sure the usernames and passwords that you set up are different to your own. After you have provided the details of each new viewer click "OK". You can add or delete viewers or change each viewer's access and/or user details at any time.

Once you have set up a particular viewer's access they can visit the website and log in as an authorised viewer using the username and password you have given them. NB. Your authorised viewer will require your GPhC number in order to login to the Viewers site.



Viewers cannot edit your CPD record and they can only view the parts of it you have selected for them to see.

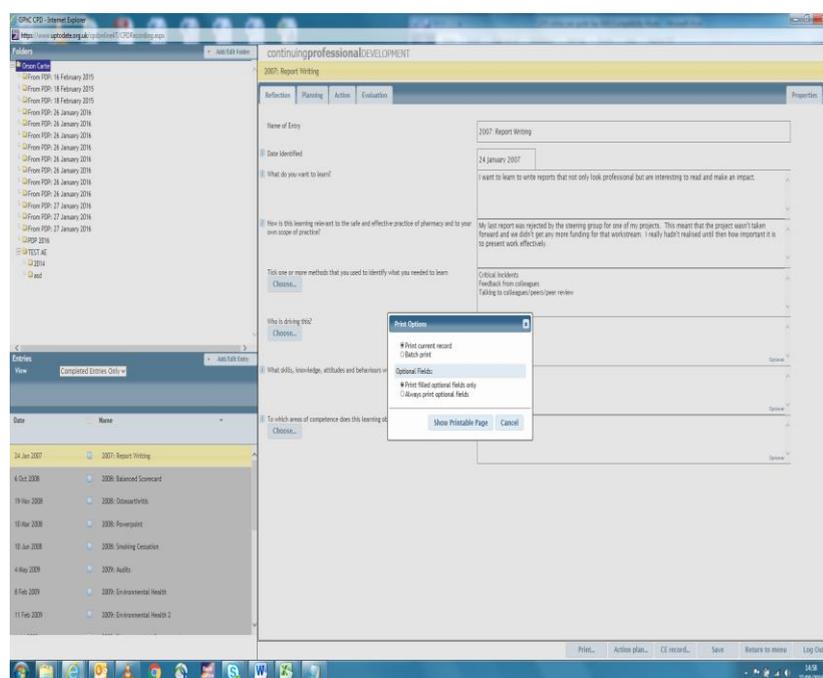
You can test this function once you have completed a few CPD entries. Add yourself to the list of viewers with a different username and password, set the access to 'always on' for a period that covers the present time. Then select one or two of your CPD entries for viewing. Log out of your CPD record and return to the CPD website at www.uptodate.org.uk. Select the option to log in as an authorised viewer using the username and password you have given yourself. You should now be able to see the entries you have selected.

GPhC access, confidentiality and submitting your record for review

The GPhC does not have access to your CPD record and will not want to access it until it asks you to submit a record for review. The record remains confidential to you and you can decide who sees what. Even if, within the "Properties" tab, you have indicated that you wish the entry to be included in your submission to the GPhC, the GPhC cannot see it until you have had your record called for review and you have submitted it to the GPhC. The default setting here is for a tick to be placed in this box, but you may remove it if you wish.

7. Printing your CPD entries

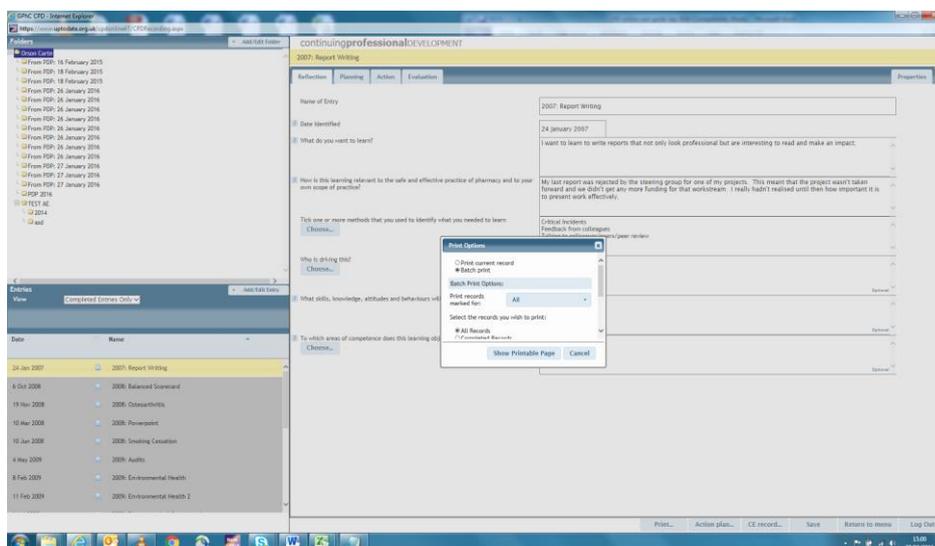
You can print your CPD entries by clicking the "Print" button at the bottom of the CPD record screen. You will see the window shown below.



If you have turned on the optional fields you can choose whether you always want these fields to show in the printed record, or only when you have used them.

Clicking on the "Show printable page" button at the bottom of the page will allow you to view the complete CPD entry as it will appear when you print it. To print, click on the printer icon towards the top of the page.

If you want to print a set of entries, for example those that have been marked for future submission to the GPhC, or only complete or active CPD entries select the “Batch Print” tab. Then select the entries you would like to print and the dates for the period to be covered.



8. Submitting your CPD record to the GPhC for review

When the GPhC writes to you to ask you to submit your CPD record for review, a notice will appear on the main menu, and a “Submit record” button will automatically appear at the bottom of the CPD record screen. You will not see this button until your CPD record has been selected for review. By clicking this button you should see a window listing of all the entries that are marked for inclusion within a submission to the GPhC. Using the tick boxes you should then be able to select the entries you wish to submit. Make sure that you don’t click the “Submit” button in this window until you have checked that you have selected all of the entries you want to submit. Once you have made your submission, the “Submit” button will disappear from view, and you will be unable to submit any more entries, but you will be able to track the progress of your submission using the “Review and Feedback” tab on the main menu. Please note that if, after pressing the final “Submit” button, you discover that your submission is incomplete please contact the GPhC *as soon as possible* by telephone on **0203 713 8000**. It is sometimes possible for the GPhC to undo the submission, but only if your record has not already been reviewed.

Further instructions on how to submit your CPD record for review will be provided once you have been selected for CPD record review.

We hope you have found this user guide helpful. Having read the guide, if you do still have any technical queries please contact the technical helpline:

Tel: 01225 428967 (Mon – Fri, 9.30am – 4.30pm)
e-mail: helpdesk@coacs.com

