




CPD
CPD Management System

USER MANUAL

Provider Workspace

Version 2.0

<p>Prepared by:</p>  <p>SYNERGY INFORMATICS <i>informing medical decisions</i></p>	<p>April 2023</p>
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2 Definition Of Terms

The Council Refers to 'The Kenya Medical Practitioners and Dentists Council'.

Continuing professional development (CPD) is training that leads to broadening of knowledge and skills and enhancement of personal qualities related to continuous improvement in the performance of professional duties.

CPD provider Refers to an institution, entity or organization that facilitates delivery of CPD activities and is accredited by the Council.

Practitioner Refers to a person who is professionally engaged in medicine and dentistry practice and is registered by the Council.

CPD calendar year This is the specified period by which CPD activities are implemented. The period in this case runs from 1st January to 31st December of every year.

Presenter A person who makes a presentation, lecture or talk at a CPD forum lasting at least 30 minutes.

Facilitator This is a person who brings about an outcome by providing assistance,

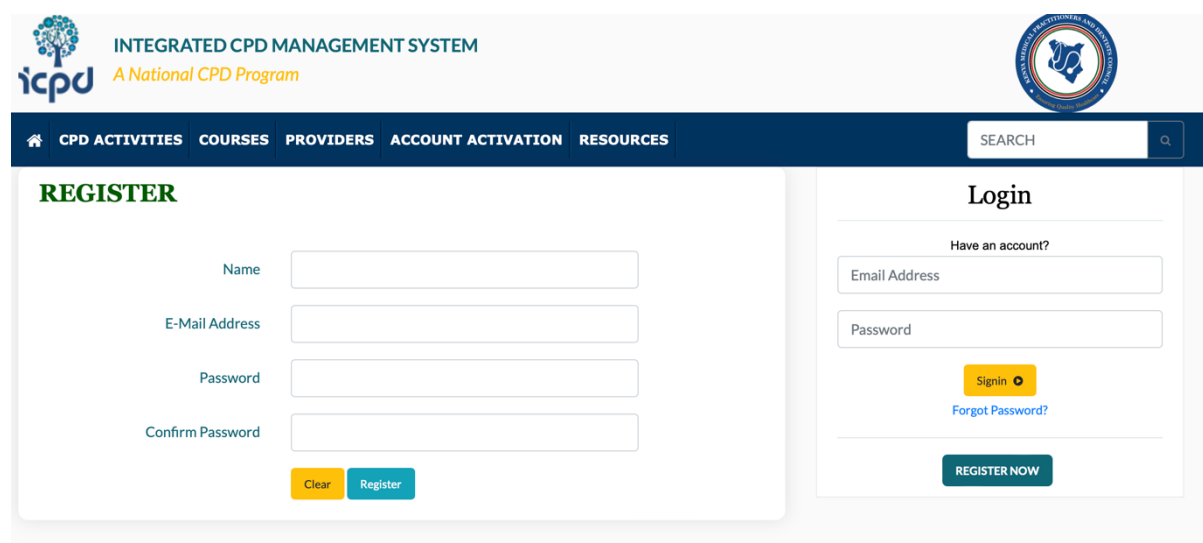
3 Registration as a Provider

Follow the instructions as described on the CPD Guidelines (2022) section 13.3 *Registration Process for CPD Providers and Accreditation and Retention of CPD Providers on page 19.*

3.1 Registration as a provider Coordinator.

Once the Provider has been accredited the CPD Coordinator is assigned the provider's workspace managed roles on the iCPD portal by the Council's CPD Officer. The following steps are followed.

The coordinator creates a user account on the portal by clicking on <https://cpd.icpdkenya.org/register>



The screenshot displays the iCPD portal interface. At the top left is the iCPD logo and the text "INTEGRATED CPD MANAGEMENT SYSTEM A National CPD Program". At the top right is the Kenya Dental Council logo. Below the header is a navigation menu with links for "CPD ACTIVITIES", "COURSES", "PROVIDERS", "ACCOUNT ACTIVATION", and "RESOURCES". A search bar is located on the right side of the navigation menu. The main content area is split into two columns. The left column is titled "REGISTER" and contains four input fields: "Name", "E-Mail Address", "Password", and "Confirm Password". Below these fields are "Clear" and "Register" buttons. The right column is titled "Login" and contains a "Have an account?" section with "Email Address" and "Password" input fields, a "Signin" button, and a "Forgot Password?" link. Below the login section is a "REGISTER NOW" button.

Basic Steps:

1. Register as a new user on the portal
2. A confirmation email will be sent
3. Click verify on the confirmation email

Additional Steps if the coordinator is either a Dentist or Practitioner.

4. Click on the "My Profile" Menu
5. Import form will be loaded.
6. Provide the incomplete information and click **import**
7. A confirmation email will be sent to you.

4 Landing Page

The screenshot shows the homepage of the Integrated CPD Management System. At the top, there is a navigation bar with contact information (+254727666444, cpd@kmpdc.or.ke) and links for Home, Developer, About Us, Contact Us, and Help & Support. A 'MIGRATE' button is highlighted in red, along with 'LOGIN' and 'REGISTER NOW' buttons. The main header features the ICPD logo and the text 'INTEGRATED CPD MANAGEMENT SYSTEM - A National CPD Program'. Below this is a dark blue navigation bar with links for CPD ACTIVITIES, COURSES, PROVIDERS, ACCOUNT ACTIVATION, and RESOURCES, alongside a search bar. The main content area is divided into several sections: 'Search CPD Activities' with a search box and 'VIEW ACTIVITIES'/'CREATE ALERT' buttons; 'Featured CPD Activities' listing events like 'Annual CFA Conference 2024 Test Event' and 'MYELOMA BONE DISEASE'; 'Speakers' and 'Resources' sections; and a 'Login' section with fields for Email Address and Password, a 'Signin' button, and a 'REGISTER NOW' button. There are also 'Keep Informed' and 'Connect With Us' sections with social media icons.

4.1 Login

After successful registration, you are ready to login and manage your profile.

This screenshot shows the login and registration page of the ICPD system. The layout is similar to the landing page but with a focus on the user authentication forms. The 'Login' form on the left has three numbered callouts: 1 points to the 'Have an account?' checkbox, 2 points to the 'Signin' button, and 3 points to the 'Forgot Password?' link. The 'Create Account' form on the right has a '2' callout pointing to the 'Register' button. The footer contains the ICPD logo, contact information, and a copyright notice: 'All material on this website is protected by copyright, ICPD Copyright © 2023 by Synergy Informatics Ltd. This Website also contains material copyrighted by 3rd parties.'

1. Key in the email address you used during registration

2. Key in the password you entered during registration
3. Click on the login button to login.

4.2 Home Page

Upon successful login, you will be re-directed to the below home page.

The screenshot displays the ICPD Home Page. At the top, there is a header with contact information (+254727666444, cpd@kmpdc.or.ke) and navigation links (Home, Developer, About Us, Contact Us, Help & Support). A user profile for James Njuguna is shown with a 'Log Out' button and a 'Claim Points' button. The main navigation bar includes 'CPD ACTIVITIES', 'COURSES', 'PROVIDERS', 'MY PROFILE', 'MY PORTFOLIO', and 'RESOURCES'. A search bar is located on the right. The main content area is divided into several sections: 'Search CPD Activities' with a search input and 'VIEW ACTIVITIES'/'CREATE ALERT' buttons; 'Featured CPD Activities' listing events like 'Annual CFA Conference 2024 Test Event', 'MYELOMA BONE DISEASE', 'SPEAKERS', 'PRESENTER POINTS', 'MANAGEMENT OF CHARCOT ANKLE JOINT', and 'TOTAL KNEE REPLACEMENT'; 'Resources' with links to 'The Disease Management Project', 'Downloads', and 'Guidelines'; 'Toggle Workspaces' with a 'Provider Workspace' button (circled in orange with a '2'); 'Keep Informed' with a 'SUBSCRIBE' button; and 'Connect With Us' with social media icons. Advertisements for ICPD are also present, featuring the slogan 'Quality Patient Care does not just happen!'.

2. Click on **Workspaces** **Provider Workspace** to go to the Provider's Dashboard.

4.3 Dashboard

The screenshot shows the 'Provider Dashboard' for James Njuguna, a Practitioner Provider Coordinator. The dashboard includes a navigation menu on the left with options like Home, CPD Activities, Profile, Moderators, and Subscribers. The main content area has three shortcut buttons: 'EDIT PROFILE' (View/Update Profile), 'ACTIVITY' (Create New Activity), and 'TOGGLE WORKSPACE' (Practitioner's Workspace). Below these are two bar charts: 'CPD Activities' showing a peak in 2020 and 'CPD Claims' showing a peak in 2020. A total of 64 activities and 2049 claims are registered.

Year	CPD Activities
2019	20
2020	35
2021	10
2022	2

Year	CPD Claims
2019	400
2020	1100
2021	500
2022	10
2023	10

1. Click to view Users' profile and to switch Workspaces
2. Menu Navigation
3. Click Edit Profile to Update the Provider's profile
4. Click ACTIVITIES to view list of activities, Create new activities
5. Toggle back to Practitioner's workspace (If you are a registered practitioner)

4.4 Profile

The screenshot shows the 'CPD Provider Details' page for the Kenya Medical Association. The page has a navigation menu on the left and a main content area with a form for provider information. The form is divided into two tabs: 'Provider Details' and 'User Roles'. The 'Provider Details' tab is active, showing a form with fields for Provider Name, Registration Number, Email, Phone, Physical Address, Postal Address, Postal Code, City, Website, and Specializations.

Field	Value
Provider Name	Kenya Medical Association
Registration Number	
Email	
Phone	
Physical Address	
Postal Address	
Postal Code	
City	
Website	
Specializations	

4.5 CPD Activities

PROVIDER'S PORTAL Try searching ...

James Njuguna
Practitioner Provider Coordinator

Navigation

- Home
- CPD Activities
 - Activity List
 - Create
 - Archived
 - Tokens
- Profile
- Moderators
- Subscribers

CPD Activities List

Activity List

Copy CSV Excel PDF Print

2 Add New Activity

#	Activity Title	Activity Type	Status	End Date	Actions
20914	Activity Test Creation	Conferences	Published	03-12-2022	👁️ 🗑️
20117	Efficacy and inferiority between Leveteceram and Valproate in seizure control by Dr. Supa Tunje	Journal clubs	Published	11-08-2021	👁️ 🗑️
20105	CYBERKNIFE FUNCTIONALITY AND ITS VARIOUS APPLICATIONS	Lectures	Published	11-08-2021	👁️ 🗑️
19609	Metastatic Bone Disease by Dr. Riaz Kasmani	Lectures	Published	08-06-2021	👁️ 🗑️
19192	A). De-tangling Asthma Misconceptions- Spotlight on Patient Management. b). Role of ICS in the COVID era.	Lectures	Published	28-05-2021	👁️ 🗑️
19065	Breast cancer - Advances in Management. Role of surgery and multimodality treatment of advanced oligometastatic cancer of the prostate	Lectures	Published	20-05-2021	👁️ 🗑️
18822	Treatment Strategies & ideal time for intervention in Covid 19 patients .	Lectures	Published	16-04-2021	👁️ 🗑️
18381	*Curing Blood Cancers	Lectures	Published	23-03-2021	👁️ 🗑️
18052	ONCOLOGY SYMPOSIA Webinar	Lectures	Published	19-02-2021	👁️ 🗑️
18051	Updates on Management of Upper Respiratory Tract Infections	Lectures	Published	25-02-2021	👁️ 🗑️

Showing 1 to 10 of 64 entries

Previous 1 2 3 4 5 6 7 Next

1. Activity List: All existing CPD activities both published and unpublished
 - 1.1. Activity title: Name/Title of the CPD Activity
 - 1.2. Activity Type: either Conference, Lecture e.t.c.
 - 1.3. Activity Status: Either Published or Not
 - 1.4. End Date: When the activity is expected to end.
 - 1.5. Edit/View/Delete existing Activity
2. Click on Create Activity to add a new activity

Add New Activity

4.5.1 Create New Activity

4.5.1.1 Activity Details

The screenshot shows the 'New Activity' form in the PROVIDER'S PORTAL. The form is titled 'New Activity' and has tabs for 'Activity Details', 'Description and Objectives', 'Moderators', 'Presenters', 'Tokens', and 'Preview'. The 'Activity Details' tab is active. The form contains several fields: 'Activity type' (dropdown, #1), 'Activity title' (text input, #2), 'Delivery Mode' (dropdown, #3), 'Sessions(No of days)' (dropdown, #4), 'Target Specialities' (text input, #5), 'Venue(Full description)' (text area, #6), 'City/Town' (text input, #7), 'Start End Date' (date pickers, #8 and #9), and 'Save and Proceed' (button, #10) and 'Discard' (button). The user 'James Njuguna' is logged in as 'Practitioner Provider Coordinator'.

Activity Details

1. Select Activity Type
2. Provide Activity title "Activity Name"
3. Select Delivery Mode; If "Online" or "Hybrid" #7 will be required for Online Meeting Details otherwise if "Online" only #8 will not be applicable and if "Physical" #7 will not be applicable
4. Provide Session numbers (Number of days/sessions per activity)
5. Select Target Specialties
6. Provide Online meeting details (if delivery mode is "Online" or "Hybrid")
OR Provide Venue description (if delivery mode is "Physical" or "Hybrid")
7. Select the Town the activity will be held (if delivery mode is "Physical" or "Hybrid")
8. Select the Start Date of the activity
9. Choose the End Date of the activity.
10. Click "Save and Proceed"

4.5.1.2 Description And Objectives

CPD Activities Create New Description Home / CPD Activities / New

New Activity

Activity Details | **Description and Objectives** | Moderators | Presenters | Tokens | Preview

Activity description * 1

I have been experimenting with Collect and Aggregate to enable data collection on our team's smartphones. We have standard forms and checklists that are re-used for various projects over multiple years. One shortcoming I see is that whenever a form is updated, all of the data is submitted into a new database. So far the only solution I can see would be to download the old database as CSV, and maintain a merged version outside of Aggregate. Would appreciate any advise or tips you can offer.

Activity Objectives * 2

I have been experimenting with Collect and Aggregate to enable data collection on our team's smartphones. We have standard forms and checklists that are re-used for various projects over multiple years. One shortcoming I see is that whenever a form is updated, all of the data is submitted into a new database. So far the only solution I can see would be to download the old database as CSV, and maintain a merged version outside of Aggregate. Would appreciate any advise or tips you can offer.

Save and Proceed Discard

1. Provide the "Activity description"
2. Provide the "Activity Objectives"
3. Click "Save and Proceed"

4.5.1.3 Moderators

New Activity

Activity Details | Description and Objectives | **Moderators** 8 | Presenters | Tokens | Preview

Registration No.

Registration No 1

Title * 2

Select 4

Middle Name 6

Portfolio * 7

First Name * 3

First Name 5

Last Name * 5

Last Name

Save and Proceed Discard

New Activity

Activity Details

Description and Objectives

Moderators

Presenters

Tokens

Preview

Registration No.

Title *

First Name *

Middle Name

Last Name *

Topic *

Portfolio

Affiliation

Save and Proceed

Discard

Activity Moderators

1. If the Moderators is a registered agent "Provide Agent No"
2. Select the "Title"
3. Add "First name"
4. Add "Middle Name"
5. Add "Last name"
6. Add "Portfolio details"
7. Save and Proceed
8. List of Moderators

4.5.1.4 Presenters

New Activity

Activity Details Description and Objectives Moderators **Presenters** Tokens Preview

Registration No.
Registration No.

Title * First Name *

Middle Name Last Name *

Topic *

Portfolio

Affiliation

Activity Presenters

1. If the Presenters is a registered agent "Provide Agent No"
2. Select the "Title"
3. Add "Presenter's name"
4. Add "Topic" the presenters
5. Add "Portfolio details"
6. Add Presenter's "Affiliation"
7. Save and Proceed
8. List of Moderators



4.5.1.5 Tokens

CPD Activities Create Presenters Home / CPD Activities / New

New Activity

Activity Details | Description and Objectives | Moderators | Presenters | **Tokens** | Preview

Session *
- Choose Session - 1

Select a session.

Number 2

Number of tokens for all people to attend.

Validity Period

Valid from date 3 Valid to date 4

Save and Proceed Discard 5

Token Summary

32 Unclaimed Tokens 6

38 Total Tokens

Token Create

1. Choose Session
2. Provide number of tokens for each
3. Token Validity date from
4. Token Validity date to
5. Save and Proceed
6. Number of Tokens (Unclaimed and Total)

4.5.1.6 Preview

CPD Activities Details Home / CPD Activities / Details

Activity Test Creation

2022-03-01 00:00:00

Starting on: 2022-03-01 00:00:00

Ending on: 2022-12-03 00:00:00

Moderator: 1. Maizemil JABBAL
For any further enquiry, please reach us on: cpd@icpdkenya.org and copy to cpd@kmpdc.go.ke For any further enquiry, please reach us on: cpd@icpdkenya.org and copy to cpd@kmpdc.go.ke

Venue: TESt

Max Credits: 15

Presenters

1. Test Mayce
hghasflngisan
ufdaglnh

Description
Description

Objectives
Objectives

Summary

Type: Conferences

Statistics

9 Total Tokens

0 Claimed Tokens

0 Unclaimed Tokens

0 Views/Clicks

Publish

Edit

Discard

Click Preview.

Activity Preview Actions

Un-published

Published

1. Click **Publish** to publish activity. By default, the Activity is un-published, and any tokens cannot be claimed
2. Click **Edit** to go back and edit the activity.
3. Click **Un-Publish** to Unpublish the activities.
4. Click **Attendees List** to view the attendees (who have claimed points) or add list of attendees to award points. Ref; 4.5.1.11

4.5.1.7 Tokens List

CPD Activities Preview Tokens Home / CPD Activity / Preview Tokens

Test Activity

Show 10 entries

Search:

Token.#	Batch#	Session#	Valid From	Expiry Date	Status	Action	
1	3856447	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
2	3279302	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
3	3715260	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
4	3493091	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
5	3903132	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
6	3980897	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
7	3134793	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
8	3797500	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
9	3748605	3092262	1	2021-06-17	2021-07-01	open	✔ ✖
10	3030578	3092262	1	2021-06-17	2021-07-01	open	✔ ✖

Showing 1 to 10 of 10 entries

Previous 1 Next

Back to activity
Download All

Summary

Total Tokens	Unclaimed
10	10

Sessions Actions

Session *

- Choose Session -

Download
Edit
Delete

Batches Actions

Batch *

- Choose Batches -

Download
Edit
Delete

4.5.1.8 Edit Token

CPD Activities Edit Tokens Home / CPD Activities / New

Edit Tokens

Token
3279302

Session Number
1

Batch
3092262

Validity Period
Valid from date: 2021-06-17 Valid to date: 2021-11-18

Save and Proceed Save Exit

Tokens can be edited by changing the validity period (Dates) Other details cannot be changed.

4.5.1.9 Token Batch Operations

Batches Actions

Batch +
- Choose Batches -

Download Edit Delete

Download

Edit Token Batch

- Select the Batch you want to edit
- Click Edit Edit
- Click Confirm on the pop-up message to confirm the action

Confirm!

Are you sure you want to edit this token batch?

CONFIRM CANCEL

Delete Batch

- Select the Batch you want to delete
- Click Delete Delete
- Click Confirm on the pop-up message to confirm the action

Confirm!


Are you sure you want to delete this token batch?

CONFIRM CANCEL

4.5.1.10 Token Session Operation



Edit Session's Token

- Select the Session you want to edit
- Click Edit 
- Click Confirm on the pop-up message to confirm the action




Confirm!

Are you sure you want to edit this token session?

CONFIRM CANCEL

Delete Batch

- Select the Batch you want to delete
- Click Delete 
- Click Confirm on the pop-up message to confirm the action



Confirm!

Are you sure you want to delete this token session?

CONFIRM CANCEL

4.5.1.11 Activity Attendees

The screenshot shows the 'Activity Attendees' interface. At the top, there's a header 'Activity Attendees List' and a breadcrumb 'Home / Activity / Attendees'. Below that is a dark bar with 'ACTIVITY DETAILS: Activity Test Creation'. A table shows details: Starting on: 2022-03-01 00:00:00, Ending on: 2022-12-03 00:00:00, Venue: TEst, Max Credits: 15. Below this is a dark bar with 'Activity Attendees [44]', 'Upload New Attendees' (circled 1), and 'Uploaded Attendees' (circled 2). A search bar and 'Show 10 entries' are present. A table lists attendees with columns: Reg No., Name, Email, Claim Method, Points, and Action. The table contains 10 rows of data. At the bottom, it says 'Showing 1 to 10 of 43 entries (filtered from 44 total entries)' and has pagination buttons: Previous, 1, 2, 3, 4, 5, Next.

Reg No.	Name	Email	Claim Method	Points	Action
A2610	BARRY RAMADHANI	brayumba@yahoo.co.uk	attendance	5.00	
B177	BEN BARIDI	drbaridi@gmail.com	attendance	5.00	
A8004	CECILIA KIILU	ckkiilu@hotmail.com	attendance	5.00	
A4978	CHRISPINE OJUOR	drowuorchris@yahoo.com	attendance	5.00	
A11235	CLARA CHEMTAI	Claralaibuch@gmail.com	attendance	5.00	
A7702	DAISY CHEPKEMOI	KORIRDAISY@GMAIL.COM	attendance	5.00	
A11970	EDWIN KIPCHIRCHIR	edwinrono56@gmail.com	attendance	5.00	
A4368	ELIJAH NZEKI	enmuteti@gmail.com	attendance	5.00	
A4455	EMMANUEL OCHIENG	ligeyo2005@yahoo.com	attendance	5.00	
A4501	EVANS MWANGI	EMANUTHU@GMAIL.COM	attendance	5.00	

1. Click Upload New Attendees to load the form for uploading the list of attendees.
2. Click Uploaded Attendees to show all the attendees you have previously uploaded for this activity and the status.

Uploading Attendees.

The screenshot shows the 'Import Attendee List' form. It has a title bar with a close button. Below the title is a 'File' section with a 'Choose file' input and a 'Browse' button (circled 2). Underneath, it says 'Upload xlsx or xls'. A note says 'Use this table format' with a circled 1. Below the note is a table with columns: RegNo, Fullname, Email, and ActivitySession. The table contains one row: Axxxx, Dr. John Doe, john.doe@example.com, 1. Below the table, it says 'Ensure all column names are same as this sample.' At the bottom, there are 'Close' and 'Save' buttons (circled 3).

RegNo	Fullname	Email	ActivitySession
Axxxx	Dr. John Doe	john.doe@example.com	1

1. Prepare an Excel sheet with the list of attendees and Save As an .xlsx or .xls in the format provided here e.g.

RegNo	Fullname	Email	ActivitySession
A0000	Dr. John Doe	John.doe@example.com	2

Note:

- a. the column Titles must be in the same format as listed here.
 - b. The ActivitySession is the session number of the activity if it had multiple or 1 if it was single session
2. Click Browse to find the file in the computer and upload it for processing.
 3. Click save to process the file. The system will only process the file if it is correctly created and each row has corresponding value per column.

Processing and Awarding Points.

Imported Activity Attendees List

Home / Activity / Attendees

ACTIVITY DETAILS: Activity Test Creation

Starting on: 2022-03-01 00:00:00 Ending on: 2022-12-03 00:00:00

Venue: TEst Max Credits: 15

Imported Activity Attendees [7] Upload New Attendees Process All

Show 10 entries Search:

Reg No.	Name	Email	Session	Status	Comment	Date
A03545	Joseph Abuya	abuyajm@yahoo.com	1	failed	Not Found	2023-03-24 17:58:00
C0000166	Dr Parag Patil	parag.16@gmail.com	1	failed	Not Found	2023-03-24 17:58:00
A11494	Louise Lusimbo	louiselusimbo@gmail.com	1	failed	Not Found	2023-03-24 17:58:00
A9646	Nicholas Mukomi Mutogoh	n.mukomi@outlook.com	1	failed	Not Found	2023-03-24 17:58:00
A11492	Priscilla Madzo Munga	madzomunga@gmail.com	1	failed	Not Found	2023-03-24 17:58:00
A5073	DR KALYA	kalyasteve@yahoo.com	1	failed	Not Found	2023-03-24 17:58:00
A14819	Dr Cheruiyot Dismas	kipronodismas@gmail.com	1	failed	Not Found	2023-03-24 17:58:00
A30001	Isaya Opondo	opondo.isaiah@gmail.com	1	processed	Points awarded!	2023-03-17 12:17:00
A10934	Makokha Japheth	Motsyula@gmail.com	1	processed	Points awarded!	2023-03-17 12:17:00
A11970	Edwin Rono	edwinrono56@gmail.com	1	processed	Points awarded!	2023-03-17 12:17:00

Showing 1 to 10 of 49 entries Previous 1 2 3 4 5 Next

Once the list has been uploaded.

1. Click **Process All** to allocate points for each person. If the Attendee does not have an account on the ICPD portal or the details are incorrect the system will display it on the comment column otherwise the points will be awarded, and status set to **Processed**.
2. If an individual column is not processed for some reason click on the processing icon to reprocess or Trash icon to delete it.