# PROVIDER'S GUIDE: PROFESSIONAL DEVELOPMENT PORTAL

Quick Reference Guide

HOW TO ADD A NEW TRAINING SESSION?

- Log in to the Professional Development Portal.

- In the "Administration" section, click on "Training courses and events" to see the training courses for which you have administrator access rights. This is where the new training session will be displayed once created.

- Click on "New session" at the top right corner to add a new training session.
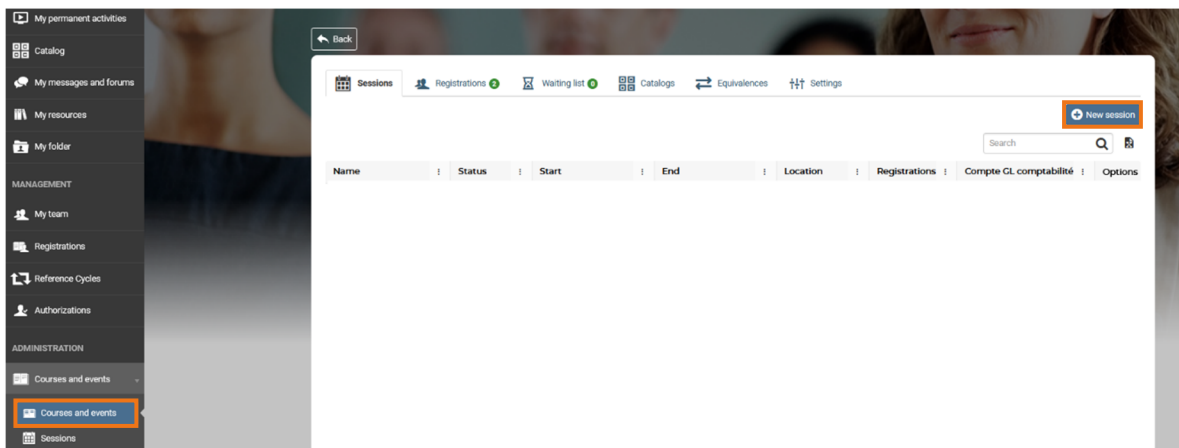
In the "General information" section, fill in all the fields. See the following section for an explanation of the fields to be completed.

EXPLANATION ON THE FIELDS TO BE COMPLETED

Under the "General information" tab:

A. Name of the session

Enter the name of the session, as it appears in the catalogue of training courses. Make sure you include the date and time of the training and how it will be delivered (e.g. self-study, webinar, classroom training, etc.).

Example of a session name: "Training name - date, time - (Self-study/Webinar/Classroom)."

B. Accounting GL account

Always select the "Provider – Accredited training" option.

C. "Duration" tab:

The duration of the session indicates the date and time of the training. Once the date has passed, the training session will no longer be displayed in the catalogue of training courses and registration will be closed.

IMPORTANT: you must indicate a start and end date for each training course created, otherwise it will remain available in the catalogue of training courses, even after it has been delivered.
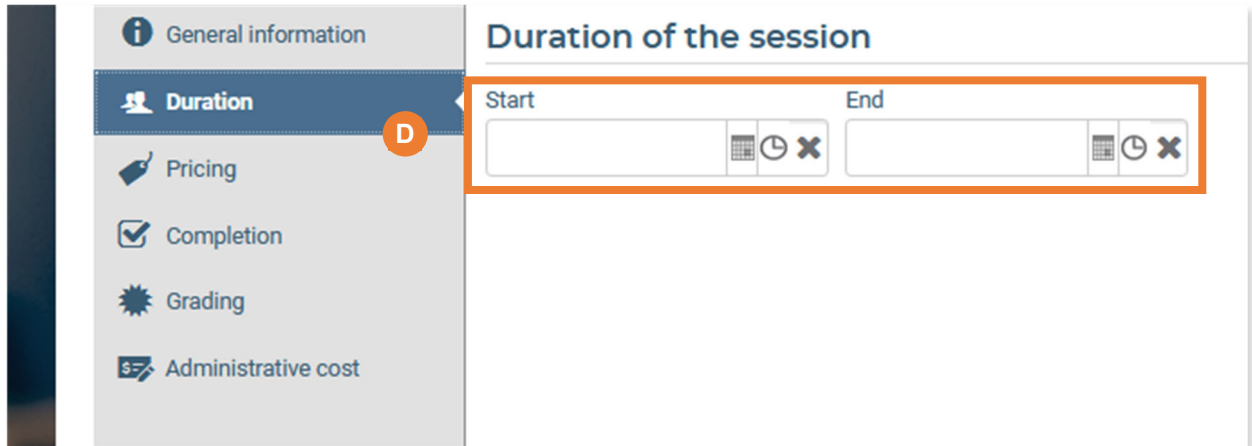
HOW TO MODIFY A TRAINING SESSION?

D. "Duration" tab:

Here is an example of the **administrator view** showing sessions where dates have been included in the "Duration" tab. These can be changed at any time by clicking on the small lines to the right of each session and selecting "Settings":
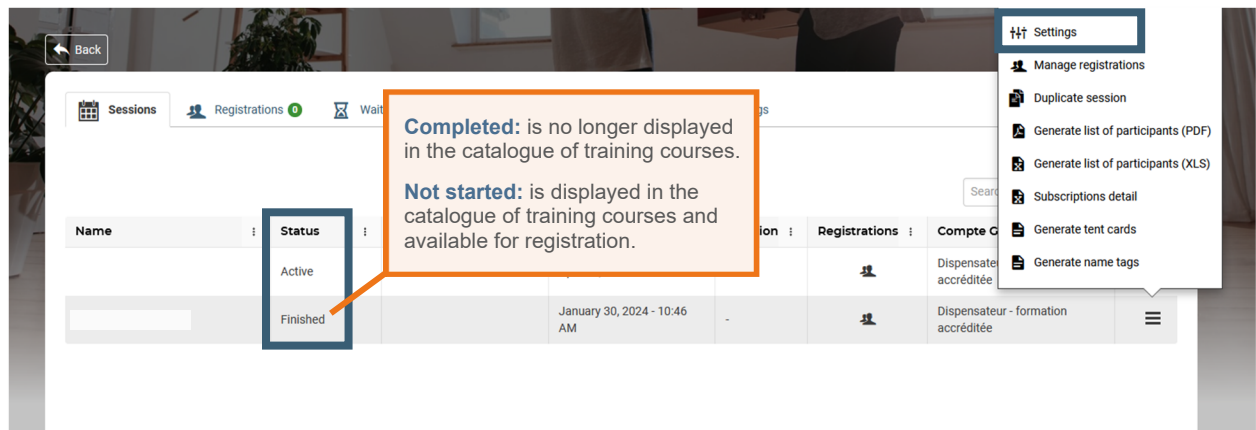
You must always enter the date and time of the training course in the "Duration" tab. Without the date and time, users of the Professional Development Portal will continue to see the training session as active even though it has already been delivered.

Here is an example of what is displayed when this happens:
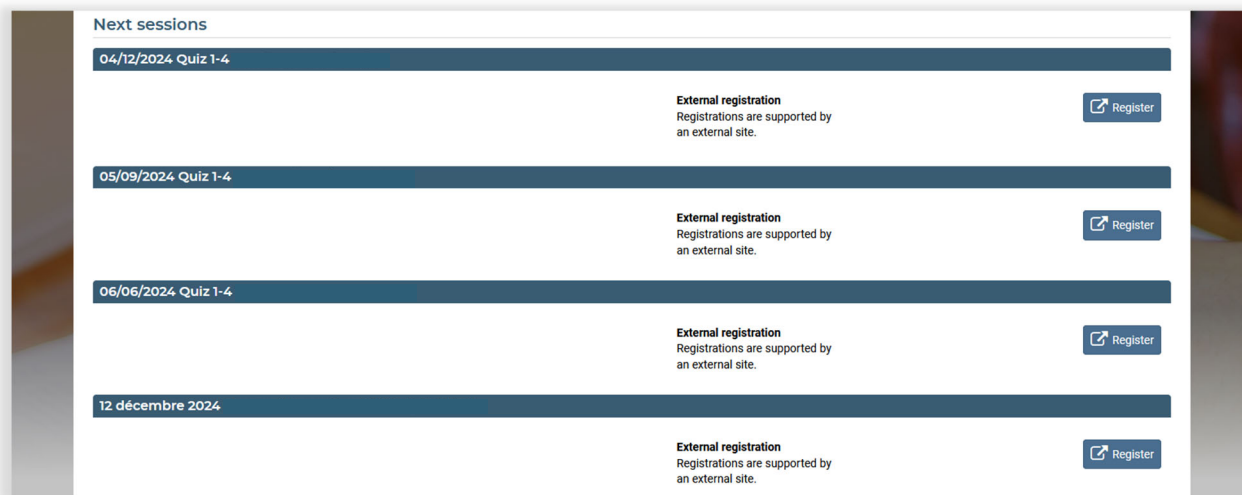
To deactivate the old sessions, go to the "Duration" tab and enter the date and time of the training sessions already delivered. They will disappear from the catalogue, and it will no longer be possible to register for them.

HOW TO CONFIRM THE REGISTRATION OF PARTICIPANTS FOR YOUR TRAINING SESSION FOR THE AWARDING OF CEUs?

After delivering a training course, you will need to enter the list of participants present into the Professional Development Portal so that they can obtain their Continuing Education Units (CEUs). To do so, follow these steps:

- In the left menu under the "Administration" section, click on "Training courses and events." You will see the training courses to which you have administrator access rights.

- Select the training course to which you wish to add participants.

- Select the session that corresponds to the date and time of the training given.

- Under the "Participants" icon, click on "Register participants by import."
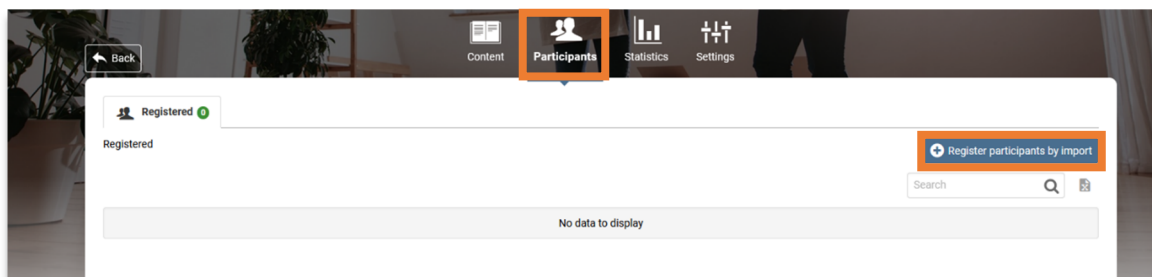
The web page to which you will be redirected includes instructions and templates showing you how to register your participants.

- On this page, you will find sample files in Excel format that you can use to import your participants.

Example of an Excel file to use:

In the "**noTitulaire**" column, enter the licence number of the participants who completed the training course.

	A	B	C	D	E	F	G	H	I
1	noTitulaire	Completed							
2	X1234	oui							
3	X1235	oui							
4	X1236	oui							
5	X1237	oui							
6	X1238	oui							
7	X1239	oui							
8	X1240	oui							
9	X1241	oui							
10	X1242	oui							
11	X1243	oui							
12	X1244	oui							
13	X1245	oui							

In the "**Completed**" column, enter "yes" for participants who completed the training course.

* Participants who have not completed the training course and therefore cannot obtain CEUs should not be included in the table.

It is essential to use one of the Excel templates provided to you without changing the format of the document's rows and columns. Any change will make the file incompatible with the Professional Development Portal when importing your list of participants, thus preventing the awarding of CEUs.

If you wish to make changes to a list that has already been submitted, contact the Training Department directly at accréditation@oaciq.com.