

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.

i General information	General information						
L Duration	Session name *						
A Grading							
	Minimum registration Maximum registration						
Administrative cost	0 0						
	Activate waiting list						
	Number of days the user has access to the content after registration (leave 0 not set a limit)						
	0 0						
	Number of days the user has to complete the content after registration (leave 0 not set a limit)						
	0 0						
	Hide the session from catalog						
	Display dates of planned activities in catalogs						
	Location						
	No specific location						
	Additional information						
	Compte GL comptabilité * ID Oracle Session						
В	Dispensateur - formation accréditée 👻						
	FAC_FK_TYPE FAC_HEURE_PREVUE						
	0						
	FAKE_ID Formateur						
	0						

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.



General information	Duration of the session						
Luration	Start End						
Pricing							
Completion							
Rrading							
B Administrative cost							

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":

Back	1			-				++† Settings # Manage registrations
Sessions 1	Registrations O X Wait	Completed: is no longer displayed in the catalogue of training courses. Not started: is displayed in the catalogue of training courses and available for registration.		ed es.)S Searc		Searc	 Duplicate session Generate list of participants (PDF) Generate list of participants (XLS) Subscriptions detail Generate tent cards
	Active Finished			-	, , ,	12 12	Dispensate accréditée Dispensateu accréditée	Generate name tags r - formation

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:

	Next sessions 04/12/2024 Quiz 1-4		
		External registration Registrations are supported by an external site.	C Register
	05/09/2024 Quiz 1-4		
Ż		External registration Registrations are supported by an external site.	C Register
	06/06/2024 Quiz 1-4		
		External registration Registrations are supported by an external site.	C Register
	12 décembre 2024		
		External registration Registrations are supported by an external site.	Register

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."

	Back Registered	Content Par	Statistics	┼┼┼ Settings				
Í	Registered				🕀 Register pa	rticipants by in	nport	
i i i					Search	Q		
-			No data to display					

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.

D

F



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

G

н

* 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 <u>accréditation@oaciq.com</u>.

