Company Administrators' FAQs

Introduction

These FAQs have been compiled to support those administrators who upload CPD evidence (certs or letters etc.) on the TTII's CPD platform on behalf of intermediaries; acting in a supporting role to assist their intermediaries/staff to create their journals for upload of CPD evidence (certs or letters etc.); and/ or generating and compiling reports on intermediary/staff CPD activity. These FAQs are therefore specific to administrators, although intermediaries can also perform some of these steps. They are as follows:

Question 1

I have been in touch with the following advisors who confirmed that they have completed their CPDs, however, whilst they are registered on the platform, when I run a journal report I am not seeing any CPD report generated for them?

Answer

There is a simple reason for that. None of the users **created a journal period** using the "**add period** button". If a journal period is not created it will not appear in the Journal Reports.

Question 2

My users are not seeing their uploaded content. What could be the problem?

Answer

They need to **create a journal period** for the journal entries they've created. Unless they've created a journal period that is in sync with their licence (Certificate of Registration) they more than likely will not see the uploads (journal entries). See steps below.

Step I: go to your account in the MYCPD section

Step II: Click the red **Add Period** Button

Step III: When the calendar appears, using the **end** and **start** dates select the dates that correspond with the dates on your license (Certificate of Registration) issue and renewal (expiry).

Step IV: Right below that you will notice a rectangle box that allows you to set the points/credits (CPD Hours) to 12 or over. Do so by typing in or adjusting up and down arrows.

Step V: Click **save** and **refresh** you screen. Your journals will now appear.

Question 3

When I try to run a report, no report is showing on my webpage. What could be the problem?

Answer

You ran the report using Internet Explorer. The system does not support this browser. Please use a modern browser like Google Chrome, Firefox, Safari etc.

Question 4

The submit for verification button is not **highlighting red** (becoming active) when I'm ready to submit. What could be the problem?

Answer

You must **populate all mandatory fields** (marked with asterisks) in your journals in order to be able to submit for verification. Especially the date field.

Question 5

How do I upload my Certificate of Registration (Insurance license issued by CBTT)?

Answer

The Certificate of Registration is uploaded the same way you upload you CPD letters, certificates etc. to your Journal entries. This is therefore just another **"false entry"** called Certificate of Registration. Just fill out the journal form under the Category "Other" etc. and make sure you populate all mandatory fields (marked with asterisks) before you save. This includes setting a date.

Question 6

In previous training session it was said that once you see the status **completed** in journal reports, it means the user was successful in their submission of CPD activities for verification. But now I see "accepted". Is this the same?

Answer

Yes, the status **accepted** is the same as **completed**. The user will see **completed** in their CPD account (MYCPD section with journals), but the Company administrator will now see **accepted** in the journal reports.

Question 7

In the CPD Journal Report kindly confirm the meaning of each status?

A. Accepted

Answer

The verification process was successful and the intermediary's letter is being processed.

B. Submitted

Answer

The candidate submitted for verification, their CPDs journals to the TTII**.**

C. In Progress (although seeing the attainment of CPD hours)

Answer

The candidate has not submitted for verification and most likely still doing CPDs or waiting a while before they submit.

Question 8

As a Company administrator on the platform can I have access to my user's accounts?

Answer

Yes. This must be requested at the time of registration of your intermediaries on the platform. This means you will receive and be responsible for their login info (credentials).

Question 9

A new section called "Dashboard" has appeared in my account, what is this for?

Answer

This section was added by CIVICA to provide summary information to Company Administrators on training enrolled in, started, and/or completed, as well as, the number of certifications achieved. In addition, it provides short cuts to the training not yet accessed.

Question 10

A new section called "Team" has appeared in my account, what is this for?

Answer

This section was also added by CIVICA to provide summary information to Company Administrators on electronic certificates earned and recorded in the platform, learning history and enrolments of their users or staff. Other activities like logins and content completion are also tracked. Note: This is still being beta tested and thus not is use at the moment.

End of Administrators’ FAQs

Note that the TTII is committed to supporting your user experience on the admin portal of the CPD Platform, thus theses FAQs will be updated as necessary.