Setting up and managing CPD

Switch CPD on, choose who records it, and see how everyone is doing against your target.

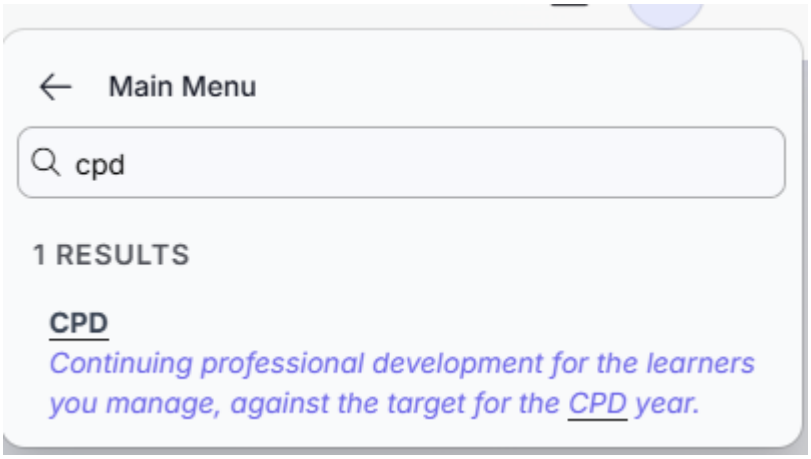
In this guide

Set up CPD
See your team's CPD
Add an entry for someone
Add an entry for several learners
Download records
FAQ

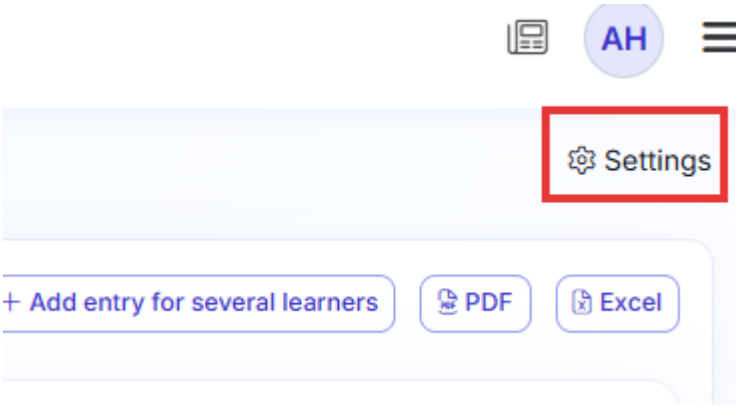
Set up CPD

For administrators. Learners and managers won't see CPD until you turn it on.

1 Click the menu icon, then search for **CPD** and click it

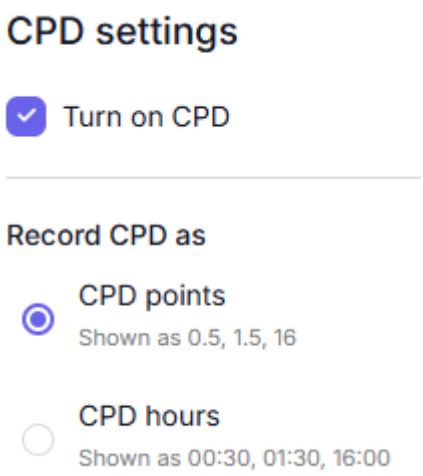


2 Click **Settings**



3 Choose whether to record CPD as **CPD points** or **CPD hours**

Points show as 0.5, 1.5 or 16. Hours show as 00:30, 01:30 or 16:00.



4 Choose **Who records CPD**

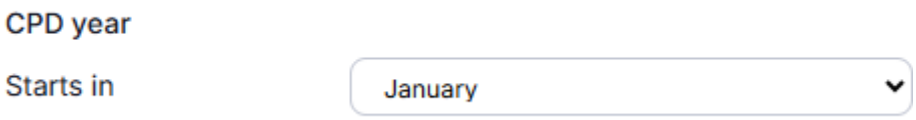
Leave it on Everyone, or choose Only some people and pick departments, job titles or additional field values. Anyone who matches any one of them records CPD.

Choosing a department includes the departments beneath it.



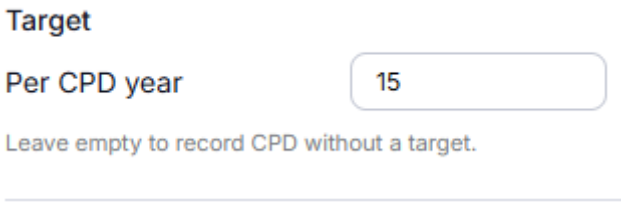
5 Choose the month your CPD year **Starts in**

Your CPD year runs for 12 months from the start of that month.



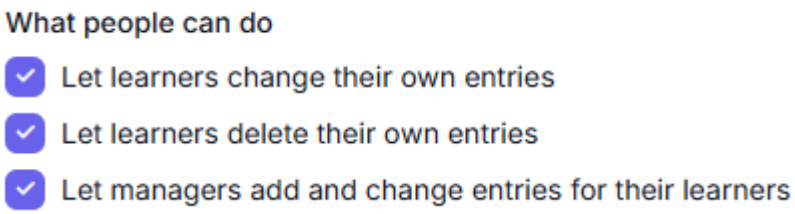
6 Set a **Target** for each CPD year

Leave it empty if you'd rather record CPD without a target.



7 Choose what people can do

Decide whether learners can change or delete their own entries, and whether managers can add and change entries for their learners.



8 Tick **Turn on CPD** and click **Save**

The people you chose now get a CPD tab on their record.



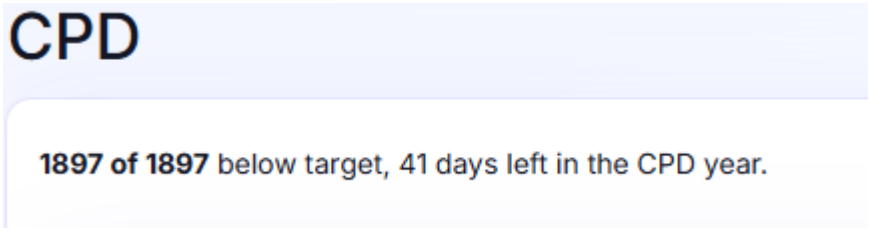
✓ **CPD is now switched on for your organisation.**

See your team's CPD

For managers and administrators. Managers see the people they manage who record CPD, and administrators see everyone who does.

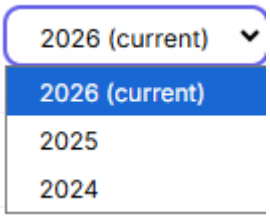
1 Click the menu icon, then search for **CPD** and click it

The people furthest from the target are at the top, so you can see who to chase first.



2 Choose a **CPD year** from the drop-down to look back

You can see the current CPD year and the two before it.



3 Click a name to see that person's CPD record

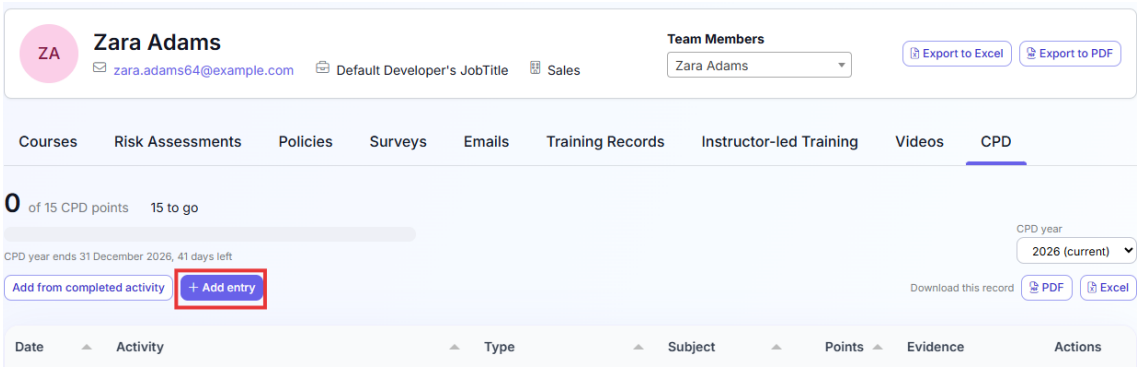
Use the search box to find someone quickly.



Add an entry for someone

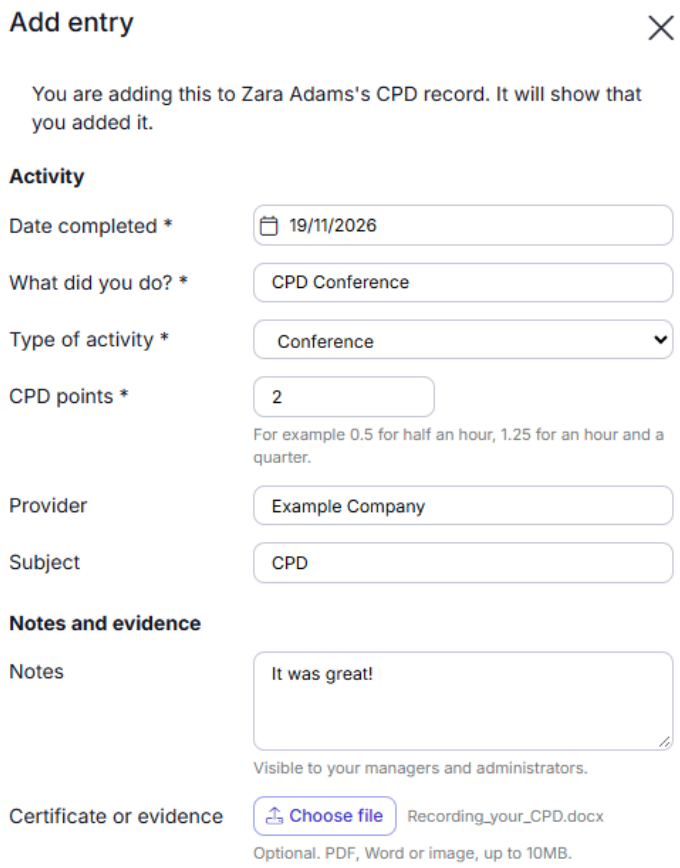
Managers can add entries for the people they manage, if your settings allow it. Administrators can add them for anyone who records CPD.

1 On the CPD page, click the person's name, then click **Add entry** on their CPD tab



2 Fill in what they did and click **Save**

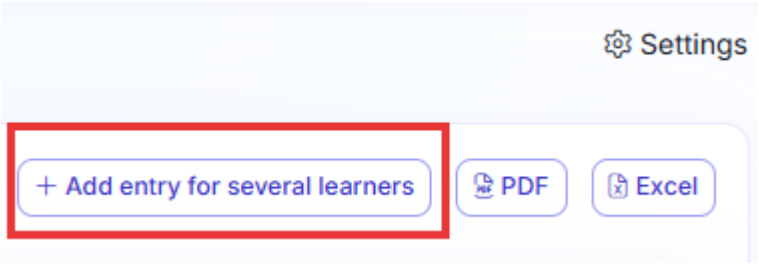
The entry shows Added by with your name, so they know where it came from.



Add an entry for several learners

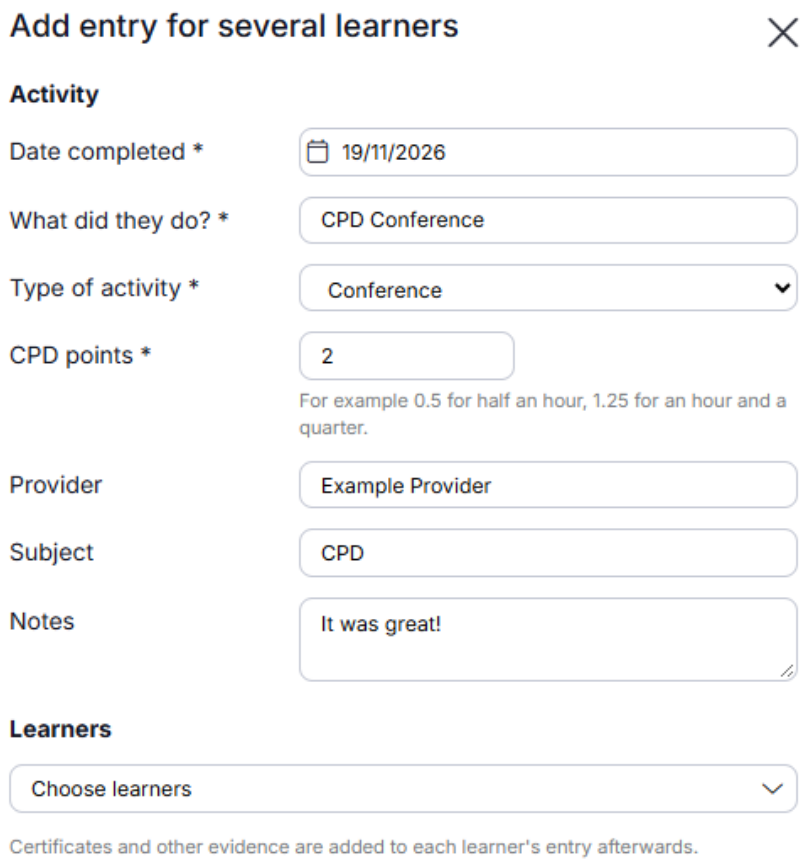
For something a group of people did together, such as a briefing or a conference.

1 On the CPD page, click **Add entry for several learners**



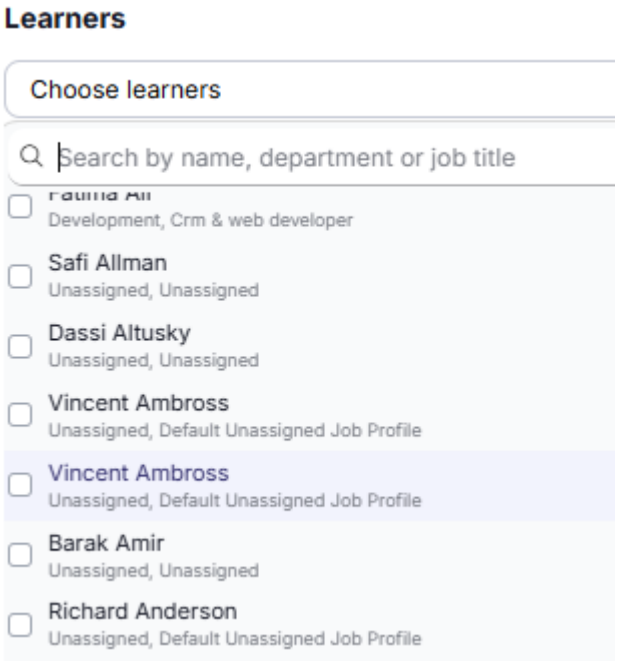
2 Fill in the activity

Date completed, what they did, the type of activity and how long it took are all needed.



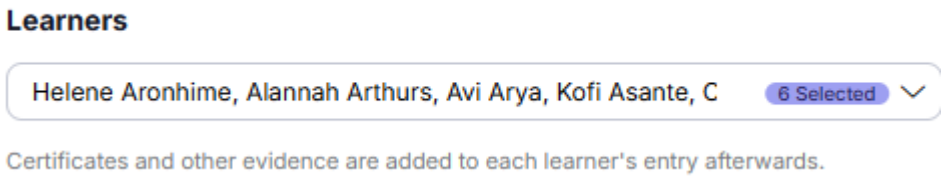
3 Choose the learners

Search by name, department or job title, then tick the people you want or click Select All. Only people who record CPD are listed.



4 Click **Save**

Each learner gets their own entry, so changing or deleting one later leaves the others alone.



✓ **The entry is now on each learner's CPD record.**

> **Certificates and evidence**
>
> These can't be added here. Add them to each learner's entry afterwards, from their CPD tab.

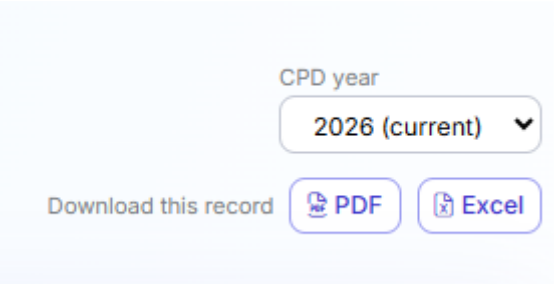
Download records

1 On the CPD page, click **PDF** or **Excel** to download everyone you can see

For a large organisation this can take a little while. The button shows Preparing until your file is ready.



2 For one person, open their CPD tab and click **PDF** or **Excel** next to Download this record



FAQ

Setting up

Who can change the CPD settings?
Administrators with full CPD access. Managers can see CPD for their own people but can't change the settings.

Why can't I see CPD in the menu?
If you're a manager, none of the people you manage may be set to record CPD. If you are an administrator, contact your account manager or Support, who can check your access.

Can we switch CPD off again?
Yes, in Settings. Learners and managers stop seeing it, and nothing that's been logged is lost.

Can we change between points and hours later?
Yes. It only changes how values are shown.

What happens if we change the month our CPD year starts?
Before anything changes, Astute tells you how many logged entries will move into a different CPD year and what the current CPD year will become. Confirm, and each entry moves into whichever CPD year its date now falls in.

Can different people have different targets?
Not at the moment. One target applies to everyone who records CPD.

Who records CPD

What if someone matches more than one of our choices?
They record CPD. Anyone who matches any one of the departments, job titles or additional field values is included.

What happens to someone who stops matching?
Their CPD tab goes and they drop off the CPD page, but their entries are kept. If they match again, everything is still there.

Recording CPD

Can learners add something they haven't done yet?
No. The date completed can't be later than today.

Can learners see each other's CPD?
No. Learners only see their own record.

Does instructor-led training count?
Yes, along with videos and policies. Learners add them from Add from completed activity on their CPD tab.

Professional bodies

Does Astute check our CPD against our professional body's rules?
No. CPD in Astute is a record of what's been done against your organisation's target. It's still up to you to make sure you meet any requirements your professional body sets.

Need a hand?
Contact your account manager or astutesupport@vinciworks.com