SAVC CPD PROVIDER PORTAL OVERVIEW
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**Glossary**

South African Veterinary Council ......................................................................................... SAVC

Continuing Professional Development .................................................................................. CPD

Multiple Choice Questionnaire ............................................................................................. MCQ
1. **Executive Summary**

   The SAVC CPD Provider Portal allows for CPD providers to apply for accreditation of activities presented to SAVC Registrees. Registrees attending these activities will automatically be allocated CPD points as specified in the registered activity.

2. **Website Overview**

2.1 **Welcome Page**

The website is self-service site insofar as that the prospective provider needs to self-register before using the site. Once registered, the provider may apply for one or more activities.

Password reset (self-service) is also available during the login process.

All communication between the provider and the SAVC staff and Approval committee will be done via messages on this site and the corresponding SAVC admin site. Where appropriate, messages or the announcement of a message will also be sent via email.

An activity will go through stages until it is approved, and an approved activity is valid for 6 years.
2.2 Provider Registration
The following details are captured during registration:
- Username,
- Name of the Provider (Company name or individual)
- Physical address (including postal code)
- First- and surname of the contact person
- Contact telephone number
- Contact email address. The email address is verified during the registration process via an authentication code sent to the provided email address.

2.3 Main Menu
Once authenticated, the main menu with an overview page will be displayed.

The Message area contains status information and messages with regards to the registration process of an activity.

The main menu will be visible at all times for the full duration of the authenticated session. The menu consists of the following items:

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>The Overview Pages as described above.</td>
</tr>
<tr>
<td>CPD Activity Registration</td>
<td>Creating a new application for activity registration.</td>
</tr>
<tr>
<td>Maintain Activities</td>
<td>Maintain activities that are not yet registered and upload attendance information.</td>
</tr>
<tr>
<td>Maintain Provider Details</td>
<td>Maintain the contact details of the provider.</td>
</tr>
<tr>
<td>Maintain Presenters</td>
<td>Maintain a list of provider presenters and upload their CVs.</td>
</tr>
</tbody>
</table>
2.4 Maintain Presenters

Before you apply for accreditation first upload the presenters and their CVs. Presenters are maintained on a global (per provider) basis. This allows the provider to define a presenter and upload the presenter’s CV once and then use that presenter in multiple activities.

The following information is captured for a presenter:

![Registered Presenters](image)

The CPD Activity Registration main menu option is the starting point for applying for accreditation. The activity registration application process guides the provider through several screens.

Based on the answers on the first screen, the second will either be extra information needed for a late submission, or more details about the activity such as venue contact details and the date or dates of the activity at the specified venue or venues.
2.5.1 Apply for a new activity

Apply for new Activity

Activity Name
Provider Category: Please select
Activity Type: Please Select

Target Professions:
- Veterinarians (D)
- Veterinary Specialists (S)
- Compulsory Veterinary Community Service (CS)
- Animal Health Technicians (N)
- Laboratory Animal Technologists (L)
- Veterinary Nurses (V)
- Veterinary Technologists (T)
- Veterinary Physiotherapists (VP)

Formal Contact Hours
Social Contact Hours
Total Activity Duration
Attendance Monitoring Method
Method of Evaluation

Include Practical: Yes or No
Late Submission: Yes or No

Save and Continue to Next Step

2.5.1.1 Provider Category

Select one of the available categories or choose “other” to provide a customised provider category.

Please note that the above list is for demonstration purposes only, the actual list in the system may change over time.
2.5.1.2  Activity Category

Select one of the possible Activity Categories from the drop-down list or choose “other” to provide your own category.

![Activity Category dropdown list]

Please note that the above list is for demonstration purposes only, the actual list in the system may change over time.

2.5.1.3  Target Professions

Select one or more target professions from the options provided.

![Target Professions list]

Please note that the above list is for demonstration purposes only, the actual list in the system may change over time.

2.5.1.4  Contact hours / Activity Duration

Please capture rounded amounts (hours). The Committee allocate CPD points according to the activities on your programme. The programme is essential, as this gives a very good idea of actual contact time.
### 2.5.1.5 Activity Registration Validations

The following validations will be carried out during saving of the first step of registration:

#### Apply for new Activity

- **Activity Name**
  - Please provide the Activity Name

- **Provider Category**
  - Please select a Provider Category

- **Activity Type**
  - Please select an Activity Category

- **Target Professions**
  - Veterinarians (D)
  - Veterinary Specialists (S)
  - Compulsory Veterinary Community Service (CS)
  - Animal Health Technicians (TH)
  - Laboratory Animal Technologists (LT)
  - Veterinary Nurses (V)
  - Veterinary Technologists (T)

- **Formal Contact Hours**
  - Please complete the Formal Contact Hours

- **Social Contact Hours**
  - Please complete the Social Contact Hours

- **Total Activity Duration**
  - Please complete the Total Activity Duration

- **Attendance Monitoring Method**
  - Please provide details about the Attendance Monitoring Method

- **Method of Evaluation**
  - Please provide details about the method of Evaluation

- **Include Practical**
  - Yes

- **Late Submission**
  - Yes

---

### 2.5.1.6 Activity Registration – Late Submission

If the “Late Submission” control of the previous step is marked as “Yes”, a second screen will be displayed where the Provider needs to confirm the following:

#### Late Application Confirmation for - Reasons for unusual hair loss

- **Confirm the Course took Place**
  - Yes
  - No

- **Copy of Proceedings were Handed Out**
  - Yes
  - No

- **Was there any Deviation from the programme**
  - Yes
  - No

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If the provider marks the “Was there any deviation from the programme” as “Yes”, an extra field is display where the deviation needs to be explained.

### 2.5.1.7 Activity Registration - Details

After saving the previous step, a screen will be presented to capture the detail of the activity venue and dates.

In order to provide for an activity to have recurring events (at the same or different venues), the activity registration date and venue details is handled as a separate screen.

At least one activity detail must be completed before submitting the application for accreditation.
This is also where the presenters are linked to the activity as it is possible that different presenters may be used at different venues. For details about how to create a provider presenter, see the “Maintain Presenters” section.

To link the provider presenters, click on the “Presenters” button next to an activity detail entry. Select the presenters for the activity at the specific venue by clicking on the “Add to List” button. Note: Because the CVs for provider presenters are uploaded globally through the “Presenters” main menu option, the CV will automatically be available for this activity.

Also, note that only presenters with valid uploaded CVs will be available for selection. If a specific presenter is not displayed, please go to the Presenters menu and upload a recent copy of the presenter’s CV.
2.6 **Maintain Activities**

The "Maintain Activities" main menu option is used to maintain the details of an activity. The starting point is a list of all activities created by the provider, with their current application statuses. It is displayed in descending order (oldest one at the bottom).

![Maintain Activities Table](image)

Next to each activity are action links to the actions available for that activity. The actions available will differ based on the status of the activity. For instance, an approved activity will only have the options "View Activity" and "Update Attendees" and the "Update Attendees" action is only available for a late submission and an approved activity.

The following actions may be performed on an activity:

- View Activity
- Update
- Late Submission
- Activity Details
- Supporting Documents
- Update Attendees
- Remove Application
- Submit for accreditation
2.6.1 View Activity

This page gives an overview of all the information captured for the activity with links to download all attachments.
2.6.2 Update
On this screen the provider may modify the captured detail as required.

![Maintain Activity Application](image)

2.6.3 Late Submission
When the activity is marked as a late submission, the late submission information may be selected here.

![Late Application Confirmation for - Lecture at](image)

All late submissions must also be accompanied by the list of attendees. When clicking on the "Save and Continue to Next Step" button, the “Activity Attendance” screen will be the next step. For details about “Activity Attendance”, see “Update Attendees” below.
2.6.4 Activity Details

The same screen for capturing the activity details such as venues, dates and presenters as described previously, will be displayed when you click on this link.

2.6.5 Supporting Documents

Based on the activity type selected, certain supporting documents must be uploaded before submitting the application for accreditation.
The screen consists of two sections, the top section describes the type of documents required, with a button to upload the document for each type. It also shows in brackets whether the document type is required or optional. The bottom section displays a list of already uploaded documents, with an option to download to view the document and an option to remove the document. Note it is possible to upload multiple documents of the same type.

All uploaded documents will be available to the Accreditation Committee after submission via an equivalent link.

2.7 UPDATE ATTENDEES

The portal provides an interface for the providers to upload the attendance register for all attendees after completion of the activity. The “Update Attendees” action is only available for a late submission and an approved activity.

The Provider portal has the functionality to add attendee detail either as single entries or as a bulk upload.

The screen consists of three sections, namely;
- The top section where individual registrees are added to the attendance register
- The middle part where a bulk upload facility is provided for uploading registrees’ attendance information
- The bottom section displays a list of attendees with the option to remove an attendee.
There is a link available (see screen print above) to download an example bulk upload file. Use this as a guide to prepare the upload file.

You need the following information for the upload file:
- Registrant’s registration number
- Attendance year
- Attendance month
- Attendance day
- Structured point.

Upload a spreadsheet as per the example below.

1. Place each column heading in its **own column**. This means that the excel file must have **5 columns**.

<table>
<thead>
<tr>
<th>registree_regno</th>
<th>attendance_year</th>
<th>attendance_month</th>
<th>attendance_day</th>
<th>structured_point</th>
</tr>
</thead>
<tbody>
<tr>
<td>V00/00000</td>
<td>2019</td>
<td>8</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>L00/00000</td>
<td>2019</td>
<td>8</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>T00/00000</td>
<td>2019</td>
<td>8</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>L00/00000</td>
<td>2019</td>
<td>8</td>
<td>7</td>
<td>5</td>
</tr>
</tbody>
</table>

**Do not use any spaces in the numbers, dates or between lines.**

2. The date must be a valid date, not a date range. Use the **start date of the activity** as the date.

3. When saving the upload-file in Excel, make sure to select the "CSV (Comma delimited) (*.csv)" option. Once saved as a *.csv file it will display as follows:

```
registree_regno,attendance_year,attendance_month,attendance_day,structured_point
V00/00000,2019,8,7,5
L00/00000,2019,8,7,5
T00/00000,2019,8,7,5
L00/00000,2019,8,7,5
```

**2.7.1 Edit or delete attendee uploads**

Select “Delete” under the “Action” column next to an attendee’s name. Reload as a single upload.

**2.8 Remove application**

Until the application is submitted for accreditation, the provider may remove the application. This option will not be available once the application was submitted for accreditation.
As this is an irreversible action, a confirmation message will display before the removal process starts.

2.9 **Submit for Accreditation**

Once the provider has met all the requirements, the application for accreditation can be submitted.

When the provider clicked on the "Submit for Accreditation" link, an overview page will be displayed. If there are still outstanding requirements, a message will be displayed in red and a button will be available to take him to the necessary screen to complete the requirements.

Once all requirements are met, the "Return to Activities" button will be replaced with a button to submit the application.

During this submission process, the status will be updated and emails will be sent out as per the requirements.