SAVC CPD PROVIDER PORTAL OVERVIEW AND ADMINISTRATORS GUIDE
1. EXECUTIVE SUMMARY ................................................................. 3
2. WEBSITE OVERVIEW ............................................................... 3
   2.1 Welcome Page............................................................................. 3
   2.2 Provider Registration............................................................... 3
   2.3 Main Menu ............................................................................ 4
   2.3.1 CPD Activity Registration .................................................... 4
   2.3.2 Activity Registration – Late Submission ............................... 7
   2.3.3 Activity Registration - Details.............................................. 8
   2.4 Maintain Activities................................................................. 9
   2.4.1 View Activity............................................................ 10
   2.4.2 Update............................................................................. 11
   2.4.3 Late Submission .............................................................. 11
   2.4.4 Activity Details................................................................. 12
   2.4.5 Supporting Documents ..................................................... 12
   2.4.6 Submit for accreditation.................................................... 14
   2.5 Maintain Presenters ............................................................... 15
3. DOCUMENT RULES AND ADMINISTRATION .................................. 16
   3.1 Copyright and Confidentiality .............................................. 17
   3.2 Document Control................................................................. 18

Glossary
South African Veterinary Council ..................................................... SAVC
Career 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 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>Overview</th>
<th>The Overview Pages as described above.</th>
</tr>
</thead>
<tbody>
<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 has not been registered yet and also upload attendance information such as the attendance certificate</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>

2.3.1 CPD Activity Registration
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.
Options for the following prompts are maintained in the SAVC Administration backend.

2.3.1.1 Provider Category

Provider Categories are maintained in the SAVC Administration backend system. For demonstration purposes the following categories were captured:

When a category is marked for “Needs Explanation”, it will result in an extra prompt where the provider needs to provide more detail about this custom selected category. See example screen print above. This functionality was implemented to cater for the requirement “Other Provider Category”.

2.3.1.2 Activity Category

Possible Activity Categories are maintained in the SAVC Administration backend system.
For demonstration purposes the following categories were captured:

<table>
<thead>
<tr>
<th>Description</th>
<th>Date Bound</th>
<th>Needs Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Article / Magazine Quiz</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Webinar</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Wet Lab</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Internet or Electronic</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other (Please Specify Below)</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

If an activity is marked as “Date Bound”, then the activity dates will be validated against the 6 months window as per requirements (must not be older than six months or more than 6 months in the future).

If the activity is marked for “Needs Explanation”, and extra prompt will be displayed where the provider needs to define the activity. This functionality was implemented to cater for the requirement “Other Activity Category”

2.3.1.3 Target Professions

Possible Target Professions are maintained in the SAVC Administration backend system.

For demonstration purposes the following professions were captured:

The “Structured Points” column will contain the CPD points required by that profession group for a 3-year cycle. Carrying this requirement against the profession will aid in the automation of the system.
2.3.1.4 Activity Registration Validations

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

**Apply for new Activity**

- **Activity Name**: Please provide the 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 (H)
  - Laboratory Animal Technologists (L)
  - 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 or No
- **Late Submission**: Yes or No

**Save and Continue to Next Step**

2.3.2 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 or No
- Copy of proceedings handed out: Yes or No
- Was there any deviation from the programme: Yes or No

**Save and Continue to Next Step**

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.
2.3.3 Activity Registration - Details

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

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.

2.4 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 status. They are displayed in descending order (oldest one at the bottom).

Next to each activity is 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” available 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
2.4.1 View Activity

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

![Maintain Activity Application](image)

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

![Late Application Confirmation](image)

All late submission 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 detail about “Activity Attendance”, see “Update Attendees” below.
2.4.4 Activity Details

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

![Activity Details](image)

2.4.5 Supporting Documents

Based on the activity type selected, certain supporting documents must be uploaded before submitting for accreditation.

![Supporting Documents](image)
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 view) the document and also 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.

### 2.4.6 Update Attendees

The portal provides an interface for the providers to upload the attendance register for all attendees after completion of the activity. Attendance confirmation is in the form of the approved attendance certificate.

This process will also automatically add the allotted CPD points to the attendee’s SAVC record. The certificates will be stored along with all other documents in the Registree’s SAVC folder, and is available to the Registree via the Registree portal.

![Activity Attendance](image)

The screen consists of two sections, namely;
- The top section where a registree is selected and the certificate uploaded,
- And the bottom section where the list of registrees with links to their certificates are displayed.
- The bottom section also allows for the removal of an incorrect attendee.

To upload a certificate, the Provider must supply the Registree’s official registration number. This requirement is by design.
2.4.7 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 is display before the removal process starts.

2.4.8 Submit for accreditation
Once the provider has completed all requirements the application may be submitted for accreditation.

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 applications.

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

2.5 **Maintain Presenters**

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:

- **Title**
- **First Name(s)**
- **Surname**
- **Id Number**
- **Telephone Number**
- **Email**
3. SAVC Administration Functionality

3.1 Defining Supporting Document Types

A maintenance screen will be available in the SAVC Admin System to define the supporting document requirements per activity type.

For demonstration purposes the following document requirements were created:

<table>
<thead>
<tr>
<th>Activity Category</th>
<th>AttachmentName</th>
<th>AttachmentHint</th>
<th>AllowableExtensionTypes</th>
<th>Optional</th>
<th>Late ApplicationDate</th>
<th>Link Prompt</th>
<th>Link URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecture</td>
<td>Proforma certificate</td>
<td>The following are guidelines for the...</td>
<td>docx/odf/pdf</td>
<td>0</td>
<td>Download example proforma...</td>
<td><a href="http://www.savc.org.za/docs/regulations">http://www.savc.org.za/docs/regulations</a>...</td>
<td></td>
</tr>
<tr>
<td>Programme</td>
<td>Programme</td>
<td>Final programme of the Event</td>
<td>NULL</td>
<td>NULL</td>
<td>1</td>
<td>See guideline for creation of...</td>
<td><a href="http://www.savc.org.za/docs/regulations">http://www.savc.org.za/docs/regulations</a>...</td>
</tr>
<tr>
<td>Lecture</td>
<td>Presentations</td>
<td>Submit all presentations as per the...</td>
<td>NULL</td>
<td>NULL</td>
<td>NULL</td>
<td>1</td>
<td>See guideline for creation of...</td>
</tr>
<tr>
<td>Article / Magazine Quiz</td>
<td>Multiple Choice Questionnaire</td>
<td>Submit a Multiple Choice Questionnaire...</td>
<td>docx/odf/pdf</td>
<td></td>
<td>1</td>
<td>See guideline for creation of...</td>
<td><a href="http://www.savc.org.za/docs/regulations">http://www.savc.org.za/docs/regulations</a>...</td>
</tr>
</tbody>
</table>

An explanation of some of these columns is important. To make it more clear, please refer to the “Supporting Document” section in this document to relate the meta data to the positions on the screen.

The supporting documents are capture per Activity type and is therefore accessed via the Activity Types maintenance screen of the SAVC Administration System:

The following is a screen print of the Supporting documents update screen.

3.1.1 Attachment Hint

Based on the examples provided, that attachment hint text follows a specific format.
The “|” (pipe) character is a special character for this field, and will be used to split the text into multiple lines.

It will follow this formatting rules:

1. If only text without any special characters are entered, it will be displayed as a single paragraph without any extra formatting.
2. If a “|” (pipe) character or multiple “|” characters are found in the text, the text will be split into multiple lines.
3. The first subset of text before the first “|” character will be displayed as normal text.
4. Any text after the first pipe will be displayed as a bullet list.

Here is an example as taken from the requirements:

(The “|” character is marked in red for clarity sake)

The following are guidelines for the proforma certificate|Name and SAVC registration number of attendee of CPD activity|Name of provider of the activity|Name of the activity/course.|Date of the activity.|South African Veterinary Council’s reference number of the activity.|Space for CPD accreditation number.|CPD points allocated per lecture/per day/per full event.|Signature of the provider of the event.

And this is how it will be display:

<table>
<thead>
<tr>
<th>Proforma certificate</th>
<th>The following are guidelines for the proforma certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Name and SAVC registration number of attendee of CPD activity.</td>
</tr>
<tr>
<td></td>
<td>• Name of provider of the activity.</td>
</tr>
<tr>
<td></td>
<td>• Name of the activity/course.</td>
</tr>
<tr>
<td></td>
<td>• Date of the activity.</td>
</tr>
<tr>
<td></td>
<td>• South African Veterinary Council’s reference number of the activity.</td>
</tr>
<tr>
<td></td>
<td>• Space for CPD accreditation number.</td>
</tr>
<tr>
<td></td>
<td>• CPD points allocated per lecture/per day/per full event.</td>
</tr>
<tr>
<td></td>
<td>• Signature of the provider of the event.</td>
</tr>
</tbody>
</table>

3.1.1.1.1  Allowable Extension Types

Initially it was decided that all attachments need to be in PDF format, but then I was told that all attachments need to be in MS word format to allow the Accreditation Committee to edit the documents received.

This requirement may be proved to be not a practical option as certificates are normally not designed in MS Word, and most providers will be unwilling to provide a copy of a published article in Word format for editing purposes.

A better approach will therefore be to provide an option to define the document extension types per document requirement.

A similar formatting rule was implemented to allow for multiple extensions per requirement. Use the “|” character to separate the allowable extensions.

As an example, to allow for MS Word as well as PDF documents the following will should be entered in this cell: “doc|docx|pdf”. (The pipe characters are shown in red for clarity purposes)

4.  DOCUMENT RULES AND ADMINISTRATION

4.1  COPYRIGHT AND CONFIDENTIALITY

No part of this document may be reproduced, transferred, sold, or otherwise disposed of, without the written permission of BCX.
This document may be used and copied within SAVC for use in relation to this project. No copies may be forwarded to any person who is not an employee or agent of SAVC or BCX without the prior written approval of BCX Management.

4.2 DOCUMENT CONTROL

<table>
<thead>
<tr>
<th>REVISION</th>
<th>DATED</th>
<th>REVISED BY</th>
<th>DESCRIPTION OF MAJOR CHANGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>31 Oct 2018</td>
<td>Johann van der Walt</td>
<td>Original</td>
</tr>
<tr>
<td>1.1</td>
<td>25 Feb 2019</td>
<td>Johann van der Walt</td>
<td>Add more information</td>
</tr>
</tbody>
</table>

Please advise the Business Analyst of any concerns or discrepancies relating to this document.

- Errors
- Omissions
- Ambiguities
- Requests for change
- Suggestions for improvement