



SkillsBackbone

2020

Individual CPD  
Mid-Term Review  
User Manual

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## Document Status

Issue Status	Version	Updated	Published
First Publication	1.0	N/A	14/01/2020

### Important Note:

*The screenshots contained within this user manual have been created using live provider information in order to make the manual as realistic as possible. Names of Trainer/Assessors have been removed in order to maintain data privacy. Where Trainer/Assessors names have been removed, your own name will display resulting in your view not showing as this user manual in every aspect of screen information.*

*This manual was created during system development and, therefore, may be slight variances in what is seen within this manual to what is displayed in the system. This manual will be updated to capture major updates to functionality only.*

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**NSAR LIMITED, 11 CARTERET STREET,  
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## 1. Logging in

Log In using the URL link and password which you have been issued. You will be taken to your landing page which is your Individual Overview

## 2. Overview

Your log in will take you to your landing page which remains the Individuals dashboard which shows the number of CPD hours logged, the total hours required and the number of days remaining for the final CPD portfolio submission.

## 3. The CPD Mid-Term Review [15 hours]

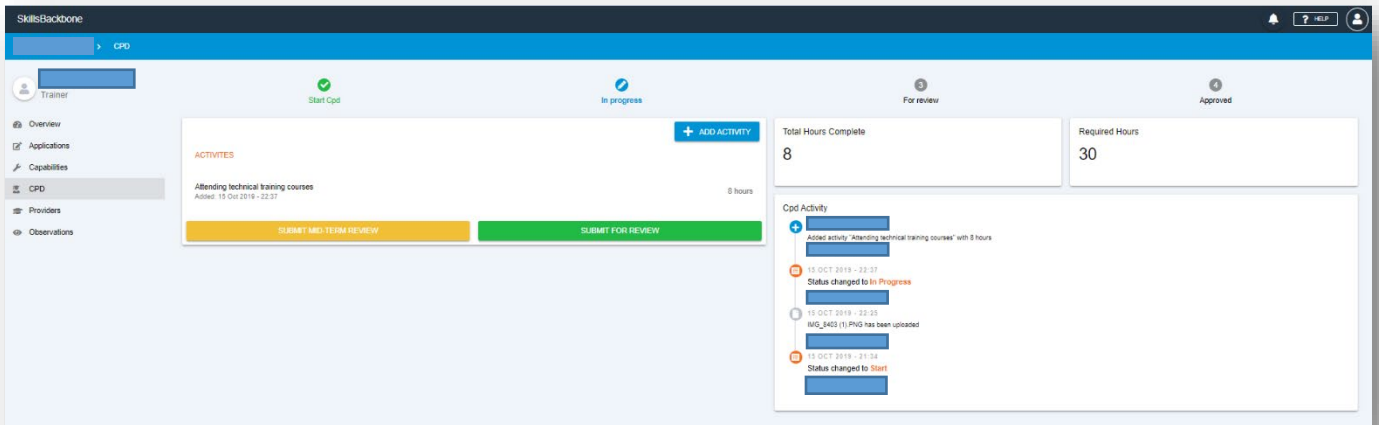
### 3.1. Completing the mid-term review [15 hours]

The mid-term review is **not** mandatory and is an additional tool to support individuals collate a varied CPD portfolio with NSAR guidance from 15 hours if the individual wants it. The CPD summary page also remains unchanged and lists the outcome of previous year portfolio reviews with only the current year **ACTIVE** and **IN PROGRESS**

Period	Period Status	CPD Status	Total Hours	Required Hours	Updated At
1 Jul 2019 - 30 Jun 2020	Active	In Progress	8	30	15 Oct 2019
1 Jul 2018 - 30 Jun 2019	Closed	Approved	30	30	
1 Jul 2016 - 30 Jun 2017	Archived	Approved	30	30	

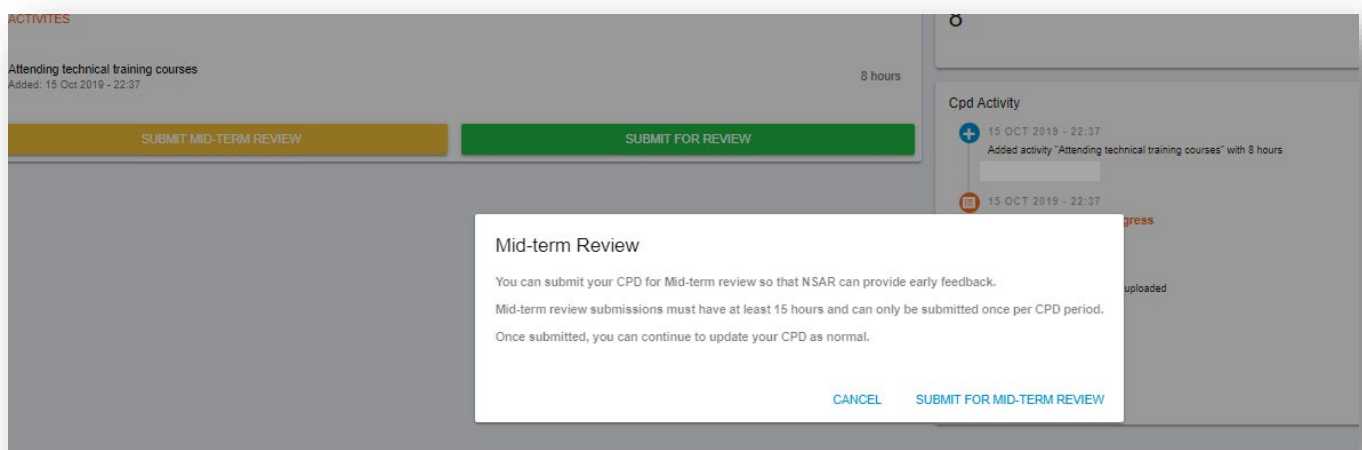
To upload CPD, click on **IN PROGRESS** which takes you to the current years portfolio which is where you will note the first visible changes in the addition of a **SUBMIT MID-TERM REVIEW** button.

The full CPD year submission can still be made from this screen if the individual opts **not** to have NSAR feedback on the development of their portfolio to date but not until the submission has reached **30 hours** in total



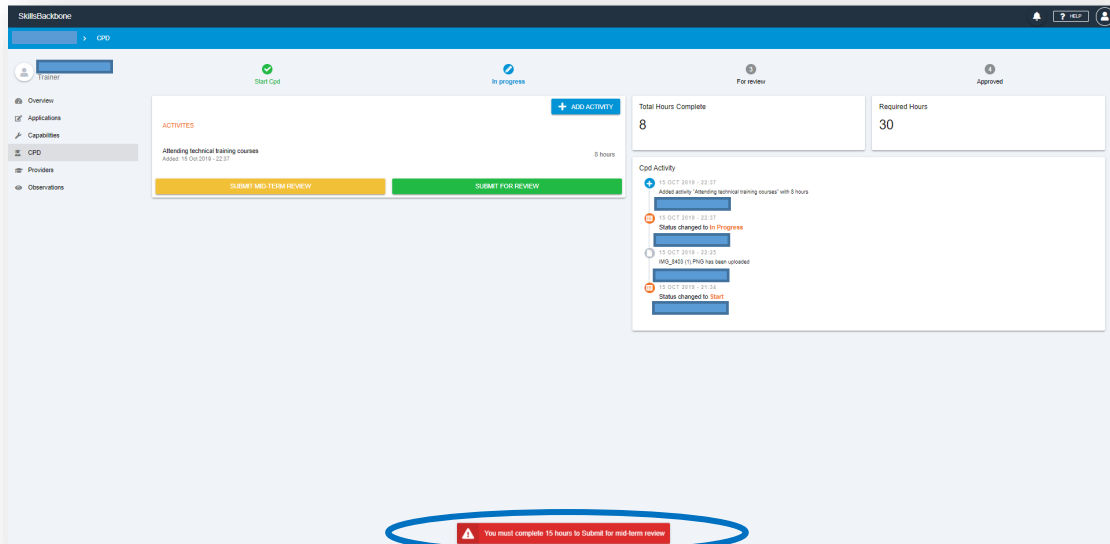
**NOTE:** The **Mid-Term review can be used only once** and must have a **minimum of 15 hours** input. Submitting a Mid-Term Review will **not lock you out of further uploads**.

When you **SUBMIT MID-TERM REVIEW** the system will remind you of the minimum requirements and ask you if you are sure by showing the below message

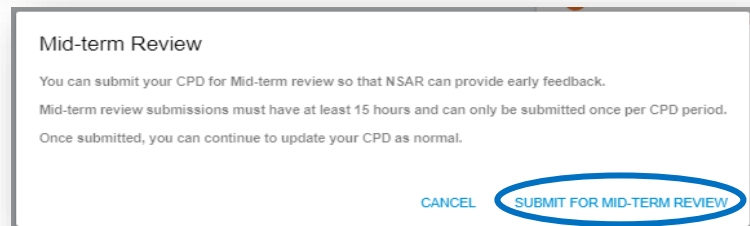


If you are happy to proceed then confirm by clicking **SUBMIT FOR MID-TERM REVIEW**

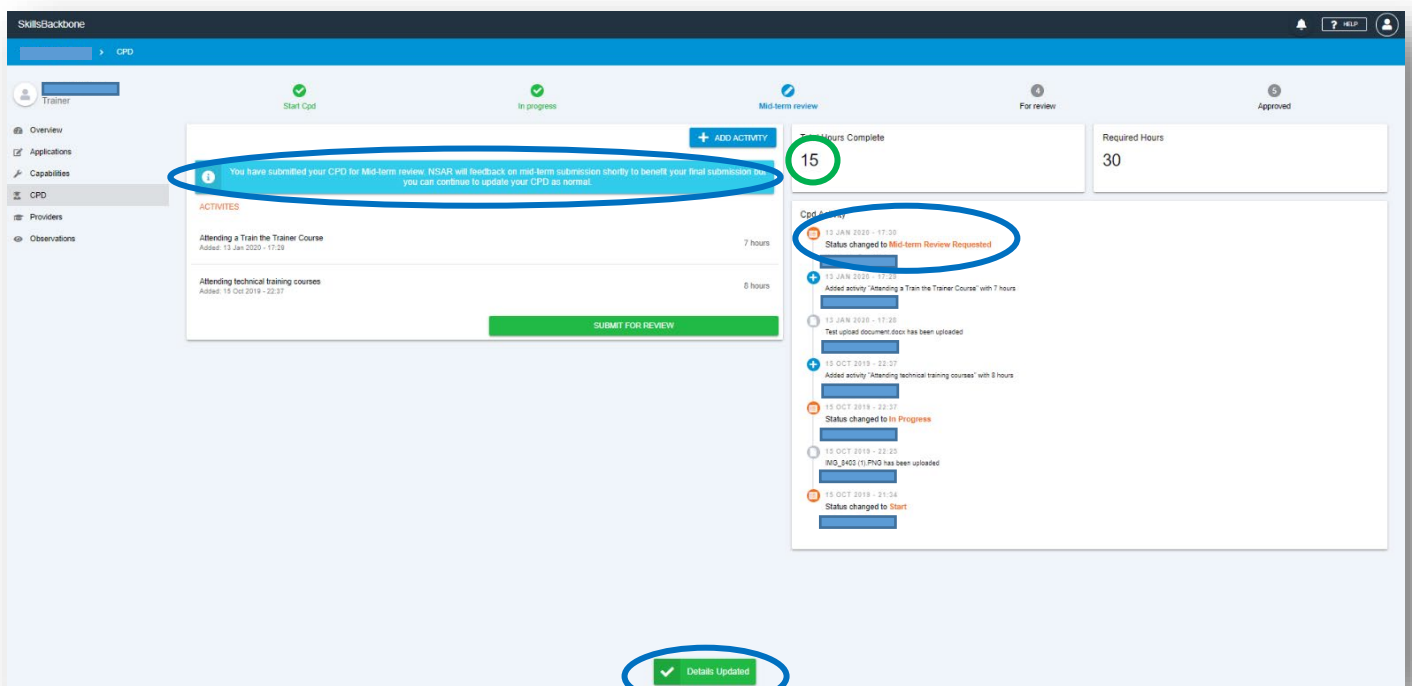
As the Mid-Term Review cannot be made until the portfolio has reached 15 hours. If you try to **SUBMIT FOR MID-TERM REVIEW** before then, the system will advise you that it cannot submit it via a red pop up warning.



Once the portfolio has reached 15 hours the system will allow **SUBMIT MID-TERM REVIEW**. The system will ask you for the same confirmation as before



Click **SUBMIT FOR MID-TERM REVIEW** and the system will confirm this has been done, show a blue banner as a reminder that CPD can continue to be uploaded during the mid-term review, the **SUBMIT MID-TERM REVIEW** disappears and timeline is updated.



## 3.2. Receiving NSAR Feedback of the Mid-Term Review [15 hours]

When NSAR has completed the Mid-Term Review you will see that the **blue banner** has been replaced by an **orange banner** containing the feedback

The screenshot shows the SkillsBackbone CPD dashboard. At the top, there are four progress indicators: 'Start Cpd' (green checkmark), 'In progress' (blue circle), 'For review' (3), and 'Approved' (4). The 'For review' indicator is active. On the left, a navigation menu includes Overview, Applications, Capabilities, CPD, Providers, and Observations. The main content area features an orange banner with a 'Mid-term review comment' stating: 'Reflections are short on detail. Please ensure reflections cover what you have learned and what you will do differently that benefits your delivery/knowledge/learners. Regards, QA'. Below this, a table lists activities: 'Attending a Train the Trainer Course' (7 hours), 'Attending technical training courses' (8 hours), and 'Undertaking structured development schemes' (3 hours). A green 'SUBMIT FOR REVIEW' button is at the bottom. On the right, a 'Total Hours Complete' box shows 18, and a 'Required Hours' box shows 30. A 'Cpd Activity' list on the right shows a sequence of events, including a status change to 'Mid-term Review Requested'.

**NOTE:** The feedback **does not need a response to, any resubmission or action to NSAR.** Any feedback from NSAR advising changes or improvements are for your own benefit to apply well in advance of the CPD year closing on 30th June each year.

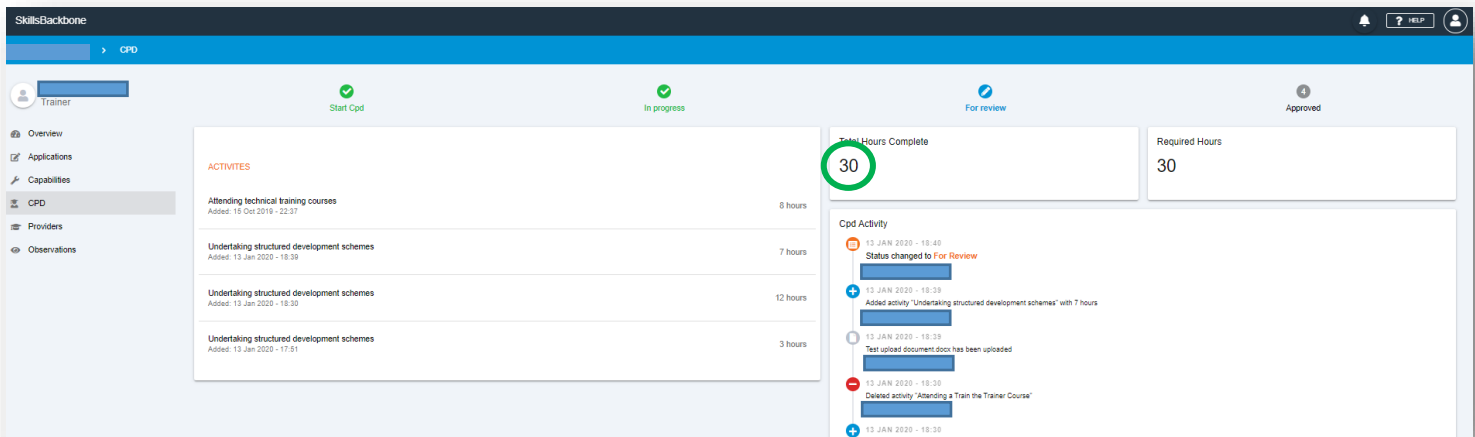
## 4. The CPD final submission [30 hours]

### 4.1. Submitting the final CPD Portfolio [30 hours]

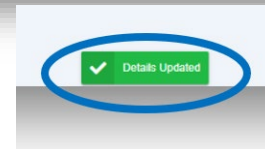
To submit your final CPD Portfolio you must input a minimum of 30 hours. If you try to **SUBMIT FOR REVIEW** before it has reached **30 hours**, the system will advise you that it cannot submit it via a red pop up warning.

This screenshot shows the SkillsBackbone CPD dashboard with a warning. The 'Total Hours Complete' box now shows 23, circled in red. The 'SUBMIT FOR REVIEW' button is circled in blue. A red warning banner at the bottom states: 'You must complete 30 hours to Submit for review'. The 'Cpd Activity' list on the right shows the current total of 23 hours, including activities from previous years (e.g., 15 JAN 2020, 15 OCT 2019) and a status change to 'In Progress'.

Keep adding to your CPD until you reach the minimum 30 hours required by NSAR Trainer/Assessor assurance and then you can **SUBMIT FOR REVIEW**

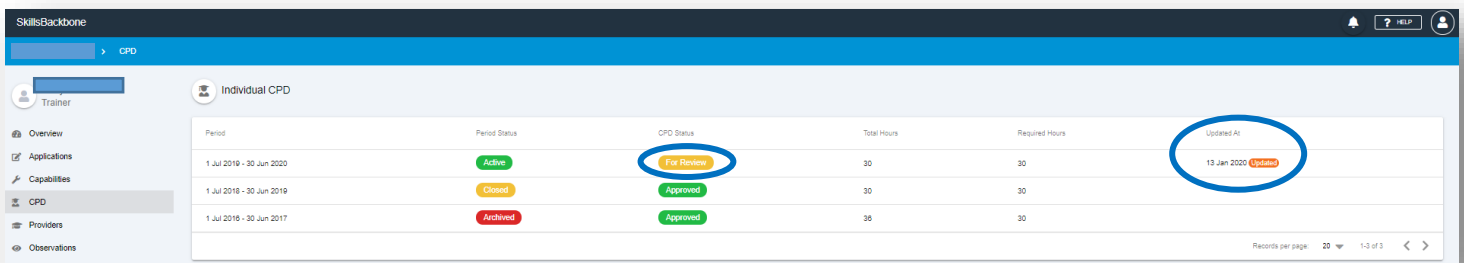


The system will also tell you on this screen that the Submission was successful by showing the **DETAILS UPDATED** message at the bottom of the screen



It is at this point that you are locked out from adding any further CPD or editing the CPD Portfolio submitted until NSAR have reviewed your end of year submission and, either, **approved** it, **rejected** it or [dependant on the time of year] returned it to you for **more information**.

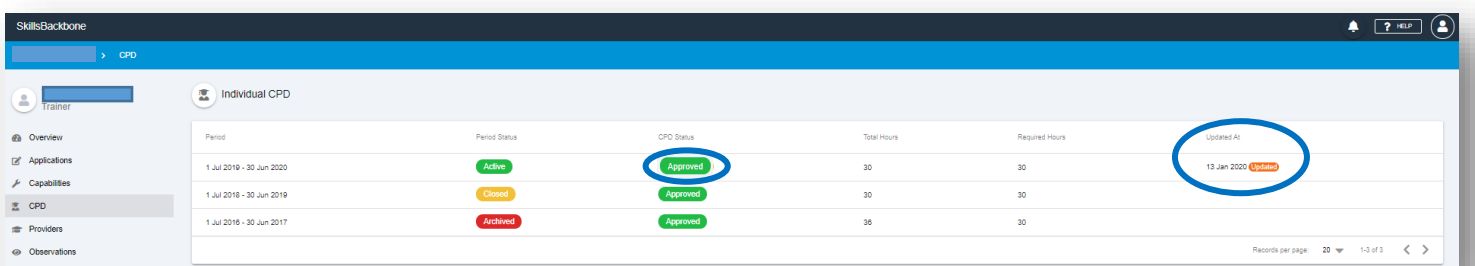
You will see the status of the final submission review in your CPD summary page



## 4.2. Receiving NSAR Feedback of the final CPD submission [30 hours]

When your final CPD submission has completed its review by NSAR and decision made of its approval status you will receive an email to your registered email address notifying you that there has been a change and asking you to log in.

If your application is **approved** you will see this icon against your year's submission



If there is sufficient time remaining in the CPD Year and there is **more information required** before it can be approved you will see this icon against your year's submission

Period	Period Status	CPD Status	Total Hours	Required Hours	Updated At
1 Jul 2019 - 30 Jun 2020	Active	More Information Required	30	30	13 Jan 2020 Update
1 Jul 2018 - 30 Jun 2019	Closed	Approved	30	30	
1 Jul 2016 - 30 Jun 2017	Archived	Approved	36	30	

If your application is **rejected** you will see this icon against your year's submission

Period	Period Status	CPD Status	Total Hours	Required Hours	Updated At
1 Jul 2019 - 30 Jun 2020	Active	Rejected	30	30	13 Jan 2020 Update
1 Jul 2018 - 30 Jun 2019	Closed	Approved	30	30	
1 Jul 2016 - 30 Jun 2017	Archived	Approved	36	30	

Where there is **more information required**. You can see the feedback by clicking on the icon itself. The feedback is detailed at, both, the top of the activity list and to the right-hand side on the activity timeline.

This CPD requires more information

The evidence attached to items added 15 October for 8 hours and 13 January for 3 hours are the same, please review, ensure the evidence for each is different and relevant and resubmit for approval. Regards, CA

**ACTIVITIES**

- Attending technical training courses  
Added: 15 Oct 2019 - 22:37 8 hours
- Undertaking structured development schemes  
Added: 13 Jan 2020 - 18:30 12 hours
- Undertaking structured development schemes  
Added: 13 Jan 2020 - 17:19 3 hours
- Undertaking structured development schemes  
Added: 13 Jan 2020 - 18:30 7 hours

**CPD Activity**

- 13 JAN 2020 - 18:40 Status changed to More Information Required  
The evidence attached to items added 15 October for 8 hours and 13 January for 3 hours are the same, please review, ensure the evidence for each is different and relevant and resubmit for approval. Regards, CA
- 13 JAN 2020 - 18:40 Status changed to For Review
- 13 JAN 2020 - 18:39 Added activity "Undertaking structured development schemes" with 7 hours
- 13 JAN 2020 - 18:39 Test upload document docx has been uploaded
- 13 JAN 2020 - 18:30 Deleted activity "Attending a Train the Trainer Course"
- 13 JAN 2020 - 18:30 Added activity "Undertaking structured development schemes" with 12 hours

### 4.3. Addressing NSAR Feedback of the final CPD submission [30 hours]

You are able to action the feedback as the CPD Portfolio is now fully editable again. Take the requested action and then **SUBMIT FOR REVIEW**. The system will then repeat the process outlined in section 4.1 above