LEGAL PRACTICE BOARD
OF WESTERN AUSTRALIA

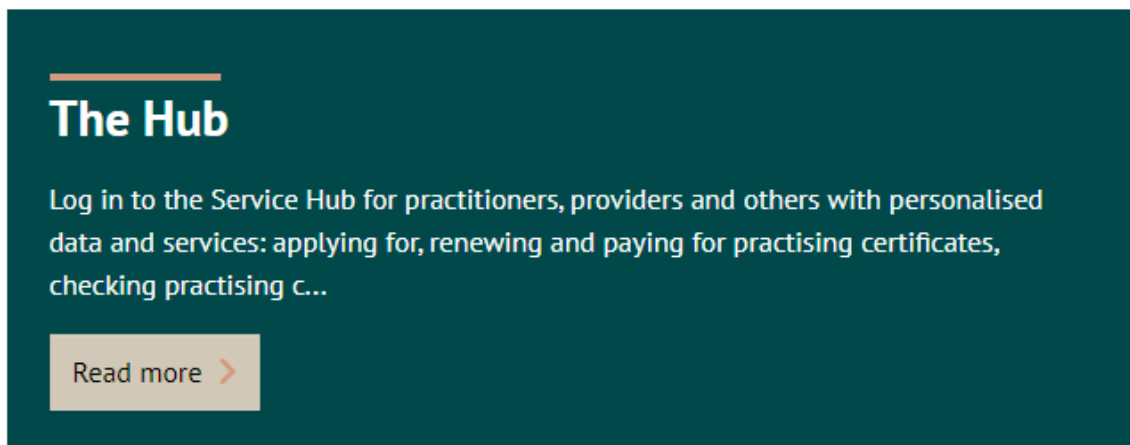# User Guide: CPDMS for Providers

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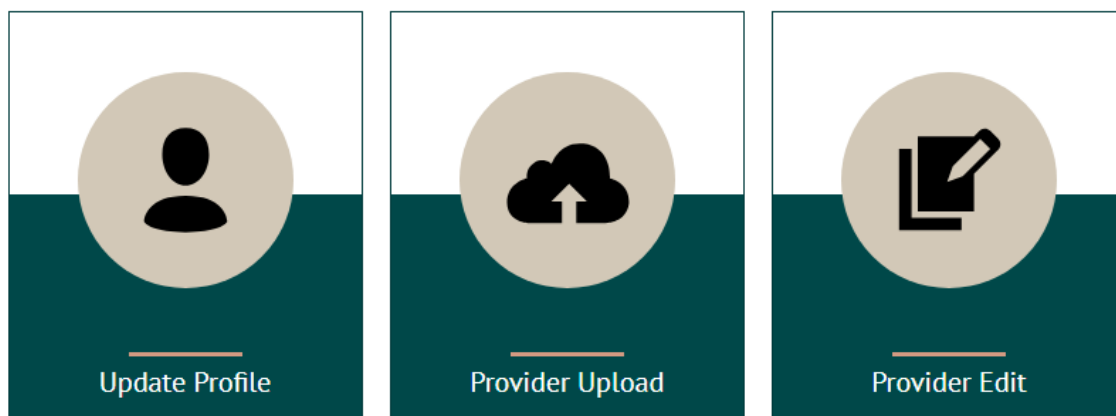| Document Objective ID:	A1437989
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Logging into the CPDMS

Logging in

1. Go to the [Board's website](#)

2. On the home page, click on the **The Hub** tile

3. Enter your login details provided to you by the Board and click **Log in**. If you have forgotten your password use the [forgot my details](#) link.

4. The site will take you **The Hub** and see following tiles. You may have access to others.

Uploading activities
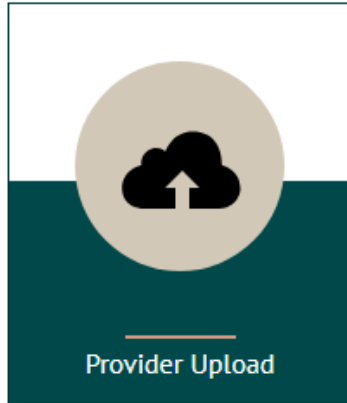
1. Click on the Provider Upload tile:

2

3. Find and attach your upload sheet

1. You should now be presented with a list of the data from your upload sheet on the screen.

2. If there are no errors found the **Import Data** button will be available to click o

3. If there are errors found you can review the data and any errors the system finds and make corrections.

Reviewing data and errors found with data in the upload sheet

Errors found will be made clear with the following:

- Red bar on the left of a record – indicates an error with that line
- Red text under fields – these will give an explanation as to what the problem is with the field for you to rectify the data.
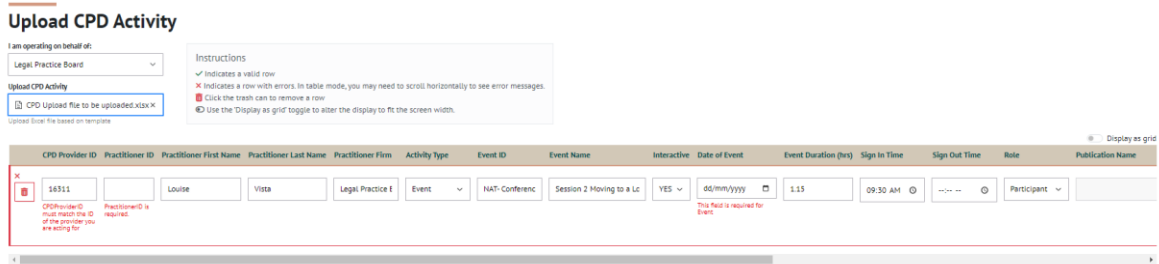
To fix errors you can:

1. Edit the specific field on screen;
2. Delete the row entirely by clicking on the red **trash can** icon on the left of the record
3. Choose to make changes to the spreadsheet itself and re upload. To cancel the upload, click the 'x' in the **Upload CPD Activity** field shown below..

4. If the error message isn't clear please advise CPDOperations@lpbwa.com and include your upload sheet and the specific line and field the system is indicating to be the problem

The error indicators (red outlines, bars, error messages) will disappear as errors are corrected.

The **Submit Data** button will be available once all data is correct and ready for importing into the CPDMS and updating records.

Other troubleshooting checks

For any other errors please check your spreadsheet for the following

1. Rows 1 and 2 are deleted
2. Field header row exists
3. All mandatory fields exist
4. There are no strange entries in any field outside the main area
5. There is only one tab within the upload sheet – the **Summary** tab should be deleted.
6. The sheet tab is labelled Data Upload
7. Interactive field must be Yes/No **not y/n**
8. Date fields = dd/mm/yy
9. Times should be in time format. Right click the field > format cell.
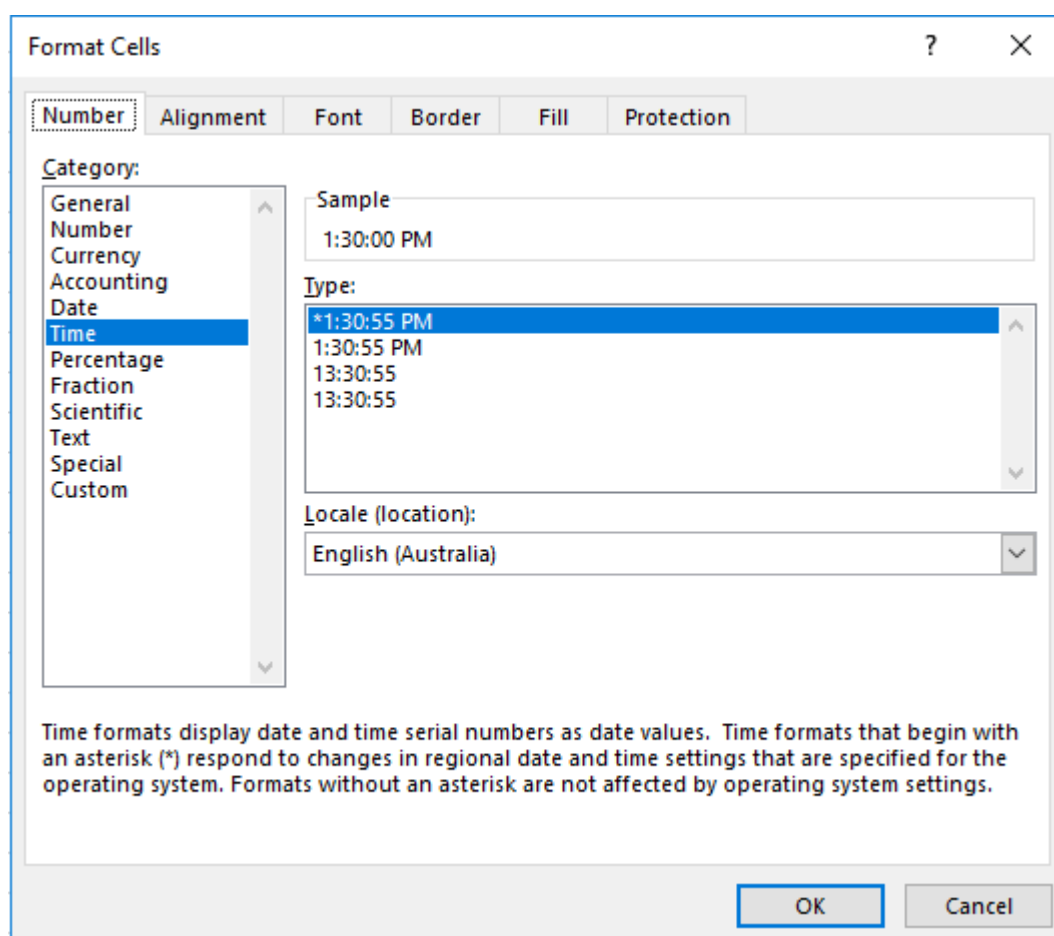
10. No missing IDs
11. If inputting events, then the publication fields should be blank
12. CA field that are not applicable should be blank.

Maintaining your CPD Activities.

CPD activities can be edited once they have been uploaded to the CPD management system. You can edit and delete any records.

From **The Hub,** click on:

Provider Edit
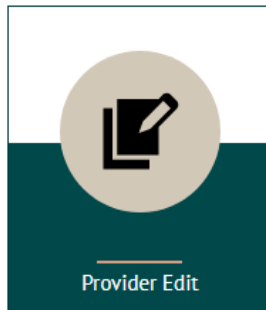
Searching

Ensure you are searching for the correct provider you are managing. Use the drop down arrow to change providers.

I am operating on behalf of:

Legal Practice Board

Use the **Search Activity** to search for an activity. You can search on any of the criteria presented to you. Below is a description of the criteria. search criteria available to you.

Practitioner ID	If you know the ID of a practitioner you are searching, you can enter this here.
First name	The first name of the practitioner.
Last Name	The last name of the practitioner.
Activity Type	Indicates whether or not you are searching for an event or a publication.
Event ID	The specific ID of an event.
Event Name	Search on any part of the name of the event.
Event Start Date	The date the event was held. The date can be entered using the date picker icon to select the date or by typing the date directly into the search field.
Event End Date	Use this field together wih the **event start date** to include a date range of when an events were held.

Search Activity

Practitioner ID

[   ]

First Name

[   ]

Last Name

[   ]

Activity Type

[Event   ⌄]

Event ID

[   ]

Event Name

[   ]

Event Start Date

[26/02/1974   ✕   📅]

Event End Date

[26/02/2024   ✕   📅]

[Submit ＞]

Search Results

Search results will look like the below.

CORO - Opening Keynote: Legal regulation in a changing world	
8 Nov 2021 Name: Russell Daily SEQN: 24268 Points: CA2: 0.5	✎
CORO - Opening Keynote: Legal regulation in a changing world	
8 Nov 2021 Name: Elizabeth Fulham SEQN: 24269 Points: CA2: 0.5	✎

Lick on the edit icon on the right of the record to edit the line.

Editing a record

1.   Using the search facility narrow your search to the record(s) you want to view or edit
2.   Locate the record within the returned activities
3.   click on edit icon on the right of the record to edit the line.

4.   Edit the fields required
5.   Click Submit

Deleting a record

You may need to delete records if the same record was contained multiple times in the same upload spreadsheet or you wish to re-upload the records again.

1. Using the search facility narrow your search to the record(s) you want to view or edit
2. Locate the record within the returned activities
3. At the end of the record on the right click on the view or edit link
4. Find the field Request for Deletion. Please select a reason.
5. Enter a reason from the drop down
6. Save & Close