

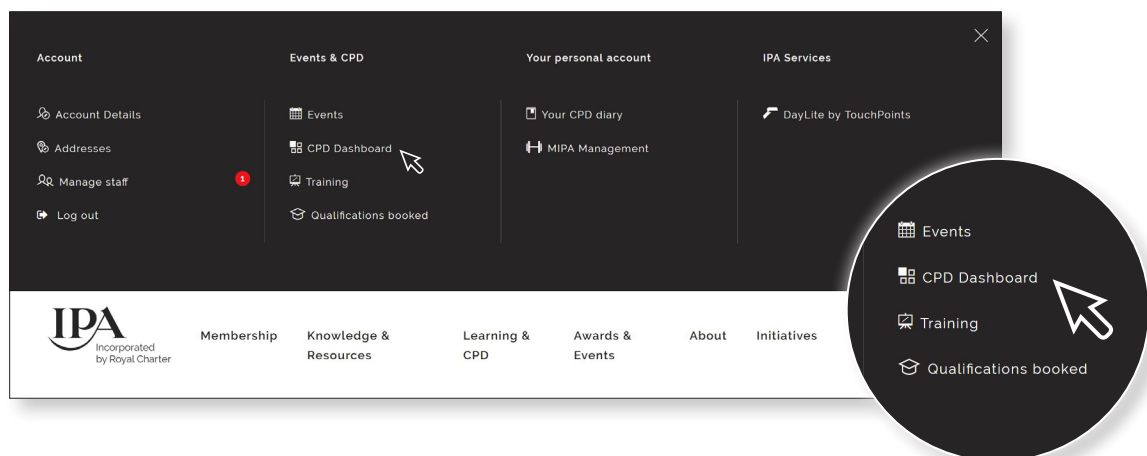
# A guide to the IPA CPD Dashboard

If you do not have CPD manager access but need to monitor your agency's CPD progress, and to book training, please email [sarahv@ipa.co.uk](mailto:sarahv@ipa.co.uk)

Go to [www.ipa.co.uk](http://www.ipa.co.uk) and click on the 'Profile' silhouette in the top right hand corner.

CPD Managers have three additional resources available, under Account 'Manage staff', and under Events & CPD, 'CPD Dashboard' and 'Qualifications booked'.

## CPD Dashboard



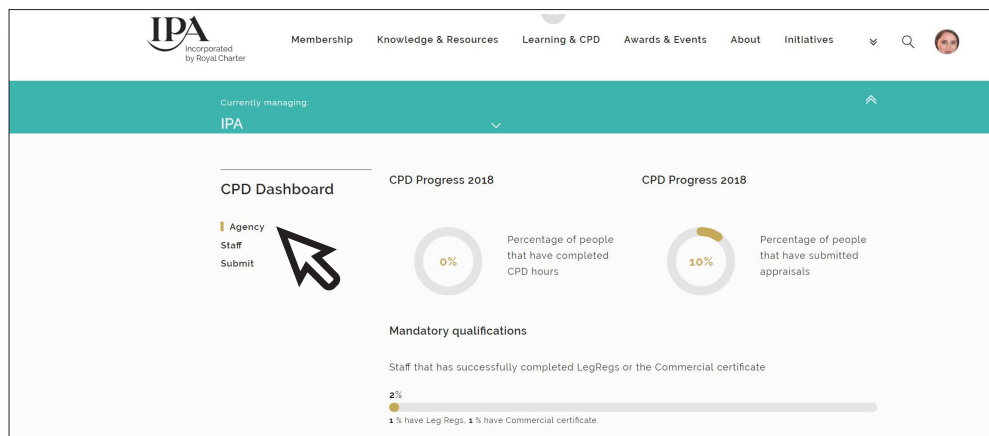
Use the Dashboard to monitor your agency's CPD progress, view individual diaries, and make your annual submission for CPD Accreditation. You can also remove users when they leave the company, you'll need to do this as soon as they've left, do not wait until the end of the year.

## Agency

These wheels will show you the percentage of users who have completed their CPD diaries, and recorded their appraisal.

The bar below shows you what percentage of users have taken the IPA LegRegs and Commercial certificates.

"Download spreadsheet" will create an excel spreadsheet for you, a detailed breakdown of the agency's CPD progress.



## Staff

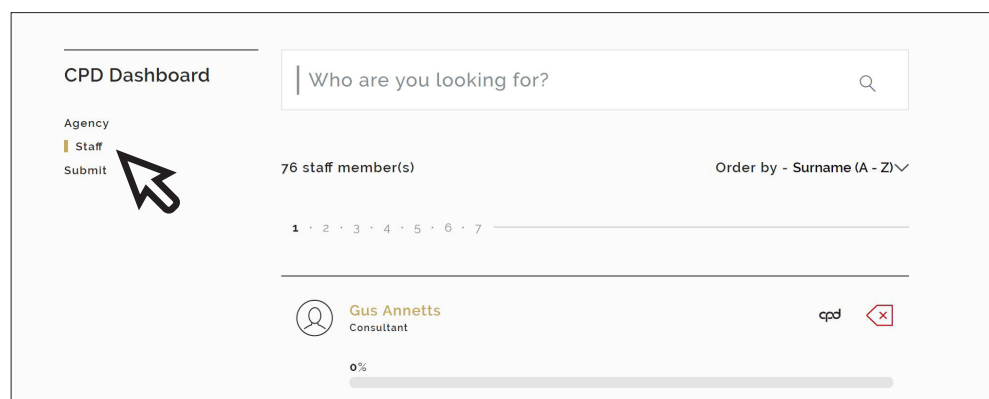
You can see individual progress on this page. The progress bar will show the percentage completion of required hours.

A green tick or red cross indicates whether a person has completed LegRegs, the Commercial Certificate and their appraisal.

Their start date is also shown.

Click their name or the CPD icon to go to their CPD diary, where you can view and add entries.

Click the red X icon to remove the user from the agency.



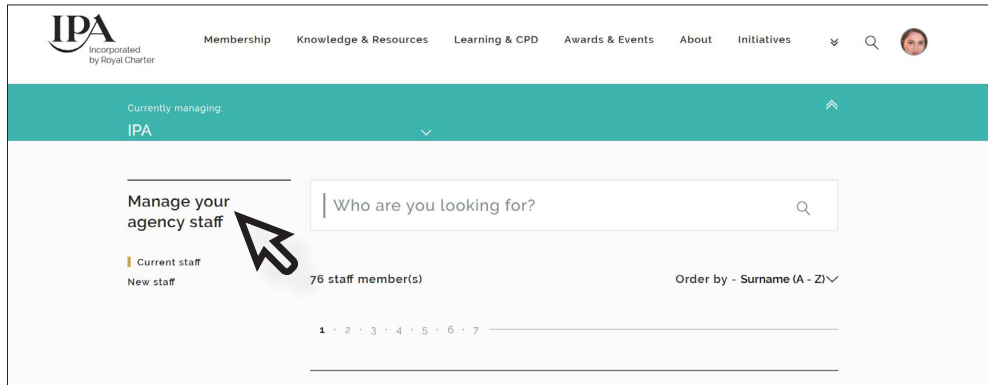
## Submit

Here you will make your annual submission for CPD Accreditation, due by the 31st January every year, by uploading your Strategic Development plan and completing the declaration confirming the criteria is in place.

# Manage staff

## Current staff

Use this area to keep the list of users at your agency up to date and edit profiles. Here you will see a list of everyone who has an IPA.co.uk account connected to your company.



Click the red X icon to remove the user from the agency.

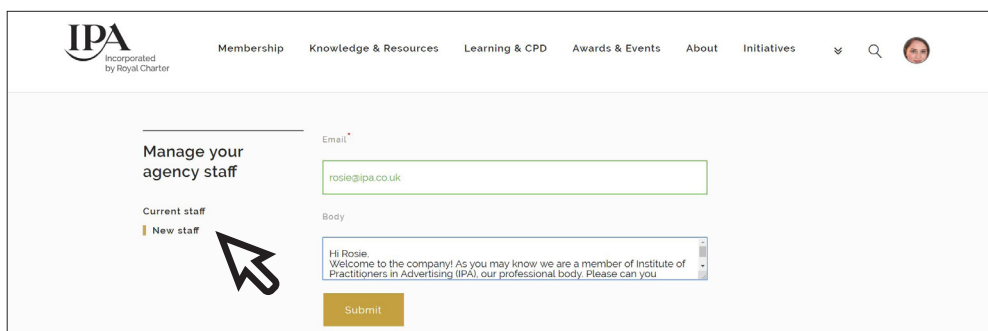
Click the 'Profile' silhouette to go to their profile, and the pencil icon to make edits. Only the individual can edit personal information – name, title etc. You can edit their job title, start date and working hours.

Please contact the IPA if anyone at the company is absent for an extended period, e.g. parental leave, long term sick, sabbatical etc.

## New staff

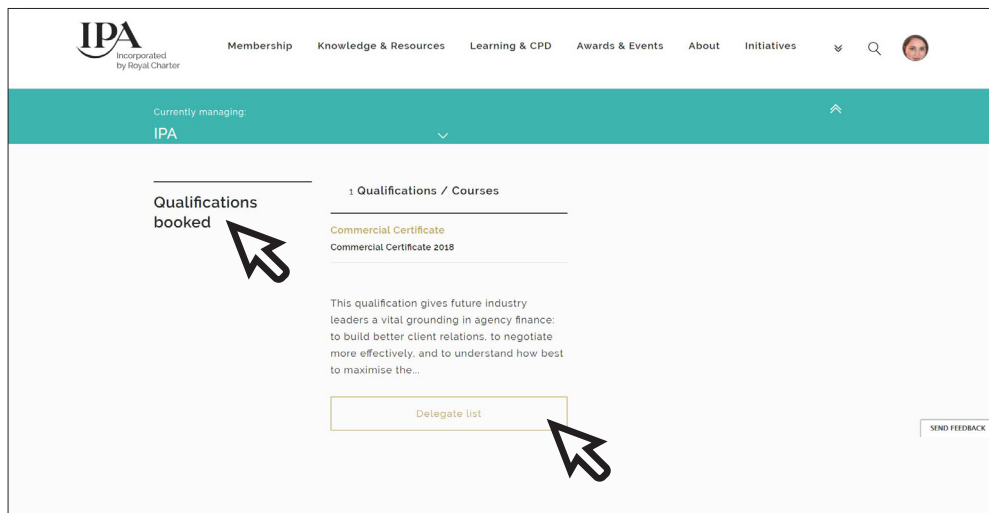
Enter your new joiners email address, and an optional personalised message, and they will be sent an email with a registration link, inviting them to sign up to the IPA website.

If you have a new joiner who has an existing account on the IPA website, they can transfer their account to your company by logging in, going to 'Account details' and clicking 'Moved jobs'.



## Qualifications Booked and Events

Here you can keep track of online learning, courses and events that you have booked on behalf of your colleagues. Your colleagues will find access to training they're booked onto by clicking on their Profile then "Training"



### Delegate list

Here you'll see a list of all the people you have booked onto a specific qualification, course or event.

When booking, you will have had the option of booking places without assigning the name of a person. Here you can assign an attendee or participant to the training or event.

### Questions

If you have any questions, concerns, or technical difficulty, please contact the IPA team

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