

Guidance for PBSGL Facilitators & Co-Facilitators

New Website

Website address for CPD Connect incorporating PBSGL is:

www.cpdconnect.nhs.scot

1. Logging in to CPD Connect website
 - The login button is at the top right hand side of the website
 - You should use your normal PBSGL user name and password to login to the site
 - **Please see guidance on page 3 about linking PBSGL to your Portal and SOAR accounts**
2. Navigating to PBSGL
 - Once logged in you will remain on the CPD Connect Home page, you will see at the top right hand side of the screen that you are logged in
 - Click on the PBSGL tab and this will take you to the PBSGL page. You will see that the PBSGL page has a menu on the left hand side
3. Accessing Modules
 - Click on 'PBSGL Modules' from the menu
 - Search / scroll the list of modules
 - Click View/Join to access the full module (please note that if you haven't logged into the website from the home page the system will prompt you to log in at this point)
 - **Co-Facilitators Only** - If you are unable to access the modules this may mean that your annual fee is outstanding and so your website access has expired. It is now possible to renew your membership through the website. Once logged into the website there will be a message displayed on the PBSGL page below the picture and welcome message which will look like this:

Membership

Your membership of PBSGL expires on 28 February 2016

> [CONNECT WITH PORTAL TO RENEW](#)

When you click the 'CONNECT WITH PORTAL TO RENEW' button you will be prompted to login to the website again, but on this occasion you should login using your **Portal login details**. Once you do this you will see that at the top right hand side of the screen that you now have a basket which should contain your annual membership fee. You should click

on the basket and follow the payment prompts until you complete your payment. Once we have confirmed receipt of your payment your website access will be reactivated.

- If you do not have website access and your annual membership fee is up to date then please contact the PBSGL Administrators at pbsgladministrator@nes.scot.nhs.uk.

4. Managing Your Group(s)

- Click on the group code, which you will find on the PBSGL page under 'My Group(s)/Membership' on the left hand side of screen (if you are involved in multiple groups a list of all of your group codes will appear here)
- From here you can email your active* members to send meeting reminders (or anything else you may wish to communicate to them)
- A list of your active* members will appear on this page. You can select all members or certain members by ticking the appropriate boxes. You can also have the emails copied to yourself.
- Please note that all active* members have their own login details for the website and there is no requirement for you to send the module to them in advance of a meeting and they can access the modules themselves. You could use the meeting reminder function on the new website to let active* members know which module you will be discussing at your next meeting.

5. Log sheets

- Once within your group page there is a section called Log Sheets Administration
- From here you can click to Add a New Log sheet electronically
- From here you can also view, edit, delete existing log sheets
- There is no requirement for you to email the log sheets to your group members. All active* group members have their own login details for the website, when you complete a log sheet and select the members who attended the meeting and click the 'save log sheet' button, the members own 'my group(s) / membership' page on the website will automatically populate with the log sheet, and the members can upload the log sheet from the website to SOAR.
- You could use the meeting reminder function on the new website to email the active* members to let them know when you have added a log sheet.
- Please note that the log sheet will timeout after 60 minutes if you haven't clicked the 'save log sheet' button, and if this happens the contents of your log sheet may be lost.

6. Other Tools to Manage Your Group

- Show on Site – if you tick this box it allows the system to display your group in the map search facility on the website.
- Highlight this Group – if you tick this box it will be highlighted to prospective new members that you are looking to expand your group.

7. Linkage to SOAR

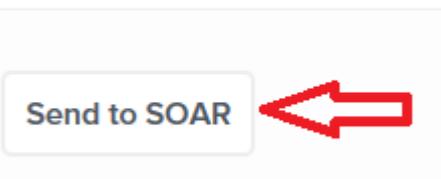
- The website has the unique function of allowing direct upload of your PBSGL log sheets to SOAR
- Once you are logged into the new website with your PBSGL login details, if you click on the 'Connect to SOAR' button which should be just above where it says 'Your Group(s) / Membership' on the PBSGL page as follows:

> Connect To SOAR 

MY GROUP(S)/MEMBERSHIP

> EU02

- This will prompt you to login to SOAR and once you have done that your PBSGL and SOAR accounts will be linked, and thereafter when you are in your group page, the log sheet options will include a new one called 'Send to Soar' as follows:



- And once you click 'Send to SOAR' you have to complete a short CPD form and then you would click 'Save to SOAR'.
8. New Member Requests
- The website will allow prospective new members to view groups in their local area and to fill out an electronic request form to join the group. If this form is completed in relation to your own group, it will be sent to the PBSGL Administrator and the PBSGL Administrator will get in touch with the members' details and you would get in touch directly with the member with details of your group meetings i.e. venue, timing etc. Members would not be allowed to join the group without your agreement so there would be a discussion around whether this is possible once the application is received.

*Active members are members who are up to date with their annual PBSGL fees. If a member is not listed in your group management page this is often because their annual fees have expired. The PBSGL Administrators take full responsibility for liaising with the member regarding payment, but may contact you to check that the person is still part of your group and that we have the correct email address for the member. Once members have settled outstanding fees they will appear on your group list, and at that time you will be able to edit and add that member to log sheets, so they won't miss out on any log sheets for meetings that they have attended.

Linking Portal & PBSGL Logins

Portal and PBSGL have their own distinct login mechanisms. Without rewriting both of these systems it has been necessary to develop a new login mechanism to the CPD Connect website that supports both Portal and PBSGL.

- 1) Existing **PBSGL users**: should be able to login to CPD Connect using their **existing PBSGL login details**. This will allow access the modules.
- 2) Existing **Portal users**: can login to CPD Connect and pay for annual PBSGL membership fees or CPD Connect courses using their **existing Portal login details**.

3) Existing users with **BOTH PBSGL and Portal accounts**: can login in using EITHER login details. However, they can only pay for Portal fees / courses ONCE they have logged in with their Portal account details - and - they can only access PBSGL modules ONCE they have logged in with their PBSGL account details. So, a user visiting the site for the first time may be prompted to login twice, once for Portal, and once for PBSGL. After that has been done successfully, they can login with either account details and pay for Portal courses AND access PBSGL modules.

4) **New/future users**: will require to go through a similar process, e.g. in order to access PBSGL modules they must login using PBSGL details - and - paying for Portal courses will require a Portal login. Suggestion: new PBSGL users should register for PBSGL with their Portal login details, and vice versa.

5) **SOAR users**: SOAR users are only required to provide SOAR login details once when they attempt to send CPD information from CPD Connect to SOAR.