Pharma Continuing Education

USER REFERENCE GUIDE

VERSION 7.5



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Signing into Applicant Tracker

Self Registration

Please visit: https://bit.ly/2VuHXEu

Login Sign In to your account	Pharma Continuing Education
Usemame Password	Submit Continuing Education Courses
Login	Forgot password? Self Register

Navigate to the Applicant Tracker home page on your computer, tablet, or mobile device to sign in.

- Click on Self Register
- Enter all fields that have a red asterisk in order to successfully create an account.
- Click the Create button
- A notification will then appear that the account is being reviewed. The administrators will then need to review and either approve or reject the account.
- Once approved by the administrator an email notification will be triggered back to you to verify the account.
- After account confirmation, you can navigate to the Applicant Tracker site and enter your Username and Password to successfully login.



Create an account	
Back to Login	
Email 苯	
Password 🗰	
Confirm password 🌞	
First Name 🗰	
Last Name 🗰	
Job Title 苯	
Phone Number 🛊	
Educational Provider Organization Name *	
	Create
Your account is being review	red. Please check your email for further instructions.
	Return to Login
Confirm Your CDPH Pharmaceutic	cal Representative Education Account
CDPH Pharmaceutical Representative	e Education Administration <no-reply(<math="">\bigcirc \bigcirc \rightarrow</no-reply(>
To azakhodin+91@immuware.com	Thu 3:22 PM
	y, Outlook prevented automatic download of some pictures in this message.
Dear Test AZ,	
Please confirm your CDPH Pharmaceutical Represe	ntative Education account by clicking this <u>link</u> .
Thank you,	
CDPH Pharmaceutical Representative Education Te	am

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Forgot Password

If you forget your password, you can reset it from the Applicant Tracker login page.

- Click the Forgot Password link.
- On the Forgot Password page, enter your Applicant Tracker username.
- Click the **Email Link** button.
- You will receive an email with instructions for resetting your password (the link to reset does expire 24 hours from the time received).
- If you continue to experience login issues, contact your organization's point of contact.

	gin n to your account		
4	Usemame		
	Password		
Log	in		Forgot password? Self Register



Changing Your Password

If you know your current password and would like to change it, you can change it from your Applicant Tracker user tools.

- Log into your Applicant Tracker account using the steps shown above.
- Click on the Gears icon in the upper right corner of your screen to access your user tools.
- Select Change Your Password near the bottom of the dropdown menu.
- Enter your current password and your new password.
- Click the **Change Password** button to complete the password change.

Personnel Details

My Profile

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		HEALTHY CHICAGO	Hello John Doe!	4
∕ly Profile				
Application #22 (Test 4) has been app	ealed with comments:		×	
		16	Active	
John Doe APPLICANTS	5/7	Facility: CDPH		
		Educational Provider Organiz School	ation Name: Chicago	
Step 1: Application:		Job Title: Teacher		
		Personnel Type: Applicants		
Select Exisiting Application OF	Start New Application	Email: zakhodin715@gmail.com	n	
Test 4 - Pharmaceutical Co	×	Hire Date: 8/6/2019		
	Name Your Course			

The My Profile page shows a variety of information including:

- Basic information about your account as provided on the self-registration form. The number '29' in the screenshot above is the **Personnel ID** that is system generated. This number is assigned to you once a CDPH administrator has approved your self-registration. You can reference this number should CPDH administrators ever need to quickly access your profile.
- Their ratio of Compliant records to Not Compliant records that are required to be completed. This information is represented numerically and graphically as a pie chart, where green wedges represent Compliant records and red wedges represent Not Compliant records.
- **Step 1: Application** allows you to Start and Name a new Application or select an existing Application to view details.
- The **Existing Application** section shows all the applications that have been created. In order to view the records that coincide with a specific application, you can simply click anywhere within the application row and it will populate all the records associated with that application.
- The **Record History** section shows an overview of all records submitted and is grouped by record type. Click on any record to open the Record Details page to see more information.
- Use the **Show Historical Records** toggle to show or hide expired records. Setting the toggle to the "on" position shows all records, including those that have expired. The toggle button is automated to be "on" within site.
- You can **Print Record History** to print only the record history section view.

	Course	Application Type	Application State	Application State Comment	Date Created	Date Submitted	Date Approved	Application Expiration Date	Action
19	Practice Test	Pharmaceutical Continuing Education	Completed		8/5/2019	8/5/2019	8/5/2019	8/31/2019	
20	Practice Test 2	Pharmaceutical Continuing Education	In Progress		8/5/2019				
21	test 3	Pharmaceutical Continuing Education	Submitted		8/6/2019	8/6/2019			
	ord His	tory - Practice Tes	t					🔒 Print Recor	d History
	Course	Details (Required)							
	Record # Occurrence Date Record Status Status Details				ord Status		State	us Details	
			4210 8/5/2019 Completed Completed						
		8/5/2019		Com	pleted		Com	pleted	
Reco		8/5/2019 r Information (Required)		Com	pleted		Com	pieted	

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Understanding the Icons in Applicant Tracker

lcon	Status	Description
0	Compliant/Complete	This record meets the organization's compliance/approval criteria.
8	In Progress	This record series is in progress and additional steps are required to achieve compliance.
0	Pending Approval	This record is waiting for review and approval by an authorized Approver.
\odot	Submitted	Once all records are Pending Approval, the Application state is Submitted.
\bigcirc	Appealed	The application has been appealed. The applicant can appeal a rejected application up to 3 times.
	Expired	The course has expired.
0	Rejected	An authorized Approver has reviewed this record and has rejected it. Open the record to see why the record was rejected.
Ô	Abandoned	The application has been abandoned. An Approver can Abandon the application.

The following icons are used to graphically represent record series statuses in Applicant Tracker:

Record Submission

Initiate Record Submission

New applications will always need to be created in order to move on Step 2 of the process. All applications are stored within the Existing Application section if you should ever need to access another application that was started/submitted. An **Application ID** is system generated to each application that you begin. This will allow you to keep track of the full application.

Test Test		29 Active
APPLICANTS	5/7	Facility: CDPH Educational Provider Organization Name: Test University
Step 1: Application:		Job Title: Professor
		Personnel Type: Applicants
Select Exisiting Application Of	Start New Application	Email: zakhodin715+75@gmail.com
Test 8.28.19 - Pharmaceuti	÷	Hire Date: 8/14/2019
	Name Your Course	
	Submit	

Select Exisiting Application Test Application 2 - Pharma	OR	Submit	
Step 2: Record For:			
Course Details Record Now			

Enter Record Details

Once the specified application has been selected, you can proceed to **Step 2: Record For** to create the following records:

- Course Details
- Sponsor Information
- Faculty Information
- Evaluation Form
- Certificate of Completion
- Proposed Advertisements/Instructions

All fields with a red asterisk are required in order to proceed. You can easily proceed to the next record by clicking on the **Create Next Record** button at the top right corner of the Confirmation page instead of having to click back to the **Personnel Details** page.

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Applicants can edit their existing records if they haven't already been approved or can print the information.



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Created Date 1014/2019 (214 PM	

Each completed record will also be assigned a system generated **record number**. This number is specific to the record within the application. Once all **7 records** have been completed, the statuses will update to **Pending Approval**. The Application will then be automatically sent to the administrators for review.

Back to Personnel Details		Go to Personnel Summary
Record #4318		Create Next Record
Record Results		
Туре	Course Details	
Record Status	Completed	
Status Details	Completed	
Occurrence Date	8/29/2019	

Appeals and Rejections

Appeals

Applicants can **Appeal** an application up to **3** times. You will then see a banner displayed at the top of your profile with the appeal reason. Information that has been re-submitted will go back to the administrator for review.

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ы	Test Application Name	Application Type	Applicati	on State	Application State C	on went	Date Created	Data Submitted	Data Approved	Application Expiration Data	Action
25	Text 6	Pharmaceutical Continuing Education	Submitte				6/5/2019	8/6/2019			
29	Text 9	Pharmaceutical Continuing Education	Rejected		Insufficient Docume	ntation Provided	8/6/2019	8/6/2019			۰.
30	Text 10	Pharmaceutical Continuing Education	In Progre				6/5/2019				
31	Text 11	Pharmaceutical Continuing Education	In Progra				8/6/0019				
Step	2: Record For:										
Spo	onsor Information	\$		Appea	Application	1	×				
Re	cord Now			Please ente	er your reason for appe	ealing.					
				Docume	ntation has been upda	ted					
Evi	sting Application					Can	cel Appeal				
	sting Application										
Id	Test Application Name	Application Type	Applicat	tion State	Application State	Comment	Date Created	Date Submitted	Date Approved	Application Expiration Date	Action
28	Test 8	Pharmaceutical Continuing Education	Submitte	ed.			8/6/2019	8/6/2019			
29	Test 9	Pharmaceutical Continuing Education	Rejected		Insufficient Docum	entation Provided	8/6/2019	8/6/2019			R.
Λ.	Profile										
		appealed with comments: Documenta	ation has been i	ıpdated							×
						21				Activ	ve
	1	Kevin Test APPLICANTS									
					0 / 0	Facility: CDP Educational		nization Name:	DePaul		
						Job Title: Tea	-				
Ste	p 1: Application:						<pre>/pe: Applicants din715+20@gi</pre>				
	t Exisiting Application		art New Applicati	on		Test Hire Da	-	nan.com			
le	st 11 - Pharmaceutical Continuin		ıme Your Test Apı	lisation Name	÷	Street Addre	ess (Do Not Us	e P.O. Box):			
		Na	ine rour lest App	meation Nam	e						
			Submit								

Rejections

If any records within an application are rejected by the administrator, applicants can view this information on the My Profile page. Applicants will see a banner displayed with the rejection reason. They are then able to re-submit any information within the specific record type(s). Information that has been re-submitted will go back to the administrator for review. The Record Now section only appears when there are still records to be completed within an application. Once all 7 records have been submitted within an application, the Record Now section is no longer visible.

To view specific rejection reasons, you will need to click on the correct Application and then navigate to the appropriate rejected record within that application. You can then click into the record and the rejection reason will be listed in the red banner at the top of the page.

My Profile



Existing Application

Id	Course	Application Type	Application State	Application State Comment	Date Created	Date Submitted	Date Approved	Application Expiration Date	Action
19	Practice Test	Pharmaceutical Continuing Education	Completed		8/5/2019	8/5/2019	8/5/2019	8/31/2019	
20	Practice Test 2	Pharmaceutical Continuing Education	In Progress		8/5/2019				
21	test 3	Pharmaceutical Continuing Education	Submitted		8/6/2019	8/6/2019			

Sponsor Infe	ormation (Required)			
Record #	Occurrence Date	Record Status	Status Details	Actions
4275	8/6/2019	Completed	Completed	
Saculty Info	rmation (Required)			🛓 Documents
Record #	Occurrence Date	Record Status	Status Details	Actions
4276	8/6/2019	Completed	Completed	

Edit Faculty Information

Back to My Profile		
Denial Reason: Incorrect Documentation Provided		
Record #4276		
Туре ≭	Faculty Information	
Record Status ≭	Completed \Rightarrow	
Status Details 🗱	Completed $ eq$	
Occurrence Date 🜟	08/06/2019	
Faculty Name 🗱	Rob	



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Files ≭	Download File
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	Select files
	TestDoc_2019-08-06_18-17-57.d × 11.49 KB X
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Created Date	8/6/2019 6:17 PM
Last Modified By	CarminatiAdministrator
Last Modified Date	8/29/2019 3:31 PM
	Resubmit

Document Repository

Accessing Document Repository

- Use the **Gears Icon** to select the Document Repository
- You will see General Documents that have been uploaded by the administrative team.
- To access the documents, click on either document to begin downloading. Once download is complete, you will be able to view it.
- If accessing the documents on a mobile device or tablet, the document will open once it is clicked on.



Document Repository

General Documents

Biographical and Individual Conflict of Interest Form

Attestation and Conflict of Interest Form for the Continuing Education Provider

