Pharma Continuing Education

USER REFERENCE GUIDE

APPLICANTS

VERSION 7.5

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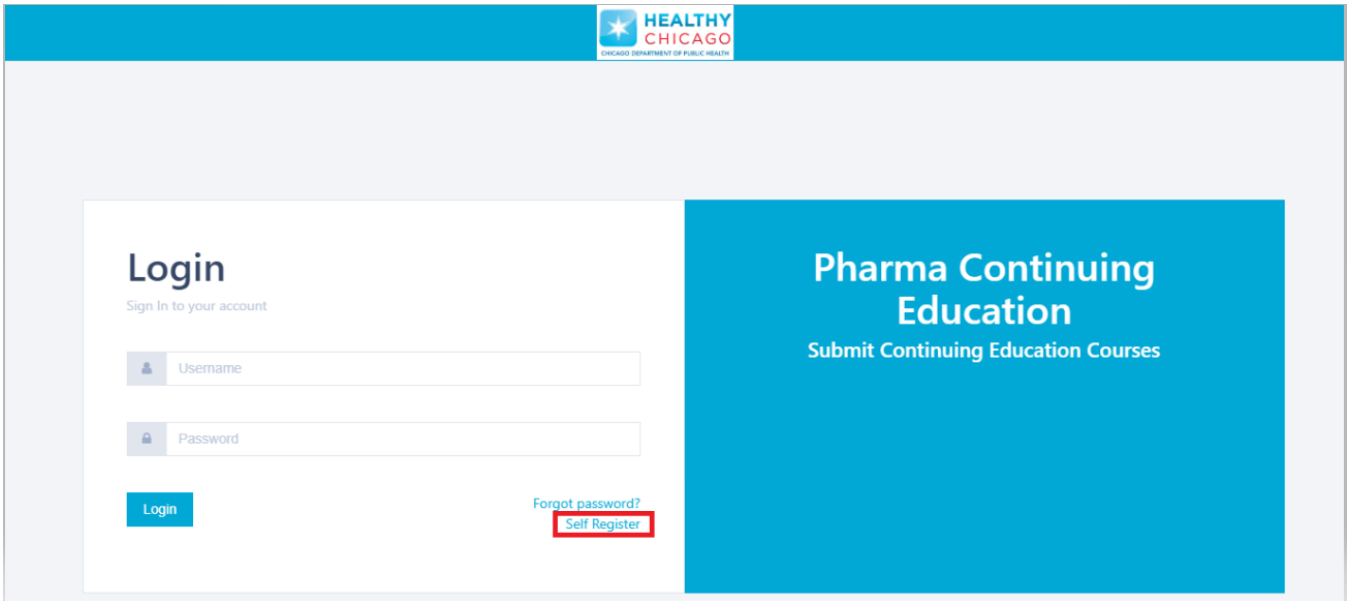
Signing into Applicant Tracker

Self Registration

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



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.

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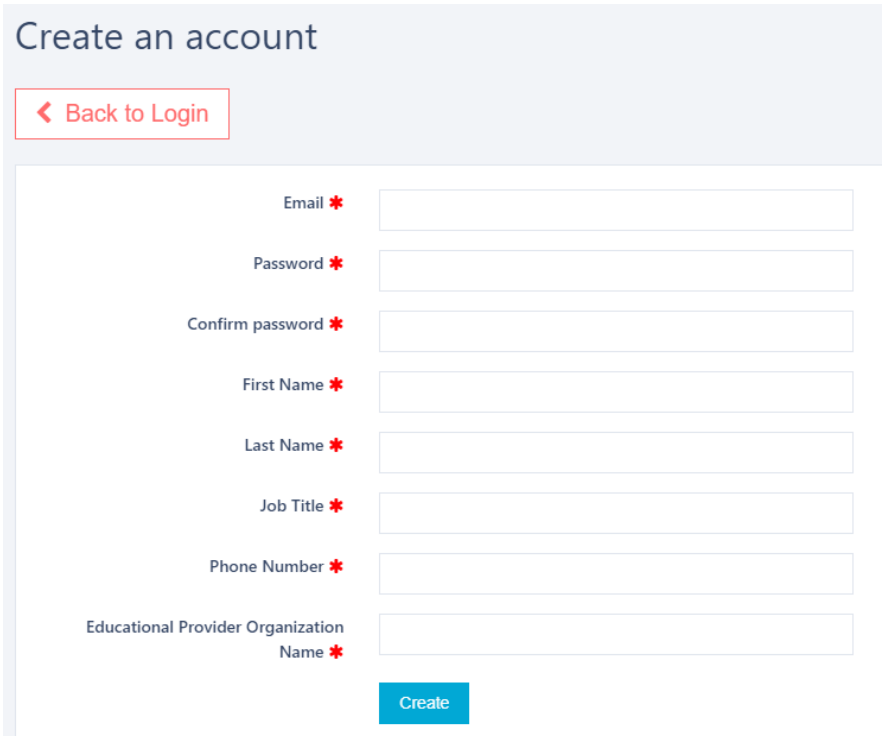

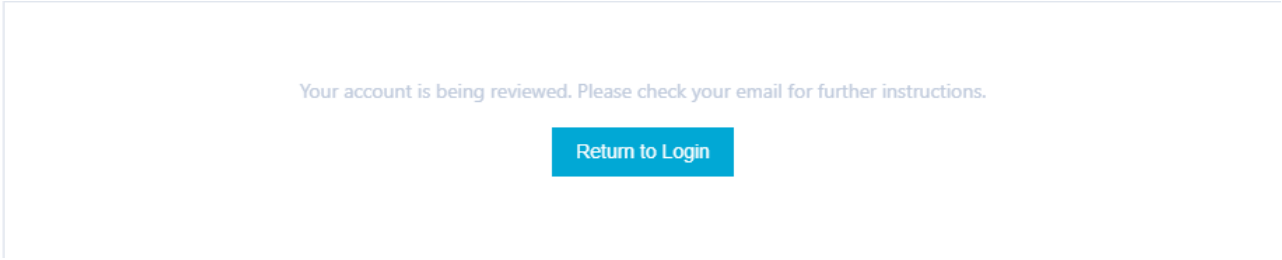

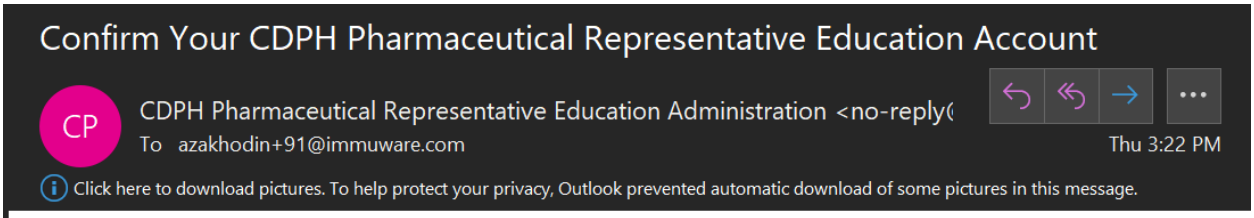

Dear Test AZ,

Please confirm your CDPH Pharmaceutical Representative Education account by clicking this link.

Thank you,

CDPH Pharmaceutical Representative Education Team

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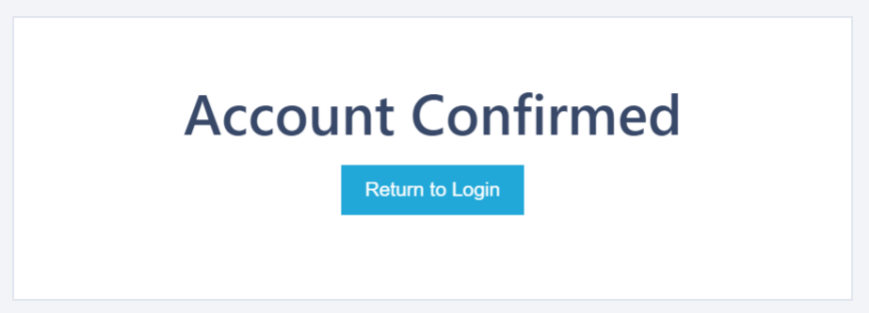
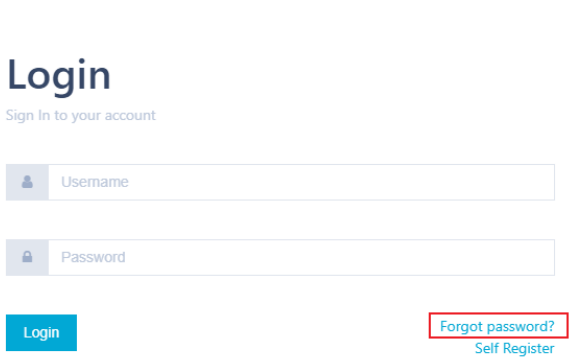


Forgot Password

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.



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.

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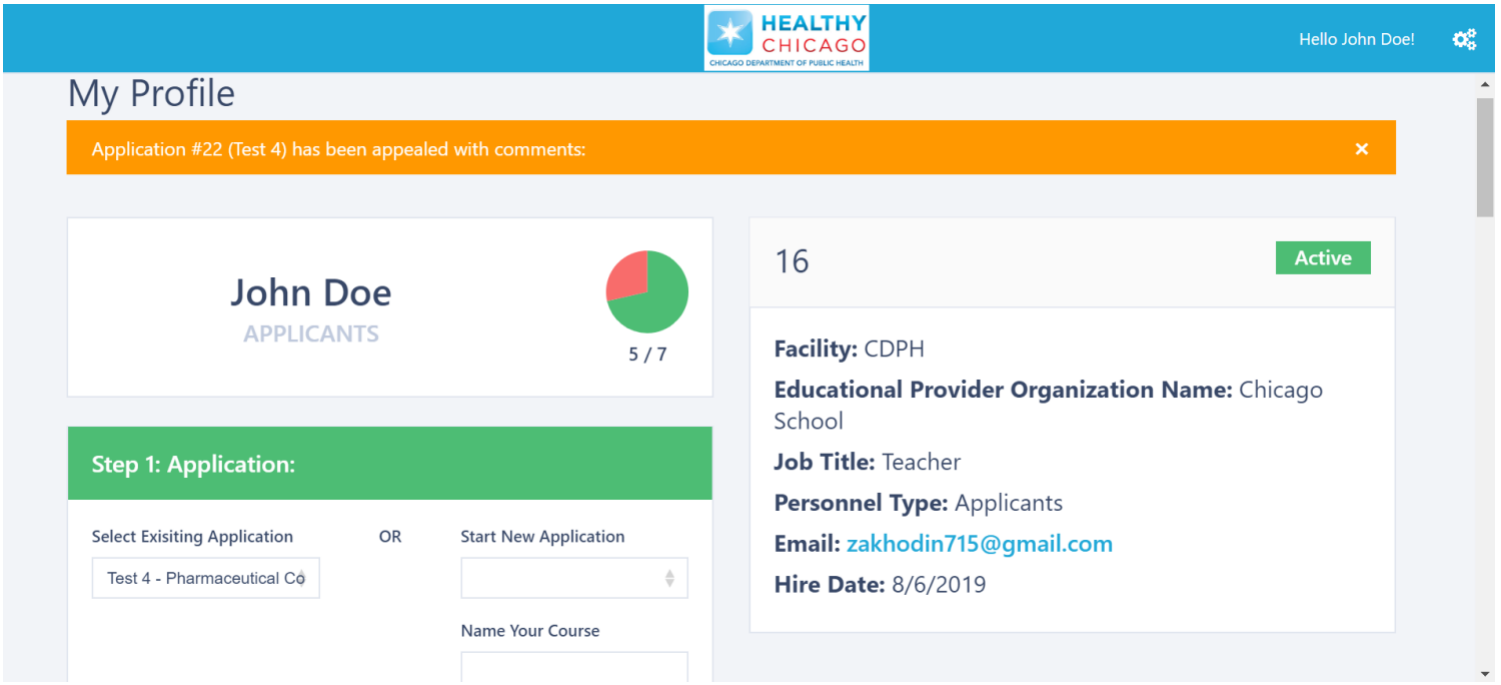
Personnel Details

My Profile



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.

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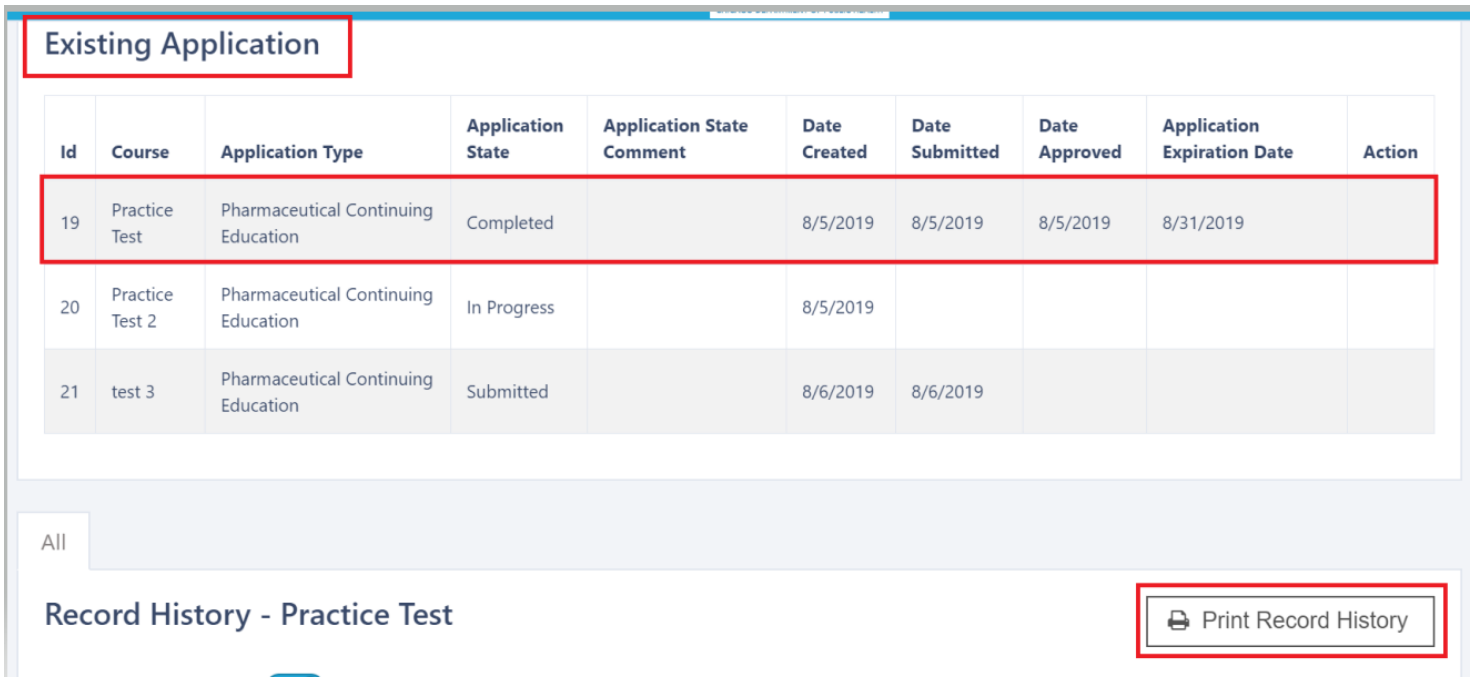

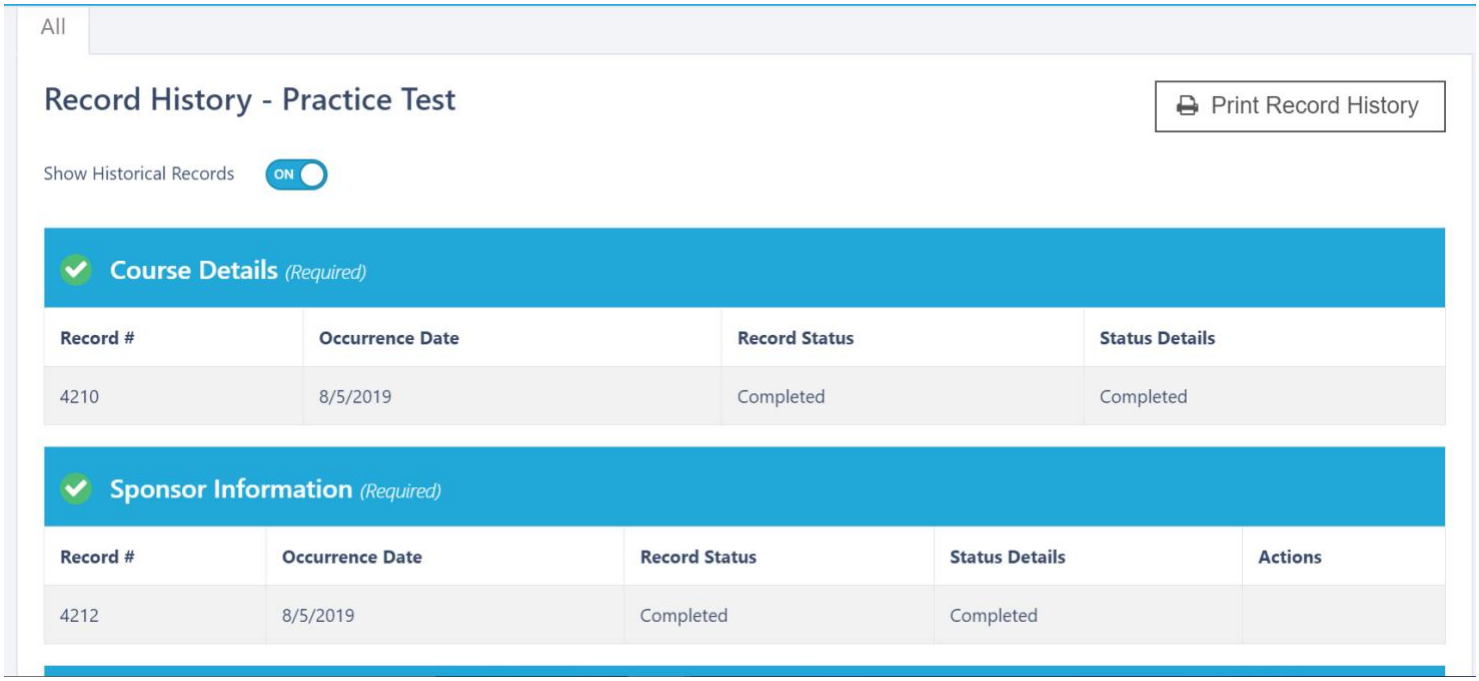

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Understanding the Icons in Applicant Tracker

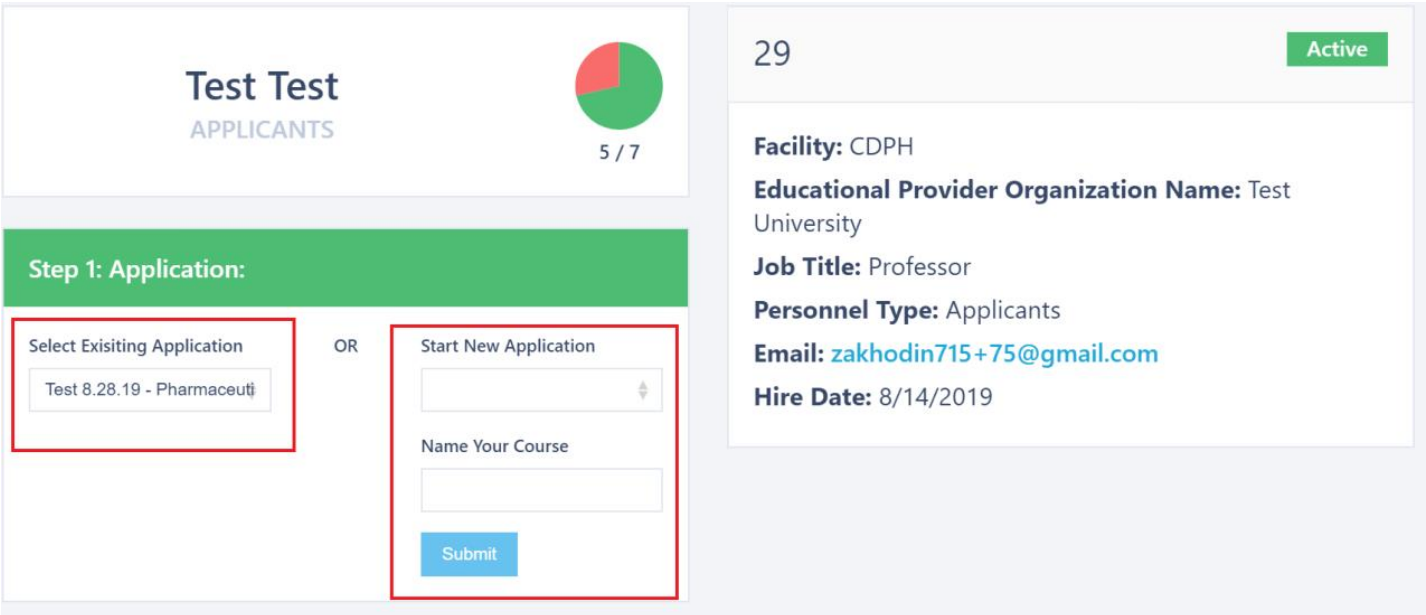
The following icons are used to graphically represent record series statuses in Applicant Tracker:

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

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.



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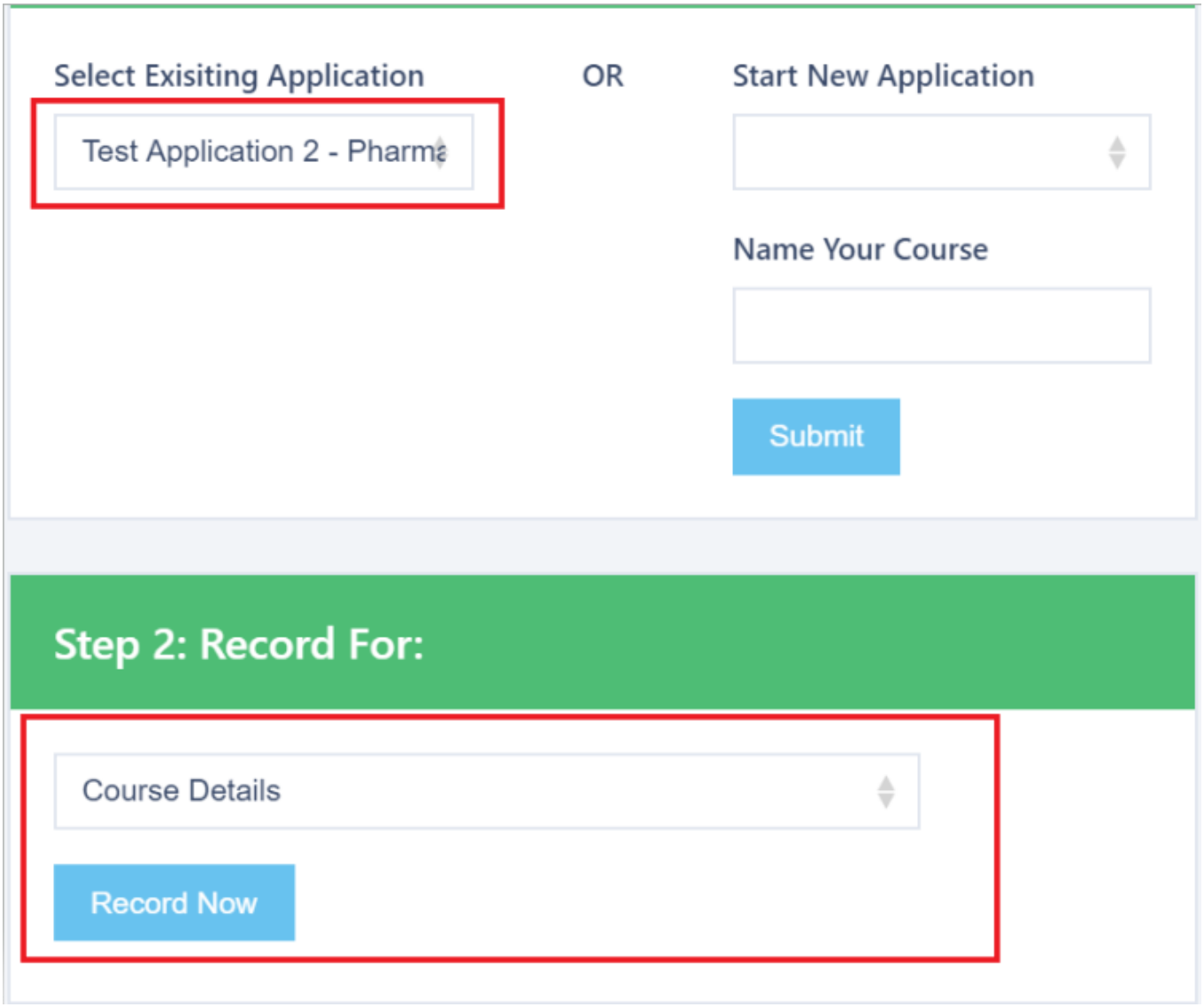

Enter Record Details

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.

immuware

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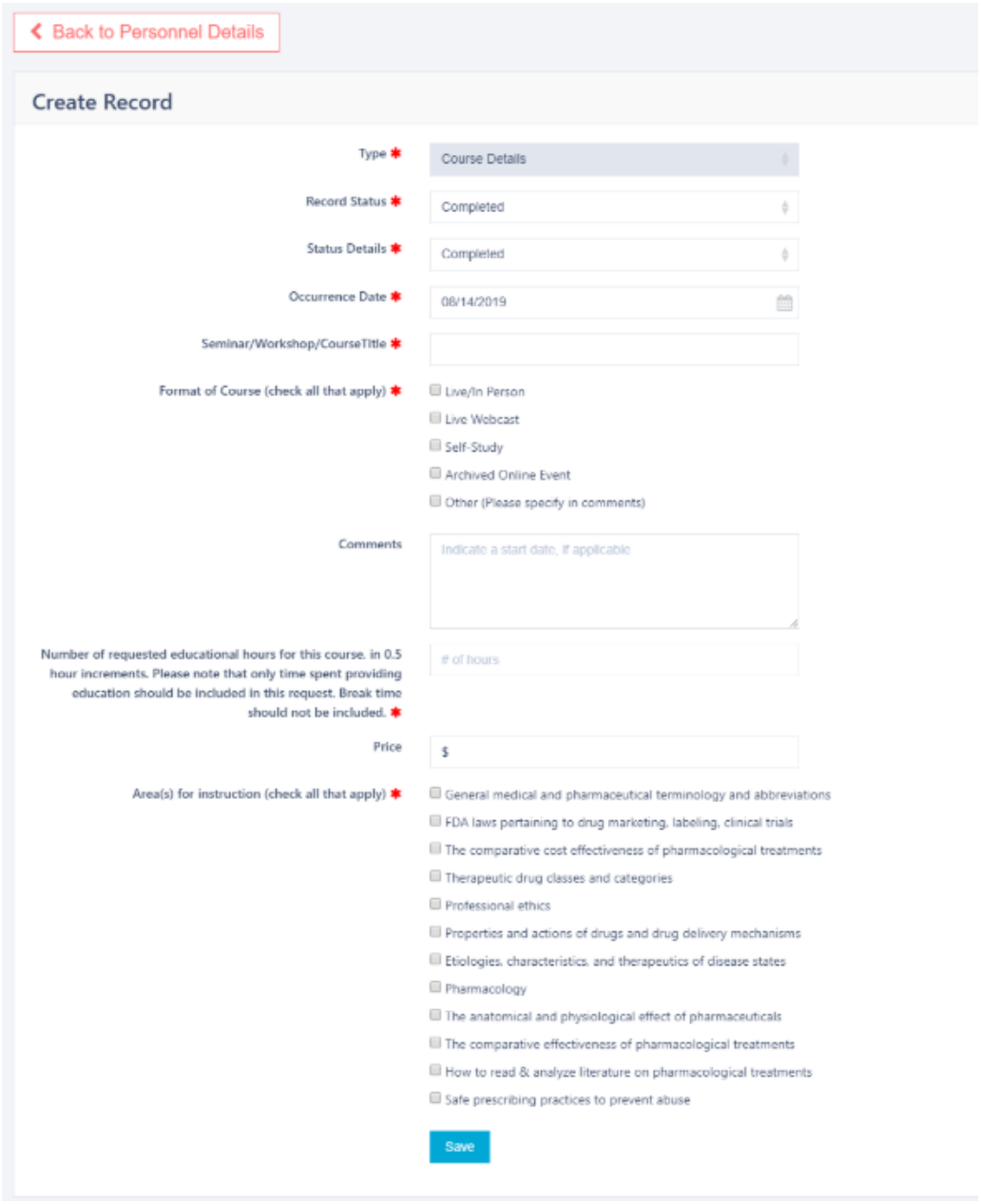
Applicants can edit their existing records if they haven't already been approved or can print the information.



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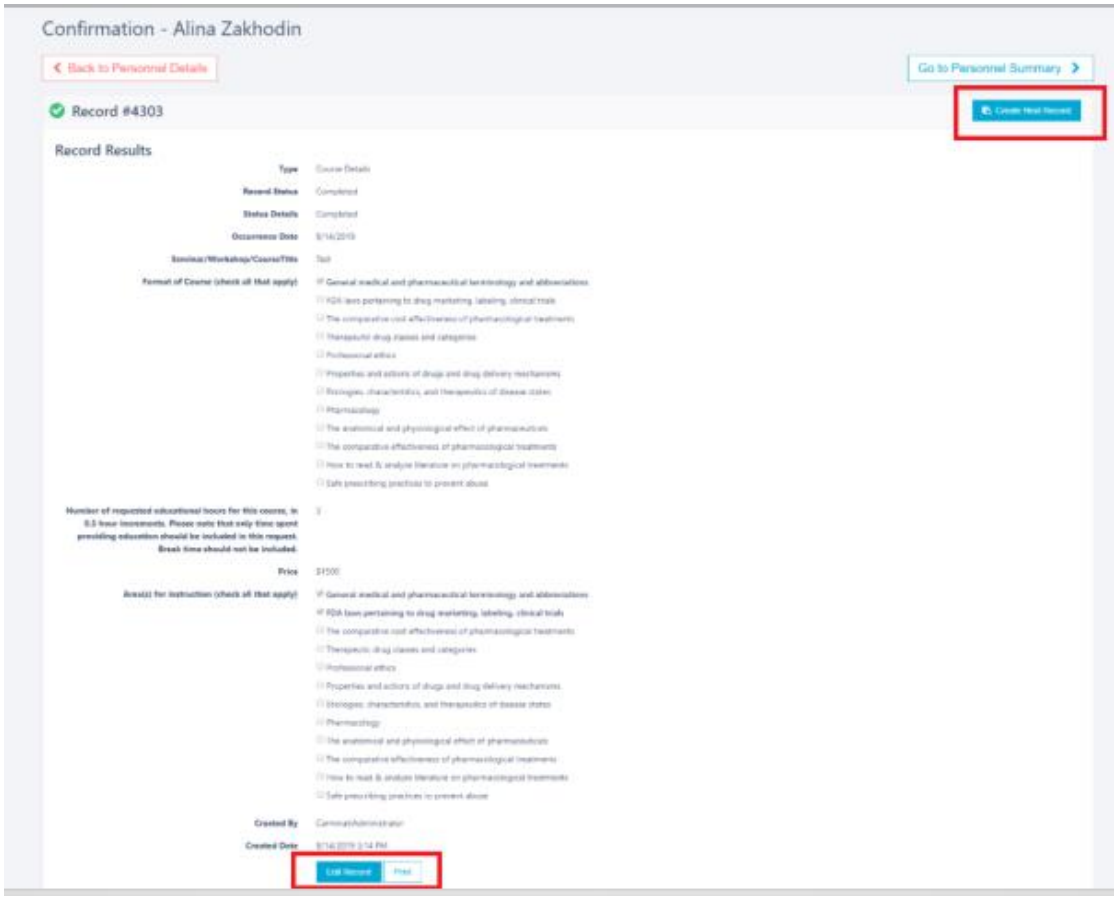
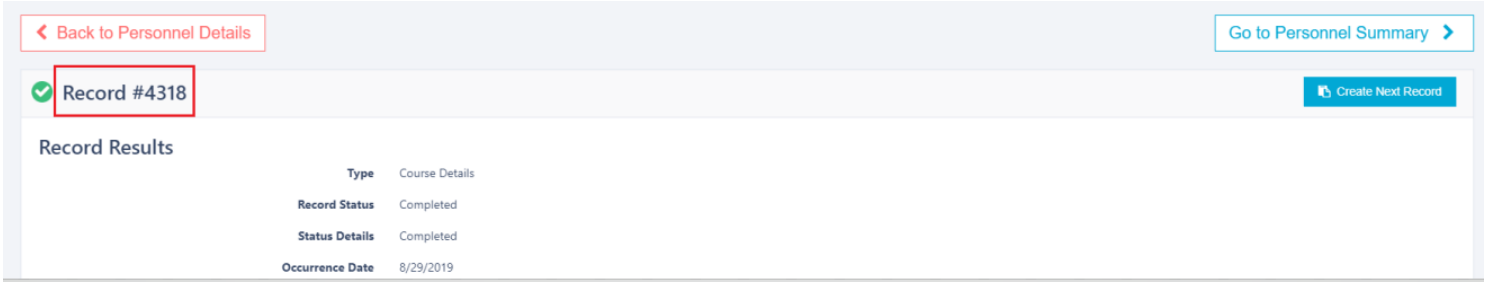


Each completed record will also be assigned a system generated **record number**. This number is specific to the record within the application. Once all **7 records** have been completed, the statuses will update to **Pending Approval**. The Application will then be automatically sent to the administrators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



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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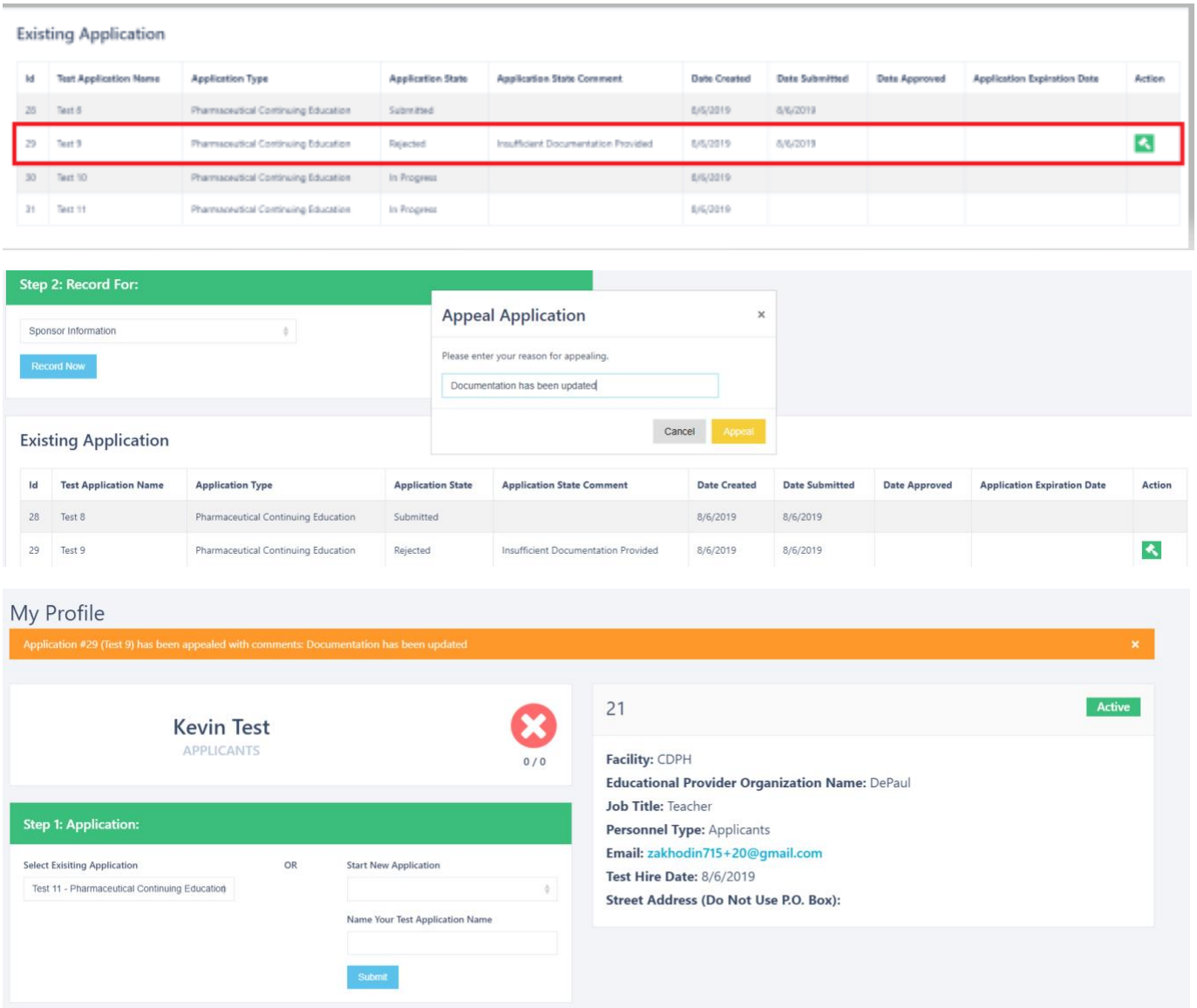

Rejections

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.

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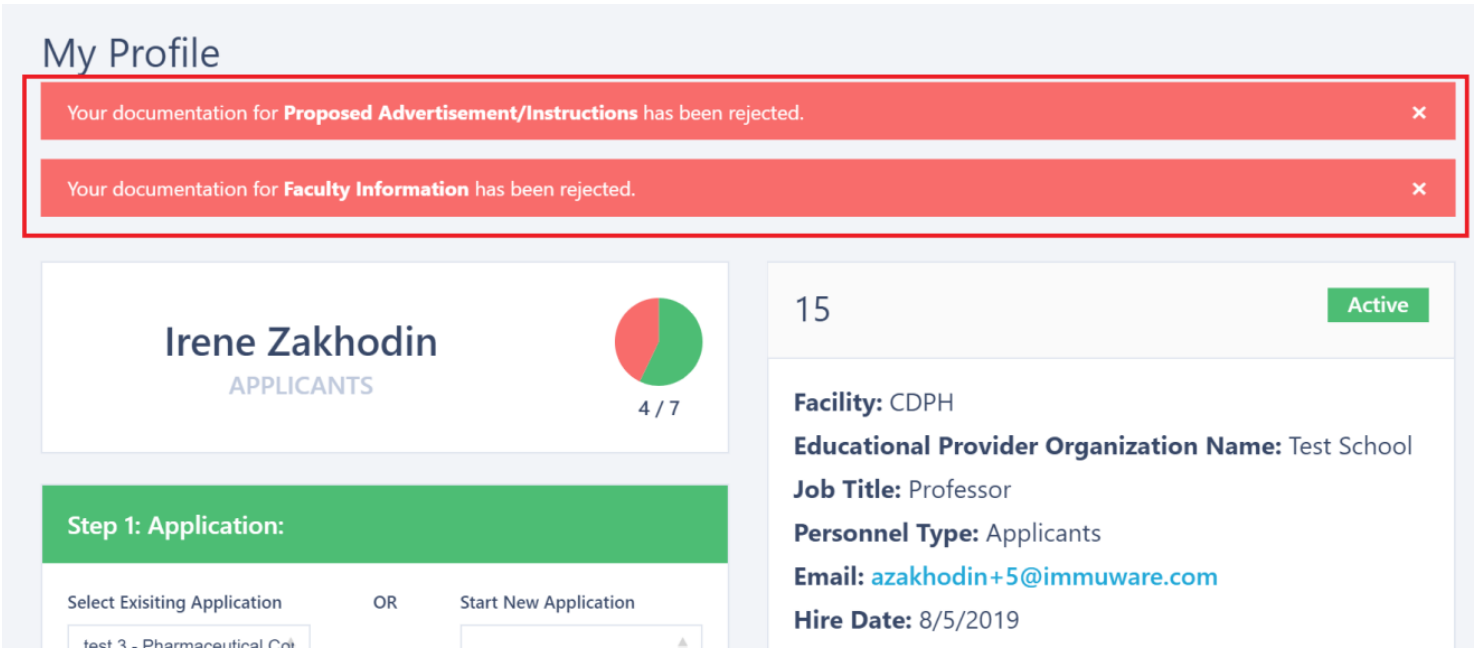

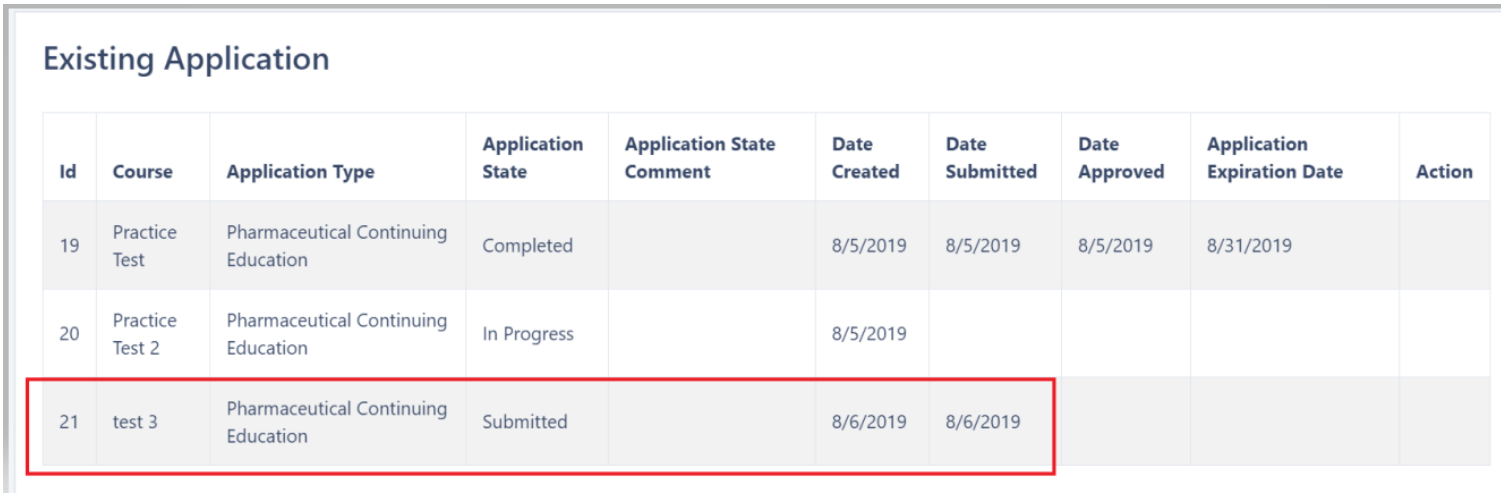

Id	Course	Application Type	Application State	Application State Comment	Date Created	Date Submitted	Date Approved	Application Expiration Date	Action
19	Practice Test	Pharmaceutical Continuing Education	Completed		8/5/2019	8/5/2019	8/5/2019	8/31/2019	
20	Practice Test 2	Pharmaceutical Continuing Education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

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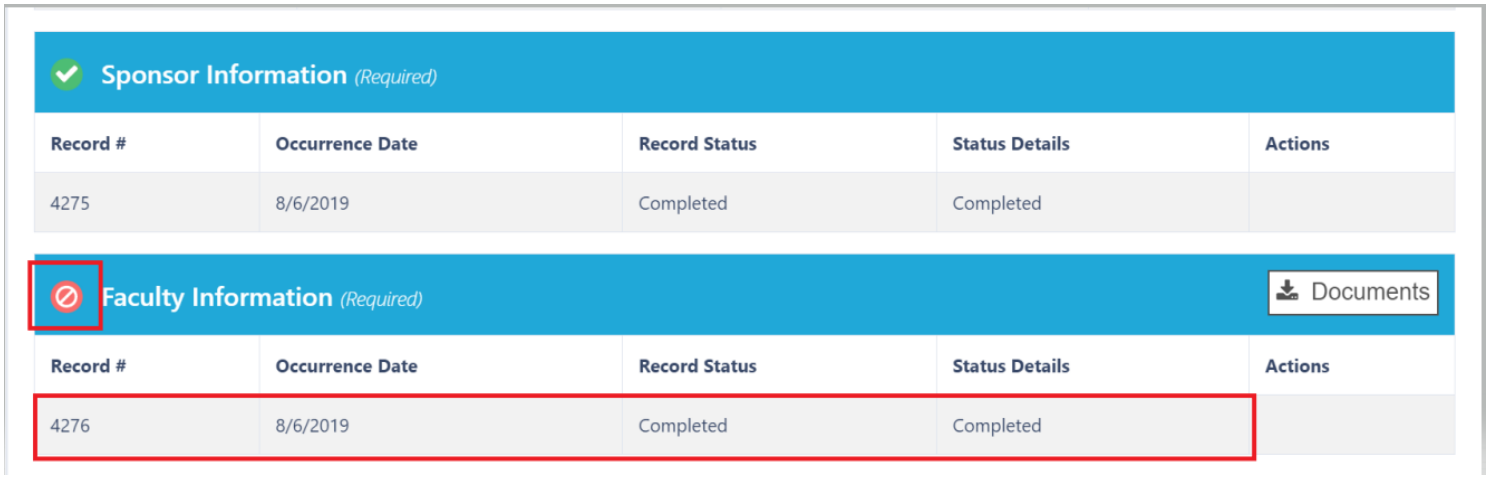

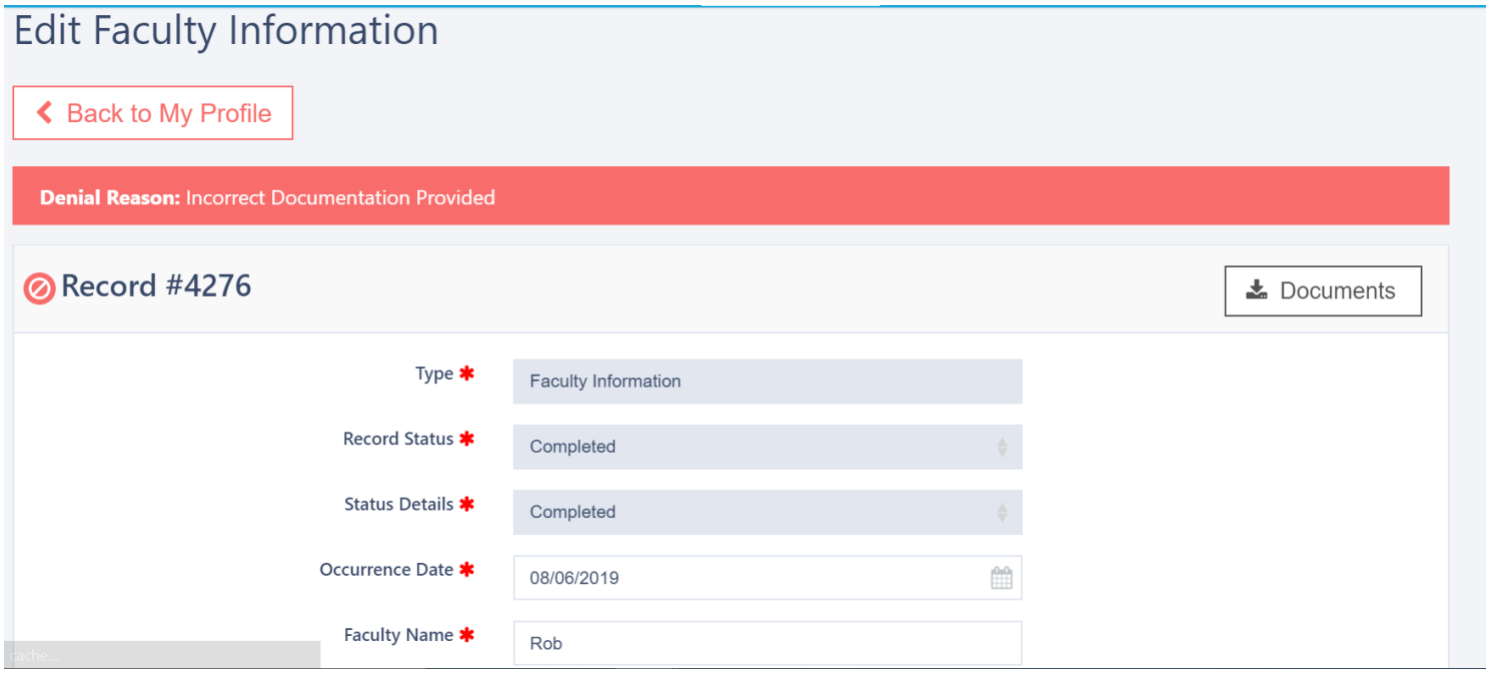

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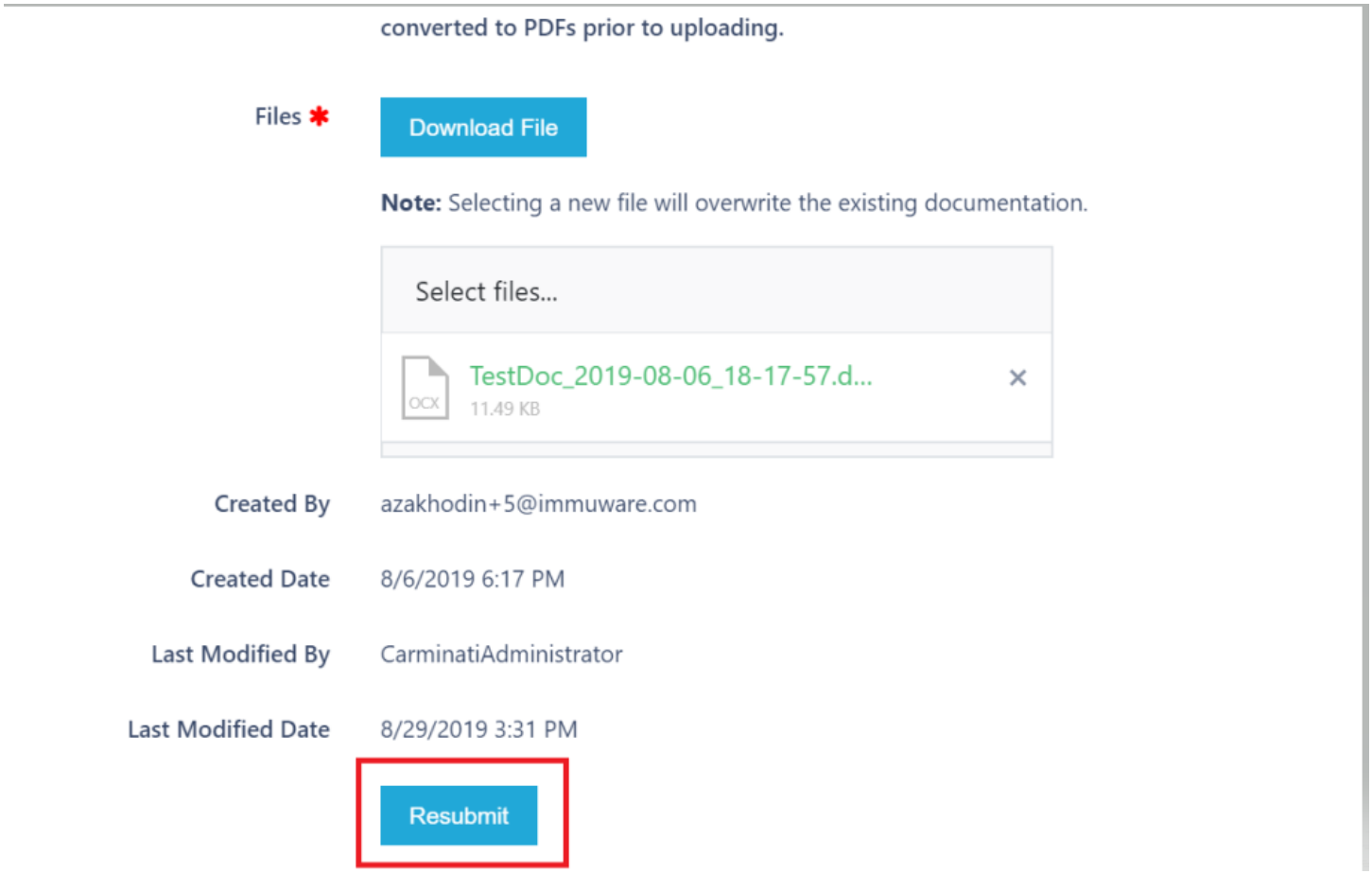

Document Repository

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.

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Document Repository

General Documents

Biographical and Individual Conflict of Interest Form

Attestation and Conflict of Interest Form for the Continuing Education Provider

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