A Guide to Using CERT+
We strongly advise that providers review the guide before beginning a Mainpro+ certification application.

You can find the guide at https://www.cfpc.ca/en/education-professional-development/cpd-program-certification/cpd-program-certification
Create a CERT+ Provider Account

- Go to https://certplus.cfpc.ca/login and select Click here to register.
Create a CERT+ Provider Account

• Complete the required (*) fields

**Note:** Only the registrant will have access to the account. You can grant access to an application for additional users through the Change Manager button.

**TIP:** Ensure the email you choose is one you use regularly.
Create a CERT+ Provider Account (cont’d)

- Create a **Username** and **Password**
- Select a **Security Question** and provide the **Security Answer**
- Review the Terms of Service, select **I Agree**, and then click **Continue**
Create a New Program Application

- Log into your CERT+ account at https://certplus.cfpc.ca/login
Create a New Program Application (cont’d)

- Select the appropriate Role: **Provider**

**Notes**

- Account holders may have more than one role and need to ensure they are entering the correct area (e.g., a planning committee member may also have a provider role)
- Providers must select the Provider role to create a new application or change/edit an existing application
Create a New Program Application (cont’d)

• Click ENTER NEW APPLICATION
Create a New Program Application (cont’d)

- Select **A brand New Application** and click **CONTINUE**

**TIP:** If you are resubmitting an application for recertification you can choose **Copy from a previous program** and select the program title from the drop-down menu. The application will populate fields based on the previous submission.
Create a New Program Application (cont’d)

- Complete each application section

**TIP:** The Program Start Date must be a \textit{minimum of six weeks} prior to program commencement.

**TIP:** The fields are pre-populated based on the profile. Select a new provider using the Search box and entering an email address. If a name does not appear, use the + button to add a different provider.
Create a New Program Application (cont’d)

• Once you complete the first section of the application you can save your work (click SAVE AND FINISH LATER) and return at any time to complete and submit the application.
Upload Required Documents

• Document requirements may vary depending on the type of application you are submitting (provincial; national; one, two, or three credits per hour, online, etc.)

• **Note:** COI Disclosure forms must comply with the National Standard

• You cannot proceed to the payment page until a file is uploaded for each of the required documents:
  o Content of the program/activity
  o COI slide template (mitigating bias slide must be completed at the time of submission)
  o COI Disclosure Forms (planning committee members)
  o Summary of previous event evaluations
  o A copy of the program/session evaluations(s) forms(s)/format(s)
  o Program invitation or brochure
  o Sponsor branding
  o Tools used to facilitate needs assessment
  o Program schedule
  o Other

  **Note:** Uploaded documents must match the related description (e.g., do not use Other to upload the COI Disclosure Form)
Payment Methods: Credit card or invoice

- Applications will not proceed without payment. If you select Invoice, you cannot change to Credit Card once the application is submitted.
CERT+ Application Payment Information

- Enter contact information for the person responsible for payment/receipt
- Click **CONTINUE** to go to the credit card payment screen; if you selected **Invoice**, this screen will not appear

**Note:** Whether you select **Credit Card** or **Invoice** you will receive a detailed invoice with a breakdown of the costs
CERT+ Post-Payment Process

- Once the credit card payment is received the application moves to the CFPC member confirmation stage.
- Applications pending payment due to the invoice option will not proceed until payment is received.
- If you decide to change payment method from Invoice to Credit Card, you must contact the CFPC office to make the payment. This pertains to both national and provincial applications.
- Do not email payment information—the CFPC system will block the payment as a security measure.
- After payment is completed, an automatically-generated CERT+ email is sent to CFPC members to confirm program involvement.
- Only the required CFPC members will receive an email to confirm their involvement in the program; other scientific planning committee members are not required to confirm their involvement.
CERT+ Post-Payment Process (cont’d)

- Once members confirm their involvement (one CFPC member for provincial applications; three CFPC members for national, two- and three-credits-per-hour programs) the application will proceed to the administration stage.
- Members can confirm involvement either through their member account (select CERT+ link under Quick Links) or through their CERT+ account.
- The CERT+ Team (administrators) will screen the application submission for any issues before assigning it to reviewers.
- If the administrator needs additional information the application will be returned to you (the provider) as “Needs More Information,” along with comments about the issue.

**Note:** Missing or incomplete documentation is a common reason for an application to be sent back at this stage.

- All completed speaker COI forms are not required at the time of submission, but must be collected and retained by the Provider in the event of an audit.
Mainpro+ Reviewer Role

- National applications (programs delivered in more than one province; two or three credits-per-hour; offshore applications) are assessed by two Mainpro+ reviewers
- Provincial applications (programs delivered in a single province) are assessed by one Mainpro+ reviewer
- Review status depends on the overall program score
- Mainpro+ reviewers enter decisions in CERT+ under the following categories:
  - Approved
  - Changes requested
  - Rejected
- CERT+ sends an email update to the provider indicating one of the above review categories
- Providers are referred to the comments field, to address specific reviewer requests
CERT+ Program Approval Notification Email

• Information included:
  o Details related to use of Mainpro+ Certification Statements
  o Attendance certificate requirements
  o Instructions for submitting a program session or ethical review if required, to receive final certification

**Note:** Notification is for approval only. An ethical review/session must be submitted for final certification.

• Mainpro+ approval timelines (from time of approval):
  o one credit-per-hour category – 12 months
  o two credits-per-hour category – 18 months
  o three credits-per-hour category – 24 months
CERT+ Program Changes Required Notification Email

- Log in to your CERT+ account
- On the HOME tab applications with the status Changes Required should appear under the heading **Pending Action By Me**
CERT+ Program Changes Required Notification Email (cont’d)

- Open the program application that requires changes
- Click **VIEW COMMENTS** to see reviewer feedback
CERT+ Program Changes Required Notification Email (cont’d)

- Select the Reviewer requesting changes based on the Comments (for National applications comments from two reviewers may appear; Provincial applications will only show one)

<table>
<thead>
<tr>
<th>COMMENTS</th>
<th>SUBMITTED BY</th>
<th>ROLE</th>
<th>SUBMITTED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please update learning objectives</td>
<td>Reviewer 2</td>
<td>National Reviewer</td>
<td>06/09/2016 8:50PM</td>
</tr>
<tr>
<td>Please update learning objectives to reflect needs assessment</td>
<td>Reviewer 1</td>
<td>National Reviewer</td>
<td>06/09/2016 8:46PM</td>
</tr>
<tr>
<td>Planning1,Albert</td>
<td></td>
<td>Planning Committee</td>
<td>06/09/2016 2:13PM</td>
</tr>
<tr>
<td>Planning1,BC,Johnson</td>
<td></td>
<td>Planning Committee</td>
<td>06/09/2016 2:13PM</td>
</tr>
<tr>
<td>JohnA, Doe</td>
<td></td>
<td>Planning Committee</td>
<td>06/09/2016 2:12PM</td>
</tr>
</tbody>
</table>
CERT+ Program Changes Required
Notification Email (cont’d)

• Read the Comments/suggestions addressing the requested changes/concerns to the program materials
**CERT+ Program Changes Required Notification Email (cont’d)**

- To make the necessary changes, open the program application and click **EDIT**
- Upload any newly requested materials/revised documents, etc., under Quality Criteria/Documents, using the small + button
- Do not remove existing application files that were submitted
CERT+ Program Changes Required Notification Email (cont’d)

• Use the Comments field on the Payment screen to respond to reviewer comments/requests and click **SUBMIT**

• Ensure the application has moved completely out of your account; if Changes Required still displays, the changes have not been submitted

• You must log a response within 30 days of the notice of required changes; the program application will be rejected if no response is received within 30 days

Comments* is a required field.
CERT+ Program Rejected Notification Email

• The CERT+ administrator will review a Rejected application to ensure that the issue is not something that can be addressed under the Changes Required option
• Information sent to providers will include the notification of Rejected
  o You must to log into the CERT+ account in which the program is located to see the reviewer results
• Follow-up option 1: Submit a new application and fee payment
• Follow-up option 2: Submit an appeal to the CFPC office; you can email an appeal letter to certplus@cfpc.ca
CERT+ Ethical Review Submission

• If an approved program has for-profit support, an ethical review submission is required for each session delivered.
• All programs delivered outside of Canada are required to submit an ethical review, regardless of program financial support.
• The ethical review must be submitted 10 business days prior to the program delivery date.
• Log into your CERT+ account.
• On the PROGRAMS tab, select the Program Title for which the ethical review is to be submitted, and then click ADD SESSION.
CERT+ Ethical Review Submission (cont’d)

- Complete any required fields on the ENTER NEW SESSION screen
  - If you choose to include the program in the CFPC Calendar of Events, all information entered will appear on the CFPC public website
  - The session Duration Time cannot be longer than the approved amount

- Click CONTINUE to advance to the next screen (two screens to be completed)

Note: Make sure the correct province is selected; if the incorrect one is listed the submission will be rejected
CERT+ Ethical Review Submission (cont’d)

• At least one of the following three types of documents must be uploaded in order to submit the session for ethical review:
  o Session and invitation and materials
  o Completed COI slides
  o Other Promotional Materials

  **Note:** The Other Promotional Materials type is optional.

• All completed speaker COI forms are not required at the time of submission, but must be collected and retained by the Provider in the event of an audit.
CERT+ Ethical Review Submission (cont’d)

- A Session Identifier will be assigned; the number is nine digits (the first six refer to the Program ID, the next three are the Session ID (e.g., 123456-001))
- Ethical review applications are submitted to the Chapter (provincial and national programs) or the CFPC office (programs delivered outside of Canada)
- The ethical review application fee is applied at the time of submission
  - Credit card payment—the submission will proceed to the review stage
  - Invoice option—the submission will not proceed until the payment is received

**Note:** For provincial programs the first ethical review fee is included in the initial application fee.
CERT+ Ethical Review Changes Required Notification Email

• Log into your CERT+ account
• On the HOME tab applications with the status Changes Required should appear under the heading Pending Action By Me
• Go to Sessions

![Image of the CERT+ dashboard showing the Pending Action By Me section and a list of sessions with the status Changes Required.](image-url)
CERT+ Ethical Review Changes Required Notification Email

- Open the session requiring changes
- Click **VIEW COMMENTS** to see changes requested
- Click **EDIT** to make requested changes/upload new documents
- Enter your comments in the Required Comments* field and then click **SUBMIT**
CERT+ Ethical Review Approval (Final Certification) Notification Email

• Information will include:
  o Final certification notification of session
  o Details related to use of Mainpro+ Certification Statements (for use on Certificate of Participation/Attendance)
  o Any additional information to be submitted post-event (evaluations/attendance sign-in), if requested
• Session ID should be included on the Certificate of Participation/Attendance
• Members can use the Session ID when reporting their credits
CERT+ Adding a Session: When an ethical review is not required

- This is a mandatory requirement for live, not-for-profit programs with no external support
- Providers should follow the same steps for submitting an ethical review
- There are fewer questions and no fee, and programs are automatically submitted (no approval or document upload required)
- The session status will appear as Submitted
Questions About Using CERT+?

Call the CERT+ Hotline:
1-866-242-5885 or 905-361-8233
or email:
certplus@cfpc.ca