



Risr Advance CPD

Overview



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risr/platform

The risr/platform is a cloud hosted service, made up of 3 key components all of which can be utilised as a full-suite of integrated service modules or as standalone service modules.

- risr/apply (Exam and Event booking & registrations)
- risr/assess (End-to-end exam management & delivery)
- risr/advance (Workplace based assessments, ePortfolio & CPD/PCS)

risr/apply is our Memberships, Exams and Events Booking module that compliments the life-long learning journey of a trainee/student through Examination, Workplace Based Assessment, CPD and Revalidation. risr/apply has been designed and delivered, as many of our services are, in collaboration with our customers. risr/apply enables the publishing, online booking and payment of subscriptions, memberships, exams, courses and events and is integrated directly with risr/advance and risr/assess to automate the whole process. The system enables automation of eligibility rules and a single view for both Administrators and Trainees/Students in their progression.

risr/assess is our end-to-end exam management solution. risr/assess delivers a number of question types including MCQ, SAQ, SBA, MEQ & EMQ Papers (Online Electronic and/or Paper delivery). risr/assess is currently being used by the most advanced medical assessment and training organisations around the world. The “out of the box” functionality covers question/item bank, exam preparation, design and delivery, exam processing, analysing and reporting. risr/assess is highly flexible, allowing both online or paper based assessments to be delivered. Finally, risr/assess unrivalled OSCE, SOE, Oral, MMI and project online remote video delivery capability means that customers are able to deliver all exam types from a single exam management solution and are future-proofed with our integrated platform.

risr/advance is our cloud hosted ePortfolio management solution for preparing, delivering and processing online Workplace Based Assessments and CPD/PCS. risr/advance is a key component of our integrated cloud hosted eAssessment services Platform.

risr/advance is integrated into the eAssessment platform to deliver a seamless and high quality user experience. risr/advance is currently being used by some of the most advanced Medical Assessment and Training organisations in the world and is continuously developed (as

with all 3 components of our platform) alongside our customers to ensure our services stay relevant and constantly innovate. risr/advance will enable customers complete flexibility in configuring Workplace Based Assessments, fully automated workflow, mobile/offline working, standard blueprinting, in-built notifications and event creation.

Risr Advance

The core functionality of Risr Advance CPD falls into three key areas: the capture of CPD activities and supporting evidence, the tracking and monitoring of progress against defined CPD requirements, and the reporting and analysis of this data. The solution is delivered as a flexible platform rather than a bespoke tool, so configuration can be managed directly by the customer without changes to the underlying software. New CPD activity forms, workflows, reports and dashboards can be created by the customer, with help and support provided by Risr.

CPD Activity Capture

Users can record CPD activities and upload evidence directly to their CPD record. This can follow structured templates defined by the customer or be completed in a more flexible manner, depending on policy. CPD records can be created by the individual, and can also be created on their behalf by permitted roles such as administrators, educators, supervisors, or event organisers, ensuring the CPD record reflects a complete journey rather than only self-reported activity. Records can be created directly within Risr Advance or by uploading externally prepared evidence. A chronological timeline of CPD activity and evidence is maintained, supporting search, filtering, and categorisation over multiple years, including segmentation by CPD cycle or reporting period. Each activity can include reflection and feedback fields, allowing users to document learning outcomes and demonstrate impact on practice.

Risr Advance CPD supports the inclusion of multimedia evidence, including documents, images and other common file types. Users can be granted open-ended access to create and upload evidence, and are not limited to pre-defined templates where flexibility is required. Activities and evidence can be tagged to CPD categories, themes, and competency frameworks managed by the customer, allowing users to compile collections of evidence for appraisal, revalidation, or annual review. Content can be shared with other roles based on configured permissions, enabling managers or supervisors to review submissions and provide feedback or sign-off where required.

Users can submit personal development plans that follow templates created by the customer. These can be narrative in nature, or can include actionable targets that are tracked via the system. It is possible to configure surveys and learning needs analysis tools in the system, which can be reviewed by the user in partnership with their assigned supervisor.

As well as more formalised CPD activity forms used to record progress against the frameworks, a variety of other evidence submission types can be configured on Risr Advance. This allows learners to add their written research, QI or audit based projects to their CPD portfolio – either for future reference, evidence of completion, or to facilitate an assessment process. It is possible to mark these on the system if necessary, and to facilitate a feedback process for learners. Additionally, the system integrates with plagiarism detection software, to strengthen the robustness of the assessments.

Workflow Authentication

All forms and evidence capture processes have an associated workflow on the system, allowing for interaction between the user and any applicable supervisor or assessor. This includes processes where forms may go back and forth between different users – for example where a learner initiates a CPD activity entry, it is assessed by another user, and then returned to the learner for feedback and reflections. These workflows can be configured by the customer, with automated logic able to be applied to skip certain sections or escalate if certain conditions are met. If permitted, users are also able to retract their workflow submission, if it is still pending. This can aid learners where they have submitted work to one assessor, but wish to reassign the assessor due to inactivity.

The Goals functionality in the system allows the customer to set deadlines for CPD records to be submitted on time, and the learner is able to see if they comply with these. Messages can be sent via the system to remind users of upcoming submission deadlines.

A variety of methods can be used to ensure that the user who signs-off a section of an assessment form is the correctly allocated and permitted user. Digital signatures can be captured, with declarations of compliance included. Depending on the type of form and assessment, the customer can specify whether the user needs to be authenticated and logged in to the system under their own account, whether they can complete the form on a learner's device with appropriate review, or whether an external assessor can participate, without needing a full account.

Risr Advance supports the completion of forms on the same device, where a mobile phone is passed between users in order to complete the assessment. However, controls need to be applied to prevent any potential misuse or abuse of the system. In addition to the provision of a digital signature, users can be required to verify that they completed the learner's form via a two-click process in their email account. They are also able to make further amendments to

the submission at this time. The system also allows restriction to certain email domains, so for example users must have an @nhs.net email account in order to participate in the assessment (customer can define the approved domains).

Progress Tracking

Risr Advance CPD supports automated progress tracking against CPD requirements defined by the customer. Requirements can be configured as checklists or rule-based targets, which can count activities, hours, points, categories, or combinations of requirements across a CPD cycle. Progress can be shown to the user and to permitted reviewers, enabling shared visibility of completion status and outstanding requirements. Requirements can also include deadlines and optional approval gates, supporting policies where CPD must be validated before it is counted towards completion.

Users can optionally be allowed to set personal development goals alongside organisational CPD requirements. Evidence can be linked automatically to requirement categories based on configured rules, or users can be given discretion to link evidence to the most relevant requirement where policy allows. Managers, supervisors and administrative users can be granted oversight to track progress across individuals or cohorts, supporting compliance monitoring and targeted support.

Dashboards, Reporting and Analytics

Risr Advance includes a sophisticated reporting engine and builder, allowing bespoke report templates to be constructed in the system, based on data that has been created by users. Customer organisations can build these reports in the system themselves, with support and guidance provided by Risr. The reporting engine allows reporting on a wide range of data, including CPD statuses, activity, progress against goals and segmentation. Information such as user status, exam history, and enrollment can be used to segment and filter users, allowing complex queries to be created easily. These report templates can have hierarchical permissions applied, so the same report can be run by a learner on themselves, a supervisor on their learners, and an admin on the whole region/country.

Reports can be constructed using additive logic, such that different segmentation variables can be combined. This allows queries such as the learners in a region, who have met standards at a certain level, but have incomplete training with activities outstanding to be run. Date range

filters can also be applied, as well as training status. Comparisons and breakdowns between segments can be created, and data can be ranked and ordered as required. Reports can be run on the submitted evidence, users of the system and goals. Users can be filtered by their training phase, year or completion status, among any other custom category created by the customer.

Risr provides full training on the reporting engine for customer admins as part of the implementation process, and will help configure the initial set of reports required to launch the system. On an ongoing basis, Risr is able to work with the customer to guide and assist in the creation of new report templates or those that need to be run on an ad-hoc basis via Service Desk support.

Each user can have their own dashboard, which can be configured by the customer to display the user's progress against CPD programme requirements. This includes both graphical and tabular displays of data, with custom reports and analysis able to be conducted on the system. Trainees can track their progress on the system, and identify any attainment gaps. They can have a dedicated feed of assessment tools, which can be searched and filtered as necessary. Additionally, supervisory/Trainer users can be provided with customised dashboards showing the progress of learners for which they are responsible.

CPD Functionality

The Risr Advance platform supports the capture, tracking and analysis of CPD activities for members, and is used by many organisations to enable a lifelong learning approach. Post-training, members are able to continue using the system, and gain access to CPD functionality where they can log completed activities against frameworks defined by the customer. Depending on the CPD model used by the customer, this can optionally overlap with training, so a learner can also have CPD activity requirements. It is also possible to have shared roles for supervisory users – so for example a supervisor may have access to the system to monitor the progress of their trainees, but also have their own CPD evidence requirements for submission.

Depending on the configuration desired by the customer, members are able to both self-record CPD activities, and have these created for them in bulk by attending pre-approved events/activities. When self-recording, users can complete a customised form, providing details of the activity, provider (if applicable), learning outcomes, time taken, and links to the

professional competency requirements, alongside any other required information. This can optionally require approval by another user (e.g. CPD supervisor) or the customer, or the member can self-approve if permitted to do so.

Where the member participates in customer run or approved events/activities, it is possible to load these into the system in bulk for attendees. This means that the member does not need to log all of the requisite details, but can provide their own reflections and commentary for the activity. It is also possible to capture feedback about the event. This can save time for members, and allow the customer to provide a seamless experience for CPD events that are delivered directly.

Competency frameworks can be created in the system, with members either able to manually link activities to these, or if desired, automatic linking can be supported against event type. This framework can be made available to CPD-enrolled members, and can be updated and maintained by the customer. Users are able to search, filter and report against these frameworks, and can track their progress against CPD requirements.

It is also possible to share information to members about upcoming CPD events, and send messages/notifications to sub-groups of members (e.g. all in a certain region, training/CPD stage, role type etc). Additionally, our Risr Apply solution supports the registration, booking and scheduling of CPD Activities (including payment processing). This can enable a seamless experience for the user to see an available event, book on to it in the system, and then record their learnings and reflections post-event.

CPD activities can be measured and tracked in different ways, depending on customer policy. This includes annual cycles, multi year requirements or on a continuous basis. If desired, tracking can be calculated on a hours or points based system, or on total summation of activities. The progress of a member can be monitored on their own dashboard view, and depending on the CPD model followed by the customer, other users can also be given access to track and/or sign-off on progress.

CPD functionality is provided on a separate licensable basis by Risr, typically with a lower per-user fee. Further details can be provided, including a quotation should the customer wish to move ahead with CPD functionality in addition to the training portfolio.

A range of devices can be used to access the system, record assessments and track progression. The system supports usage on PCs, tablets and smartphones (with all functionality available). Windows, macOS, iOS and Android are all supported in their latest

major release. A modern web browser is required to access the system, and Chrome, Firefox, Safari and Edge are supported. Assessments can be recorded on mobile devices (phones and tablets) on our Web App, and users are able to complete these on- and offline. Online access is required to run reports and view previously recorded data.

Systems integration

It is possible to integrate Risr Advance with various third-party systems, including membership databases, LMSs and CRMs. This can be used to both import and export data, including learner profile data (such as personal data, training data and placement information), as well as progression and status information. This can be achieved by using our public API, which allows organisations to directly integrate Risr Advance within their existing business information systems.

Updates to user profile and enrolment information can be transferred, so that ePortfolio records match those on the internal database. In addition to user information, exam and other external assessment data can be captured in the system. This can be transferred from Risr Assess, or from external systems.

Placement data can be used to enable relationships within the system, such that if a user is at a certain site for their placement, supervisory users at that specific site can monitor the progress of the learner for that placement. Assessments and gradings about placements can be recorded in Risr Advance, or can be transferred into the system via integration.

It is possible to include information about Exams that have been completed by learners on the Risr Advance platform. This can either be uploaded directly to the system, or can be transferred via integration. Exam data can include the details of the attempt, the marks and outcome achieved, feedback about the exam, and the date of passing, and any custom metadata. This can appear as an event in the user's timeline, as well as on a dashboard tile on the system. It is possible to generate results letters in the system, via a report template, which allows for these to be downloaded by the learner.