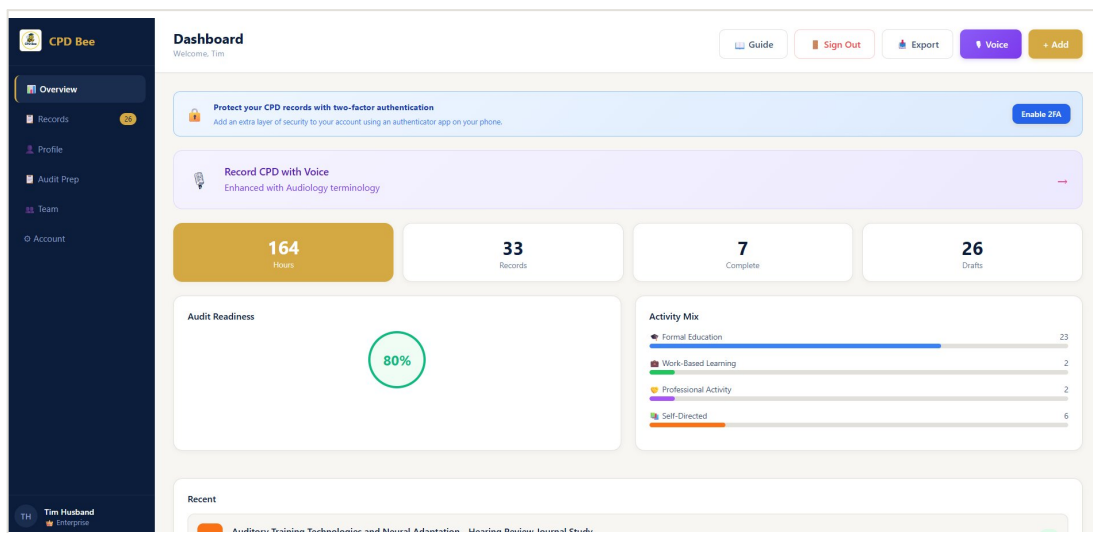


CPD Bee

User Guide

A complete guide to recording, managing, and exporting your Continuing Professional Development activities with CPD Bee.



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Website **cpdbee.co.uk**

Support **info@cpdbee.co.uk**

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1. Getting started

CPD Bee is a web application that runs entirely in your browser. There is nothing to install — visit cpdbee.co.uk on any device and create an account. It works on iPhone (Safari), Android (Chrome), tablets, and desktop browsers.

Creating your account

1. Visit cpdbee.co.uk and click **Start Free Trial**
2. Enter your email address and choose a password — it must be at least 8 characters and include a number and an uppercase letter
3. Check your email inbox for a confirmation link and click it to verify your address
4. Sign in and complete the onboarding wizard (5 short steps):
 - **Step 1** — Your first name and surname
 - **Step 2** — Your profession, regulatory body, specialism, years qualified, role, and employer
 - **Step 3** — Your professional development goals
 - **Step 4** — Your preferred learning styles (workshops, online, reading, etc.)
 - **Step 5** — Review your details and confirm

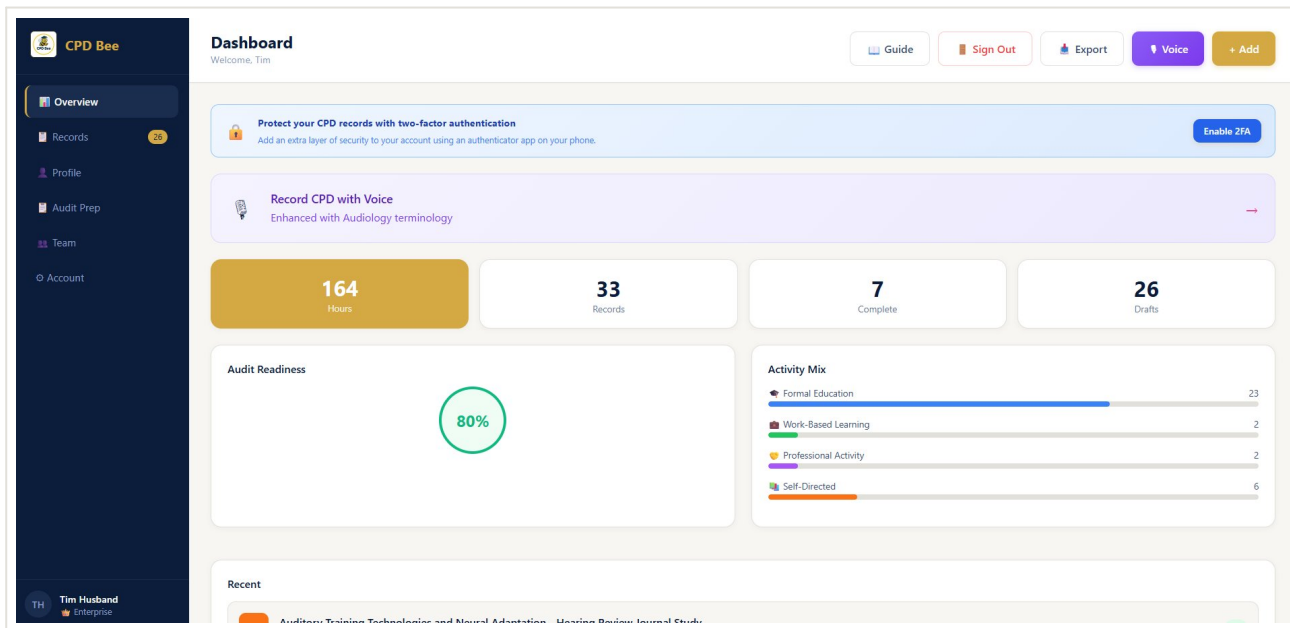
Tip: When you select your profession, CPD Bee activates a voice lexicon with hundreds of phonetic corrections for your specialty. This is what allows the app to correctly recognise clinical terms like "tympanometry", "echocardiography", or "spirometry" when you speak — even if your phone's speech recognition gets the pronunciation wrong.

Free trial

Every new account includes a **28-day free trial** with full access to all features including voice recording, AI analysis, document import, course finder, and export. No credit card is required to start.

2. Your dashboard

The dashboard is your home screen. It provides an at-a-glance summary of your CPD progress for the current registration year, along with quick access to all features.



The dashboard overview showing the navigation sidebar, summary cards, audit readiness score, activity mix breakdown, and recent records.

The navigation sidebar

The dark sidebar on the left-hand side gives you access to every section of the app. It is always visible on desktop and collapses on mobile devices.

Tab	What it shows
Overview	Summary cards, audit readiness, activity mix chart, recent records
Records	Full CPD record list, search and filter, document import tools
Profile	Professional details, recording style preference, CPD Course Finder
Audit Prep	Detailed audit readiness scoring against HCPC/AHCS standards
Team	Team member management (Enterprise plan only)
Account	Membership, billing, security settings (MFA), data management

Nurses and midwives will also see an **NMC Revalidation** tab that tracks all revalidation requirements.

Summary cards

The four cards at the top of the dashboard give you an instant picture of where you stand:

- **Hours** — total CPD hours accumulated against your annual target
- **Records** — the total number of CPD records you have saved
- **Complete** — records that have been fully reviewed and marked as complete
- **Drafts** — records that are still awaiting your review

Below the summary cards, you will see your **Audit Readiness** percentage and an **Activity Mix** chart showing how your records are distributed across the four activity types: formal education, work-based learning,

professional activity, and self-directed study.

Header buttons

The buttons in the top-right corner are always available regardless of which tab you are on:

- **Guide** — opens this user guide in a new tab
- **Sign Out** — logs you out of your account
- **Export** — opens the export modal to download your records
- **Voice** — opens the voice recording screen
- **+ Add** — opens the manual record entry form

3. Recording CPD with your voice

Voice recording is the fastest way to create a CPD record. Simply speak naturally about your learning activity and the AI will create a complete, structured record for you — including title, activity type, duration, description, reflection, and impact on patient care.

How to record

1. Click the purple **Voice** button in the dashboard header
2. When the recording screen opens, click the purple **microphone button** to begin
3. Speak naturally about your CPD activity. You don't need to use formal language — just describe:
 - What the activity was (workshop, conference, journal reading, case discussion, etc.)
 - How long it lasted
 - What you learned or found most valuable
 - How it will affect your clinical practice or benefit your patients
4. Click the microphone button again to **stop recording**
5. Wait a few seconds while the AI analyses your transcript and generates all record fields
6. Review every field the AI has generated — edit anything you want to change
7. Click **Save** to store the record (it will be saved as a Draft)

Tip: The AI converts casual, natural speech into professional clinical documentation that meets audit standards. For example, you might say "I went to a really good echo workshop today" and the AI will produce a formal description like "Attended a structured echocardiography training session covering advanced imaging techniques." The more clinical detail you include in your speech, the richer the AI output will be.

Phonetic corrections

CPD Bee includes **580+ phonetic corrections** for clinical terminology across all supported professions. These run automatically and silently in real time as you speak. If your phone transcribes "tim panometry" instead of "tympanometry", or "echo cardiography" instead of "echocardiography", the correction happens before the AI ever sees the text.

4. Adding records manually

If you prefer to type rather than speak, click **+ Add** from the dashboard header. This opens a form where you can fill in each field directly.

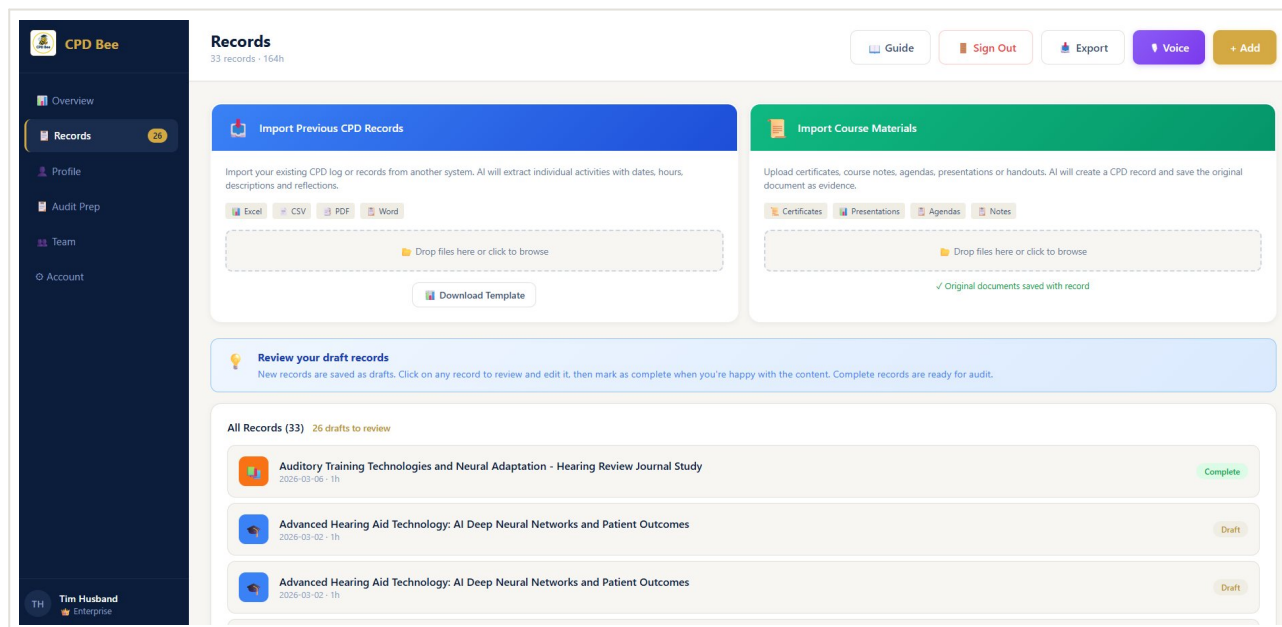
Field	What to enter
Title	A clear, professional title (e.g. "Advanced Echocardiography Workshop")
Date	The date the activity took place — defaults to today if you leave it blank
Duration	Length in hours (e.g. 1.5 for a ninety-minute session)
Type	Choose: Formal, Work-based, Self-directed, or Professional activity
Provider	The organisation or person who delivered the training (e.g. BSE, ARTP, RCN)
Description	A detailed account of what was covered — preserve clinical terminology
Reflection	A first-person reflection on what you learned and how it changed your thinking
Impact	How this learning will directly benefit your patients or service users

All new records are saved with a status of **Draft**. You can return to edit them at any time by clicking on the record in your Records list. When you are happy with all fields, change the status to **Complete** — complete records are considered audit-ready.

Tip: For HCPC audits, make sure each record has a meaningful reflection and a clear statement of impact on practice. These are the two fields auditors look at most closely.

5. Importing existing records

If you already have CPD records in documents from another system, you can import them into CPD Bee. The AI will read your files and extract structured CPD records automatically.



The Records tab showing the two import options: *Import Previous CPD Records* (from spreadsheets and logs) and *Import Course Materials* (certificates, presentations, and notes).

Two import workflows

CPD Bee offers two distinct import paths, as shown in the screenshot above:

Import Previous CPD Records — for structured data like CPD logs, spreadsheets, and reports. Supports Excel (.xlsx), CSV, PDF, and Word (.docx). The AI extracts individual activities with dates, hours, descriptions, and reflections.

Import Course Materials — for evidence documents like certificates, presentation slides, agendas, and handwritten notes. The AI creates a CPD record from the document and saves the original alongside it as evidence.

Validation badges

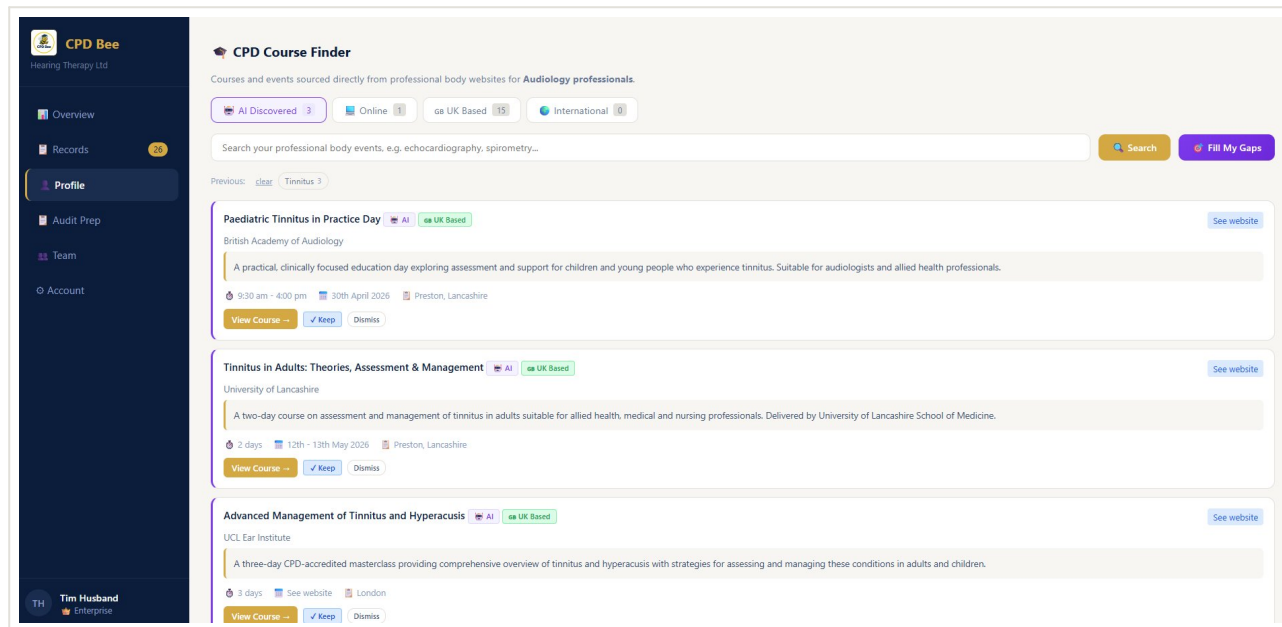
After import, each extracted record is marked with a badge indicating its quality:

Badge	Meaning	Action needed
Valid	All required fields are populated correctly	Ready to save — review if you wish
Warning	Some fields may be missing or uncertain	Review and fill in any gaps
AI	One or more fields were enhanced by AI	Check that the AI additions are accurate
Duplicate	A similar record already exists	Decide whether to keep or discard
Certificate	The document appears to be a certificate	Verify the details are correct

Tip: Your original uploaded documents are saved securely alongside the CPD record for reference. They are encrypted at rest using AES-256 and are only ever accessible to you.

6. CPD Course Finder

The Course Finder helps you discover relevant CPD courses and events by searching real professional body websites. It covers over **80 verified sources** including UK professional bodies (BAA, BSA, SCST, BSE, ARTP, RCN, CSP, RCOT, and more), online platforms (BMJ Learning, FutureLearn, e-LfH, Coursera), and international organisations (ESC, ERS, AAA, ICN).



The CPD Course Finder showing search results for "Tinnitus" with AI Discovered, Online, UK Based, and International tabs.

How to search

1. Go to the **Profile** tab and scroll down to the CPD Course Finder section
2. Type a topic into the search bar — for example "tinnitus", "echocardiography", or "wound care"
3. Click the gold **Search** button. The AI fetches and reads real professional body web pages in real time
4. Browse the results. Each course card shows the title, provider, description, date, location, and duration
5. Click **Keep** to save a course to your library, or **Dismiss** to remove it from the results

You can also click **Fill My Gaps** — this analyses your existing CPD portfolio and suggests courses in areas you haven't covered recently.

The four course tabs

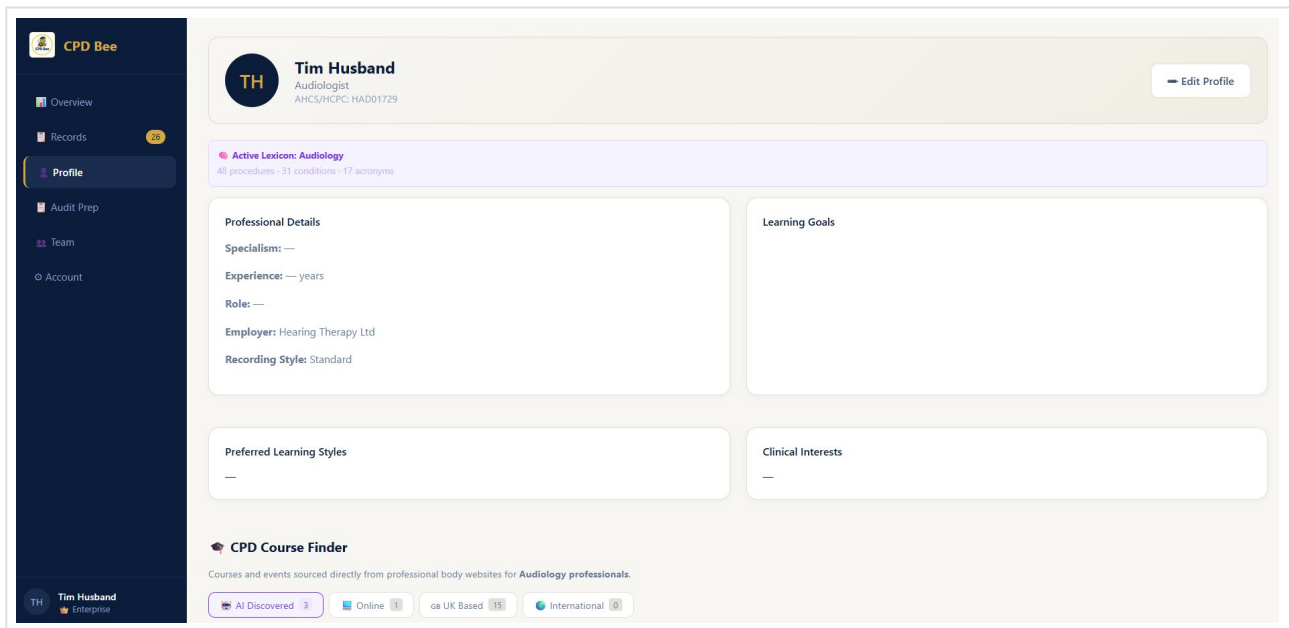
Tab	What it contains
AI Discovered	New search results with Keep and Dismiss buttons — review these first
Online	Courses you have kept that are delivered online (e-learning, webinars, self-paced)
UK Based	Courses you have kept that are face-to-face events in the United Kingdom
International	Courses you have kept that are conferences or training outside the UK

When you click **Keep**, the course automatically moves to the correct tab based on its category. The tab counts update in real time. You can remove saved courses at any time by clicking **Remove** on the saved tab.

Tip: Course data is fetched directly from real professional body websites using a headless browser. The AI extracts only courses that actually appear on those pages — it does not invent or hallucinate courses. Always click "View Course" to verify availability and book directly with the provider.

7. Your profile and recording style

Your profile stores all your professional details. You can view it on the **Profile** tab and update it at any time by clicking **Edit Profile**.



The Profile tab showing professional details, active lexicon, recording style, and the CPD Course Finder below.

What your profile includes

- **Name and profession** — displayed throughout the app and in exports
- **Regulatory body and registration number** — AHCS, HCPC, or NMC
- **Specialism, experience, role, and employer** — used for context in AI analysis
- **Active lexicon** — shows the phonetic correction set loaded for your profession
- **Recording style** — controls the tone of all AI-generated content
- **Learning goals, preferred styles, and clinical interests** — used by the Course Finder

Recording style

The **Recording Style** setting controls how the AI writes your CPD records. It affects all AI-generated content: voice recordings, document imports, and enhanced fields. You set it in Edit Profile and it applies globally.

Recording style

The **Recording Style** preference controls the tone and writing style of all AI-generated CPD content — voice recordings, document imports, and AI-enhanced fields. Choose the style that best matches how you naturally communicate.

Style	Tone	Example output
Standard	Balanced professional (default)	<i>attended a two-hour workshop on advanced echo techniques...</i>
Formal	Third-person academic	<i>"The practitioner attended a two-hour workshop on advanced..."</i>
Informal	Conversational, natural	<i>"I went to a really useful session on echo today..."</i>
Scientific	Evidence-based, methodological	<i>Evidence from this session supports the clinical use of..."</i>
Brevity	Concise — half the word count	<i>Echo workshop. Strain imaging and 3D assessment covered."</i>

Your style preference is saved to your profile and applies every time the AI generates content. You can change it at any time — the new style takes effect immediately on your next AI interaction.

The five recording styles with example output for each.

Style	When to use it
Standard	The default. A balanced professional tone suitable for most users.
Formal	If you prefer third-person academic writing, e.g. for research-oriented portfolios.
Informal	If you want your records to sound natural and conversational — closer to how you actually speak.
Scientific	If you work in a research or evidence-based context and want methodological language.
Brevity	If you want concise records with roughly half the word count. Same clinical accuracy, fewer words.

Your chosen style is saved to your profile and applies every time the AI generates content. You can change it at any time — the new style takes effect immediately on your next AI interaction, with no need to reload the page.

8. Exporting for audit

When your regulator requests your CPD portfolio — whether for an HCPC audit, NMC revalidation, or AHCS review — CPD Bee can generate a complete, professionally formatted document in seconds.

Available formats

Format	Best for
PDF	Direct submission to your regulator. Includes a title page and formatted records table.
Word (.docx)	When you need to add a cover letter, additional notes, or make edits before submitting.
Excel (.xlsx)	When your employer needs a spreadsheet, or you want to analyse your CPD data.

How to export

1. Click the **Export** button in the dashboard header (available from any tab)
2. Choose your format — PDF, Word, or Excel
3. Optionally set a **date range** to export only a specific period
4. Optionally filter by **record status** (complete, draft, or all) and **activity type**
5. Click **Export** — the file downloads to your device immediately

Each exported record includes: title, date, duration, activity type, provider, description, reflection, impact on practice, and learning outcomes. The PDF format also includes a summary page with your profession, registration details, and portfolio statistics.

9. NMC revalidation

Nurses, midwives, and nursing associates have access to a dedicated **NMC Revalidation** tab. This appears automatically when your registered profession is NMC-regulated. It tracks every requirement for revalidation in one place.

Requirements tracked

Requirement	Target	How CPD Bee tracks it
CPD hours	35 hours (min. 20 participatory)	Automatically totalled from your records by activity type
Reflective accounts	5 accounts	Counted from records with reflections linked to NMC Code themes
Practice hours	450 hours over 3 years	Entered manually or via your profile
Professional indemnity	Confirmation held	Self-declaration checkbox
Health and character	Self-declaration	Self-declaration checkbox
Third-party confirmation	Discussion completed	Self-declaration with confirmer name
NMC Code coverage	All 4 themes	Mapped automatically from your record content

Revalidation portfolio export

Click **Export Revalidation Portfolio** to generate a PDF formatted specifically for NMC submission. This includes all required sections presented in the correct order, with your personal details, CPD log, reflective accounts, and declarations. You can submit this directly to your confirmer or to the NMC.

10. Enterprise team management

The Enterprise plan (£29.99/month) allows you to manage a team of up to 8 healthcare professionals. You can monitor CPD progress across your team, run compliance reports, and apply your organisation's branding throughout the app.

Inviting team members

1. Go to the **Team** tab (this tab only appears on Enterprise plans)
2. Enter your colleague's email address and optional name, then click **Send Invite**
3. They will receive an email with a link to join your organisation — the link is valid for 7 days
4. Once they accept the invitation and complete their profile, they appear in your team dashboard

What the team owner can see

As the team owner, your Team dashboard shows a **summary card** for each member with:

- Their total CPD hours and target progress
- Number of records (complete and draft)
- Their audit readiness score
- Their activity type mix

Privacy note: Team owners can see summary progress data (hours, scores, record counts) but **cannot** read the content of individual CPD records. Your reflections, descriptions, and impact statements are always private to you.

Team roles

Role	Permissions
Owner	Full control: invite/remove members, view all progress summaries, manage billing, apply org branding
Admin	Manage team members and view progress summaries
Member	Manages their own CPD records only — their record content is private

Organisation branding

Enterprise owners can upload their organisation's logo, set a brand colour, and add the organisation name. These appear throughout the app for all team members, giving a professional, branded experience.

11. Account and security

Membership plans

Plan	Price	What you get
Free trial	28 days free	Full access to every feature — no credit card required
Professional	£4.99 / month	Unlimited records, voice recording, document import, export, course finder
Enterprise	£29.99 / month	Everything in Professional + team management (up to 8), org branding, compliance tools
NHS / Education	Custom pricing	Unlimited users, SSO integration, custom reporting, dedicated account manager

Security features

CPD Bee is built with healthcare-grade security at every layer:

- **AES-256 encryption at rest** — the same standard used by governments and financial institutions
- **TLS/HTTPS encryption in transit** — every connection between your device and our servers is encrypted
- **Two-factor authentication (MFA)** — optional TOTP-based protection using Google Authenticator, Microsoft Authenticator, or Authy
- **Row-level security** — database-level data isolation ensures no user can ever access another user's records
- **PII redaction** — personal identifiable information is stripped before any data reaches AI processing
- **GDPR compliance** — full Article 17 Right to Erasure; delete all your data at any time from Account settings

Setting up two-factor authentication

Two-factor authentication adds an extra layer of security to your account. Once enabled, you will need both your password and a 6-digit code from your authenticator app to sign in.

1. Go to the **Account** tab and find the Two-Factor Authentication section
2. Click **Enable 2FA** — a QR code will appear on screen
3. Open your authenticator app (Google Authenticator, Microsoft Authenticator, or Authy) and scan the QR code
4. Enter the 6-digit verification code shown in your authenticator app to confirm setup

From this point on, every time you sign in you will be asked for a code from your authenticator app in addition to your password.

Deleting your account

From the Account tab, click **Delete Account**. This permanently and irreversibly removes your profile, all CPD records, uploaded documents, and any associated data from our systems. This complies with GDPR Article 17 (Right to Erasure) and cannot be undone.

12. Frequently asked questions

Does CPD Bee work on my phone?

Yes. CPD Bee works on iPhone (Safari), Android (Chrome), tablets, and desktop browsers including Edge and Firefox. There is nothing to install — it runs entirely in your web browser. Voice recording works on all platforms that support the Web Speech API.

Can I edit what the AI writes?

Yes — always. The AI generates a draft record which you review before saving. You have full control over every field including title, description, reflection, and impact. The AI is a time-saving tool, not a replacement for your professional judgement.

What if the AI gets a medical term wrong?

CPD Bee includes 580+ phonetic corrections for clinical terminology across all supported professions. These correct common speech recognition errors automatically. If a term is still incorrect, you can edit it directly in the record before saving.

Is my data safe?

Yes. All data is AES-256 encrypted at rest, encrypted in transit via TLS/HTTPS, and isolated at the database level with row-level security. You can enable two-factor authentication for additional protection. CPD Bee is fully GDPR compliant.

Can I change my recording style later?

Yes. Open your Profile, click Edit Profile, and change the Recording Style dropdown. The new style takes effect immediately on your next AI interaction — no reload needed.

How do I prepare for an HCPC audit?

Go to the Audit Prep tab to review your readiness score. The four HCPC standards are: accurate record-keeping, a mixture of activity types, evidence of impact on practice, and benefit to service users. Make sure you have complete records across all four activity types, with detailed reflections. When ready, export your portfolio as a PDF.

Can my team lead read my CPD records?

No. Enterprise team leads see summary progress data only (total hours, audit score, record count, activity mix). They cannot access the content of your individual records. Your reflections, descriptions, and impact statements are always private.

What happens when my free trial ends?

After 28 days you will be prompted to choose a Professional or Enterprise plan. Your records are preserved safely — you simply need an active subscription to access them. No data is deleted when a trial expires.

Can I use CPD Bee for NMC revalidation?

Yes. Nurses, midwives, and nursing associates have a dedicated NMC Revalidation tab that tracks all requirements including 35 CPD hours, reflective accounts, practice hours, and NMC Code coverage. You can export a complete revalidation portfolio as a PDF.

Where are courses sourced from?

The Course Finder searches over 80 verified professional body websites using a headless browser. Sources include UK professional bodies (BAA, BSA, SCST, BSE, ARTP, RCN, CSP, RCOT, and more), online platforms (BMJ Learning, FutureLearn, e-LfH), and international organisations (ESC, ERS, AAA, ICN). The AI extracts only courses that actually exist on those pages.

Need more help?

Visit the full FAQ at cpdbee.co.uk/faq.html or email info@cpdbee.co.uk and we will get back to you as soon as possible.

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