

Moodle CPD and Certification Setup Checklist

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Use this checklist to plan and implement automated certificates and CPD in Moodle, including exams, pass criteria and reporting evidence.

1. Define the CPD and certification rules

- What triggers certificate issuance (exam pass, course completion, both)?
- CPD value and how it is displayed (certificate text, learner record, reporting export).
- Validity period and any revalidation requirements.

2. Configure course completion and evidence

- Completion criteria for key activities (SCORM views, quizzes, assignments, feedback).
- Ensure evidence is measurable (completion, grade, attempt history).
- Confirm what administrators need to report for audit.

3. Build or configure assessments

- Question bank structure and tagging.
- Exam settings: time limits, attempts, pass mark, navigation rules.
- Randomisation and question behaviour where appropriate.
- Feedback rules (immediate, deferred, review restrictions).

4. Set up certificates

- Certificate template and branding.
- Restrictions based on pass criteria and completion.
- Where certificates can be accessed and re-downloaded by learners.
- Any certificate numbering or unique identifiers required.

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5. Reporting and exports

- Dashboard views required (completion, grades, engagement).
- Export formats and frequency (CSV, scheduled exports, manual).
- Audit fields needed (name, date, attempt, grade, certificate issue date).

6. Learner journey and automation

- Registration and enrolment workflow (self enrolment, cohort, paid enrolment).
- Notifications and reminders (enrolment confirmation, expiry reminders).
- Access rules for retakes and remediation activities.

7. Accessibility and usability checks

- Keyboard navigation and focus states.
- Clear headings, readable layouts, and colour contrast.
- Meaningful alternative text for images.
- Mobile checks and responsive layout validation.

8. Go live and quality assurance

- Test as a learner and as an administrator (end to end).
- Confirm certificate triggers correctly and reporting matches outcomes.
- Confirm backup and restore expectations.
- Document the admin steps for future updates.

If you would like this implemented end to end (platform, exams, certificates and reporting), contact Danielle Green at danielle@elearndesignsolutions.co.uk.