

E-Portal Quick Guide –  
Application for  
Assessment of  
Structured Type 1  
Qualified CPD Activities  
and  
Type 1 Qualified E-  
learning Activities  
for Licensed Insurance  
Intermediaries

# Table of Contents

---

<b>1. Login to the e-Portal account</b>	<b>3</b>
<b>2. Create New Application</b>	<b>5</b>
<b>3. Fill in the CPD Assessment Online Application Form</b>	<b>6</b>
<b>4. Upload Supporting Document(s)</b>	<b>12</b>
<b>5. Payment</b>	<b>15</b>
<b>6. Submit Application</b>	<b>17</b>
<b>7. Special Function</b>	<b>19</b>
7.1 View Closed Applications	19
7.2 Delete Selected Applications	19
7.3 Copy as New Application	20
<b>8. Points to Note</b>	<b>21</b>

# 1. Login to the e-Portal account

Step 1: Please go to <https://eportal.hkcaavq.edu.hk/>

Step 2: Click [LOGIN FOR EXISTING ACCOUNTS](#)

香港學術及職業資歷評審局  
Hong Kong Council for Accreditation of  
Academic & Vocational Qualifications

中文 | Site Map | Contact Us

HOME SYSTEM REQUIREMENTS USEFUL LINKS HELP

**Welcome to the e-Portal**

2016.05.16  
e-Portal service will be launched soon.

Welcome to our e-Portal for accreditation and assessment services!

The e-Portal has been developed to improve the efficiency of HKCAAVQ services by providing operators and course providers with a secure user-friendly online platform to process, check and review the status of their applications and submissions.

The e-Portal provides for the following services:

- Accreditation for academic programmes
- Accreditation for vocational programmes
- Assessment of Continuing Education Fund (CEF) reimbursable courses
- Assessment of Continuing Professional Development (CPD) Programmes

[NEW USERS](#) [LOGIN FOR EXISTING ACCOUNTS](#)

Disclaimer | Privacy Policy

## Step 2: After reading the Disclaimer, click [I Agree](#)

### Disclaimer

Whilst the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ) endeavours to ensure the accuracy of the information on this website, the information is for reference only and is subject to change by HKCAAVQ at any time without prior notice. HKCAAVQ makes no warranties, representations and statements (whether express or implied) of any kind in relation to the information, including any warranties, representations and statements in respect of the accuracy, completeness, timeliness and fitness for a particular purpose of the information. In no circumstances shall the information (or any part thereof) be regarded as professional advice (whether legal or otherwise, and whether general or specific) or a substitute for such.

This website is linked to websites set up by other organisations / bodies / companies. HKCAAVQ expressly states that it has not approved or endorsed the information provided by any other websites linked to this website and HKCAAVQ accepts no responsibility or liability (howsoever caused) for such information.

HKCAAVQ shall not in any circumstances or in any way be liable to any person (including any body of persons, corporate or unincorporated) for any loss or damage (including but not limited to consequential, indirect, incidental and special loss/damage) arising out of or in connection with this website or the websites which are linked to this website, the information on this website or on the websites which are linked to this website, the use of or the inability to use any of such information.

Users are responsible for making their own assessment of the information available on or through this website. Users are advised to verify the information available on or through this website (i.e. by making reference to original publications, legislations, etc.) and obtain independent professional advice (including professional legal advice) before relying on or acting on any of the information.



## Step 3: Enter the Username and Password, click [Login](#)

中文

H K e-Portal A A V Q

 香港學術及職業資歷評審局  
Hong Kong Council for Accreditation of  
Academic & Vocational Qualifications

Username: \*

Password: \*

[Forgot Username or Password?](#)

[Login](#)

[Create New Account](#)

# 2. Create New Application

## Step 1: Click Create New Application

The screenshot shows the user interface of the HKCAAVQ system. At the top, there is a header with the logo and name of the Hong Kong Council for Accreditation of Academic & Vocational Qualifications, along with a user profile section showing 'Welcome CPDUSER4' and a 'Logout' link. Below the header, the 'My Application' section contains a table with columns for Application ID, Service, Type, Scope / Course Title / Reference, Status, Last Update On, and Document Uploaded. The table lists several applications, all with a status of 'Draft'. At the bottom right of the table, there are four buttons: 'View Closed Applications', 'Delete Selected Applications', 'Copy as New Application', and 'Create New Application'. The 'Create New Application' button is circled in red.

## Step 2: Click the pull down button, select "Assessment of CPD Activity", then click Next

### Please Select Service and Type of Application

The screenshot shows the 'Please Select Service and Type of Application' form. The 'Service' dropdown is set to 'The Continuing Professional Development Programme for Insurance Intermediaries (CPD)'. The 'Type of Application' dropdown is open, showing a list of options: 'Change of CPD Activity', 'Change of QF Accredited Learning Programme as CPD activity', 'Assessment of CPD Activity', 'Vetting of QF Accredited Learning Programme as CPD activity', 'Re-assessment of CPD Activity', and 'Renewal of QF Accredited Learning Programme as CPD activity'. A red arrow points to the 'Assessment of CPD Activity' option. The 'Next' button is circled in red.

## Step 3: After reading the Guidelines, please click Next

### Guidelines for The Continuing Professional Development Programme for Insurance Intermediaries (for assessment, re-assessment and change application)

1. This online application is applicable for CPD Activity Provider who wishes to offer both Structured Type 1 Qualified CPD Activities and Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries.
2. For Structured Type 1 Qualified CPD Activities, please read the Guidance Notes on Assessment of Structured Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries available at [www.hkcaavq.edu.hk](http://www.hkcaavq.edu.hk) before you fill in the online application form.
3. For Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries, please read the Guidance Notes on Assessment of Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries available at [www.hkcaavq.edu.hk](http://www.hkcaavq.edu.hk) before you fill in the online application form.
4. Please fill in the required information and upload the supporting documents with completed document checklist when submitting the online application for CPD Services. The checklist of required documents can be found in the online application form.
5. Please settle the assessment fee in accordance with the Fee Schedule. Payment methods are as follows:-
  - a. Bank deposit: please direct deposit the required assessment fee to Industrial and Commercial Bank of China (Asia) Limited a/c No. 072-861-502020073 (Hong Kong Council for Accreditation of Academic and Vocational Qualifications). Please upload the proof of payment with the online application form.
  - b. By cheque: please send the cheque with the printout (after submitting the form) from the online application and made payable to "Hong Kong Council for Accreditation of Academic and Vocational Qualifications" by post.
6. A receipt will be issued to you once HKCAAVQ confirms receipt of the fee payment.
7. Please note that **an application will not be processed if no payment and/or insufficient documents are received by HKCAAVQ.**
8. You may edit the online application form in "My Application" of this e-portal if you wish. Once you press "submit", you cannot edit the information and the status of this application will show as "Review by HKCAAVQ" in "My Application".
9. Upon receiving the required supporting documents and application fee, HKCAAVQ will send you an acknowledgement email and start processing your application.
10. The status of your application could be checked in "My Application" of this e-portal.
11. For enquiries, please contact HKCAAVQ Secretariat at:  
10 Siu Sai Wan Road  
Chai Wan, Hong Kong  
Tel: 3658 0176  
Email: [cpd\\_ja@hkcaavq.edu.hk](mailto:cpd_ja@hkcaavq.edu.hk)

By clicking Next, you agree to the above guideline.



# 3. Fill in the CPD Assessment Online Application Form

**Tips:**

- 1. You may click **Save as Draft** when filling in the form and continue later.
- 2. Please **update the “User Profile” before inputting the information** in an online application form.

## Step 1: Fill in the necessary information

- ❖ For Structured Type 1 Qualified CPD Activity assessment applications, please state the Years of Experience in Organising the Structured CPD Activities or Related Activities
- ❖ For Type 1 Qualified E-learning Activity assessment applications, please specify the years of experience in organizing E-learning Programmes/CPD Activities

### CPD Assessment Online Application Form

[Click here](#) to view the notes to activity organisers.

Type of Application:	Assessment of CPD Activity	Created:	26/02/2020 10:24:50
Status:	Draft	Last Update:	26/02/2020 10:24:50
Application ID:	2000010	Submitted:	-

Title of Activity:

English Chinese

### Information about Activity Organiser

Name of Activity Organiser:

Years of Experience in Organising the Structured CPD Activities or Related Activities (for E-learning CPD assessment applications, please specify the years of experience in organising E-learning Programmes/CPD Activities):

Step 2: Click “Add” to add Responsible Persons, and then the box of “Select Contact Person” will be shown.

- ❖ The Contact Person must be entered in “User Profile” before selecting from an online application form
- ❖ The information of Contact Person can be updated in “User Profile”

#### Responsible Persons

Title	Surname	First Name	Organisation	Position	Contact Phone No.	Fax No.	Email	Contact Address	Type
No records found.									

[Delete](#) [Add](#)

**Select Contact Person**

Please update in User Profile if the Contact Person is not found or is outdated.

Please specify Head of Organisation / Department, Person-in-charge and Authorized Contact Person.

Title	Surname	First Name	Position	Contact Phone No.	Fax No.	Email	Contact Address	
<input type="checkbox"/>	Dr	Lee	Kuen Wai	Director	24567896	-	uat_cpd2@hkcaa.vq.edu.hk	Room 2000, Tai Koo Building, 256 Prince Edward Road, Mong Kok, Kowloon
<input type="checkbox"/>	Mr	Wong	Ka Lee	Vice President	24567896	-	uat_cpd2@hkcaa.vq.edu.hk	-
<input type="checkbox"/>	Mr	Yip	Man Chuen	Manager	23456789	-	uat_cpd2@hkcaa.vq.edu.hk	Room 2000, Tai Koo Building, 256 Prince Edward Road, Mong Kok, Kowloon

Type: \*

[Cancel](#) [Save](#)

Step 3: Check the box next to the person you selected, click the pull down button in the “Type”, and click [Save](#)

**Select Contact Person** ✕

Please update in User Profile if the Contact Person is not found or is outdated.

Please specify Head of Organisation / Department, Person-in-charge and Authorized Contact Person.

Title	Surname	First Name	Position	Contact Phone No.	Fax No.	Email	Contact Address	
<input checked="" type="checkbox"/>	Dr	Lee	Kuen Wai	Director	24567896	-	uat_cpd2@hkcaa.vq.edu.hk	Room 2000, Tai Koo Building, 256 Prince Edward Road, Mong Kok, Kowloon
<input type="checkbox"/>	Mr	Wong	Ka Lee	Vice President	24567896	-	uat_cpd2@hkcaa.vq.edu.hk	-
<input type="checkbox"/>	Mr	Yip	Man Chuen	Manager	23456789	-	uat_cpd2@hkcaa.vq.edu.hk	Room 2000, Tai Koo Building, 256 Prince Edward Road, Mong Kok, Kowloon

Type: \*

Authorised Contact Person  
Head of Organisation / Department  
Person-in-charge

[Cancel](#) [Save](#)

## Step 4: Fill in the necessary information

### Information about the Activity

1 Proposed Starting Date:

2 Target Participants:

In-house (employees of CPD Provider)  General Public  Employees of Commissioning Body

Others (Please specify):

3 Number of CPD Hours Applied for:

❖ If the CPD activity has a modular design, please check the box "Yes", then fill in the information under "Add Module" and click **Save**

4 Modular Design:  Yes  No If "Yes", please specify the module(s) below

Module Title	Number of Hours
No records found.	

**Add**

#### Add Module

Module Title: \*

Number of Hours: \*

**Cancel** **Save**

### 5 Duration of the Activity:

days  weeks  months

### 6 Aims and Objectives:

❖ If you are applying for Type 1 Qualified E-learning Activity, please click "Others (Please specify)" and input "E-learning".

### 7 Type of the Activity:

**i** If the CPD activity is "E-learning", please click "Other (Please specify)" and input "E-learning".

Course  Seminar  Workshop  Others (Please specify):

**E-learning**

- ❖ If the CPD activity is under the category of **“Ethics or Regulations”**, please click **“Other disciplines which are directly related to the work of insurance intermediaries (Please specify)”** and input **“Ethics or Regulations”**.
- ❖ For a CPD activity to be approved under the category of **“Ethics or Regulations”**, all the contents of the whole activity should be related to **“Ethics or Regulations”**.

Contents of the Activity:

1. If the CPD activity is under the category of “Ethics or Regulations”, please click “Other disciplines which are directly related to the work of insurance intermediaries (Please specify)”.

2. For a CPD activity to be approved under the category of “Ethics or Regulations”, all the contents of the whole activity should be related to “Ethics or Regulations”.

Local insurance (or related) legislation

Regulatory aspects of insurance practice in Hong Kong

Insurance

Actuarial science

Risk management

Other disciplines which are directly related to the work of insurance intermediaries (Please specify):

Ethics or Regulations

- ❖ For E-learning Activity, please provide the maximum number of participants allowed in the E-learning Activity at the same time.

9 Number of Participants per Activity:

(a) Minimum:

(b) Maximum:

- ❖ For adding address(es), click **Add** and the address(es) you have entered in “User Profile” will be shown, then check the box next to the Address, then click **Add**

10 Addresses of Teaching Venues:

For new venue(s) not previously approved by HKCAAVQ, please upload supporting documents such as floor plan(s), rental agreement(s) and insurance coverage for third party liability.

Venue Address	Venue Capacity
No records found.	

**Add Address** ✕

If you cannot find your address(es) of teaching venue here, please add them in your user profile.

<input checked="" type="checkbox"/> Address	Capacity (for CPD only)
<input checked="" type="checkbox"/> Room 1001, Big Commercial Building, 256 North Point Road, Hong Kong	180

Cancel **Add**

11 Spoken Language of Delivery:

English

Cantonese

Putonghua

12 Language of Printed Materials:

English

Chinese

13 Frequency of the Activity per Year:

14 Are the participants of CPD activity required to complete any examination and/or continuous assessment?

Yes (please complete the following) The passing mark:

No

- ❖ *For Structured Activity, please state the Minimum Appointment Criteria of Instructor.*
- ❖ *For E-learning Activity, please state the Minimum Appointment Criteria of E-learning Administrator/ Instructor.*

## Staff Profile

1 For Structured Activity, please state the Minimum Appointment Criteria of Instructor.

For E-learning Activity, please state the Minimum Appointment Criteria of E-learning Administrator/ Instructor.

2 Person-in-charge:

(a) Name:

(b) Position in the Organisation:

(c) Full-time Position (if different from above):

(d) Experience in Managing or Conducting the Training Course:

(e) Academic Qualifications and Awarding Institutions:

(f) Professional Qualifications and Awarding Institutions:

 Please upload the instructor list.

- ❖ For Structured Activity, please provide the description of Quality Assurance Mechanisms such as internal course approval procedures, attendance monitoring procedure, class observation(s), review meeting(s) on monitoring the CPD activity and follow up participants' feedback.
- ❖ For E-learning Activity, please provide the description of Quality Assurance Mechanisms such as the procedures for the development, approval and review of E-learning Activities, measures to review activity content and monitor e-learning administrators' performance and review meeting(s) on monitoring the CPD activity and follow up participants' feedback.

## Quality Assurance

Any learning activities to meet the aims and objectives?

Quality Assurance Measures. (e.g. attendance monitoring procedures, participant evaluation, class observation, review meeting, train the trainer, etc):

- ❖ If there are any other miscellaneous fees, click **Add** and fill in the information under "Add Miscellaneous Fee", then click **Save**

### Fees and Refund

1  Free of charge  Fee paid by organisation  Fee paid by participants \$

2 Any other miscellaneous fees?  Yes  No If yes, please provide the details below.

Item	Amount
No records found.	

Delete **Add**

#### Add Miscellaneous Fee

Item: \*

Amount: \*

Cancel **Save**

## 4. Upload Supporting Document(s)

Step 1: Please download the checklist by clicking [checklist](#) to check what kinds of relevant documents are needed

- ❖ For Structured Activity, please refer to the Supporting Document Checklist of Application for Assessment of Structured Type 1 Qualified CPD for Licensed Insurance Intermediaries for preparing the documents.
- ❖ The duly completed checklist should be uploaded (as Attachment 12) together with the documents.

### Supporting Document(s)

Please upload supporting documents according to the [checklist](#). The template of instructor list is available here

Document Type	File Name	Uploaded Date / Time
No related documents uploaded.		
		<input type="button" value="Delete"/> <input type="button" value="Upload Documents"/>

#### Application for Assessment of Structured Type 1 Qualified CPD Activity for Licensed Insurance Intermediaries

##### Supporting Document Checklist

Please prepare and upload the following documents to support your application. Failure to provide the following documents may delay the assessment process and affect the assessment outcome.

Please indicate the availability of the documents. The duly completed checklist should be uploaded (as Attachment 12) together with the documents.

Attachment No.	Documents to be uploaded	Availability
1.	Background information about the CPD Activity Provider with organisational chart. <i>(* applicable to first time application / If there are any updates)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
2.	Information of similar activities offered in the past <i>(* applicable to first time application / If there are any updates)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
3.	Copy of Business Registration (BR) / Certificate of Incorporation (CI) <i>(* applicable to first time application / If there are any updates including the expiry date showed in the BR or CI)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
4.	Lesson Plan with Hourly Breakdown; For CPD activity adopting modular design, an outline of all modules including module title, CPD hours, contents and number of modules should be clearly specified.	<input type="checkbox"/> yes
5.	A full set of course materials, seminar handouts, or seminar papers.	<input type="checkbox"/> yes
6.	Floor plan(s), rental agreement(s) and insurance coverage for third party liability and / or other possible evidence of activity venue <i>(* applicable to new venue(s) not previously approved by HKCAAVQ).</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
7.	Profiles of all instructors or presenters including their academic and professional qualifications, and training/industry experience.	<input type="checkbox"/> yes

8.	Sample End-of-Activity Participant Evaluation Form.	<input type="checkbox"/> yes
9.	Sample attendance certificate issued to the CPD participants	<input type="checkbox"/> yes
10.	Description of Quality Assurance Mechanisms such as internal course approval procedures, attendance monitoring procedure, class observation(s), review meeting(s) on monitoring the CPD activity and follow-up participants' feedback.	<input type="checkbox"/> yes <input type="checkbox"/> already stated in the Online Application Form
11.	Sample of assessment paper (Exam or Test) with assessment criteria. <i>(*Where applicable)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
12.	Completed Document Checklist	<input type="checkbox"/> yes

■ END -

- ❖ For E-learning Activity, please refer to the Supporting Document Checklist of Application for Assessment of Type 1 Qualified E-learning Activity for Licensed Insurance Intermediaries for preparing the documents.
- ❖ The duly completed checklist should be uploaded (as Attachment 14) together with the documents.

**Application for  
Assessment of Type 1 Qualified E-Learning Activity  
for Licensed Insurance Intermediaries**

**Supporting Document Checklist**

Please prepare and upload the following documents to support your application. Failure to provide the following documents may delay the assessment process and affect the assessment outcome.

Please indicate the availability of the documents. The duly completed checklist should be uploaded (as Attachment 14) together with the documents.

Attachment No.	Documents to be uploaded	Availability
1.	Background information about the E-learning Activity Provider with organisational chart.  (*applicable to first time application of E-learning Activity / If there are any updates)	<input type="checkbox"/> yes*  <input type="checkbox"/> not applicable
2.	Information of organising E-learning programmes/ CPD activities.  (*applicable to first time application of E-learning Activity / If there are any updates)	<input type="checkbox"/> yes*  <input type="checkbox"/> not applicable
3.	Copy of Business Registration (BR) / Certificate of Incorporation (CI)  (*applicable to first time application / If there are any updates including the expiry date showed in the BR or CI)	<input type="checkbox"/> yes*  <input type="checkbox"/> not applicable
4.	Activity Plan with detailed breakdown; For E-Learning activity adopting modular design, an outline of all modules including module titles, CPD hours, contents and number of modules should be clearly specified.	<input type="checkbox"/> yes*
5.	A full set of instructional materials, e.g. lecture notes, PowerPoint slides and digital media.	<input type="checkbox"/> yes
6.	Floor plan, rental agreement, insurance coverage for third party liability and/or other possible evidence of activity venue.  (*applicable to E-learning Activities with a designated assessment venue).	<input type="checkbox"/> yes*  <input type="checkbox"/> not applicable
7.	Description of secured login and identity authentication system adopted	<input type="checkbox"/> yes

8.	Profiles of all E-learning administrators / instructors including their academic and professional qualifications, and training/industry experience.	<input type="checkbox"/> yes
9.	Sample End-of-Activity Participant Evaluation Form	<input type="checkbox"/> yes
10.	Description of Technical Support Services including roles and responsibilities of respective technical personnel and a range of services provided by different technical personnel and the selection criteria external service providers	<input type="checkbox"/> yes
11.	Sample attendance certificate issued to the CPD participants	<input type="checkbox"/> yes
12.	Description of Quality Assurance Mechanisms such as the procedures for the development, approval and review of E-learning Activities, measures to review activity content and monitor e-learning administrators/instructors' performance and review meeting(s) on monitoring the CPD activity and follow up users' feedback.	<input type="checkbox"/> yes  <input type="checkbox"/> already stated in the Online Application Form
13.	Question bank of EoA/EoM assessment(s) with assessment criteria / model answers	<input type="checkbox"/> yes
14.	Completed Document Checklist	<input type="checkbox"/> yes

■ END –

Step 2: Click **Upload Documents**, then click **Select Files**

❖ You may put a number of files together into a zipped file to upload the document in one go.

### Supporting Document(s)

Please upload supporting documents according to the checklist. The template of instructor list is available here

Document Type	File Name	Uploaded Date / Time
No related documents uploaded.		

**Upload Documents**

### Upload Documents

Document Type: \* Supporting Document

File Name: \* **Select Files**

Cancel Upload

Step 3: When the file(s) are ready for upload, click **Upload**

### Upload Documents

Document Type: \* Supporting Document

File Name: \* **Select Files**

Lesson Plan.pdf (79KB)

Cancel **Upload**

# 5. Payment

- ❖ If you wish to pay by cheque, please send the cheque with the printout of application available after pressing "Submit Application"
- ❖ If you select to settle the payment by bank deposit, please upload the proof of payment with the following steps

## Step 1: Please select the Payment Method by clicking the pull down button

Payment

Assessment Fee: \$8,000.00 Payment Method:

If you select to settle the payment by bank deposit, please upload the proof of payment. If you wish to pay by cheque, please send the cheque with the printout available after pressing 'Submit Application' to HKCAAVQ.

Proof of Payment: -

Choose File to Upload:

Payment Method dropdown menu:  
Bank-Deposit  
Cheque  
Tele-Transfer

## Step 2: Select Bank-Deposit in Payment Method, then click

Payment

Assessment Fee: \$8,000.00 Payment Method:

If you select to settle the payment by bank deposit, please upload the proof of payment. If you wish to pay by cheque, please send the cheque with the printout available after pressing 'Submit Application' to HKCAAVQ.

Proof of Payment: -

Choose File to Upload:

Payment Method dropdown menu:  
Bank-Deposit  
Cheque  
Tele-Transfer

## Step 3: Click

Payment

Assessment Fee: \$8,000.00 Payment Method:

If you select to settle the payment by bank deposit, please upload the proof of payment. If you wish to pay by cheque, please send the cheque with the printout available after pressing 'Submit Application' to HKCAAVQ.

Proof of Payment: -

Choose File to Upload:

File upload area:  
Proof of payment.docx (12KB)

Payment

Assessment Fee: \$8,000.00 Payment Method: Bank-Deposit

If you select to settle the payment by bank deposit, please upload the proof of payment. If you wish to pay by cheque, please send the cheque with the printout available after pressing 'Submit Application' to HKCAAVQ.

Proof of Payment: Proof of payment.docx

Choose File to Upload:

Step 4: If you would like to apply for an Express Service, please click “Apply for an Express Service”, then click .

- ❖ *Additional fee should be paid on top of the original assessment fee at the time when the express service application is accepted by HKCAAVQ.*

## Payment

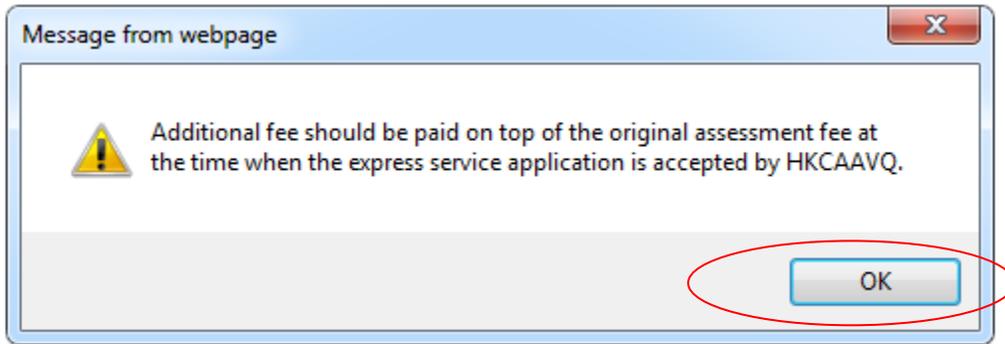
Assessment Fee: \$8,000.00      Payment Method:

Apply for an Express Service

If you select to settle the payment by bank deposit, please upload the proof of payment. If you wish to pay by cheque, please send the cheque with the printout available after pressing 'Submit Application' to HKCAAVQ.

Proof of Payment: -

Choose File to Upload:



# 6. Submit Application

Step 1: Click **Download Application Form**, select your preferred Language and click **Download**. The completed form will be shown for your own record.

## Declaration

I will abide by HKCAAVQ Assessment Criteria, and declare that all the information provided in the application form is accurate to the best of my knowledge. I understand and accept that HKCAAVQ may approach us direct for further information regarding the application. I also understand and accept that a non-refundable assessment fee is charged for the assessment work irrespective of the assessment outcome, and the fees should be made payable in advance to the 'Hong Kong Council for Accreditation of Academic and Vocational Qualifications'.

A person who, either orally or in writing, makes any statement or representation or furnishes any information to HKCAAVQ in connection with the performance of its functions under HKCAAVQ Ordinance (Chapter 1150) which the person knows or reasonably ought to know is misleading or false in a material respect commits an offence and is liable on conviction to a fine at level 5.

I agree with the above declaration

[Submit Application](#)

[Download Application Form](#)

## Select Language

Please select your preferred Language: \*  Chinese  English

[Cancel](#) [Download](#)

The image displays a grid of application form pages. The top row includes the title page, Section A (Applicant Details), and Section B (Information about the Activity). The bottom row includes Section C (Self Profile), Section D (Quality Assessment), and Section E (Declaration). A red circle highlights the 'Download' button on the right side of the grid.

**Step 2: After reading the declaration, check the box next to “I agree with the above declaration”, and press **Submit Application****

### Declaration

I will abide by HKCAAVQ Assessment Criteria, and declare that all the information provided in the application form is accurate to the best of my knowledge. I understand and accept that HKCAAVQ may approach us direct for further information regarding the application. I also understand and accept that a non-refundable assessment fee is charged for the assessment work irrespective of the assessment outcome, and the fees should be made payable in advance to the 'Hong Kong Council for Accreditation of Academic and Vocational Qualifications'.

A person who, either orally or in writing, makes any statement or representation or furnishes any information to HKCAAVQ in connection with the performance of its functions under HKCAAVQ Ordinance (Chapter 1150) which the person knows or reasonably ought to know is misleading or false in a material respect commits an offence and is liable on conviction to a fine at level 5.

agree with the above declaration

**Submit Application**

Download Application Form

Back **Save as Draft**

**Step 3: The message from webpage will be shown, please read the message and click **OK****



**Step 4: The application has been submitted successfully. *If you wish to pay by cheque, please print this page together with the cheque and send to HKCAAVQ.* If you want to edit your application, Click **Back****

### Submit Application

The online application was submitted successfully.

Application ID: 1600100 Submitted: 24/05/2016 16:25:24

Back **Print**

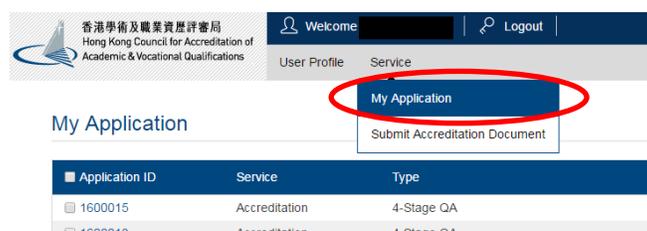
**Step 5: The application you submitted to HKCAAVQ will be shown under “My Application”. The status of the application will be changed to “For Review by HKCAAVQ”.**

### My Application

Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Update On	Document Uploaded
<input type="checkbox"/> 1600100	CPD	Assessment	aaa	For Review by HKCAAVQ	24/05/2016	

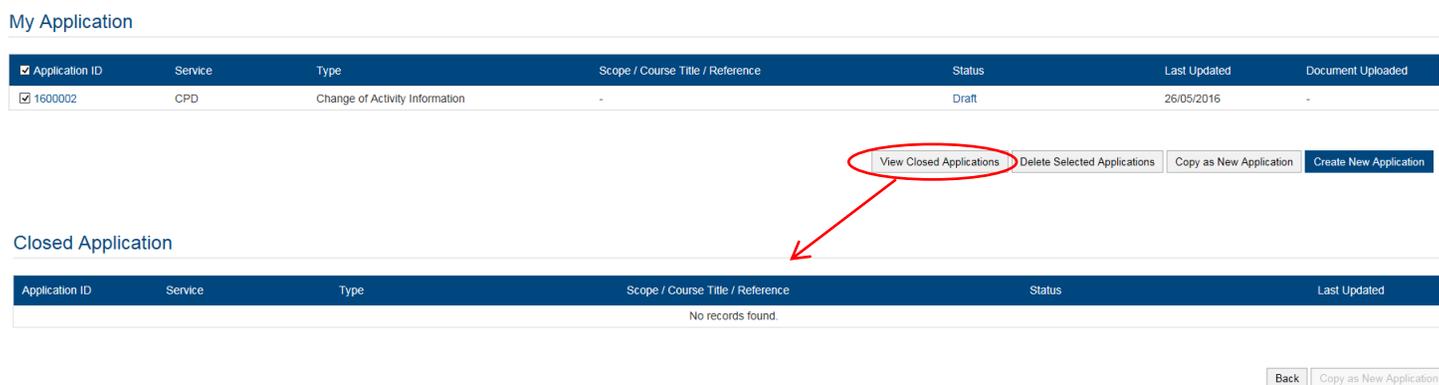
# 7. Special Function

The following functions are under the page of “My Application”.



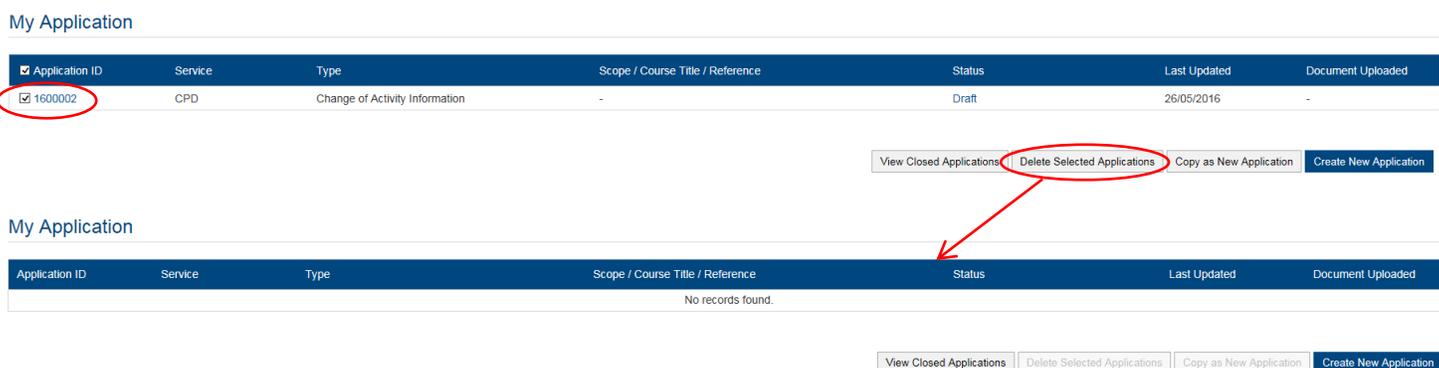
## 7.1 View Closed Applications

**Step 1: Click** View Closed Applications, you may review the completed application(s)



## 7.2 Delete Selected Applications

**Step 1: Check the box next to the application ID, click** Delete Selected Applications, and the application you have selected will be deleted



# 7.3 Copy as New Application

**Step 1: Check the box next to the application ID, click [Copy as New Application](#), the information of the selected application(s) will be copied with different Application ID.**

My Application

<input checked="" type="checkbox"/> Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
<input checked="" type="checkbox"/> 1600002	CPD	Change of Activity Information	-	Draft	26/05/2016	-

[View Closed Applications](#)
[Delete Selected Applications](#)
[Copy as New Application](#)
[Create New Application](#)

My Application

<input type="checkbox"/> Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
<input type="checkbox"/> 1600003	CPD	Change of Activity Information	a	Draft	26/05/2016	-
<input type="checkbox"/> 1600002	CPD	Change of Activity Information	a	For Review by HKCAAVQ	26/05/2016	-

[View Closed Applications](#)
[Delete Selected Applications](#)
[Copy as New Application](#)
[Create New Application](#)

**Step 2: Click the Application ID, and you may edit the necessary information for submitting another application(s)**

My Application

<input type="checkbox"/> Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
<input type="checkbox"/> 1600003	CPD	Change of Activity Information	a	Draft	26/05/2016	-
<input type="checkbox"/> 1600002	CPD	Change of Activity Information	a	For Review by HKCAAVQ	26/05/2016	-

[View Closed Applications](#)
[Delete Selected Applications](#)
[Copy as New Application](#)
[Create New Application](#)

CPD Assessment Online Change Application Form

Click here to view the notes to activity organisers.

Type of Application: Change of CPD Activity      Created: 26/05/2016 14:44:48

Status: Draft      Last Updated: 26/05/2016 14:44:48

Application ID: 1600003      Submitted: -

Name of Activity Organisation: Institute of Financial Planners of Hong Kong

CPD Ref. No.: 00/02/02

Title of Activity: a      English      Chinese

Details of Proposed Changes

Category	Change from	Change to	Effective Date	Reason(s)
<input type="checkbox"/> CPD Hours	1	2	02/05/2016	more ppl

[Delete](#) [Add](#)

Responsible Persons

Title	Surname	First Name	Organisation	Position	Contact Phone No.	Fax No.	Email	Contact Address	Type
<input type="checkbox"/> Mr	a	a	-	-	-	-	-	-	Head of Organisation / Department
<input type="checkbox"/> Ir	b	b	-	-	-	-	-	-	Person-in-charge
<input type="checkbox"/> Ir	b	b	-	-	-	-	-	-	Authorised Contact Person

[Delete](#) [Add](#)

Supporting Document(s)

Please upload supporting documents according to the checklist.

Document Type	File Name	Uploaded Date / Time
No related documents uploaded.		

[Delete](#) [Upload Documents](#)

Declaration

I will abide by HKCAAVQ Assessment Criteria, and declare that all the information provided in the application form is accurate to the best of my knowledge. I understand and accept that HKCAAVQ may approach us direct for further information regarding the application. I also understand and accept that a non-refundable assessment fee is charged for the assessment work irrespective of the assessment outcome, and the fees should be made payable in advance to the Hong Kong Council for Accreditation of Academic and Vocational Qualifications.

A person who, either orally or in writing, makes any statement or representation or furnishes any information to HKCAAVQ in connection with the performance of its functions under HKCAAVQ Ordinance (Chapter 1150) which the person knows or reasonably ought to know is misleading or false in a material respect commits an offence and is liable on conviction to a fine at level 5.

I agree with the above declaration

[Submit Application](#)

[Download Completed Application Form for Your Own Record](#)

[Back](#) [Save as Draft](#)

## 8. Points to Note

---

- The Quick Guide aims to provide a step-by-step guidance for using the e-Portal service. Before submitting the application(s), you should read the related Guidance Notes on Assessment of CPD Activities with Fee Schedule on the HKCAAVQ website at <https://www.hkcaavq.edu.hk/en/services/assessment/cpd-ia-programmes>
- For enquiries, please contact:

Ms Cherie Lau on 3658 0176 or email to [cpd\\_ia@hkcaavq.edu.hk](mailto:cpd_ia@hkcaavq.edu.hk)