

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

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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

Disclaimer

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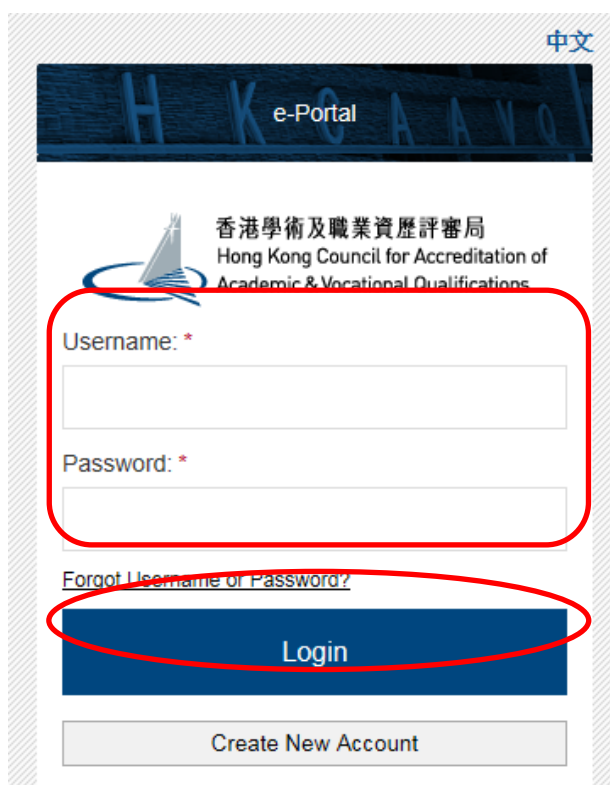
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Users are responsible for making their own assessment of the information available on or through this website. Users are advised to verify the information available on or through this website (i.e. by making reference to original publications, legislations,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



Step 3: Enter the Username and Password, click

The image shows the login page of the HKCAAVQ e-Portal. At the top right is a link for "中文" (Chinese). Below it is a banner with "H K e-Portal C A A V Q". The main header features the HKCAAVQ logo and the text "香港學術及職業資歷評審局" and "Hong Kong Council for Accreditation of Academic & Vocational Qualifications". The login form has two input fields: "Username: *" and "Password: *", both of which are circled in red. Below the password field is a link "Forgot Username or Password?". At the bottom of the form are two buttons: a blue "Login" button and a grey "Create New Account" button, both of which are circled in red.

2. Create New Application

Step 1: Click Create New Application

The screenshot shows the HKCAAVQ user interface. At the top, there is a header with the HKCAAVQ logo and navigation links. Below the header, there is a table titled 'My Application' with columns: Application ID, Service, Type, Scope / Course Title / Reference, Status, Last Update On, and Document Uploaded. The table contains several rows of application data. At the bottom right of the table, there is a button labeled 'Create New Application' which is circled in red.

Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Update On	Document Uploaded
1600085	CPD	Re-assessment	-	Draft	19/05/2016	-
1600078	CPD	Change of Activity Information	-	Draft	17/05/2016	-
1600077	CPD	Change of Activity Information	-	Draft	16/05/2016	-
1600060	CPD	Change of Activity Information	-	Draft	11/05/2016	-
1600032	CPD	Change of Activity Information	-	Draft	10/05/2016	-
1600031	CPD	Change of Activity Information	-	Draft	10/05/2016	-
1600020	CPD	Re-assessment	-	Draft	06/05/2016	-
1600017	CPD	Assessment	-	Draft	06/05/2016	-

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

The screenshot shows the 'Please Select Service and Type of Application' form. The 'Service' field is set to 'The Continuing Professional Development Programme for Insurance Intermediaries (CPD)'. The 'Type of Application' dropdown menu is open, showing several options. The option 'Assessment of CPD Activity' is selected and highlighted with a red arrow. The 'Next' button is also circled in red.

Service: * The Continuing Professional Development Programme for Insurance Intermediaries (CPD)

Type of Application: *

- 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
- Renewal of QF Accredited Learning Programme as CPD activity

Next

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 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 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 Su Sai Wan Road
Chai Wan, Hong Kong
Tel: 3658 0176
Email: cpd_ja@hkcaavq.edu.hk

By clicking Next, you agree to the above guideline.

Next

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:

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.									

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:

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

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 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:
- ⓘ 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 Structured Activity adopting virtual classroom, please input the maximum number of participants per activity for a face-to-face activity.
- ❖ For Structured Activity adopting virtual classroom **ONLY**, please input the maximum number of participants per activity for virtual classroom. .
- ❖ For E-learning Activity, please provide the maximum number of participants per activity 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 Address, then click **Add**
- ❖ For Structured Activity adopting virtual classroom, please add “***virtual classroom***” (**with Asterisk**) and input the maximum number of participants per activity in “User Profile” first, 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

Add Address

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

<input type="checkbox"/> Address	Capacity (for CPD only)
<input type="checkbox"/> *Virtual Classroom*	100
<input type="checkbox"/> 10 Siu Sai Wan Road, Cha	100

« < 1 2 > »

For CPD activity adopting virtual classroom

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 Structured Activity adopting virtual classroom, please also provide the description of Quality Assurance Mechanisms such as the implementation of virtual classroom, attendance monitoring procedure, 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.
- ❖ If the content exceeds the word limit, you may provide this information as attachment.

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.	

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 13) 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.		
		Delete 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 13) together with the documents.

Attachment No.	Documents to be uploaded	Availability
1.	Background information about the CPD Activity Provider with <u>organisational</u> chart. <i>(* applicable to firsttime 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 For application involving virtual classroom, please also provide track records showing at least one qualified CPD activity had completed HKCAAVQ's Reassessment. <i>(* applicable to firsttime 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 firsttime 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 For Structured Activity adopting virtual classroom only and without a designated teaching	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable

1

	venue, please check the box "not applicable". <i>(* applicable to new venue(s) not previously approved by HKCAAVQ).</i>	
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. For Structured Activity adopting virtual classroom, please also provide the detailed arrangements of virtual classroom as a delivery mode, e.g. specific attendance monitoring system, policies / guideline / methods for maintaining integrity and security of participants' data	<input type="checkbox"/> yes <input type="checkbox"/> already stated in the Online Application Form
11.	Description of Technical Support Services <i>(* applicable to Structured Activity adopting virtual classroom)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
12.	Sample of assessment paper (Exam or Test) with assessment criteria. <i>(*Where applicable)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
13.	Completed Document Checklist	<input type="checkbox"/> yes

■ END ■

2

- ❖ 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 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 13) 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 For application involving virtual classroom, please also provide track records showing at least one qualified CPD activity had completed HKCAAVQ's Reassessment. <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 For Structured Activity adopting virtual classroom only and without a designated teaching	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable

1

	venue, please check the box "not applicable". <i>(*applicable to new venue(s) not previously approved by HKCAAVQ).</i>	
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. For Structured Activity adopting virtual classroom, please also provide the detailed arrangements of virtual classroom as a delivery mode, e.g. specific attendance monitoring system, policies / guideline / methods for maintaining integrity and security of participants' data	<input type="checkbox"/> yes <input type="checkbox"/> already stated in the Online Application Form
11.	Description of Technical Support Services <i>(*applicable to Structured Activity adopting virtual classroom)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
12.	Sample of assessment paper (Exam or Test) with assessment criteria. <i>(*Where applicable)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
13.	Completed Document Checklist	<input type="checkbox"/> yes

■ END ■

2

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.		

[Cancel](#) [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: Bank-Deposit
Cheque
Tele-Transfer v

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: Select File

Upload Proof of Payment

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

Select File

Payment

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

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: Select File

Upload Proof of Payment

Step 3: Click

Upload Proof of Payment

Payment

Assessment Fee: \$8,000.00 Payment Method: v

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: Select File

Proof of payment.docx (12KB)

Upload Proof of Payment

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: Select File

Upload Proof of Payment

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

OK

- ❖ *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

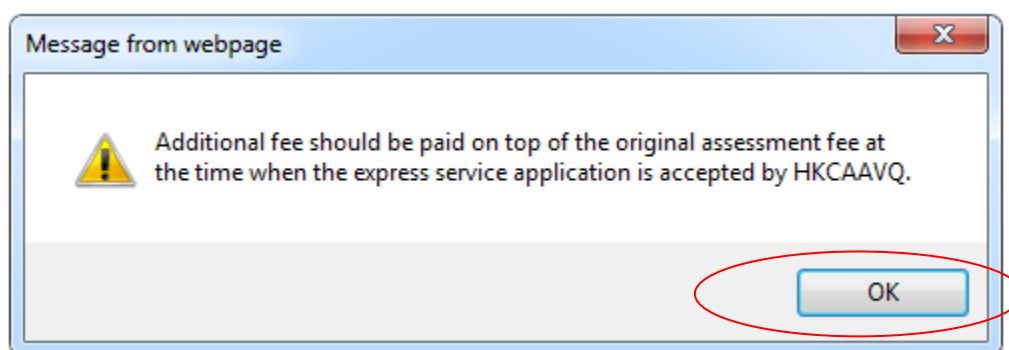
Assessment Fee: \$8,000.00 Payment Method:

☒ 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:



**** (For Structured Activity) ****

Assessment WITHOUT adoption of virtual classroom

Please proceed the payment according to the amount shown in the system.

Assessment WITH adoption of virtual classroom

Due to system limitation, the fee shown in system DOES NOT INCLUDE the assessment fee of adoption of virtual classroom. For the assessment fee amount of adoption of virtual classroom, please refer to the Guidance Notes on Assessment of Structured Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries <https://www.hkcaavq.edu.hk/en/services/assessment/cpd-ia-programmes>.

The amount of assessment fee of adoption virtual classroom will be confirmed via email. Please submit the fee after receiving the confirmation email.

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 collage displays various parts of the application form, including a declaration section, a table for activity details, and several sections for providing information about the activity and quality assurance. A red arrow highlights the 'Download' button from the language selection step, indicating the next step in the process.

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'.

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☒ I agree with the above declaration

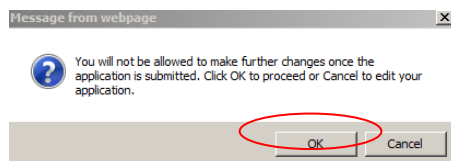
Submit Application

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

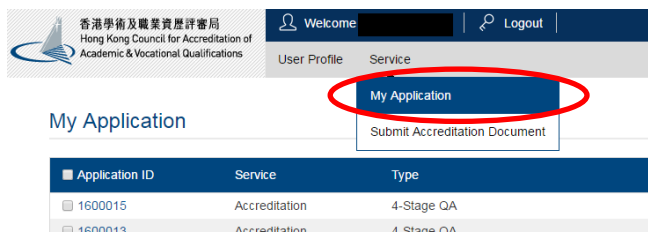
Step 5: The application you submitted to HKCAAVQ will be shown under “My Application”. The status of the application will be changed to “For Review by HKCAAVQ”.

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	

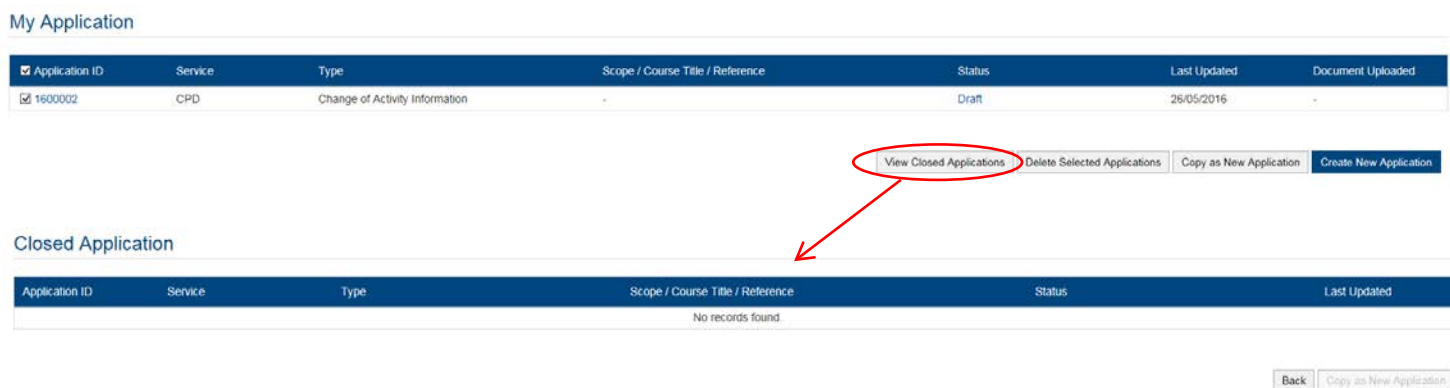
7. Special Function

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



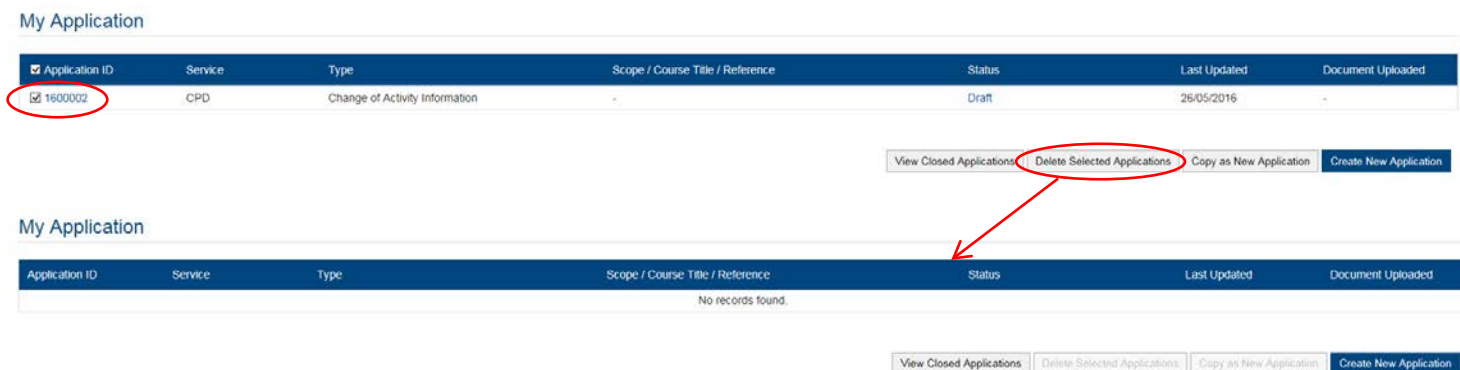
7.1 View Closed Applications

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 checked="" 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 14:44:43
Status:	Draft	Last Updated:	26/05/2016 14:44:43
Application ID:	1600003	Submitted:	-
Name of Activity Organiser:	Institute of Financial Planners of Hong Kong		
CPD Ref. No.:	80/92/02		
Title of Activity:	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		

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

<input type="checkbox"/> 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"/> Mr	b	b	-	-	-	-	-	-	Person-in-charge
<input type="checkbox"/> Mr	b	b	-	-	-	-	-	-	Authorized 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 fee 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 115) 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 Janice SO on 3658 0183 or email to cpd_ia@hkcaavq.edu.hk