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

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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



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



2016.05.16 e-Portal service will be launched soon.

Disclaimer Privacy Policy

Step 3: After reading the Disclaimer, click IAgree

Disclaimer

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Step 4: Enter the Username and Password, click Login



1.1 Update "User Profile"

Step 1: Clic	User Profile				
香港學術》 Hong Kong	及職業資歷評審局 Council for Accreditation of	€ Go Back <u>Ω</u>	Welcome	│	中文
Academic &	Vocational Qualifications	User Profile Servic	e Review Application	System Administration	
User Profile	•				
Username:			Change Passwor	ď	
Name: *	Ms	~			
	Title	Surname	First Na	me	

- Please update the Contact Persons and List of Addresses in "User Profile" before starting the application.
- Only when updated in "User Profile" can contact persons and addresses be shown in the application.

List of Addresses	
The list should include:	
1. Operator administrative address 2. Teaching venue	
Please update the address list before submitting application.	
■ Address	Capacity (For CPD only)
abc	100
	Deleta Add

Contact Persons

The contact in	The contact information of this account will not be automatically added into the list, please add to the list if needed.									
Title	Surname	First Name	Position	Phone No.	Fax No.	Email	Contact Address	Organisation (For CPD only)		
Dr	CHAN	Alan	Principal	12345678		info@abc.com.hk	abc			
Dr	CHAN	Cindy	Vice Principal	12345678	-	info@abc.com.hk	dfd	-		
Dr	CHAN	david	Manager	12345678	÷	info@abc.com.hk	dfd	-		
								Dolot		

2. Create New Application

Step 1: Click Create New Application

Hong Kong Council for A Academic & Vocational Q	ualifications User Prof	file Service				
y Application						
Application ID	Service	Туре	Scope / Course Title / Reference	Status	Last Update On 👻	Document Uploade
] 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	
	CPD	Assessment	-	Draft	06/05/2016	-

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



Step 3: After reading the guidelines, please click Next

application)	
1. This online application is	applicable for CPD activity organiser who wishes to offer CPD activities under the Insurance Intermediaries Quality Assurance Scheme (IIQAS).
2. Please read the Assessn	nent Criteria for the CPD Programme with Fee Schedule available at www.hkcaavo.edu.hk before you fill-in the online application form.
3. Please fill-in the required	information and upload the supporting documents when submitting the online application for IIQAS CPD services. The checklist of required documents can be found in the online application form.
 Please settle the assession 	ment fee in accordance with the Fee Schedule. Payment methods are as follows:-
 Bank deposit: please of payment with the o b. By cheque: please se 	e 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 province application form. end 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.
5. A receipt will be issued to	o you once the HKCAAVQ confirms the payment.
Please note that an appl	lication will not be processed if no payment and/or insufficient documents are received by the HKCAAVQ.
7. You may edit the online a	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 "Review by HKCAAVQ" in "My Application".
3. Upon receiving the requi	red supporting documents and application fee, the HKCAAVQ will send you an acknowledgement email and start processing your application.
9. The status of your applic	ation could be checked in "My Application" of this e-portal.
10. For enquiries, please co 10 Siu Sai Wan Roa Chai Wan, Hong Kor Tel: 3658 0000 Email: info@hkcaavo	ontact the HKCAAVQ Secretariat at:: id ng q.edu.hk
By clicking Next, you agree	to the above guideline.



3. Fill in the CPD Assessment Online Change Application Form

Tips: 1. You may click Save as Draft during the process. The application is temporarily saved and could be retrieved for later editing.

Step 1: Fill in the necessary information

	CPD Assessment Online Change Application Form								
	Click here to view the notes to activity organisers.								
	Type of Application:	Change of CPD Activity	Created:		24/05/2016 17:22:24				
	Status:	Draft	Last Updated:		24/05/2016 17:22:24				
	Application ID:	1600102	Submitted:						
$ \subset $	Name of Activity Organiser:					~			
	CPD Ref. No.:								
	Title of Activity:								
		English		Chinese					

Step 2: Click Add under the Details of Proposed Changes

gory	Change from	Change to	Effective Date	Reason(s)	
		No records found.		ſ	Delet
					Deleti
		Add Proposed Change	×		
		Category: *		<	
		Please specify below for other category:			
		Change from: *	^		
			~		
		Change to: *			
			~		
		Effective Date: *			
		Reason(s): *	^		
			Cance		

Step 3: Click the pull down button and select the category

Category: *	~
Change from: *	Activity Title Adoption of Virtual Classroom Appointment Criteria Change on Virtual Classroom Delivery Arrangement (after approval of adoption of virtual classroom) Course Contents CPD Hours Head of organization / department
Change to: *	Instructor Medium of Instruction Modular design Name of Activity organizer No, of maximum / minimum participants Person-in-Charge/ Instructor Quality Assurance Target Participants
Fee for Change:	Training Venue Others
ffective Date: *	Ē
Reason(s): *	

Remarks:

- I . For Changes of categories other than the above, please select "Others" and specify the details.
- If there are changes involving both in activity contents and CPD hours in on single application, only the highest amount will be charged. Additional charge will also be imposed on the application of adoption of virtual classroom. A nominal fee of HK\$500 is charged for processing a change application other than the above-mentioned categories.

3.1 Structured Activity

Step 1: Fill in the detailed information under the "Add Proposed change"

- Example 1: If you would like to apply for Virtual Classroom as delivery mode, you have to fill in all information requested therein (including but not limited to maximum number of participants, previously application in other approved CPD activity, ratio of administrators to participants, etc.). Then Click Save
- You may also need to upload the relevant documents in support of your application. Please refer to the Checklist.

ad Proposed	Change	2
Category: *	Adoption of Virtual Classroom	~
	Please specify below for other category:	
notes and guideline		
Change from: *		
Change to: *		1
Maximum number of participants: *		
Has the application of virtual classroom been approved in other activity(ies)? *	 Yes, please provide the CPD Reference No. of the latest approved activity: No 	
Ratio of administrators to participants: *		
Virtual Classroom delivery arrangement is not applicable to the module(s):		
Current CPD Hours:	-	
Fee for Adoption of Virtual Classroom:		
Effective Date: *	(iii)	
Reason(s): *		
	Cancel	е

Exapmle 2: If the activity contents will be changed for more than 50% within the same module, the involved module should be replaced by a new module and will be treated as addition of CPD hours. For example, if there is a 60% change in the contents of a module with 2 CPD hours, that module will be treated as a new module and an addition of 2 CPD hours, i.e. HKD\$2,400 will be charged.

Edit Propose	d Change	`
Category: *	CPD Hours Please select "CPD Hours" instead of "Activity Contents".	~
	Please specify below for other category: Then input the CPD hour of the new module.	
Change from: *	13.0 Hour(s)	1
		\sim
Change to: *	Addition of 2.0 Hour(s)	
	Deletion of Hour(s)	
Fee for Change in CPD Hours:	\$2,400.00	
Effective Date: *	16/08/2018	
Reason(s): *	As there is over 50% change in Module X, it will be replaced by this new module of 2 hours.	^
		\sim
	Cancel	ave

Example 3: If you would like to change the number of instructors from 10 to 11, you may fill-in 10 instructors in "Change from" and 11 instructors in "Change to" with the newly added instructor's profile as below and fill-in the Effective Date and Reason(s). Then Click Save

Category: *	Instructor	\checkmark
	Please specify below for other category:	
Change from: *	10 instructors	^
		~
Change to: *	11 instructors	^
		\sim
Effective Date: *	1 1 1	
Reason(s): *		^
		~
		Carcel Save

Step 2: Fill in the information of Responsible Persons

- Click Add to add Responsible Persons, and then the box of "Select Contact Person" will be shown.
- Check the box next to the person you selected, click the pull-down button in the "Type", and click Save. Please add new Contact Person in "User Profile". After completing the details in User Profile, the information of new Contact Person will be shown in the application.

s	urname	First Name	Organisation	Positi	n	Contact Pl	hone No.	Fax No.	E	nail	Contact Address	Туре
						No	o records foun	d.				
			S	elect Conta	ct Person					×		
										<	-	
			0	Please update in U	ser Profile if the Cor	tact Person is	not found or is o	utdated.				
			0	Please specify Hea	d of Organisation / I	epartment, Pe	rson-in-charge a	and Authorized	Contact Person.			
				Title Surnam	First Name	Position	Contact Phone No.	Fax No.	Email	Contact Address		
				venas era i	2011 - 1772 (S. 1.)	2.0. 22				Room 2000, Tai Koo Building, 256		
			E]Dr Lee	Kuen Wal	Director	24567896	10	vq.edu.hk	Prince Edward Road, Mong Kok,		
			-	The Mass	Males	Vice	24667000		uat cpd2@hkcaa	Kowloon		
			L	J Mr wong	RaLee	President	24067895		vq.edu.hk	-		
				TMr Vin	Man Chuen	Manager	23456789		uat_cpd2@hkcaa	Koo Building, 256 Prince Edward		
			L	7.00	mun unuun	manager	20400702		vq.edu.hk	Road, Mong Kok, Kowloon		
				100 t				1000				
				ihe.				~				

Step 3: Check the box next to the person you selected, click the pull down button in the type, and click Save

Please u	Ipdate in User I	Profile if the Cont	act Person is n	ot found or is ou	itdated.		
Please s	pecify Head of	Organisation / D	epartment, Per	son-in-charge a	nd Authorized (Contact Person.	
Title	Surname	First Name	Position	Contact Phone No.	Fax No.	Email	Contact Address
Dr	Lee	Kuen Wai	Director	24567896	-	uat_cpd2@hkcaa vq.edu.hk	Room 2000, Tai Koo Building, 256 Prince Edward Road, Mong Kok, Kowloon
🗆 Mr	Wong	Ka Lee	Vice President	24567896	-	uat_cpd2@hkcaa vq.edu.hk	-
🗆 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: *							

Upload Supporting Document(s)

- Step 1: Please downlaod 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 Change of of Structured Type 1 Qualified CPD Activity for Licensed Insurance Intermediaries for preparing the documents.
 - The duly completed checklist should be uploaded 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 Na	me	Upload Date	/ Time
	No related docum	ents uploaded.	
K			Delete Upload Documents
Plea to p ass Plea be t	<u>Applic</u> <u>Change of Structured Ty</u> <u>for Licensed Insu</u> <u>Supporting Do</u> use prepare and upload the following documents may of provide the following documents may of assenent outcome. ase indicate the availability of the docu- noded to prether with the documents.	cation for (pe 1 Qualified CPD Activity_ Irance Intermediaries_ <u>scument Checklist</u> locuments to support your application. Failure delay the assessment process and affect the uments. The duly completed checklist should	
	Category	Possible Supporting Documents	
•	Name of Activity organizer	Updated Business Registration (BR) or Certificate of Incorporation (CI)	
	Activity Title	Updated lesson plan, updated course	
	CPD Hours	materials, comparison table showing the	
	Course Contents For adoption of virtual classroom, please select this category	difference between the old and the new version. Relevant internal documents	
	Medium of Instruction	For adoption of virtual classroom, please provide the track records showing at least one qualified CPD activity had completed HKCAAVO's Reassessment, updated lesson plan, attendance monitoring system for virtual classroom, description of Technical Support Services, etc.	
	Target Participants	Relevant internal documents	
	Head of organization / department	Relevant internal documents	
<u> </u>	Person-in-Charge/ Instructor	Updated profile	
	Appointment Criteria	Relevant internal documents	
	Training Venue	Floor plan, rental agreement, insurance coverage for third party liability and/or other possible evidence	
•	No. of maximum / minimum participants	Capacity of activity venue	
	Quality Assurance	Quality assurance manual	
	Others:	Relevant supporting documents in relation to the change	
	[END –	

You may put a number of files together into a compressed folder (e.g. zip, rar, 7z) to upload the documents in one go.

lease upload supporting	g documents according to the checklist.			
Document Type		File Name	Uploaded Date / Time	
		No related documents uplo	baded.	
				Delete Uploa
	Upload Documents		×	
	Document Type: *	Supporting Document	\checkmark	
	File Name: *	Select Files		
			Cancel Upload	
			Cancel Upload	
			Cancel Upload	
o 3: Wh	en the file(s) upl	aoded successfully as I	Cancel Upload	
o 3: Wh	en the file(s) up	aoded successfully as l	Cancel Upload	
o 3: Wh	en the file(s) upl	aoded successfully as I	Cancel Upload	
o 3: Wh	en the file(s) up Upload Docur	aoded successfully as I ments	Cancel Upload Delow, click Upload *	
9 3: Wh	en the file(s) upl Upload Docu Document Type: *	aoded successfully as I ments Supporting Document	Cancel Upload Delow, click Upload *	
9 3: Wh	en the file(s) upl Upload Docur Document Type: * File Name: *	aoded successfully as I ments Supporting Document Select Files	Cancel Upload Delow, click Upload X	
o 3: Wh	en the file(s) upl Upload Docur Document Type: * File Name: *	aoded successfully as I ments Supporting Document Select Files Lesson Plan.pdf (79KB)	Cancel Upload Delow, click Upload X	

3.2 E-learning Activity

Step 1: Fill in the detailed information under the "Add Proposed change"

Exapmle 1: If the activity contents will be changed for more than 50% within the same module, the involved module should be replaced by a new module and will be treated as addition of CPD hours. For example, if there is a 60% change in the contents of a module with 2 CPD hours, that module will be treated as a new module and an addition of 2 CPD hours, i.e. HKD\$2,400 will be charged.

Edit Propose	d Change			Tips:	×
Category: *	CPD Hours	K		Please select "CPD Hours" instead of "Activity Contents".	~
	Please specify	below for (other category:	Then input the CPD hour of the new module.	
Change from: *	13.0 Hour(s)				^
		4			\sim
Change to: *	Addition of	2.0	Hour(s)		
	Deletion of		Hour(s)		
Fee for Change in CPD Hours:	\$2,400.00				
Effective Date: *	16/08/2018		ETT.		
Reason(s): *	As there is over hours.	er 50% cha	angein Module≯	ζ it will be replaced by this new module of 2	^
					\sim
				Cancel	Save

Example 2: If you would like to change the number of instructors from 10 to 11, you may fill-in 10 instructors in "Change from" and 11 instructors in "Change to" with the newly added instructor's profile as below and fill-in the Effective Date and Reason(s). Then Click Save

Category: *	Instructor	\checkmark
	Please specify below for other category:	
Change from: *	10 instructors	^
		~
Change to: *	11 instructors	^
		\sim
Effective Date: *	(iiii	
Reason(s): *		^
		\checkmark

Step 2: Fill in the information of Responsible Persons

- Click Add to add Responsible Persons, and then the box of "Select Contact Person" will be shown.
- Check the box next to the person you selected, click the pull-down button in the "Type", and click Save. Please add new Contact Person in "User Profile". After completing the details in User Profile, the information of new Contact Person will be shown in the application.

pol	nsible Persons												
	Surname	First Name	Organisation	Positi	on	Contact Pr	hone No.	Fax No.	E	mail	Contact Address	Туре	
						No	o records four	ıd.					
			S 0	elect Conta Please update in C Please specify He Tree Suman	Ince Person Isser Profile if the Con ed of Organisation / L we First Name Kuen Wai	tact Person is i Department, Pe Position Director	not found or is o irson-in-charge - Contact Phone No 24567896	utdated and Authorized Fax No.	Contact Person. Email uat_cpd2@hkcaa vq_edu.hk	Contact Address Room 2000, Tal Room 2000, Tal Road, Meng Kok, Kowloom	<		Dei
				Mr Wong	Ka Lee	Vice President	24567896	12	uat_cpd2@hkcaa vq.edu.hk	2			
				⊡ 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: *				V		Cancel Seve			

Step 3: Check the box next to the person you selected, click the pull down button in the type, and click **Save**

ricase u	ipdate in User I	Profile if the Cont	act Person is n	ot found or is ou	itdated.		
Please s	pecify Head of	Organisation / D	epartment, Per	son-in-charge a	nd Authorized	Contact Person.	
Title	Surname	First Name	Position	Contact Phone No.	Fax No.	Email	Contact Address
Dr	Lee	Kuen Wai	Director	24567896	-	uat_cpd2@hkcaa vq.edu.hk	Room 2000, Tai Koo Building, 25 Prince Edward Road, Mong Kol Kowloon
Mr	Wong	Ka Lee	Vice President	24567896	-	uat_cpd2@hkcaa vq.edu.hk	-
Mr	Yip	Man Chuen	Manager	23456789	-	uat_cpd2@hkcaa vq.edu.hk	Room 2000, Tai Koo Building, 25 Prince Edward Road, Mong Koł Kowloon

Upload Supporting Document(s)

- Step 1: Please downlaod the checklist by clicking checklist. to check what kinds of relevant documents are needed.
 - ✤ For E-learning Activity, please refer to the Supporting Document Checklist of Application for Change of Type 1 Qualified E-learning Activity for Licensed Insuracne Intermediaries for preparing the documents.
 - * The duly completed checklist should be uploaded together with the documents.

	<u>Applic</u> Change of Type 1 Qua for Licensed Insu	ation for Ilified E-learning Activity_ rance Intermediaries
Pleas to pro asses Pleas be up	Supporting Do se prepare and upload the following d ovide the following documents may o ssment outcome. se indicate the availability of the docu loaded together with the documents.	cument Checklist ocuments to support your application. Failure Itelay the assessment process and affect the uments. The duly completed checklist should
	Category	Possible Supporting Documents
	Name of E-learning Activity Provider	Updated Business Registration (BR) or Certificate of Incorporation (CI)
	E-Learning Activity Title	Updated activity plan, updated course materials, comparison table showing the
	CPD Hours	difference between the old and the new
	Course Contents	version.
	Medium of Instruction	Relevant internal documents
	Target Participants	Relevant internal documents
	Head of organization / department	Relevant internal documents
	Person-in-Charge / E-learning Administrator / Instructor	Updated profile
	Appointment Criteria	Relevant internal documents
	Quality Assurance	Quality assurance manual
	Others:	Relevant supporting documents in relation to the change
	E	END -
then c	lick Select Files	

✤ You may put a number of files together into a compressed folder (e.g. zip, rar, 7z) to upload the documents in one go.

Supporting Doc	cument(s)				
Please upload supporting	documents according to the checklist.				
Document Type		File Name		Uploaded Date / Time	
			No related documents uploaded.		
					Delet Upload Documents
	Upload Docum	nents		×	
	Document Type: *	Supporting Document		Y	
	File Name: *	Select Files			
				Cancel Upload	
			18		

Step 3: When the file(s) uplaoded successfully as below, click Upload

Upload Docume	ents	×
Document Type: *	Supporting Document	V
File Name: *	Select Files	
	Lesson Plan.pdf (79KB)	
		Cancel Upload

4. Payment

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

Payment				
Assessment Fee: If you select to settle the payment by bank deposit, please	\$8,000.00 upload the proof of payment. If you wish to pay by chequ	Payment Method:	Bank-Deposit Cheque	Payment Method
Proof of Payment:	-		Tele-Transfer	
Choose File to Upload:	Select File			

- If you wish to pay by cheque, please send the cheque with the printout available after pressing "Submit Application"
- If you select to settle the payment by bank deposit, please upload the proof of payment with the following Step 2-3

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

Payment				
sessment Fee: ou select to settle the payment by bank of of Payment: oose File to Upload:	\$8,000.00 c deposit, please upload the proof of payment. If you Select File	Payment Method: wish to pay by cheque, please send the cheque with the pri	itout available after f Cheque Tele-Transfer	Payment Method Upload Proof of Paym
tep 3: Click	Upload Proof of Paym	ent		
ssessment Fee:	\$8,000.00	Payment Method:		V
you select to settle the payment by bar proof of Payment:	nk deposit, please upload the proof of payment. If you -	wish to pay by cheque, please send the cheque with the pr	intout available after pressing 'Submit Application' to HKCAAVQ.	
hoose File to Upload:	Select File			
	Proof of payment.docx (12KB)			
Payment				Upload Proof of Paym
	00.000.88	Payment Method:	Desk Deseri	
If you select to settle the payment by ba Proof of Payment:	ink deposit, please upload the proof of payment. If you Proof of payment docx	wish to pay by cheque, please send the cheque with the print	Datix-Depusit out available after pressing 'Submit Application' to HKCAAVQ.	M
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 Expree 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.



5. Submit Application

Step 1: Click Download Completed Application Form for Your Own Record, select your preferred Language and click Download . The form will be shown for your own record.

abide by HKCAAVO Assessment Criteria, and declare that all the information provided in the application form is	accurate to the best of my knowledge. Lunderstand and accent that HKCAAVO may approa	ich us direct for further information renarding the annihilation. Lake understand and account that a new re-
abuse by InCOMVCASeessment Citemat, and declare alta and the minimation portioned in the application of the sessment fee is charged for the assessment voltices, and the fees should be in sessment fee is charged for the assessment voltices, and the fees should be in sessment fee is charged for the assessment voltices, and the fees should be in the set of the assessment voltices. And the fees should be in the set of	acculate to the best on my knowledge. It interstand and acculate to the best on my knowledge. It interstand and acculate to the Mong Kong Council for Accreditation of Academic and Voc made payable in advance to the Mong Kong Council for Accreditation of Academic and Voc AVQ in connection with the performance of its functions under HKCAAVQ Ordinance (Chap	icr to office the during information regarding the application. Laiso understand and accept that a non-re- cational Qualifications'. Ster 1150) which the person knows or reasonably ought to know is misleading or false in a material resp
mits an offence and is liable on conviction to a fine at level 5.		, , , , , , , , , , , , , , , , , , , ,
agree with the above declaration		
bmit Application		
whicad Completed Application Form for Your Own Record		
		Back Save as
7		
Select Language		×
Please select your preferred Language	ge: * O Chinese	
	Cance	Download
	K	
	1	
		SECTION B Responsible Persons Head gr Person-In-Charge (Authorized contact)
Change Application Form	SECTION A Details of Proposed Changes Please search the renorased changes in the following table and provide the relevant	SECTION B Responsible Persons Intel of organization Person-in-Charge (Authorized contact organization) organization person-in-Charge (Authorized contact organization) Name Person-in-Charge (Authorized contact organization)
Change Application Form Type 1 Qualified Continuing Professional Development Activity for Licensed Insurance Intermediaries	SECTION A Details of Proposed Changes Please specify the proposed change(s) in the following table and provide the relevant supporting documents and required fee (f any). Separate sheet(s) may be added if necessary.	SECTION B Responsible Persons Head of organization: department Pation Person-In-Charge Authorized contact person* department Pation Position
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Step 4: The application has been submitted successfully. Click Back

Submit Application				
The online application was submitted successfully.				
Application ID:	1600100	Submitted:	24/05/2016 16:25:24	
				Bak 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 A	pplication						
App	plication ID	Service	Туре	Scope / Course Title / Reference	Status	Last Update On 🐱	Document Uploaded
160	00100	CPD	Change of Activity Information	aaa	For Review by HKCAAVQ	24/05/2016	0

6. Special Function

The following functions are under the page of "My Application".



6.1 View Closed Applications

Step 1:	Click	View Closed Applications	, you may review the	e completed ap	plication(s)	
My Application	ı					
Application ID	Service	Туре	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
I 600002	CPD	Change of Activity Information	-	Draft	26/05/2016	-
Closed Applic	ation			View Closed Applications Delete Selected	I Applications Copy as New Applicat	on Create New Application
Application ID	Service	Туре	Scope / Course Title / Reference	Status		Last Updated
			No records found.			
					E	Copy as New Application

6.2 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

My Application							
Application ID	Service	Туре	Scope / Course Title / Reference	Status	Li	ast Updated [Document Uploaded
100002	CPD	Change of Activity Information	-	Draft	20	6/05/2016 -	
My Application				View Closed Applications	Delete Selected Applications	Copy as New Application	Create New Application
Application ID	Service	Туре	Scope / Course Title / Reference	Status		Last Updated	Document Uploaded
			No records found.				
				View Closed Applications	Delete Selected Applications	Copy as New Application	Create 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.

ation ID Se	rvice	Туре	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
002 CP	D	Change of Activity Information	-	Draft	26/05/2016	-
				View Closed Applications Delete Selected A	Applications Copy as New Applica	aten Create New Application
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My Application Application ID 1600003) Service CPD	Type Change of Activity Information	Scope / Course Title / Reference a	Status Draft	Last Upd 26/05/20	ated × Document U 16 -

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

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7. 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 with Fee Schedule on the HKCAAVQ website at https://www.hkcaavq.edu.hk/en/services/assessment/cpd-ia-programmes
- For enquiries, please contact:

Assessment and Vetting of CPD Activities for Licensed Insurance Intermediaries Contact person: Ms Ann LAM Telephone: 3658 0137 Email: cpd_ia@hkcaavq.edu.hk