

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](#)

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

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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 3: After reading the Disclaimer, click

Disclaimer

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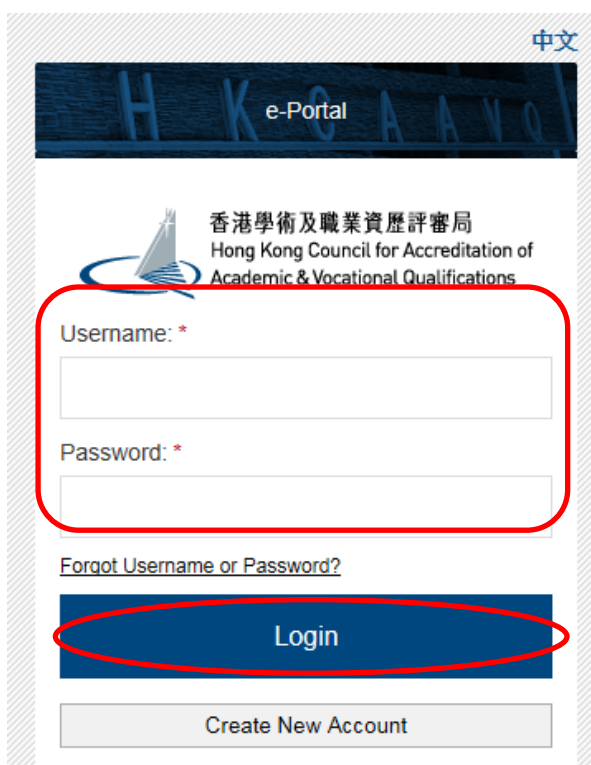
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HKCAAVQ shall not in any circumstances or in any way be liable to any person (including any body of persons, corporate or unincorporated) for any loss or damage (including but not limited to consequential, indirect, incidental and special loss/damage) 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 or acting on any of the information.

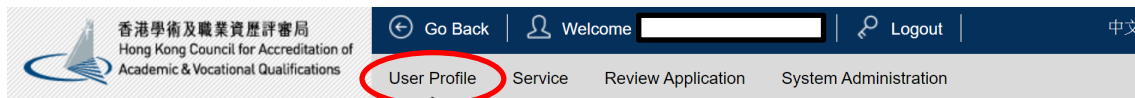


Step 4: Enter the Username and Password, click

The image shows the login page of the HK e-Portal. At the top right, there is a link for "中文" (Chinese). Below it is a banner with the text "H K e-Portal A A V Q". The main header features the logo of the Hong Kong Council for Accreditation of Academic & Vocational Qualifications (HKCAAVQ) and its name in Chinese and English. The login section contains two input fields: "Username: *" and "Password: *", both of which are circled in red. Below these fields is a link for "Forgot Username or Password?". At the bottom of the login section is a large blue "Login" button, also circled in red. Below the login button is a grey button labeled "Create New Account".

1.1 Update “User Profile”

Step 1: Click 



User Profile

Username:

Name: *

Title Surname First Name

- ❖ 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)
<input type="checkbox"/> abc	100

Contact Persons

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)
<input type="checkbox"/> Dr	CHAN	Alan	Principal	12345678	-	info@abc.com.hk	abc	-
<input type="checkbox"/> Dr	CHAN	Cindy	Vice Principal	12345678	-	info@abc.com.hk	dfd	-
<input type="checkbox"/> Dr	CHAN	david	Manager	12345678	-	info@abc.com.hk	dfd	-

2. Create New Application

Step 1: Click **Create New Application**

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

Welcome CPDPUSER4 | Logout | User Profile Service

My Application

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

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

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

Please Select Service and Type of Application

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

Type of Application

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)

- This online application is applicable for CPD activity organiser who wishes to offer CPD activities under the Insurance Intermediaries Quality Assurance Scheme (IIQAS).
 - Please read the Assessment Criteria for the CPD Programme with Fee Schedule available at www.hkcaavq.edu.hk before you fill-in the online application form.
 - 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 assessment fee in accordance with the Fee Schedule. Payment methods are as follows:-
 - 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.
 - 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.
 - A receipt will be issued to you once the HKCAAVQ confirms the payment.
 - Please note that **an application will not be processed if no payment and/or insufficient documents are received by the HKCAAVQ.**
 - 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 "Review by HKCAAVQ" in "My Application".
 - Upon receiving the required supporting documents and application fee, the HKCAAVQ will send you an acknowledgement email and start processing your application.
 - The status of your application could be checked in "My Application" of this e-portal.
 - For enquiries, please contact the HKCAAVQ Secretariat at:
10 Siu Sai Wan Road
Chai Wan, Hong Kong
Tel: 3658 0000
Email: info@hkcaavq.edu.hk
- By clicking Next, you agree to the above guideline.

Next

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:-

Name of Activity Organiser:

CPD Ref. No.:

Title of Activity:

EnglishChinese

Step 2: Click **Add** under the Details of Proposed Changes

Details of Proposed Changes

Category	Change from	Change to	Effective Date	Reason(s)
No records found.				

Details of Proposed Changes

Add

Add Proposed Change

Category: *

Change from: *

Change to: *

Effective Date: *


Reason(s): *

Cancel

Save

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


Add Proposed Change ✕

Category: * 

Change from: *

Change to: *

Fee for Change:

Effective Date: * 

Reason(s): *

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

Instructor

Medium of Instruction

Modular design

Name of Activity organizer

No. of maximum / minimum participants



Person-in-Charge/ Instructor

Quality Assurance

Target Participants

Training Venue

Others

Remarks:

1. For Changes of categories other than the above, please select "Others" and specify the details.
2. 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.*

Add Proposed Change

Category: *

Adoption of Virtual Classroom

▼

Please specify below for other category:

notes and guideline

Change from: *

Change to: *

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: *


Reason(s): *

Cancel

Save

- ❖ *Example 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 Proposed Change

Category: * 

Please specify below for other category:


Change from: *

Change to: *

Addition of Hour(s)

Deletion of Hour(s)

Fee for Change in CPD Hours: \$2,400.00

Effective Date: * 

Reason(s): *

Tips:
Please select "CPD Hours" instead of "Activity Contents". Then input the CPD hour of the new module.

- ❖ **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**

Add Proposed Change

Category: * Instructor

Please specify below for other category:

Change from: * 10 instructors

Change to: * 11 instructors

Effective Date: *

Reason(s): *

Cancel **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.

Responsible Persons

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

Done **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_cp02@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_cp02@hkcaa vq.edu.hk	-
<input type="checkbox"/> Mr	Yip	Man Chuen	Manager	23456789	-	uat_cp02@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: *

Authorized Contact Person

Head of Organisation / Department

Person-in-charge

Cancel

Save

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 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 Name	Upload Date / Time
No related documents uploaded.		
<div> Delete Upload Documents </div>		

Application for Change 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 together with the documents.

Category	Possible Supporting Documents
<input type="checkbox"/> Name of Activity organizer	Updated Business Registration (BR) or Certificate of Incorporation (CI)
<input type="checkbox"/> Activity Title	Updated lesson plan, updated course materials, comparison table showing the difference between the old and the new version.
<input type="checkbox"/> CPD Hours	
<input type="checkbox"/> Course Contents	Relevant internal documents
For adoption of virtual classroom, please select this category	
<input type="checkbox"/> Medium of Instruction	For adoption of virtual classroom, please provide the track records showing at least one qualified CPD activity had completed HKCAAVQ's Reassessment, updated lesson plan, attendance monitoring system for virtual classroom, description of Technical Support Services, etc.
<input type="checkbox"/> Target Participants	Relevant internal documents
<input type="checkbox"/> Head of organization / department	Relevant internal documents
<input type="checkbox"/> Person-in-Charge/ Instructor	Updated profile
<input type="checkbox"/> Appointment Criteria	Relevant internal documents
<input type="checkbox"/> Training Venue	Floor plan, rental agreement, insurance coverage for third party liability and/or other possible evidence
<input type="checkbox"/> No. of maximum / minimum participants	Capacity of activity venue
<input type="checkbox"/> Quality Assurance	Quality assurance manual
<input type="checkbox"/> Others:	Relevant supporting documents in relation to the change

-- END --

Step 2: Click **Upload Documents** , then click **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 Document(s)

Please upload supporting documents according to the checklist.

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

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

Upload Documents

Document Type: *

Supporting Document

File Name: *

Select Files

[Cancel](#) **Upload**

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

Upload Documents

Document Type: *

Supporting Document

File Name: *

Select Files

Lesson Plan.pdf (79KB)

[Cancel](#) **Upload**

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 Proposed Change

Category: * CPD Hours

Please specify below for other category:

Change from: * 13.0 Hour(s)

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.

Cancel Save

Tips:
Please select “CPD Hours” instead of “Activity Contents”. Then input the CPD hour of the new module.

- ❖ **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**

Add Proposed Change

Category: * Instructor

Please specify below for other category:

Change from: * 10 instructors

Change to: * 11 instructors

Effective Date: *

Reason(s): *

Cancel **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.

Responsible Persons

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

Done **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_cp02@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_cp02@hkcaa vq.edu.hk	-
<input type="checkbox"/> Mr	Yip	Man Chuen	Manager	23456789	-	uat_cp02@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

Upload Supporting Document(s)

Step 1: Please download 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 Insurance Intermediaries for preparing the documents.*
- ❖ *The duly completed checklist should be uploaded together with the documents.*

Application for
Change 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 together with the documents.

Category	Possible Supporting Documents
<input type="checkbox"/> Name of E-learning Activity Provider	Updated Business Registration (BR) or Certificate of Incorporation (CI)
<input type="checkbox"/> E-Learning Activity Title	Updated activity plan, updated course materials, comparison table showing the difference between the old and the new version.
<input type="checkbox"/> CPD Hours	
<input type="checkbox"/> Course Contents	
<input type="checkbox"/> Medium of Instruction	Relevant internal documents
<input type="checkbox"/> Target Participants	Relevant internal documents
<input type="checkbox"/> Head of organization / department	Relevant internal documents
<input type="checkbox"/> Person-in-Charge / E-learning Administrator / Instructor	Updated profile
<input type="checkbox"/> Appointment Criteria	Relevant internal documents
<input type="checkbox"/> Quality Assurance	Quality assurance manual
<input type="checkbox"/> Others:	Relevant supporting documents in relation to the change

-- END --

Step 2: Click [Upload Documents](#) , then click [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 Document(s)

Please upload supporting documents according to the checklist.

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

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

Upload Documents

Document Type: *

Supporting Document

File Name: *

[Select Files](#)

[Cancel](#) [Upload](#)

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

Upload Documents ✕

Document Type: *

Supporting Document ▼

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: \$8,000.00 Payment Method: Bank-Deposit
Cheque
Tele-Transfer 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: Select File Upload Proof of Payment

- ❖ 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

Assessment Fee: \$8,000.00 Payment Method: Bank-Deposit
Cheque
Tele-Transfer 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: Select File Upload Proof of Payment

Step 3: Click Upload Proof of Payment

Assessment Fee: \$8,000.00 Payment Method: Bank-Deposit
Cheque
Tele-Transfer 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: Select File Upload Proof of Payment

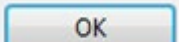
Payment

Assessment Fee: \$8,000.00 Payment Method: Bank-Deposit 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: Proof of payment.docx (12KB) Upload Proof of Payment

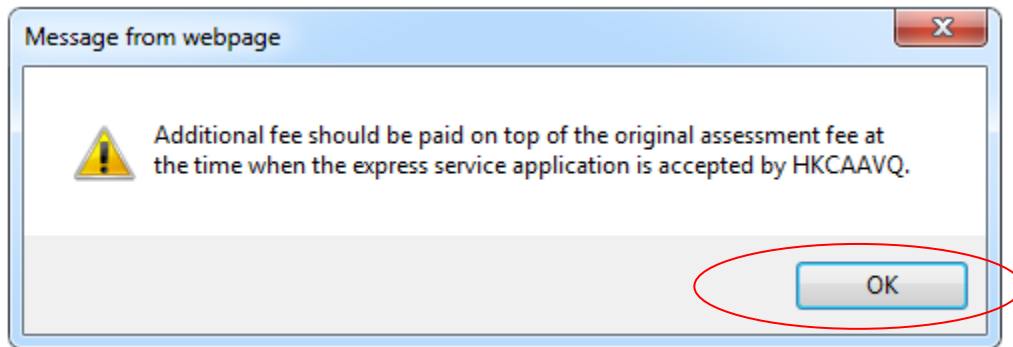
Choose File to Upload: Select File

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:	<input type="text"/>
<input checked="" type="checkbox"/> 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:	<input type="button" value="Select File"/>		



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.

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](#)

Select Language

Please select your preferred Language: * ☐ Chinese ☒ English

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<p>Change Application Form Type 1 Qualified Continuing Professional Development Activity for Licensed Insurance Intermediaries (Version: April 2022)</p> <p>This generated application form for Change of a structured CPD activity or E-learning activity serves for record purpose only. Please submit the online application form via e-Portal directly.</p> <p>Please refer to Chapter 5 of the "Guidance Notes on Assessment of Structured Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries" and the "Guidance Notes on Assessment of Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries" for a document checklist and prepare the necessary supplementary documents for the application.</p> <p>Title of activity: _____</p> <p>CPD Ref. No.: _____</p> <p>Name of activity organizer: _____</p>	<p>SECTION A Details of Proposed Changes</p> <p>Please specify the proposed change(s) in the following table and provide the relevant supporting documents and required fee (if any). Separate sheet(s) may be added if necessary.</p> <p>Please refer to the supporting documents checklist for Change Application for more information.</p>	<p>SECTION B Responsible Persons</p> <table border="1"><thead><tr><th></th><th>Head of organization/department</th><th>Person-in-Charge</th><th>Authorized contact person*</th></tr></thead><tbody><tr><td>Name</td><td></td><td></td><td></td></tr><tr><td>Position</td><td></td><td></td><td></td></tr><tr><td>Organisation</td><td></td><td></td><td></td></tr><tr><td>Address</td><td></td><td></td><td></td></tr><tr><td>Phone</td><td></td><td></td><td></td></tr><tr><td>Fax</td><td></td><td></td><td></td></tr><tr><td>E-mail address</td><td></td><td></td><td></td></tr></tbody></table> <p><small>*The HKCAAVQ will direct inquiries about the application to the authorized contact person, whose name and phone number will be put on the HKCAAVQ Website for approved CPD activities open to the public. Please inform the HKCAAVQ when there are changes in the above information.</small></p> <p>SECTION C Declaration by the Authorised Person-in-charge</p> <p><input type="checkbox"/> I declare that all the information provided in the Assessment Change Application Form is accurate to the best of my knowledge. I understand and accept that the HKCAAVQ may approach us directly for further information regarding the application. I also understand and accept that a non-refundable fee (if any) is charged for the change application irrespective of the outcome.</p> <p>A person who, either orally or in writing, makes any statement or representation or furnishes any information to the HKCAAVQ in connection with the performance of its functions under the 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.</p> <p>Name: _____</p> <p>Post: _____</p> <p>Date: _____</p>		Head of organization/department	Person-in-Charge	Authorized contact person*	Name				Position				Organisation				Address				Phone				Fax				E-mail address			
	Head of organization/department	Person-in-Charge	Authorized contact person*																															
Name																																		
Position																																		
Organisation																																		
Address																																		
Phone																																		
Fax																																		
E-mail address																																		

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.

☒ I agree with the above declaration

Submit Application

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

Message from webpage

?

You will not be allowed to make further changes once the application is submitted. Click OK to proceed or Cancel to edit your application.

OK Cancel

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

Back **Print**

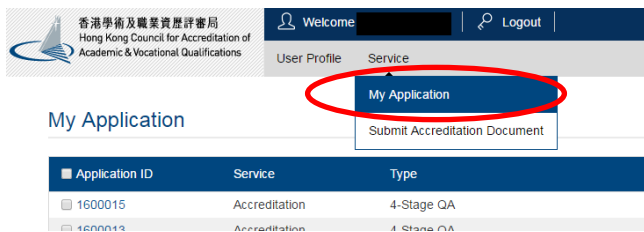
Step 5: The application you submitted to HKCAAVQ will be shown under “My Application”. The status of the application will be changed to “For Review by HKCAAVQ”

My Application

Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Update On	Document Uploaded
1600100	CPD	Change of Activity Information	aaa	For Review by HKCAAVQ	24/05/2016	

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 completed application(s)

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](#)

Closed Application

Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated
No records found.					

[Back](#) [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

<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

Application ID	Service	Type	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](#)

6.3 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.:	8092/02		
Title of Activity:	<div>a</div> <div>English</div> <div>Chinese</div>		

Details of Proposed Changes

Category	Change from	Change to	Effective Date	Reason(s)
<input type="checkbox"/> CPD Hours	1	2	02/05/2018	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'.

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☐ I agree with the above declaration

[Submit Application](#)

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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/assessment/CPD_IA_prog/.
- 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