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

Step 3: After reading the Disclaimer, click I Agree

Disclaimer

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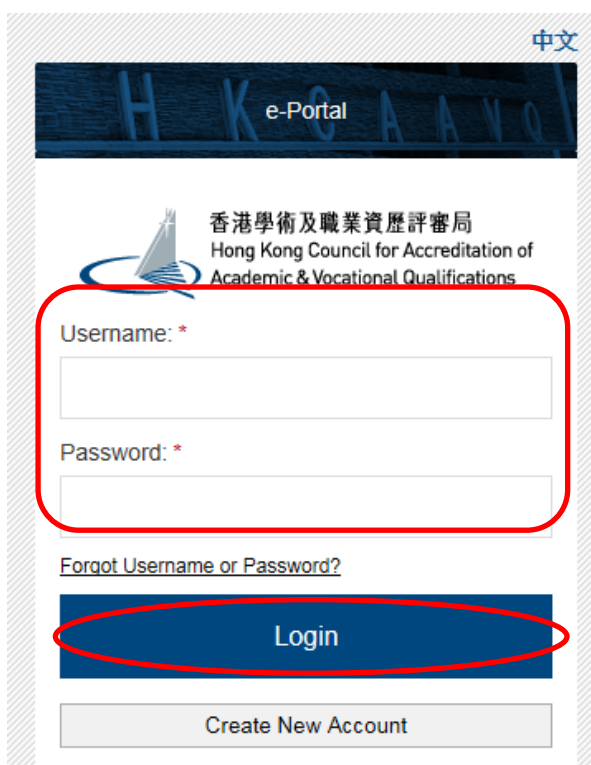
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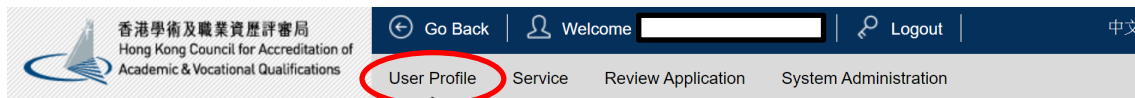
I Agree

Step 4: Enter the Username and Password, click Login

中文

e-Portal

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

Username: *

Password: *

Forgot Username or Password?

Login

Create New Account

1.1 Update "User Profile"

Step 1: Click User Profile

❖ *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

Delete   **Add**

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)
☐ 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	-

Delete   **Add**

2. Create New Application

Step 1: Click **Create New Application**

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

Step 3: After reading the guidelines, please click **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

Step 2: Click [Add] under the Details of Proposed Changes

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

Add Proposed Change

Category: *

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

Change from: *

Change to: *

Fee for Change:

Effective Date: *

Reason(s): *

Cancel   Save

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.*

❖ *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 Proposed Change

Category: * CPD Hours

Please specify below for other category:

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

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

❖ *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

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.*

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

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 Name	Upload Date / Time
	No related documents uploaded.	

Delete Upload Documents

**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
☐	Name of Activity organizer	Updated Business Registration (BR) or Certificate of Incorporation (CI)
☐	Activity Title	Updated lesson plan, updated course materials, comparison table showing the difference between the old and the new version.
☐	CPD Hours	
☐	Course Contents For adoption of virtual classroom, please select this category	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 HKCAAVQ'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
☐	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 –

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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**

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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.

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

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

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.*

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

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.*

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
☐	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 difference between the old and the new version.
☐	CPD Hours	
☐	Course Contents	
☐	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

-- 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

- ❖ *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

Step 3: Click 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 [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.

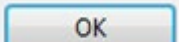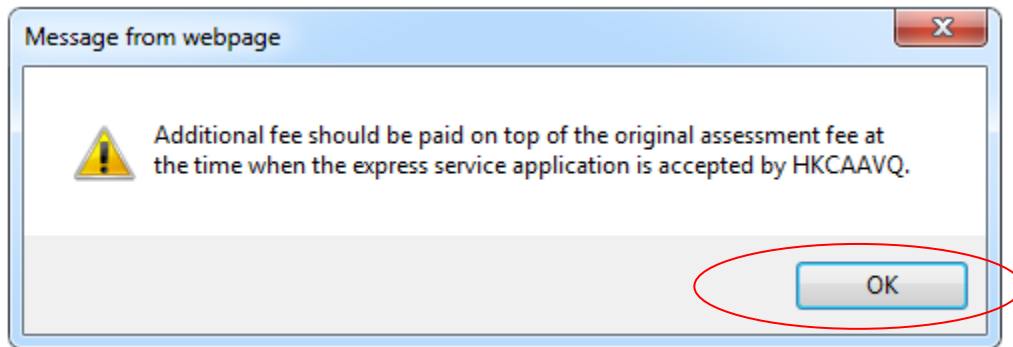Proof of Payment: -

Choose File to Upload: [Select File]

Message from webpage   ✕

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

[OK]

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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.

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

Download Completed Application Form for Your Own Record

Back   Save as Draft

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	Assessment Change of Activity Information	aaa	For Review by HKCAAVQ	24/05/2016	⊕

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6. Special Function

The following functions are under the page of "My Application".
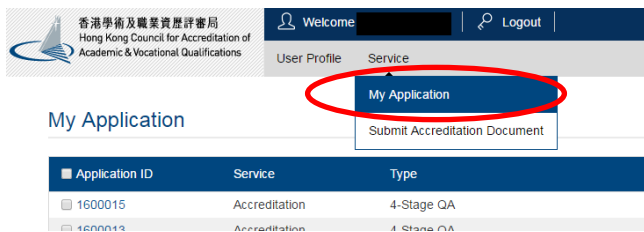
6.1 View Closed Applications

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

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

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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

☑ Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
☑ 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
☐ 1600003	CPD	Change of Activity Information	a	Draft	26/05/2016	-
☐ 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

☐ Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated ⌄	Document Uploaded
☐ 1600003	CPD	Change of Activity Information	a	Draft	26/05/2016	-
☐ 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 Organiser:	Institute of Financial Planners of Hong Kong		
CPD Ref. No.:	80/92/02		
Title of Activity:	a		
	English		Chinese

Details of Proposed Changes

☐ Category	Change from	Change to	Effective Date	Reason(s)
☐ CPD Hours	1	2	02/05/2016	more ppl

[Delete] [Add]

Responsible Persons

☐ Title	Surname	First Name	Organisation	Position	Contact Phone No.	Fax No.	Email	Contact Address	Type
☐ Mr	a	a	-	-	-	-	-	-	Head of Organisation / Department
☐ Ir	b	b	-	-	-	-	-	-	Person-in-charge
☐ Ir	b	b	-	-	-	-	-	-	Authorised Contact Person

[Delete] [Add]

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

[Delete] [Upload Documents]

Declaration

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

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

☐ I agree with the above declaration

[Submit Application]

[Download Completed Application Form for Your Own Record]

[Back] [Save as Draft]

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