

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

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1. Login to the e-Portal account

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

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

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

中文 | Site Map | Contact Us

HOME | SYSTEM REQUIREMENTS | USEFUL LINKS | HELP

Welcome to the e-Portal

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](#)

2016.05.16
e-Portal service will be launched soon.

Disclaimer | Privacy Policy

Step 3: After reading the Disclaimer, click [I Agree](#)

Disclaimer

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

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

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


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



Step 4: Enter the Username and Password, click [Login](#)

中文

H K e-Portal C A A V Q

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

Username: *

Password: *

[Forgot Username or Password?](#)

[Login](#)

[Create New Account](#)

2. Create New Application

Step 1: Click Create New Application

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

Welcome CPDUSER4 | 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: *

Type of Application: *

The Continuing Professional Development Programme for Insurance Intermediaries (CPD)

☒ 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 Provider who wishes to offer both Structured Type 1 Qualified CPD Activities and Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries.
- For Structured Type 1 Qualified CPD Activities, please read the Guidance Notes on Assessment of Structured Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries available at www.hkcaavq.edu.hk before you fill in the online application form.
- For Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries, please read the Guidance Notes on Assessment of Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries available at www.hkcaavq.edu.hk before you fill in the online application form.
- Please fill in the required information and upload the supporting documents with completed document checklist when submitting the online application for CPD Services. The checklist of required documents can be found in the online application form.
- 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 HKCAAVQ confirms receipt of the fee payment.
- Please note that **an application will not be processed if no payment and/or insufficient documents are received by 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 as "Review by HKCAAVQ" in "My Application".
- Upon receiving the required supporting documents and application fee, 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 HKCAAVQ Secretariat at:
10 Siu Sai Wan Road
Chai Wan, Hong Kong
Tel: 3658 0176
Email: cpd_ia@hkcaavq.edu.hk

By clicking Next, you agree to the above guideline.

[Next](#)

3. Fill in the CPD Assessment Online Change Application Form

Step 1: Fill in the necessary information

Tips:

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

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: | <input type="text"/> | | |
| CPD Ref. No.: | <input type="text"/> | | |
| Title of Activity: | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| | English | Chinese | |

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. | | | | |

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

Add Proposed Change

Category: *

Please specify below for other category:

Change from: *

Change to: *

Effective Date: *

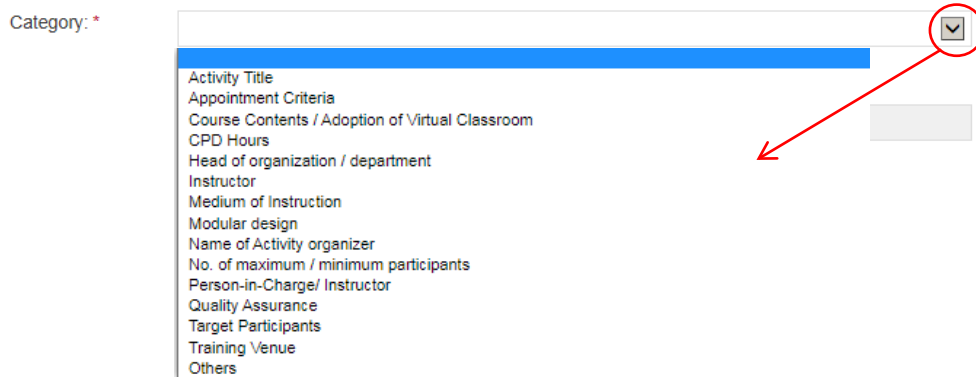
Reason(s): *

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

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

Category: *

Activity Title
Appointment Criteria
Course Contents / Adoption of Virtual Classroom
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. If there are changes involving both in activity contents and CPD hours in one single application, only the highest amount will be charged. A nominal fee of HK\$500 is charged for processing a change application other than activity contents and CPD hours.
2. For Changes of categories other than the above, please select "Others" and specify the details.
3. For applying for Virtual Classroom, please select "Course Contents/Adoption of Virtual Classroom" and state "Adoption of Virtual Classroom".

Step 4: Fill in the detailed information under the "Add Proposed change"

- ❖ *Example 1: If you would like to applying for Virtual Classroom as delivery mode, you may fill in N/A in "Change from" and "Reason(s)", Adoption of Virtual Classroom in "Change to" as below, and provide the maximum number of participants per activity. 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: * Course Contents / Adoption of Virtual Classroom

Please specify below for other category:

• If there is a change in activity contents involving 21% to 50% of a module (if applicable) or the whole CPD activity (for non-modular design activities), an application for changes is required and additional fee will be charged.

• If you would like to applying for Virtual Classroom as delivery mode, you may fill in N/A in "Change from" and Adoption of Virtual Classroom in "Change to" as below, and provide the Reason(s) and the maximum number of participants per activity.

Change from: * N/A

Change to: * Adoption of Virtual Classroom

Current CPD Hours: 7.0

Fee for Change in Activity Content: \$2,100.00

Effective Date: *

Reason(s): * N/A

Cancel Save

- ❖ *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:

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 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: * ▼

Please specify below for other category:

Change from: * ▲▼

Change to: * ▲▼

Effective Date: * 📅

Reason(s): * ▲▼

Step 5: Click **Add** to add Responsible Persons, and then the box of “Select Contact Person” will be shown.

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

Responsible Persons

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

Select Contact Person

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

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

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

Type:

Step 6: 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

4. Upload Supporting Document(s)

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

- ❖ For Structured Activity, please refer to the Supporting Document Checklist of Application for Re-assessment of Structured Type 1 Qualified CPD 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](#).

| Document Type | File Name | Uploaded 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 | |
| For adoption of virtual classroom, please select this category | Relevant internal documents |
| <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 --

1

- ❖ For E-learning Activity, please refer to the Supporting Document Checklist of Application for Re-assessment 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 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 --
1

Step 2: Click Upload Documents , then click Select Files

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

Upload Documents

Document Type: *
Supporting Document

File Name: *
Select Files

Cancel Upload

Delete

Upload Documents

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

5. 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

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

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

Proof of Payment: -

Choose File to Upload: Select File

Upload Proof of Payment

Step 3: Click Upload Proof of Payment

Payment

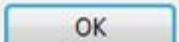
Assessment Fee: \$8,000.00 Payment Method: Bank-Deposit

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

Proof of Payment: Proof of payment.docx (12KB)

Choose File to Upload: Select File

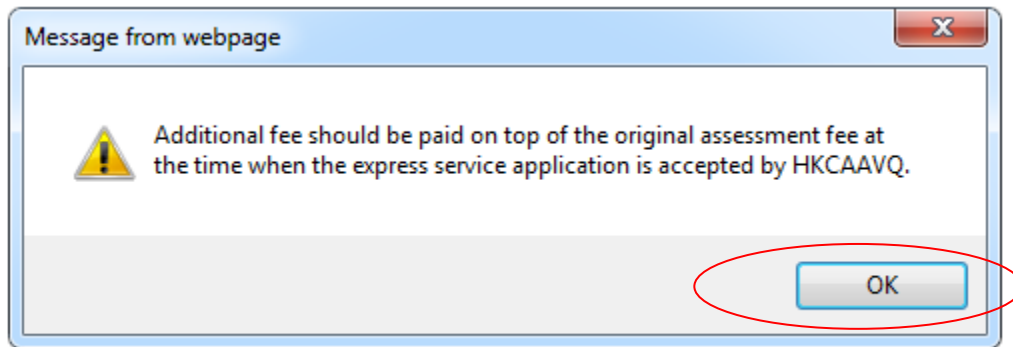
Upload Proof of Payment

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

- ❖ *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"/> | | |



6. Submit Application

Step 1: Click [Download Application Form](#) , 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 Application Form](#)

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

Select Language

Please select your preferred Language: * ☐ Chinese ☒ English

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

Change Application Form

The Continuing Professional Development Programme for Insurance Intermediaries

June 2015

Approved Continuing Professional Development (CPD) Programmes under the Insurance Intermediaries Quality Assurance Scheme (IIQAS) are required to seek prior approval from the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ) for any significant changes during the approval period. If the change request is considered to be substantial such as involving over 30% of additional course content or CPD hours, the HKCAAVQ may impose a surcharge equivalent to 50% of there-assessment fee.

The HKCAAVQ will not return the application form and any documents received to the activity organiser regardless of the outcome. Any personal data required in this form will be used only for the purpose of applying for change(s). Please note that according to the Personal Data (Privacy) Ordinance (Cap 486), any person whose personal data is provided has the right of access to and correction of the personal data.

To apply for Change of CPD Programmes for Insurance Intermediaries, please fill-in the required information and upload the supporting documents when submitting this Online Application Form. A surcharge will be collected when it is considered as substantial change and HKCAAVQ will inform you to make the necessary payment after your submission.

Please refer to the Assessment Criteria when filling in the form

Title of activity: _____

CPD Ref. No.: _____

Name of activity organizer: MILC (Hong Kong) Limited

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 (if any). Separate sheet(s) may be added if necessary.

Please refer to the supporting documents checklist for Change Application for more information.

SECTION B Responsible Persons

| | Head of organization/ department | Person-in-Charge | Authorized contact person* |
|----------------|----------------------------------|------------------|----------------------------|
| Name | | | |
| Position | | | |
| Organisation | | | |
| Address | | | |
| Phone | | | |
| Fax | | | |
| E-mail address | | | |

* 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.

SECTION C Declaration by the Authorised Person-in-charge

☐ 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.

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.

Name _____

Post _____

Date _____

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 Application Form

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**

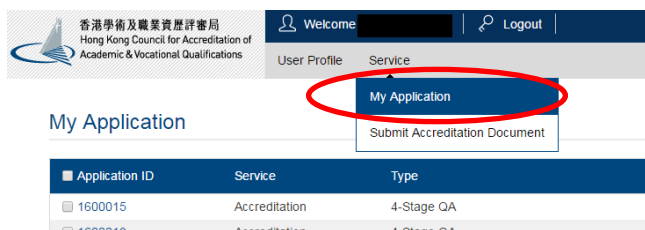
Step 5: The application you submitted to HKCAAVQ will be shown under “My Application”. The status of the application will be changed to “For Review by HKCAAVQ”

My Application

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

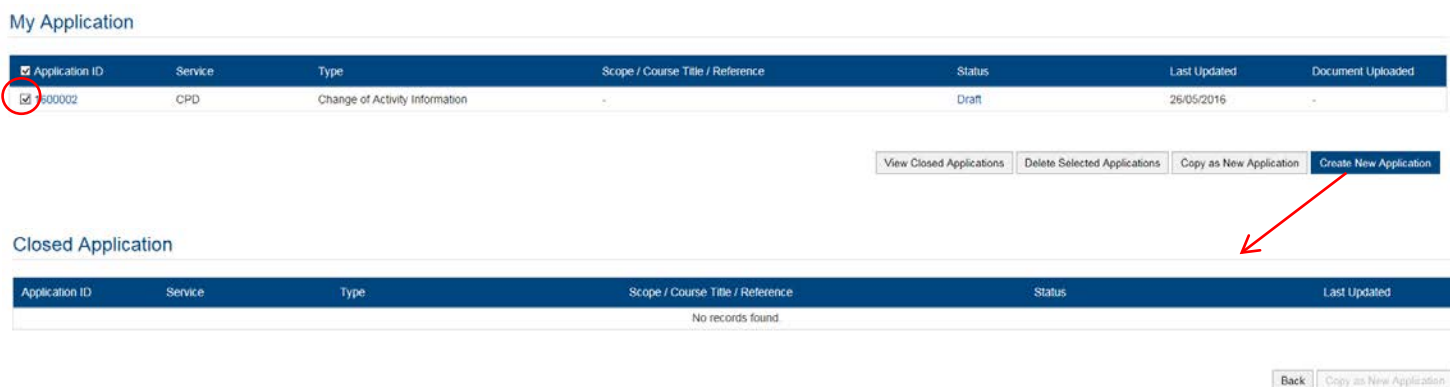
7. Special Function

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



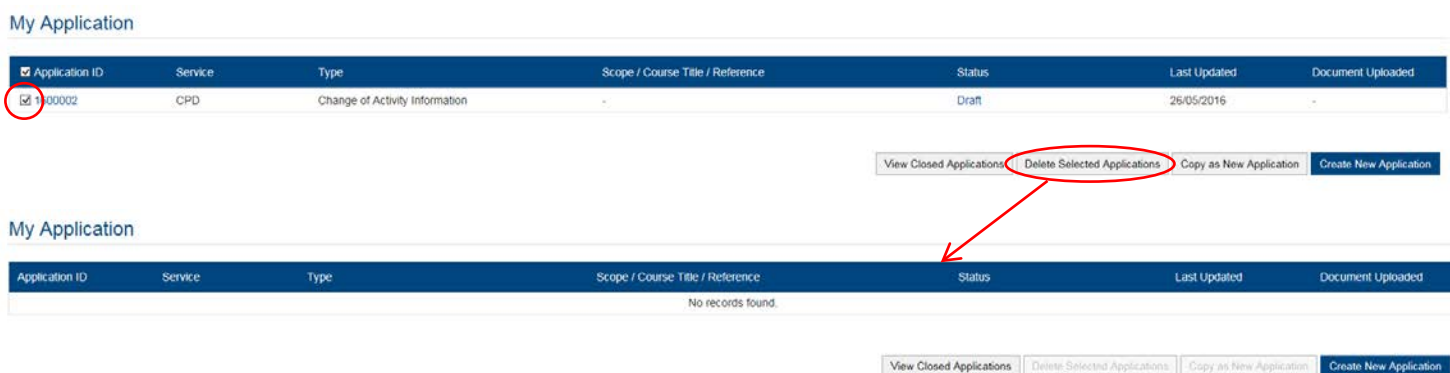
7.1 View Closed Applications

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



7.2 Delete Selected Applications

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



7.3 Copy as New Application

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

My Application

| 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 |
|----------------------------------|---------|--------------------------------|----------------------------------|-----------------------|--------------|-------------------|
| <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

| Application ID | Service | Type | Scope / Course Title / Reference | Status | Last Updated | Document Uploaded |
|---|---------|--------------------------------|----------------------------------|-----------------------|--------------|-------------------|
| <input checked="" 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 organizers

Type of Application: Change of CPD Activity

Status: Draft

Application ID: 1600003

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

CPD Ref. No.: 8042/02

Title of Activity: English

Created: 26/05/2016 14:44:45

Last Updated: 26/05/2016 14:44:45

Submitted: -

Details of Proposed Changes

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

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

Responsible Persons

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

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

Supporting Document(s)

Please upload supporting documents according to the checklist:

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

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

Declaration

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

A person who, either orally or in writing, makes any statement or representation or furnishes any information to HKCAAVQ in connection with the performance of its functions under HKCAAVQ Ordinance (Chapter 115D) which the person knows or reasonably ought to know is misleading or false in a material respect commits an offence and is liable on conviction to a fine at level 5.

☐ I agree with the above declaration.

[Submit Application](#)

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

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

8. Points to Note

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

Ms Janice SO on 3658 0183 or email to cpd_ia@hkcaavq.edu.hk