

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

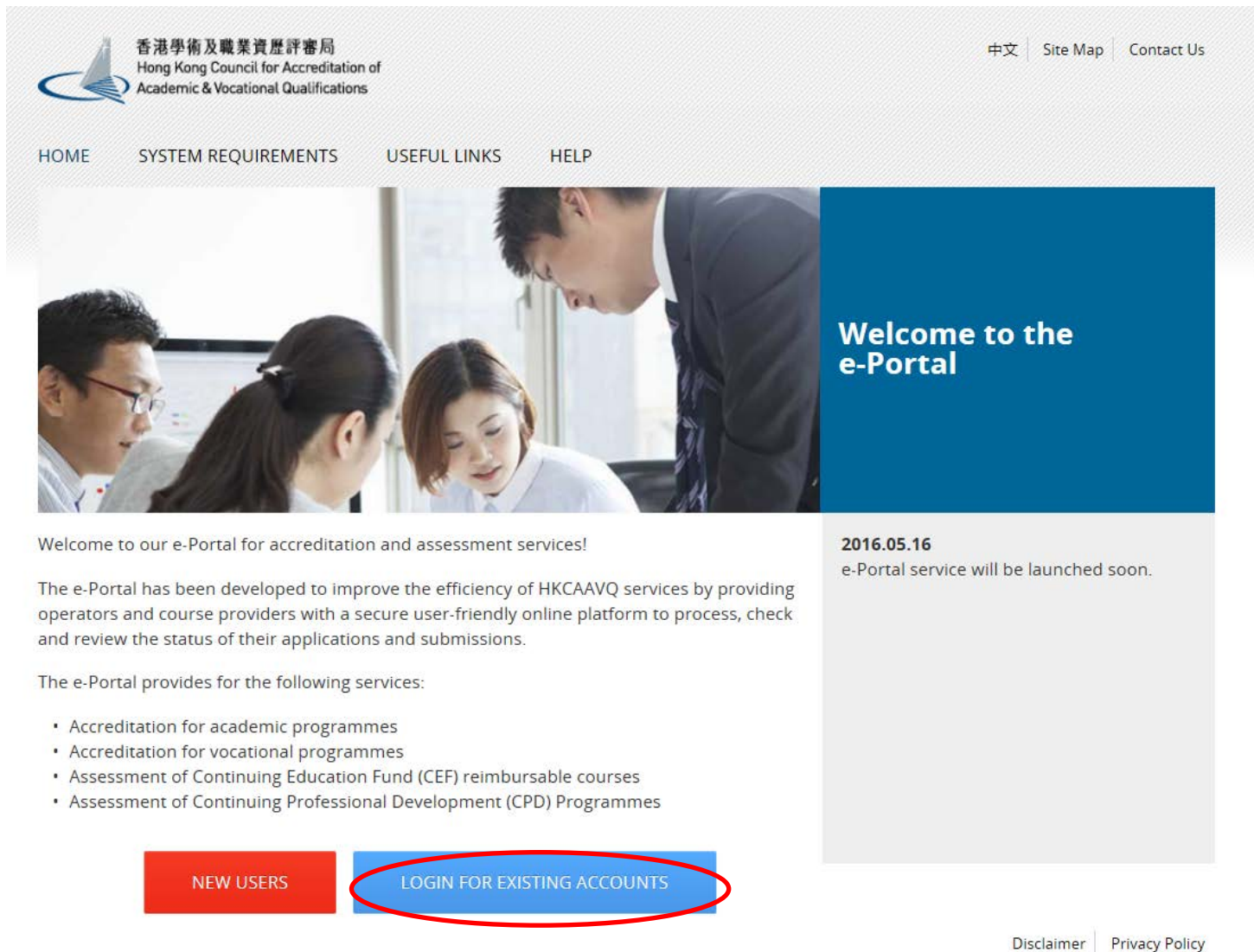
Table of Contents

1. Login to the e-Portal account	3
2. Create New Application	5
3. Fill in the CPD Re-assessment Online Application Form	6
4. Upload Supporting Document(s)	14
5. Payment	16
6. Submit Application	19
7. Special Function	21
7.1 View Closed Applications	21
7.2 Delete Selected Applications	21
7.3 Copy as New Application	22
8. Points to Note	23

1. Login to the e-Portal account

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

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



The screenshot shows the homepage of the Hong Kong Council for Accreditation of Academic & Vocational Qualifications (HKCAAVQ) e-Portal. The header includes the HKCAAVQ logo and name in Chinese and English, along with links for '中文', 'Site Map', and 'Contact Us'. A navigation bar contains links for 'HOME', 'SYSTEM REQUIREMENTS', 'USEFUL LINKS', and 'HELP'. Below the navigation bar is a large image of three people (two men and one woman) looking at a computer screen. To the right of the image is a blue box with the text 'Welcome to the e-Portal'. Below the image, there is a welcome message: 'Welcome to our e-Portal for accreditation and assessment services!'. This is followed by a paragraph explaining the purpose of the e-Portal: '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.' Below this, it states 'The e-Portal provides for the following services:' and lists four services: 'Accreditation for academic programmes', 'Accreditation for vocational programmes', 'Assessment of Continuing Education Fund (CEF) reimbursable courses', and 'Assessment of Continuing Professional Development (CPD) Programmes'. At the bottom, there are two buttons: 'NEW USERS' (red) and 'LOGIN FOR EXISTING ACCOUNTS' (blue). The 'LOGIN FOR EXISTING ACCOUNTS' button is circled in red. To the right of the buttons, there is a grey box with the date '2016.05.16' and the text 'e-Portal service will be launched soon.' At the bottom right, there are links for 'Disclaimer' and 'Privacy Policy'.

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 2: 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.

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


I Agree

Step 3: Enter the Username and Password, click

Login

中文

H K e-Portal 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

The screenshot shows the HKCAAVQ user interface. At the top, there is a header with the HKCAAVQ logo and navigation links. Below the header, the 'My Application' section displays a table of applications. The table has columns for Application ID, Service, Type, Scope / Course Title / Reference, Status, Last Update On, and Document Uploaded. The 'Create New Application' button is highlighted with a red circle.

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	-

Buttons: View Closed Applications, Delete Selected Applications, Copy an Existing Application, **Create New Application**

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

The screenshot shows the 'Please Select Service and Type of Application' form. The 'Service' dropdown is set to 'The Continuing Professional Development Programme for Insurance Intermediaries (CPD)'. The 'Type of Application' dropdown is open, showing options: 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, and Renewal of QF Accredited Learning Programme as CPD activity. The 'Re-assessment of CPD Activity' option is selected. The 'Next' button is highlighted with a red circle.

Step 3: After reading the guidelines, please click Next

Guidelines for The Continuing Professional Development Programme for Insurance Intermediaries (for assessment, re-assessment and change application)

1. This online application is applicable for CPD Activity Provider who wishes to offer both Structured Type 1 Qualified CPD Activities and Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries.
2. For Structured Type 1 Qualified CPD Activities, please read the Guidance Notes on Assessment of Structured Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries available at www.hkcaavq.edu.hk before you fill in the online application form.
3. For Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries, please read the Guidance Notes on Assessment of Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries available at www.hkcaavq.edu.hk before you fill in the online application form.
4. Please fill in the required information and upload the supporting documents with completed document checklist when submitting the online application for CPD Services. The checklist of required documents can be found in the online application form.
5. Please settle the assessment fee in accordance with the Fee Schedule. Payment methods are as follows:-
 - a. Bank deposit: please direct deposit the required assessment fee to Industrial and Commercial Bank of China (Asia) Limited a/c No. 072-861-502020073 (Hong Kong Council for Accreditation of Academic and Vocational Qualifications). Please upload the proof of payment with the online application form.
 - b. By cheque: please send the cheque with the printout (after submitting the form) from the online application and made payable to "Hong Kong Council for Accreditation of Academic and Vocational Qualifications" by post.
6. A receipt will be issued to you once HKCAAVQ confirms receipt of the fee payment.
7. Please note that **an application will not be processed if no payment and/or insufficient documents are received by HKCAAVQ.**
8. You may edit the online application form in "My Application" of this e-portal if you wish. Once you press "submit", you cannot edit the information and the status of this application will show as "Review by HKCAAVQ" in "My Application".
9. Upon receiving the required supporting documents and application fee, HKCAAVQ will send you an acknowledgement email and start processing your application.
10. The status of your application could be checked in "My Application" of this e-portal.
11. For enquiries, please contact HKCAAVQ Secretariat at:
10 Siu Sai Wan Road
Chai Wan, Hong Kong
Tel: 3658 0176
Email: cpd_fa@hkcaavq.edu.hk

By clicking Next, you agree to the above guideline.

Next

3. Fill in the CPD Re-assessment Online Application Form

Tips:

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

Step 1: Fill in the information

CPD Re-assessment Online Application Form

[Click here to view the notes to activity organisers.](#)

Type of Application: Re-assessment of CPD Activity Created: 24/05/2016 16:32:18

Status: Draft Last Updated: 24/05/2016 16:32:18

Application ID: 1600101 Submitted: -

Name of Activity Organisation:

CPD Ref. No.:

Title of Activity:

English: Chinese:

Existing Approval Period: From: To:

Approval Period Applied for: From: To:

Number of CPD Hours Approved in the Existing Approval Period: Assessment Fee:

Target Participants:

☐ In-house (employees of CPD Provider) ☐ General Public ☐ Employees of Commissioning Body

☐ Others (Please specify):

Step 2: Click **Add** to add Responsible Persons, and then the box of “Select Contact Person” will be shown.

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

Responsible Persons

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

[Delete](#) [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	-	uae_cp02@hkcaa.org.hk	Room 2000, Tai Koo Building, 296 Prince Edward Road, Hong Kong, Kowloon
<input type="checkbox"/>	Mr.	Wong	Ka Lee	Vice President	24567896	-	uae_cp02@hkcaa.org.hk	-
<input type="checkbox"/>	Mr.	Yip	Man Chuen	Manager	23456789	-	uae_cp02@hkcaa.org.hk	Room 2000, Tai Koo Building, 296 Prince Edward Road, Hong Kong, 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"/> Mr	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 4: Fill in the necessary information

Activity Statistics

During the approval period,

1. Number of times the CPD activity has been held:
2. Total Number of Attendees:
3. Total number of participants who have successfully completed the activity:

- The total number of attendees refers to the number of participants who have signed in to the CPD activity.
- If the CPD activity adopts a modular design, please provide an attachment of the breakdown of the above figures for each of the modules.

Step 5: Fill in the information if there is/are any change(s) since Last Approval . If yes, please go to step 5a-5c. Otherwise, please go to step 6 to continue.

- ❖ If there are more the one changes since Last approval, please repeat the steps 5a to 5c.

Step 5a: Click **Add**

Changes since Last Approval

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

Add Change

Category: *

Please specify below for other category

Change from: *

Change to: *


Reason(s): *

Step 5b: Click the pull down button and select the category

Category: *

Please specify below for other 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.
2. No additional fee will be charged for “Changes to be approved in the Next Approval Period” except for change in CPD hours and activity contents for more than 20% in a re-assessment application.
3. For changes less than or equal to 20% in activity contents within the same module (if applicable) or the whole CPD activity (for non-modular design activities) without changing the total CPD hours, please select “**Others**” under the “Category” for reporting the change(s), and state that the change of course content is less than or equal to 20% with details of change.
4. For Changes of categories other than the above, please select “Others” and specify the details.
5. For applying for Virtual Classroom, please select “Course Contents/Adoption of Virtual Classroom” and state “Adoption of Virtual Classroom”.

Step 5c: Fill in the necessary information

- ❖ If you would like to report the change since last approval, for example, the number of instructors from 10 to 11, you may fill-in 10 instructors in “Change from” and 11 instructors in “Change to” as below, and provide the Reason(s). Then Click **Save**

Add Change

Category: * Instructor

Please specify below for other category:

Change from: * 10 instructors

Change to: * 11 instructors

Reason(s): *

Cancel Save

Step 6: Fill in the information if there is/are any change(s) or changes to be approved in the next approval period . If yes, please go to step 6a-5c. Otherwise, please go to step 7 to continue.

Changes to be approved in the Next Approval Period

Category	Change from	Change to	Reason(s)	Fee
No records found.				
				Delete Add

1. If there are changes involving both in activity contents and CPD hours in one single application, only the highest amount will be charged.

2. No additional fee will be charged for "Changes to be approved in the Next Approval Period" except for change in CPD hours and activity contents for more than 20% in a re-assessment application.

3. For changes less than or equal to 20% in activity contents within the same module (if applicable) or the whole CPD activity (for non-modular design activities) without changing the total CPD hours, please select **"Others"** under the "Category" for reporting the change(s), and state that the change of course content is less than or equal to 20% with details of change.

Step 6a: Click **Add**

Changes to be approved in the Next Approval Period

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

1. If there are changes involving both in activity contents and CPD hours in one single application, only the highest amount will be charged.

2. No additional fee will be charged for "Changes to be approved in the Next Approval Period" except for change in CPD hours and activity contents for more than 20% in a re-assessment application.

3. For changes less than or equal to 20% in activity contents within the same module (if applicable) or the whole CPD activity (for non-modular design activities) without changing the total CPD hours, please select "Others" under the "Category" for reporting the change(s), and state that the change of course content is less than or equal to 20% with details of change.

Add

Add Change

Category: *

Please specify below for other category:

Change from: *

Change to: *

Reason(s): *

Cancel Save

Step 6b: Click the pull down button and select the category

Add Change

Category: *

Please specify below for other category:

Change from: *

Change to: *

Reason(s): *

Cancel Save

Activity Title

Appointment Criteria

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


Step 6c: Fill in the necessary information


- ❖ *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)” and Adoption of Virtual Classroom in “Change to” as below, and 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 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

Reason(s): * N/A

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

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): *

- ❖ *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" as below, and provide the Reason(s). Then Click*
- ❖ *You may also need to upload the relevant documents in support of your application.*

Add Change

Category: *

Please specify below for other category:

Change from: *

Change to: *

Reason(s): *

Step 7: Fill in the information in relation to Quality Assurance.

- ❖ *For Structured Activity, please provide the Report of quality assurance activities conducted during the reporting period such as date(s) of course evaluation meeting(s), class observation(s), and follow-up action(s) on identified issue(s) from the participant evaluation.*
- ❖ *For Structured Activity adopting virtual classroom, please also provide the report of quality assurance of virtual classroom, e.g. specific attendance monitoring system, policies / guideline / methods for maintaining integrity and security of participants' data*
- ❖ *For applying for the virtual classroom during the re-assessment, please provide the detailed arrangements of virtual classroom as a delivery mode, e.g. specific attendance monitoring system, policies / guideline / methods for maintaining integrity and security of participants' data.*
- ❖ *For E-learning Activity, please provide the report of Quality Assurance Mechanisms such as the procedures for the development, approval and review of E-learning Activities, measures to review activity content and monitor e-learning administrators/instructors' performance and review meeting(s) on monitoring the CPD activity and follow up users' feedback.*
- ❖ *If the content exceeds the word limit, you may provide this information as attachment.*

Quality Assurance

Brief account of Quality Assurance activities conducted / follow-up action taken in the last approval period (e.g. participant evaluation results, review meeting, class observation and follow-up actions taken arising from participant's feedback).

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 (as Attachment 12) 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> <input type="button" value="Delete"/> <input type="button" value="Upload Documents"/> </div>		

Application for Re-assessment of Structured Type 1 Qualified CPD Activity for Licensed Insurance Intermediaries

Supporting Document Checklist

Please prepare and upload the following documents to support your application. Failure to provide the following documents may delay the assessment process and affect the assessment outcome.

Please indicate the availability of the documents. The duly completed checklist should be uploaded (as Attachment 12) together with the documents.

Attachment No.	Documents Concerned	Availability
1.	Background information about the CPD activity organiser with organisational chart. (*If there are any updates)	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
2.	Information of similar activities offered in the past For application involving virtual classroom, please also provide track records showing at least one qualified CPD activity had completed HKCAAVQ's Reassessment. (*If there are any updates / applicable to first time application of virtual classroom)	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
3.	Copy of Business Registration (BR) / Certificate of Incorporation (CI) (*If there are any updates including the expiry date showed in the BR or CI)	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
4.	Updated lesson Plan with Hourly Breakdown, For CPD activity adopting modular design, an outline of all modules including module title, CPD hours, contents and number of modules should be clearly specified.	<input type="checkbox"/> yes
5.	If there are any changes in the course contents, a full set of updated course materials, seminar handouts, and/or seminar papers is required. A comparison table should be submitted to report the change(s). CPD provider should also provide the rationale for the amendment(s).	<input type="checkbox"/> yes <input type="checkbox"/> not applicable

1

6.	List of approved activity venue(s) for the next approval period with full address(es) and capacity(ies). For Structured Activity adopting virtual classroom only and without a designated teaching venue, please mark "virtual classroom" and maximum number of participants per activity in the list.	<input type="checkbox"/> yes
7.	For new venue(s) not previously approved, please upload floor plan(s) with capacity(ies), rental agreement(s) and insurance coverage for third party liability.	<input type="checkbox"/> yes <input type="checkbox"/> not applicable
8.	Profiles of all instructors or presenters including their academic and professional qualifications, and training/industry experience.	<input type="checkbox"/> yes
9.	Summary of course evaluation results for the reporting period.	<input type="checkbox"/> yes
10.	Report of quality assurance activities conducted during the reporting period such as date(s) of course evaluation meeting(s), class observation(s), and follow-up action(s) on identified issue(s) from the participant evaluation. For Structured Activity adopting virtual classroom, please also provide the report of quality assurance of virtual classroom, e.g. specific attendance monitoring system, policies / guideline / methods for maintaining integrity and security of participants' data For applying for the virtual classroom during the re-assessment, please provide the detailed arrangements of virtual classroom as a delivery mode, e.g. specific attendance monitoring system, policies / guideline / methods for maintaining integrity and security of participants' data.	<input type="checkbox"/> yes <input type="checkbox"/> already stated in the Online Application Form
11.	Sample attendance certificate issued to the CPD participants	<input type="checkbox"/> yes
12.	Passing rate(s) of examination and/or continuous assessment (*Where applicable)	<input type="checkbox"/> yes <input type="checkbox"/> not applicable

-- END --

2

- ❖ 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 (as Attachment 16) together with the documents.

**Application for
Re-assessment 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 (as Attachment 16) together with the supporting documents.

No.	Documents to be uploaded	Availability
1.	Background information about the E-learning Activity Provider with <u>organisational</u> chart. <i>(*If there are any updates)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
2.	Information of organising E-learning programmes / CPD activities. <i>(*If there are any updates)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
3.	Copy of Business Registration (BR) / Certificate of Incorporation (CI) <i>(*If there are any updates including the expiry date showed in the BR or CI)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
4.	Activity Plan with detailed breakdown. For E-Learning activity adopting modular design, an outline of all modules including module titles, CPD hours, contents and number of modules should be clearly specified.	<input type="checkbox"/> yes
5.	If there are any changes in instructional materials, e.g. lecture notes, PowerPoint slides and digital media, a full set of updated materials is required. A comparison table should be submitted to report the change(s). CPD provider should also provide the rationale for the amendment(s).	<input type="checkbox"/> yes <input type="checkbox"/> not applicable

6.	List of approved activity venue(s) for the next approval period with full address(es) and capacity(ies). <i>(*applicable to E-learning Activities with a designated assessment venue)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
7.	Floor plan, rental agreement, insurance coverage for third party liability and/or other possible evidence of activity venue. <i>(*applicable to add a designated assessment venue to E-learning Activities)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
8.	Description of secured login and identity authentication system adopted	<input type="checkbox"/> yes
9.	Profiles of all E-learning administrators / instructors including their academic and professional qualifications, and training/industry experience.	<input type="checkbox"/> yes
10.	Sample End-of-Activity Participant Evaluation Form <i>(*If there are any updates)</i>	<input type="checkbox"/> yes* <input type="checkbox"/> not applicable
11.	Summary of End-of-Activity participants' evaluation results for the last approval period	<input type="checkbox"/> yes
12.	Description of Technical Support Services including roles and responsibilities of respective technical personnel and a range of services provided by different technical personnel and the selection criteria for external service providers	<input type="checkbox"/> yes
13.	Sample attendance certificate issued to the CPD participants	<input type="checkbox"/> yes
14.	Report of Quality Assurance Mechanisms such as the procedures for the development, approval and review of E-learning Activities, measures to review activity content and monitor e-learning administrators/instructors' performance and	<input type="checkbox"/> yes <input type="checkbox"/> already stated in the Online Application Form

	review meeting(s) on monitoring the CPD activity and follow up users' feedback.	
15.	Question bank of EoA/EoM assessment(s) with assessment criteria / model answers	<input type="checkbox"/> yes
16.	Completed Document Checklist with the Availability indicated	<input type="checkbox"/> yes

- END -

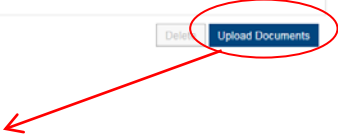
Step 2: Click **Upload Documents** , then click **Select Files**

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

Delete **Upload Documents**



Upload Documents ✕

Document Type: *

Supporting Document ▼

File Name: *

Select Files

Cancel **Upload**

Step 3: When the file(s) has been selected 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 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

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: -

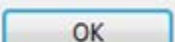
Choose File to Upload: Select File Upload Proof of Payment

Payment

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

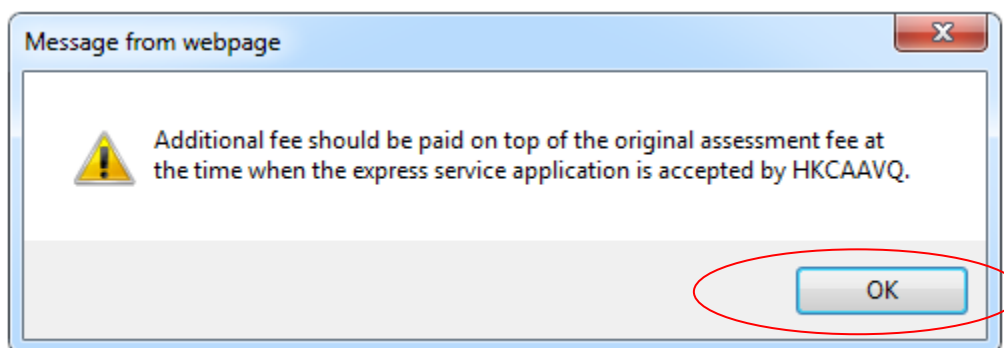
☒ Apply for an Express Service

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



Step 1: Click [Download Application Form](#) , select your preferred Language [Download](#) [Link](#) .
The form will be shown for your own record.

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.

[Submit Application](#)[Download Application Form](#)

Back Save as Draft

✶

Please select your preferred Language: * ☐ Chinese ☒ English

☐ Chinese ☒ English

Cancel Download

19

Step 2: After reading the declaration, check the box next to “I agree with the above declaration”, and press **Submit Application**

Declaration

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

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☒ I agree with the above declaration

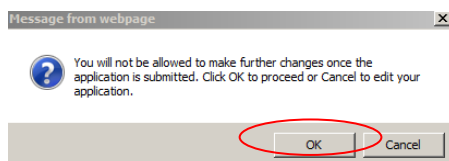
Submit Application

Download Application Form

Back Save as Draft

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

OK



Step 4: The application has been submitted successfully. If you wish to pay by cheque, please print this page together with the cheque send to HKCAAVQ. Otherwise, Click **Back**

Submit Application

The online application was submitted successfully.

Application ID:

1600100

Submitted:

24/05/2016 16:25:24

Back Print

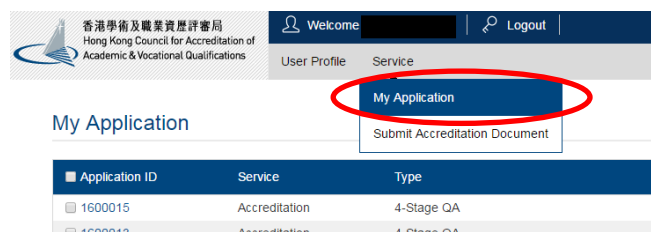
Step 5: The application you submitted to HKCAAVQ will be shown under “My Application”. The status of the application will be changed to “For Review by HKCAAVQ”.

My Application

Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Update On	Document Uploaded
<input type="checkbox"/> 1600100	CPD	Assessment	aaa	For Review by HKCAAVQ	24/05/2016	

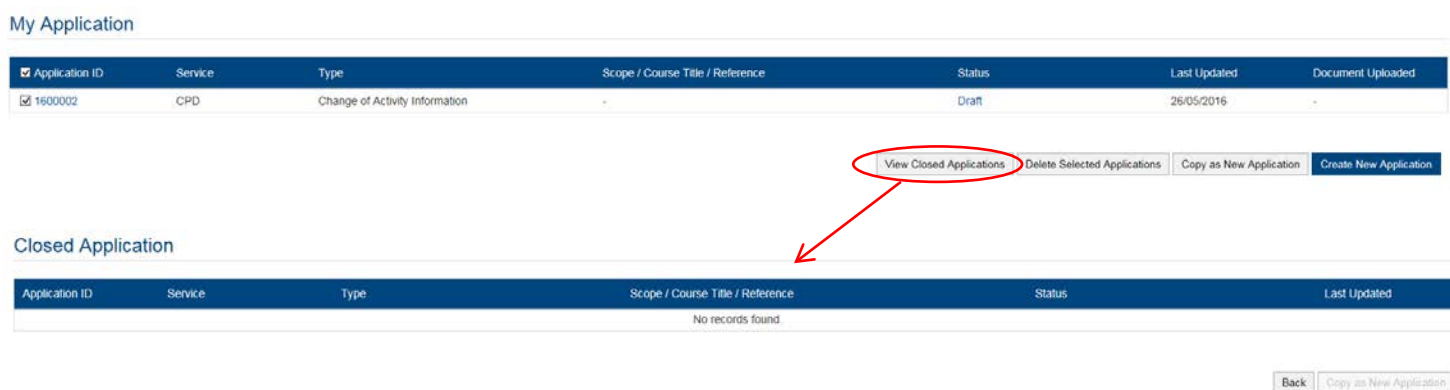
7. Special Function

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



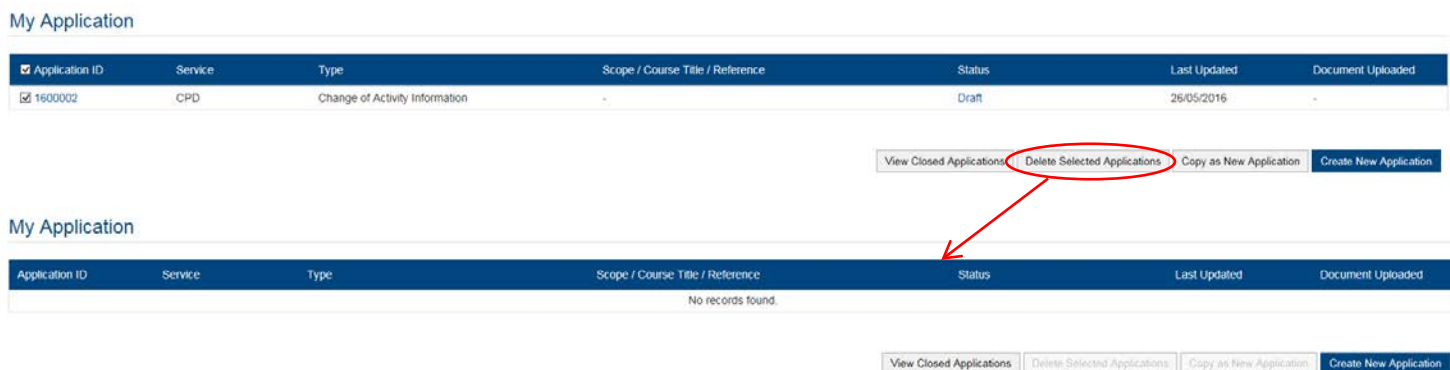
7.1 View Closed Applications

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



7.2 Delete Selected Applications

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



7.3 Copy as New Application

Step 1: Check the box next to the application ID, click **Copy as New Application, and the information of the selected application 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
 Status: Draft
 Application ID: 1600003
 Name of Activity Organisation: Institute of Financial Planners of Hong Kong
 CPD Ref. No.: 8242/02
 Title of Activity: English

Details of Proposed Changes

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

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

Responsible Persons

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

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

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

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

Declaration

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

A person who, either orally or in writing, makes any statement or representation or furnishes any information to HKCAAVQ in connection with the performance of its functions under HKCAAVQ Ordinance (Chapter 1155) 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