

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

Table of Contents

1. Login to the e-Portal account	3
1.1 Update “User Profile”	5
2. Create New Application	6
3. Fill in the CPD Assessment Online Change Application Form	7
3.1 Structured Activity	9
3.2 E-learning Activity	15
4. Payment	20
5. Submit Application	22
6. Special Function	24
6.1 View Closed Applications	24
6.2 Delete Selected Applications	24
6.3 Copy as New Application	25
7. Points to Note	26

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

2016.05.16
e-Portal service will be launched soon.

Welcome to our e-Portal for accreditation and assessment services!

The e-Portal has been developed to improve the efficiency of HKCAAVQ services by providing operators and course providers with a secure user-friendly online platform to process, check and review the status of their applications and submissions.

The e-Portal provides for the following services:

- Accreditation for academic programmes
- Accreditation for vocational programmes
- Assessment of Continuing Education Fund (CEF) reimbursable courses
- Assessment of Continuing Professional Development (CPD) Programmes

NEW USERS **LOGIN FOR EXISTING ACCOUNTS**

Disclaimer | Privacy Policy

Step 3: After reading the Disclaimer, click

Disclaimer

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.

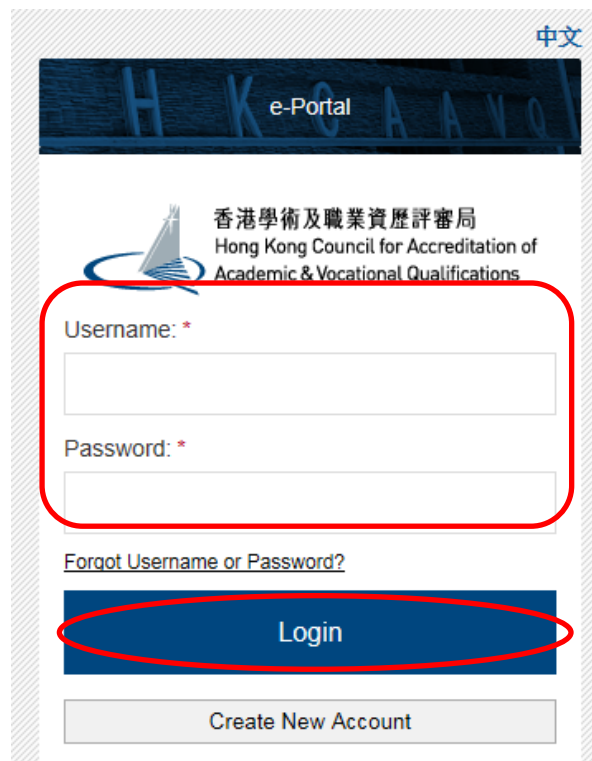
This website is linked to websites set up by other organisations / bodies / companies. HKCAAVQ expressly states that it has not approved or endorsed the information provided by any other websites linked to this website and HKCAAVQ accepts no responsibility or liability (howsoever caused) for such information.

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.

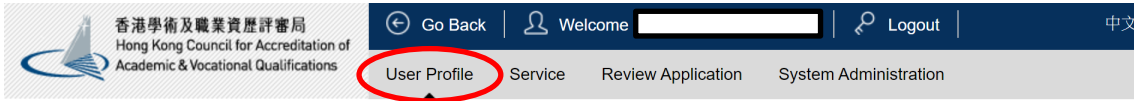


Step 4: Enter the Username and Password, click



1.1 Update “User Profile”

Step 1: Click User Profile



User Profile

Username: Change Password

Name: *

Title Surname First Name

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

List of Addresses

The list should include:
1. Operator administrative address
2. Teaching venue
Please update the address list before submitting application.

Address	Capacity (For CPD only)
<input type="checkbox"/> abc	100

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

Delete Add

2. Create New Application

Step 1: Click **Create New Application**

The screenshot shows the top navigation bar with the HKCAAVQ logo and user information. Below it, the 'My Application' section contains a table with columns: Application ID, Service, Type, Scope / Course Title / Reference, Status, Last Update On, and Document Uploaded. The table lists several applications, all with a status of 'Draft'. At the bottom right of the table, there are four buttons: 'View Closed Applications', 'Delete Selected Applications', 'Copy as New Application', and 'Create New Application'. The 'Create New Application' button is circled in red.

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

The screenshot shows a form titled 'Please Select Service and Type of Application'. 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 'Change of CPD Activity' option is selected and circled in red. A red arrow points from this selection to the 'Next' button, which is also circled in red.

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 organiser who wishes to offer CPD activities under the Insurance Intermediaries Quality Assurance Scheme (IIQAS).
2. Please read the Assessment Criteria for the CPD Programme with Fee Schedule available at www.hkcaavq.edu.hk before you fill-in the online application form.
3. Please fill-in the required information and upload the supporting documents when submitting the online application for IIQAS CPD services. The checklist of required documents can be found in the online application form.
4. 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.
5. A receipt will be issued to you once the HKCAAVQ confirms the payment.
6. Please note that **an application will not be processed if no payment and/or insufficient documents are received by the HKCAAVQ.**
7. You may edit the online application form in "My Application" of this e-portal if you wish. Once you press "submit", you cannot edit the information and the status of this application will show "Review by HKCAAVQ" in "My Application".
8. Upon receiving the required supporting documents and application fee, the HKCAAVQ will send you an acknowledgement email and start processing your application.
9. The status of your application could be checked in "My Application" of this e-portal.
10. For enquiries, please contact the HKCAAVQ Secretariat at:
10 Siu Sai Wan Road
Chai Wan, Hong Kong
Tel: 3659 0000
Email: info@hkcaavq.edu.hk

By clicking Next, you agree to the above guideline.

Next

3. Fill in the CPD Assessment Online Change Application Form

Tips:

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

Step 1: Fill in the necessary information

CPD Assessment Online Change Application Form

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

Type of Application:	Change of CPD Activity	Created:	24/05/2016 17:22:24
Status:	Draft	Last Updated:	24/05/2016 17:22:24
Application ID:	1600102	Submitted:	-

Name of Activity Organiser:	<input type="text"/>	<input type="checkbox"/>
CPD Ref. No.:	<input type="text"/>	
Title of Activity:	<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.				

Del **Add**

Add Proposed Change

Category: *	<input type="text"/>
Please specify below for other category:	
Change from: *	<input type="text"/>
Change to: *	<input type="text"/>
Effective Date: *	<input type="text"/>
Reason(s): *	<input type="text"/>
	<input type="button" value="Cancel"/> <input type="button" value="Save"/>

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

Add Proposed Change ✕

Category: * ▼

Change from: *

Change to: *

Fee for Change:

Effective Date: *

Reason(s): *

Activity Title

Adoption of Virtual Classroom

Appointment Criteria

Change on Virtual Classroom Delivery Arrangement (after approval of adoption of virtual classroom)

Course Contents

CPD Hours

Head of organization / department

Instructor

Medium of Instruction

Modular design

Name of Activity organizer

No. of maximum / minimum participants

Person-in-Charge/ Instructor

Quality Assurance

Target Participants

Training Venue

Others

Remarks:

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

3.1 Structured Activity


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

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

Add Proposed Change ✕

Category: * ▼

Please specify below for other category:

 notes and guideline

Change from: *

Change to: *

Maximum number of participants: *


Has the application of virtual classroom been approved in other activity(ies)? * Yes, please provide the CPD Reference No. of the latest approved activity: No

Ratio of administrators to participants: *

Virtual Classroom delivery arrangement is not applicable to the module(s):

Current CPD Hours: -


Fee for Adoption of Virtual Classroom: -

Effective Date: * 

Reason(s): *

- ❖ **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: * 

Please specify below for other category:

Change from: *



Change to: *
Addition of Hour(s)
Deletion of Hour(s)

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

Effective Date: * 

Reason(s): *

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



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

Step 2: Fill in the information of Responsible Persons

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

Responsible Persons

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

Delete **Add**

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.

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

Type: * Authorized Contact Person
Head of Organisation / Department
Person-in-charge

Upload Supporting Document(s)

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

- ❖ *For Structured Activity, please refer to the Supporting Document Checklist of Application for Change of of Structured Type 1 Qualified CPD Activity for Licensed Insurance Intermediaries for preparing the documents.*
- ❖ *The duly completed checklist should be uploaded together with the documents.*

Supporting Document(s)

Please upload supporting documents according to [the checklist](#). The template of instructor list is available [here](#).

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

[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
<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	
<input type="checkbox"/> Medium of Instruction For adoption of virtual classroom, please select this category	Relevant internal documents
<input type="checkbox"/> Target Participants	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"/> Head of organization / department	Relevant internal documents
<input type="checkbox"/> Person-in-Charge/ Instructor	Updated profile
<input type="checkbox"/> Appointment Criteria	Relevant internal documents
<input type="checkbox"/> Training Venue	Floor plan, rental agreement, insurance coverage for third party liability and/or other possible evidence
<input type="checkbox"/> No. of maximum / minimum participants	Capacity of activity venue
<input type="checkbox"/> Quality Assurance	Quality assurance manual
<input type="checkbox"/> Others:	Relevant supporting documents in relation to the change

-- END --

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

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

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

Del **Upload Documents**

Upload Documents ✕

Document Type: * Supporting Document

File Name: * **Select Files**

Cancel Upload

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

Upload Documents ✕

Document Type: * Supporting Document

File Name: * **Select Files**

Lesson Plan.pdf (79KB)

Cancel **Upload**

3.2 E-learning Activity

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

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

Edit Proposed Change

Category: * CPD Hours

Please specify below for other category:

Change from: * 13.0 Hour(s)

Change to: * Addition of 2.0 Hour(s)
Deletion of Hour(s)

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

Effective Date: * 16/08/2018

Reason(s): * As there is over 50% change in Module X, it will be replaced by this new module of 2 hours.

Cancel Save

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

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

Step 2: Fill in the information of Responsible Persons

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

Responsible Persons

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

Delete **Add**

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

Select Contact Person *

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

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

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

Type: *

Authorised Contact Person
Head of Organisation / Department
Person-in-charge

Upload Supporting Document(s)

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

- ❖ *For E-learning Activity, please refer to the Supporting Document Checklist of Application for Change of Type 1 Qualified E-learning Activity for Licensed Insurance Intermediaries for preparing the documents.*
- ❖ *The duly completed checklist should be uploaded together with the documents.*

Application for
Change of Type 1 Qualified E-learning Activity
for Licensed Insurance Intermediaries

Supporting Document Checklist

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

Please indicate the availability of the documents. The duly completed checklist should be uploaded together with the documents.

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

-- END --

Step 2: Click [Upload Documents](#) , then click [Select Files](#)

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

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

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

Upload Documents

Document Type: *

File Name: * [Select Files](#)

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

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

Upload Documents ✕

Document Type: *

File Name: * **Select Files**

Lesson Plan.pdf (79KB)

4. Payment

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

Payment

Assessment Fee: \$8,000.00 Payment Method: Bank-Deposit
Cheque
Tele-Transfer ▼

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: -

Choose File to Upload: Select File

Proof of payment.docx (12KB)

Upload Proof of Payment

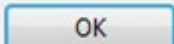
Payment

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 📎

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

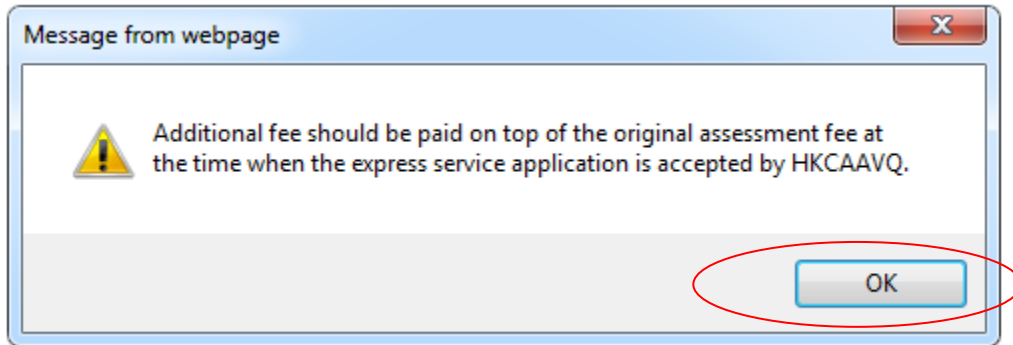
Assessment Fee: \$8,000.00 Payment Method:

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:



5. Submit Application

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

Declaration

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

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

I agree with the above declaration

[Submit Application](#)

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

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

Select Language

Please select your preferred Language: * Chinese English

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

<p style="text-align: center;">Change Application Form Type 1 Qualified Continuing Professional Development Activity for Licensed Insurance Intermediaries <small>(Version: April 2022)</small></p> <p>This generated application form for Change of a structured CPD activity or E-learning activity serves for record purpose only. Please submit the online application form via e-Portal directly.</p> <p>Please refer to Chapter 5 of the "Guidance Notes on Assessment of Structured Type 1 Qualified CPD Activities for Licensed Insurance Intermediaries" and the "Guidance Notes on Assessment of Type 1 Qualified E-learning Activities for Licensed Insurance Intermediaries" for a document checklist and prepare the necessary supplementary documents for the application.</p> <p>Title of activity: _____</p> <p>CPD Ref. No.: _____</p> <p>Name of activity organizer: _____</p>	<p>SECTION A Details of Proposed Changes</p> <p>Please specify the proposed change(s) in the following table and provide the relevant supporting documents and required fee (if any). Separate sheet(s) may be added if necessary.</p> <p>Please refer to the supporting documents checklist for Change Application for more information.</p>	<p>SECTION B Responsible Persons</p> <table border="1"> <thead> <tr> <th></th> <th>Head of organization/ department</th> <th>Person-in-Charge</th> <th>Authorized contact person*</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Position</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Organisation</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Address</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Phone</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fax</td> <td></td> <td></td> <td></td> </tr> <tr> <td>E-mail address</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p><small>* The HKCAAVQ will direct inquiries about the application to the authorized contact person, whose name and phone number will be put on the HKCAAVQ Website for approved CPD activities open to the public. Please inform the HKCAAVQ when there are changes in the above information.</small></p> <p>SECTION C Declaration by the Authorised Person-in-charge</p> <p><input type="checkbox"/> I declare that all the information provided in the Assessment Change Application Form is accurate to the best of my knowledge. I understand and accept that the HKCAAVQ may approach us directly for further information regarding the application. I also understand and accept that a non-refundable fee (if any) is charged for the change application irrespective of the outcome.</p> <p>A person who, either orally or in writing, makes any statement or representation or furnishes any information to the HKCAAVQ in connection with the performance of its functions under the HKCAAVQ Ordinance (Chapter 1150) which the person knows or reasonably ought to know is misleading or false in a material respect commits an offence and is liable on conviction to a fine at level 5.</p> <p>Name _____ Post _____ Date _____</p>		Head of organization/ department	Person-in-Charge	Authorized contact person*	Name				Position				Organisation				Address				Phone				Fax				E-mail address			
	Head of organization/ department	Person-in-Charge	Authorized contact person*																															
Name																																		
Position																																		
Organisation																																		
Address																																		
Phone																																		
Fax																																		
E-mail address																																		

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

Declaration

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

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

I agree with the above declaration

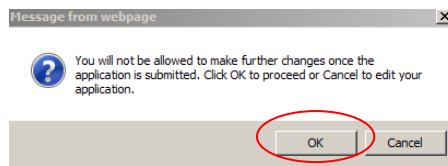
Submit Application

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



Step 4: The application has been submitted successfully. Click **Back**

Submit Application


The online application was submitted successfully.

Application ID: 1600100 Submitted: 24/05/2016 16:25:24

Back **Print**

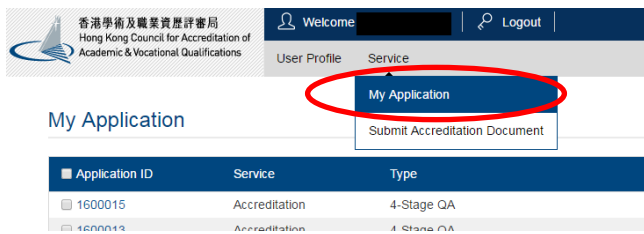
Step 5: The application you submitted to HKCAAVQ will be shown under “My Application”. The status of the application will be changed to “For Review by HKCAAVQ”

My Application

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

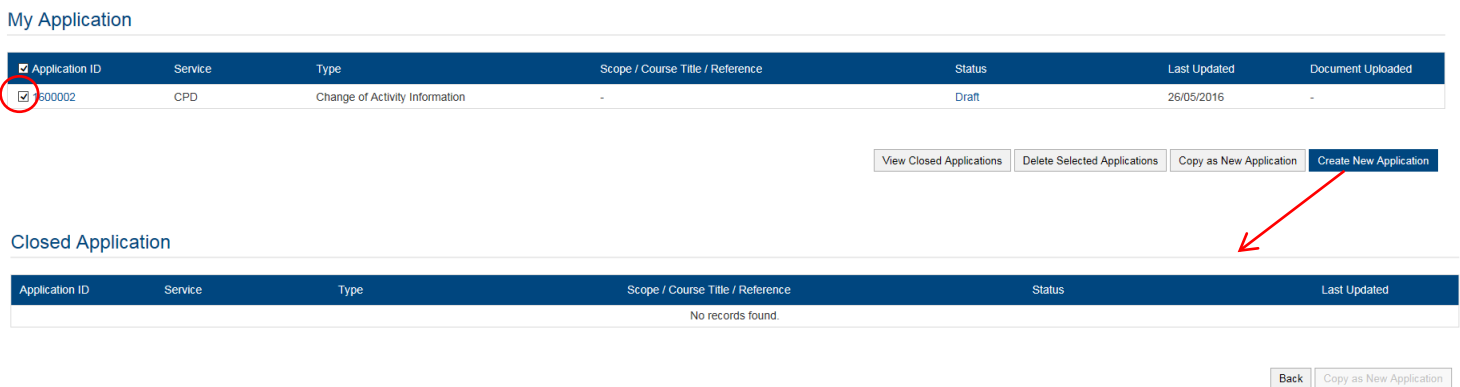
6. Special Function

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



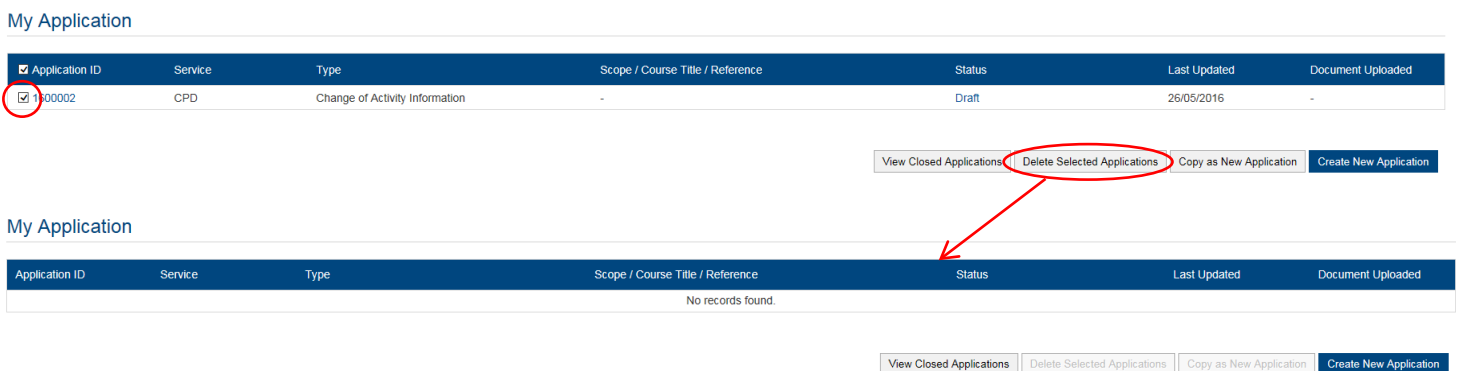
6.1 View Closed Applications

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



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



6.3 Copy as New Application

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

My Application

<input checked="" type="checkbox"/>	Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
<input checked="" type="checkbox"/>	1600002	CPD	Change of Activity Information	-	Draft	26/05/2016	-

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

My Application

<input type="checkbox"/>	Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
<input type="checkbox"/>	1600003	CPD	Change of Activity Information	a	Draft	26/05/2016	-
<input type="checkbox"/>	1600002	CPD	Change of Activity Information	a	For Review by HKCAAVQ	26/05/2016	-

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

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

My Application

<input type="checkbox"/>	Application ID	Service	Type	Scope / Course Title / Reference	Status	Last Updated	Document Uploaded
<input type="checkbox"/>	1600003	CPD	Change of Activity Information	a	Draft	26/05/2016	-
<input type="checkbox"/>	1600002	CPD	Change of Activity Information	a	For Review by HKCAAVQ	26/05/2016	-

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

CPD Assessment Online Change Application Form

Click here to view the notes to activity organisers.

Type of Application: Change of CPD Activity

Status: Draft

Application ID: 1600003

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

CPD Ref. No.: 8092/02

Title of Activity: a

English Chinese

Created: 20/05/2016 14:44:48

Last Updated: 26/05/2016 14:44:48

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

<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"/>	Ir	b	b	-	-	-	-	-	-	Person-in-charge
<input type="checkbox"/>	Ir	b	b	-	-	-	-	-	-	Authorised Contact Person

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

Supporting Document(s)

Please upload supporting documents according to the checklist.

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

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

Declaration

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

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](#)

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

Telephone: 3658 0234

Email: cpd_ia@hkcaavq.edu.hk