CPD Essentials

Frequently asked questions

FAQs

Here are the most frequently asked questions we've received on CPD Essentials. If you have a question that isn't answered below or in any of the supporting information, please call CII Customer Service on: +44 (0)20 8989 8464.

1. Where can I find out about CPD Essentials?

The best place to find out more is the CPD Essentials leaflet available at **cii.co.uk/cpdessentials** which outlines the service, who it is suitable for and how much it costs.

After reading this and the information below, should you have any questions which are not answered, please call Customer Service on: **+44 (0)20 8989 8464**.

2. CPD Essentials states it provides 35 hours of CPD content, but I completed it in less time. Can you explain the shortfall?

We've calculated the amount of CPD hours in CPD Essentials using an average online reading speed of 200 words per minute, and on the basis that all the content provided will be relevant to the user. This also assumes the user reads the 28 e-briefing programmes and the monthly news updates.

Clearly, the actual time it will take an individual to complete the learning provided will vary from person to person reflecting factors including individual CPD requirements and differing levels of existing knowledge and learning abilities. It is also the case that CPD requires the user to do more than simply read the content, ensuring it is understood. In many instances this will require more than a single reading of some of the content.

Should you find you have completed the learning provided within CPD Essentials in under 35 hours we would direct you to the Chartered Insurance Institute's CPD scheme for details of other recommended activities (see the guidance link on the bottom right hand side of the log-in screen at **cii.co.uk/cpd**). If you are a current Chartered Insurance Institute/Personal Finance Society member, you will have access to a range of CPD support, much of it free of charge. Please see the member sections of the Chartered Insurance Institute or Personal Finance Society websites.

3. I advise on areas that are not covered within CPD Essentials. Why doesn't it address these?

CPD Essentials focuses on the subjects that make up the level 4 appropriate examination standards for retail investment advisers, which are highlighted in the FCA Handbook as core areas where advisers need to maintain their knowledge. It is not practical to develop content covering every specialisation and, in practice, it would necessitate charging a fee for CPD Essentials that would put this beyond the reach of most advisers.

Where you specialise in particular areas of advice that are not catered for via CPD Essentials, you will need to undertake separate additional CPD to meet your needs. A range of CPD solutions are available in the market, including those from the Personal Finance Society, to help members address their CPD needs. If you are not a member we would encourage you to join. Details on member benefits can be found at **thepfs.org/join**

4. I have completed the assessments within CPD Essentials, will these automatically appear in my CPD log?

If you have taken assessments within CPD Essentials these will automatically appear in your CPD log. For these to count as CPD activity you will need also to complete the remaining fields on the 'Add CPD activity' page. If you do not wish to record these as CPD activity there is an option to remove them.

5. I currently use the CPD planning and recording tool provided to PFS members (and/or the same within Financial Assess). Will information I've recorded here be automatically populated within CPD Essentials?

If you currently hold records across more than one of the CII's CPD systems you can combine this into one single record. There are two main options available to you:

1. Create a combined record within the free CII CPD planning and recording tool. To do so, log in to CPD Essentials or Assess and select 'Synchronise my CPD'.

2. Alternatively you can export/import your records between these tools so a single record can be maintained on the tool of your choosing. You can find instructions on how to do this within the CPD Essentials user guide.

FAQs

6. The date format on my CPD log isn't set to a UK format (day, month, year). Can I change this?

We are aware this issue occurs if you are using the Google Chrome web browser. You are able to change the date format within the settings functionality in Chrome, using the following instructions:

• Select the 'Customise and control Google Chrome' icon to display the drop down of options (top right)
• Scroll down and click on 'Settings'
• Scroll down and click on 'Advanced'
• Scroll down to the 'Languages' section
• Click 'Add languages' and select 'English (United Kingdom)' from the drop down list and click 'Add'
• Click the 'More Actions' icon next to 'English (United Kingdom)' then select the 'Display Google Chrome in this language' tickbox and choose 'Move to the Top'
• Close Chrome
• The change will be applied when you relaunch.

7. I've printed the learning material to read offline but the system has recorded only the time it took to print the pages. Can I amend my CPD log entry to show the time I subsequently spent reading?

You can record the time spent reading in another part of the system by clicking on the 'My Training Plan' heading, selecting to view 'All' activities, finding the relevant entry in the list and amending the time spent against it. If you export your CPD record as a CSV file, you can amend any of the details once it has been saved as an Excel workbook.

8. I belong to other professional bodies/get my SPS from elsewhere. Will this satisfy my CPD requirements for those bodies?

CPD Essentials is based around FCA retail investment adviser CPD requirements as required under the conditions of the CII CPD scheme for all qualified Chartered Insurance Institute/Personal Finance Society members. In this regard, activity undertaken within CPD Essentials can be used to satisfy your membership CPD requirements.

CPD requirements vary between professional/accredited bodies, so if you are a member of a body other than the Chartered Insurance Institute/Personal Finance Society, we recommend you check the details of their requirements before purchasing CPD Essentials to ensure activity undertaken here will be acceptable. You can use CPD Essentials to record details of all CPD activity, including that undertaken outside the Chartered Insurance Institute/Personal Finance Society, allowing you to keep a single record of all your CPD in one place.

9. I've purchased CPD Essentials for a number of employees and one has left the organisation. Can I reallocate their CPD Essentials licence to another member of staff?

No, it is not possible to transfer licences. They are sold on a per person basis, so additional licences would need to be purchased for anyone new that you wish to have access to the system.

10. Where can I find full details on the CII's CPD Scheme applicable to Chartered Insurance Institute/Personal Finance Society members?

Visit: **cii.co.uk/cpd** for full details including: what does the scheme involve, who needs to comply with this, acceptable activities, recording and submitting your CPD record and related FAQs.

11. What happens on renewal of CPD Essentials?

When you buy CPD Essentials the e-briefing programmes are automatically included in 'My Training Plan', providing a guide as to the learning and development that you need to undertake.

Upon renewal, the programmes will reset and reappear in 'My Training Plan', so that these are available to complete annually. These will include any updates or enhancements made to the e-briefings during the course of the year, reflecting market developments.

Should you choose not to renew, your CPD record will be archived. We will of course give you advance notice so that you can print or export a copy of your record.