



*The*  
Insurance  
Institute

# A guide to creating CPD events & eLearning

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# 1

# Accreditation

**For an activity to qualify as CPD, it must first be accredited by a body approved by the Central Bank of Ireland – such as The Insurance Institute. We accredit content for a variety of designations and qualifications, as well as the Retail Product Categories set out in the Minimum Competency Code.**

## **1.1. Designations/Categories**

We accredit CPD activities for APA (Personal, Commercial, Private Medical Insurance, Life Assurance or Pensions), CIP, MDI, CID, Dip L.A, CDip LA, Dip PMI, DLA, DLDU, DLDC and QFA designations, as well as the following product categories:

- Life Assurance
- Pensions
- Savings & Investments
- Personal General Insurance
- Commercial General Insurance
- Private Medical & Associated Insurances
- Mortgage Credit Agreements, Housing Loans, Home Reversion Agreements & Associated Insurances
- Consumer Credit Agreements & Associated Insurances

## **1.2. Types of Content**

We accredit the following activities for CPD, provided they relate to certain designations and/or Retail Product Categories:

- Conferences and seminars
- eLearning
- Examinations and tests
- Training courses and workshops
- Webinars

Examples of the types of activities we do not accredit include:

- Normal working activities
- General software/application training
- Plain English training
- Sales technique / communication / soft skills
- Social or networking events
- Non-insurance related exams

### **1.3. Duration**

- Lectures and e-learning modules must be a minimum of 15 minutes
- The maximum number of hours that can be accredited for a single topic within a day is 4.
- The maximum number of hours that can be accredited for an entire day is 8 hours.
- The maximum number of hours that can be accredited for a tested e-learning module is 2.

### **1.4. How to Submit an Event for Review**

- Events for accreditation must be submitted through the following portal - [www.iii-connect.com/login](http://www.iii-connect.com/login)
- If you don't have a Username and Password, please contact our Member Services team - [memberservices@iii.ie](mailto:memberservices@iii.ie) or Maria in CPD Accreditations - [cpdaccreditations@iii.ie](mailto:cpdaccreditations@iii.ie)
- A step-by-step guide on how to complete the application form, can be found [here](#).

### **1.5. Checklist for Submission**

Before clicking submit, consider the following questions:

- Does my material relate to a designation/Retail Product Category?
- Is it technical in nature? (e.g. claims, compliance, policy coverage, terms, conditions, warranties, legislation, risk management)
- Does the content directly relate to provision of customer advice?
- Is it relevant to Irish law and practice?
- Have I included enough detail? (You should submit your PowerPoint presentation for face to face lectures, and the presentation and a bank of questions for e-learning modules) ·
- Is my event scheduled to take place in an appropriate location?

If you answered no to any of these questions, we will be unable to accredit your activity.

### **1.6. Accreditation Confirmation**

Once you have made a submission for accreditation, we will revert within 2 weeks (if all required information has been provided).

# 2

## Face to face CPD

**To ensure the CPD you deliver is of an excellent standard and in keeping with Central Bank requirements, we have created the following guidelines for before, during and after the event.**

### **2.1. Before the Event**

First, you must ensure the event has been accredited by The Insurance Institute (see Section 1 of this guide). This should be submitted for accreditation at least 14 days prior to your event taking place.

### **2.2. On the Day**

Attendees must sign in at the start of the first lecture and out at the end of the multi lecture event. If an attendee leaves prior to the end of the event, you should take note as that person will NOT be entitled to claim the full CPD

### **2.3. After the Event**

#### ***Confirmation of attendance***

After the event you, should issue a confirmation of attendance to all attendees. If you hosted a multi CPD lecture event, you should issue a separate confirmation for each lecture.

A template confirmation of attendance certificate is available for use under your Submitter/Compliance login. The login will be allocated to you (if not already done so), when you go to submit your first event for accreditation review.

**If you issue the confirmation of attendance via email, the email must be individually addressed to each recipient. All attendance certificates should be issued in PDF format only.**

#### **Sign in sheets**

You must retain a copy of your sign in sheets for a minimum of 6 years. In the event of a CPD audit, attendees may request a copy of their confirmation of attendance from you, so it is essential you retain these on record.

# 3

## eLearning

**E-learning modules are becoming increasingly more popular and are excellent formats for CPD, as they allow participants to become actively involved.**

### 3.1. Designing the eLearning Module

Here are some considerations when designing your eLearning modules:

- Ensure your module is generally well-designed. It should be divided into sections and be easy to read and navigate.
- It should be highly interactive with frequent exercises and questions
- The module should contain a range of media – i.e. a combination of text, animations, audio and video
- It should contain an assessment that participants must pass to be awarded CPD.

### 3.2. Assessment

Assessments provide evidence that participants have gained the intended knowledge and skills from your e-learning course. You will need to provide a question bank greater than the number of questions in the test – use this table as a guide.

Duration of module	Minimum number of questions required in bank	Minimum number of questions required in test	Minimum number of correct answers required to pass
0.25 hr	6	3	2
0.5 hr	12	6	4
1 hr	24	12	8
1.5 hr	36	18	12
2 hr	48	24	16

The standard minimum pass mark is 65%.

### 3.3. Completion Certificates

You should issue a Certificate of completion to all those who complete eLearning modules. A template Certificate of completion is available for use under your Submitter/Compliance login. The login will be allocated to you (if not already done so), when you go to submit your first event for accreditation review.

If you issue the certificate of completion via email, the email must be individually addressed to each recipient.

All Completion certificates should be issued in PDF format only.

# 4

## Webinars

### 4.1. Live Webinars

**Minimum requirements for live webinars include the following:**

- Speaker should be able to engage with those participating in the webinar ie systems in place so that questions raised by participants can be answered during the live webinar.
- Should be a minimum of 4 questions (per hour) peppered at random, throughout the webinar, to test that the person is attending and participating in the live webinar.
- Should be systems in place to identify those who do not remain signed in for the full duration of the webinar and also those who do not answer (correctly), the random questions. Those identified should not be allowed to claim CPD for the event.

### 4.2 Pre-Recorded Webinars

- For pre-recorded webinars, you should submit a question bank to support the event. The number of questions required will depend on the duration of the webinar (see the eLearning question bank requirement for further detail).

**\* The minimum pass rate is 65%**

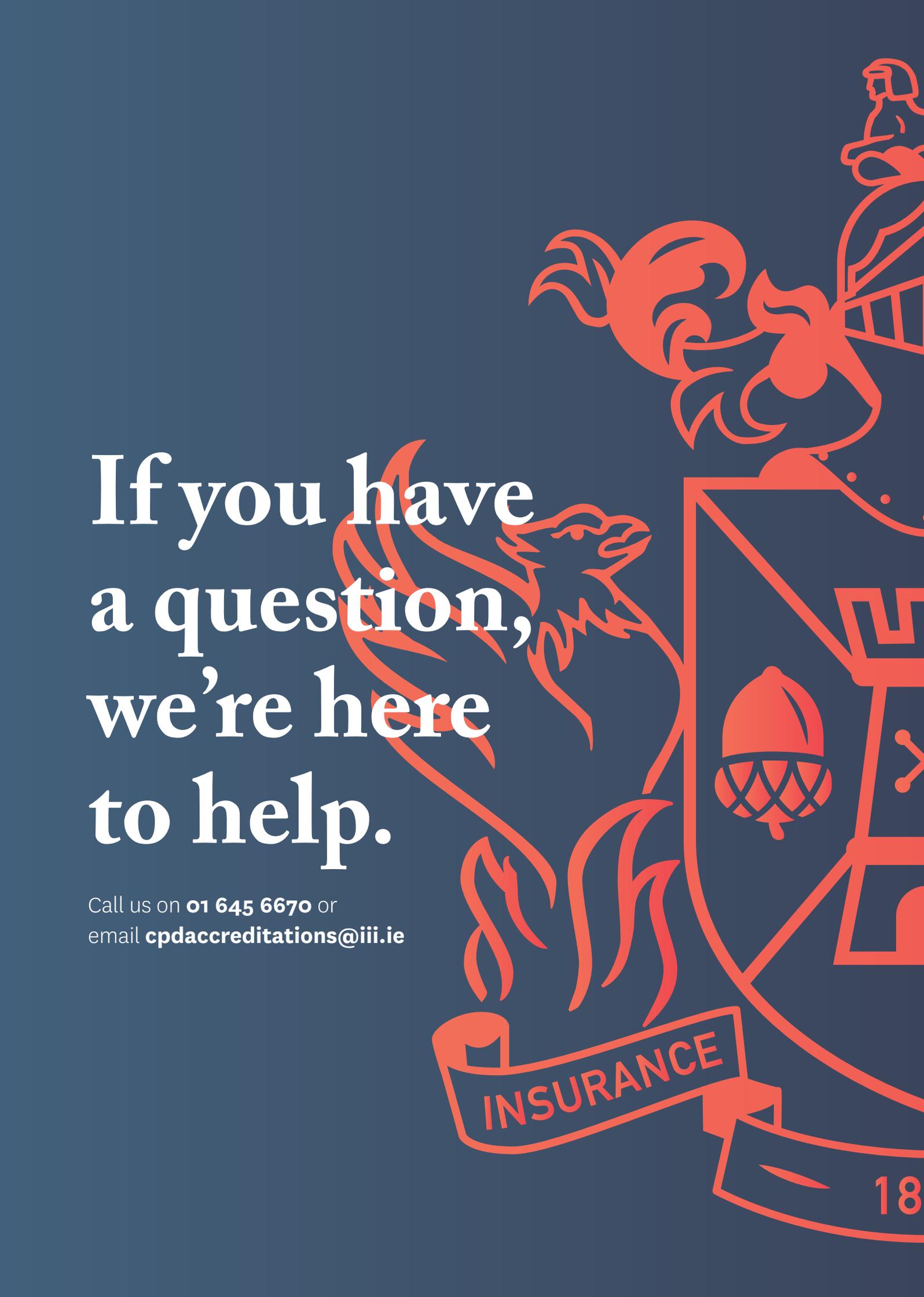
### 4.3 Certificates of Attendance/Completion

You should issue a Certificate of completion/attendance to all those who complete/attend the Webinar (live/recorded). Templates of the Certificates are available for use under your Submitter/Compliance login. The login will be allocated to you (if not already done so), when you go to submit your first event for accreditation review.

If you issue the certificates via email, the email must be individually addressed to each recipient. All certificates should be issued in PDF format only.

### 4.4 Events Already Accredited by the LIA/IOB

The Insurance Institute/LIA and IOB accept each other's accreditation decisions. If the LIA/IOB have already accredited an event for you, please attach a copy of their confirmation of accreditation notice to your submission (when submitting it through our CPD system). From there, we will add the event to our CPD system, without having to review the content of the event.



If you have  
a question,  
we're here  
to help.

Call us on **01 645 6670** or  
email **[cpdaccreditations@iii.ie](mailto:cpdaccreditations@iii.ie)**

**INSURANCE**