Instructions for completing CPD Return on portal:
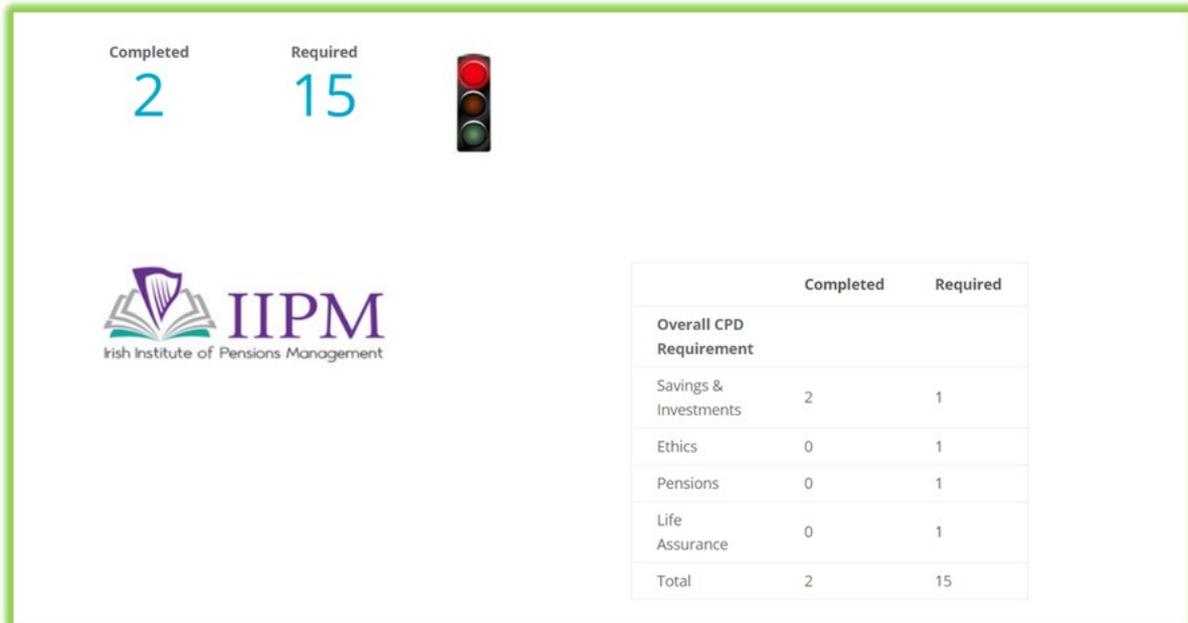
If a user has not completed the mandatory requirements, the traffic light will display red:

Use the "log cpd link" to add courses completed to their record:

Can search for completed courses and click the plus to add to their completed records:

Note that users can use the panel on the left to search or use Ctrl+F – the same as any browser/office system

Name	Provider	Hours	Date	Category	Actions
My Future (MCC3)	Aviva	1	03-03-2020	Savings & Investments	
My Future (MCC2)	Aviva	1	03-03-2020	Pensions	
Global Macroeconomic Outlook (MCC2)	IAPF	1.5	29-01-2020	Pensions	
Global Macroeconomic Outlook (MCC3)	IAPF	1.5	29-01-2020	Savings & Investments	
IAPF Trustee Training Refresher (MCC2) - March	IAPF	4	03-03-2020	Pensions	
IAPF Trustee Training Refresher (MCC2) - May	IAPF	4	06-05-2020	Pensions	

Partial Name Search

[   ]

[Submit]

-OR-

Filter Selection

- ☑ All
- ☐ Savings & Investments
- ☐ Ethics
- ☐ Pensions
- ☐ Life Assurance

[Filter]

Confirmation is required to ensure that they have selected the correct course for their record:

The course you selected is:
IAPF Trustee Training Refresher (MCC2) - March

The date of this course was : 03-03-2020

Do you wish to add this course to your completed C.P.D. listings?

[COMPLETE]

---OR---

Click To Return To List

Even if a user has completed 15 hours, they still need to ensure that they have completed all the requirements i.e. 1 hour from each category:

	Completed	Required
Overall CPD Requirement		
Savings & Investments	7	1
Ethics	4	1
Pensions	4	1
Life Assurance	0	1
Total	15	15

Completed **15** Required **15**

When the requirements have been met, the traffic light system will show green and the button will be available to "Complete CPD Return"

Completed **16** Required **15**

	Completed	Required
Overall CPD Requirement		
Savings & Investments	7	1
Ethics	4	1
Pensions	4	1
Life Assurance	1	1
Total	16	15

Complete CPD Return

To finalise the completion, ensure that the return details are correct, tick the box to confirm that the requirements have been met and click complete:

Once they have completed, they are informed the following completion message: