

CONTINUING
EDUCATION
ESSENTIALS

FOR PDU
RECORD MANAGERS

HOW TO REGISTER MULTIPLE ADVISORS FOR THE CSF'S CONTINUING EDUCATION ACTIVITIES

✚ Step-by-step guide to multiple registrations ✚



Chambre
de la sécurité
financière

IMPORTANT

Before proceeding with multiple registration, you must ensure that you have your login ID if you are a CSF member or send us an email request to info@chambresf.com to create a guest account.

STEP 1

Access your CSF member record

First, log in on the CSF website (chambresf.com).

- 1 Click on **Log in**.
- 2 Enter your 6-digit certificate number (this number is listed in the AMF's Register of firms and individuals authorized to practise) and your password.
- 3 Click on **Log in** and continue with Step 2 of this guide.

The screenshot shows the CSF website's login page. At the top right, a 'Log in' button with a user icon is highlighted with a blue box and a callout '1'. Below the navigation bar, the 'Connexion' section is visible. On the left, the 'Member login' form has two input fields: 'Certificate number of l'Autorité des marchés financiers*' and 'Password*'. A callout '2' points to the first input field. Below these fields is a 'Forgot your password?' link. A 'Log in' button is at the bottom of the form, with a callout '3' pointing to it. To the right of the form is a 'First time login?' section with instructions and an 'Activate my account' button.

STEP 1

Access your guest account

If you are not a member and **you have not created a guest account on the CSF website**, you must send us an email request to info@chambresf.com to obtain a guest (non-member) account. Please provide us with the email address that will be used for your guest account as well as your first and last name.

We will then send you your login information.

If you have already created a guest account on the CSF website.

- 1** Under **Guest login**, enter your email address and password.
- 2** Click on **Log in** and continue with Step 2 of this guide..

The screenshot shows a 'Guest login' form. At the top right is a 'Member access' button. Below the title are two input fields: 'Email*' and 'Password*'. A blue line with the number '1' points to both input fields. Below the password field is a link that says 'Forgot your password?'. At the bottom is a dark blue 'Log in' button, which is pointed to by a blue line with the number '2'.

STEP 2

Access the multiple purchases module

- 1 In the top menu bar, click on **Professional development**.
- 2 Select **Multiple continuing education purchases**, then click on **Learn more**.

The screenshot shows the CSF website interface. The top navigation bar includes links for News & Events, Contact Us, Careers, FAQ, Info COVID-19, and Français, along with a Sign In button. Below this, the main navigation bar features the CSF logo, 'Protection of the public', 'Professional development' (highlighted with a box and a line pointing to step 1), 'InfoDéonto', and 'About the CSF'. A breadcrumb trail shows 'Home / Connexion'. The main content area contains three cards: 'Multiple continuing education purchases' (with a 'Learn more' link highlighted by a box and a line pointing to step 2), 'Guides and forms' (with a 'Learn more' link), and 'Continuing Education Provider' (with a 'Learn more' link). A callout box at the bottom right, labeled with a '3' and a line pointing to step 3, contains the text 'Make multiple registrations'.

1

2

3

Make multiple registrations

- 3 To proceed, click on **Make multiple registrations** and continue with Step 3 of this guide.

STEP 3

Register representatives

You must obtain the following information before beginning the registration process:

- 1 The certificate number of the representatives you are registering. Note that multiple registration does not accept guest registration. Non-members may, however, register individually for continuing education activities on the CSF website.
- 2 Check the balance available on the credit card that will be used for purchases (all purchases must be made with a credit card).
- 3 If you are performing multiple registrations for ProAdvice (2019-2023 mandatory course) or ProEthics (the previous mandatory course), check with the member which formula suits their practice best. Consult the various options available in our catalogue of 100% CSF continuing education activities.

- ✓ Registering groups of 20 to 30 people at a time is recommended even if there is no limit to the number of registrations.
- ✓ Only CSF members may be registered via the multiple registration method.
- ✓ It is not mandatory to choose the same continuing education activity and the same language for all members being registered.
- ✓ Purchases are non-refundable and non-exchangeable. They are valid for six months after the purchase date, except for ProAdvice which will remain in the member's file until November 30, 2023.
- ✓ The formula or continuing education activity chosen may not be changed once registration is completed.
- ✓ One single transaction receipt will be issued for all registrations. Therefore, it is important to keep the transaction receipt as it will not be added to the files of registered members.
- ✓ Only one payment method: credit card.
- ✓ Adding PDUs: when the activity has been completed and the representative has finished the satisfaction survey, the PDUs are automatically added to their record.

STEP 3

Register representatives

Proceed with multiple registration

- 1 Under **Certificate number**, enter the representative's certificate number (6 digits). This number is also called the PDU access code in the AMF's [Register of firms and individuals authorized to practise](#).
- 2 Under **Subject**, select **All Trainings**, then choose the continuing education activity you want to add to the representative's record from the drop-down menu.

MULTIPLE REGISTRATIONS Order confirmation
Step: 1 2 3 4 5 Selection of representatives

Before going ahead with multiple registrations:

- Please have on hand the **certificate number (6 digits)** of the member who wants to register. This number is listed in the Autorité des marchés financiers' Register of firms and individuals authorized to practise.
- Check the balance available on the credit card that will be used for purchases (all purchases must be made with a credit card).
- If you are dealing with multiple registrations for ProAdvice (2019-2023 mandatory course) or ProEthics (the previous mandatory course), please check with the member which formula suits their practice best. Consult the various Continuing education courses available in the Professional Development section on the Chambre's website.

Reminder

- Only members of the Chambre de la sécurité financière can be registered via this method.
- It is not mandatory to choose the same training activity and the same language for all members to register.
- Registering groups of 20 to 30 people at a time is advisable. There is no limit to the number of registrations.
- Purchases are non-refundable and non-exchangeable. They are valid for six months after the purchase date, except for ProConseil which will remain in the member's file until November 30, 2023.
- The formula or course chosen may not be changed once registration is completed.
- One single transaction receipt will be issued for all registrations.

1 Certificate number 225776 Language English Subject All Trainings Continuing education courses The ins and outs of the RESP - 6 PDU in SPB Display the name and validate

Add to selection

2

- 3 Next, click on **Display the name and validate**. A message may appear in red if this representative is already registered for this activity or if they do not exist in the database. In this case, check that the information on their certificate is correct by consulting the [Register of firms and individuals authorized to practise](#) on the AMF's website.

This representative has already been registered for this training or another training in the same group.

| Last Name, First Name | Certificate number |
|-----------------------|--------------------|
| CASSION, CARTER | 225776 |

3

This member does not exist.

Last Name, First Name

STEP 3

Register representatives

Proceed with multiple registration (continued)

- 4** Check that the name of the representative you are registering is correct.
If not, enter the correct certificate number and click on **Display the name and validate**.
- 5** If it is the correct representative, click on **Add to selection**.
- 6** When you add the representative to the selection, their name, certificate number and chosen bundle will appear in the list at the bottom of the entry screen.
- 7** To delete a name from the list, click on [X]. To delete all the names from the list, click on **Delete all**.

The screenshot shows a registration interface. At the top, there is a text input field for the representative's name, followed by a button labeled "Add to selection". Below this is a table with three columns: "Last Name, First Name", "Certificate number", and "Continuing education courses". A "Delete all" button is located at the top right of the table. The table contains one row with the data: "CASSION, CARTER", "225776", and "The ins and outs of the RESP - 6 PDU in SPB". A small "X" icon is visible at the bottom right of the table row.

| Last Name, First Name | Certificate number | Continuing education courses | |
|-----------------------|--------------------|---|---|
| CASSION, CARTER | 225776 | The ins and outs of the RESP - 6 PDU in SPB | X |

When you have finished entering all the representatives for registration, click on **Next**.
Note that in the next step, you can go back by clicking on **Previous**.

STEP 3

Register representatives

Proceed with multiple registration (continued)

- 8 Confirm the purchase details displayed: bundle title, language, PDU, price, quantity, subtotal, taxes and total.
- 9 Terms of purchase. You must check off **I have read and I accept the terms of purchase** to proceed to the next step.
Before checking it off, click on the Terms of purchase link and read the information.
Note: If you wish to end the transaction and empty your cart, click on **Cancel**.
- 10 To continue with your purchase, click on **Next**.

MULTIPLE REGISTRATIONS Order confirmation
Step: 1 2 3 4 5 Confirm selection

Continuing education courses

| | Language | Product code | Type | PDU | Price | Quantity | Subtotal | |
|--|----------|--------------|--------|-----|---------|----------|----------|-------------------------------------|
| 5 ProAdvice For professionals in insurance and group insurance - 4 PDU in CO | English | 52606LIAN | Online | 4 | \$80,00 | 1 | \$80,00 | <input checked="" type="checkbox"/> |

☐ I have read and I accept [the terms of purchase](#).

Subtotal: \$80,00
GST (875755423): \$4,00
QST (1022122980): \$7,98
Total amount: \$91,98

CANCEL PREVIOUS **NEXT**

9 8 10

STEP 3

Register representatives

Proceed with multiple registration (continued)

- 11** Confirm the client's information (name, address, telephone number and email).

Note : The information can only be modified for this purchase.

The changes will not appear in the AMF's [Register of firms and individuals authorized to practise](#).

For mutual fund and scholarship plan representatives, mailing address changes must be made directly by your firm or directly in the NRD.

For insurance representatives, the mailing address can be changed directly via the AMF's E-Services.

- 12** Uncheck **Email notification to individual(s)** if you do not want those registered to receive an email informing them that they have been registered for the activity.

MULTIPLE REGISTRATIONS Order confirmation
Step: 1 2 3 4 5 Confirmation of customer information

Name: CARTER CASSION

Address: 2000, McGill College

City: Montreal

Province/State: Quebec

Zip code: H3A 3H3

Email address for receipt: info@chambresf.com

☒ Email notification to individual(s)

STEP 3

Register representatives

Proceed with multiple registration (continued)

- 13** To continue with the purchase, click on **Next**.
- 14** Complete payment online and close the application.

Multiple registration is complete.

| Item Details | | | | |
|---|--------------|----------|----------|----------|
| Description | Product Code | Quantity | Price | Subtotal |
| The RREGOP : learning more to help clients to make the right choices - 3 PDU in GIP | 20751L2AN | 1 | \$96.00 | \$96.00 |
| Voluntary retirement savings plan (VRSP): getting the facts to provide informed advice - 1 PDU in CO and 1 PDU in GIP | 32140L2AN | 1 | \$64.00 | \$64.00 |
| Life insurance products - 3 PDU in IP and 1 PDU in GIP | 27644L2AN | 1 | \$128.00 | \$128.00 |
| | | | | |
| GST: | | | | \$14.40 |
| PST: | | | | \$28.73 |
| Total (CAD): | | | | \$331.13 |

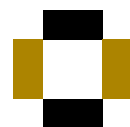
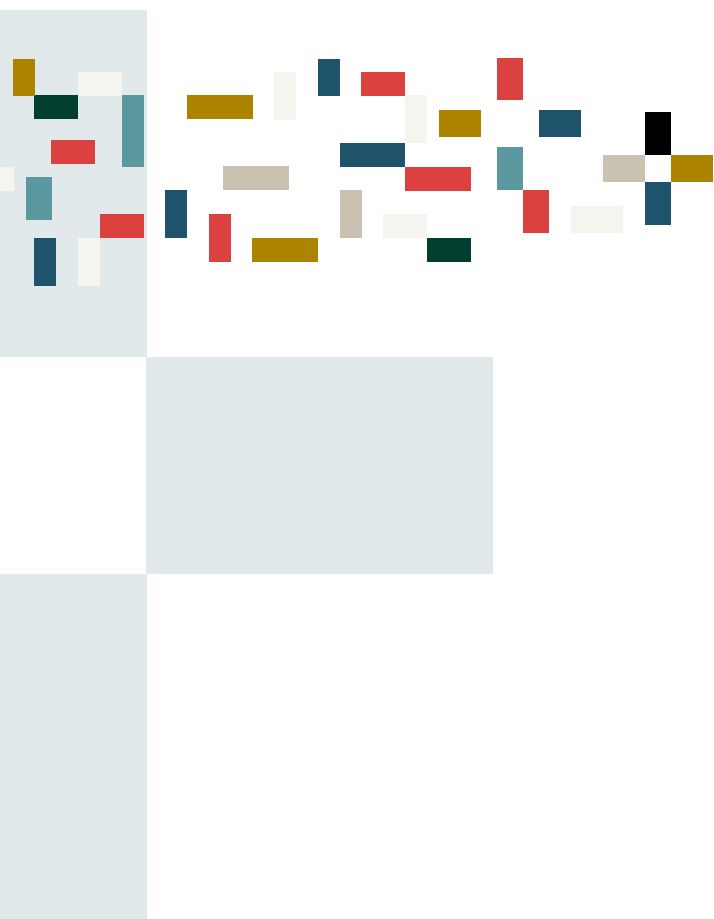
Contact us

Information centre

Phone: 514-380-3011
Toll free: 1-888-380-3011
Fax: 514-282-3418

info@chambresf.com





**Chambre
de la sécurité
financière**

A PLUS FOR PROTECTION
A PLUS FOR THE PROFESSION

© Chambre de la sécurité financière
All rights reserved.