

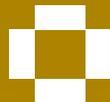
CONTINUING  
**EDUCATION**  
ESSENTIALS

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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](mailto: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 page title 'Connexion' is displayed. The main content area is divided into two sections: 'Member login' and 'First time login?'. In the 'Member login' section, there are two input fields: 'Certificate number of l'Autorité des marchés financiers\*' and 'Password\*'. A 'Guest login' button with a question mark icon is located above the certificate number field. A 'Log in' button is positioned below the password field, with a callout '3' pointing to it. A link for 'Forgot your password?' is also present. In the 'First time login?' section, there is a question about account activation and an 'Activate my account' button. A callout '2' points to the certificate number input field.

## STEP 1

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# 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](mailto: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 callout '1' points to both of these fields. Below the password field is a link for 'Forgot your password?'. At the bottom is a dark blue 'Log in' button, which is pointed to by a blue callout '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 top navigation bar of the CSF website. The menu items are: News & Events, Contact Us, Careers, FAQ, Info COVID-19, Français, and Sign In. Below the navigation bar is the CSF logo and the text "Chambre de la sécurité financière". The main navigation menu includes: Protection of the public, Professional development, InfoDéonto, and About the CSF. The "Professional development" link is highlighted with a blue box and a callout "1". Below the main navigation is a sub-menu with "Home / Connexion". The main content area is divided into three columns: "Multiple continuing education purchases", "Guides and forms", and "Continuing Education Provider". The "Multiple continuing education purchases" column has a blue box around the "Learn more" link with a callout "2". The "Continuing Education Provider" column has a blue box around the "Learn more" link with a callout "3". A blue callout box at the bottom right 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

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# 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.

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

- 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

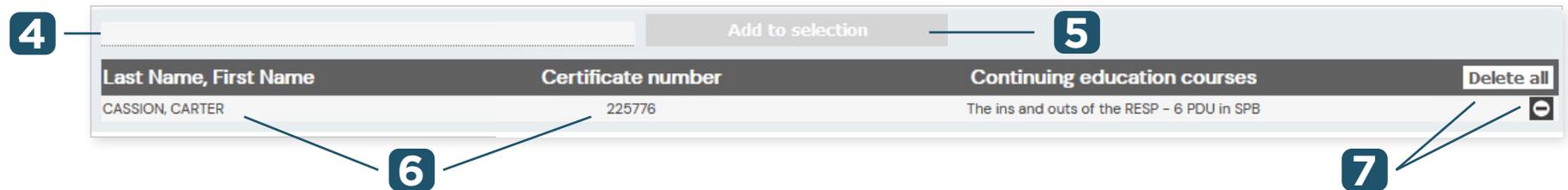
Last Name, First Name

## 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**.



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

CANCEL PREVIOUS **NEXT**

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

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
			<b>Total (CAD):</b>	<b>\$331.13</b>

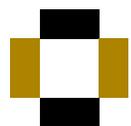
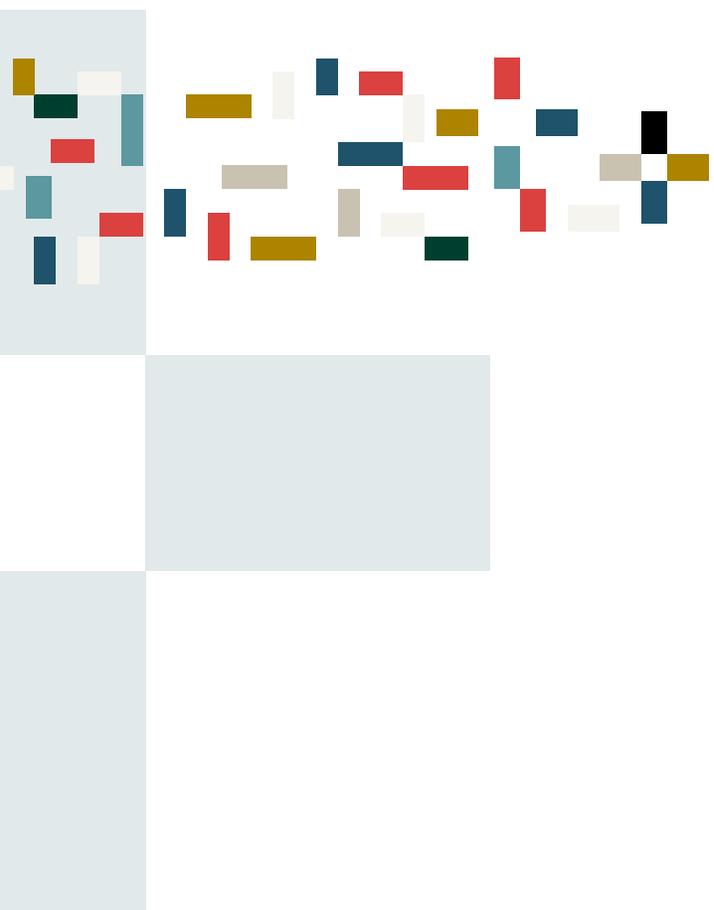
## Contact us

### Information centre

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

[info@chambresf.com](mailto:info@chambresf.com)





**Chambre  
de la sécurité  
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**A PLUS FOR PROTECTION  
A PLUS FOR THE PROFESSION**

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