

ALUCA CPLI FAQ's

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Frequently Asked Questions (FAQ's)

Q1. How can I become an ALUCA accredited CPLI (Certified Professional - Life Insurance) member?

You need to have gained educational qualifications that will position you at a higher level of membership in addition to the number of years and experience you have gained in Life Insurance. These also tie into the different levels and competencies of the ALUCA competency framework which is set out in the table below.

Accredited Level	Education Points	Years in LIFE Insurance	Competency Framework
Affiliate CPLI	1-3	2-4	Level 1 - 2: Core
Associate CPLI	4-7	5-9	Level 2 - 3: Core to Advanced
Associate Fellow CPLI	8+	10+	Level 3 - 4: Advanced to Expert
Fellow CPLI	8+ paper	15+	Level 4: Expert

Q2. I have general insurance /CTP/marine experience, does this count towards my accreditation and CPD?

No - this accreditation is very specific to Life Insurance only. Even though you may have educational qualifications that put you at a high level of membership - the number of years and experience you have gained in Life Insurance is just as important, so you will need to start at the membership and accreditation level specific to your years of experience spent working as a professional in Life Insurance only and your CPD only relates to Life Insurance.

Q3. I am a Rehabilitation/Medical professional and have worked in workers comp/ hospitals/clinical practise for many years can I claim this?

No - this accreditation is very specific to Life Insurance only. Even though you may have educational qualifications that put you at a high level of membership - the number of years and experience you have gained in Life Insurance is equally as important, it is for this reason that you will need to start at the membership and accreditation level specific to your years of experience working as a Rehabilitation or Medical professional in **Life Insurance only**.

Q4 I have many years experience in Life Insurance but do not have educational qualifications can I become accredited?

There are a couple of options open to you. Firstly you may be able to gain an educational qualification in life insurance via recognised prior learning (RPL). ANZIIF provide this opportunity via their Recognition of Prior Learning (RPL) process where they will evaluate what you have learned either formally or informally and potentially provide a credit to a full or part ANZIIF qualification where appropriate. You can find out more about this on their website :anziif.com/education/recognition-of-prior-learning. The next option is to look at undertaking some formal educational qualifications. We have some suggested courses that you may want to consider on ALUCA's website aluca.com/careers/continuing-education/

Q5. Does ALUCA provide an online recording tool for my CPD?

Yes. We provide a free, simple-to-use online recording tool which you may use to record your hours-based CPD. This is a self service tool that can be accessed via ALUCA's website in the Members centre only and is specific to your membership: aluca.com/members-area/

You will need to enter details of all CPD undertaken, including that completed through ALUCA, as this is not automatically recorded. We are working on including functionality that will automatically record details of your attendance at any ALUCA event and will communicate details once that happens.

Q6. What are ALUCA's continuous professional development (CPD) requirements?

All ALUCA accredited CPLI members will need to complete a minimum of 35 hours' compulsory CPD in a 12 month period. However 35 hours is only the *minimum* required by ALUCA; in practice, the figure required may exceed this, as the actual requirement will be determined by an individual's development needs in any 12-month period and will also be a discussion that the member needs to have with their organisation. **It is important to note that this CPD requirement is not generally an additional requirement to development activity ordinarily undertaken in the course of an individual's employment, but incorporates this.**

Q7. How was the figure of 35 hours CPD obtained?

In common with other professional bodies such as the Chartered Insurance Institute in the UK, the requirement for 35 hours or more of CPD is common. It is also important to set a minimum number of hours of CPD per year as a benchmark for accredited members. ALUCA's CPLI accreditation is an indication to the public that accredited members keep their professional knowledge current. During the course of any 12-month period, we encourage members to carry out a variety of CPD activities to help them keep their knowledge up-to-date. There is no maximum to the amount of CPD the member can carry out.

Q8. How to develop a CPD plan?

It is intended that all CPD activity should address an individual's professional development needs. It is up to the individual member to determine what their learning and development needs are which should be addressed via their continuous professional development. Members can then:

- Plan activities to address their learning and development needs (you may want to refer to ALUCA's high level competency framework which sets out key competencies for different career stages)
- Carry out activities to meet these needs
- Record the time spent for each activity and maintaining a verifiable audit trail of these activities
- A statement of the objectives achieved (i.e. answering questions like: "How this activity benefitted me professionally?") and including information about what you learnt.

Q9. How do I calculate the amount of CPD hours spent on an activity?

You should only count the actual time spent on the learning activity, e.g. if you attend a conference you should count only that time spent in activity that addresses identified development needs. You should always exclude the time taken for tea/coffee breaks and lunch.

Q10. Do I still have to complete the full 35-hour CPD requirement if I work part-time?

Yes. The requirement to maintain your knowledge and, in turn, your competence to undertake your role requires the completion of a minimum of 35 hours CPD, regardless of the total number of hours you work.

Q11. If I take a career break (e.g. maternity leave or long-term sickness), do I still have to complete the 35-hour requirement?

The CPD requirements will be suspended for the duration of your career break. If your CPD record is selected for validation purposes, we will ask you to provide evidence confirming your break in work.

Q12. I am an accredited member with CII and ANZIIF - do I still need to submit an ALUCA CPD diary?

If you are a current accredited member with CII or ANZIIF and complete their CPD requirements you may submit those diaries if you are audited by ALUCA instead of an ALUCA one - however this must be specific to Life insurance not general insurance.

Q13. When should I start creating a CPD log?

The requirement for undertaking CPD and keeping a record starts when a member becomes accredited (however we encourage all members to record their CPD for their own records and career goals) - this will be pro-rated for

that calendar year. For all existing accredited members it is for each full calendar year starting from 1 January each year. However, we recognise that the timing of members' annual CPD programmes may reflect other factors, such as the annual performance reviews or the CPD requirements of other professional bodies to which they belong. In these circumstances we may, at our discretion, recognise any such requirements.

Q14. Do I need to submit my CPD points to ALUCA automatically at the end of a 12-month period?

No. You only need to submit your record if ALUCA requests to see it. We will randomly sample a selection of members' records each year to check these have been fully and correctly completed.

Q15. If my CPD record is selected for review by ALUCA what will I need to provide?

You will need to provide your CPD record showing:

- a. the CPD activities you have undertaken in a 12 month period
- b. the points you have gained
- c. a statement/reflection of the objectives achieved against each activity.

It is recommended that you keep any evidence of the activity you have completed, for example, a certificate of attendance, as we may ask to see this if your record is selected for review. This can all be done via ALUCA's website in the Member's section where you can complete and record your CPD diary.

Q16. How do I know what development activity I should carry out?

Responsibility lies with each member individually as only they will know what development activity is required. In most cases, this will be agreed in conjunction with your employer, who will decide or advise what is relevant for your role and personal circumstances. ALUCA provides guidance for members via such services as the ALUCA Competency Framework which can be found in the members centre of the website.

Q17. If I am selected to submit my CPD record, which 12-month period do I need to provide?

You should supply your most recent annual record of CPD activity. For example, if we ask you to provide us with your record in January 2019 you need to supply your most recent completed plan for the period 01 January 2018 to 31 December 2018. Typically, where there is a gap of greater than one month since your last record was completed, we may also ask you to provide some more recent evidence of your CPD activity.

Q18. Does the online recording tool automatically record my attendance at ALUCA events?

No, not at present. We are investigating different options that would cater for this requirement and will communicate details once a decision has been reached.

Q19. What is the list of suitable CPD activities?

The list of suitable CPD activities is constantly being refined and updated to reflect evolving development activity. For the most current listing of suitable CPD activities please go to aluca.com.au

Q20. What is the list of educational points for accredited membership?

The list of suitable courses and activities is constantly being refined and updated to reflect evolving development activity. The most current list is provided below and is also on ALUCA's website aluca.com.au

ACCREDITATION: POINTS FOR EDUCATIONAL QUALIFICATIONS TABLE

INSTITUTION	COURSE	POINTS
G&T Risk Management	Trainee UW program	3
Appropriate Hospital or provider	Medical Terminology	1
Reinsurer or Insurer	Approved Training program	3
Personal Injury Education Foundation (PIEF)	Cert IV in Personal Injury Management (Return to Work)	2
PIEF	Cert IV in Personal Injury Management (Claims)	2
PIEF	Diploma of Personal Injury Management	4
INSTITUTION	COURSE	POINTS
PIEF	Graduate Certificate in Personal Injury Management	6

PIEF	Master of Personal Injury Management	8
Academy of Life Underwriting (ALU)	ALU101	2
ALU	ALU201	2
ALU	ALU202	2
ALU	ALU301	2
ANZIIF	Cert IV in Life Insurance	2
ANZIIF	Diploma of Life Insurance	4
ANZIIF	Diploma of Personal Injury Management	4
ANZIIF	Diploma in Financial Planning	2
ANZIIF	Diploma of Integrated Risk Management	2
Chartered Insurance Institute (CII)	Certificate in Insurance	2
CII	Diploma in Insurance	5
CII	Advanced Diploma in Insurance	8
CII	Fellowship	8
KAPLAN	Cert IV in Life Insurance - Underwriting	2
KAPLAN	Cert IV in Life Insurance - Claims	2
KAPLAN	Diploma in Financial Planning	2
University/TAFE	Master of Business Administration/Master of commerce	8
University/TAFE	Bachelor of Medicine/Medical Practitioner	8
University/TAFE	Bachelor Accounting/Actuarial/Law	8
University/TAFE	Bachelor Nursing/registered Nurse	6
University/TAFE	Bachelor Dietetics, Occupation Therapy, Physiotherapy	6
University/TAFE	Bachelor of Business/Commerce with a major in Insurance	6
University/TAFE	Bachelor of Psychology, Rehabilitation counselling, social work etc	6
University/TAFE	Other Allied Health bachelor degree or graduate diploma	4
University/TAFE	Bachelor of Business/Commerce with NO major in Insurance	4
University/TAFE	Unrelated tertiary education	2