

TTII's eLearning Academy Help Document

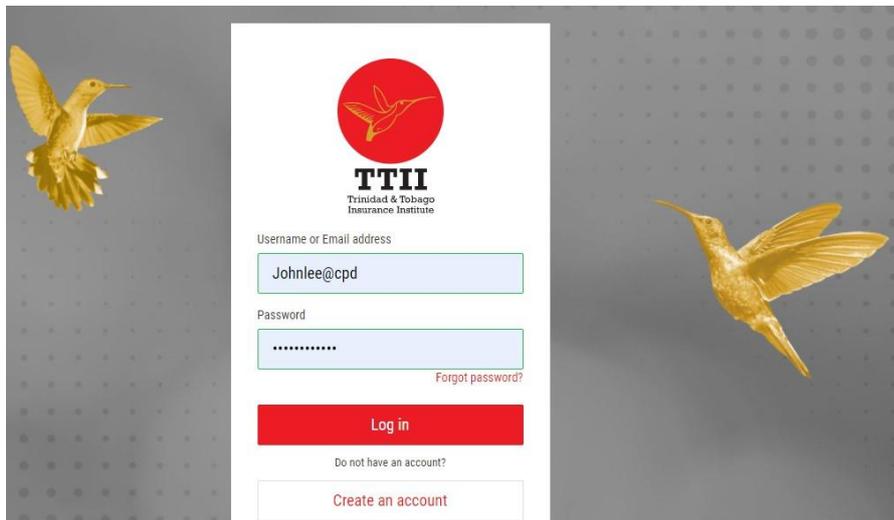
The purpose of this help document is to:

1. Show users how to sign up via self-registration and describe what to do when requesting bulk creation of accounts via batch upload on the platform.
2. Show users how to sign up (register interest and enrol themselves) for training within the platform.
3. Show and describe the purpose of supporting documents used within the platform.
4. Show users how to record and store CPD activity (evidence of training completed within, or off the platform) in their MY CPD account.
5. Show what needs to be done when an Intermediary has two licenses.
6. Provide questions and answers with regard to the features and functionality of the platform.

1. Show users how to sign up (self-register) on the platform.

Step 1. After registering with the TTII to be on boarded to platform a **registration code** will be sent to registrant's email to be used for self-registration on the platform (If the user's account is not already created by the TTII via bulk upload however, Company Administrators will receive an upload template). Users who are given the opportunity to self-register will be directed to the eLearning Academy's login page to create an account, while users of bulk created accounts will receive login information and ask to login with the same via the login page. Only the steps for self-registration will be shown here. To obtain the procedures for bulk creation of accounts, kindly send an email to admin@ttii.org.tt. See figure A below showing login page.

Figure A- Login page of TTII's eLearning Academy (CPD Platform)



TTII
Trinidad & Tobago
Insurance Institute

Username or Email address
Johnlee@cpd

Password
.....
[Forgot password?](#)

Log in

[Do not have an account?](#)

[Create an account](#)

Step 2. Click the **create account** button as seen in Figure A above.

Step 3. Form fields appear for self-registration as seen in figure B below

Figure B- Login page form fields used for the creation of registrant account.

TTTI
Trinidad & Tobago
Insurance Institute

Input your details to register an account

Username *

Johnlee@cpd

Password *

.....

Passwords should contain a mix of uppercase and lowercase alphabetic characters, and also numeric and special characters.

Confirm password *

First name *

Surname *

Email address *

Step 4. Continue the creation of account after filling out form fields by **selecting the checkbox acknowledging Terms and Condition and Privacy Policy**. Then select (click on) **“Create an account”** seen in **red**. See figure C below.

Note: A user cannot create an account without selecting checkbox.

Figure C- See checkbox and create account button

dd/mm/yyyy

License Reference Number (Life Insurance)

Date of Issue/Renewal Date (Life Insurance)

dd/mm/yyyy

Direct Contact *

Intermediary Type *

Access code *

By creating an account, I agree to the following:
[Terms & Conditions](#) | [Privacy Policy](#)

Create an account

Already have an account?

[Back to Log in](#)

Step 5. To finalize creation of the account an email will be sent to the email address provided in the form fields. The registrant will be required to click the verification link in the email or copy and paste in a browser and they will be redirected back to the platform where the creation of the account will be confirmed as completed. The registrant (user) can then log into the eLearning Academy with their **Username and Password** now. See figures D and E below

Figure D- Instruction that email will be sent to you

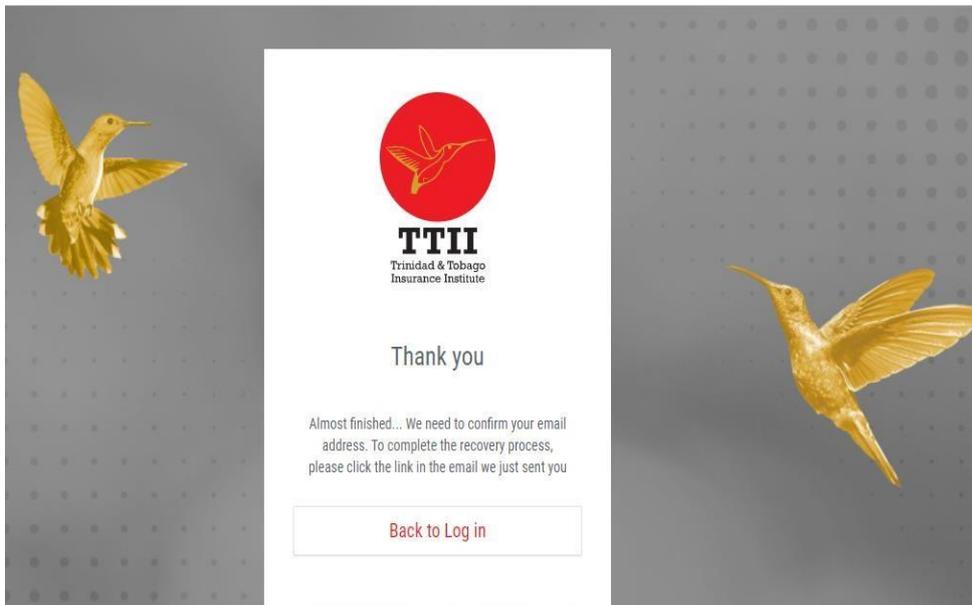
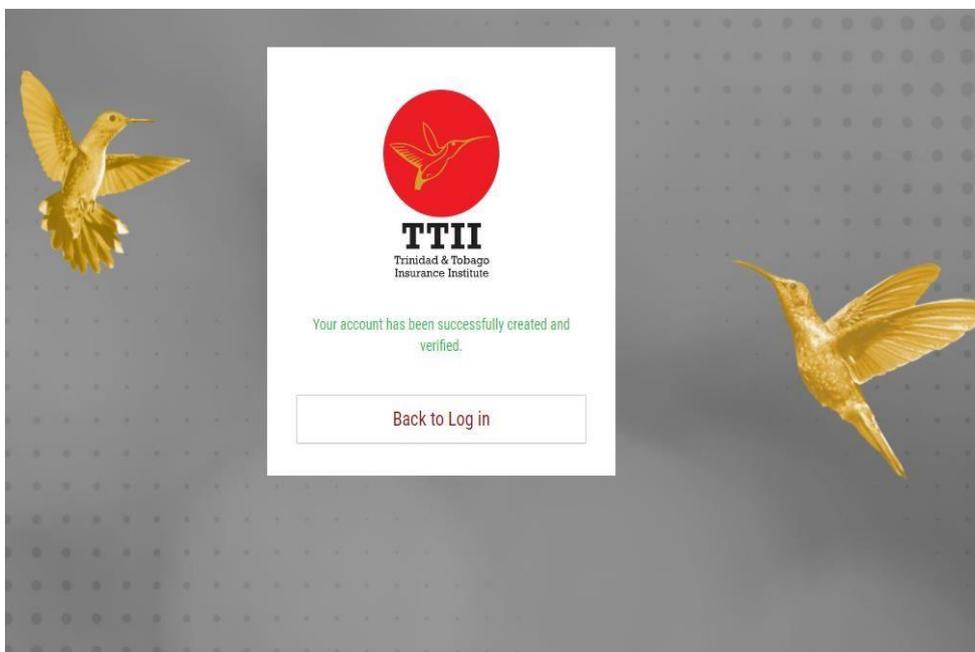
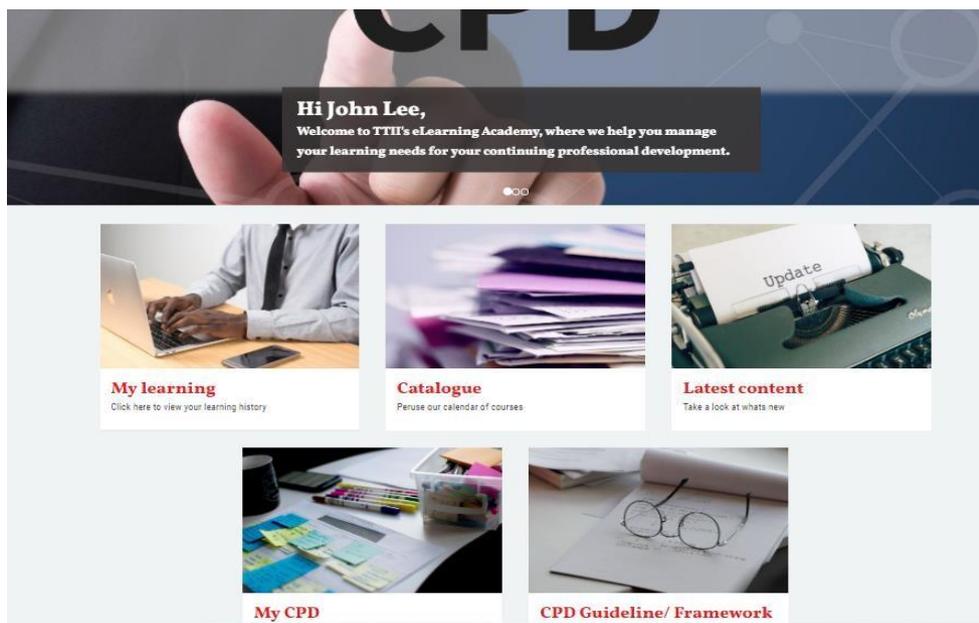


Figure E-Confirmation that the account has been created successfully after clicking verification link



Step 6. Click “back to login” as seen above and log into your account

Figure F – See TTII’s eLearning Academy below (home page)



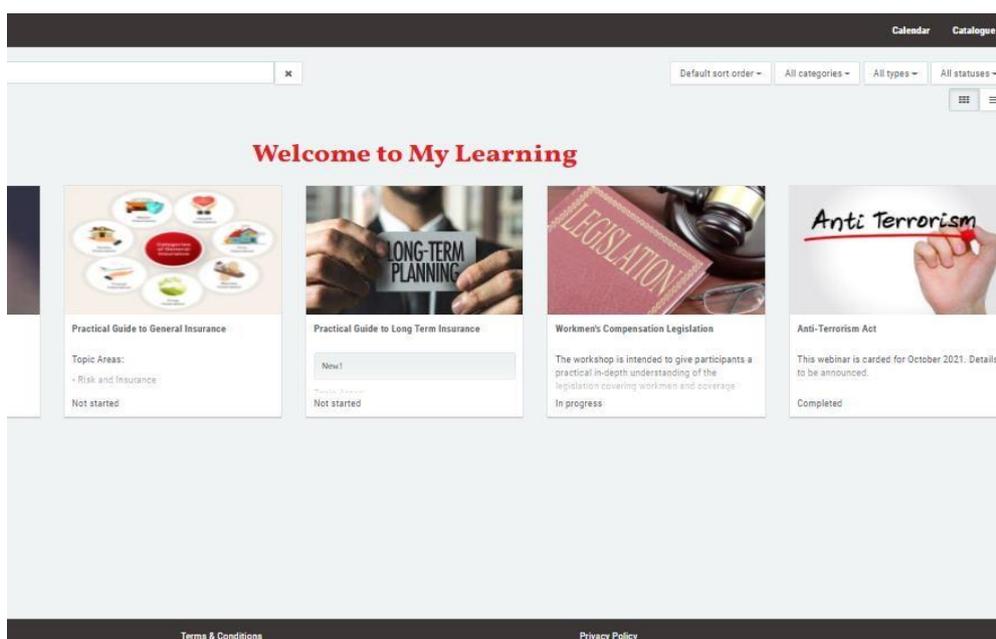
This completes the process of self-registration on the platform.

2. Show users how to sign up (register interest and enrol themselves) for training within the platform.

Users desiring to undertake CPD training via the platform will be accessing the “**My learning**”; “**Catalogue**”; and “**Latest Content**” sections of TTII’s eLearning Academy (CPD platform).

In the **My learning** section users can register interest and enrol for CPD training via the platform (see figure G). **Not started** represents training the user may or may not have enrolled in, but registered interest, and the training has not yet started; **In progress** represents training the user is currently doing; and **completed** represents training the user has finished. See figure G below.

Figure G- See example of user’s learning history here



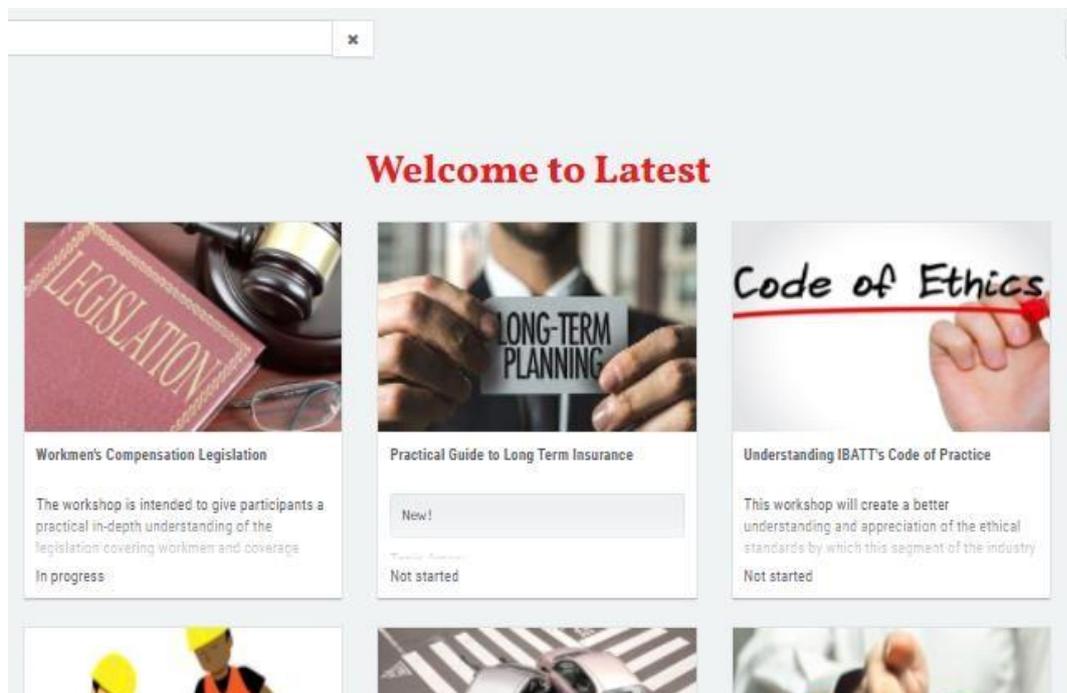
The **Catalogue** section is where all the CPD training within the platform can be accessed. See figure H below

Figure H- Example some of the Catalogue or listing of CPD training available on system.



In the **Latest Content** section users will see everything that is in Catalogue section, however all new CPD training introduced within the platform will be seen from the top left to the right and from left to right again on each row. See figure I below

Figure I- New Content Introduced to user from left to right



Step1. To register interest the user will click the “register Interest” button in green. An email will be sent to the user showing summary details of the training and to inform them they will be contacted about their interest.

Step 2. When a new session is created for the training (see figure I-E below), a TTII global administrator will add a user to the session or **give users the option to self-enrol** and the session will appear with the **enrol button in green** in the user's **My Learning, Catalogue, Latest Content and Calendar**.

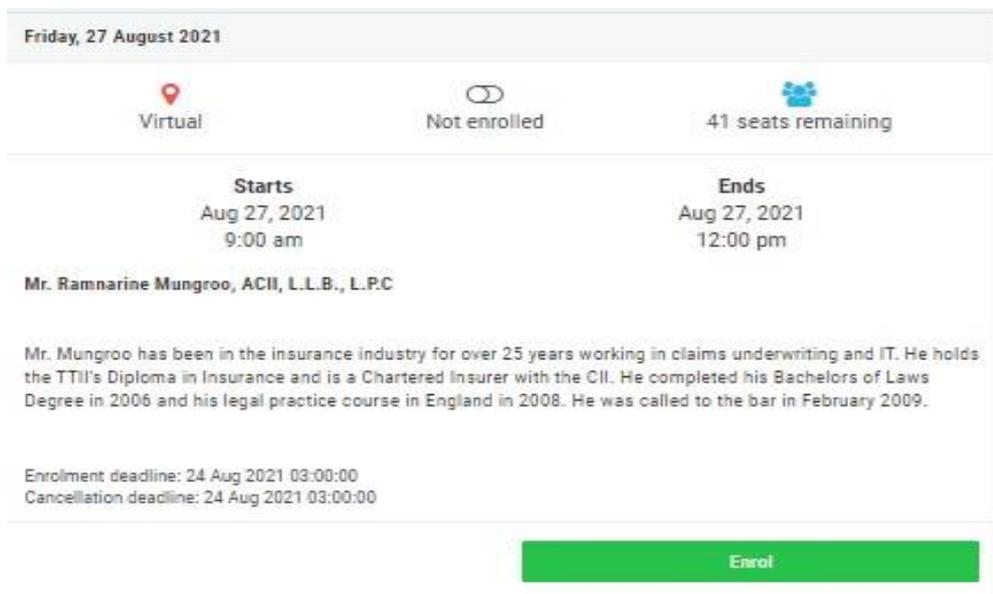
Step 3. The user can choose either of these sections to enrol themselves.

Note: A TTII global administrator can also enrol you straight into a training session without giving you the option to self-enrol. You will be notified if this happens. See Figure I-R and I-E below

Figure I-R- Register interest button (give it 3 seconds after clicking)



Figure I-E- The self-enrolment button below will turn red, or disappear when selected



This brings to an end the process of signing up for training on the eLearning Academy.

3. Show supporting documents used within the platform for users.

In the **CPD Guideline and Framework** section of the platform there are documents there to help users understand what is a CPD and its purpose under this CPD regime, the verification process, important platform functionalities, CPD weightings etc. This section also includes the TTII and CBTT FAQs, as well as a support video. The framework can be used to help guide the user to choose their CPD activity (type of training) and the associated weighting for each. See Figure J below.

Figure J- CPD Guidelines and Framework



4. Show users how to record and store CPD activity (evidence of training completed within, or off the platform) in their MY CPD account.

In the MYCPD section users can access the features and functionality of the record store used to upload evidence and track CPD activity completed for obtaining the CPD Hours (also called credit/points) needed under this CPD regime. In figure K below the user will observe that the record store has a **status** in top left-hand corner saying **in progress**. To the right are **two graphs**; and below there is an **add entry, submit for review, export entries** and **help** button. There is also a section for **journal entries** (the part with **title, type, date** and **complete**).

Figure K- MYCPD section with record store for CPD activity completed and credit hours achieved



Step 1. The user begins by **adding a period** (click add period button in **red** under MYCPD status and calendar appears) that matches their issue and renewal dates on their license (issued by the Central Bank) to undertake insurance business.

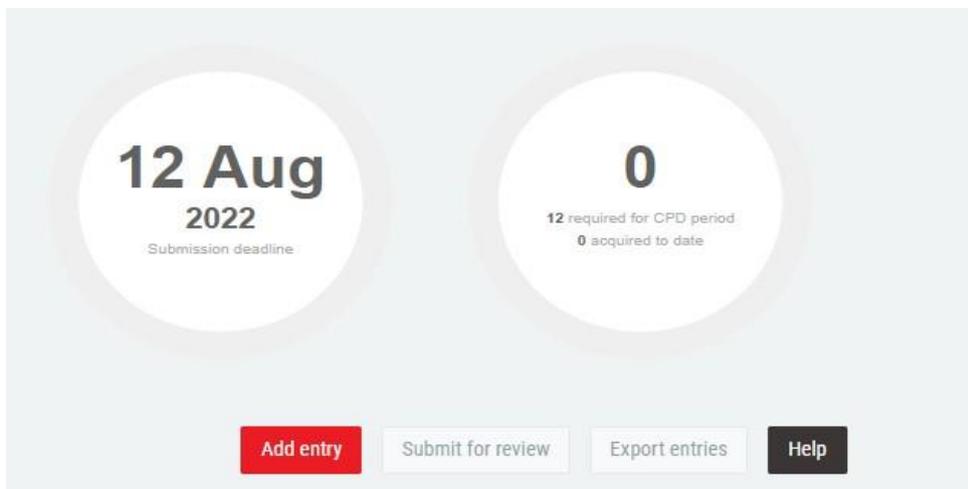
Step 2. Adjust the **target number of point/credits** in the **bar below** and **click save**. **Note:** You only create one period. See figure K-AP below.

Figure K-AP-The period created is for one year based on date of renewal of user license.

The screenshot shows a form titled "Add period". It has two calendar pickers. The "Start" calendar is for August 2021, with the 13th selected. The "End" calendar is for August 2022, with the 12th selected. Below the calendars is a text input field for "Target number of points/credits" containing the number "12". At the bottom right are "Cancel" and "Save" buttons.

Two blank graphs then appear to the right of page after period is created. The first graph shows the user's progress with relation to time. I.e. how far away is the deadline date of renewal of their license. The second graph is in relation to how many CPD credit hours have been achieved (recorded in system). See figure K-2G below.

Figure K-2G- See blanks graphs created.



Step 3. Click the **add entry** button and the form fields for recording your CPD activity opens up. Proceed to fill out the form fields using the **help document** in **black and white** in the figure above. See also figure K-AE below.

Figure K-AE-Form fields used to record user CPD activity completed.

The screenshot shows a web form for recording CPD activity. At the top left, there is a 'Home' button. Below it is a 'Guidance' section with a link to a document. The main form area contains the following fields:

- Activity Title ***: A text input field.
- Description ***: A large text area with a 'Describe this learning' label to its right.
- Activity Type ***: A dropdown menu with the label 'Select the type of activity'.
- Category ***: A dropdown menu with the label 'Select the type of category'.
- Web Link**: A text input field with the label 'This field can be used to link to a website or document related to this activity.'

Step 4. Upload evidence using the **red upload evidence button** in the **left-hand bottom corner** and click save as draft or completed (deselect tick) in the **bottom right-hand corner**. See figure K-US below.

Note: If the user completed training activity in the eLearning Academy (CPD Platform) this record will automatically be pushed to their account. The user will only need to fill out a few fields and upload evidence to complete the journal entry.

Figure K-US-Upload evidence and save buttons

The screenshot shows the bottom portion of the CPD activity form. It includes:

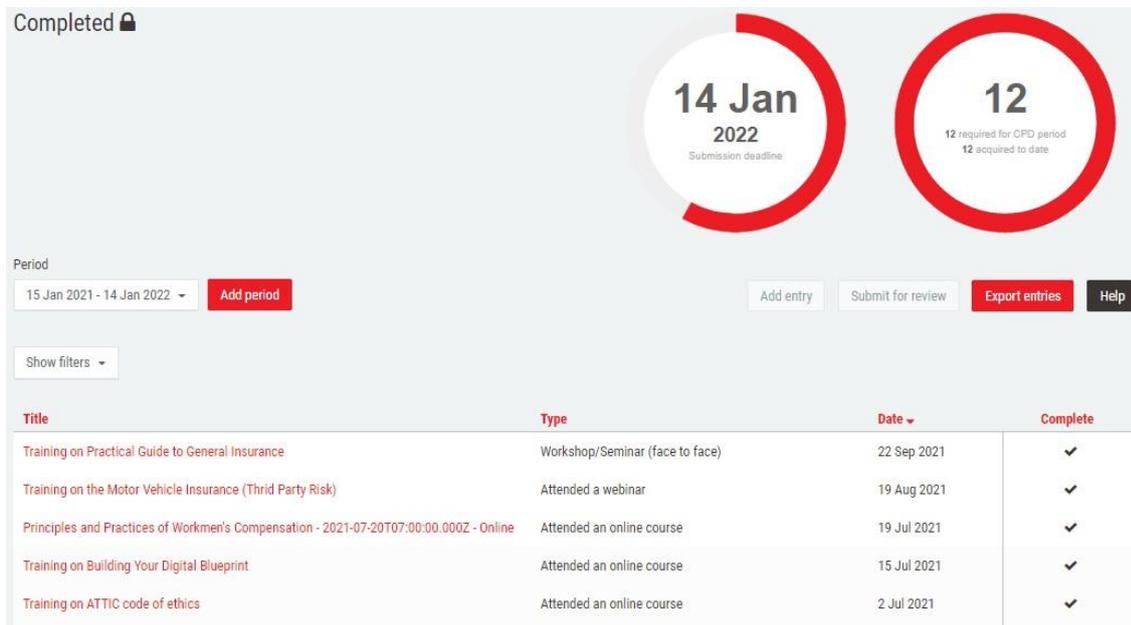
- Reflection ***: A large text area with the prompt 'Why did you do this activity and what did you learn? How will you apply this learning within your job role?' to its right.
- Evidence**: A section with an 'Upload' button. Below it, it says 'You can upload files to act as evidence for your activity. Files can be documents or images.' and 'No files'.
- Buttons**: At the bottom right, there are three buttons: a dropdown menu with a 'Draft' option, a 'Close' button, and a red 'Save' button.

When the page refreshes the user will see their **journal entry/s** (under **title, type, date** and **complete**) in the MYCPD section of their account and when 12 CPD hours (the minimum requirement under the Regulations) **or more is achieved** (as there is no cap on CPD hours achieved and recorded in the system), it is reflected on the **second graph** as **red**.

Step 4. The user can then **submit for review and verification** in the system by **clicking the submit for review button** (which will be **highlighted in red** between the graphs).

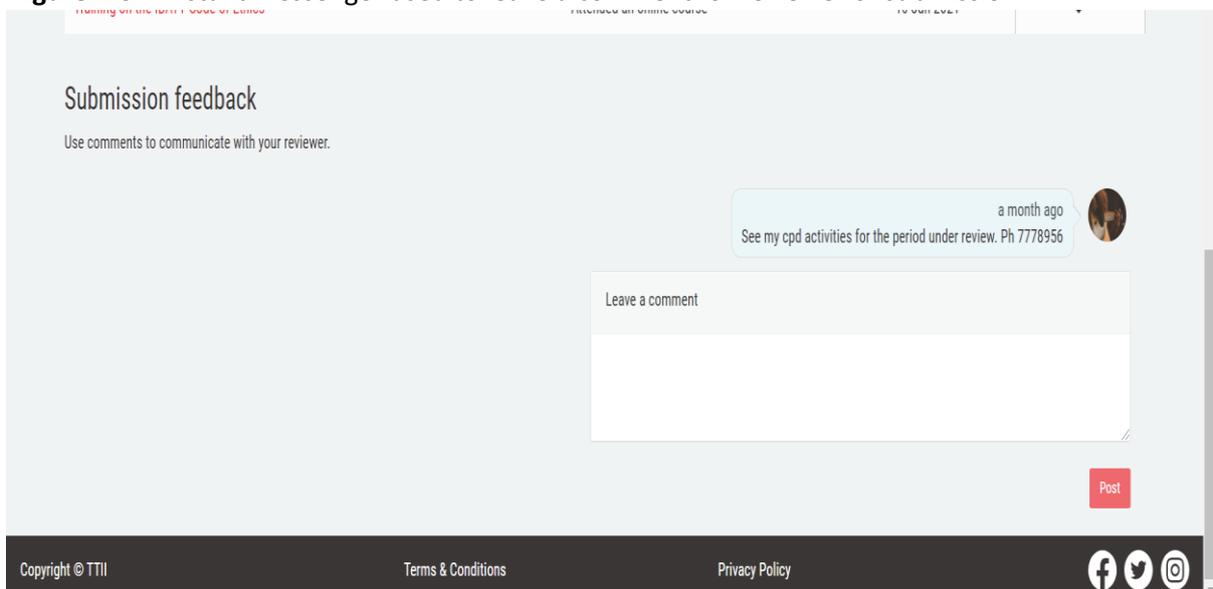
Note: If the journals are **saved as draft** it appears as **grey on graph** until changed. See example of completed CPD Journal activities in figure K-J below.

Figure K-J- Journal entries completed and submitted for verification in the system by user.



The user can also send the reviewer performing verification a message if they wish to communicate something pertaining to the submission. See figure K-SF below

Figure K-SF- Instant messenger used to leave a comment for reviewer of submission



Note: It is recommended that this be **completed 30 days before a user's actual date of renewal based on the journal period specified. Important!**

The user can also export their entries as a **PDF document** (which can be endorsed (stamped and signed) by intermediary's company and reuploaded, or provide a company letter) and/or **CSV files** which will contain all journal entries and evidence uploaded to platform.

This brings to an end the process of uploading and recording a user's CPD training activity on the platform for verification by the TTII.

5. Show what needs to be done when an Intermediary has two licenses.

An intermediary having two licenses must create one account for **General** and the other for **Life** using **unique usernames for each account** when self-registering. For example, **JonhG** for General and **JohnL** for life. The accounts can then be associated with one email address if needed. See figures L and M below.

Figure L - Example General Account

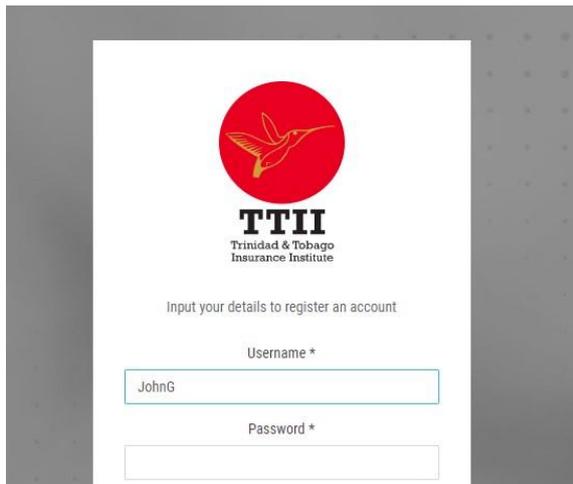
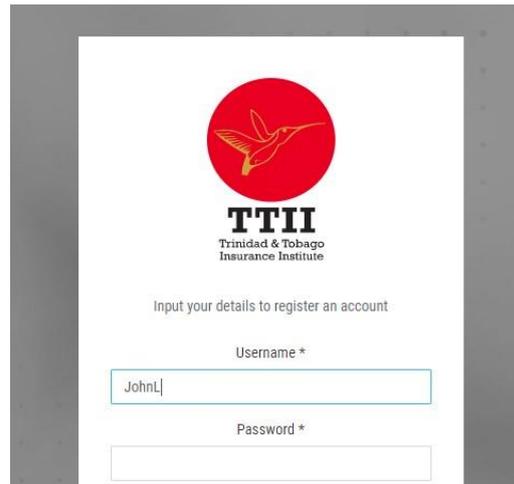


Figure M- Example Life Account



Note: See **TTII FAQs** for possible insurance Categories that can be common to both Life and General and how it can be applied to both accounts for reducing 24 CPD credit hours to 16 Credit hours in total for both accounts.

6. Questions and Answers about the features and functionality of the platform.

- a** I've created my account via self-registration. I even got an email to confirm and verify. However, when I tried to verify the account creation, I am getting invalid email or password, or account unauthorised. How do I resolve this?

Answer:

You may have taken too long to verify your account after self-registering on the platform. The link most likely expired. Try to complete creation of account no more than 24hrs after initial set up. TTII admin will reset and resend link if needed however.

- b** I did all my CPD with TTAIFA. Will Central Bank be auditing TTAIFA to verify my participation?

Answer:

The Central Bank will be auditing the TTII and Intermediaries regarding CPD. As a result, all forms of evidence submitted in the system can be audited, including TTAIFA. TTAIFA training will be verified by the TTII.

- c** How long after uploading CPD letters or proof of CPD points acquired does TTII submit or send letter of approval for your recognition on CPD points for your renewals? And if there are any problems noticed, would they (TTII) address or inform you?

Answer:

Give the TTII 7 days. However, if you do not hear from the TTII after 48 hours after submitting for verification, call to enquire about your submission status. Yes, any problem identified will be communicated to intermediary for resolution.

Note: The process of verification is continuous. TTII will be continuously contacting Intermediaries about their renewal date deadlines at least 2 months before the same, as well as, their evidence uploaded. Persons seeking guidance on verification can send an email to raphylwilliams@ttii.org.tt and copy verify@ttii.org.tt.

- d Is TTII the only body that Central Bank will recognize re CPD?

Answer:

The TTII is not the only body Central Bank will recognize regarding CPD training, as there are other recognized institutions, associations, or professional bodies like IBATT, TTAIFA, CII, ACCLA, LOMA etc. However, TTII is the only recognized body the Central Bank will recognize regarding the administration of CPD for the insurance industry at this time. This platform facilitates this. Administration also includes reviewing and approving internal and external training from companies and other professional educational bodies to qualify their training for CPD Hours (some jurisdictions also call this credits or points).

Note: See also the **Central Bank FAQs**, **TTII FAQs** and **CPD Guideline Document**.

End of questions and answers**Other support emails to consider**

Please note that the following support emails are available if needed.

- cpdhelp@ttii.org.tt -Platform issues, registration assistance and general help.
- admin@ttii.org.tt -) Registration of admin and intermediaries on platform.
- certificates@ttii.org.tt - Queries on certification
- verifycpd@ttii.org.tt -Queries on CPD verification process, verification letters, guidance on CPD evidence etc.
- ruqayahali@ttii.org.tt - Training enrolment, access links, catalogue items, cost of training etc.
- raphylwilliams@ttii.org.tt -Queries on the review of a company's internal training programme; queries on legislation regarding this CPD regime, guidance on CPD evidence etc.

End of help document