



“On the job” CPD evidence template

MEMBER NAME:

MEMBERSHIP NUMBER:

CPD YEAR:

CPD activity	Why did you choose this activity?	What did you learn from this activity?	Number of CPD hours attributed to this activity

VERIFICATION

Name:

Position:

Organisation:

Email address:

Phone number:

Verifier to summarise their involvement with the identified CPD activity:

GUIDANCE NOTES

Who is this document for?

From 1 November 2023, ICAEW members and those regulated by ICAEW for certain activities¹ are required to complete a minimum number of hours' CPD per year, a proportion of which must be verifiable.

CPD can include on the job learning which develops or maintains professional competence. You can choose to complete this document to evidence your on-the-job CPD, thus making it count towards your verifiable hours' requirement. You must be able to justify **why you did the activity** (how it was relevant to your current or future role) and **how it addressed your learning needs**. The activity also must be **verified** by an appropriate individual within the organisation (see below).

What activities could count?

Some examples of on-the-job CPD could include (but not be limited to):

- Researching the implications of a new accounting standard for your organisation / a client
- Preparing and delivery training for colleagues
- Preparing a tax return for the first time

Do I have to use this document?

No; this is a tool to enable you to include verifiable CPD for activities for which you are otherwise unable to evidence.

Guidance on “why did you choose this activity”.

Why did you carry out this activity? For example:

- Was it relevant for a piece of work you were undertaking?
- Did you need to familiarise yourself with the relevant legislation?

Guidance on “what did you learn from this activity”.

Evaluate the effectiveness of what you did. Are you satisfied that your actions have enabled you to meet your objectives, or do you need more work in this area?

Who can verify the CPD activity?

For this document to count as verifiable CPD, it must be clearly signed by an appropriate individual who can confirm that the activity took place.

This individual needs to provide their name, position within the organisation, relationship with the ICAEW member / regulated individual (e.g., line manager), and their contact details. They are also required to briefly summarise their involvement in the identified CPD activity (i.e., attended presentation delivered by the ICAEW Member).

What do you mean by an “appropriate individual”?

An appropriate individual is someone who works / has worked closely with the individual and should, unless impossible, have a more senior role within the organisation.

¹ A person who is not an ICAEW member but who is authorised or licensed by ICAEW as:

- a Responsible Individual for the signing of statutory audit reports; or
 - a Key Audit Partner for the signing of local public audit reports; or
 - an insolvency practitioner; or
 - a Probate Authorised Individual; or
 - a Licensed Practitioner under the Licensed Practice Scheme
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What should the verifier include in their summary?

The verifier should include a brief explanation of how they were involved in the activity (e.g., did they ask the member individual regulated by ICAEW to produce a report)?

Why does the verifier need to provide their contact information?

If the member / individual regulated by ICAEW is selected for monitoring, ICAEW reserves the right to contact the individual to verify that the activity took place.

What do I need to do with this document?

The completed form should be retained for a period of 3 years (from the end of the relevant CPD year). If you are selected as part of CPD monitoring, you will be required to provide this form as evidence.
