# An Overview of the training file
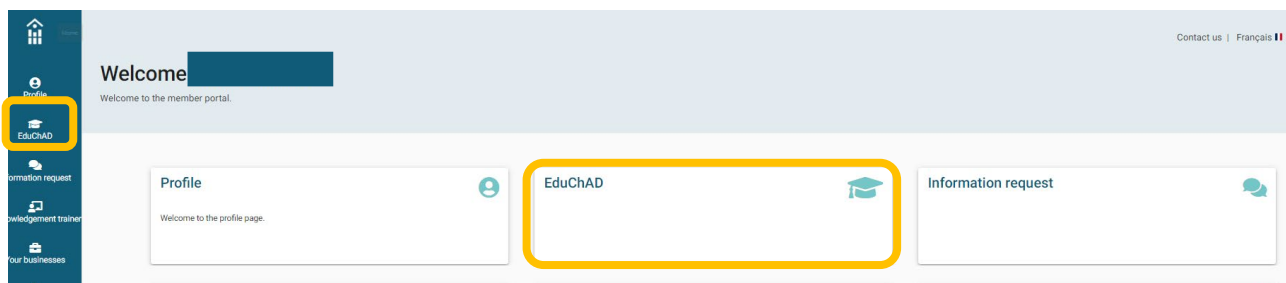
▶▶ **Background information: ÉduChAD is the ChAD's learning management system. It allows damage insurance brokers and agents, as well as claims adjusters, to manage their professional development plan. This user-friendly platform allows you to:**

1. **Have a clear and complete view of your training file;**
2. **Track your progress in fulfilling your professional development obligations (hours of training, completion of the mandatory course);**
3. **Plan which skills you want to improve by taking relevant, interesting training.**

**Here is what your training file contains and how to access this information.**
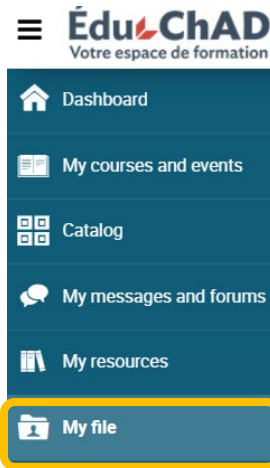
**PROCEDURE**

1. **Log in to the ChAD Portal at portail.chad.ca (if necessary, <u>follow the procedure</u>) and switch to ÉduChAD by clicking on the "ÉduChAD" button.**



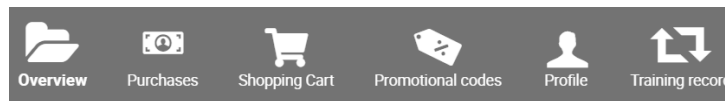2. **Go to the left-hand menu and click on "My file."**

ÉduⱢChAD
Votre espace de formation

Dashboard

My courses and events

Catalog

My messages and forums

My resources

My file

**3.** **Your file has six tabs (Overview | Purchases | Shopping cart | Promotional codes | Profile | Training file).**

| Overview | Purchases | Shopping Cart | Promotional codes | Profile | Training record |

**4.** **The "Overview" allows you to track your progress in fulfilling your professional development obligations: hours completed versus hours required, your progress in completing the mandatory course, and how many hours you must complete in the Compliance category. You can also see the training you completed during previous periods.**

Tip #1: click on "Manage my folder" to view your file in even greater detail.

My training record ›

PERIOD FROM:
**JANUARY 1, 2022 TO MARCH 31, 2024**
Manage my folder

Status: Conforme

Votre dossier indique que vous avez complété vos exigences en UFC pour la période 2022-2024!

Hours completed / Hours required    25h00 / 20h00

Mandatory ChAD course    2h00 / 2h00

Minimum number of accredited hours to complete in training categories    5h15 / 3h00

Profile

Organisation:
Function within the organisation:
Email:

Certificates

Attestation de formation
Accident de parcours : Pleins feux sur la Chambre de...

Registrations

76 registrations displayed

Search

Exports and reports

ÉduⱢChAD
Votre espace de formation
Tutorial: An Overview of the training file
September 2023
2/4

On the right, you can view the attestations for training you successfully completed.

Scroll down to see the status of the training you are currently registered for, as well as your progress towards completing the current period's mandatory course.

*Tip #2: click on "Exports and reports" to view a status report on your professional development obligations, as well as the total number of hours (or PDUs) you have earned, and the list of courses completed.

**Exports and reports** ✕

What do you wish to generate?

● A training report
Generates a report with all the training courses where you have been registered

Display on screen

Generate a PDF

✖ Cancel

Édu-ChAD **TRAINING REVIEW**
Votre espace de formation

Google Translat

**Training report -** ▬▬▬▬▬ In date of December 20, 2023

| Provider | Recognition number | Training title | Status | Completion Date | Category |
|---|---|---|---|---|---|
| ChAD | AF1013 | Fraude en assurance, revue de la jurisprudence (AF1013) | Completed with success | 04-23-2021 | Law |
| ChAD | AF1020 | Renseignements personnels lors d'un sinistre: comprendre, utiliser et expliquer le formulaire de consentement | Completed with success | 04-16-2021 | Compliance |

5. **The "Purchases" tab lists all your purchases on the ÉduChAD platform, be it a training activity, a training programme or a professional title. Click on the invoice number to the left to see the details of the transaction.**

My file

↩ Back | Overview | Purchases | Shopping Cart | Promotional codes | Profile | Training record

My purchases

| | | | | | |
|---|---|---|---|---|---|
| X152007 | ▣ | Accident de parcours. Pleins feux sur la Chambre de l'assurance de dommages | 17/08/2023 12 h 19 | 0.00$ CAD Paiement par facturation | chad |
| X152004 | ▣ | Accident de parcours. Pleins feux sur la Chambre de l'assurance de dommages | 17/08/2023 11 h 56 | 0.00$ CAD Paiement par facturation | chad |

6. **The "Shopping cart" tab shows uncompleted purchases. To register for a training activity, you must complete the transaction and pay the invoice.**



7. **The "Promotional codes" tab will show any promotional codes, where applicable. A code may not necessarily appear; this means that there is no promotional code at the moment.**

8. **The "Profile" tab contains a great deal of important personal information regarding your professional practice and oversight. Please note that most of the information is sent by the Autorité des marchés financiers. If any of this information is incorrect—for instance, your mailing address or phone number—please contact the Authority to correct it.**



9. **The "Training file" tab allows you to see the status of your completed PDUs, make an application to self-declare PDUs, or submit an application for an exemption. To find out how to do so, please refer to the following procedures:**
   a. **PDU self-declaration**
   b. **Exemptions**