

USER GUIDE


 Compulsory Professional Development
Professional Development Department

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1. GENERAL INFORMATION

1.1 Introduction

The mission of the Chambre de l'assurance de dommages (ChAD) is to protect the public in matters related to damage insurance and claims adjustment. One of its responsibilities is to oversee the compulsory professional development of over 15,000 certified professionals by enforcing *the ChAD's Regulation respecting compulsory professional development* (Regulation).

This User Guide (the Guide) is intended primarily for certified members of the ChAD, damage insurance company managers, training providers and trainers and is designed to supplement the Regulation. It explains how certified members' files are managed with respect to compulsory professional development and also clarifies the ChAD's expectations of its certified members, training providers and trainers.

1.2 Definitions

Training provider: an independent trainer, training organization, educational institution or damage insurance company that gives at least one ChAD-certified training course.

Training file: the certified member's file containing all training courses taken and the member's professional development obligations.

Summative assessment: designed to measure what the member learned by taking the training course, as measured by pre-established objectives.

Professional development: Professional development is the ongoing process of learning that extends beyond pre-service training. It includes any structured activity focused on acquiring, deepening and updating knowledge and developing the skills required to maintain and improve one's ability as a professional to fulfill all requirements related to protecting the public.

Synchronous training: training offered in real time. The learner can interact with the trainer and other participants.

Asynchronous training: training offered off-line that can be taken at any time. The learner does not have the opportunity to interact with a trainer or other participants during the course.

Certified member: holder of a certificate issued by the Autorité des marchés financiers (AMF) as a damage insurance agent or broker, or as a claims adjuster.

Reference period: any 24-month period beginning on April 1 of an even-numbered year.

Certification of training activities: process by which the ChAD analyzes and approves training activities and the trainers who facilitate them, according to predetermined, qualitative assessment criteria.

PDU: Professional Development Unit. One PDU represents one hour of certified training.

2. PDU MANAGEMENT

2.1 Certified members' obligations

Under the Regulation respecting the compulsory professional development of the ChAD, all certified members are required to earn professional development units (PDUs). A certified member who fails to meet this requirement will have their certificate of practice suspended or not renewed by the Authority and will no longer be able to practice in the field of damage insurance.

PDUs are recognized in the following categories: Administration, Insurance Techniques, Law, Compliance, Professional Development.

To meet their professional development obligations, the ChAD's certified members must earn 20 PDUs per two-year reference period, including:

- the mandatory two-hour Compliance course;
- at least one additional PDU in Compliance;
- no more than five PDUs in Professional Development.

2.2 Residents of another province

The ChAD has reached an agreement with the other provinces' regulatory bodies to mutually recognize compulsory professional development requirements.

This reciprocity agreement applies to certified members who hold certificates in two or more provinces (dual certification). Under this agreement, a certified member **residing outside Quebec** who holds **certification from another province**, such as the Registered Insurance Brokers of Ontario (RIBO), may be exempt from Quebec's professional development requirements, provided they **comply with the requirements of their province of residence**.

However, if a certified member resides in and holds a certificate from one of the Atlantic provinces in addition to their Quebec certificate, they must meet the requirements of their Quebec certificate by completing the required 20 professional development units (PDUs), since these provinces do not require compulsory professional development.

How should I proceed?

Certified members from the other provinces concerned (Alberta, British Columbia, Manitoba, Saskatchewan and Ontario) must send us their training certificates showing that they have fulfilled the requirements in force in their province of residence. Once we have received the supporting documents, we will confirm the applicable exemption.

Please familiarize yourself with the documents you need to enclose with your PDU exemption application for the Quebec certificate.

It is important to note that Quebec's reference period lasts two years and currently runs from April 1 to March 31 of even-numbered years. (e.g.: April 1, 2024, to March 31, 2026).

Steps to follow:

Attach a copy of the certificate currently in force in the certified member's province of residence, corresponding to the Quebec reference period.

1. Also enclose a copy of all supporting documents showing which courses have been completed.
2. Complete your application once per two-year reference period directly in your training file on ÉduChAD. [This tutorial on requesting an exemption](#) explains how to do so.

2.3 Earning PDUs

2.3.1 ChAD-certified training courses

To earn PDUs, a certified member can take training that is ChAD-certified or offered directly by the ChAD. The training provider will enter the PDUs earned into the member's file within 30 days of completion.

Certified members can consult the list of certified training courses offered by the ChAD on ÉduChAD under the "Catalogue" tab.

2.3.2 Training activities that are not certified by the ChAD

A certified member who has attended a training activity that is not ChAD-certified can apply to receive PDUs by submitting a [self-declaration](#). To do so, members must log in to their account on ÉduChAD, go to their training file, select "New self-declaration" and select "I have taken training not recognized by the ChAD". A description of the training, the trainer's biography and proof of attendance or having passed the training must be uploaded with the application.

A fee of \$25 applies. Training must meet the criteria established by the ChAD for the activity to be certified (see 3.1).

2.3.3 College, university or Insurance Institute of Canada or Quebec courses

PDUs may be awarded free of charge and added to a certified member's file for having completed a college or university course recognized by the Ministère de l'Éducation et de l'Enseignement supérieur, or a program given by the Insurance Institute of Quebec or the Insurance Institute of Canada, provided it corresponds to one of the recognized training categories. The course must be worth college or university credits and lead to a diploma.

If the training was given by a CEGEP's or university's professional development department, the member must make a self-declaration and pay the aforementioned fees.

The certified member must complete the online form in their training file and provide the ChAD with the transcript proving they have successfully completed the course.

2.3.4 The ChAD's Discipline Committee

Like trainers, Discipline Committee chairs share their knowledge of ethics and disciplinary law with the certified members who sit alongside them on the Discipline Committee.

A certified member who sits on the Discipline Committee may be granted two PDUs in the Compliance category per disciplinary hearing. To receive PDUs, the certified member must complete a self-declaration by selecting the "Discipline Committee" category and uploading the proof of attendance provided by the ChAD's clerk. A maximum of four PDUs per reference period may be awarded.

2.3.5 Training attended more than once

A certified member can earn PDUs for the same training course only once per reference period.

Furthermore, a certified member can only earn PDUs for the same training course a maximum of twice in the course of their career. To find out which training courses a certified professional has already taken twice or more, they should log in to their EduChAD account, click on the "My file" tab and then select "Overview". If the professional has already obtained PDUs twice for the same training, a warning will appear in the overview, with the words "Completed twice" under the training.

2.3.6 PDUs for trainers

The first time a trainer gives a training course, they earn double the PDUs recognized for the training, during the reference period in question. If they give it again during a subsequent reference period, they obtain the number of PDUs recognized for the training. Trainers who give the same training three times or more will not earn any further PDUs.

Example: A trainer gives training worth three PDUs for the very first time: the trainer will earn six PDUs. In the next reference period, if the trainer continues to give this training, they will earn three PDUs. If they continue to give it during subsequent periods, they will not earn any PDUs.

2.3.7 Carryover of PDUs from one period to another

If a certified member earns more PDUs than required for the current reference period, a maximum of five PDUs are automatically transferred to the following period. If the certified member has accumulated more than five extra PDUs, priority for transfer to the following period is given to PDUs in the Professional Development category, followed by the Administration, Insurance Techniques and Law categories. Note that excess PDUs earned in the Compliance category will be transferred to the Law category.

2.3.8 Online training file

Certified members can consult their training file online on the ÉduChAD site at portail.chad.ca in order to:

- Find out how many PDUs they still have to earn, and in which categories.
- Confirm that the training courses they have completed appear in their file.
- Identify training courses they have already taken twice.
- Consent to their employer consulting their training file.

2.4 Exemption from professional development

2.4.1 Exemption for newly certified members

Newly certified members are exempted from having to earn PDUs for a period of twelve months following the date on which they obtain their certificate from the Authority. However, newly certified members must complete the mandatory course in the current reference period.

If a certified member adds a sector class to their certificate or changes sectors, they will not be exempted again.

Example: A certified member obtains his certificate in October 2024. During the first six months of the reference period, he did not hold a certificate. The following twelve months are not taken into account when calculating the number of PDUs to be earned (one-year exemption). This leaves six months of the reference period (a quarter of the reference period). The certified member will therefore have to earn a quarter of the 20 PDUs before March 31, 2026, in other words, five PDUs (including the mandatory course).

Reference period 2024-2026

(24 months)

| April 1, 2024 | October 1, 2024 | October 1, 2025 | March 31, 2026 |
|----------------|---------------------------------------|-------------------------------|----------------|
| No certificate | Exemption for newly certified members | Period used to calculate PDUs | |
| (6 months) | (12 months) | (6 months) | |

2.4.2 Exemption from professional development on medical or parental grounds

A certified member who is absent from work for more than four consecutive weeks for reasons of force majeure (e.g. medical reasons or parental leave) will be granted an exemption from compulsory professional development.

The number of PDUs to be completed is prorated according to the number of full months worked during the reference period (including the mandatory course).

If a certified member wishes to benefit from an exemption, they must complete the exemption request form in their training file and provide supporting documents (medical certificates or a letter from the insurer paying disability benefits). For maternity or parental leave, the certified member must provide the QPIP document confirming the period of absence. A maximum twelve-month exemption may be granted for

parental leave unless the extension is justified on health grounds. A medical note is then required to grant an additional exemption.

Example: a certified member is off work for four months. On receipt of the required documents, the ChAD will reduce the number of PDUs to be earned in proportion to the number of months worked, in other words, 20 months.

Example: Towards the end of the reference period, a certified member takes an indefinite leave of absence due to health concerns. The ChAD will exempt her from the number of PDUs for the current period, since this corresponds to the number of months she was absent during that period. If she still had PDUs to complete, she would have until the end of the period, in other words, March 31 of an even-numbered year, to earn them. No further extension can be granted.

There is no exemption from compulsory professional development for sabbaticals, gradual return to work, job loss or retirement.

2.4.3 Natural caregivers

In cases where a certified member is absent from work for several months because they must act as a caregiver (for example, to care for a seriously ill child, a spouse or a parent requiring end of life care), an exemption may be granted. In this case, the certified member must provide a document explaining the situation of the person being cared for and submit their request through their training file.

2.4.4 Exemption and PDU categories

A certified member who has been granted an exemption must still earn three PDUs in Compliance, including the compulsory course, unless they are totally exempt from PDUs for the current period.

A certified member may never earn more than five PDUs per reference period in Professional Development.

3. CERTIFICATION OF PROFESSIONAL DEVELOPMENT ACTIVITIES

3.1 Activity certification criteria

3.1.1 Activity certification principles

In order to be certified:

- Training must enable you to acquire, update or deepen skills or knowledge related to the practice of damage insurance professionals.
- The skills or knowledge the training focuses on must have a concrete impact on professionals' practice. In other words, training must improve the way professionals perform their tasks.

- The link between the skills or knowledge and representatives' practice must be direct and obvious.
- Training must be structured to facilitate the achievement of learning objectives.
- Training content must be transferable, i.e. the skills and knowledge acquired must be applicable to other damage insurance workplaces.
- In addition, each trainer authorized to offer the activity must meet the criteria set out in section 3.2.1 of this Guide.

Examples of activities eligible for certification:

- a classroom course
- a lecture
- training activities offered at a convention, symposium or seminar
- synchronous or asynchronous distance learning (see 3.1.3 and 3.1.4)

Examples of activities that cannot be certified:

- motivational activities (sales or other)
- cocktail parties
- listening to or observing colleagues
- meetings, study or work groups
- reading or viewing (without an included learning activity)
- authoring a professional article
- coaching or mentoring activities
- training over the phone
- panels (informal meeting of specialists to discuss a problem)
- information sessions (without skills development or any pedagogical structure)
- asynchronous training without a learning assessment questionnaire
- training given by a trainer who does not meet the criteria

3.1.2 Subjects eligible for certification

In accordance with Section 4 of the Regulation, to be certified, training must cover one of the following subjects:

Administration

To be recognized in the Administration category, a training activity must be aimed at executives, managers or certified members of the management team. In addition, the objective of the training must be to improve the firm's management.

Insurance techniques

This category includes training in personal or commercial lines insurance, risk management, claims adjustment, building mechanics, investigation techniques and loss prevention.

To be recognized in the Insurance Techniques category, a training activity must enable the professional to advise consumers according to their needs, apply risk management concepts or settle claims.

Law

To be recognized in the Law category, a training activity must deal with legal issues that apply to the work of agents, brokers and claims adjusters.

Compliance

This category includes ethics and the disciplinary procedure in damage insurance, as well as the laws and regulations governing both the distribution of financial products and services and the protection of personal information.

Professional development

To be recognized in the Professional Development category, a training activity must enable learners to perform their daily tasks more effectively. This includes training that addresses developing the advisory role (e.g. customer service) and operational efficiency (e.g. decision-making, time management, computer systems specific to damage insurance, insurance in one's second language).

Training on the following topics, in particular, is not recognized:

- software (Word, Excel, Outlook, etc.)
- a company's internal procedures, underwriting standards or code of conduct
- stress management
- communication
- how to behave at meetings or in a team, as well as etiquette
- writing
- schedule management
- social networks
- non-verbal language (except in the context of claims adjustment investigations)
- psychology
- personal growth
- an influencer's opinions
- product or company promotion
- courses lasting less than 15 minutes

This list is not exhaustive.

3.1.3 Asynchronous online training

Asynchronous online training can be taken at any time; the learner does not have the opportunity to interact with a trainer or other participants during the training.

Active learning activities

In order to be of educational value and promote knowledge transfer, online training must include active learning activities, taking place throughout the course.

Active learning activities include :

- case studies
 - open questions
 - guided questions
 - drag-and-drop questions
 - matching games
- quizzes (multiple choice, true or false, find the odd one out, etc.)

Training must include one learning activity for every 15 minutes of class time. Thus, if the training lasts 45 minutes, it must include three activities.

Content expert

A qualified resource person must be available to answer participants' questions. This person must have at least one year's experience in the subject being taught, and their curriculum vitae must be included in the application for certification.

Summative evaluation

All online training courses must include a summative evaluation (a questionnaire designed to determine whether the learning objectives have been met). It must respect the following criteria:

- The questions must be sufficiently difficult to be able to determine that the learner has completed the entire training.
- Require a minimum passing mark of 60%.
- Include a minimum of five questions for training lasting one hour or less. When training lasts more than one hour, the minimum number of questions required is as follows:
 - 1 to 2 hours: at least 10 questions
 - 2 to 3 hours: at least 15 questions
 - 3 to 4 hours: at least 20

Learning activities included in the training can be used for the summative evaluation, provided they take place after the subject they are intended to assess is covered and are of a sufficiently high level of difficulty.

The evaluation must be submitted to the ChAD at the same time as the initial application for training certification or renewal.

3.1.4 Synchronous online training

When training is given synchronously, participants must be able to ask the trainer questions either during or after the training.

During the training, the trainer must verify several times that each participant is paying attention. This can be done, for example, by making eye contact with the participants, regularly asking them questions verbally

or in writing, or asking them to answer multiple-choice questions. The method used for these verifications must take into consideration the number of participants in the course, in order to ensure it is effective.

If the trainer does not wish to verify learner participation, a summative evaluation may be done; it must require a passing mark of at least 60% for the PDUs to be granted.

3.1.5 Calculating PDUs

The ChAD certifies activities that last at least 15 minutes

PDUs are rounded up using the following scale:

- Less than 15 minutes = none
- 15 to 29 minutes = 0.25
- From 30 to 44 minutes = 0.50
- 45 to 59 minutes = 0.75
- 60 to 74 minutes = 1

Mealtimes cannot be included in the length of the activity.

3.2 Application for certification of an activity

3.2.1 Applying for certification of an activity

The application for certification of an activity must be submitted to the ChAD at least 30 days prior to holding the training activity.

When applying for certification, the trainer or training provider must :

- Complete the application for certification of a training activity on the ChAD portal, in the "Managing Business Accounts" section.
- Complete all the requested sections in enough detail to enable the ChAD to identify the training objectives and content, and to determine the eligibility of the application for certification, as well as the applicable PDU category(ies)
The time allocated to each content element must be specified. If necessary, the ChAD reserves the right to request additional information and/or training documents (e.g. PowerPoint presentation) from the training provider.
- Attach the summative evaluation for asynchronous online training.
- List the trainers who will lead the training activity. If the trainers have not already been certified by the ChAD, please refer to 3.2.3.

The person applying for the certification or renewal of certification of an activity must respond to the ChAD's request for additional information within 10 working days, failing which the ChAD reserves the right to refuse the application for certification. A new application must then be submitted.

3.2.2 Fees payable for certification of an activity

An activity's certification is valid for one day or for two years.

Application fees for two-year certification:

\$60 file-analysis fee. (The file-analysis fee is non-refundable, even if the activity is not certified).

\$25 per quarter PDU granted (\$25 for 0.25 PDU, \$50 for 0.50 PDU, \$75 for 0.75 PDU, \$100 for 1 PDU)

\$25 per trainer assigned to the course.

Application fees for one-day certification:

\$60 file-analysis fee

\$25 per 0.25 PDU granted

3.2.3 Applying for trainer certification

An application for trainer certification must be submitted to the ChAD and be approved before the trainer can be added to an application for training certification. There are three types of trainer certification:

- Trainer
- Speaker
- Content expert

To be certified as a trainer, the individual must meet the following criteria:

- at least one year's experience in the subject being taught
- **AND** one of the following two criteria:
 - have completed 21 hours of training in knowledge transmission methods (training for trainers) or
 - have completed a minimum of 100 hours as a group trainer.

To be certified as a speaker or content expert, the person must meet the following criteria:

- at least one year's experience in the subject taught

A speaker giving an asynchronous course cannot be added to a two-year application for certification. If the applicant has been previously sanctioned by their profession's Discipline Committee, they must declare this, and an analysis will then be carried out.

A \$60 analysis fee is charged for an application for trainer recognition. This fee is non-refundable in the event of refusal or cancellation of the application.

3.3 Responsibilities of training providers and trainers

3.3.1 Period of validity for activity certification and renewal

For two-year certifications, 60 days before the expiry date, a renewal notice is e-mailed to the provider. An application for renewal of the certification must then be submitted to the ChAD. Only the trainers can be changed at the time of the application. If you wish to change any other information on the training, a new application must be submitted.

A training activity may be renewed a maximum of twice in six years. After this time, a new application must be submitted to allow a new analysis of the content. **A notification will not be sent** to the course provider once the course has reached two renewal cycles.

3.3.2 The ChAD's PDU logo

Once the application for certification is accepted, the ChAD sends an e-mail confirmation to the person responsible for the application. The logo and certificate will be displayed in the activity's tab, in the provider's account on your portal.

Any publication or representation of a certified activity must display the ChAD's PDU logo, clearly indicating the number of PDUs. The training provider must indicate the category, along with the certification number.



Administration

It is strictly forbidden to publicize the fact that a course grants PDUs, or to use the PDU logo, before the course in question has been certified by the ChAD.

It is also strictly forbidden to use the ChAD corporate logo without prior written authorization.

3.3.3 Making changes to an activity

A new application for certification must be submitted for a certified activity that has undergone a change to one or more of the following elements:

- topic of the training
- training content
- course length
- type of training (e.g. asynchronous online vs. classroom)

3.3.4 Adding or replacing a trainer

A provider wishing to add a trainer to a certified activity must immediately notify the ChAD by submitting a request to add a trainer and demonstrate that the new trainer meets the conditions set out in section 3.2.1.

Trainers who have never been previously certified must first ensure that they have access to the ChAD Portal and then submit their application for trainer certification.

3.3.5 Attendance list

The training manager must enter the attendance list under the "session" tab on the ÉduChAD site **no later than 30 days after the activity has taken place** and upload it into the "participants" section of the session.

The provider must keep a copy of the documents for a period of 24 months. Lists can be kept in paper format or scanned, as long as the document is legible.

Use this [Excel template](#) to create your attendance list.

The attendance list must include

- ⊖ their certificate number issued by the Authority
- ⊖ the date training was completed

Completion status (pass or fail)

When the training activity is classroom-based, the participants must sign the attendance list at the end of the training. Even if this file is not uploaded, it must be kept for a period of 24 months after the training activity has taken place.

If the training activity is remote and synchronous, the trainer must certify participation and/or success and write "*remote*" in place of the participant's signature.

If the training is remote and asynchronous, the person in charge must certify participation and/or success and write "passed" in the Excel file.

3.3.6 Training Attestation

The training provider must be able to provide an attestation of training to any participant who requests one. It must include:

- the name of the organization that provided the training
- the participant's name and certificate number
- the title of the training and its ChAD certification number
- the date of the activity
- the number of PDUs and category
- the trainer's name

Only the logo of the training organization may appear on the attestation. A [customizable model](#) (in French only) is available on chad.ca.

3.3.7 Training provider's commitment

When applying for recognition or renewal, training organizations agree to comply with the following obligations:

- comply with the *Regulation respecting compulsory professional development of the Chambre de l'assurance de dommages*;
- ensure that the trainer(s) have the skills required to deliver the training;
- ensure that the content delivered complies with the rules governing damage insurance;
- ensure that training corresponds to the summary in the trainer's guide (course outline) submitted with the application for certification;
- not use training to promote a product;
- not engage in false, misleading or deceptive advertising;
- indicate the number of PDUs, the category(ies) and the certification number when advertising certified training courses, and display the PDU logo;
- at the end of classroom training sessions, have participants who have attended the entire course sign the attendance sheet;
- for online training courses, have the participants complete a summative evaluation that requires a passing grade of 60% or more;
- ensure that the trainer verifies the virtual presence of participants during synchronous online training;
- certify attendance on the ÉduChAD site within 30 days of the session and upload the attendance list or completion report.

3.3.8 Changing the training-provider account manager: impacts and responsibilities to consider

You are the training-provider account manager, but you're retiring or changing employers. Will someone else be taking over your position? Here's how to ensure a smooth handover of responsibilities for the account:

1. Contact us at formation@chad.qc.ca as soon as possible to let us know about this change. The Professional Development Department needs to know the name of the person now authorized to manage the training provider account in order to create an account for them and make changes in the system, if necessary.
2. It is also your responsibility to indicate whether this person should be designated as the contact-person for the organization's ChAD-certified training courses. This change of contact-person, if applicable, is important and has an impact on your organization's operations. The contact-person receives automatic notifications concerning, in particular, the renewal of training certification.
3. Don't forget to train the new manager to closely monitor training-certification deadlines. For example, renewal notices are sent twice by e-mail: first at 60 days, then at 30 days before renewal. If the account manager does not renew the certification before it expires, he or she will have to submit a new application for certification and pay the associated fees.

To ensure fairness among all training providers registered with the ChAD, please note that we will not be able to systematically reactivate the function to renew training certification if we have not received the name of the new training-provider account manager prior to the renewal deadline.

3.3.9 Training audits

To ensure the quality of training content, trainer skills, consistency with professional development needs and compliance with criteria, the ChAD audits the training courses it certifies.

Each time a participant receives a certificate attesting to their attendance in a certified training course, they receive an e-mail confirming that the course has been added to their file, and an invitation to complete an evaluation questionnaire. When the answers to the questionnaire result in the ChAD identifying certain shortcomings, it notifies the training provider and invites them to take the necessary corrective action as soon as possible.

The ChAD also reserves the right to audit a training course to assess its quality and compliance with certification standards. When the ChAD contacts a training provider to take a course for auditing purposes, the training provider must cooperate.

Following an audit, the ChAD may withdraw a training course's certification:

- if it finds that the training does not meet the certification criteria;
- if the deficiencies observed cannot be corrected in the short term;
- if the provider has provided incorrect information when applying for certification.

3.3.10 Non-compliance with the Regulation or the User Guide

Training providers and trainers are required to comply with the Regulation and this User Guide on compulsory professional development.

Anyone may file a complaint with the ChAD against a training provider or trainer for conduct in breach of the Regulation or the User Guide. The complaint must be in writing and must briefly set out the grounds for the complaint. The ChAD may reject any complaint deemed unfounded.

Following a complaint or on its own initiative, the ChAD may investigate the conduct of a training provider or trainer who may be in breach of the Regulation or the User Guide.

The ChAD informs the training supplier concerned of the reasons for the complaint and refers them to the provisions of the Regulation or the User Guide that they or their trainer may have breached. The ChAD also notifies the training provider of the sanctions to which they may be subject. The ChAD informs the provider that they may, within 10 days, submit their observations and version of the facts in writing and, if applicable, produce documents in support of their version. The ChAD may also request the version of the trainer concerned, or of any other person, as the case may be.

If the ChAD concludes that the training provider or trainer has behaved in a manner contrary to the Regulation or the User Guide, it may, in the case of a minor breach and a first offence, ask the provider to correct the offending behaviour immediately or put in place the necessary measures to prevent such a situation from recurring.

