



Continuing Professional Development Scheme for Money Advice Service funded advisers

Scheme guidance 2018-19

This scheme is adapted from the CPD scheme operated by the Institute of Money Advisers for its members who have obtained the Certificate in Money Advice Practice

Approved on: 20/07/2018

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1. About the CPD Scheme for MAS funded advisers

Following feedback from the MAS commissioning consultation workshops in 2017, findings from Peer Review and recommendations from the Peter Wyman review, it is clear that the debt advice sector would benefit from more help, both financially and administratively, to invest more time in CPD activity that will help to improve quality of advice within the sector.

Therefore, the Money Advice Service (MAS) is working with the Institute of Money Advisers (IMA) and the Money Advice Trust (MAT) to implement a new process to enhance the quality of the debt advice it funds. This is in line with MAS' recently published Strategic Approach to Debt Commissioning, which puts the quality of advice and client outcomes at the heart of our approach.

As per the new grant agreements, organisations will need to evidence that their MAS-funded debt advisers undertake 16 hours/equivalent of Continuous Professional Development (CPD). CPD activity required during the 2018/19 grant agreements should mainly focus on debt advice at a sufficiently technical level to develop an adviser's knowledge and practice.

It should be noted that there is no requirement for **trainees, volunteers and non - advising supervisors** (a supervisor who does not give advice) to complete and submit a record of CPD activity. Such staff which support the advice giving process within the service will be maintaining the relevant knowledge required to undertake their roles in assuring a high quality service for clients and will be working to, and in accordance with the organisations' Quality Standard and/or membership requirements.

1.1 About this guidance

This guidance sets out the requirements of the CPD Scheme for MAS funded advisers, including which activities count, how to submit a record of your activities and how many points each type of activity is worth.

The guidance will be updated to take account of feedback during the first year of scheme implementation. To give feedback, please email us at feedback@i-m-a.org.uk using the subject 'CPD Scheme for MAS funded advisers'.

1.2 Frequently asked questions

A list of frequently asked questions will be developed as we receive queries relating to the new scheme. These FAQs will aim to answer recurring questions and, whilst not forming part of the scheme requirements, will be designed to help you interpret them.

1.3 Data sharing

All MAS funded advisers should have received communication via their Lead Organisation from MAS regarding the requirement to complete 16 hours of technical CPD per annum from 1st April 2018.

All advisers in MAS funded positions are required to submit CPD records on a quarterly basis. The Trust will provide IMA and non-IMA members with an online tool within the

Wiseradviser site in order to record their CPD activity. In quarter one, CPD activity data will be recorded manually by organisations using the template provided by MAS. The completed template should then be emailed to the Trust email address, contactus@moneyadvicetrust.org. The CPD activity data will be collated by the Trust and provided to the IMA for review.

From quarter two, the Trust will provide a report detailing all IMA and non-IMA member adviser records to the IMA for review and sign off. The reporting will not contain any sensitive data. The sharing of the CPD data between the Trust and the IMA will provide certainty that advisers are meeting the ongoing technical development requirements detailed in agreements, and ensure the quality and consistency in the services provided to clients.

2. Basic requirements of the scheme

The CPD Scheme year runs from 1 April 2018 to 15 February 2019.

To meet the requirements you need to satisfy the IMA and MAT that you have continued to develop your experience and expertise in debt advice over the year. To do this you need to:

- accumulate at least 16 CPD points worth of technical CPD activities,
- undertake activities in at least 3 of the 4 activity categories,
- complete at least one training activity,
- submit a completed CPD record by the end of each quarter (the following deadlines will apply):
 - 27th July 2018*
 - 5th October 2018
 - 11th January 2019
 - 15th February 2019

* for the first quarter's submission only, we recommend a nominated person in your organisation complete the excel spreadsheet '**CPD activity log July 2018**' for all advisers required to comply with the CPD scheme. This can be found [here](#)

You should list **all CPD activity** that an adviser has completed between 1st April and 27th July, even if you do not know whether it will count towards the scheme. The IMA will audit all CPD records and contact you to advise you which activities have been allowed.

To assist, a list of eligible IMA learning is attached at [Appendix 2](#) – Eligible IMA learning.

Eligible Wiseradviser learning is listed at [Appendix 3](#) – Eligible Wiseradviser learning.

There are some important points to note about the requirements of the scheme:

- A quarterly record must be submitted for **all MAS funded debt advisers**, even if they have not yet fully accrued all 16 CPD points. This will enable us to provide feedback about CPD records submitted and help you to plan where further points are needed in any category.
- The 16 point requirement applies whether you are working full or part time on a paid basis.
- Points cannot be carried over from year to year.
- There is a limit of 2 points each year from reading journals and industry publications.
- Activities must be in addition to your normal work duties.
- If you undertake refresher learning of any topic that is a basic requirement for your role, you will be awarded **no more than 3.5 CPD** points per annum.
- The number of points and categories required may be reduced if you have an extended absence from work.

3. Qualifying activities and categories

This section of the guidance provides details about activities that count towards the CPD Scheme.

3.1 Qualifying CPD activities

For an activity to qualify for CPD points, it must:

- (a) be at a suitably advanced and technical level. CPD activity required during the 2018/19 grant agreements period should mainly focus on debt advice at a sufficiently technical level to develop an adviser's knowledge and practice.

The maximum level of CPD that can be undertaken at the level in which an adviser works (refresher training) will be **3.5 points worth of activity**.

For example, working at Advice Work level, you are expected to already have the knowledge and skills covered by learning such as Wisera's 'What are the insolvency options?' or IMA's 'Money Advice in Practice'. You can complete refresher learning at that level, but irrespective of how many courses undertaken, only 3.5 points will count towards your annual total requirement of 16 points. This is because the majority of CPD activity should be developmental, i.e. above the level at which you currently work.

- (b) have a sufficient link to the law and/or practice of debt advice
- (c) be undertaken in addition to your normal work duties
- (d) fall into one of the four **activity categories**
 - (i) Training
 - (ii) Meetings and forums
 - (iii) Qualifications
 - (iv) Research, reading and writing

Each CPD activity attracts a number of points depending on the type, and sometimes duration, of the activity. The points attracted by different kinds of activities are given in [Appendix 1 – Table of CPD Activities and Points](#).

3.2 Activity categories

To count towards the scheme, an activity must fall into one of these four categories:

- (i) Training
- (ii) Meetings and forums
- (iii) Qualifications
- (iv) Research, reading and writing

Each category has some general requirements which are detailed below.

Remember, for an activity to count towards the scheme under any of the categories, it must also meet the general requirements for a CPD activity.

3.2.1 Training

Training aims to impart knowledge or skills to attendees of the activity. Common activities that may count under as training include:

- Formal face-to-face training courses (or **interactive** webinars)
- Completing e-learning modules
- Attending informal training
- Delivering training
- Writing new training courses.

Formal training will have been accredited by a body such as the Money Advice Service or Skills Mark, **or** will be provided by a recognised training provider (e.g. the IMA, Wiseradviser, Citizens Advice, Shelter etc.) It is usually delivered face-to-face, however, if a training session is delivered remotely through an interactive webinar, this can also count as formal training provided that the content/structure is similar to a face-to-face session and includes live participation from the attendees.

E-learning will usually be delivered by a recognised provider (e.g. Wiseradviser). Any time estimate given by the provider will be used when calculating the number of points awarded for e-learning activities.

Informal training which isn't developed or delivered by a recognised provider should share many of the same characteristics as formal training, such as:

- a training plan with clear aims / objectives / learning outcomes
- learning materials or supporting information (e.g. handouts, notes, presentation)
- being an interactive learning experience
- a record of attendees/trainer or attendance certificates
- some form of trainer and course evaluation

Writing or delivering training can also count as a qualifying CPD activity, provided that the training written or delivered shares the characteristics of training listed above. You can only claim for writing or delivering a training course once – not for subsequent updates or multiple instances of delivering the same training course.

Remember, you must record at least one training activity in each CPD year to meet the requirements of the scheme.

3.2.2 Meetings and forums

A meeting or forum tends to be less focused on imparting knowledge or skills on the attendees, but instead provide opportunities for attendees to discuss relevant matters, share topical knowledge or discuss wider strategy. While technical discussions may form part of the agenda, meetings and forums typically lack the required elements for a 'training' activity.

If you think a meeting could possibly count as training, you should send us full details of the meeting agenda, plus copies of any learning materials or other supporting documents.

Attending conferences that meet the other requirements in [3.1](#) count under this category.

Money Advice Group (MAG) meetings will count under the 'meetings and forums' category. MAGs attract more points than most other meetings because of the typical content and duration of the meetings.

Other meetings such as MALG regional meetings, MAS peer reviewer meetings, discussion forums or consultation meetings may count provided that the agenda or topics discussed meet the requirements in [3.1](#).

Internal or staff meetings which focus mainly on ways for working, performance or internal practice are **unlikely** to meet the criteria in [3.1](#), particularly points (a) and (b).

Contributions to internet discussion forums do not count as qualifying CPD activities.

3.2.3 Qualifications

Qualifications must be awarded by a recognised awarding body or academic institution.

You will fully meet the 16 CPD points requirement if you pass the IMA Certificate in Money Advice Practice during this CPD period (April 2018 to February 2019).

For other qualifications you can claim a number of CPD points equivalent to the actual number of hours spent studying or building a portfolio of evidence (for vocational-type qualifications). You can claim either for the whole qualification once you have completed it or for individual modules studied within the relevant CPD period.

Any time estimates provided by the institution for the completion of a qualification will usually be used by the IMA to calculate the number of points awarded.

3.2.4 Research, reading and writing

It is particularly important that any activity in this category is undertaken ***in addition to your normal work*** – researching individual cases as part of your normal role **would not** count.

Reading would usually be undertaken without a particular topic or goal in mind, for example regular reading of Quarterly Account.

For general reading there is a limit of 2 CPD points in any CPD year.

Research would usually be undertaken in a more structured way; around a particular topic with a specific purpose in mind such as producing a written article for publication or technical content for a report.

Research and writing are also often closely linked, research usually accompanying any writing of articles or reports you produce. Because of this, any activity that attracts points under the research, reading and writing category can be claimed only once.

Pre-recorded (non-interactive) webinars would count under this category.

Any research and writing undertaken to produce training should be claimed in the training category.

Responding to consultations may also count under this category if you are expressing an informed opinion or you undertake some research to inform your response.

Listening to podcasts may also count under this category, provided that the podcast meets the other requirements for a qualifying CPD activity and is at least 20 minutes in length.

We may limit the number of podcasts allowable under this category if there is an overreliance on them to meet the minimum requirements of the scheme.

4. Recording and submitting your activities

For the April-June period only, an organisation should complete the 'CPD activity log June 2018' spreadsheet for all its MAS-funded advisers. Thereafter, you should record all your learning and development activities on your online CPD Record, available on the Wiseradviser learning management system **from August 2018**.

Once we transition from the excel record to the online tool, we will upload the previously submitted data, so you will receive an up to date online record of your CPD to date. We will send out full communication and instructions related to the online recording tool in due course.

You should also keep evidence of your activities in case you are requested to provide proof of them (see 5.1 below)

4.1 Submitting your CPD record

You need to submit your completed CPD record, no later than **the following deadlines:**

- 27th July 2018 (for this date only, please email your CPD record to contactus@moneyadvicetrust.org)
- 5th October 2018 – (further guidance will be provided on how to submit evidence of CPD)
- 11th January 2019
- 15th February 2019

5. Verification and evidence

We will check your CPD record to ensure that you have met the requirements of the scheme. If we need more information to verify your record we will contact you.

5.1 Evidence of CPD activities

You should keep evidence of your CPD activities in case we need to verify them.

We may request evidence from you if:

- You are selected as part of the random sample selected to provide evidence, or,
- We need to verify that one or more of the activities on your CPD record meet the requirements in [3.1](#).

If we need evidence we will contact you and let you know which activities we need you to provide evidence for. We will also give you a timeframe within which you need to provide the evidence (usually within 1 month of our request).

If we cannot verify an activity based on evidence provided, the activity may be disallowed and will not attract any points under the scheme.

5.2 Examples of acceptable evidence

Evidence for activities is considered on its own merits. The following are examples of evidence which has previously been accepted for various activities. This list is not exhaustive.

5.2.1 Training

Please provide a copy of your attendance certificate, or a printout/screenshot of the completion screen if the training was online or eLearning.

Where no certificate was provided (e.g. informal training) a copy of the official attendance list is also likely to be acceptable.

You may also use the **Evidence of Attendance** form (attached at Appendix 4 – Evidence of attendance) if there is no other evidence available. This should be completed and signed and dated by either the event organiser or your supervisor/manager.

If you have written or delivered training, we would expect to see some documentary evidence of this (e.g. course materials, attendance lists, completed feedback forms etc.)

5.2.2 Meetings and forums

A copy of the official minutes showing your name would usually be sufficient evidence of attendance.

You may also use the **Evidence of Attendance** form (attached at Appendix 4 – Evidence of attendance) if there is no other evidence available. This should be completed and signed and dated by either the event organiser or your supervisor/manager.

5.2.3 Qualifications

Either a confirmation of your passing grade, an academic transcript showing the date of the award or a copy of any certificate would all be acceptable.

Alternatively, you can choose to provide evidence of individual modules (from a modular qualification) that have been completed within the CPD period. Any evidence should be dated and we may need to see details of the course outline, module content or samples of your work.

5.2.4 Research, reading and writing

You should keep copies of any documents showing your involvement in research projects or social policy research/reports. We may ask for copies of documents showing your involvement such as articles, journals, training materials or consultation responses etc.

If you wish to claim CPD points for reading journals or other industry publications, you will need to specify the titles and editions you have read. If you are selected to provide evidence, we may ask you to show that you have continued or recent access to a journal you have claimed points for. We will usually do this by asking you to refer to a specific article in a recent edition.

6. Non-compliance, reviews and appeals

6.1 Non-compliance

During February 2019 an external and independent verification process for CPD will go ahead, which will involve a check on the correct amount of qualifying CPD activity being completed by MAS funded advisers. If advisers have not submitted the correct amount of CPD activity, this will result in a deduction being made to the organisations' CPD & Training budget, and recovered where this has been paid in advance

6.2 Reviews and appeals

Further guidance will follow with details on how to request a review or appeal.

Appendix 1 – Table of CPD Activities and Points

You need a minimum of 16 points from 3 categories, including at least 1 training activity. Irrespective of the points listed below, where you undertake refresher learning of required knowledge for your role, only 3.5 points can be awarded in any one year. The remaining 12.5 points **MUST** be developmental activity above the level of your role.

Activity Category	Activity Description	Points
Training	Participating in formal training: (face to face or equivalent) <ul style="list-style-type: none"> • Full day • Half day • Less than half day 	4.5 2 1
	Undertaking eLearning: <ul style="list-style-type: none"> • More than 4 hours • More than 1 hour – less than 4 • Less than 1 hour 	4.5 2 1
	Attending informal training: (min 2 hours duration): <ul style="list-style-type: none"> • More than half day • Less than half day 	2 1
	Delivering formal or informal training	2
	Writing new training materials (claim as training, cannot be jointly claimed with delivery)	3
Meetings and forums	Conferences (per day)	4.5
	Money Advice Groups (MAGs)	3
	Other meetings or committees such as Money Advice Liaison Group (MALG), Discussion Forums, Consultation meetings, etc.	2
Qualifications	IMA CMAP qualification, examination and study (if passed)	Accredits until next CPD year
	Professional qualifications; Degree, Certificate, Diploma*	Hours spent studying & exam
	Work towards the achievement of a QCF (was NVQ) in related area*	Hours spent building a portfolio of evidence and/or attending lectures etc.
Research, reading and writing	Journals and industry publications (max. 2 points per year)	2
	Research/social policy activity including production of written document	2
	Writing articles for journals or industry publications	2
	Podcasts or pre-recorded webinars (min of 20 minutes length)	1

* you may claim the entire course once you complete successfully **or** claim modules individually within the relevant CPD period.

Appendix 2 – Eligible IMA learning

Does not attract CPD points	✗
Counts as refresher training for Advice Work (AW) level advisers (max. 3.5pts in year)	<input type="checkbox"/>
Counts as developmental training for Advice Work (AW) level advisers	<input checked="" type="checkbox"/>
Counts as refresher training for Caseworker/Specialist (CS) and above level advisers (maximum 3.5pts in total during the year)	<input type="checkbox"/>
Counts as developmental training for Caseworker/Specialist (CS) and above level advisers	<input checked="" type="checkbox"/>
Counts as developmental training for IMA accredited members	<input checked="" type="checkbox"/>

IMA courses for MAS CPD scheme	Points	AW	C/S	IMA
Giving a Good Service to Clients	0	✗	✗	✗
Training for Trainers	0	✗	✗	✗
Understanding and Managing Stress at Work	0	✗	✗	✗
Courses within MAS advice work activity set – <input type="checkbox"/> refresher training for AW advisers (max. 3.5pts in year 1)				
Money Advice in Practice	0	<input type="checkbox"/>	✗	✗
Referrals & Supporting Clients	0	<input type="checkbox"/>	✗	✗
Courses within MAS caseworker/specialist activity set equivalent – <input type="checkbox"/> developmental for AW advisers (no point limit) and <input type="checkbox"/> refresher for C/S+ advisers (max. 3.5pts in year 1)				
Managing Cases and Caseloads	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
Money Advice Foundations	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
Courses beyond MAS caseworker/specialist activity set – <input type="checkbox"/> developmental for AW and C/S+ advisers (no point limit)				
Bankruptcy: The Tricky Bits	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Challenging Interest and Charges	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Charging Orders	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Coping with Council Tax: Essential Knowledge and Expert Tips	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dealing with Utility Debt	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Deficit Budgets	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DRO Law & Theory	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DRO Practice and Procedures	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Facing Courts & Tribunals (<i>does not count for court-rep accredited advisers</i>)	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FCA Compliance and Quality of Advice	4.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

IMA courses for MAS CPD scheme	Points	AW	C/S	IMA
High Court Enforcement	4.5	■	■	■
Insolvency Options	4.5	■	■	■
Money Advice Legal Update	4.5	■	■	■
Preparing Cases for Court <i>(does not count for court-rep accredited advisers)</i>	4.5	■	■	■
Rent Possession Proceedings: Defences and Tactics	4.5	■	■	■
Square Peg Debts	4.5	■	■	■
Supervising Money Advice	4.5	■	■	■
Taking Control of Goods : An Introduction	4.5	■	■	■
Unfair Relationships under the CCA 1974	4.5	■	■	■
Universal Credit: An Essential Guide	4.5	■	■	■
Universal Credit: The Tricky Bits	4.5	■	■	■
Using the FCA Handbook	4.5	■	■	■
Vulnerability, Mental Health and Debt	4.5	■	■	■
Welfare Reform Update	4.5	■	■	■

Appendix 3 – Eligible Wiseradviser learning

Does not attract CPD points	×
Counts as refresher training for Advice Work (AW) level advisers (max. 3.5pts in year)	<input type="checkbox"/>
Counts as developmental training for Advice Work (AW) level advisers	<input checked="" type="checkbox"/>
Counts as refresher training for Caseworker/Specialist (CS) and above level advisers (maximum 3.5pts in total during the year)	<input type="checkbox"/>
Counts as developmental training for Caseworker/Specialist (CS) and above level advisers	<input checked="" type="checkbox"/>
Counts as developmental training for IMA accredited members	<input checked="" type="checkbox"/>

Wiseradviser courses for MAS CPD scheme	Points	AW	C/S	IMA
Behavioural theory and its application in advice change	0	×	×	×
Boost your own development	0	×	×	×
Giving effective advice by email	0	×	×	×
Giving effective telephone advice	0	×	×	×
Understanding and supporting clients in vulnerable circumstances	0	×	×	×
Virtual client interview: you decide!	0	×	×	×
Courses within MAS advice work activity set – <input type="checkbox"/> refresher training for AW advisers (max. 3.5pts in year 1)				
Credit referencing: the essentials!	1	<input type="checkbox"/>	×	×
Good practice: high quality debt advice	4.5	<input type="checkbox"/>	×	×
Insolvency options: putting it into practice	4.5	<input type="checkbox"/>	×	×
Introduction to money advice	4.5	<input type="checkbox"/>	×	×
Negotiation and communication: strategies & tactics	4.5	<input type="checkbox"/>	×	×
Selecting appropriate advice methods and tools	2	<input type="checkbox"/>	×	×
Supporting clients to self-help	1	<input type="checkbox"/>	×	×
Tailoring advice: strategies and options for dealing with debt	4.5	<input type="checkbox"/>	×	×
What are the insolvency options?	4.5	<input type="checkbox"/>	×	×
Courses within MAS caseworker/specialist activity set equivalent – <input type="checkbox"/> developmental for AW advisers (no point limit) and <input type="checkbox"/> refresher for C/S+ advisers (max. 3.5pts in year 1)				
Cashflow: how to use the tool effectively	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	×
Council tax: liability and enforcement	4.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	×
Debts in the county court: a detailed overview	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	×

Wiseradviser courses for MAS CPD scheme	Points	AW	C/S	IMA
Debts in the county court: putting it into practice	4.5	■	□	×
Get started with the common financial statement (CFS): a how-to guide for advisers	1	■	□	×
Getting to grips with your personal caseload	1	■	□	×
Introduction to clients in rented housing	1	■	□	×
Introduction to income maximisation	1	■	□	×
Skills for effective advocacy	4.5	■	□	×
Standard financial statement: advisers	1	■	□	×
Supporting clients with deficit budgets	4.5	■	□	×
Taking control of goods: be the enforcement officer	1	■	□	×
Courses beyond MAS caseworker/specialist activity set – □ developmental for AW and C/S+ advisers (no point limit)				
Advising clients with water debts	1	■	■	■
Basic banking rights	1	■	■	■
Benefit overpayment and debt	4.5	■	■	■
Business debts: self-employed clients and directors of limited companies	4.5	■	■	■
Calculating universal credit	1	■	■	■
Child maintenance: collection and enforcement	4.5	■	■	■
Consumer credit act: checking the agreement	1	■	■	■
Consumer credit act: hire purchase, bills of sale and car finance agreements	1	■	■	■
Consumer credit act: lender obligations (post contract)	1	■	■	■
Consumer credit act: time orders	1	■	■	■
Consumer credit act: unfair relationships provisions	1	■	■	■
Debt relief orders: approved intermediary workshop	4.5	■	■	■
Debts in the high court	2	■	■	■
Defending money claims in the county court	4.5	■	■	■
Developing quality debt advice	4.5	■	■	■
Introduction to charging orders	1	■	■	■
Introduction to student loans	1	■	■	■
Introduction to the welfare reform act: universal credit and personal independence payments	2	■	■	■

Wiseradviser courses for MAS CPD scheme	Points	AW	C/S	IMA
Mental health: good practice for debt advisers	4.5	■	■	■
Mortgage arrears and possession action	4.5	■	■	■
Mortgage possession proceedings	4.5	■	■	■
Parking penalties: the essentials	2	■	■	■
Payday loans: the facts	1	■	■	■
Recovering financial penalties in the magistrates' court	4.5	■	■	■
Rent arrears: your client's status, rights and options	4.5	■	■	■
Taking control of goods: changes to bailiff law april 2014	1	■	■	■
The essentials! Financial conduct authority and consumer credit	1	■	■	■
Time limits for recovering debts through the courts	4.5	■	■	■
Time orders	4.5	■	■	■
Consumer credit act: the basics	1	■	■	×
Supervision: essential skills and best practice	4.5	■	■	×
Supporting clients with learning disabilities	4.5	■	■	×
Supporting clients in vulnerable circumstances	4.5	■	■	×

Appendix 4 – Evidence of attendance form

Confirmation of Attendance for CPD Scheme for MAS funded advisers

I attended the following event	
Date of event	
The name of the person who is confirming my attendance	
The role of the person who is confirming my attendance (please indicate)	<ul style="list-style-type: none">• Event organiser or chair person• Event administrator or secretary• My supervisor or manager
Dated and signed by the person confirming my attendance	Date: Signature:

Appendix 5 - Extended absences policy

If we are made aware of an extended period of absence, we may be able to adjust your CPD requirements for affected CPD periods.

We may relax the requirements of the CPD scheme in terms of the number of points you need to accumulate and/or the number of activity categories you must meet. Allowances will be weighed on a pro-rata basis, where we deem this to be reasonable. This will help you to plan activities before and after you return.

If you are away from work for an extended period of time, please inform us as soon as possible by emailing to contactus@moneyadvicetrust.org and provide:

- The reasons for your absence
- Any known start and end dates for your absence.

We are likely to make allowances where your absence from work is due to extended ill-health, disability or maternity. Absences for other reasons can be considered at the discretion of MAS.

We do not make allowances for career breaks, taking on new jobs/roles or to account for workload pressures.

Please note we do not reduce CPD requirements because you work part-time, take extended holiday or to account for work pressures/temporary roles outside of debt advice. The need for up to date advice is equally important for clients served by part-time and full-time advisers.

Short term absence (less than 1 month) will not usually qualify for any adjustments.

Absences and number of CPD points required

We agree to reduce the number of CPD points you need to remain accredited, we will reduce your point requirements for the affected CPD period(s) based on the number full months you spend in work during the period, rounded to the nearest 0.5 points.

Full months are calculated as follows:

- Before an absence – each complete calendar month between 1 April and the end of the month immediately preceding your absence.
- After an absence – each complete month between the 1st of the month following your return to work and 15th February 2019.

The number of points needed based on the number of full months in work is as follows:

Full months	Points req.	Full months	Points req.	Full months	Points req.
1	1.5	5	6.5	9	12
2	2.5	6	8	10	13.5
3	4	7	9.5	11	14.5
4	5.5	8	10.5	12	16

If you are absent for the whole of a CPD year, please contact us to discuss your options.

Absence and activity categories

Ordinarily you must submit activities from 3 categories. If your absence is covered by this policy the number of categories required to remain accredited may be reduced depending on the number full months you spend in work during the period:

- 7 – 12 full months in work = points from 3 categories required (no reduction)
- 4 – 6 full months in work = points from 2 categories required
- 1 – 3 full months in work = points from 1 category required

We have discretion to allow records that do not meet the above guidance on a case by case basis.

Returning from absence

You should inform us as soon as practicable once you have returned to work from an extended absence.