

Insurance Council

BRITISH COLUMBIA

PROGRAM GUIDELINE:

Continuing Education Accreditation for Individual Courses

DRAFT FOR CONSULTATION

1. Purpose

This program guideline outlines foundational components and processes for the Insurance Council of BC's ("Insurance Council") accreditation of continuing education courses on an individual basis. Accreditation requests for individual courses will be assessed based on the criteria outlined in this document.

2. Definition of Continuing Education

Continuing Education ("CE") is learning that helps fulfill the knowledge required to maintain a standard of professional competence and remain current in an ever-changing industry. Under Council Rule 7(5), insurance licensees must meet the requirements of the Insurance Council's continuing education program. Continuing education must take place in a structure dedicated to learning, such as a classroom, office setting or online.

3. Assigning CE Credit Hours

- a. One hour of instruction is equal to 1 CE credit. Each 15-minute increment of course instruction is equal to 0.25 course credit.
- b. A course that exceeds 15 hours may require additional information in the application process.

4. Course Content

Course content must meet Insurance Council requirements. Continuing education program requirements are outlined in the [Continuing Education Guidelines](#) for each licence class. Review these guidelines to ensure your course meets the Insurance Council's course content guidelines.

- a. For **salespersons, level 2 agents, adjusters, and travel agents**, qualifying insurance continuing education includes technical material directly related to:
 - General insurance products;
 - Compliance with insurance legislation and licensee requirements such as the Council Rules, Insurance Council Code of Conduct, the *Financial Institutions Act* and privacy legislation,
 - Ethics; or
 - Errors and omissions insurance.
- b. For **level 3 agents**, "technical material" is broadened to include courses relating to management, accounting and human resources.

- c. For **life and/or accident and sickness insurance agents**, qualifying continuing education includes technical material directly related to:
- Life and/or accident and sickness insurance products;
 - Financial planning, provided the education is geared to life insurance and not a non-insurance sector, such as securities or mutual funds;
 - Compliance with insurance legislation and requirements such as the Council Rules, Insurance Council Code of Conduct, the *Financial Institutions Act*, privacy legislation and anti-terrorism/money laundering legislation;
 - Ethics; or
 - Errors and omissions insurance.
- d. Course content not accepted:
- Marketing or sales techniques;
 - Service;
 - Training on how to use computer programs;
 - Self improvement or self help; and
 - Non-insurance products.

5. Course Instructor

The Insurance Council does not accredit or provide verification of instructor credentials. It is the responsibility of the course provider to verify the course instructor is a qualified subject matter expert, is in good standing with the Insurance Council (if licensed) and has the relevant education and/or experience to educate licensees on the content matter. Course providers assume responsibility for monitoring effectiveness of instructional delivery of the material and providing feedback to instructors.

6. Records and Certification

In accordance with Council Rule 7(5), licensees must maintain valid records of continuing education course attendance and completion for Insurance Council audits.

The course provider is expected to keep attendance records for a period of two (2) years from the course date for audit purposes and ensure all courses including online seminars, webcasts or conferences have a verifiable method of confirming attendance (such as sign-in and sign-out sheets, scanned badges, passing exam/quiz or roll call) for the entire presentation.

- a. **Attendance records:** Participants are required to attend the full duration in order to receive a continuing education completion certificate. It is expected that the course provider create and maintain attendance documentation. The Insurance Council may request attendance documentation at a later date.

The Insurance Council suggests the following or similar attendance tracking methods:

Online

- **Asynchronous Course:** Participant tracking at the start, middle and end of course (e.g., virtual sign in, documented roll call, etc.). Knowledge Checks throughout (e.g., polls, live chat). Passing exam/quiz that assess the entirety of course content.
- **Synchronous Course:** Knowledge Checks throughout (e.g., polls, live chat etc.). Passing exam/quiz that assess the entirety of course content.

In-person

- Participant attendance sheet that tracks participant sign in and sign out time.
- Passing exam/quiz that assess the entirety of course content.

- b. **Course Completion Certification:** A continuing education completion certificate should be provided to each licensee attendee within 30 days of the course completion date. A continuing education completion certificate cannot be issued unless the individual attended the entirety of the course and passed any required assessment. A continuing education certificate template can be found in the Insurance Council's Online Accreditation website.

7. Course Evaluation

The course provider is expected to conduct regular evaluation of course content to monitor the quality of the material and ensure it meets current industry standards.

8. Application Process

Upon reviewing the *Continuing Education Accreditation for Individual Courses* program guideline:

- Complete the relevant Course Accreditation Request on the Insurance Council's Online Accreditation website.
- Ensure the Course Accreditation Request information is completed in full and submit the request application through the Online Accreditation website.

- Once the application has been received, the processing time varies depending on the number of courses and completeness of application. If there are any materials missing from the application, the processing time may be longer.
- The Accreditation Committee will communicate application status once the review is complete.
- If a course is denied accreditation, the Accreditation Committee will communicate to the applicant and note the discrepancies.

9. Modifications to Existing Courses:

If there are major course changes within the period of accreditation, a new course accreditation request must be submitted. Major changes include change in content, credit hours or course length.

10. Appeals and Resubmissions:

All accredited courses are valid for three (3) years from the date of approval. Upon expiration, reapplication for accreditation will be required.

- a. **Re-application:** It is the responsibility of the applicant to follow the same process for course accreditation after expiry, which involves adhering to the *Continuing Education Accreditation for Individual Courses* program guidelines, completing and submitting the correct course accreditation information, and paying applicable fees.
- b. **Appeals:** Appeals must be submitted by email correspondence to accreditation@insurancecouncilofbc.com. Appeals will only be reviewed if received within 30 days of the initial committee review.