

CIMA professional development form

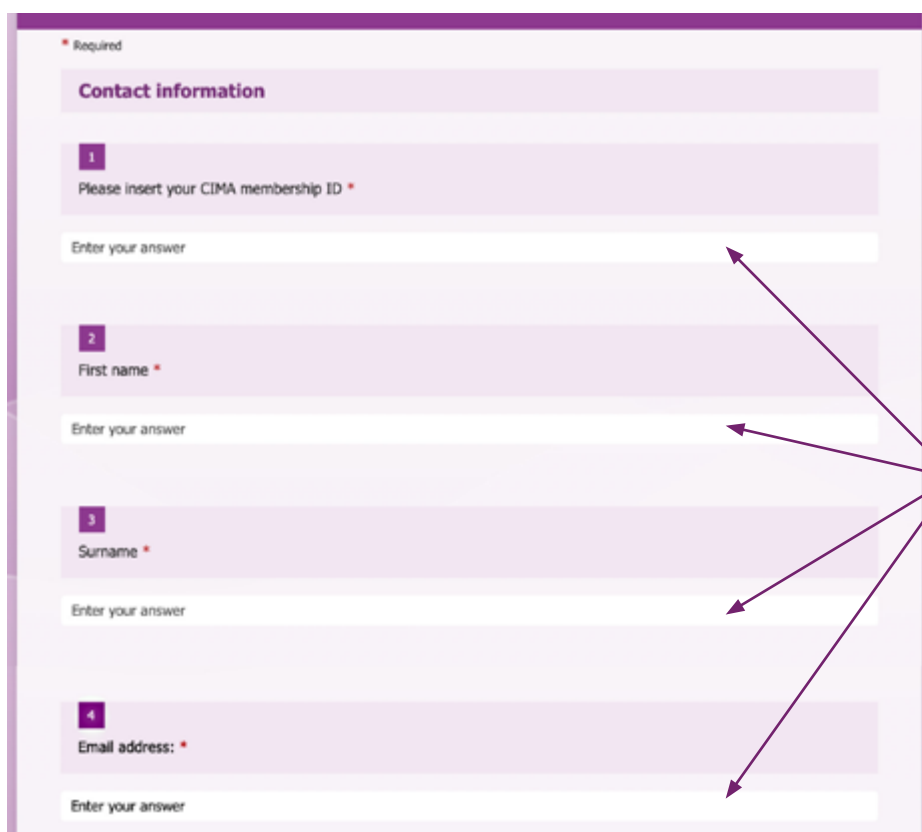
Guidance on how to use the form, easily record
and submit your CPD record.

CIMA CPD is a mandatory requirement for all CIMA members. It helps you structure your professional development. As part of the CIMA Professional Development, members are required to work through the CPD cycle at least once a year.

The CIMA professional development form will help you to record your learning activities, edit them and once ready you can send this to CIMA upon the CPD monitoring selection.

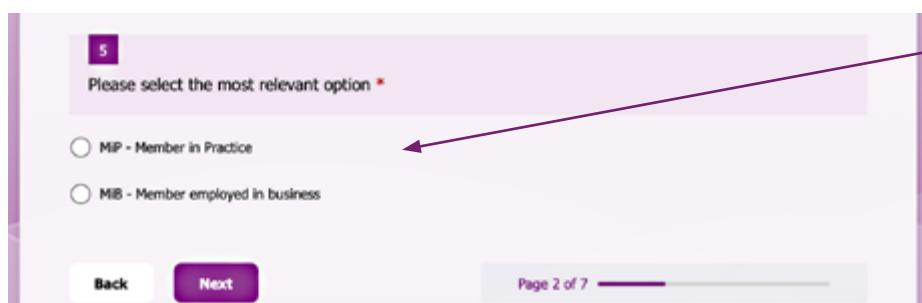
In this guide you can find how to:

- Record your learning activities and progress
- Submit to CIMA if you have been formally selected for CPD Monitoring
- Save your CPD record on your device (this is both for selected and non-selected members)



Insert all your details,
such as CIMA Contact ID,
full name and email address.

Your edits will get saved
as you move along the form.



Select whether you're a
Member in Practice or
employed in business.

If you are both employed and in
practice, please include in the next
section any details and development
needs for both roles.

Click **Next** to progress.

In the **DEFINE** section you will be able to include any information about your current role, as well as your desired role and expectation around it.

DEFINE: Define current and desired roles recognising expectations of employers and others

What is your current role and key responsibilities?

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Please state your current job title

Enter your answer

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What are the key responsibilities within your current role?
If you are working towards a new role, please also include a brief outline of the desired role below.

Enter your answer

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Please include a short description of key responsibilities within your current role, a new role also include a brief outline of this.

You can use short bullet points to do this.

Click **Next** to progress.

Record your learning activities and progress

ASSESS - DESIGN - ACT - REFLECT

The next steps of CIMA's CPD cycle are assess, design, act and reflect. This section will help ensure your CPD record includes those.

List each of your development objectives through identifying any skills gaps.
The CGMA Competency Framework can help you do this.
It is designed to help management accountants, finance professionals and their employers understand the knowledge requirements and **ASSESS** the skills needed for both current and desired roles.
<https://www.aicpa-cima.com/resources/landing/cimas-cgma-competency-framework-a-framework-for-success>

Below each development activity field, **DESIGN** how you will **ACT** to meet your learning objectives, include the relevant learning activity undertaken, and **REFLECT** on how each of the development objectives went.
A short reflective statement could include:

- what can you do now that you couldn't do before?
- was the objective met? If not, what else do you need to do to meet your development needs?
- is there anything you would have done differently to meet your development objective?

**It is mandatory that you include the dates against your learning activities.
Please include the start date, and once completed, the end date.**

Scroll down to the bottom of the page once you have added all your learning objectives. If you need to add more learning objectives you can do so from there, or move on to the next section.

(3,000 character limit per text box)

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Development objective 1
Please use the text box below to assess a CPD development need, and what you would do to meet it.

Enter your answer

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What **learning activity** did you undertake to meet **development objective 1**?
Please include start / end date for each learning activity and a short **reflective statement**.

Enter your answer

There are 10 development objective and learning activity boxes on the first page.

You don't need to add 10 development objectives, just fill as many as you think as necessary.

In the first box, please record your development objective and describe what you would need to achieve it.

In the second box, please describe the learning activity you have undertaken to meet your development objective.

Including dates for each learning activity is mandatory.

Please also include a reflective statement for each one.

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Would you like to add more development objectives? *

☐ Yes, add more development objectives

☐ No, move on to next section

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If you have more learning to report, click '**Yes, add more development objectives**'.

If you need to add more development objectives and learning activities, please click '**add more**' at the end of the page in the form.

You will be redirected to another page with further 10 boxes to use.

You can include up to 20 development objectives on one form.

EVALUATE

Use this section to evaluate your **overall progress** against your recent development objectives. Think about how meeting your objectives has developed your overall skills and competencies.

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Evaluate how you completed the development objectives for your CPD in the text box below.

Please consider whether meeting your development objectives helped advance you in your current role or created new career opportunities?

- Are there any objectives you didn't meet?
- If so, will you roll these over into your next cycle on continuous learning?

(3,000 character limit)

Enter your answer

If you have 10 or less development objectives, please click on '**No, move on to next section**', and click **Next**.

Once you record your development objectives and relevant learning activities, please evaluate your progress.

Use the prompts to help to create your final evaluation.

If you have been selected for CIMA CPD Monitoring

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Each year CIMA randomly selects a sample of members to submit their CPD records for monitoring. If you have been selected you will have been formally notified by email. *

☒ Yes, I have been formally selected to submit my CPD record to CIMA for monitoring (the next section will provide you with more information to ensure your record is complete and allow you to submit your record for monitoring once you are happy it is ready).

☐ No, I have not been formally selected to submit my CPD record to CIMA for monitoring (if you have completed all updates to your record please select 'submit' to save your changes. If you want to make further updates please select the 'back' button).

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If you have been formally selected for CIMA CPD Monitoring, click on '**Yes...**' to be redirected to the next section.

For members that have been selected for CPD monitoring only:

You are only required to submit your CPD record to CIMA if you have been formally requested to do so. If you have been selected, and once you are happy that your record is ready for submission, select the '**submit my CPD record**' option.

Please note, CIMA will only assess the records of members who have been formally selected for CPD monitoring. Please ensure that:

- each development objective has the relevant learning activities undertaken and include a short reflective statement
- start and end dates (where completed) are added to each learning activity
- you have clearly documented and dated your CPD covering the 12 month monitoring period (the monitoring period will be in your CPD monitoring notification email)
- you have completed the **EVALUATE** section, providing information on how your overall development objectives went
- your CPD record is complete and ready for submission to CIMA for monitoring

(3,000 character limit)

Please use the checklist in the box to ensure you have completed all mandatory steps for CPD Monitoring.

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Verification *

Please select 2 options.

☐ I verify that this record is a true reflection of my development needs identified and the learning activities undertaken for the required CPD monitoring period.

☐ I am ready to **DOWNLOAD A COPY OF MY CPD RECORD** and **SUBMIT IT TO CIMA** for CPD monitoring.

You can print a copy of your answer after you submit

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Verify your answers before submitting.

If you have been selected for CIMA CPD Monitoring

Please see below, in the 'Save your CPD' section how to save your CPD record as you will need to email a copy to CIMA at cpd.monitoring@aicpa-cima.com

If you haven't been formally selected for CIMA CPD Monitoring

Please remember that you don't need to submit your CPD record to CIMA, but you can save it for your records. Please follow the steps below to do so.

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Each year CIMA randomly selects a sample of members to submit their CPD records for monitoring. If you have been selected you will have been formally notified by email. *

☐ Yes, I have been formally selected to submit my CPD record to CIMA for monitoring (the next section will provide you with more information to ensure your record is complete and allow you to submit your record for monitoring once you are happy it is ready).

☒ No, I have not been formally selected to submit my CPD record to CIMA for monitoring (if you have completed all updates to your record please select 'submit' to save your changes. If you want to make further updates please select the 'back' button).

You can print a copy of your answer after you submit

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If you haven't been formally selected for CIMA CPD Monitoring, Please select 'No...' to be redirected to the next section.

Save your CPD record

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Thank you for updating your CPD record, your changes have been made.

If you were selected for CPD Monitoring, you must now save a PDF copy of your CPD record and send it to cpd.monitoring@aicpa-cima.com. To save your CPD record as a PDF document, please click on the three dots in the top right-hand corner of this screen, and save it on your device.

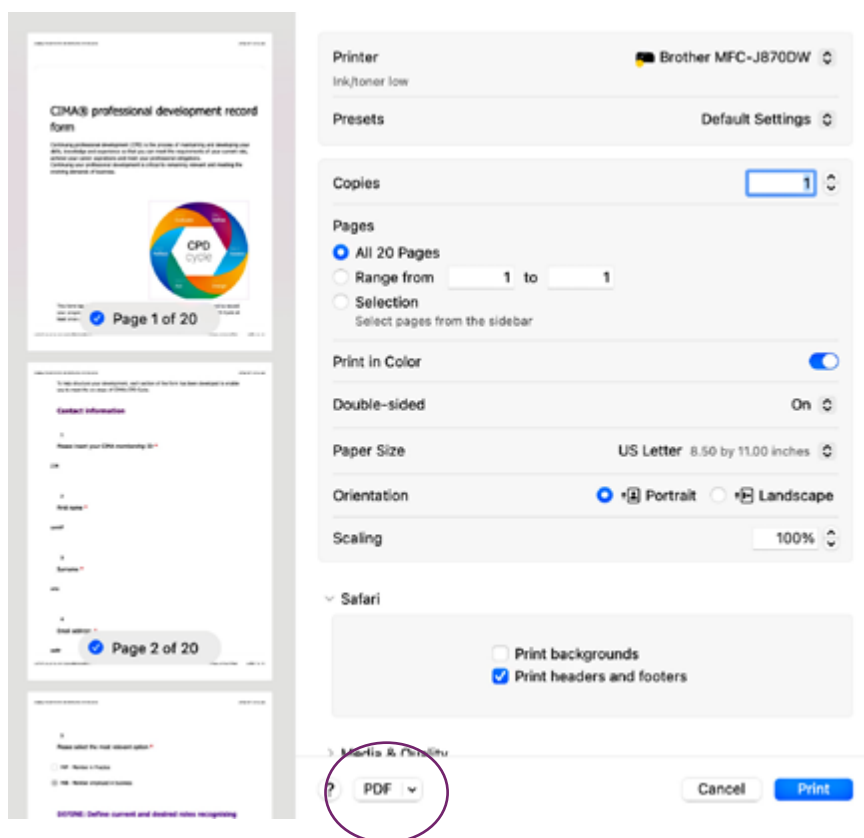
If you haven't been selected for CPD Monitoring and would like a PDF copy of your CPD record, please click on the three dots in the top right-hand corner of this screen, and save it on your device.

Important thing you can do next

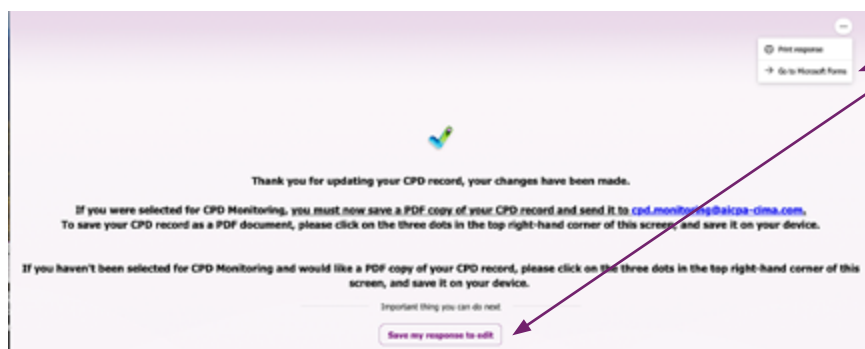
Save my response to edit

To save your record on your device, click on the three dots in the top right-hand corner of the screen.

Follow the instructions below to know how to save your CPD record.



← A pop-up window will appear, you only need to decide the location in which you wish to save your CPD record.



Once you saved your CPD record, you can access, view and edit your CPD record, by clicking on either 'Go to Microsoft forms' or 'Save my response to edit'.

If you have been formally selected for CIMA CPD monitoring and submitted your CPD record via email, you will receive a confirmation message, please also check your spam inbox.

Please note that if you edit your record after you have submitted it, CIMA won't be able to check your latest updates, and you will need to send a new email to **cpd.monitoring@aicpa-cima.com** including your latest updates on your CPD record.