

## Application for pro rata adjustment of CPD requirements

Membership number	<input type="text"/>	Email address	<input type="text"/>
First name	<input type="text"/>	Contact number	<input type="text"/>
Surname	<input type="text"/>	Employer	<input type="text"/>

\*Note

1. See [CPD Guidelines & Regulations](#) for pro rata rules. A pro rata adjustment of CPD hours will be applied in the case of long-term sick-leave (2 months or more) and statutory leave (maternity (current maximum 42 weeks i.e. up to 26 weeks paid and up to 16 weeks unpaid leave) /adoption/block parental/carer's leave. Include statutory paid and unpaid leave only, do not include holidays prior to or following statutory leave and do not include career break etc.).
2. A pro rata adjustment of CPD hours will not be applied in the case of short-term sick leave, part-time work/job sharing, holidays, other short-term leave and career break.
3. A member on a Minimum Competency Code "MCC" CPD scheme out of work on statutory/sick leave for more than 12 months is required to read and assimilate the CPD Annual Update Manuals for absent year(s) on returning to CPD (available in 'CPD Downloads' tab in 'IOB Learn' at [iob.ie](#)).

Date of leave (start)	<input type="text"/>	Date of leave (end)	<input type="text"/>
Statutory maternity / adoption leave	<input type="checkbox"/>	Statutory block parental leave	<input type="checkbox"/>
Long term illness	<input type="checkbox"/>	Carer's leave	<input type="checkbox"/>
Other (please attach letter with further details)	<input type="checkbox"/>		<input type="checkbox"/>

Please attach any of the following confirming the above leave and dates (i) Letter/email from employer; (ii) Signature on this form below from employer; (iii) Other supporting documentation e.g. maternity leave agreement or medical certs.

Incomplete forms will be returned to the applicant.

### Data protection notice

#### About this data protection notice

This is a statement of the practices of The Institute of Bankers in Ireland, 1 North Wall Quay, Dublin 1 (trading as IOB) ('IOB', 'we', 'us', 'our') in connection with the capture of personal data on this form and the steps taken by IOB to respect your privacy.

IOB is a Data Controller and is committed to protecting your rights and any personal information which you provide to IOB will be treated with the highest standards of security and confidentiality, in accordance with Irish and European Data Protection legislation.

The privacy notice explains the following:

- What information do we collect about you?
- The purpose for collecting your personal data
- The legal bases for collecting your personal data
- Are you required to provide the information?

- How we store and secure personal data
- Details of third parties with whom we share personal data
- What are your rights?
- Contact

### **What information do we collect about you?**

The data we collect from you will be used by IOB only in accordance with the purposes outlined in this privacy notice. We will collect your data in the following manner:

Some of the information collected through this form may be classified as special category or sensitive personal data e.g. health data.

In order to provide our services to you we collect contact details, other identifying information and information regarding the reason for your pro rata request together with supporting documentation where relevant or employer signature and employer information when you fill out this application form.

The data collected in this form will be used by the CPD and other relevant departments in IOB on a 'need to know' basis.

### **The purpose for collecting your data**

The data we collect about you will be used to assess and apply a pro rata reduction in CPD hours where relevant and to assess and manage your CPD compliance where relevant. We will also use your data to communicate our decision to you and deal with any queries where relevant.

### **The legal basis for collecting your data**

We process your personal data on the following legal bases:

- We rely on your explicit consent as our legal basis for processing data provided on this form.
- The processing of your information is necessary for the performance of the designation/CPD membership contract between IOB and you.
- The processing is necessary for the purposes of our legitimate interests or the legitimate interests of a third party to whom we provide your personal data. We will not process your personal data for these purposes if our or the third party's legitimate interests should be overridden by your own interests or fundamental rights and freedoms. The legitimate interests pursued in this regard consist of:
  - conducting our business in a meaningful and lawful manner;
  - dealing with any disputes that may arise;
  - providing information relating to you to your employer, where they have a legitimate interest in obtaining that information.
- The processing is necessary for compliance with our legal obligations.

### **Are you required to provide the information?**

We require you to complete the mandatory fields identified in this form for the purposes outlined above. If you do not provide us with the information required in these fields, we may be unable to process this request for a pro rata reduction in CPD hours.

### **How we store and secure your data**

Any data we collect from you will be stored confidentially and securely. IOB is committed to ensuring all accesses to, uses of, and processing of IOB data is performed in a secure manner.

In addition to the normal standards of confidentiality, we also carefully control access to sensitive data e.g. health data within IOB so that it is only available to people who 'need to know'.

In keeping with the data protection principles, we will only store your data for as long as is necessary to provide our services to you and for such a period of time after this as is necessary to comply with our obligations under applicable law and, if relevant, to deal with any claim or dispute that may arise in connection with our relationship with you.

For the purposes described here we will store your data for three years for evidential and operational purposes for our CPD schemes (any supporting documentation which may contain sensitive information e.g. health data will be stored for a period in order to assess pro rata eligibility and duration and it will then be confidentially destroyed).

When we store your personal data on our systems the data will be stored either on IOB'S secure IT platforms within the EEA which are also subject to European data protection requirements.

### Details of third parties with whom we share personal data

IOB will share your data with third parties where necessary for purposes of the processing outlined here. We may share your information with our trusted service providers (e.g. IT support, auditors, legal advisors, and other professional advisors).

We may disclose your information to your employer or the Central Bank of Ireland e.g. for Minimum Competency Code/Regulation and/or Fitness and Probity requirements.

If you are a member of Compliance Institute we may disclose your information to Compliance Institute. We may disclose your information to the Insolvency Service of Ireland if you are a Personal Insolvency Practitioner (PIP).

We may also disclose your information to other legal and regulatory bodies where requested or where required by law.

### What are your rights?

You have the following rights, in certain circumstances and subject to applicable exemptions:

- You are entitled to ask for a copy of the personal data, which IOB holds about you.
- The right to have any inaccuracies in your personal data amended.
- The right to object to the processing of your personal data.
- The right to have the personal data that we hold about you erased.
- The right to restrict the processing of your personal data.
- The right to receive your personal data, which you provided to us, in a structured, commonly used and machine-readable format or to require us to transmit that data to another controller.
- Where processing is based on consent, you have the right to withdraw your consent at any time

### Contact

If you have any queries relating to the processing of your personal data for the purposes outlined above or you wish to make a request in relation to your rights you can contact IOB's Data Protection Officer using the contact details below.

If you are unhappy with the way in which your personal data has been processed, you may in the first instance contact IOB's Data Protection Officer using the contact details below.

IOB has a Data Protection Officer who can be contacted through [dataprotection@iob.ie](mailto:dataprotection@iob.ie) or by writing to: The Data Protection Officer, IOB, 1 North Wall Quay, Dublin 1.

If you remain dissatisfied then you have the right to apply directly to the Data Protection Commission for a decision. The Data Protection Commission can be contacted at:

Data Protection Commission, 21 Fitzwilliam South, Dublin 2, D02 RD28, [dataprotection.ie](http://dataprotection.ie)

## Declaration

I wish to apply for pro-rata adjustment of my CPD requirements. I acknowledge that I have read in full, understood and agree to be bound by the terms and conditions set out and referred to online at <https://iob.ie/info/cpd#guidelines-and-regulations>.

I confirm that the above is accurate and correct and that if I am on an MCC CPD scheme and on statutory/sick leave for more than 12 months I will read the CPD Annual Update Manuals for the absent year(s).

Member signature \_\_\_\_\_

Date

--	--	--	--

Manager's name \_\_\_\_\_

Manager signature

\_\_\_\_\_

Please email this form to [cpdapplications@iob.ie](mailto:cpdapplications@iob.ie)