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**Occupational Therapists Board**

**Manual for  
Continuing Professional Development (CPD) Scheme  
for Registered Occupational Therapists**

**July 2023**

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**Education Committee  
Occupational Therapists Board  
Hong Kong**

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## **1 Introduction**

- 1.1. Work in the field of healthcare is influenced continually by various factors such as changes in demographics and societal needs, advances in science and technology and reorganization of resources, etc. Continuing professional development (CPD) is fundamental for enabling the occupational therapists to meet the changing requirement and ensuring their professional competencies are relevant to the practice nowadays through the ongoing enhancement of their professional skills and knowledge.
- 1.2. CPD refers to any post-registration updating of education, skills or experience which are occupational therapy- or healthcare- related, with an aim to enrich the occupational therapists' contribution in quality healthcare and help them in their pursuit of professional goals.
- 1.3. As a statutory body established under the Allied Health Professions Ordinance, Cap. 359, Laws of Hong Kong, to regulate and promote the standard of practice for the profession of occupational therapists in Hong Kong, the Occupational Therapists Board (OT Board) plans to introduce a CPD Scheme for occupational therapists to encourage members of the profession to keep abreast of the latest development in the profession and enhance professional knowledge and skills through ongoing participation in professional development activities.
- 1.4. The CPD scheme has been running on a voluntary basis since 2006. Keeping in mind that mandatory participation in CPD scheme is a long-term goal in enhancing standard and credibility of registrants and in the light of experience gained in past years, the OT Board considers it an opportune time to implement a mandatory scheme. The mandatory CPD scheme is launched on 1 July 2023.

## **2 The CPD Scheme**

### ***2.1 CPD cycle & CPD credit point requirement***

- 2.1.1 The CPD cycle shall span 3 years, commencing from 1 July of the first year and ending on 30 June of the fourth year.
- 2.1.2 During the 3-year CPD cycle, a registered occupational therapist will have to attain 45 credit points through participation in recognized CPD programs/ activities. When an occupational therapist is registered after the commencement of the prevailing CPD cycle, the CPD credit point requirement will be determined on a pro-rata basis from the date of admission to the register as specified in the Certificate of Registration to the end of the prevailing CPD cycle. There is no minimum yearly CPD credit point requirement but registrants are recommended to target at 15 CPD credit points for each year.
- 2.1.3 Registrants are strongly encouraged to develop their CPD plans early to obtain maximum advantage from the scheme. They should-
  - identify their own strengths, weakness and areas for further development;
  - obtain feedback from peers and/ or supervisors;
  - identify learning activities for self improvement and ensure the objectives can be reasonably accomplished;
  - actualize the identified CPD activities;
  - evaluate the actions taken; and
  - keep their own record of CPD activities.

## **2.2 CPD activities & CPD credit point allocation**

### **2.2.1 Categories of CPD activities**

#### **2.2.1.1 There are six categories of CPD activities -**

- Award bearing courses
- Accredited programs
- Publications
- Participation in study group
- Self-study
- Educational activities

#### **2.2.1.2 Award Bearing Courses**

- Leading to the award of tertiary qualifications, e.g. doctorate, master, diploma or certificate course by a recognized academic institute, and fit the following criteria-
  - \* Related to the current professional role of the occupational therapist or directly related to the delivery of occupational therapy services
  - \* Formal assessment for confirming “PASS” or “FAIL” either continuously or at the end of the course
  - \* Of not less than 45 contact hours
- Instead of allocating CPD credit points upon completion of the whole program, they would be awarded in each cycle. Individual modules of the program would be separately counted for the award of the CPD credit points.

#### **2.2.1.3 Accredited Programs**

- An accredited program should-
  - \* Have a theme relevant to Occupational Therapy or Broad Professional aspects
    - **Occupational Therapy relevant (OT relevant)** – courses (excluding award-bearing courses), conferences, seminars, workshops and symposia, etc. that focus on knowledge, skills or techniques that facilitate and contribute to the delivery of OT services. The knowledge, skills or technique should already have a demonstrated utilization in OT in local or overseas context with either literature support or documentary proof in journals, newsletters, seminar sharing and case illustrations / demonstrations;
    - **Broad Professional relevant (BP relevant)** – courses (excluding award-bearing courses), conferences, seminars, workshops and symposia, etc. that focus on knowledge, skills or techniques that may be applicable across a wide spectrum of professionals including occupational therapists.
  - \* Be accredited by the OT Board or organized by Accredited Program Providers
  - \* Have been formally announced (with structured program run-down) to members of the profession and have proper registration procedures

- \* Have invitation letters issued to speakers or presenters and attendance certificates to audience participants
- \* Have a duration of an hour or more

#### 2.2.1.4 Publications

- Indexed Journals: listed in the Science Citation Index (SCI) or the Social Science Citation Index (SSCI)
- Peer-review OT relevant professional journals not indexed in SCI or SSCI
- Publications with ISBN numbers: books, manuals, practice guidelines, etc.
- Poster presentation or oral presentation or publications in proceedings at an Accredited Program or OT relevant overseas conferences or symposia
- *Other publications*: newspaper articles, films, video & multimedia productions, the content of which are occupational therapy related and are accessible to the public

#### 2.2.1.5 Participation in Study Group

- Include meetings such as in-service training, special interest group meetings under professional association, etc.
- Each study group meeting should-
  - \* Focus on a discussion topic related to Occupational Therapy or Broad Professional aspects
  - \* Last for an hour or more
  - \* Involve 3 or more participants and an attendance record should be kept
  - \* Keep a record of the written or electronic material used in the discussion

#### 2.2.1.6 Self-Study

- Review of information from a journal, a book, an online source, etc. relevant to Occupational Therapy or Broad Professional aspects. Registrants should provide a summary report of not less than 200 words illustrating how the information could be applied to occupational therapy practice.

#### 2.2.1.7 Educational Activities

- Being speaker/trainer, either lecturing, presenting, training or demonstrating techniques in programs other than accredited programs but not one of the following:
  - \* Facilitating clinical visits
  - \* Performing clinical orientations
  - \* Being part and parcel of the core duties of an OT

## 2.2.2 CPD credit point allocation

Categories of CPD activities	Credit points for each activity
<b>1. Award Bearing Courses</b>	Equals to the number of contact hours <sup>^</sup>
<b>2. Accredited Programs *</b>	Equals to the number of hours <sup>^</sup> spent in lecturing or presenting multiplied by 4
Being speaker, either lecturing or presenting at OT or BP relevant accredited programs	
* Maximum of 24 CPD credit points for a whole day program lasting for six hours or more	
* Maximum of 72 CPD credit points for a single program lasting for three days or more	
Being audience participant	
(1) OT relevant	Equals to the number of contact hours <sup>^</sup>
(2) BP relevant	Equals to the number of contact hours <sup>^</sup> multiplied by 0.5
* For a whole day program lasting for 6 hours or more, the CPD credit point will be standardized at 6 for an OT relevant program and 3 for a BP relevant program	
* For a single program lasting for 3 days or more, the CPD credit point will be standardized at 18 for an OT relevant program and 9 for a BP relevant program	
<b>3. Publications</b>	
(1) Indexed journals	
• 1 <sup>st</sup> , 2 <sup>nd</sup> and corresponding author	30 for each author
• 3 <sup>rd</sup> and the following authors	Portion of 30 shared among the total number of the 3 <sup>rd</sup> & others <sup>#</sup>
(2) ISBN publications and non-indexed journals	10 for each author
(3) Poster presentation or oral presentation or publications in proceedings at an accredited program or OT relevant overseas	2 for each author
(4) Other publications	2 for each author

<p><b>4. Participation in Study Group *</b></p> <p>* Maximum of 15 CPD credit points per cycle (5 CPD credit points per year on average)</p>	<p>1 for each study group meeting</p>
<p><b>5. Self-Study *</b></p> <p>* Maximum of 15 CPD credit points per cycle (5 CPD credit points per year on average)</p>	<p>1 for each self-study report</p>
<p><b>6. Educational Activities *</b></p> <p>*Maximum of 9 CPD credit points per cycle (3 CPD credit points per year on average)</p>	<p>1 for each activity lasting for 1 hour or more</p>

^ 30 or less than 30 minutes would be rounded up to 0.5 hour in calculation, e.g. 15 minutes would be rounded up to 0.5 hour & 45 minutes would be round up to 1 hour.

# *In case there are ONLY three authors, the 3<sup>rd</sup> author will be granted HALF of the allocated CPD credit points, i.e. 15 credit points. All calculation would be rounded up to an integer.*

\* *Categories where the maximum credit points will be capped.*

2.2.3 Registrants may undertake CPD activities organized by Accredited Program Providers or accredited by the OT Board for the award of CPD credits. Accredited Program Providers are organizations recognized by the OT Board for organizing “Accredited Programs” eligible for the award of CPD credit points. A list of the Accredited Program Providers is posted on the website of the OT Board at [www.smp-council.org.hk/ot/en/content.php?page=cpd](http://www.smp-council.org.hk/ot/en/content.php?page=cpd). The OT Board also accredits other programs for the award of CPD credit points as submitted by non-accredited program providers or individual registrants. Please refer to the Manual for Accreditation of CPD Program for details of the submission of such an application.

2.2.4 Accreditation is not required for the CPD categories of “Award Bearing Courses”, “Publications”, “Participation in Study Group”, “Self-Study” and “Educational Activities”. The OT Board, however, has the discretion to decide whether to accept the activities for the award of CPD credit points.

2.2.5 Within the CPD cycle, repeated attendance of a CPD activity of the same topic as an attendee or a speaker and may be at the same level, for purposes such as update, recalibration, re-certification, etc. will be counted for extra CPD credit points within each year of the CPD cycle.

2.2.6 The OT Board has the full discretion on whether to award CPD credit points to an activity.

## 2.3 CPD Record Administration

- 2.3.1 All registrants are required to maintain their own records of participation in CPD activities in the approved self-declaration form at Appendix B. The form can be downloaded from the Board's website at [www.smp-council.org.hk/ot/en/content.php?page=cpd](http://www.smp-council.org.hk/ot/en/content.php?page=cpd). When applying for renewal of practising certificates in the 3rd year of the CPD cycle, registered occupational therapists will have to submit to the Board the declaration form providing the CPD activities participated and the credit points attained.
- 2.3.2 All registrants should keep relevant supporting documents as evidence of participation of CPD activities for at least 7 years.
- 2.3.3 Any incorrect or false declaration or failure to honour any undertaking made to the OT Board may lead to disciplinary proceedings.

## 2.4 Audit

- 2.4.1 The OT Board will conduct random audit from time to time to ensure compliance with the CPD requirement. When and as requested by the OT Board, registrants must produce the relevant supporting documents within the specified time.
- 2.4.2 The evidence for submission for various CPD activities are as follows-

CPD Activity	Evidence Submitted for Audit
Award Bearing Courses	Transcript from the institute Copy of the certificate of the award of qualification issued within the 3-year CPD cycle & no submission before
Accredited Programs	Audience participant: Original and copy of the certificate of attendance, course receipt, signed confirmation from convenor, etc. Speaker: Original and copy of letter of invitation which shows the title and duration of presentation
<b>Publications</b>	
(1) Indexed journals	Original and copy of the document showing acceptance for publication Full copy of the published article or document accepted for publication
(2) ISBN publications and non-indexed journals	The book may be required for submission Copies of the following pages of the publications: cover, table of contents (and the 1 <sup>st</sup> page of the respective chapter)
(3) Poster presentation or oral presentation or publications in proceedings at an accredited program or OT relevant overseas conferences	Original and copy of letter of invitation
(4) Other publications	Full copy of the article, publications or documentary may be required for submission

<b>CPD Activity</b>	<b>Evidence Submitted for Audit</b>
Participation in Study Group	Written or electronic material used in the study group meeting and relevant attendance record
Self-Study	Self-study report providing a summary of not less than 200 words illustrating how the information can be applied to occupational therapy practice
Educational Activities	Original and copy of evidence of invitation which shows the title and duration of the activity

## **2.5 Non-compliance with CPD requirement**

- 2.5.1 Under the mandatory CPD scheme, non-compliance with the CPD requirement for the 3-year CPD cycle will be referred to the OT board for consideration of disciplinary actions. When subsequently the relevant legislation has been amended, the Board will not issue practising certificate to registrants who fail to comply with CPD requirement.
- 2.5.2 Registrants who fail to comply with the CPD requirement may be granted a grace period to make up the shortfall in CPD requirements, which is normally within 12 months from the end of the CPD cycle concerned. The next cycle shall follow immediately after the previous cycle without any break, i.e. the registrants will have to undergo normal and remedial CPD at the same time. For registrants who have failed to make up the shortfall in CPD credits, the Board may initiate disciplinary action against them.
- 2.5.3 In addition, for registrants who have obtained less than two-thirds of the CPD requirements, a remark will be added to their annual practising certificates.
- 2.5.4 In case of prolonged illness or health problems, to be supported by documentary proof, the OT Board may exempt the registrants from complying with the full CPD requirement. The CPD requirement may be adjusted on a pro-rata basis. If there are other extenuating circumstances, registrants should apply to the OT Board. Each application will be considered on individual merits. Failure by the registrants to keep proper records of their CPD activities or to manage efficiently their CPD obligations are not normally regarded by the OT board as acceptable extenuating circumstances.

When an individual registrant who is not entering the system at the beginning of the cycle, the CPD is determined on a **pro-rata basis** (as in Table A) from the date of admission to the register (stated as in the Practising Certificate) to the end of the cycle.

Table A:

<b>Month of Calculation</b>	<b>No. of CPD points required for the year of registration</b>
1 July -15 July	<b>15</b>
16 July – 15 Aug	<b>14</b>
16 Aug – 15 Sept	<b>12</b>
16 Sept – 15 Oct	<b>11</b>
16 Oct -15 Nov	<b>10</b>
16 Nov – 15 Dec	<b>8</b>
16 Dec – 15 Jan	<b>7</b>
16 Jan – 15 Feb	<b>6</b>
16 Feb – 15 Mar	<b>4</b>
16 Mar – 15 April	<b>3</b>
16 April – 15 May	<b>2</b>
16 May -15 June	<b>1</b>
16 June – 30 June	<b>0</b>

- a. CPD point requirement is counted from 1<sup>st</sup> complete month of calculation, e.g. when an OT enters the system on 1 March 2024, CPD point requirement would be that for the month of 16 March to 15 April 2024, i.e. **3**.
- b. If the registrant enters the system with 6 months or less towards the end of the cycle (i.e. 16 December or after of the 3<sup>rd</sup> year), the CPD requirement of that period is waived.

Taking the CPD cycle 2023/24 to 2025/26 as example, the calculation is as follows:-

<b>CPD Credit Requirement</b> <b>Date of Registration</b>	<b>2023/24 (1<sup>st</sup> year of the cycle) (a)</b>	<b>2024/25 (2<sup>nd</sup> year of the cycle) (b)</b>	<b>2025/26 (3<sup>rd</sup> year of the cycle) (c)</b>	<b>CPD Requirement of the cycle (d) = (a) + (b)+(c)</b>
1 March 2024	3	15	15	<b>33</b>
1 March 2025	N.A.	3	15	<b>18</b>
1 March 2026	N.A.	N.A.	0 (note: less than 6 months towards end of cycle)	<b>0</b>

**CPD Scheme for Registered Occupational Therapists**  
**Record Form**  
**for the CPD cycle from 1 July \_\_\_\_\_(year) to 30 June \_\_\_\_\_(year)**

Categories of CPD activities	Description	Credit points for each activity	CPD credit points attained	
<b>1. Award Bearing Courses</b>	<ul style="list-style-type: none"> <li>● Leading to award of tertiary qualification, e.g. doctorate, master, diploma or certificate courses by a recognized academic institute, and fit the following criteria:               <ul style="list-style-type: none"> <li>➢ Related to the current professional role of the occupational therapist or directly related to the delivery of OT services</li> <li>➢ Formal assessment for confirming “PASS” or “FAIL” either continuously or at the end of the course</li> <li>➢ Of not less than 45 contact hours</li> </ul> </li> <li>● Instead of allocating CPD credit points upon completion of the whole program, they would be awarded in each cycle. Individual modules of the program would be separately counted for the award of the CPD credit points.</li> </ul>	<ul style="list-style-type: none"> <li>➢ Equals to the number of contact hours<sup>^</sup></li> </ul>		
<b>2. Accredited Programs @</b>	<p>An accredited program should:</p> <ul style="list-style-type: none"> <li>● Have a theme relevant to Occupational Therapy or Broad Professional aspects               <ul style="list-style-type: none"> <li>➢ <b>Occupational Therapy relevant (OT relevant)</b> – courses (excluding award-bearing courses), conferences, seminars, workshops and symposia, etc. that focus on knowledge, skills or techniques that facilitate and contribute to the delivery of OT services. The knowledge, skills or technique should already have a demonstrated utilization in OT in local or overseas context with either literature support or documentary proof in journals, newsletters, seminar sharing and case illustrations / demonstrations;</li> <li>➢ <b>Broad Professional relevant (BP relevant)</b> – courses (excluding award-bearing courses), conferences, seminars, workshops and symposia, etc. that focus on knowledge, skills or techniques that may be applicable across a wide spectrum of professionals including occupational therapists.</li> </ul> </li> <li>● Be accredited by the Occupational Therapists Board or organized by Accredited Program Providers</li> <li>● Have been formally announced (with structured program run-down) to members of the profession and have proper registration procedures</li> <li>● Have invitation letter issued to speakers or presenters and attendance certificates to audience participants</li> <li>● Have a duration of an hour or more</li> </ul>	<ul style="list-style-type: none"> <li>● Being speaker, either lecturing or presenting at OT or BP relevant accredited programs               <ul style="list-style-type: none"> <li>➢ Equals to the number of hours<sup>^</sup> spent in lecturing or presenting multiplied by <math>\frac{4}{3}</math> <ul style="list-style-type: none"> <li>- Maximum of 24 CPD credit points for a whole day program lasting for six hours or more</li> <li>- Maximum of 72 CPD credit points for a single program lasting for three days or more</li> </ul> </li> </ul> </li> <li>● Being audience participant               <ul style="list-style-type: none"> <li>➢ <b>OT relevant</b> <ul style="list-style-type: none"> <li>- Equals to the number of contact hours<sup>^</sup></li> </ul> </li> <li>➢ <b>BP relevant</b> <ul style="list-style-type: none"> <li>- Equals to the number of contact hours<sup>^</sup> multiplied by <u>0.5</u></li> </ul> </li> </ul> </li> </ul> <p>* For a whole day program lasting for 6 hours or more, the CPD credit points will be standardized at 6 for an OT relevant program and 3 for a BP relevant program</p> <p>* For a single program lasting for 3 days or more, the CPD credit points will be standardized at 18 for an OT relevant program and 9 for a BP relevant program</p>	<b>Program code</b>	<b>CPD credit points attained</b>
<b>3. Publications</b>	<ul style="list-style-type: none"> <li>● Indexed Journals: listed in the Science Citation Index (SCI) or the Social Science Citation Index (SSCI)</li> <li>● Peer-review OT relevant professional journals not indexed in SCI or SSCI</li> <li>● Publications with ISBN numbers: books, manuals, practice guidelines, etc.</li> <li>● Poster presentation or oral presentation or publications in proceedings at an Accredited Program or OT relevant overseas conferences or symposia</li> <li>● Other publications: newspaper articles, films, video &amp; multimedia productions, the content of which are OT related and are accessible to the public</li> </ul>	<ul style="list-style-type: none"> <li>● Indexed journals               <ul style="list-style-type: none"> <li>➢ 1<sup>st</sup>, 2<sup>nd</sup> and corresponding author : 30 for each author</li> <li>➢ 3<sup>rd</sup> and the following authors : Portion of 30 shared among the total number of the 3<sup>rd</sup> &amp; others<sup>#</sup></li> </ul> </li> <li>● ISBN publications and non-indexed journals : 10 for each author</li> <li>● Poster presentation or oral presentation or publications in proceedings at an accredited program or OT relevant overseas conferences or symposia : 2 for each author</li> <li>● Other publications : 2 for each author</li> </ul>		

<b>4. Participation in Study Group @</b>	<ul style="list-style-type: none"> <li>• Include meetings such as in-service training, special interest group meetings under professional association, etc.</li> <li>• Each study group meeting should: <ul style="list-style-type: none"> <li>➢ Focus on a discussion topic related to OT or Broad Professional aspects</li> <li>➢ Last for an hour or more</li> <li>➢ Involve 3 or more participants and an attendance record should be kept</li> <li>➢ Keep a record of the written or electronic material used in the discussion</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• 1 for each study group meeting</li> <li>• Maximum of 15 CPD credit points per cycle (5 CPD credit points per year on average)</li> </ul>	
<b>5. Self-Study @</b>	Review of information from a journal, a book, an online source, etc. relevant to OT or Broad Professional aspects. Registrants should provide a summary report of not less than 200 words illustrating how the information could be applied to OT practice.	<ul style="list-style-type: none"> <li>• 1 for each self-study report</li> <li>• Maximum of 15 CPD credit points per cycle (5 CPD credit points per year on average)</li> </ul>	
<b>6. Educational Activities @</b>	Being speaker/trainer, either lecturing, presenting, training or demonstrating techniques in programs other than accredited programs but <u>not one</u> of the following: <ul style="list-style-type: none"> <li>• Facilitating clinical visits</li> <li>• Performing clinical orientations</li> <li>• Being part and parcel of the core duties of an OT</li> </ul>	<ul style="list-style-type: none"> <li>• 1 for each activity lasting for 1 hour or more</li> <li>• Maximum of 9 CPD credit points per cycle (3 CPD credit points per year on average)</li> </ul>	
<b>Total CPD Credit Points attained:</b>			

**Legend**

^ 30 or less than 30 minutes would be rounded up to 0.5 hour in calculation, e.g. 15 minutes would be rounded up to 0.5 hour & 45 minutes would be rounded up to 1 hour.

# In case there are ONLY three authors, the 3<sup>rd</sup> author will be granted HALF of the allocated CPD credit points, i.e. 15 credit points. All calculation would be rounded up to an integer.

@ Categories where the maximum credit points will be capped.

<b>CPD Credit Point Requirement in the CPD Cycle :</b>
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I confirm that I **\*have / have not** fulfilled the CPD requirement in the CPD cycle.

Name: \_\_\_\_\_ Registration No. \_\_\_\_\_  
(Surname first, in block letters)

Tel No. \_\_\_\_\_ Employment background : \*HA / NGO / Private practice / Academic / Others: \_\_\_\_\_

Signature : \_\_\_\_\_ Date of submission : \_\_\_\_\_

\* Please delete where inappropriate