



Chartered
Institute of
Taxation.

Sample CPD Records

Other Skills or Competencies
(skills or learning expected in most members
working roles)

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Skills or learning expected in most members working roles.

Extracts using the CIOT CPD Form:

Planning - what do you need to do?	Action	Outcome	Time
CPD goals/learning needs/training gaps	CPD undertaken	Learning outcomes and reflection	Hours
<p>Learning needs - improve excel skills.</p> <p>I already use excel on a day-to-day basis and improvement could be made on the current files that I use. Advance excel courses including pivot table and macros will help meet these needs.</p>	<p>Excel Mastering Formulas and Functions [07.202X]</p> <p>Excel Pivot Table Specialist [09.202X]</p> <p>Excel Working with Macros [12.202X]</p>	<p>I learned new excel formulas and functions including shortcuts. I also learned to use pivot tables and macros. I have made several updates on the excel files that I work on improving my work efficiency.</p> <p>Follow up identified - some advance Macros training next year.</p>	<p>6 hrs each</p> <p>Total 18 hrs</p>
<p>Learning needs - IT awareness</p> <p>To improve by understanding how hackers may try to obtain company data and what can be done to prevent it.</p>	<p>Information Security Awareness course [13.05.202X].</p>	<p>Learning is being applied directly at my work every day such as - am now more aware of emails received from unknown sources, am more careful while sending emails with attachments.</p>	<p>0.5 hrs</p>

Planning - what do you need to do?	Action	Outcome	Time
CPD goals/learning needs / training gaps	CPD undertaken – Activities and dates.	Learning outcomes and reflection	Hours
Obtain and learn how to use chosen software – Sage in preparation for MTD:	20/XX/2X Sage demos of MTD software: <ul style="list-style-type: none"> • Auto entry • 5 step journey – 3 tiers of software 17/XX/2X – Sage training videos	Look at what Sage MTD software can do and access if suitable for my clients – looking at the different options available. Various Sage/Auto Entry videos to work out how to set up the new software.	3 hrs
I wish to recruit a new tax manager to advise on inheritance tax. I need to update myself on employment law around staff selection.	8./01/2X – Managing employees within the law. <ul style="list-style-type: none"> • online module. 	Learned about legal requirements re interviewing, assessing applicants, selection criteria and interview scoring or rating.	2.5 hrs
Essential training updates required every 2 years through my employer.	Essential training – online modules completed for Equality, Diversity & Inclusion, Data protection, Prevent Duty & Safeguarding (October 202X).	The core training modules are required to be updated every 2 years. Completed now until 202X.	5 hrs
Need to understand functionality of Gen AI tools where they to be used by internal staff and how we need to be aware of impact on accounts when being used by audit clients.	4 Inhouse AI Modules and presentations. Periodically throughout the year – March June Sept and Nov	Obtained a basic understanding of the functionality of Gen AI and also reminded of professional standards involved.	4 hrs

Extracts using alternative recording format:

Date	Title / CPD	Activity type	Reflection / Learning Outcome	Hours
11/01/202X	The Art of Negotiation	Internal training session on negotiation techniques.	Helpful for external service provider discussions and internal staff meetings.	0.5 hrs
07/06/202X	LMDP - Insights Discovery Module	Module in advance of Line Manager Development Programme covering Perceptions and Colour Energies (Insights Profile Evaluator).	Understanding and managing staff, improving working relations.	0.5 hrs
18/06/202X	LMDP - Session 2	Meaningful communication - relationships, Johari window (open self, blind self, hidden self, unknown self).	Personal development and understanding awareness skills/theory to support my roles as line manager.	2 hrs

Date	Title / CPD	Activity type	Reflection / Learning Outcome	Hours
16/01/202X	Data Masterclass for Senior Leaders	General CPD - Procedural	Managing vast amount of information in line with requirements.	10 hrs
16/05/202X	Data Protection	General CPD - Procedural	Being aware of data security in the firm and how to avoid cybersecurity attacks.	1 hr
Quarterly	Xero software accounting updates	Technical CPD - Structured	Ensuring I'm up to date with the accounting software we use.	3.5 hrs



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