

Step by Step Instructions - Chapter CPD Roster Online

****You may want to save these instructions for future reference.****

1. Go to the CPCU Society's website – www.cpcusociety.org

2. Log in

Username = your last name plus the last 3 digits of your member id #

Password = your year of designation/your member id #

3. Find Chapter Reports

a. Click on “Update Your Member Contact Information” Quick Link on the left side of your screen. Find and click on “Reports” link on the left.

b. Go to the “Chapters” tab then to “Chapter Reports” then click on the “Go to Online Reports” link.

4. Click on “Chapters” type of reports

5. Click on “Chapter Rosters CPD”

6. At each of the prompts use the drop down box to make your selections.

Select your chapter from the drop down box.

Chapter Code:

Leave Paid/Unpaid as is.

Paid/Unpaid:

Leave Member type include as is.

Member type include:
Affiliate (Int'l)
Candidate
Int'l Affiliate

Leave Member type exclude as is.

Member type exclude:
Candidate
Int'l Affiliate
Lapsed

Leave Year of designation as is.

Year of designation:

Leave Month as is.

Month:

Leave Report type as is.

Report type:

Click get report button.

7. Click the “Download file now” link.
8. Your Chapter’s CPD Roster will appear and you can now save or print the roster.

If you have difficulty running a report or need additional information, please contact the CPCU Society’s Member Resource Center at (800) 932-2728, option 4 or membercenter@cpcusociety.org.