

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. Click on “Update Your Member Contact Information” Quick Link on the left side of your screen.

3a. Or if you are already logged in you can go to the “Chapters” tab then to “Chapter Reports” (7th option down) then click on the “Go to Online Reports” link.

4. Click on “Reports” – should be the 4th option down the list

5. Click on “Chapters” type of reports

6. Click on “Chapter Rosters CPD” – should be the 5th report down the list

7. 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:

Check off this box only if you want report emailed to yourself.

In addition, please email me a copy of the report

Click get report button.

8. Next you'll be sent to a link to "Download file now".
9. 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.