



Submitting CPE Requests For Fast Approval

August 2017



HEADQUARTERS STAFF

For the purposes of CPE, email
CPE@AFWA.org to reach all staff.

- YOLANDA KENNISON
 - CPE review and approvals
- DEBI WILLIAMS
 - Program promotion
- ERICKA HARNEY
 - NASBA sponsorship licensing



CPE Registry

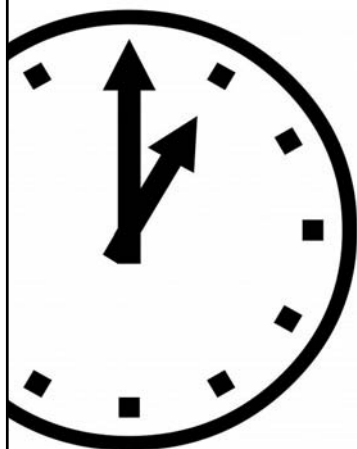
- AFWA pays \$4,200 annually to be a registered sponsor of CPE with NASBA
 - Includes group-live and internet-based
 - All submission requirements are NASBA specified
- Also a registered provider with IMA's CMA program



*IMA's Certification for
Accountants and
Financial Professionals
in Business*



The Clock is Ticking...



CPE Packets are due to AFWA Headquarters
within 30 days of your program!

NASBA's programming year runs
November – October.

All requests for the current year
are due to AFWA Headquarters by **September 30!**



By September 30:

- All CPE information for events held November 1, 2016 – September 30, 2017 must be submitted
- A CPE request form must be submitted for any event planned for October 2017.



Moving on...



Materials

- All forms and materials discussed today are available in the AFWA Members Portal > Programming Toolkit
- A recording of this webinar will be posted
- Additional CPE FAQ's are available
- NASBA Fields of Study



Checklist & Request

- CPE Request for Credit Checklist
 - Your guide for preparing all the required materials
 - This form does not need to be submitted with your request
- Request for CPE Credit Form
 - Includes all the general information about your event, must be signed by the President or CPE Chair
 - Required Instructor information
 - Single Program or Multi-Program forms

NASBA STATEMENT OF STANDARDS: S24-01 Required documentation elements

- Author/instructor, author/developer, and reviewer, as applicable, names and credentials. For the CPA and tax attorney acting as an author/instructor, author/developer, and reviewer for **accounting, auditing, or tax** program(s), the state licensure, license number and status of license should be maintained. For the enrolled agent acting in such capacity for tax program(s), information regarding the enrolled agent should be maintained.



Promotional Materials

- How did you get the word out about your event?
 - Screenshot of event page on website or Facebook
 - Copy of email or newsletter
- Template available to ensure you include all the required information:

Program Title	Objectives and Content
Program Level	Prerequisites
Preparation	Delivery Method
Recommended CPE	Program Date
Administrative Policy	NASBA Registry Statement

Updated your NASBA
Registry website:
www.nasbaregistry.org



NASBA Program Levels

- **Basic** - most beneficial to CPAs new to a skill or an attribute. These individuals are often at the staff or entry level in organizations.
- **Intermediate** - builds on a basic program, most appropriate for CPAs with detailed knowledge in an area. Such persons are often at a mid-level within the organization, with operational and/or supervisory responsibilities.
- **Advanced** - most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications. Advanced level programs are often appropriate for seasoned professionals within organizations
- **Overview** - provides a general review of a subject area from a broad perspective.
- **Update** - provides a general review of new developments. This level is for participants with a background in the subject area who desire to keep current.



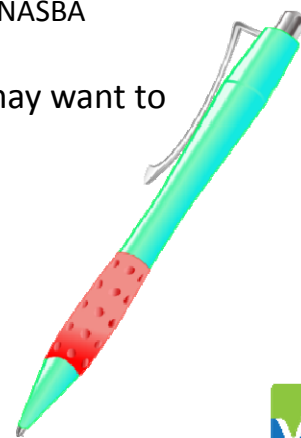
Speaker Information

- **Speaker Bio**
 - May be included in promotional materials
 - If the speaker doesn't provide directly, check for a website or LinkedIn profile
- **Timed Outline**
 - Detail the topics covered in the presentation
 - Ask the speaker to provide
 - 50 minutes of content + 10 minutes introduction and Q&A
 - **Required Elements of Engagement:** "A group live program must include at least one element of engagement related to course content during each credit of CPE." (Ex. *Group discussion, polling questions, instructor-posed question*)
 - Ask your presenter to prepare a discussion question for the group
 - Note the Element of Engagement with the Timed Program Outline



Attendee Sign-In

- Attendee Sign-in
 - All attendees must sign in, an RSVP list does not meet the NASBA requirements
- If sending Certificates or Surveys electronically, you may want to collect email addresses on the sign-in form



Session Handouts

- Such as...
 - Power Point slides
 - Flyer, brochure, or booklet from the speaker
- If no handouts are presented, you must submit the Session Handouts form available on the Members Portal
 - A signed statement saying handouts were not used



Program Evaluation

- Use the template provided to ensure all the required questions are asked
- Provide a summary of responses
- Survey Monkey
 - eSurveys may be used, however be sure you are still collecting feedback from all attendees.
 - Consider providing feedback to your speaker and always review for your own planning



Program Evaluations

- BONUS TIP: Use this opportunity to ask other questions of your attendees
 - Recommendations for future program topics or locations
 - Volunteer interest



Certificate of Completion

- Single and Multi-event templates available on the Members Portal
 - Your Chapter may design your own Certificate, but all NASBA required information must be included.
- Does not need to be signed by the attendee, must be signed by the President or CPE Chair
- May be distributed to attendees at the program or following via email
- As long as a complete sign-in sheet is provided only one Certificate needs to be submitted
 - Leave the attendee line blank



Most Common Send Backs

- Missing Documentation
 - Handouts
 - Promotional Material
 - Timed Outline
- Wrong Field of Study



Retention – 5 years

- List of program attendees
 - Date and location of program
 - Names of instructors or speakers
 - Copies of completed program evaluations
 - Amount of recommended CPE
-
- Consider a Dropbox for your Chapter



A FEW MORE IDEAS...

Just for you!

Webinars for Programming

- AFWA National offers free CPE through monthly professional development webinars
- Host an event to participate in the live webinar as a group
- Webinar recordings are available via the Members Portal and may be used for Chapter Programming
 - Program must have a facilitator who has watched the webinar in advance and is familiar with the material
 - CPE Packets should be submitted as usual with name of facilitator included



Making it easier

- Share the responsibility with Co-Chairs
 - Split up the month's of the year
 - Split responsibilities: planning and paperwork
- Go paperless
- Minimum standards
 - Plan what is best for your Chapter and Volunteer abilities
- Helpful Handouts: Promoting Programs, Chapter Programming, Chapter Calendar



A Few Challenges...

- Host advanced and intermediate CPE events
- Review your registration costs
 - Member vs Non Member
- Survey your members about programming
 - What time works best for you to attend CPE events: morning, noon, evening
 - Recommendations for: topics, location, 'fun' events
 - How often would you like to participate in CPE events
 - Do you need CPE? If no, what type of sessions are valuable to you



Questions?

Contact CPE@AFWA.org or Yolanda.Kennison@AFWA.org







Women Who Count
2017 NATIONAL CONFERENCE
 Presented by The Accounting & Financial Women's Alliance

OCTOBER 28-30 | WASHINGTON, D.C.

AFWA DAY

October 28, 2017

Programming for current and aspiring AFWA Chapter Leaders

WOMENWHOCOUNT.COM

Early Bird Discounts thru August 16

Connect with AFWA

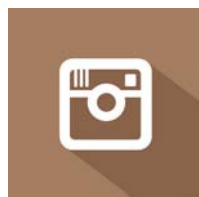
anytime at AFWA.org on these social sites



/AFWAnational



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Page/Group

