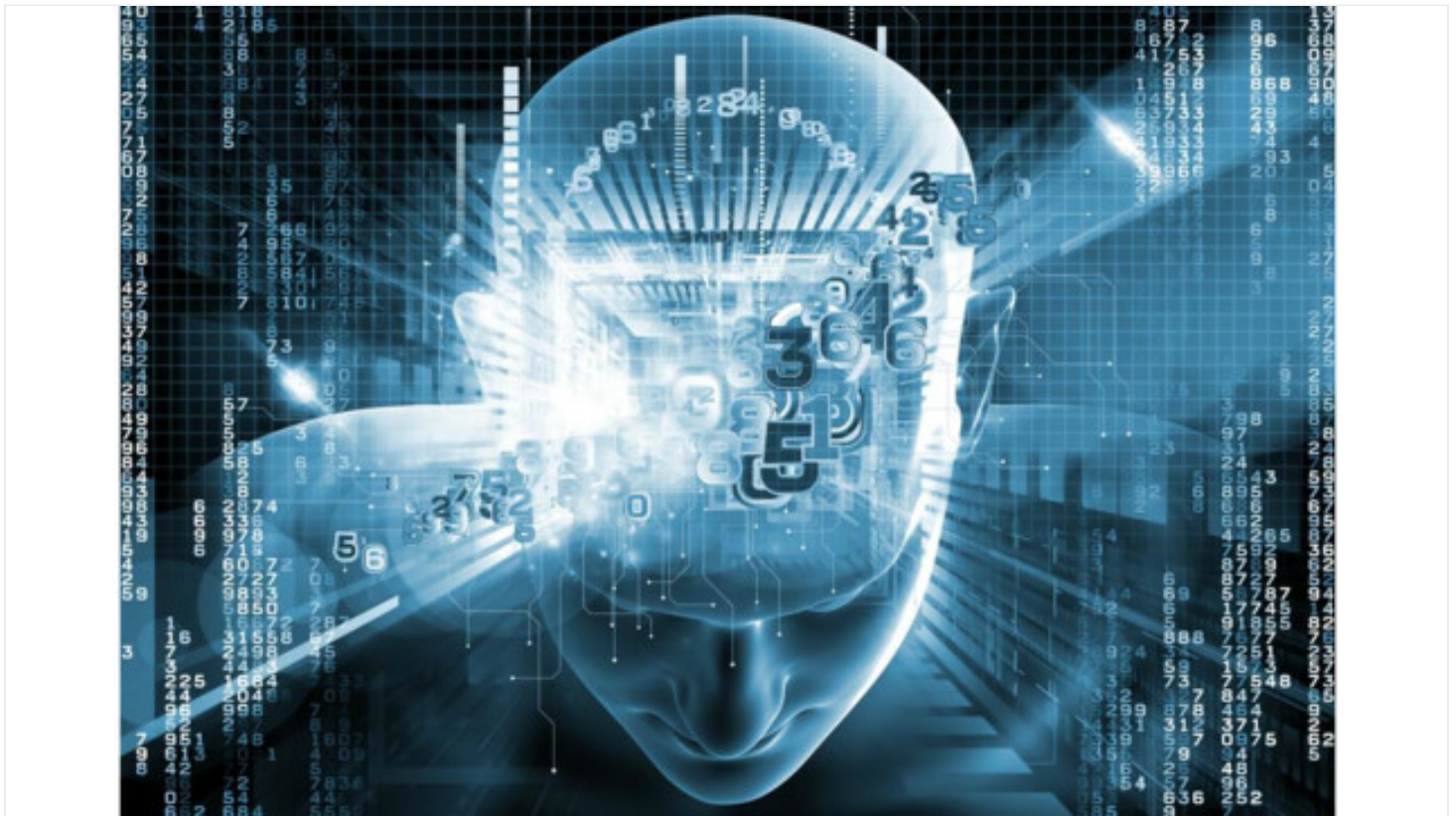


Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

require biannual or triannual reporting, making it even more important that CPE course documentation be managed properly. While there are some HR application that can ...

**Mary Girsch-Bock** • Nov. 10, 2021



Choosing the CPE courses that you wish to take annually is important. But what happens after you take those courses?

It may be easy to track credits that are reported in the same year, but many states require biannual or triannual reporting, making it even more important that CPE course documentation be managed properly. While there are some HR application that can track continuing education credits, they may not be able to track all of the details for accurate reporting.

To start out on the right track, be sure to keep the following documentation from any

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- **Official grade report or official transcript:** If you've completed CPE courses at an accredited university, you'll need to provide the transcript. If the course is a non-credit or continuing education course, you'll need to obtain a statement of completion from the instructor or a certificate of completion.
- **Original sponsor signed statement:** If you attend a program provided by a CPE sponsor, you'll need to have a sponsor signed statement for instruction credit.
- **Book or original publication:** If you've earned CPE credits by writing and publishing an article or writing a book, you'll need to have a copy of the original publication handy.
- **Course Development Details:** If you've presented at a conference, held a webinar or conference of your own, or taught a class, you'll need to retain the documentation from each course taught.

Don't just discard these items after a few years. NASBA currently recommends that you retain all CPE related documents for a minimum of five years.

## What to do with all of that documentation

Keeping track of every CPE class you've attended, every article you've written, or every webinar you've sat in on can quickly get overwhelming if you don't have a system in place. If you're not tracking details in the cloud, you can scan the documents and store them electronically as well as in a file just to ensure that everything will be in order when the time comes to provide the details to your state accounting board.

Another option is to use a CPE tracking program such as MyCPE Manager, from the AICPA, a cloud-based tool that tracks jurisdictional requirements and helps track all completed courses. that will help you manage all of your courses, certificates, and credits in one application. Checkpoint Learning from Thomson Reuters also helps

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

- Location
- Type of program (onsite, online, webinar, etc.)
- Number of CPE hours earned

Dedicate a single place in your office to store all CPE related documents. With all of the paperwork typically found in a CPAs office, it's easy to misplace a certificate or proof of attendance. Having a dedicated location for all CPE information will allow you to easily find the appropriate paperwork when it's time to report CPE hours earned.

Whether you choose to track CPE credit hours manually, store information in the cloud, or use a third-party application, as a professional, it's important to have a system in place that will allow you to easily report credits when required.

While we're on the topic, you can register for *CPA Practice Advisor's* free online CPE conference, **Ensuring Success**, at [www.ensuringsuccess.com](http://www.ensuringsuccess.com). Professionals can earn up to 14 hours during two days, choosing the courses and times they want. There is absolutely no cost for attendees.

Accounting • Firm Management

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

