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Signing on to the System

- Access the website at http://[state abbreviation].CPEtracking.com or http://[state name].CPEtracking.com.

- Type your license number in the License Number field.
- Type in your assigned password in the Password field.
  - Depending on your state this could be a state issued password, such as a PIN number, or other provided password.
- Click the Login button to access the system.
- If your account does not have a valid email address associated with it, then you will be prompted to provide an email address:
Type a valid email address in the New Email Address field.
Type the same email address in the Confirm Email Address field.
Click Undo Changes to clear the contents of the fields.
Click Change Email to save the entered email address.

**Forgot Password**

- If you have forgotten your State Board issued password, you must contact your State Board of Accountancy. Only the State Board can retrieve your password. If you have ever reset your password to something different than your state issued password, but cannot recall your password, you can use the Forgot your password? feature by clicking the Forgot your password? link underneath the login box.

**Forgot your password?**

- Enter your state **license number** in the field provided.
- Enter your **email address** in the field provided.
  - Click Back to return to the login screen.
  - Click Next to process the information.
- If either the license number or the email address cannot be validated, you will need to contact NASBA for assistance at CPetracking@nasba.org.
- If both pieces of information can be validated, you will receive a confirmation email to the address specified.
  - Click on the link provided in the email to change your password.
First Time Login for States that allow Home State Exemption

You will only see the following information if your state allows non-resident licensees to claim exemption from its CPE requirements by virtue of having met the CPE requirements in the most recent reporting period of your “home state” (state of residence or principal place of business).

If your state does not have home state exemption rules, you will be logged in to the My Profile tab view.

Once you successfully login for the first time, you will be prompted to indicate whether or not you are using “home state exemption" for the reporting period.

- Review the information presented.

<table>
<thead>
<tr>
<th>Home State Exemption</th>
</tr>
</thead>
<tbody>
<tr>
<td>If your state Accountancy Board rules allow you to meet their CPE requirements by virtue of meeting your CPE requirements for a CPA license held in another state (state of residence or principal place of business, for example) and you would like for your CPE compliance to be based on your home state’s requirements, select “Yes” to the question below. You will then be prompted to select the applicable state that you would like for the Board to review your CPE compliance. Once you have selected the state, click the Submit button. You will then be asked to enter the specific information needed for the jurisdiction selected.</td>
</tr>
</tbody>
</table>

If you are not claiming a home state exemption or are unsure if your state allows this type of exemption, simply select “No” to the question below and click Submit to proceed to entering your CPE records. Please refer to your state Board’s CPE rules and regulations for further clarification.

Will you be claiming home state exemption? If so, please click "yes" and indicate the state that is your home state. ☑ Yes ☐ No

NOTE: 1 credit events in your profile do not include any attachments. If you would like to correct this, please select the CPE Credits Reported tab.

- The question regarding whether or not you will use home state exemption is defaulted to a “No” response.
- If you do wish to use home state exemption, click the “Yes” radio button and select your home state from the dropdown provided.
Will you be claiming home state exemption? If so, please click "yes" and indicate the state that is your home state.  Yes  No

*Select a Jurisdiction

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Commonwealth of Northern Mariana Islands
- Connecticut
- Delaware
- District of Columbia
- Florida
- Georgia
- Guam
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas

NOTE: 1 credit can be claimed for each question answered correctly.
If you would like to use home state exemption, click the Submit button.
Proceed with entering your CPE credits for your home state reporting period.

- If you do not wish to use home state exemption, click the Submit button.
- Proceed with entering your CPE credits for the reporting period.

Logging out of the System

Regardless of the screen that you are working in, the link to logout appears at the top right of the screen.

To log out of the system:

- Click the logout link to return to the log in screen.
Navigating CPEtracking

Throughout CPEtracking, there are balloon-shaped callout icons that display. Clicking on these icons will provide additional information about the screen or field in view.

Links appear throughout CPEtracking screens. Clicking on these phrases or commands highlighted in green and underlined will allow you to perform additional functions on the screen you are currently viewing.

If you move your mouse over text that appears in blue and it changes from your mouse pointer to a hand tool, you can click on that text to send an email or to access external content, such as your board website. Clicking on an email address in blue will launch your default e-mail program and populate that e-mail address in the To: field of the new email message.
Where dates are required, the format is a two digit month and date with a four digit year (MM/DD/YYYY).

To designate information that is required, the field title is followed by a red asterisk (*).
Overview of Major Tabs

There are three major tabs that appear across the top of the CPEtracking system at all times. You can move between them by clicking on the tab name.

My Profile This tab is your default view and contains information about you such as your address, license date and license number. If the information is incorrect, you will need to contact the State Board to have the information changed. Your e-mail address and password can be edited from this screen.

Manage CPE Credits This tab allows you to add new credit, view/edit credits already entered, manage provider information and submit your CPE to the Board.

Help This tab allows you to view the user manual for CPEtracking.
My Profile

This page allows you to view your contact and license information (name, address, etc.) and to edit select information.

- Click the My Profile tab.

You can view your current login ID, e-mail address, name, address, phone/fax and license information.

Other than e-mail and password, you cannot edit your other personal information. Please contact the Board if any of this information needs to be changed using the links provided in the page.

The Review CPE Requirements directs you to the Board Rules and Regulations web page.

The two links to the right of your information allow you to make changes to either your password or your email address.

**Change Password**: Allows you to change your login password. You can only enter a new password. The system does not allow you to view the previous password.

- Click the change password link.
Type your new password in the **New Password** field.
Type the same new password in the **Confirm Password** field.
*NOTE: Passwords must be at least six characters long and at least one character must be non-alphabetic (numbers or symbols).*
The password will be masked as you type it.
Click **Undo Changes** to clear both fields.
Click **Change Password** to complete the change. The system will return to the My Profile screen.

**Change Email Address:** Allows you to edit or update the email address on record.
Click the [change email address](#) link.

Type your new email address in the **New Email Address** field.
Type the same new password in the **Confirm Email Address** field.
*NOTE: The system will not permit you to enter an e-mail address that is already in use.*
Click **Undo Changes** to clear both fields.
Click **Change Email** to complete the change. The system will return to the My Profile screen.

**Correct Other Information:** The information displayed is provided by your state board of accountancy. If any of your other profile details are incorrect, a link is provided above the [Review CPE Requirements](#) link to show contact information for your state board.
Click on the [board link](#) listed below the Board contact information to go to your state board's website.
CPE Credits Reported

If you wish to add credit, to view credit entered or to edit credit entered, this page allows you to search for credits taken within specific time frames or by program type. Additionally, you can download the results as a spreadsheet or in a .pdf file.

- Click the CPE Credits Reported tab
- OR
- Choose the CPE Credits Reported option under the Manage CPE Credits tab.

- The From Date field is defaulted to 1/1 of the first year of the previous three-year reporting cycle.
- The To Date field is defaulted to 12/31 of the current year.
- Credits within the date range are listed by program type and date order within each type. If there are not any credits entered in the date range, then the message “No CPE Credits have been reported for this date range” is displayed.
- Credits that you have entered will appear with the credit details link to the left. Clicking on the link will provide all course details that were entered when the course was created in the system.
- Credits that have been input to your transcript from a provider feed will appear with the attendance details link to the left.

For each credit entered, the following details are displayed:

- Course Number (if provided)
- Title or name of credit
- Start Date for the credit
- End Date for the credit
- Delivery Mode for the credit
- Provider
- Subject Areas
- Reported total number of credits
- Attachments? Indicates whether or not a document (such as a certificate of completion) has been added to the credit.
  - If a credit was input directly from a provider, this will show “Reported by Provider”.

**Search Credits:** Allows you to search for credits within differing date ranges or by a specific program type.

- Type in the desired beginning and ending dates in the From Date and To Date fields.
- If you wish to view only credits from a specific program type (i.e., self-study), select the program type from the drop down list next to the “Program” field.
- To view the results on screen, click the Run Report button.

**Export Details**

- To view the results in a spreadsheet format, click the box beside “Export Details” and click the Run Report button. This file can be saved on your local computer drive.

Open the file in the desired program.
This file can be saved on your local computer drive for reference.
Printable View

- To view the results in an Adobe PDF file, click the box beside “Printable view” and click the Run Report button. This file can be saved on your local computer drive.

Add New Credit: Allows you to enter new credit into your transcript.

- Click the Add New Credit link at the top left of the transcript display.
- OR
- Select Add New Credit from the Manage CPE Credits tab.
The system launches the *Steps to Add Credit* tool, which will guide you through the process of entering new credit.

Moving your cursor over the types of credit (program types) displays descriptions of each type.

Choose the type of credit and click **Save and Continue**.
Notice that the **Steps to Add Credit** display (on the left) now shows that you have completed the step for selecting a Credit Type and a check mark is displayed beside that step.

- The step title is highlighted in **blue**. You can click the blue text to return to that step and make changes.
  - As you progress through the credit entry process, each completed page will become highlighted in blue with a check mark next to it.
- You can also click the **Previous** button to return to the step immediately preceding this one.
- Subsequent steps in the process will also provide a **Skip** button if you do not need a step (adding Attachments or Notes, for example).

The following information to be entered can typically be obtained from a certificate of completion or other materials you received for participating in the course.

- Type in the credit identification number in the **Course Number** field (if applicable).
- Type in the credit event name in the **Title** field.
- Type in a short description for the event (if desired) in the **Description** field.
- Type in the start date of the event in the **Start Date** field.
- Type in the end date of the event in the **End Date** field.
- Type in the city where the event was held in the **City** field.
- Select the country where the event was held in the **Country** field, if other than the US.

**NOTE:** If you select USA, Mexico or Canada, the State field automatically becomes a drop down menu that is populated with the states or provinces of that country. If any other country is selected, the State field becomes a text field rather than a drop down menu.
Select the state or province from the drop down menu in the **State or Province** field.

Select the **Delivery Mode** (Group Live, Group Internet-Based, etc.) for the credit.

Type the first letter(s) of the provider name in the **Provider** field and the system will display all providers that begin with that letter. The Provider field searches from a list of personal providers you previously created, if any, as well as the listing of NASBA National Registry Sponsors. Click on the provider name to select it.

- If your provider does not appear in your list, click the **Add New Provider** link to go to the Add Provider page (see section on Manage CPE Providers on page 27).

### Provider Details

<table>
<thead>
<tr>
<th>Name</th>
<th>Big Orange CPE Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>5619 Old Dayton Pk</td>
</tr>
<tr>
<td>City</td>
<td>Hixson</td>
</tr>
<tr>
<td>State</td>
<td>Tennessee</td>
</tr>
<tr>
<td>Country</td>
<td>USA</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>37415</td>
</tr>
<tr>
<td>Phone</td>
<td>8658681234</td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td><a href="http://www.nasba.org">http://www.nasba.org</a></td>
</tr>
</tbody>
</table>

### List Providers

Show providers where **Name** begins with ![filter](filter)

Total Providers: 4

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>select provider view details</td>
<td>CPE Warehouse</td>
</tr>
<tr>
<td>select provider view details</td>
<td>Seattle Washington, 98401</td>
</tr>
<tr>
<td>select provider view details</td>
<td>Husky Accounting Education Group</td>
</tr>
<tr>
<td>select provider view details</td>
<td>Raymer, Thompson &amp; Tongate, LLP</td>
</tr>
<tr>
<td>select provider view details</td>
<td>Washington State Society of CPAs</td>
</tr>
</tbody>
</table>

- Select the **Click here to select this provider and return to credit entry link** to add your new provider to your credit.
- If you would like to view the complete list of providers that you have created in CPEtracking, click the **View Providers** link.
Depending on the program type selected, additional questions may be presented requesting additional information about the credit, such as whether credit was given in semester/quarter hours (College/University) or number of words (Authored/Published Material).

Click Save and Continue.

Select the Subject Area for the course from the drop down list.

Type in the number of credit hours requested for the course in the CPE Credits field.

NOTE: You may select from 23 subject areas (also called Fields of Study). The subject areas have been compiled based upon careful review by NASBA and the AICPA of the subject areas accepted by the boards of accountancy.

Click Add to add the subject area and hours.

The subject area and hours added will appear to the right as they are saved.

If additional subject areas and credits apply, select an additional subject area and the number of applicable credits. Click Add.

Once all subject areas have been added, click Continue.
- Any certificate of completion or other documentation concerning the course can be attached here. The file size cannot exceed 8MB.
- Click the Browse button to search your local computer drives for the desired document.
- Once the document is selected, click Attach.
- The document is listed under the Attachments box.

- Once all documents have been attached, click Continue.
The Credit Summary screen displays all information entered about your course.
Click the modify… link beside any of the four sections to make changes to your course.
If all of the information appears correctly, click the Add button.
You will return to the CPE Credits Reported page.

Editing Credits

Select the CPE Credits Reported tab
OR
Select CPE Credits Reported from the Manage CPE Credits tab.
Attendance Details

- Credits that were entered directly from a provider will show the attendance details link to their left.
- Click the attendance details link to the left of the course name to see the information provided for the credit:

<table>
<thead>
<tr>
<th>Course Details</th>
<th>Session Details</th>
<th>Agenda</th>
<th>Subjects</th>
<th>Review</th>
<th>My Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit Status:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not Audited</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>State Rules and Regulations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>07-1613B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>Other Organizations’ Programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provider</td>
<td>Husky Accounting Education Group</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Source</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Version Description</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revision Date</td>
<td>01/01/2010</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course Content</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Difficulty Level</td>
<td>Basic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prerequisites</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Prep</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Policies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- You can view details of the credit by clicking on the various tabs for the credit:

<table>
<thead>
<tr>
<th>Course Details</th>
<th>Session Details</th>
<th>Agenda</th>
<th>Subjects</th>
<th>Review</th>
<th>My Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery Mode</td>
<td>Group Internet-Based Live</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Saint Louis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Missouri</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>USA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>06/01/2012</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>06/01/2012</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Zone</td>
<td>GMT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If any of the information on these types of credit is incorrect, you will need to contact the provider directly.

**Credit Details**

- Credits that were entered by you show the credit details link to their left.
- Click the credit details link to the left of the course name to view detailed information about the credit.

A tabbed summary of the course information is displayed.
- Click on each tab to view details of the credit.
- The Credit Details tab displays general credit identification information.
  - Click edit to change only the credit identification information.
Make any changes to the text and selections displayed.
Click **Update**.
Click **edit program type** to change the type of credit.

---

**Edit In-Firm Programs Credit**

- **Course Number**: 07-1613E
- **Title**: Time Management for Supervisors
- **Start Date**: 02/12/2012
- **End Date**: 02/12/2012
- **City**: Nashville
- **Country**: USA
- **State**: Tennessee
- **Delivery Mode**: Group Live
- **Provider**: Raymer, Thompson & Tongate, LLP

---

**Add New Credit**

**Step 1**: Is this a Self-Study Course? If so, select Self-Study and click Save & Continue.
- Self-Study

**Step 2**: If this is not a Self-Study course, select the type of program below and click Save & Continue. Definitions for each are provided if you hover over the different categories:
- AICPA and State Society Programs
- Authored Published Material
- Breakfast/Lunch/Dinner Meetings
- College and University Courses
- Committee Meetings
- Firm Meetings
- In-Firm Programs
- Instructed
- Other Organizations' Programs
- Practice Review
- Technical Meetings
The information currently entered will appear in each step and can be edited.

- Click **delete** from the Credit Details tab to remove the credit from your transcript.

  ![Delete Credit](image)

  Are you sure you want to delete this record?

  - Click **Yes** to delete the credit and all of its information.
  - Click **No** to return to the previous screen.

- **Add Copy**: This allows you to copy the details of a course if you want to create a similar course and not have to re-type all of the information.
  - Click **add copy**.
    - The system launches the Steps to Add Credit tool with all of the previously entered course information populated.
    - As you go through the Steps to Add Credit, make any necessary changes to the credit to create a new credit.

- The **Subject Areas** tab displays the current subject areas selected and your respective CPE credit amounts for each subject.
  - Click **add** to add another subject area and credit amount.
  - Click **edit** to change the amount of CPE credit that a subject area is worth.
  - Click **delete** to remove the subject area from the credit.
The Attachments tab displays any attached documents on this credit and allows you to add new documents to the credit as described in the Add New Credit section.

- Click the download link to view the current attachment.
- Click the delete link to permanently remove the attachment.

Credits Created in Another Installation of CPETracking

- Credits entered in to one Board installation of CPETracking will automatically populate to other state installations of CPETracking along with their attachments (ex. If you are licensed in both Missouri and Tennessee).
- Credits can only be edited in the site in which they were created.

- The Credit Source field shows the installation of CPETracking where the credit was created.
• If the credit was created in the current installation you are signed in to, this field does not appear and the course can be edited in the current site.
Manage CPE Providers

- From the Manage CPE Credits tab, click Manage CPE Providers.

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Ridge Mountain CPE</td>
<td>USA</td>
</tr>
<tr>
<td>Darrel Tongate CPAs</td>
<td>St. Louis Missouri</td>
</tr>
<tr>
<td>NASBA</td>
<td>Nashville Tennessee, 37219</td>
</tr>
<tr>
<td>Tarheel CPE</td>
<td>Gastonia North Carolina, 24862</td>
</tr>
<tr>
<td>University of Missouri</td>
<td>USA</td>
</tr>
</tbody>
</table>

- A list of providers you entered into the system is displayed.
- To search for a particular provider, type in the first letter or letters of the provider’s name.
- Click filter.

Adding a New Provider

- Click add new provider.
• Type the provider name in the **Name** field.
• Type the provider’s address in the **Address** field.
• Type the provider’s city in the **City** field.
• Select the provider’s country from the drop-down menu.
• Type in the provider’s state or province in the **State** field.
• Type in the provider’s zip/postal code in that field.
• Type in the providers’ phone number in the **Phone** field.
• Type in the provider’s fax number in the **Fax** field.
• Type the provider contact’s e-mail address in the **Email** field. **NOTE:** The system looks for a standard e-mail format: user@nomail.com, for example.
• Type the provider’s website address in the **URL** field. **NOTE:** The web address must begin with http:// (http://www.webaddress.com, for example).
• Click **Undo Changes** to clear all fields on the screen.
• Click **Add** to add the provider to your list.

![List Providers](image)

**View Current Provider Information:** Allows you to view information about a provider in your list.

• Click the **view details** link next to the desired provider.
The provider’s current information is displayed.

To send an e-mail to your provider contact, click on the e-mail address in blue. Your local e-mail program will launch and that e-mail address populated in the To: field of the e-mail.

To go to the provider’s website, click on the web address in blue and your internet browser will launch and direct you to that web address.

**Edit Provider Information:** Allows you to change any of the provider identifying information displayed.

- Click the edit link next to the desired provider or in the Provider Details window.
- Make any desired changes to the information displayed.
- Click **Undo Changes** to return fields to their previous values.
- Click **Update Provider** to save your changes.

**Delete A Provider**: Allows you to delete the provider.

- Click the **delete** link next to the desired provider or in the Provider Details window.

  ![Delete Provider](image)

- If a provider has credits associated with it, you cannot delete the provider until you delete the credits associated with it.
- Click **Yes** to delete the provider.
- Click **No** to return to the List Providers view.

**Add Registration**: If your state requires providers to be approved by a Board of Accountancy, CPEtracking allows you to add provider registration number(s) to the provider records you create.

- Click the **add registration** link.

  ![Add Registration](image)

- Select the appropriate jurisdiction from the drop down list in the Registrar field.
- Select the delivery mode the provider is approved for from the drop down list in the Delivery Mode field.
  - Choices are Group Internet Based-Live, Group Live, Interactive Self Study, Non-Interactive Self Study and All.
  - You can add multiple delivery methods.
- Type the registration number for that jurisdiction in the Registration Number field.
- Enter the provider’s approval start date in the Registration Start Date field.
- Enter the provider’s approval end date in the Registration End Date field.
- Click **Add** to add the registration number.
- Repeat the steps to add any additional registration numbers or delivery methods for the provider.
- Click **Undo Changes** to clear the registration number field prior to adding a number.
- Click **Done** to save the provider number(s).

<table>
<thead>
<tr>
<th>Add Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registrant:</td>
</tr>
<tr>
<td>Delivery Mode:</td>
</tr>
<tr>
<td>Registration Number:</td>
</tr>
<tr>
<td>Registration Start Date:</td>
</tr>
<tr>
<td>Registration End Date:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current Registrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registrar: Tennessee</td>
</tr>
<tr>
<td>Delivery Mode: All</td>
</tr>
<tr>
<td>Registration Number: 123456</td>
</tr>
<tr>
<td>Start Date: All</td>
</tr>
<tr>
<td>End Date: All</td>
</tr>
</tbody>
</table>

- The state registry is attached to the user’s provider record.

<table>
<thead>
<tr>
<th>Provider Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong>: Accounting Continuing Education Corporation</td>
</tr>
<tr>
<td><strong>Address</strong>: 2018 Castile Dr</td>
</tr>
<tr>
<td><strong>City</strong>: Palm Harbor</td>
</tr>
<tr>
<td><strong>State</strong>: Florida</td>
</tr>
<tr>
<td><strong>Country</strong>: USA</td>
</tr>
<tr>
<td><strong>Zip/Postal Code</strong>: 34683</td>
</tr>
<tr>
<td><strong>Phone</strong>: 615-828-2300</td>
</tr>
<tr>
<td><strong>Fax</strong>:</td>
</tr>
<tr>
<td><strong>Email</strong>: <a href="mailto:atongate@nasba.org">atongate@nasba.org</a></td>
</tr>
<tr>
<td><strong>Url</strong>: <a href="http://www.nasba.org">http://www.nasba.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Registrar</th>
<th>Number</th>
<th>Delivery</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tennessee</td>
<td>123456</td>
<td>All</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Click the **edit** link to change the Registrar state, number, delivery methods or start/end dates.
- Click the **delete** link to remove the Registrar from the provider record.

**Subscribe to NASBA Registrar:** If your state’s CPE rules require that CPE providers be State Board or NASBA Registry of CPE Sponsors approved, CPEtracking allows you to search and subscribe to the NASBA Provider Registry record for the provider. The delivery methods and start and end dates for the provider’s NASBA National Registry account will be automatically updated by NASBA.

- Click the **subscribe to registrar** link.
Type the provider name in the **Provider** field.
- The system will search for providers with the letters you type and display a list of matches.

Similarly, users can type the NASBA Registry ID in the **Registrar ID** field.
- The Provider name, registrar (NASBA) and the Registry Sponsor ID are populated in either the Provider or Registrar ID field, depending on the field used for the search.
- Click **Reset** to return fields to their default state.
- Click **Add** to subscribe the user’s provider to the NASBA Registry record.
The provider’s Registry information is displayed with their approved delivery methods and the Start Date (and where applicable End Date) of their Registry membership.

- Click the return link to go back to the provider record.
- The subscription information is linked with the provider created by the user.

Click the subscription link and then the delete link to remove the NASBA Registry subscription from the user’s provider.
CPE Status

- If the Board has chosen to enable this functionality, you can run a report that compares the credits entered to the CPE rules and regulations the state.
  - Please be advised that the accuracy of the CPE compliance in this report is dependent upon the validity of the information submitted by the licensee and/or CPE providers to the CPEtracking system. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit based on the rules and regulations of the relevant jurisdiction. Please refer to the Limitation of Liability section of the Terms of Use for the CPEtracking software.
- Click the CPE Status tab
  - OR
- Select CPE Status from the Manage CPE Credits tab.
  - OR
- Select the Check CPE Status link on the CPE Credits Reported tab.

- The start and end date for the current and previous CPE reporting periods in your state are displayed.
- Select the desired reporting period date range in blue to generate a CPE Status report.
The report will include your CPE Requirements, Totals by Program, Totals by Subject Area and any information you provided to establish reporting periods for this jurisdiction.

The credits you entered are compared to the Board's CPE rules to yield the summary.
The Credits Earned table comprises the second page of the report and displays courses where credits were granted toward requirements.
• A listing of any credits that were not counted as meeting requirements comprises the third page of the report, with the rule applied listed in the (Credits Denied) Reasons column. If no credits were denied, this page will not be generated.

• This report can be saved to your local computer drives and printed for reference.
Submit to Board

Once all of your credit earned in the reporting period has been entered, click the Submit to Board tab.
  - OR
Select Submit to Board from the Manage CPE Credits tab.

If you have completed entering your CPE credit and are ready to submit this information to the Board, please click the Submit to Board button below. Once submitted, your account will be disabled and will not be accessible during the evaluation period. It will be re-enabled once the evaluation has been completed.

Will you be claiming home state exemption? If so, please click "yes" and indicate the state that is your home state in order for your CPE compliance to be based on your home state's requirements. ☐ Yes ☐ No

NOTE: 5 credit events in your profile do not include any attachments. If you would like to correct this, please select the CPE Credits Reported tab.

If you would like to save a record of your CPE credit submitted, please select one of the following links: Printable View | Export Details

Submit to Board

Read all of the information presented on the screen.
  - If your state allows home state exemption and you did not choose to use that rule on your first login, you will also see an option to use that rule here.
  - Click the Submit to Board link to complete your transcript submission to the board.
• The Board Submission Confirmation screen offers the option to create a version of your transcript to save.
  o To save a record of your CPE credit submitted click the *Printable View* link to create a .pdf version of your transcript for the current reporting period.
  o Click the *Export Details* link to create a .csv file of your transcript.
• Clicking the *Yes* button will submit your transcript for audit, log you out of CPEtracking and disable your account for the duration of the evaluation period.
• Clicking the *No* button will return you to the CPE Credits Reported view.
Phone or E-mail Assistance

<table>
<thead>
<tr>
<th>Phone</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toll free: 844-273-8722</td>
<td><a href="mailto:CPEtracking@nasba.org">CPEtracking@nasba.org</a></td>
</tr>
</tbody>
</table>

Hours are generally 8:00am-4:30pm CST/CDT-Monday through Friday.