NASBA cpeauditservice

CPA Upload Credits

CPE courses for a given licensee can be input to the Credit Upload Template and then be uploaded into the CPE Audit Service. Open the "CPE Audit Service – Credit Upload Template.xlsx" file under the CPA Upload help topic. The template contains a few sample rows – be sure to delete these before saving and uploading your file!

1. The CPA Credit Upload Data Guide below matches the columns in the template file.

CPA Credit Upload Data Guide			**Notes**
Column/Field	**Required**	**Acceptable Values**	
Delivery Method	Yes	Group Live Group Internet-Based Blended Learning Nano Learning Interactive Self Study Non-interactive Self Study QAS Self Study Other	Capitalization and characters must match
Program Type	Yes	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 Organization's Programs Practice Review Self-Study Technical Meetings	Capitalization and Characters must match
Title	Yes	Title for the program/course.	
Course Number	No	Course number identifier or code (if provided)	
Description	No	Description of the program/course.	
Start Date	Yes	Date must be formatted MM/DD/YYYY	In Excel, you will need to format the date cell as a Category of Custom and put mm/dd/yyyy in the Type field.
End Date	Yes	Date must be formatted MM/DD/YYYY	In Excel, you will need to format the date cell

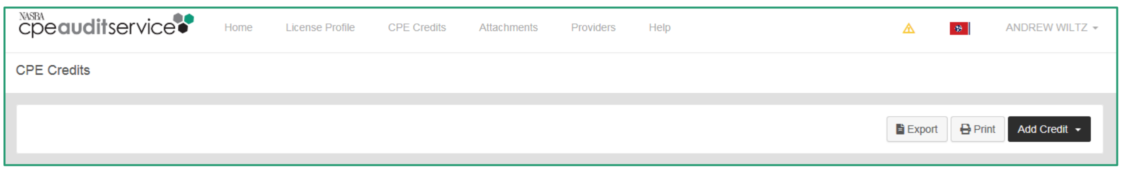
			as a Category of Custom and put mm/dd/yyyy in the Type field.
Country	No	Location of the program/course.	USA or the country name spelled out such as “Canada”
State	No	Location of the program/course.	If the country is = USA, then use the two letter abbreviation for the state – such as TN for Tennessee.
City	No	Location of the program/course.	
NASBA Provider ID	No	Six digit NASBA Registry ID number	Include the six digit number here, if the provider is a NASBA Registry Sponsor
Provider	Yes	Provider/Facilitator of the program/course.	

Subject Area	Yes	Accounting Accounting (Governmental) Administrative Practice Auditing Auditing (Governmental) Behavioral Ethics Business Law Business Management & Organization Communications Communications & Marketing Computer Science Computer Software & Applications Economics Finance Information Technology Management Advisory Services Management Services Marketing Mathematics Personal Development Personnel/HR Production Regulatory Ethics Social Environment of Business Specialized Knowledge Specialized Knowledge & Applications Statistics Tax Taxes	If there are multiple subject areas, there will need to be a separate row for each subject area with the course information and that subject's credit.
CPE Credit	Yes	Number of CPE Credits for the given subject area(s).	If there are multiple subject areas with CPE credit, there will need to be a separate row for each subject area with the course information and that subject area's credit.

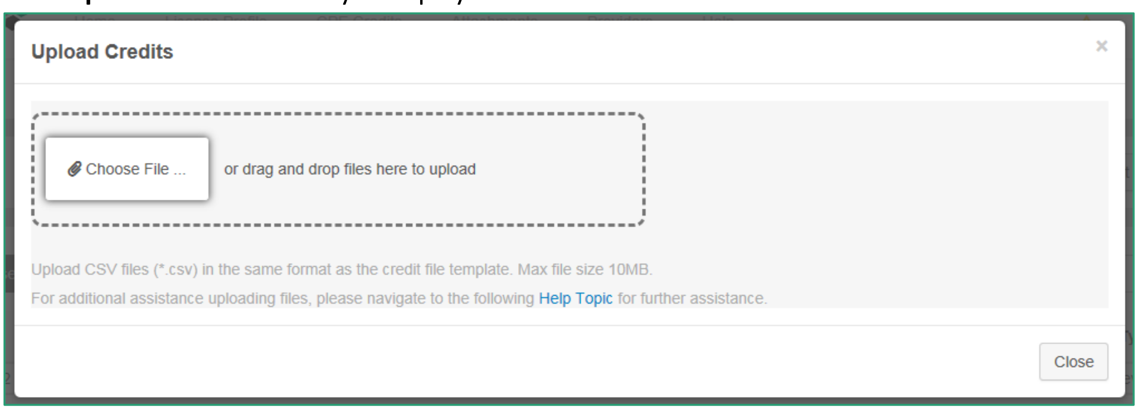
   a. If the column is required to be included, it is noted with a "Yes" in the Required section above. Otherwise, the value is "No".
   b. All of the columns must be present in the file whether they are required or not. They can be left blank if a value is not required.
   c. The Acceptable Values section in the grid above displays the type of information that is allowed in the column.
2. Complete the template with your CPE course details.
3. Save the file in Excel as a .csv file.
   a. Choose **Save As** in Excel.

   b. The filename is listed first in the Save As dialog box.
   c. The default format will be Excel workbook (*.xlsx) or Excel 97- 2003 Workbook (*.xls).
   d. Choose the CSV UTF-8 (Comma delimited) (*.csv) format from the format dropdown provided.
   e. Choose the **Save** button.
   f. NOTE: Every time a .csv file is opened in Excel, the date format is updated automatically by the Excel application. You must reformat the Start Date and End Date columns every time to the mm/dd/yyyy format.

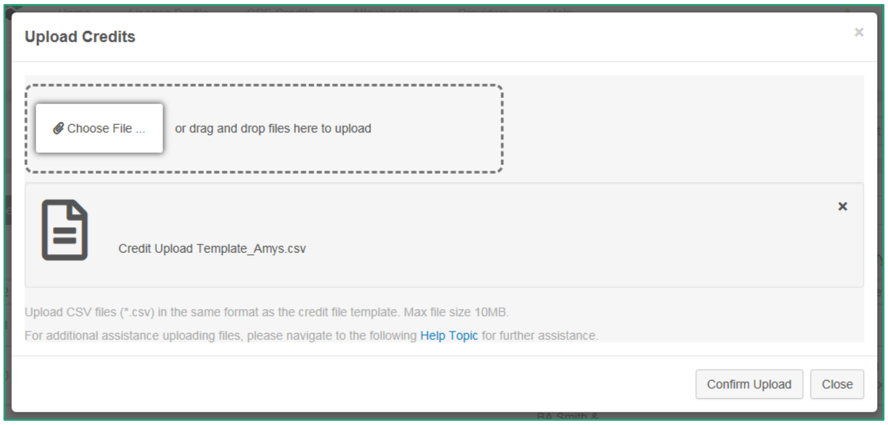
4. Log in to your CPE Audit Service account.



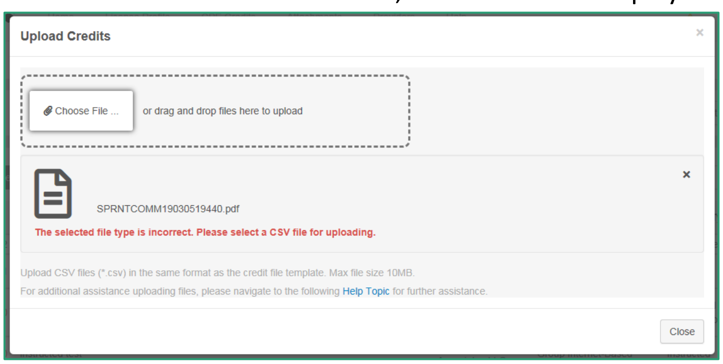
5. Choose the **CPE Credits** option from the menu bar across the top of the landing page.
6. Choose the **Add Credits** button at the top right of the credits grid and select the **Upload** option.
7. The **"Upload Credits"** overlay is displayed.



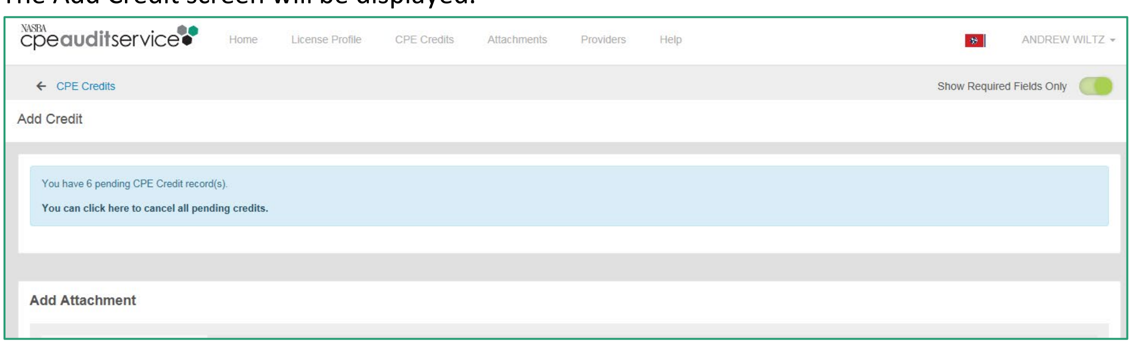
   a. Select the "Choose File" button.
   b. A dialog showing your local computer drive(s) is displayed.
   c. Navigate to where your .csv file is saved.
   d. Select the file.
   e. Choose the Open button.
   f. The file is displayed below the Choose File section of the overlay.



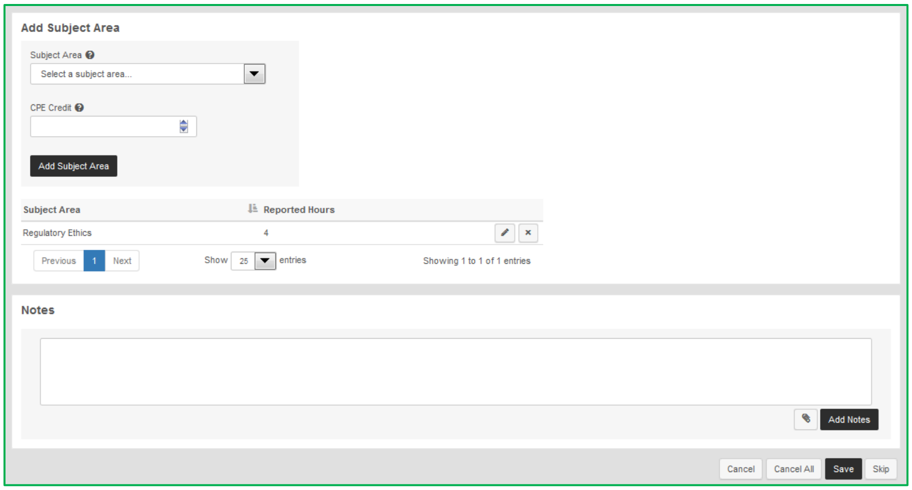
8. Choose the "Confirm Upload" button.
    a. Click the "X" button to the right of the file listed to remove it.
    b. Choose the **Close** button if you do not want to continue uploading the file.
9. The "Confirm Upload" button will briefly change to say "Uploading" as it processes the file.
    a. Files cannot be larger than 10MB in size. If the file is too large, an error message will be displayed.
    b. If the file is not in the .csv format, an error will be displayed.



10. The Add Credit screen will be displayed.



11. The number of credits pending (which corresponds to the number of rows in your uploaded file) is displayed in a blue message box above the Add Attachments section.
    a. You may click the message "You can click here to cancel all pending credits" to exit the **Add Credit** process.
12. The data from the first row of your file's information populated in the fields on the page.
13. Review the information populated in the fields and make any necessary edits.



14. Choose the **Save** button to move to the next row in your uploaded file.
    a. Choose the **Cancel** button to skip the pending credit displayed. It will not be saved, and the process will move to the next row in the file.
    b. Choose the **Cancel All** button to stop uploading any rows from your file.
15. Choose the **Skip** button to move to the next row in the file without saving any changes. The skipped courses will remain in a pending status until saved or pending items are cancelled.
16. Once all of the pending rows have been processed, you will be returned to the CPE Credits screen and your saved courses will be included in your transcript.