



User Manual for Licensees

04/14/14

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Signing on to the System

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

cpetracking
report your cpe

Login

License Number:

Password:

Login

[Forgot your password?](#)

NASBA

State CPE Reporting

First Time Here:

State CPAs should log in using their State license (registration) number and issued password. If you do not know your password, please contact the State Board of Accountancy.

Returning:

State CPAs who have already accessed CPE accounts can log in using their State issued CPA license (registration) number and password. The CPE accounts can be accessed during the audit submission period.

Already Submitted:

State CPAs who have already submitted all CPE records to the State Board using this system will not be able to login and access the CPE account until the evaluation period has ended. The State Board may grant access to accounts upon request on a case by case basis. Please contact the State Board to request access to your account.

- 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:

Change Email

Please Supply A Valid Email Address To Begin Using The System.

New Email Address

Confirm Email Address

Undo Changes
Change Email

- 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?

For security purposes, a confirmation will be sent to your email address; open the email and click on the provided link to change your password

Enter your license number:

Enter your email address:

Back
Next

- 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.

Home State Exemption

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.

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.

Submit

- 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

NOTE: 1 credit If you would like to use home state exemption, please click "Yes" and indicate the state that is your home state.

ments. Reported tab.

*Select a Jurisdiction

- *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

- Click the **Submit** button.
- Questions will be presented to establish your reporting periods for your home state.
- 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.

The screenshot shows the 'Test Licensee' user profile page. At the top right, the 'logout' link is circled in yellow. The page contains a 'My Profile' section with the following details:

Login ID	licensee	change password
Email Address	licensee@naaba.org	change email address
First Name	Test	
Middle Name		
Last Name	Licensee	
Address		
City		
State		
Country	USA	
Zip/Postal Code		
Phone Number		
Fax Number		
Jurisdiction Membership	Missouri	
License Date	05/15/2010	
License Number	112569	Review CPE Requirements

Additional text on the page includes: "If any details of your profile are incorrect, please contact the State Board to update your records." and "Missouri State Board of Accountancy 573.751.0012 Telephone 800.735.2466 Voice Relay mosba@br.mo.gov http://br.mo.gov/accountancy-coa.asp (ONLINE address change)"

Navigating CPETracking

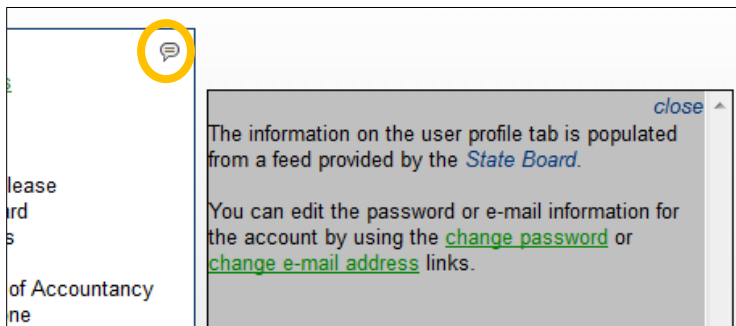
Test Licensee

tlicensee@nasba.org

My Profile	CPE Credits Reported	CPE Status	Submit to Board
-------------------	----------------------	------------	-----------------

Login ID	tlicensee	change password change email address
Email Address	tlicensee@nasba.org	
First Name	Test	If any details of your profile are incorrect, please contact the State Board to update your records Missouri State Board of Accountancy 573.751.0012 Telephone 800.735.2466 Voice Relay mosba@pr.mo.gov http://pr.mo.gov/accountancy-coa.asp (ONLINE address change)
Middle Name		
Last Name	Licensee	
Address		
City		
State		
Country	USA	
Zip/Postal Code		
Phone Number		
Fax Number		
Jurisdiction Membership	Missouri	
License Date	05/15/2010	Review CPE Requirements
License Number	112569	

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.



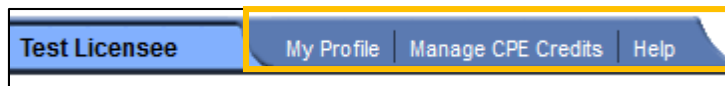
[Links](#) appear throughout CPETracking screens. Clicking on these phrases or commands highlighted in [green](#) and underlined will allow you to perform additional functions on the screen you are currently viewing.

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.

Test Licensee
tlicensee@nasba.org

[My Profile](#) [CPE Credits Reported](#) [CPE Status](#) [Submit to Board](#)

Login ID	tlicensee	change password change email address
Email Address	tlicensee@nasba.org	
First Name	Test	If any details of your profile are incorrect, please contact the State Board to update your records Missouri State Board of Accountancy 573.751.0012 Telephone 800.735.2466 Voice Relay mosba@pr.mo.gov http://pr.mo.gov/accountancy-coa.asp (ONLINE address change)
Middle Name		
Last Name	Licensee	
Address		
City		
State		
Country	USA	
Zip/Postal Code		
Phone Number		
Fax Number		
Jurisdiction Membership	Missouri	
License Date	05/15/2010	Review CPE Requirements
License Number	112569	

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

[My Profile](#)
[CPE Credits Reported](#)
[CPE Status](#)
[Submit to Board](#)

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.

Test Licensee
licensee@nasba.org

[My Profile](#)
[CPE Credits Reported](#)
[CPE Status](#)
[Submit to Board](#)

From Date: 01/01/2011 To Date: 12/31/2014 [Run Report](#)
 Program: [All] Export Details Printable View

[Add New Credit](#)
[Check CPE Status](#)

AICPA and State Society Programs

Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?
credit details 02-0314B	Auditing Update 2014	01/31/2014	01/31/2014	Group Live	University of Tennessee Conferences	Auditing	8.00	No
Total:							8.00	

In-Firm Programs

Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?
credit details 02-0314C	Time Management for Supervisors	02/01/2014	02/01/2014	Group Live	Buchanan, Raymer & Tongate, LLP	Personal Development	2.00	Yes
Total:							2.00	

Other Organizations' Programs

Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?
credit details 02-0314D	Ethics for Accountants	12/01/2013	12/01/2013	Group Live	University of Tennessee Conferences	Regulatory Ethics	4.00	No
Total:							4.00	

Self-Study

Course Number	Title	Start Date	End Date	Type of Self Study	Provider	Subject Areas	Reported	Attachment?
credit details 02-0314A	Workplace Harassment	01/15/2014	01/15/2014	Interactive / New Self-Study	NASBA Center For The Public Trust	Behavioral Ethics	4.00	Yes
Total:							4.00	

- 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

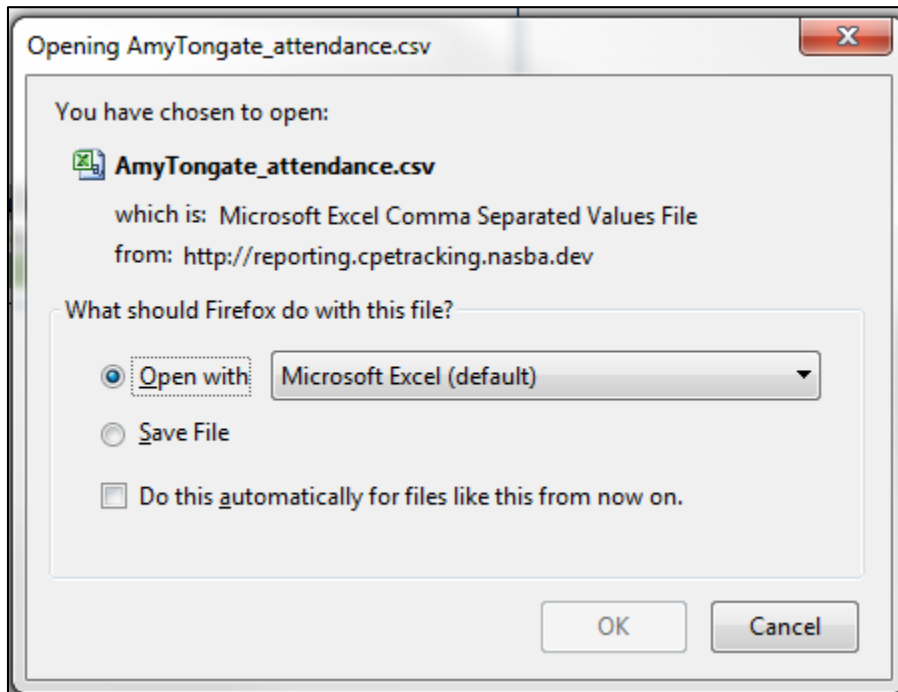
- **Provider**
- **Subject Areas**
- **Reported** total number of credits
- **Attachments?** Indicates whether or not a document (such as a certificate of completion) has been added to the credit.
 - If a credit was input directly from a provider, this will show “Reported by Provider”.

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

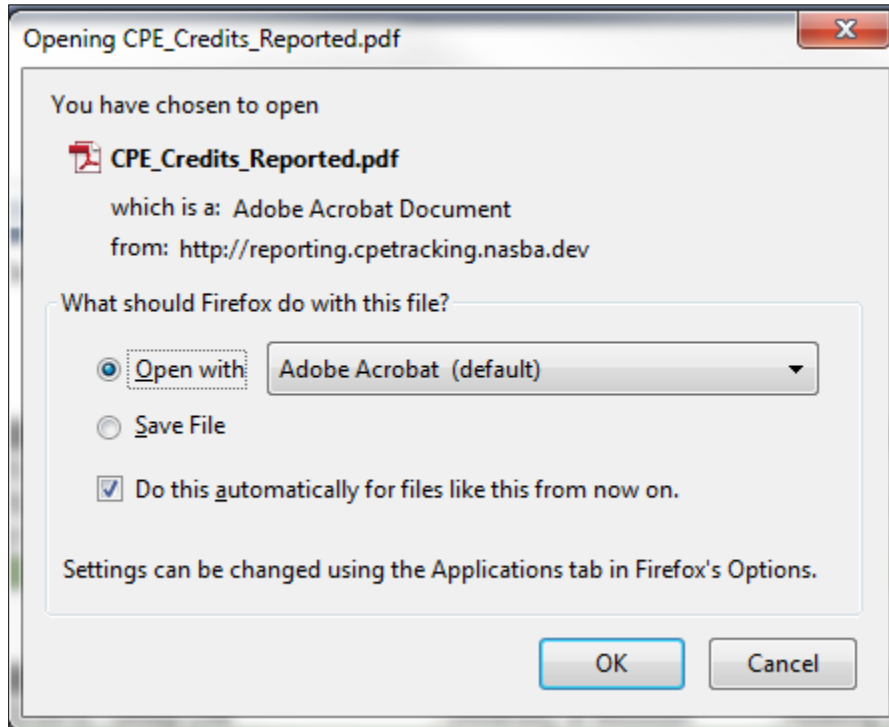
- To view the results in a spreadsheet format, click the box beside “Export Details” and click the **Run Report** button. This file can be saved on your local computer drive.



- 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.



Test Licensee
licensee@nasba.org

My Profile | **CPE Credits Reported** | CPE Status | Submit to Board

From Date: 01/01/2011 To Date: 12/31/2014 **Run Report**

Program: [All] Export Details Printable View

Add New Credit
[Check CPE Status](#)

AICPA and State Society Programs									
	Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?
credit details	02-0314B	Auditing Update 2014	01/31/2014	01/31/2014	Group Live	University of Tennessee Conferences	Auditing	8.00	No
								Total:	8.00

In-Firm Programs									
	Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?
credit details	02-0314C	Time Management for Supervisors	02/01/2014	02/01/2014	Group Live	Buchanan, Raymer & Tongate, LLP	Personal Development	2.00	Yes
								Total:	2.00

Other Organizations' Programs									
	Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?
credit details	02-0314D	Ethics for Accountants	12/01/2013	12/01/2013	Group Live	University of Tennessee Conferences	Regulatory Ethics	4.00	No
								Total:	4.00

Self-Study									
	Course Number	Title	Start Date	End Date	Type of Self Study	Provider	Subject Areas	Reported	Attachment?
credit details	02-0314A	Workplace Harassment	01/15/2014	01/15/2014	Interactive / New Self-Study	NASBA Center For The Public Trust	Behavioral Ethics	4.00	Yes
								Total:	4.00

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.

Steps to Add Credit

→ Credit Type
 Credit Information
 Subject Areas
 Attachments
 Credit Summary

Skip

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

Save & Continue

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

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

Save & Continue

College and University Courses
 Courses taken at a college, university or other institution of higher learning.

- Choose the type of credit and click **Save and Continue**.

Steps to Add Credit

- Credit Type**
- Credit Information**
- Subject Areas
- Attachments
- Credit Summary

Previous
Skip

Add AICPA and State Society Programs

Course Number

Title*

Description

Start Date*

End Date*

City

Country* USA

State Or Province* ▼

Delivery Mode* Group Live

Provider* <Begin typing to search> [Add New Provider](#)
[View Providers](#)

Start typing the name of the CPE provider. If the provider does not appear in the field, select the "Add New Provider" link. Enter the provider details in the pop up window, and click "Add." Close the pop up window and again start typing the name of the provider you added in the Provider field. The provider will now automatically populate in the field. Click Save & Continue to move to the next step.

Reset
Save & 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).

[Click here to select this provider and return to credit entry](#)

Provider Details

Name Big Orange CPE Provider
Address 5619 Old Dayton Pk
City Hixson
State Tennessee
Country USA
Zip/Postal Code 37415
Phone 8658681234
Fax
Email
Url <http://www.nasba.org>

[add registration](#) [subscribe to registrar](#)

Registrar **Number** **Delivery** **Start Date** **End Date**

- 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.

List Providers

Show providers where begins with

Total Providers: 4 [add new provider](#)

	<i>Name</i>	<i>Location</i>
select provider view details	CPE Warehouse	Seattle Washington, 98401
select provider view details	Husky Accounting Education Group	Tacoma Washington, 98401
select provider view details	Raymer, Thompson & Tongate, LLP	Port Angeles Washington, 98362
select provider view details	Washington State Society of CPAs	Bellevue Washington, 98005

- 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**.

Steps to Add Credit

- Credit Type
- Credit Information
- ➔ Subject Areas**
- Attachments
- Credit Summary

Add AICPA and State Society Programs Subject

Subject Area* Accounting

CPE Credits*

There are currently no CPE Credits.

[Undo Changes](#) [Add](#) [Continue](#)

[Previous](#) [Skip](#)

- 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.

Steps to Add Credit

- Credit Type
- Credit Information
- ➔ Subject Areas**
- Attachments
- Credit Summary

Add AICPA and State Society Programs Subject

Subject Area* Accounting

CPE Credits*

Subject Area	CPE Credits
edit delete Auditing	6.00

[Undo Changes](#) [Add](#) [Continue](#)

[Previous](#) [Skip](#)

- 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**.

Steps to Add Credit

- Credit Type
- Credit Information
- Subject Areas
- Attachments
- Credit Summary

Attachments

No Attachments

Attach file

Note: Acceptable documentation of CPE attendance varies by state. Please refer to you Board rules to review their documentation specifications.

File No file selected.

- 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.

Steps to Add Credit

- Credit Type
- Credit Information
- Subject Areas
- Attachments
- Credit Summary

Attachments

		Name	Attached By	Date
download	delete	cprcert.jpg	Tongate, Amy	03/25/2014

Attach file

Note: Acceptable documentation of CPE attendance varies by state. Please refer to you Board rules to review their documentation specifications.

File No file selected.

- Once all documents have been attached, click **Continue**.

Steps to Add Credit

- Credit Type
- Credit Information
- Subject Areas
- Attachments
- ➔ Credit Summary**

Previous

Credit Type AICPA and State Society Programs
[modify event type](#)

Credit Information Course Number 02-1014B
[modify event Information](#) Title Auditing Update 2014
Description
Start Date 01/21/2014
End Date 01/21/2014
City
Country USA
State Or Province Tennessee
Delivery Mode Group Live
Provider Berkeley Capital Management LLC

Subjects Areas	Subject	CPE Credits
modify subject areas	Accounting	1.00

Attachments **Name** **Attached By** **Date**
[modify attachments](#)
[download](#) cprcert.jpg Tongate, Amy 04/14/2014

Add

- 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.

Test Licensee										
#licensee@nasba.org										
My Profile		CPE Credits Reported		CPE Status		Submit to Board				
From Date	01/01/2011	To Date	12/31/2014	Run Report						
Program	[All]			<input type="checkbox"/> Export Details		<input type="checkbox"/> Printable View				
Add New Credit 🗨 Check CPE Status										
AICPA and State Society Programs										
Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?		
credit details	02-0314B	Auditing Update 2014	01/31/2014	01/31/2014	Group Live	University of Tennessee Conferences	Auditing	8.00	No	
							Total:	8.00		
In-Firm Programs										
Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?		
credit details	02-0314C	Time Management for Supervisors	02/01/2014	02/01/2014	Group Live	Buchanan, Raymer & Tongate, LLP	Personal Development	2.00	Yes	
							Total:	2.00		
Other Organizations' Programs										
Course Number	Title	Start Date	End Date	Delivery Mode	Provider	Subject Areas	Reported	Attachment?		
credit details	02-0314D	Ethics for Accountants	12/01/2013	12/01/2013	Group Live	University of Tennessee Conferences	Regulatory Ethics	4.00	No	
							Total:	4.00		
Self-Study										
Course Number	Title	Start Date	End Date	Type of Self Study	Provider	Subject Areas	Reported	Attachment?		
credit details	02-0314A	Workplace Harassment	01/15/2014	01/15/2014	Interactive / New Self-Study	NASBA Center For The Public Trust	Behavioral Ethics	4.00	Yes	
							Total:	4.00		

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:

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

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

Course Details	Session Details	Agenda	Subjects	Review	My Attendance
Session	1				
Delivery Mode	Group Internet-Based Live				
Facility					
City	Saint Louis				
State	Missouri				
Country	USA				
Start Date	06/01/2012				
End Date	06/01/2012				
Start Time					
End Time					
Time Zone	GMT				
Cost					

[return](#)

Course Details	Session Details	Agenda	Subjects	Review	My Attendance
----------------	-----------------	--------	----------	--------	----------------------

Attendance Details	
Subject	CPE Hours
Regulatory Ethics	4.00

- 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.

Credit Details	Subject Areas	Attachments
-----------------------	---------------	-------------

edit edit program type delete add copy	
Audit Status:	Not Audited
Program Name	In-Firm Programs
Course Number	07-1613E
Title	Time Management for Supervisors
Description	
Start Date	02/12/2012
End Date	02/12/2012
City	Nashville
Country	USA
State	Tennessee
Delivery Mode	Group Live
Provider	<i>Raymer, Thompson & Tongate, LLP</i>

- 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.

Edit In-Firm Programs Credit

Course Number
Title*
Description
Start Date*
End Date*
City
Country*
State*
Delivery Mode*
Provider*
[Add New Provider](#)
[View Providers](#)

- Make any changes to the text and selections displayed.
- Click **Update**.
- Click [edit program type](#) to change the type of credit.

Steps to Add Credit

- ➔ **Credit Type**
- Credit Information
- Subject Areas
- Attachments
- Credit Summary

Add New Credit

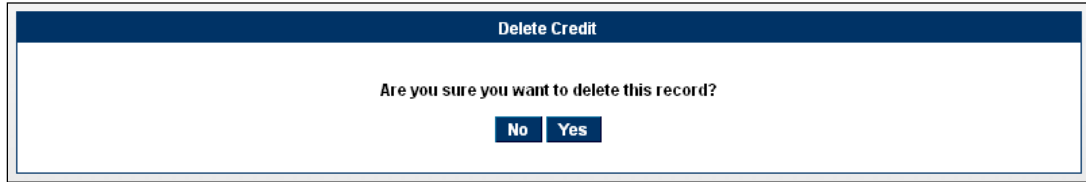
Step 1: Is this a Self-Study Course? If so, select Self-Study and click Save & Continue.

Self-Study

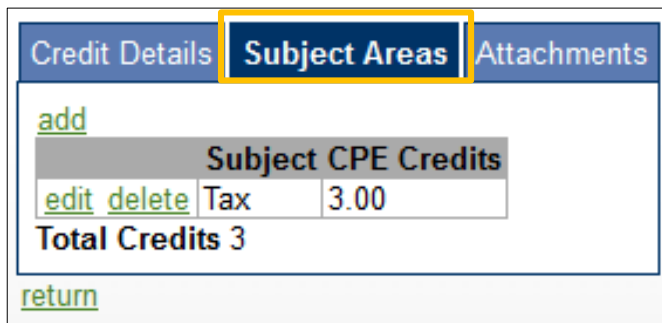
Step 2: If this is not a Self-Study course, select the type of program below and click Save & Continue. Definitions for each are provided if you hover over the different categories.

- 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.



- 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.

Credit Details	Subject Areas	Attachments
----------------	---------------	--------------------

Attachments

Name	Attached By	Date
download delete cprcert.jpg	Tongate, Amy	03/21/2014

Attachments: 1

Attach file

Note: Acceptable documentation of CPE attendance varies by state. Please refer to you Board rules to review their documentation specifications.

File No file selected.

- 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.

Credit Details	Subject Areas	Attachments
----------------	---------------	-------------

Audit Status:	Not Audited
Credit Source:	Missouri
Program Name	In-Firm Programs
Course Number	
Title	3m & strategy circle Process
Description	
Start Date	05/13/2013
End Date	05/13/2013
City	
Country	USA
State	Missouri
Delivery Mode	Group Live
Provider	Great Minds, LLC

- 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](#).

List Providers

Show providers where Name begins with filter

Total Providers: 5 [add new provider](#)

	Name	Location
view details edit delete	Blue Ridge Mountain CPE	USA,
view details edit delete	Darrel Tongate CPAs	Sant Louis Missouri,
view details edit delete	NASBA	Nashville Tennessee, 37219
view details edit delete	Tarheel CPE	Gastonia North Carolina, 24862
view details edit delete	University of Missouri	USA,

- 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](#).

Add Provider

Name*:

Address

City

Country USA

State

Zip/Postal Code

Phone

Fax

Email

Url:

Undo Changes Add

- 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: auser@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

Show providers where Name ▾ begins with filter

Total Providers: 6 [add new provider](#)

	Name	Location
view details edit delete	Blue Ridge Mountain CPE	USA,
view details edit delete	Darrel Tongate CPAs	Sant Louis Missouri,
view details edit delete	NASBA	Nashville Tennessee, 37219
view details edit delete	Sunshine State CPE	Palm Harbor Florida, 34682
view details edit delete	Tarheel CPE	Gastonia North Carolina, 24862
view details edit delete	University of Missouri	USA,

[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.

Provider Details	
edit	delete
Name	NASBA
Address	150 Fourth Avenue North Suite 700
City	Nashville
State	Tennessee
Country	USA
Zip/Postal Code	37219
Phone	5555555555
Fax	5555555555
Email	gatester@nasba.org
Url	

- 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.

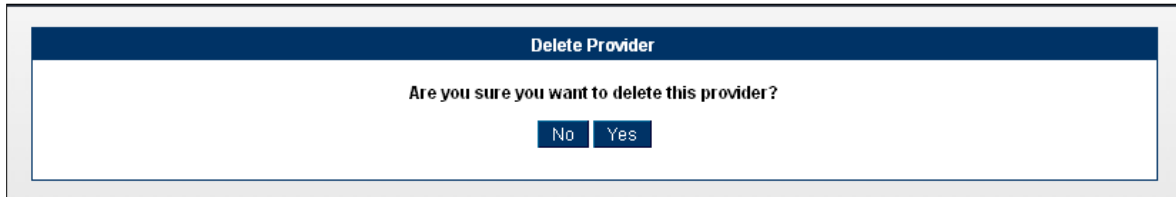
- Click the [edit](#) link next to the desired provider or in the Provider Details window.

Edit Provider Details	
Name* 	<input type="text" value="CPE Warehouse"/>
Address	<input type="text" value="2018 Castille Dr"/> <input type="text"/>
City	<input type="text" value="Palm Harbor"/>
Country	USA 
State	Florida 
Zip/Postal Code	<input type="text" value="34683"/>
Phone	<input type="text" value="8137850616"/>
Fax	<input type="text"/>
Email: 	<input type="text"/>
Url: 	<input type="text"/>
<input type="button" value="Undo Changes"/> <input type="button" value="Update Provider"/>	

- 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.

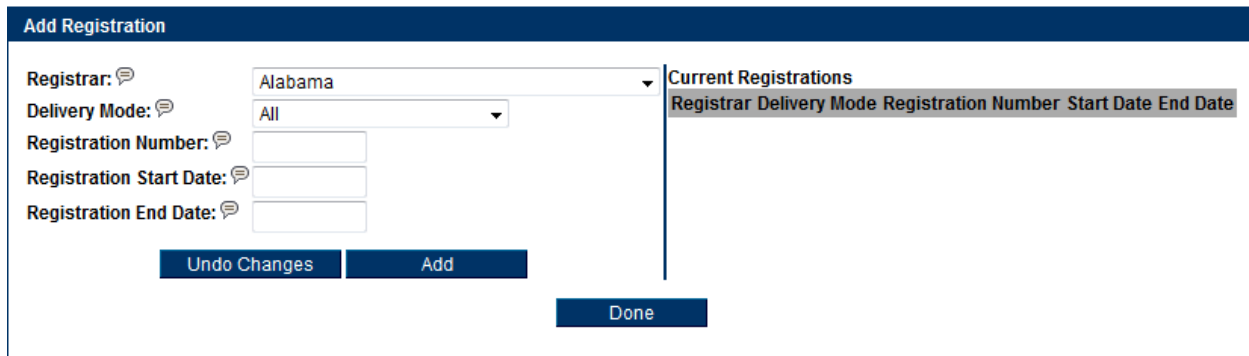


The image shows a confirmation dialog box titled "Delete Provider". The main text asks, "Are you sure you want to delete this provider?". At the bottom, there are two buttons: "No" and "Yes".

- 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.



The image shows the "Add Registration" form. It includes the following fields and controls:

- Registrar:** A dropdown menu currently set to "Alabama".
- Delivery Mode:** A dropdown menu currently set to "All".
- Registration Number:** A text input field.
- Registration Start Date:** A date input field.
- Registration End Date:** A date input field.
- Buttons:** "Undo Changes", "Add", and "Done".
- Current Registrations Table:** A table with columns: Registrar, Delivery Mode, Registration Number, Start Date, End Date.

- 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).

Add Registration

Registrar: ⓘ

Delivery Mode: ⓘ

Registration Number:

Registration Start Date:

Registration End Date:

Current Registrations

Registrar	Delivery Mode	Registration Number	Start Date	End Date
Tennessee	All	123456		

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

Provider Details

[edit](#) [delete](#)

Name Accounting Continuing Education Corporation

Address 2018 Castille Dr

City Palm Harbor

State Florida

Country USA

Zip/Postal Code 34683

Phone 615-828-2300

Fax

Email atongate@nasba.org

Url <http://www.nasba.org>

[add registration](#) [subscribe to registrar](#)

Registrar	Number	Delivery	Start Date	End Date
edit delete Tennessee	123456	All		

- 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.

Smart Pros

delete	Provider	Registrar	Number	Delivery Mode	Start Date	End Date
	SmartPros Ltd	Nasba	103186			
				Interactive Self-Study	1992-01-25	
				Group Internet-Based Live	2007-06-11	
				Group-Live	2009-08-31	

Add subscription

Provider:

Registrar ID:

- 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.

Provider Details

[edit](#) [delete](#)

Name Smart Pros

Address

City

State

Country USA

Zip/Postal Code

Phone

Fax

Email

Url

[add registration](#) [subscribe to registrar](#)

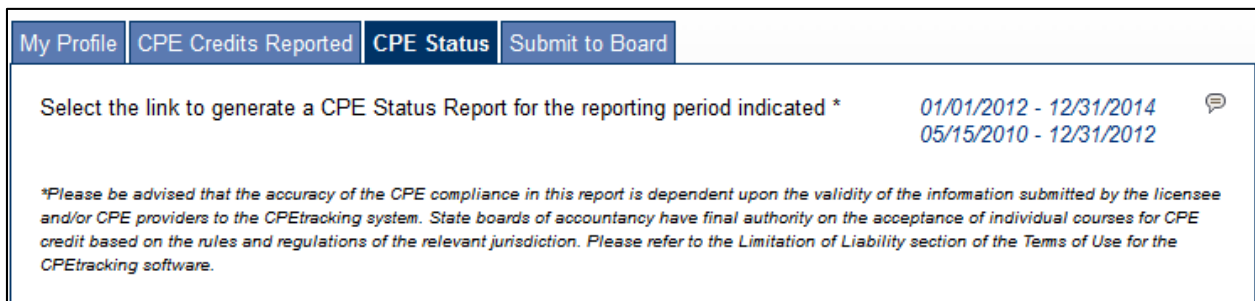
	Registrar	Number	Delivery	Start Date	End Date
subscription	Nasba	103186	Group Internet-Based Live	06/11/2007	
subscription	Nasba	103186	Group-Live	08/31/2009	
subscription	Nasba	103186	Interactive Self-Study	01/25/1992	

Click the [subscription](#) link and then the [delete](#) link to remove the NASBA Registry subscription from the user's provider.

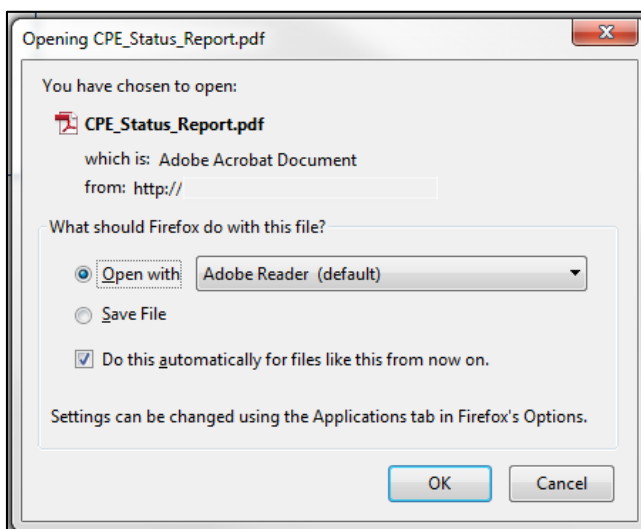
CPE Status



- 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.

Test Licensee - CPE Status Report
Missouri 01/01/2012 - 12/31/2014

Test Licensee's Missouri CPE Status for 01/01/2012 - 12/31/2014
 Last Update On: 02/03/2014 3:03:48 PM CST
 Audit Status: Not Audited

Licensing Information

License date: 05/15/2010
 License number: 112589

Requirements

	Required	Earned	Short
Total Hours	120	18	102
Total Hours in Year 1 (2012)	20	0	20
Total Hours in Year 2 (2013)	20	4	16
Total Hours in Year 3 (2014)	20	14	6
Ethics	5	5	0

Totals by Program

Total Hours	18
AICPA and State Society Programs	8
In-Firm Programs	2
Other Organizations' Programs	4
Self-Study	4

Totals by Subject Area

Total Hours	18
Accounting & Auditing	8
Non-Governmental	8
Auditing	8
Ethics	8
Behavioral Ethics	4
Regulatory Ethics	4
Personal Development	2
Personal Development	2

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.

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- The **Credits Earned** table comprises the second page of the report and displays courses where credits were granted toward requirements.

2

Test Licensee - CPE Status Report
Missouri 01/01/2012 - 12/31/2014

Credits Earned

Number	Title	Date	Provider/ Sponsor	National Registry #	Subject Area			Summary Total
					Audit	R. Ethics	Personal Dev	
AICPA and State Society Programs								
02-0314B	Auditing Update 2014	01/31/2014	University of Tennessee Conferences	108229	8	0	0	8
In-Firm Programs								
02-0314C	Time Management for Supervisors	02/01/2014	Buchanan, Raymer & Tongate, LLP	None.	0	0	2	2
Other Organizations' Programs								
02-0314D	Ethics for Accountants	12/01/2013	University of Tennessee Conferences	108229	0	0	4	4
Self-Study								
02-0314A	Workplace Harassment	01/15/2014	Buchanan, Raymer & Tongate, LLP	None.	0	4	0	4
Total Hours:					8	4	2	18

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- 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.

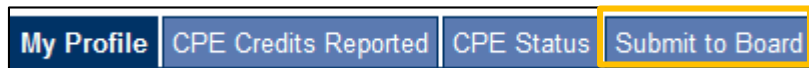
Test Licensee - CPE Status Report
Missouri 01/01/2012 - 12/31/2014

Credits Denied & Explanations						
Number	Title	Date	Provider/ Sponsor	National Registry #	Subject	(Credits Denied) Reasons
No Number	System Review	12/01/2013	None	None	Audit	(16) CPE credit not accepted by this jurisdiction.

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- 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.

A screenshot of the 'Submit to Board' page. At the top is a navigation bar with tabs: 'My Profile', 'CPE Credits Reported', 'CPE Status', and 'Submit to Board'. The 'Submit to Board' tab is highlighted. Below the navigation bar is a text area with a speech bubble icon in the top right corner. The text reads: '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.' Below this is a question: '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.' followed by radio buttons for 'Yes' and 'No', with 'No' selected. Below that is a red note: '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.' At the bottom of the text area are two links: 'Printable View' and 'Export Details'. At the very bottom of the screenshot is a blue button labeled '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.

Board Submission Confirmation

Are you sure you want to submit?

By clicking "yes" you are attesting that all records are accurate and complete to the best of your knowledge.
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.

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

Yes

No

- The Board Submission Confirmation screen offers the option to create a version of your transcript to save.
 - 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.
 - 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

Phone	E-mail
Toll free: 844-273-8722	CPEtracking@nasba.org

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