



## CPE Guidelines for Chapters

The Georgia Society of CPAs is charged with the responsibility to present educational programs which conform to the rules of the State Board of Accountancy. It is especially important that all administrative procedures are followed and that proper documentation is given to each participant of any CPE program. The chapter hours are entered in the Society's database and appear on each attendee's CPE transcript. As chapters are an organizational entity within the GSCPA, their CPE programs fall within the responsibility of the state society for proper documentation. All documentation must be submitted by the chapter before CPE credit can be given for the program. **The Society requires that any chapter CPE event of four or more CPE hours be submitted in advance to the Member Services Department for approval.**

The chapter must submit the Chapter CPE Review Form, speaker's biography and outline of presentation prior to an event with four or more hours of CPE. Failure to complete the form will result in CPE credit not being given. The Society must have the form on file in order to determine whether or not the program meets CPE guidelines.

Attendees at the chapter CPE program must be given the following:

1. A copy of the program materials prepared by the speaker
2. Biographical sketch of each speaker
3. CPE Verification of attendance form

After the CPE program the following items must be forwarded to Jennifer Poff in the Society office.

1. A copy of the program materials
2. The biographical material
3. Copy of the Verification of Attendance Form filled in by the attendees and **a list of names printed**

If you have any questions about these procedures please contact Jennifer Poff at 404-504-2939 or 800-300-8889 ext 2939, e-mail: [jpoff@gscpa.org](mailto:jpoff@gscpa.org).

### Programs that Qualify

The primary consideration in determining whether a specific program qualifies as acceptable continuing professional education is that it be a formal program of study which contributes directly to the professional competence of an individual licensed to practice by the State Board of Accountancy.

### General Requirements

1. An outline of the program is prepared in advance by the speaker and retained by the student.

2. The Program is conducted by a person whose formal training and experience qualify as a competent instructor. The way to substantiate the instructor's ability is to provide biographical information.
3. The program must be at least 50 minutes in length. Every 50 minutes of instructional time qualifies for one credit of CPE. If there is any fraction left over, you must round down. A record of registration and attendance is kept on file for presentation to the Board if necessary. This is provided by having the members sign in at the chapter presentation.
4. A certificate of attendance must be given to participants and a copy must be sent to the Society.
5. At the conclusion of the program, forward the following to Jennifer Poff at the Society office:
  - a. a copy of the outline
  - b. the biographical material
  - c. the legible list of participants and copies of the Verification of Attendance Forms

In order to fulfill the requirements mandated by the State Board of Accountancy, each attendee and program sponsor must have a copy of the outline and a Verification of Attendance Form (credit form) for their CPE records. Each person as well as the program sponsor should maintain documentation of the CPE event for five years. By sending the CPE document to the Society office, chapters do not need to maintain additional CPE attendance files. The GSCPA has Chapter Verification of Attendance Forms available for your meetings.