POLICY/PROCEDURE: Chapter CPE Event Reconciliation

USE: ☐Internal (Department Use Only) ☒External (TXCPA Staff Use) ☐ Both
VERSION: 1.0 (Last Updated 02/07/2022)
EFFECTIVE DATE: June 1, 2021
DEPARTMENT: Membership, Marketing & Communications
CONTACT: Rori Shaw, Manager, Chapter Operations

This policy/procedure has been created to provide guidance to TXCPA personnel and contractors. Failure to adhere to TXCPA policies and procedures may result in disciplinary action up to and including termination.

This procedure is applicable to all of the employees and contractors who use NetFORUM for the Texas Society of Certified Public Accountants (Society), Texas Society of Certified Public Accountants CPE Foundation (CPE Foundation), Texas Society of Certified Public Accountants Peer Assistance Foundation (Peer Assistance Foundation), Accounting Education Foundation of the Texas Society of Certified Public Accountants (AEF), Texas Society of Certified Public Accountants Political Action Committee (TXCPA-PAC), Texas Society of Certified Public Accountants Insurance Trust (Insurance Trust), and all other entities managed by the Society including managed chapters when applicable (collectively referred to as TXCPA).

This policy/procedure provides various guidelines to ensure that TXCPA personnel and contractors are using netFORUM in accordance with business operations. The policies and procedures outlined are intended to support an effective, adequately controlled, and safeguarded system.

- Verify attendance by reviewing the sign-in sheet for the specific course. This includes counting all signatures on the sign-in sheet.
- If a signature is missing, that person will be designated a "No Show." Write "No Show" in the signature line of that person.
- If an attendee arrived late or left early, mark, to the left of the name, the total number of hours they attended.
- After all attendees, no-shows and late arrivals/early departures have been verified on the sign-in sheet, open the event record.
- For each "No Show," from the event record, go to the *Registrants* tab.
  - Click on the pencil icon under *Actions* to the right of the no show's name.
  - Uncheck the *Attendance* box.
  - Click *Save.*
- Back in the event record, click *Edit* from the menu at the top, then select *CEU* from the drop-down menu.
  - For those marked as "No Show" on the sign-in sheet, go to the *Status* drop down menu and select *No Show*. In the *Credits* box, adjust to "0."
  - For those that arrived late/left early and whose hours need to be adjusted, go the *Status* drop down menu and select what applies (example: "Left Early"). In the *Credits* box, adjust to the hours on the sign-in sheet.
  - Click *Save* once all adjustments are entered.

- Back in the event record, click *Edit* from the menu at the top, then select *Edit Info* from the drop-down menu.
  - Scroll to the bottom of the page and check the *Event Closed* box. This course is now closed for any further editing.