Request For Course Approval For CPD Units (over 5)

Process, Responsibilities & Expectations

There are two streams available in the process:
1. For courses requesting approval for less than 5 CPD units
2. **For courses requesting approval for 5 or more CPD units**

Requests for more than 5 CPD units:

a) Select and complete the appropriate fillable PDF form.

b) You may digitally sign your request form or print a PDF copy that you sign and scan with package documentation for submission by email.

c) You may print or download a PDF copy for your records.

d) Combine the PDF request form and all supporting documents (event agenda, course outline, your method for verifying attendance and sample completion certificate) in this order into one PDF request package and save the package using the following naming convention: yyyy-mm-dd(date of request)_CourseName_PresenterFnameLname

   eg. 2021-01-01_MyNewCourseName_JaneJones

e) Recommendation: It is to recommended that you provide full, concise supporting documentation sufficient for the committee to review and make a decision. Do not add excessive window dressing. If you do not submit enough background details, your request could be denied for insufficient documentation and you will need to resubmit.

f) Additional Info: In addition to the standard required documentation (course/event outline, verification of attendance method, sample completion certificate), the CPD committee may request detailed course/event materials to assist in determining eligibility. We recognize that this represents your intellectual property and all committee members reviewing your request and

materials will be required to sign your Non-Disclosure Agreement (NDA) before proceeding. The CPD committee will provide link to a secure Sharefile folder for the upload of the materials so that we can maintain a level of confidentiality and security with your information.

g) Submit your request package by email to: CPD@cpbcan.ca with a subject line the same as your package filename as specified above.

h) Your request will be placed in the queue for the CPD committee for review at their next meeting.

i) The CPD Committee will review your request and make a decision based on the merits of your request application.

j) You will be notified of the CPD committee decision. If your request is denied at this point, you will be advised of the reason(s). This process could take a few months depending on the volume of requests that the committee needs to review.

PLEASE BE ADVISED: The CPD Committee is composed of CPB Canada member volunteers and the committee is not always able to meet monthly. Your patience is appreciated.

Request for Course/Event Approval for Continuing Professional Development (CPD) [more than five (5) CPD units]

(Please ensure your request is legible. All illegible requests/documents will not be reviewed, and will be returned to the requestor)

Course/Event Information:

Course Title: _____

Presenter/Host: _____

Presenter Email: _____

Presenter Phone: _____

Course Duration: _____   Maximum # of attendees: _____

Details/Description (must be a minimum of 95% educational content) (attach further if necessary)**:**

limit of 505 characters & spaces

Why do you believe this course/event should qualify for CPD? (attach further if necessary)

limit of 505 characters & spaces

Required Attachments to Include (attachments should be appended to this request and submitted as one PDF document)**:**

Course/Event outline or program

Detailed course/event materials (to be sent under separate cover upon the request of CPB Canada)

How this course/event attendance or participation is being verified to qualify as verifiable

Sample transcript or completion certificate to be issued to our member

Please submit your request in a filename format of: submissiondate_CourseName_PresenterFnameLname

(e.g. 2021-01-15_ TestBkkgCourse_JaneJones) and send to: cpd@cpbcan.ca

Date of Request: _____   **Signature:** _____

Determination (for CPB Canada use ONLY. All approvals are subject to review within 3 to 5 years to ensure content remains relevant)**:**

Approval for: # of Bookkeeping Skills & Business Development CPD units

# of Personal Development CPD units

Denied: Event does not qualify for CPD

Insufficient information or documentation

Explanation:

limit of 347 characters & spaces

CPD Committee initials: ____ ____ ____ ____   Committee Chair signature: _____