



## Request For Course Approval For CPD Units (less than 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 less 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

NOTE: It is 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.

- e) Submit your request package by email to: CPD@cpbcan.ca with a subject line the same as your package filename as specified above.
- f) Your request will be placed in the queue for the CPD committee for review at their next meeting.

- g) The CPD Committee will review your request and make a decision based on the merits of your request application.
- h) 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) [up to 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: \_\_\_\_\_

PresenterPhone: \_\_\_\_\_

Course Date(s): \_\_\_\_\_ 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 agenda
  - Course/Event outline or program
  - 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\_CourseTitle\_PresenterFnameLname  
(e.g. 2021-01-15\_TestBkkgCourse\_MarySmith) 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: \_\_\_\_\_