

CPE GUIDELINES AND REPORTING FORMS
(Updated August 2015)

- The Colorado State Board of Accountancy requires certain documentation to support continuing education credit.
- Speaker biography, course outline and/or handouts, participant sign in forms and participants' evaluations (form attached) to the Records Coordinator as soon as possible after the qualified meeting.

CPE Requirements

The Colorado State Board of Accountancy **DOES NOT ISSUE SPONSOR AGREEMENTS** to CPE providers.

As of January 1, 2004, the Colorado State Board has adopted the NASBA/AICPA CPE Standards. Colorado does not pre-approve courses or providers. If both the licensee and the CPE provider comply with the NASBA/AICPA CPE Standards, the continuing education will be accepted as meeting the CPE requirements for the Colorado State Board of Accountancy

Providers and certificate holders are responsible for following the NASBA/AICPA CPE Standards. Attached is a print out of the CPE Standards for your convenience.

Records Coordinator as of 7/1/17:

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COPAS - Colorado GUIDELINES for CPE

Accountants have several reasons for acquiring legitimate continuing education credits: to maintain a CPA license granted by the Colorado State Board of Accountancy, to qualify for membership in the COCPA and/or AICPA, and to maintain accreditation from COPAS as an Accredited Petroleum Accountant.

Each of the programs or organizations listed has their own requirements, including the number of credits which qualify an applicant to continue licensure, membership, or accreditation. Of the three, the Colorado State Board of Accountancy requires the most hours on an annual basis and defines most stringently the programs which qualify for credit. As such, the Colorado State Board of Accountancy rules will be used to define COPAS-Colorado guidelines for continuing education programs. A summary of the Colorado State Board of Accountancy Program Requirements for continuing education is below.

COPAS-Colorado must comply in two ways for their programs to qualify for CPE. First, the programs must meet the standards of the Colorado State Board of Accountancy; and, second, COPAS-Colorado must comply with the sponsor reporting rules. Each is summarized below.

STANDARDS	PROOF
Content: Contribute to the professional competence of the participant. Program content is current.	Outline, handouts
Instructor: The program is developed by a person qualified in the subject matter and in instructional design. Instructors should be qualified in both subject matter and teaching methods. "Qualification is presumed if the instructor has obtained sufficient knowledge of the material presented through formal training and experience."	Biography of Speaker including education and work background
Review: Programs are reviewed by another qualified person other than the preparer to ensure compliance with the standards.	Committee Chairman should sign off as reviewer
Level of Program: Program should specify level of program and prerequisite knowledge of participants.	Participant Sign-In Form, Evaluation Form
Facilities: Number of participants and physical facilities should be consistent with the teaching method specified.	Evaluation Form
Evaluation: All programs should include an evaluation.	Evaluation Form
Credits: Each "classroom" contact of 50 minutes of contact equals one CPE credit. A minimum of one CPE credit is required for each program.	Outline, handouts
REPORTING REQUIREMENTS (5 yr. Record Retention Requirement)	
Record of participation	Participant Sign-In Form
Outline of course	Outline
Date	Outline
Location	Outline
Instructor(s)	Outline
Number of Contact Hours	Outline