**CPE Process Step by Step**

**Pre-Approval Submission**

Requirement: Obtain COPAS approval prior to the newsletter deadline

Gather up the following information:

* Presentation Draft
* Presenter Bio
* Newsletter draft (advertising)
* any handouts

Fill out the Event Notification Checklist - Information on the form includes the following:

* Society/Committee Name (Example PASH Audit Committee)
* Date and Time
* Location
* Administrator (person who will be submitting the course documentation to COPAS, might be the co-chair but one person can be both presenter and administrator)
* Administrator email and phone
* Presenter name(s)
* Company of presenter
* Date presentation developed or updated
* Length of presentation
* Description of presentation
* Learning objectives
* Field of Study – usually specialized knowledge
* Program level – Basic

An example of a completed Event Notification checklist is included in the Toolkit.

Currently these go to Vanessa Galindo at the COPAS office - vanessa.galindo@copas.org

**Newsletter Submission**

Provide the newsletter announcement for your committee to the Publicity Committee after approval is obtained from COPAS.

**COPAS Event Packet**

COPAS will work with you to ensure your presentation and documentation are aligned with the CPE requirements. Once approved, you will receive a meeting packet containing the following documents:

* Class Number assigned by COPAS
* Approval Form for your Course
* CPE Certificate for your Course
* Blank sign in sheet
* Presentation Evaluation Form
* Return Documents Cover Sheet

**Before the Meeting**

* Prepare sign in sheets – you may copy your attendee list onto the COPAS provided sign in sheet or use your own, but you need to ensure that your sign in sheet contains the course number, the host (PASH), date, and location. If using the COPAS sheet you will want to add a yes/no column for whether the person is the voting representative for their company.
* Bring evaluation forms
* You may prepare CPE certificates in advance based on the meeting reservation detail or prepare them after the meeting and email them out.

**CPE Certificates**

You will need to provide attendees with CPE certificates including names.

* Verify meeting attendance with the sign in sheet.
* Verify that each person receiving CPE turned in an evaluation. If the certificates were prepared in advance, then “trade” the certificate for a completed evaluation. If not, either check off the names as the evaluations are turned in or ask participants to include their name on the evaluation for CPE credit.
* Distribute the CPE certificates at or after the meeting.

If your instructor needs a CPE Certificate, the COPAS office will issue one for that speaker. It is different than the one issued to attendees.

**Return Documents to COPAS**

Within 30 days of the presentation, use the Return Documents Cover sheet provided by COPAS and attach the following:

* Copies of sign in sheets
* Copies of evaluations
* Copies of certificates with names filled out