

**CPE GUIDELINES AND REPORTING FORMS**  
**(Updated July 2009)**

- 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 CPE Database Administrator 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 CE requirements for the Colorado State Board.

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.

**CPE Database Administrator as of 7/1/09:**

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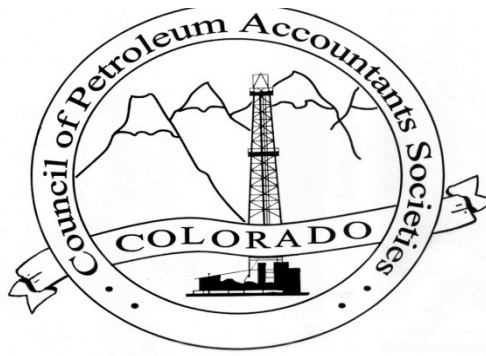
**C O P A S - C o l o r a d o**  
**GUIDELINES for CPE**

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

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

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

<b>STANDARDS</b>	<b>PROOF</b>
<b>Content:</b> Contribute to the professional competence of the participant. Program content is current.	Outline, handouts
<b>Instructor:</b> 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.
<b>Review:</b> Programs are reviewed by another qualified person other than the preparer to ensure compliance with the standards.	Committee Chairman should sign off as reviewer.
<b>Level of Program:</b> Program should specify level of program and prerequisite knowledge of participants.	Sign-In Form and Evaluation.
<b>Facilities:</b> Number of participants and physical facilities should be consistent with the teaching method specified.	Evaluation Form
<b>Evaluation:</b> All programs should include an evaluation.	Evaluation Form completed for program or series of programs.
<b>Credits:</b> Each "classroom" contact of 50 minutes of contact equals one CPE credit. Only full hours of CPE are credited.	Outline, handouts
<b>REPORTING REQUIREMENTS(5 yr. Record Retention Requirement)</b>	
Record of participation.	Participant Sign-In Form
Outline of course.	Outline
Date.	Outline
Location./	Outline
Instructor(s).	Outline
Number of Contact hours.	Outline



## Committee Chair Checklist

Continuing Professional Education Credit

The following is a list of the items committee chairs must accumulate and send to the COPAS CPE record keeper. **These documents are due to the CPE record keeper no later than 45 days after your meeting.**

### GENERAL INFORMATION:

Sponsor of Program \_\_\_\_\_

Date of Program \_\_\_\_\_

Location of Program Denver, Colorado **(Please do not change)**

NASBA Field of Study **(from below list, choose one)**

- a. Accounting & Auditing – AA \_\_\_\_\_
- b. Tax – Tax \_\_\_\_\_
- c. Specialized Knowledge - SK \_\_\_\_\_
- d. Personal Development – PD \_\_\_\_\_

Name of Program \_\_\_\_\_

Name of Presenter \_\_\_\_\_

### DOCUMENTS INCLUDED:

- \_\_\_\_\_ Presenter's Biography, Resume, or List of Credentials
- \_\_\_\_\_ Copy of Presentation Materials, Agenda or Meeting Minutes
- \_\_\_\_\_ Completed Evaluation Forms
- \_\_\_\_\_ Copy of any advertisement or announcement of the program
- \_\_\_\_\_ Copy of sign-up sheet listing attendees

**Signature of Committee Chair: Presentation material is current and relevant.**

Send Documents to: MAK-J Energy  
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