

DOCUMENTATION FOR RECERTIFICATION CREDITS

PLEASE READ CAREFULLY

ENSURE THAT ALL DOCUMENTATION MEETS THE FOLLOWING CRITERIA

1. The eligible activities can be in the field(s) of:
 - treasury / cash management
 - finance
 - accounting
 - ethics
2. The documentation of attendance or participation needs to include:
 - ✓ event sponsor name
 - ✓ date(s) of activity
 - ✓ title(s) of activity
 - ✓ length of activity OR number of eligible continuing education credit
 - ✓ representative name and phone number

All documentation you submit needs to indicate you completed the activity.
If you do not have documentation that meets these criteria, see #4.

3. Please **do not send** the following as documentation of your attendance:
 - original copies – please retain these for your records.
 - registration forms or e-mails
 - PowerPoint presentations
 - brochures
 - online printouts
 - receipts (paper or e-mail)
 - meeting announcements
 - invitations from sponsor
 - lunch or dinner menus

These do not show that the activity was completed.

4. In the event that the proper documentation is not available or you have not received proof of attendance:
 - A representative from the sponsoring organization for the activity can send an e-mail or letter confirming your attendance.

Please follow the steps below:

- All e-mails and/or letters need to be sent to kmccarthy@afponline.org.
 - The e-mail or letter needs to include:
 - ✓ representative name and phone number
 - ✓ sponsor organization name
 - ✓ date(s) of activity
 - ✓ title(s) of activity
 - ✓ length of activity OR number of eligible continuing education credit
- ▶ There is no guarantee that the sponsor of the event will be available to verify your attendance or have the ability to do so. There is nothing AFP can do if the sponsor of the event cannot verify your attendance.

CTP/CCM Recertification Types

- A. AFP Learning System: Treasury **Maximum CE: 18**
▪ Certificate of completion
- B. AFP Exchange Quizzes **Maximum CE: Unlimited**
▪ E-mail/ letter from AFP Education Department indicating successful completion
- C. College and University Courses **Maximum CE: 12**
▪ Copy of course transcript indicating a passing grade
- D. Live events - Conferences, Seminars, Workshops **Maximum CE: Unlimited**
▪ Certificate of completion

❖ For the AFP Annual Conference, there is a CTP/CCM/CPE Recertification Credit Form in the back of the program book. This can be submitted along with the program matrix highlighting the sessions you attended.
- E. Independent Study **Maximum CE: Unlimited**
▪ Certificate of completion

❖ Any documentation submitted should be signed by an official of the sponsoring organization or educational institution.
- F. Licenses and Certifications **Maximum CE: 12**
▪ Copy of the certificate or license including date earned
- G. Published Articles and Books **Maximum CE: 12**
▪ Articles - copy of publication cover AND index indicating length of article (number of pages)
▪ Book - copy of the title page AND verso with publication date.
- H. Teleconferences/Webinars/Webcast **Maximum CE: Unlimited**
▪ Certificate of Completion

❖ For AFP's Virtual Education Series, AFP has records. Please provide date and title.
- I. Speakers/Presenters & Academic Lecturers **Maximum CE: 12**
▪ Copy of program indicating or listing the (1) date, (2) presentation title, (3) description of presentation, and (4) your name as the presenter
▪ For courses taught at colleges/universities to undergraduates/graduates, provide copy of syllabus and course title and description from course catalogue for corresponding semester

❖ You do not get credit for presentations given as part of your everyday job responsibility.
- J. Thesis/Dissertation **Maximum CE: 12**
▪ Copy of title page AND copy of transcript
- K. AFP Volunteer Service (Regional/National) **Maximum CE: 4/6**
▪ Copy of program/publication listing your name
OR
▪ Signed letter from officer of organization or committee chair