

Program Continuing Education With International Foundation Coordination

The International Foundation of Employee Benefit Plans can provide assistance with submission of programs to various organizations and state insurance programs for continuing education (CE) credits. The following are guidelines.

Fees

The International Foundation will bill the Chapter for the fees below:

- \$50 fee Administration
- \$10 fee Per credit hour, per organization/state submission

Example: A Chapter would like a two-hour program to receive CE credits through California insurance and HRCI. The total cost to the Chapter for the Foundation to administer this would be:

\$50	Administration fee
\$20	CA insurance
\$20	HRCI
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\$90	TOTAL

Services Included

- International Foundation submits program information to organizations/states your Chapter requests.
- International Foundation provides sign-in/sign-out sheet(s) to the Chapter one week before the event.
- International Foundation submits sign-in/sign-out sheet(s) to the CE providers.
- International Foundation provides CE certificates to the Chapter for distribution to applicable attendees (to be provided as separate PDFs per person, in one email to a Chapter representative).

Required Information – *must be received at least five weeks prior to the event for SHRM or HRCI (75 days for insurance)*

The following items are needed by Foundation staff in order to provide this service. Please provide all information in one email to the International Foundation in order to ease administrative burden and streamline the process.

1. Program title
2. Brief description of program
3. Timed outline of program
4. Speaker bio(s)
5. Program location/address
6. Date and time (start and end) of event
7. Organizations/states with whom Foundation staff should submit CE requests (SHRM, HRCI, etc.)
8. Number of CE credits being requested (in full one-hour increments)
9. Chapter contacts for International Foundation staff (please include name, phone number and email address for each contact).
 - a. Whom to contact for questions regarding CE submission requests
 - b. Whom to contact to inform the Chapter of CE approval
 - c. Whom to email the sign-in/sign-out sheet to five days before event
 - d. Who will provide the sign-in/sign-out sheets back to the Foundation within two days after event
 - e. Whom to email the CE certificates to for distribution to attendees

**APPLICATION REQUIREMENTS CAN CHANGE.
THE FOUNDATION WILL INFORM YOU IF ADDITIONAL REQUIREMENTS ARE INSTITUTED.**

To obtain insurance CE credit, a program must first be submitted to the provider’s (in this case the International Foundation) “home state.” A home state is the state where the provider is located—in this case, Wisconsin. Wisconsin requires at least 30 days to review a program. This means that if we have not received a response, we cannot inquire about the status of the application until 30 days have passed from when it was submitted. Once a program is approved by Wisconsin, we can then submit it to the other “reciprocal” states. Those states each require at least 30 days before a status check can be made. Once a state approves a program, a course offering must be entered. Course offerings must be entered at least ten-20 days before a course occurs. Therefore, **75 days is needed for insurance CE credit for all chapters except for Milwaukee**, which needs 45 days to meet these deadlines.

Also note: Reciprocity does NOT mean that just because the home state approves a course, the reciprocal states will as well. Reciprocity has to do with the ability to apply for credit. States can deny a course even if it was approved by the home state if it does not meet their requirements.

Chapter	State	Speaker App?	Special Notes?
Baltimore	Maryland	Yes. Also need submit PDF bio with app.	Must report within ten days of end of program.
Capital/D.C.	DC	No	Must report to D.C. within 48 hours of end of program, so need attendance information quickly.
Carolinas	North Carolina	No	Must report within 15 days of end of program.
Carolinas	South Carolina	Yes. See application—One of the items under question 2 is required to be attached. They generally seem to prefer option C. Social Security number is required.	\$25 fee for each instructor (can be paid via CC).
Central Indiana	Indiana	No	Must report within 14 days of end of program—They are fairly strict with that.
Central Ohio Cincinnati Dayton (SW Ohio) Northeast Ohio	Ohio	No	Must report within 15 days of end of program.
Central Pennsylvania Greater Philadelphia Greater Pittsburgh	Pennsylvania	Yes. See application—SSN required.	
Chicago	Illinois	No	
Colorado	Colorado	No	
Dallas/Fort Worth Houston	Texas	No	
Greater Boston	Massachusetts	No	Must report within ten days of end of program.
Kansas City	Kansas	No	
Kansas City	Missouri	No	

Los Angeles Northern California Orange County	California	Yes. See application—SSN required.	
Middle Tennessee	Tennessee	No	
Milwaukee	Wisconsin	Yes. Use application on the International Foundation dashboard—Include name, address, email, PDF of bio.	Must report within ten days of end of program.
Nebraska	Nebraska	No	Must report within ten days of end of program.
New York Metro	New York	Yes. Fill out and sign the eight-page application—Make sure to include SSN and employer contact name (HR or higher up). Mail ORIGINAL (cannot send a printed-out version) with individual checks (\$50 check for each instructor) to New York.	\$50 check needed for each instructor.
NE/Central Florida Tampa Bay	Florida	Instructor must first apply to Florida to be an instructor (must provide SSN). Upon receiving instructor ID number, instructor must provide the number to the International Foundation at least 20 days before the course is scheduled to begin. <ol style="list-style-type: none"> 1. Go to the MyProfile login page at https://dice.fldfs.com/public/pb_index.aspx. 2. Select Create Account. 3. Select Instructor on the drop-down menu. 4. Enter current instructor ID and date of birth, if applicable, or select New Instructor Application. 5. Follow screen prompts to complete the application. 6. Submit the application. <p>Note: Instructors must meet the requirements listed in 69B-228.060 FAC for Continuing Education</p>	Must report within 21 days of end of program—Strict.
Northern New Jersey	New Jersey	No	Must be reported within 14 days of end of program.
Pacific Northwest	Washington	No	Must be reported within ten days of end of program.
Pacific Northwest	Oregon	No	Must be reported within 15 days of end of program.

Webinars require a way to prove attendance. To meet the most strict standards, programs use a Zoom report showing whether individuals were logged in for the FULL program (cannot arrive late or leave early); attendees must also respond to at least three (3) polling questions per hour of education. Polling questions do not have to be quizzes of material, just something the attendee clicks to indicate they are at their computer and paying attention. They must occur at random intervals and cannot be announced in any way. **If even one question is not answered, NO credit is earned.**

Attendees have struggled with answering all three questions each hour and being logged in for the full time, resulting in no credit earned. Significant education on this requirement will need to occur.

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