

## Program Continuing Education With International Foundation Coordination

The International Society of Certified Employee Benefit Specialists (ISCEBS), in partnership with, the International Foundation of Employee Benefit Plans (The Foundation) can provide assistance with submission of programs to various organizations and state insurance programs for continuing education (CE) credits. The following are guidelines on how to utilize this service:

### Fees

The 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.

\$50	Administration fee
\$20	CA insurance
\$20	HRCI
<b>\$90</b>	<b>TOTAL</b>

### Services Included

- The Foundation submits program information to the organizations/states your Chapter requests.
- The Foundation provides sign-in/sign-out sheet(s) to the Chapter one week before the event.
- The Foundation submits sign-in/sign-out sheet(s) to the CE providers.
- The Foundation provides digital CE certificates to the Chapter for distribution to applicable attendees.

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

The following items are needed by the Foundation staff. Please send all information in one email.

1. Program title
2. Brief description of program
3. Timed outline of program
4. Speaker bio(s) or resume(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. Chapter contacts (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 one week before event
  - d. Who will send the sign-in/sign-out sheets back to the Foundation within two days of event
  - e. Whom to email the CE certificates to for distribution to attendees

### Virtual Programs

As everyone is in a different location, webinars require a way to prove attendance. The Zoom platform must be used to host your webinar. Attendees are required to be logged in for the FULL program (cannot arrive late or leave early) and must respond to at least three (3) polling questions per hour of education. Polling questions do not have to be quizzes of the webinar content, 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.**

## Insurance Credit Process

To obtain insurance CE credit, a program must first be submitted to the “home state”—the state where the provider is located. For the International Foundation, this is Wisconsin. Wisconsin requires at least 30 days to review a program. If we have not received a response, we cannot inquire about the status of an application until at minimum 30 days from submission. If a program submitted by the International Foundation is approved by Wisconsin, it can then be submitted to the state a chapter is requesting credit in/for, the “reciprocal” state. Each reciprocal state requires at least 30 days to review a program. **A minimum of 75 days is required for insurance CE credit for all chapters except Milwaukee, which requires 45 days, to meet deadlines.**

**Note:** Reciprocity does NOT mean that a state will automatically approve a submission just because the home state has approved the course. Reciprocity only refers to the sharing of submission materials, and not guaranteed approval. States can deny a course approval regardless of its approval in another state.

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

Chapter	State	Speaker Application?	Special Notes
Baltimore	Maryland	Yes. Also need to submit a PDF file of bio with application	Must report within ten days of end of program.
Birmingham Area	Alabama	No	
Capital	D.C.	No	Must report to D.C. within 48 hours of end of program, so attendance information is needed 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 two is required to be attached. They generally prefer option C. Social Security number is required.	\$25 fee for each instructor
Central Indiana	Indiana	No	Must report within 14 days of end of program—They are fairly strict with this.
Central Ohio Cincinnati/Dayton Northeast Ohio	Ohio	No	Must report within 15 days of end of program.
Central Pennsylvania Greater Philadelphia Greater Pittsburgh	Pennsylvania	Yes. See application—SSN is required.	
Chicago	Illinois	No	
Colorado	Colorado	No	
Dallas/Fort Worth Houston	Texas	No	
Detroit West Michigan	Michigan	Yes. See application—SSN is required.	

Georgia	Georgia	Yes. Also need to submit a PDF file of bio with application.	
Greater Boston	Massachusetts	No	Must report within ten days of end of program.
Kansas City	Kansas	No	
Kansas City St. Louis	Missouri	No	
Los Angeles Northern California Orange County	California	Yes. See application—SSN is required.	
Louisville	Kentucky	Yes—Need PDF file of bio	
Middle Tennessee	Tennessee	No	
Milwaukee	Wisconsin	Yes. Need name, address, email, and PDF file of resume (bio not accepted).	Must report within ten days of end of program.
Nebraska	Nebraska	No	Must report within ten days of end of program.
New York Metro Albany	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.
Northeast/ 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"> <li>1. Go to the MyProfile login page at <a href="https://dice.fldfs.com/public/pb_index.aspx">https://dice.fldfs.com/public/pb_index.aspx</a>.</li> <li>2. Select <b>Create Account</b>.</li> <li>3. Select <b>Instructor</b> on the drop-down menu.</li> <li>4. Enter current instructor ID and date of birth, if applicable, or select <b>New Instructor Application</b>.</li> <li>5. Follow screen prompts to complete the application.</li> <li>6. Submit the application.</li> </ol> <p><b>Note:</b> Instructors must meet the requirements listed in 69B-228.060 FAC for Continuing Education.</p>	Must report within 21 days of end of program—This is a strict deadline.
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.
Richmond	Virginia	Yes—Need PDF file of bio.	Must be reported within ten days of end of program.
Twin Cities	Minnesota	No	Must be reported within ten days of end of program.

### SAMPLE PROGRAM AGENDA

Program Title  
Date and Time and Location

Description: Short description of the program.

Agenda:

9:00-10:00 a.m. ....60 Minutes

#### Part 1: Gateway to Self-Funding: Stop Loss Group Captives

1. Group Captives—What, Why, How Who .....10 Minutes
2. The Market Climate .....10 Minutes
3. Stop Loss Group Captives .....20 Minutes
4. Financial Scenarios .....10 Minutes
5. Other Considerations .....5 Minutes
6. Next Steps.....5 Minutes

10:00-10:15 a.m. ....Break

10:15-11:45 a.m. ....90 Minutes

#### Part 2: Fundamentals of Stop Loss Insurance: Providing Employee Benefit Brokers and Consultants Basic Understanding of Stop Loss Insurance

1. The general concept of self-funding vs fully insured .....15 Minutes
2. Current market trends toward self-funding and within stop loss contracts.....30 Minutes
3. Basic types of stop loss coverage, nuances within contracts and advanced risk sharing options.....30 Minutes
4. Points to consider in vendor selection process .....15 Minutes