

UPLOAD CPE SUMMARY FEATURE

WHAT IS THE UPLOAD CPE SUMMARY FEATURE?

CPAs can populate their completed CPE to the CPE Tracker by entering the courses to a preformatted CSV file and then uploading the file. The other option is to individually add each CPE course to their CPE Tracker.

INSTRUCTIONS

Obtain the .csv Template

1. Access your [online services](#).
2. Select “CPE Tracker” from the options, then click on your name under “CPE Reporting Period.”
3. Select “Upload CPE Summary” in the upper right-hand corner.
4. Select “Download CPE Summary Template” from the pop-up window.
5. Save the file to your computer.

Create Your .csv CPE Spreadsheet

1. Enter your CPE courses in the CPE Summary Template.
 - a. Rows 1 and 2 are already populated with information. DO NOT MODIFY ANYTHING IN THESE ROWS. Any modifications to the text in the first two rows will result in a failed upload.
 - i. Row 1: Provides a short description of what type of data is accepted.
 - ii. Row 2: Provides the column headers that match the data fields in the CPE Tracker.
 - b. Rows 3 and below: Enter your CPE courses. Follow these specific requirements carefully or your .csv file will not upload.
 - i. Do not include any commas in your spreadsheet.
 - ii. Entries in the “Role” and “Credit Type” columns must exactly match one of the options listed in Row 2 of the column.
 - iii. CPE hours can only be entered in increments allowed by Board Rule.
 - iv. Please see the Requirements chart below for more details.

2. Save your file making sure it is still in the .csv format.

Upload Your .csv CPE Spreadsheet

1. Access your [online services](#).
2. Select “Upload CPE Summary” in the upper right-hand corner.
3. Select “Upload Files” from the pop-up box.
 - a. Attach or drag and drop your .csv file.
 - b. Click the “Done” button at the bottom right-hand corner of the box.
4. Once the upload is complete, you will receive:
 - a. A green box if your CPE upload was successfully uploaded. Your CPE will be populated into the CPE tracker.
 - b. A red box if your CPE upload was not successfully uploaded. The box will describe the error.

Correct Error Messages

1. If you receive a red error message at the top of the screen, none of the CPE in your file will upload to the CPE Tracker.
 - a. The error message should indicate the issues, but at times they may be hard to navigate.
 - b. You may refer to the Requirements chart below for help in finding what information in your .csv file is incorrect.
2. The most common errors to check for are:
 - a. Commas in the course titles or provider names – Your file cannot have any commas in it.
 - b. CPE hours entered in invalid increments – Be sure that your CPE hours are only in increments authorized by Board Rule at the time the CPE was completed.
 - c. File type error – UTF-8 Error (BLOB 8) – If you receive this error, correct it by:
 - i. Open your CPE Summary Template
 - ii. File > Save As
 - iii. Save as type: “CSV UTF-8 (Comma delimited)”
 - iv. Select “Save”
3. Once you have corrected the issues, attempt to upload the file again.

Attach Your Certificates of Completion – This is optional unless you are requesting a CPE extension.

1. Access your [online services](#).
2. Select “CPE Tracker” from the options, then click on your name under “CPE Reporting Period.”
3. Scroll down to the CPE section which lists your courses.
4. Select View All at the bottom to see the complete list.

5. Select the CPE name of the appropriate course.
6. Click the Upload Files link at the right side of the page and add your file.
7. Select Done
8. Close that course and return to your course listing to repeat the steps as needed.

Requirements

Completion Date	Format date: MM/DD/YYYY
Role	Key in one of the following options (Text must match exactly): <ul style="list-style-type: none"> • Student • Instructor/Developer • Published Authorship • ACB Board Service
Provider	Add the Provider Name (Do not enter commas)
Credit Type	Key in one of the following options (Text must match exactly): <ul style="list-style-type: none"> • Technical • Non-technical
Course Title	Enter the Course Title (Do not enter commas)
Number of Hours	Enter the number of hours. CPE Values are only accepted in the following formats: <ul style="list-style-type: none"> • Nano learning – in tenths of hours starting with 0.2 hours (0.2, 0.3, 0.4, 0.5, 0.6, 0.7, 0.8, 0.9) • Standard CPE – Prior to January 1, 2024 – in half-hour increments after the first full hour is earned (1.0, 1.5, 2.0, 2.5, etc.) • Standard CPE – On or after to January 1, 2024 – in tenths of hours increments after the first full hour is earned (1.0, 1.1, 1.2, 1.5, 2.0, etc.)
Comments	Any Comments on CPE (Do not enter commas)
Washington State Board Approved Ethics course entry	You must enter your ethics course using the “Add WA Ethics” button. <ul style="list-style-type: none"> • Credits will not properly be applied if you upload it. • If it is included with your upload, please go into your CPE Tracker and delete the entry from your summary. Then re-enter it using the “Add WA Ethics” button at the top of the page.
Do not upload your summary more than once, because this will duplicate all entries	Once you have uploaded and received a success notice (green check mark), select “Done”. Then, go back to your CPE Tracker and verify your CPE is all listed. If you take additional CPE, do not re-upload a file with courses that you have already added to the CPE Tracker. If you do, it will add duplicate courses, and you will need to manually delete each of them. Redownload the Summary Template and add the new course(s) to the new document and upload the new file.