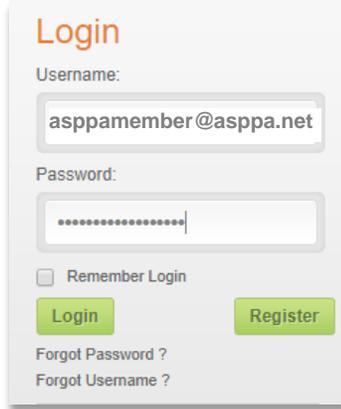


## CE Summary and Self-Reporting Job Aid

Below are instructions for using the new CE Summary and self-reporting tool:

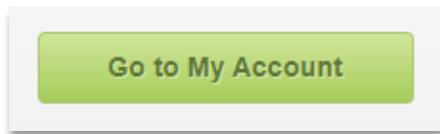
1. Click **“Login”** or **“My Account”** from the top menu of napa-net.org, or click here: <https://asppa.personifycloud.com/PersonifyEbusiness/Home>
2. Enter your username and password to gain access to your My Account page. Use the **Forgot Username?** Or **Forgot Password?** links to find your username or reset your password.



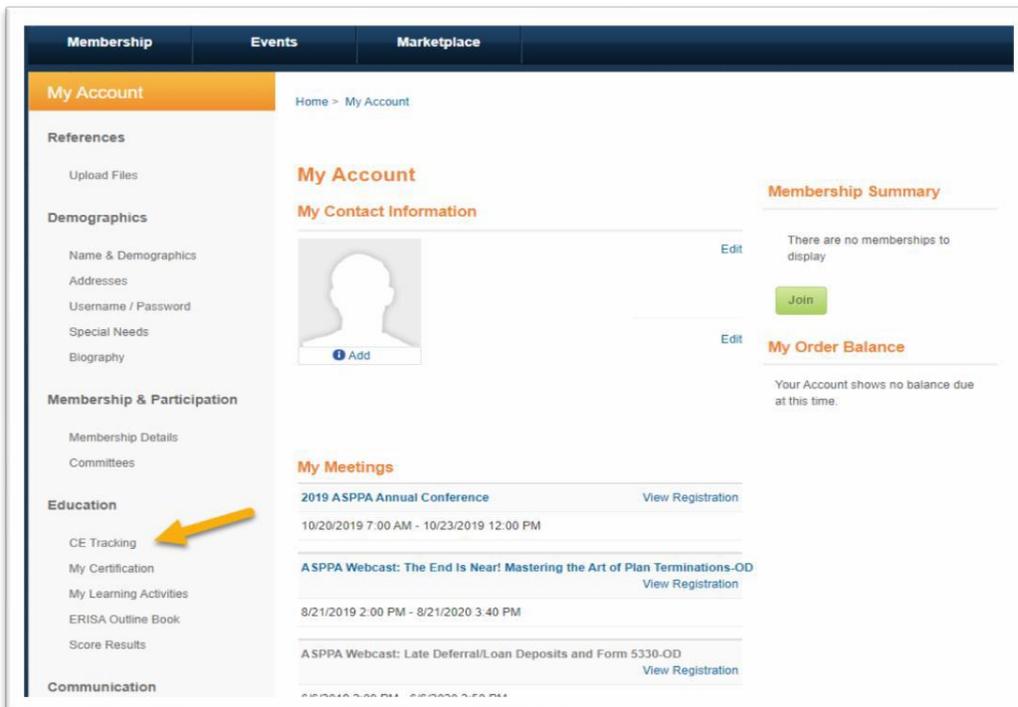
The screenshot shows a login form with the following elements:

- Login** (orange heading)
- Username:** Input field containing "asppamember@asppa.net"
- Password:** Input field with masked characters "....."
- Remember Login
- Login** (green button)
- Register** (green button)
- [Forgot Password ?](#)
- [Forgot Username ?](#)

3. Once you are logged in, click the **“Go to My Account”** button or click the **“My Account”** link on the top menu.



4. On the My Account Page, navigate to the left side bar and look for the heading **“Education”**. Under the **“Education”** heading look for the link for **“CE Tracking”**.



The screenshot shows the "My Account" page with a navigation menu on the left and a main content area on the right. The navigation menu includes sections like References, Demographics, Membership & Participation, Education, and Communication. The Education section is highlighted with a yellow arrow pointing to the "CE Tracking" link. The main content area displays "My Account" information, including contact information, membership summary, and a list of meetings.

Membership	Events	Marketplace
<b>My Account</b>		
<b>References</b>		
Upload Files		
<b>Demographics</b>		
Name & Demographics		
Addresses		
Username / Password		
Special Needs		
Biography		
<b>Membership &amp; Participation</b>		
Membership Details		
Committees		
<b>Education</b>		
CE Tracking		
My Certification		
My Learning Activities		
ERISA Outline Book		
Score Results		
<b>Communication</b>		

**My Account**

Home > My Account

**My Contact Information** Edit

**Membership Summary**

There are no memberships to display

**Join**

**My Order Balance**

Your Account shows no balance due at this time.

**My Meetings**

<b>2019 ASPPA Annual Conference</b> View Registration
10/20/2019 7:00 AM - 10/23/2019 12:00 PM
<b>ASPPA Webcast: The End Is Near! Mastering the Art of Plan Terminations-OD</b> View Registration
8/21/2019 2:00 PM - 8/21/2020 3:40 PM
<b>ASPPA Webcast: Late Deferral/Loan Deposits and Form 5330-OD</b> View Registration
ASPPA Webcast: Late Deferral/Loan Deposits and Form 5330-OD

5. Click the “CE Tracking” link under the “Education” heading or click here:

<http://asppa.personifycloud.com/PersonifyEbusiness/My-Account/New-CE-Summary>

6. This is the New CE Summary page. Review CE Credit totals located under **Outstanding** and **Earned** column headings. Note the **Complete By** date.

Organization/Type	Earned	Outstanding	Complete by
ASPPA Continuing Education	0	5	12/31/2019
ASPPA Ethics	0	1	12/31/2019

7. When you are ready to self-report CE credits, click the “**Manage Self-Reported Credits**” link above the table or “**Self-Reporting Credits**” link from the left side bar.

Self Reporting Credits  
ASPPA CE policy  
NAPA CE policy  
CE Reports

**New CE Summary**

Manage Self Reported Credits

Organization/Type	Earned
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8. Click “**Add**” to add a self-reported program.

Membership Events Marketplace

My Account

Home > My Account > Self Reporting Credits

**Self Reporting Credits**

Self-Report CE Credit

Id: 000000579153

ADD

Date	Transcript Activity Description	Ethics	Relevant Topic	#Credits	Action
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9. Fill in all fields and choose a CE type – **Professional or Ethics**.

Professional  Ethics

Transcript Activity Description  (required)

Dates  (required)

# of CEs  (required)

Save Cancel

10. If you need additional information about which CE type is appropriate for your program, mouse over the **i** icon for more information.
11. When you have entered the data for your CE program, click the **“Save”** button.
12. When saved, you will see a summary of the entered program information. Review it and use the **“Edit”** or **“Delete”** buttons to modify or remove the program you entered.

Date	Transcript Activity Description	Ethics	Relevant Topic	#Credits	Action
10/1/2019	Professional	N	N	1.00	Edit Delete

13. Click **“New CE Summary”** on the left side bar and check to verify that the **“Earned”** and **“Outstanding”** credits changed according to what you entered. Here is an example of an updated CE Summary with one (1) CE reported:

Organization/Type	Earned	Outstanding	Complete by
ASPPA Continuing Education	1	4	12/31/2019
ASPPA Ethics	0	1	12/31/2019

14. To review a report that can be printed or saved to your computer, Select **“CE Reports”** from the left side bar. Enter custom dates and click **“Search”** or click **“Run for Current CE Cycle”** to run the report for the current cycle.

### CE Report

Date Range: From:   To:  

Select the **“ASPPA CE Policy”** link on the left side bar to review our policy and guidelines.

Need additional support or have questions?

Call 703.516.9300 or email [CustomerCare@asppa-net.org](mailto:CustomerCare@asppa-net.org)!