CBDM®

Certifying Board for Dietary Managers

The credentialing agency for

Association of Nutrition & Foodservice Professionals ✐**NFP**®

CE Provider Portal
Instruction Manual
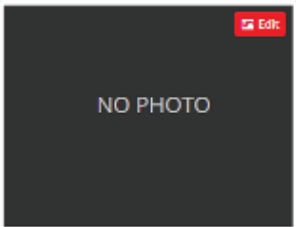
TABLE OF CONTENTS

CE PROVIDER PORTAL
ACCOUNT SETUP

1. Read the entire CBDM Prior Approval Handbook.

2. All applications for CBDM Prior Approval must be submitted via the CE Provider Portal. Paper applications will be returned with directions to complete the Account Set-Up application.

3. Download the Account Set-up Application here. There will be an option on this application to apply for the Unlimited CE Provider/Renewal program. For all non-profit organizations, an IRS Determination letter will be required with the Account-Set Up Application.

4. Only one person from an organization will have access to the CE Provider Portal. Access is granted to the primary contact through their personal account with ANFP.

5. Any changes to an organization's primary contact must be submitted to ANFP, so the new primary contact's personal account can be associated with the organization's CE Provider Account and granted access.

6. A login and password will be sent to the primary contact once the Account Set-Up Application has been processed.

7. Your password can be changed in your online account under My Information, Change My Password.

8. If your individual password is forgotten or if you are unsure if your organization already has an account, e-mail priorapprovals@CBDMonline.org and ANFP staff will contact you.

UNLIMITED CE PROVIDER
RENEWAL PROGRAM

The Unlimited CE Provider/Renewal Program is an all-inclusive package providing organizations the ability and flexibility to request an unlimited number of CE programs to be prior approved on demand for a period of one year. Each program must be submitted through the CE Provider Portal and will be automatically approved with required supporting documentation. All unlimited providers will be subject to an audit process. See Appendix G for details.

All Prior Approved programs are assigned a unique Prior Approval number that is valid from the date of issuance, expiring 12/31 of the third year and remains active as long as the Unlimited CE Provider annual fee is paid. Annual invoices are created in October and are due by 12/31 of the current year.

After the third year of approval, programs become renewable for an additional three years, allowing the sponsoring organization to renew the education by re-applying for approval through the CE Provider Portal and providing required documentation for the program. The Unlimited CE Provider/Renewal Program includes new upcoming programs and covers previously approved programs up to a maximum of six years.

To become an Unlimited CE provider, complete the Account Set-Up Application and provide payment information.

LOGGING IN AND SUBMITTING THE
PRIOR APPROVAL APPLICATION

1. Due to the large number of Prior Approval applications received, we request a minimum of eight weeks advanced notice to allow time to review and process applications, address any corrections and secure missing information. Late fees will apply to applications submitted less than 30 days in advance.

2. Once your personal account has been set up and linked to the CE Provider Portal, you are able to login and submit online applications. To log in:

   - Visit www.ANFPonline.org

   - Select **Login** on the top-right of the page

   - Enter your login and password

   - Select Login

   - To view your personal record page, at the top of the screen, next to your name, select **View Profile**.

   - To access the CE Provider Portal, select **CE Provider Home**.

3. On the CE Provider Home page, you will see all current, past, retired, & denied programs submitted by your organization will be listed. Select **Add Program**. This opens a new application.

4. To complete the application, start by adding the program name, selecting the program type and number of CE, and adding the speaker/author. If there is more than one speaker/author, simply type "Various."

5. There is a checklist of all the information you will need to submit for each program type on the following pages. You will need to complete the prior approval application in one sitting. There is no way to save a partially completed application and return to it later.

6. Continue by uploading the required documentation for the program type selected.

speaker document:	Choose File	bios.pdf	required
objectives document:	Choose File	Learning Objectives.pdf	required
agenda document:	Choose File	timeline agenda.pdf	required
eval document:	Choose File	Evaluation.pdf	required
certificate document:	Choose File	certificate.pdf	required

All documents are required. If you attempt to save with this section incomplete, you will need to re-enter/upload all documents.

7. Next you will need to select the Competency Level and Topics. Up to four competency topics can be selected. An explanation of Competency Levels and Topics can be found in the CBDM Prior Approval Handbook and within this guide.

course competency level: **Multiple Levels**

course topic:
- Sanitation and Safety - Protect Food in all phases of preparation using HACCP Guidelines
- Sanitation and Safety - Manage physical facilities to ensure compliance with safety and sanitation guidelines
- Business Operations - Manage a budget
- Business Operations - Prepare specifications for capital purchases

8. In the notes field, CE Providers have the opportunity to advertise and explain what the program will offer those individuals who attend. Programs with CBDM Approval are listed on the Find CE section of the ANFP website. CDM, CFPPs use Find CE to search for continuing education opportunities prior approved by the Certifying Board for Dietary Managers.

9. Enter the dates of your program. If a one-time live event, the city, and state will need to be entered. Add registration contact information - name, phone number, registration website, and sponsor.

   • All areas must be completed

   • The registration phone number field allows only 10 digits. Do not enter /, -, or extensions.

   • If there is no sponsor, enter n/a or your own organization's name.

notes: Join us for two days of unsurpassed education sessions, networking events and inspirational speakers for today's professional.

| Start Date	End Date	City	State	Reg Name	Reg Email	Reg Phone	Reg Website	Sponsor	
05/07/2020	05/08/2020	St. Louis	MO	Jenny Rios	jsrios@anfponline.org	8003231908	www.ANFPonline.org	ANFP	x

10. To submit your completed application, scroll to the bottom of the page and click "Add."

   • Unlimited CE Provider applications will automatically be approved. The application will fall in Current CE alphabetically. Locate the program and find the prior approval number listed.

   • For providers without Unlimited status you will be directed to the online payment system. Payment must be made with credit card. You will receive an e-mail notifying you of your application submission and payment.

   • If payment is not processed, you will be contacted by ANFP to make payment within 7 business days. To make payment login to the CE Provider Portal, locate the application under Programs Pending Payment and click the "pay now" button next to the application. Applications will not be reviewed without payment and will be discarded after 7 business days.

Programs Pending Payment +

|	Submitted	Program Title	Program Type	General	Sanitation	Food Show	Ethics	
+	3/12/2020	2020 LeadingAge Indiana Spring Conference and Trade Show	Seminar/Meeting	10.00	0.00	0.00	0.00	pay now

11. Once payment is processed you will be directed to a confirmation page listing the invoice number(s) associated with your application submission. Select CE Provider Home to return to the CE Provider page to view your application status or select My Organization Transactions to print a copy of the paid invoice(s).
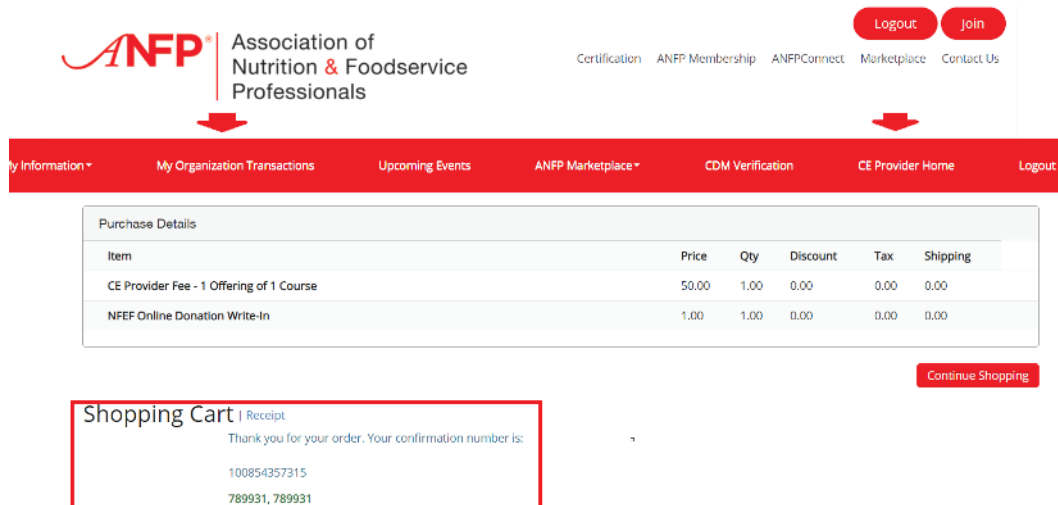
12. On the CE Provider Home page, you will see that your application is now listed in "Programs Pending Approval." You can select the details button to view the details of your application. If any changes should be required, you will need to contact priorapprovals@CBDMonline.org.
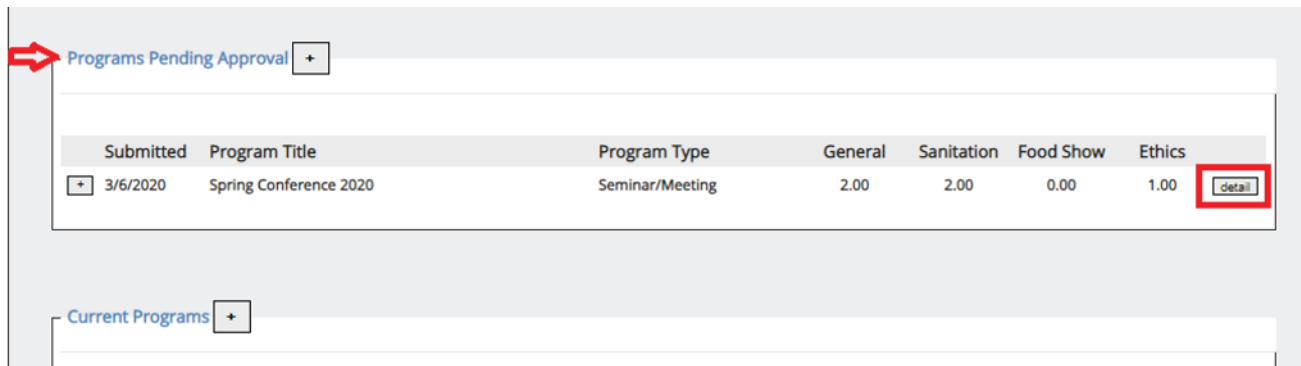
13. Per the CBDM Prior Handbook, please allow 4-6 weeks for approval. You will receive an e-mail notifying you that your application has been approved. This will include the program name, number of CE approved, approval number, and a link to the CBDM Prior Approval Logo to be used on the Certificate of Completion and any advertising.

14. After approval in the CE Provider Portal, your program will be listed in Current Programs alphabetically with the CBDM approval number.
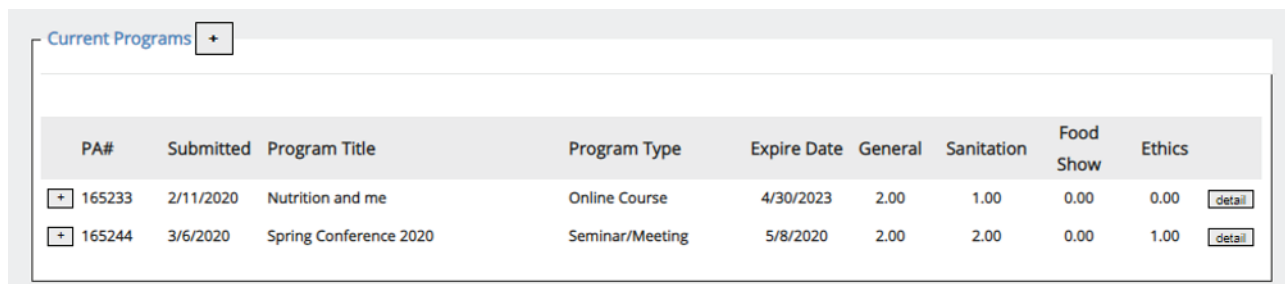
PROGRAM TYPES &
REQUIRED DOCUMENTATION

One-Time Programs
Seminar/Meeting, Live Webinar, Food Show, Field Trip/Tour

A One-Time program is a program such as a live meeting or live webinar that is offered on specific dates. It can have multiple dates and locations throughout the year as long as the speaker(s) and program content remain the same. A One-Time program is offered for $50 for the initial approval, and $50 for each additional offering.

- To add an additional offering when submitting the application, select the "+" sign in the upper right on the dates table. Up to 5 additional dates/locations can be entered. You will need to contact priorapprovals@CBDMonline.org to add more than 5 additional dates/locations.

The max start date is your provider's membership expire date - 12/31/20.

Start Date	End Date	City	State	Reg Name	Reg Email	Reg Phone	Reg Website	Sponsor	+
06/01/2020	06/01/2020	St. Louis	MO ▾	Jenny Rios	JRios@ANFPonline.org	8003231908	www.ANFPonline.org	ANFP	x
			-- ▾						x

- To add an additional offering to an already approved program, locate the program in the CE Provider Portal and select "detail." This will open the application and allow you to add an additional date/location. The date added must be prior to any previous offering dates listed. If the new offering date falls after those listed, contact priorapprovals@CBDMonline.org to add this offering. Once the new offering is added, you will be directed to the online payment system.

			Updates and Kitchen Waste							
+	165096	1/20/2020	Menu Trends 2020	IntraCompany Seminar	4/29/2020	1.00	0.00	0.00	0.00	detail
-	165095	1/20/2020	Millennials as Consumers and How they Like to Buy	IntraCompany Seminar	4/29/2020	1.00	0.00	0.00	0.00	detail

Start Date	End Date	Location	Sponsor	Amount
4/29/2020	4/29/2020	Providence, RI	Gordon Food Service	Member
4/22/2020	4/22/2020	Atlanta, GA	Gordon Food Service	Member
3/25/2020	3/25/2020	Pittsburgh, PA	Gordon Food Service	Member
3/18/2020	3/18/2020	Novi, MI	Gordon Food Service	Member
2/26/2020	2/26/2020	Rosemont, IL	Gordon Food Service	Member

+	165097	1/20/2020	Millennials as Employees and How they Like to be Led	IntraCompany Seminar	4/29/2020	1.00	0.00	0.00	0.00	detail

	251741-Obj-47	renew objectives document.
agenda document:	251741-Agenda-48	renew agenda document:
eval document:	251741-Eval-46	renew eval document:
certificate document:	251741-Cert-46	renew certificate document:
expiraton date:	4/29/2020	

To add an additional date, select Add Additional Offering

Add Additional Offering

The max start date is your provider's membership expire date - 12/31/20.

Start Date	End Date	City	State	Reg Name	Reg Email	Reg Phone

Ongoing Programs

Archived Webinar, Online/Video Course, In-Service, Ongoing Seminar/Meeting/Books

A single, ongoing program, can be viewed anytime and offered year-round. The Ongoing programs fee is $200.

- For providers without Unlimited status offering ongoing programs, approval begins the date of issuance, expiring one year from that date. The provider will be sent an e-mail notifying them of the program's upcoming expiration with direction on how to renew the program for an additional year.

- For Unlimited CE Providers offering ongoing programs, approval begins the date of issuance, expiring 12/31 of the third year. These programs remain active as long as the Unlimited CE Provider annual fee is paid. These providers then have the option to renew these programs for additional 3 years.

- **Program Type Book:** Approval begins the date of issuance, expiring 5 years from the copyright date. The copyright date must be added to the application. Book CE is not renewable.

Intracompany Seminar/Meeting & Intracompany Ongoing – These program types should be selected for those CE Providers who do not want individuals outside of their organization to have access to the education. This program type is not advertised to ANFP members on Find CE.

In general, this is the documentation required for all program types:

- Speaker(s) biography, CV, or resume

- Outcome oriented learning objectives – What knowledge will the attendee gain?

- Program Agenda with timeline

- Program Evaluation – This is will access the content, measure whether the learning objectives were met, and assess the instructor effectiveness.

- Certificate of Completion/Attendance

There are exceptions to the above listed required documentation depending on the program type selected.

Documentation required specific to the program type:

- Webinars/Archived Webinars – instead of a Program Agenda with timeline provide a description of webinar and/or webinar slides.

- Food/Trade Show – instead of speaker bios, submit a vendor list. Instead of a timeline agenda, submit a flyer.

- Field Trip/Tour – instead of a timeline agenda, submit a description of the tour.

- Online/Video Course – instead of a timeline agenda, submit a course outline.

- Book – instead of a timeline agenda, submit outline of the book to include the Table of Contents.

CONTINUING COMPETENCE LEVELS

CBDM
continuing competence
where education advances performance

Competence levels provide an understanding of the educational level of each program.

I

Assumes that the participant has entry-level knowledge of the topic. The desired outcome is to ensure a foundation of basic concepts of the subject matter.

II

Assumes that the participant has a foundation of basic concepts of the topic. The desired outcome is to enhance knowledge and facilitate application of knowledge to practice.

III

Assumes that the participant has thorough knowledge of the topic. The desired outcome is to integrate analysis and application of knowledge, incorporating continuous quality improvement into best practice.

CONTINUING COMPETENCE TOPICS

Below are the 36 topic areas outline in the CBDM exam content outline. These topic areas are being used to determine how the program meets CDM, CFPP competencies. When completing an application for prior approval select up to four topics. These topic areas are also used as search fields in Find CE.

NUTRITION
Gather Data - Document nutrition information in the medical records
Gather Data - Interview for nutrition related information
Gather Data - Obtain routine nutrition screening data
Gather Data - Identify nutrition problems and client rights
Apply Data - Modify diet plans
Apply Data - Implement physician's dietary orders
Apply Data - Apply standard nutrition care
Apply Data - Review effectiveness of nutrition care
Apply Data - Manage special nourishments and supplemental feedings
Provide Education – Assist clients with food selection
Provide Education - Use nutrition education materials
Provide Education - Adapt teaching to client's educational needs: evaluate client readiness and ability to learn

FOODSERVICE
Manage standardized recipes
Specify standards and procedures for preparing food
Supervise the production and distribution of food
Monitor meal service
Implement Continuous Quality Improvement Procedures for Foodservice Department
Modify standard menus

PERSONNEL AND COMMUNICATION
Define personnel needs and job functions Interview, select, and orient employees
Provide ongoing education
Develop and maintain employee time schedules and assignments
Manage goals and priorities for department Manage department personnel Manage professional communications
Implement changes in foodservice department

SANITATION AND SAFETY
Manage personnel to ensure compliance with safety and sanitation regulations
Manage purchasing, receiving, storage, and distribution of food and supplies following established sanitation and quality standard
Protect Food in all phases of preparation using HACCP Guidelines
Manage physical facilities to ensure compliance with safety and sanitation guidelines

BUSINESS OPERATIONS
Manage a budget
Prepare specifications for capital purchases
Plan and budget for improvements in the department design and layout
Assist in the purchasing process
Manage revenue generating services Implement cost effective procedures

Renewal Process for Unlimited CE Providers

For Unlimited CE Providers the renewal process begins in October when the annual invoices for the next calendar year are available to paid. Annual invoices can be accessed in the CE Provider Portal and payment made by credit card.

- Once the annual fee is paid, expiring programs can be renewed and new applications for the new calendar year submitted.

- Both renewal and new applications will automatically be approved and subject to the quarterly audit.

- Paid Annual invoices can be located in My Organization Transactions.

To renew an Unlimited CE Provider Ongoing program, locate the program in the CE Provider Portal. All programs available to be renewed will have a "renew" button next to it. Click the renew button and complete the application. If there are no changes to the program, check the "no changes" buttons next to the required documentation, add the start date and complete the registration information.

Renewal Process for CE Providers without Unlimited Status

Ongoing programs for CE Providers without Unlimited status expire 1 year from the date of approval. This means they can expire at any time throughout the year.

- CE Providers are notified of the expiring program via e-mail 60 days prior to the program expiration date.

- CE Providers without Unlimited status can also renew their programs for up to 6 years, however the process is different.

- In the 2nd and 3rd year of renewal, adding an additional offering will extend the program for another year's approval.

- In year 4, the program will need to be renewed by verifying all documentation is still accurate, uploading new documentation or checking the no changes buttons and completing of offering dates and registration fields.

- Then again in year's 5 and 6, an additional offering can be added.

- Paid invoices can be located in My Organization Transactions

1. To renew an expiring ongoing program, locate the program in the CE Provider Portal and select the "detail" button next to the expiring program.

2. Then select "Add Additional Offering."

3. This will direct you to the course offering and registration information page. Enter all required fields and Save. You will be directed to the online payment system where the $200 fee can be paid by credit card.

Course Offering Info

start date:
4/1/2020
Required

end date:
3/31/2021
Required

city: ongoing

sponsor:
sponsor
Required

Registration Contact Info

name:
reg contact name
Required

phone:
reg contact phone
Required

email:
reg contact email
Required

url:
reg contact url
Required

Save Cancel

CE PROVIDER
PROGRAM FEES

Program Type	Non-Profit Fee	For-Profit Fee
Unlimited Program/Renewal Program (annually)	$350	$700
Ongoing Program (per program)	$100	$200
One-Time Program	$50	$50

Late Fees	
Submissions received less than 30 days in advance	$50
Submissions received less than 15 days in advance	$75

FIND CE /
CE PROVIDER SEARCH

All Prior Approved programs are available on the ANFP website's Find CE page. Individuals can search by CE type, competence level or topic, location, provider name, and more. Providers can boost the visibility of their CE program(s) with a featured listing. All featured programs that meet search criteria will be listed first and will be highlighted with a featured CE logo.

- 1 - 5 months per program: $50/month

- 6 - 12 months per program: $25/month

- Feature 6 or more programs per month: $25 per program

If you are interested in featuring one or more of your programs, please complete the application.

CE PROVIDER
FREQUENTLY ASKED QUESTIONS

I have never submitted an application for prior approval. Where do I start?

To apply for Prior Approval, applicants must:

- Read the entire Prior Approval Handbook.

- First time users of the CE Provider Portal must submit an account set up application to priorapprovals@ CBDMonline.org. There will be an option on this application to apply for the Unlimited CE Provider program. Submit the account setup application with appropriate payment to priorapprovals@CBDMonline.org.

  - An IRS determination letter is required with initial non-profit applications.

- All applications are submitted through the CE Provider Portal which can be accessed here.

How does the prior approval process work?

- All applications are submitted online. The individual submitting the application should be logged into their personal record with ANFP. If you have problems logging in, please e-mail priorapprovals@CBDMonline.org.

- If your organization has not submitted an CE Provider Account Set-Up application, please click here.

- Once you have logged in, select CE Provider Home and then Add Program to begin the application process. The application must be completed in one sitting.

- Unless an Unlimited CE Provider, once the application is submitted, you will be directed to the online payment system.

- You will receive an e-mail confirmation that your application has been submitted. Once approved you will receive another e-mail notification.

How do I set up an account?

All applications must be submitted through the online CE Provider Portal. Only one person from an organization is allowed access to the CE Provider account through their own personal account with ANFP.

How & Where do I login?

- Visit www.ANFPonline.org

- Select **Login** on the top right of the page

- Enter your login and password

- Select Login

- To view your personal record page, at the top of the screen, next to your name select, **View Profile**

- To access the CE Provider Portal, select **CE Provider Home**

How do I become an Unlimited CE Provider?

Providers may become Unlimited CE Providers by completing the payment information on the CE Provider Account Set-Up application. As an Unlimited Provider, an unlimited number of applications can be submitted for the year. All applications are automatically approved and will be included in a quarterly audit. Details on becoming an Unlimited Provider and the audit process can be found in the CBDM Prior Approval Handbook. If you have not submitted the Setup Application for CE Provider access, please access it here.

What are the benefits of becoming an Unlimited CE Provider?

The Unlimited CE Provider/Renewal Program is an all-inclusive package providing organizations the ability and flexibility to request an unlimited number of CE programs to be prior approved on demand for a period of one year. Each program must be submitted through the CE Provider Portal and will be automatically approved with required supporting documentation.

All unlimited providers will be subject to an audit process. See Appendix G for details. All Prior Approved programs are assigned a unique Prior Approval number that is valid from the date of issuance, expiring 12/31 of the third year and remains active as long as the Unlimited CE Provider annual fee is paid. Annual invoices are created in October and are due by 12/31 of the current year.

After the third year of approval, programs become renewable for an additional three years, allowing the sponsoring organization to renew the education by re-applying for approval through the CE Provider Portal and providing required documentation for the program. The Unlimited CE Provider/Renewal Program includes new upcoming programs and covers previously approved programs up to a maximum of six years.

To become an Unlimited CE provider, complete the Account Set-Up Application and provide payment information.

What are Competence Topics?

The Exam Content Outline has 36 topic areas. These topic areas are used to determine how the program meets CDM, CFPP competencies.

What are Competence Levels?

Competence levels provide an understanding of the educational level of each program.

How do I submit a one-time event? (Live Webinar, Seminar/Meeting, Food Show, Field Trip/Tour)

A One-Time program is a program such as a live meeting or live webinar that is offered on specific dates. It can have multiple dates and locations throughout the year as long as the speaker(s) and program content remain the same. A One-Time program is offered for $50 for the initial approval, and $50 for each additional offering.

- Once logged into the CE Provider Portal Home page, select Add Program

- Add the program name, the one-time program type, number of CE and the speaker/author

- Upload the required documentation for the program type selected

- Select Competence level and topics

- Add Advertising to the notes field

- Enter the start/end dates along with the registration information

- Select "Add" – CE Provider's without Unlimited CE provider status will be directed to the online payment system.

How do I add multiple dates/locations in the application process?

To add an additional offering when submitting the application, select the "+" sign in the upper right on the dates table. Up to 5 additional dates/locations can be entered. You will need to contact priorapprovals@CBDMonline.org to add more than 5 additional dates/locations.

The max start date is your provider's membership expire date - 12/31/20.

Start Date	End Date	City	State	Reg Name	Reg Email	Reg Phone	Reg Website	Sponsor	
06/01/2020	06/01/2020	St. Louis	MO ▾	Jenny Rios	JRios@ANFPonline.org	8003231908	www.ANFPonline.org	ANFP	x
			-- ▾						x

How do I add additional dates/locations to an already approved program?

To add an additional offering to an already approved program, locate the program in the CE Provider Portal and select "detail." This will open the application and allow you to add an additional date/location. The date added must be prior to any previous offering dates listed. If the new offering date falls after those listed, contact priorapprovals@CBDMonline.org to add this offering. Once the new offering is added, you will be directed to the online payment system.

How do I submit an ongoing program? (Archived Webinar, Online/Video Course, In-Service, Ongoing Seminar/Meeting/Books)

A single, ongoing program can be viewed anytime and offered year-round. The Ongoing programs fee is $200.

- For providers without Unlimited status offering ongoing programs, approval begins the date of issuance, expiring one year from that date. The provider will be sent an e-mail notifying them of the program's upcoming expiration with direction on how to renew the program for an additional year.

- For Unlimited CE Providers offering ongoing programs, approval begins the date of issuance, expiring 12/31 of the third year. These programs remain active as long as the Unlimited CE Provider annual fee is paid. These providers then have the option to renew these programs for additional 3 years.

- **Program Type Book:** Approval begins the date of issuance, expiring 5 years from the copyright date. The copyright date must be added to the application. Book CE is not renewable.

To add the application:

- Once logged into the CE Provider Portal Home page, select Add Program

- Add the program name, the ongoing program type, number of CE and the speaker/author

- Upload the required documentation for the program type selected

- Select Competence level and topics

- Add Advertising to the notes field

- Enter the start. The end will populate out 1 year for CE Providers without Unlimited status. For Unlimited CE Providers the end date will populate out 3 years.

- Complete the registration information

- Select "Add" – CE Provider's without Unlimited CE provider status will be directed to the online payment system.

What is program type "Intracompany Seminar/Meeting" (one-time) and "Intracompany Ongoing?"

These program types should be selected for those CE Providers who do not want individuals outside of their organization to have access to the education. This program type is not advertised to ANFP members on Find CE.

What happens after I submit an application?

Applications for non-unlimited provider programs are reviewed thoroughly before approval is awarded. Sponsoring organizations will be notified within 30 days if the application is not complete and given the opportunity to submit additional materials. All documentation and payment must be received before the presentation/delivery of the CE program or processing will not continue and application will be considered inactive.

After the application is approved, the sponsoring organization will receive a confirmation e-mail containing the Prior Approval number and all other information pertinent to the approval.

How do I correct an error on an application already submitted?

Once submitted, errors in the application must be corrected by ANFP. Contact priorapprovals@CBDMonline.org.

Where can I find my paid invoice?

To locate a copy of your invoice, while logged into your ANFP personal record, select My Organization Transactions. All invoices associated with your organization will be listed with a link to print the invoice.

What are the fees for CE Providers?

Program Type	Non-Profit Fee	For-Profit Fee
Unlimited Program/Renewal Program (annually)	$350	$700
Ongoing Program (per program)	$100	$200
One-Time Program	$50	$50

Late Fees	
Submissions received less than 30 days in advance	$50
Submissions received less than 15 days in advance	$75

When are late fees applied?

Beginning June 1, 2020, ANFP will begin charging expedite fees for all applications submitted with less than 30 days to process.

- If less than 30 days, $50 will be added to the invoice.

- If less than 15 days, $75 will be added to the invoice.

I submitted an application but did not pay. What happens now?

If payment is not processed, you will be contacted by ANFP to make payment within 7 business days. To make payment login to the CE Provider Portal, locate the application under Programs Pending Payment and click the "pay now" button next to the application. Applications will not be reviewed without payment and will be discarded after 7 business days.