

How to Upload Documentation into Your Record for Continuing Education Activities

1. To begin the process, log into your member account on the ANFP website.
2. After you log in, look to the right of the screen in the box labeled **MY ACCOUNT LINKS**.
3. Click on **MY CERTIFICATION**.
4. Once your record opens, you will see a box with the **CE SUMMARY FOR CURRENT CERTIFICATION CYCLE**. This shows you a breakdown of required, reported, and remaining CE hours.

Directly below the summary box, you will see **CE ACTIVITY FOR THIS CE PERIOD**. Under each activity that you reported, you will see three areas:

- **DATE:** this is the date of the program you reported.
- **PROGRAM TYPE:** It will say **APPROVED** if it is an ANFP education program or a Prior Approved program.
- **STATUS**

Individuals in audit who have not yet uploaded the required documentation will see **AUDIT-PENDING DOCUMENTATION**.

If you have already submitted the documents for this activity, you will see **Edit**.

5. The last item is a link titled **ADD DOCUMENT**. Click on **ADD DOCUMENT**.

You will be taken to a screen with information about the program that you entered when you submitted the CE.

Near the bottom of this screen, you will see a list with the type of documents you need to upload. You will see one or more of the following and a box next to it.

- **PROOF OF ATTENDANCE**
- **PROGRAM AGENDA**
- **SUMMARY OF PURPOSE AND EVALUATION**

6. Select **CHOOSE FILE** to locate the document that you want to upload.
7. Once you select the document file, double click on it to upload it
8. After you have uploaded the documents, be sure to click **SAVE**. The documents will not be posted to your CE record until you hit **SAVE**.

9. Continue this process for each required document. Notice that the **ADD DOCUMENT** link changed to **EDIT** once the document was uploaded.

If by chance you accidentally uploaded the wrong document, you can replace that document by simply selecting a different file and hitting **Save**. This will replace the document you previously uploaded.

10. Continue this process until you have uploaded all of the required documents for each of the CE activities that you reported.

11. Once all documents are uploaded, click on the green button that says **SUBMIT CE FOR REVIEW**.

Once you click on the **SUBMIT** button, CBDM will be notified that you have submitted the documentation required as part of the audit process. CBDM will review your CE record. By about September 1, CDM, CFPPs being audited will be notified by CBDM via e-mail of their CE audit status.

Please note, it is extremely crucial to select the SUBMIT after all documents are uploaded.

If you don't hit **SUBMIT**, CBDM will not receive notification that you submitted your documentation, therefore, you may be at risk of failing the audit and losing your certification.

Please keep in mind that CDM, CFPPs who are being audited must upload all documentation by June 30.

Failure to do so will result in failing the audit and certification being terminated.

If you have any additional questions, please do not hesitate to contact ANFP Professional Development Services at 800-323-1908 Monday through Friday 8:00 a.m. through 5:00 p.m. Central Standard Time. You may also e-mail info@CBDMonline.org.