



**The Georgia Society
of CPAs**

ON-SITE ADMINISTRATOR PROCEDURES

Thank you for volunteering to be an On-Site Administrator, we appreciate your help!

The following items are included in this package:

- Two participant lists - one for your use at registration and one for instructor
- On-site registration forms
- Registration table signage
- Pre-addressed UPS return label
- Facility confirmation sheet
- Promotional material
- Instructor expense form
- Online evaluation and credit certificate statement for instructor
- CFP Board credit sign-in sheet, if applicable, for instructor

Set-Up Registration Table

Place the registration table signage and promotional materials (catalogs, brochures) on the table. Make sure the correct number of books were shipped.

eMaterials

Participants have the option of downloading their materials electronically. Participants who choose eMaterials will be highlighted in yellow on the participant list. They do not receive a manual. If there are manuals left after registration for any walk-ins, and someone who chose eMaterials requests one, it is fine to give them one as long as everybody else has received their manual.

When the instructor arrives, give him/her a copy of the Participant List that you printed along with the following items from the OSA Packet: Expense Form, Online Evaluation Statement, CPE Verification of Attendance Forms and the CFP Board Credit Sign-In Sheet (if applicable).

Check the Meeting Room

Confirm that the room is set-up correctly and all A/V requests have been fulfilled per the Facility Confirmation sheet. If something is missing, please inform the facility contact right away. You may also want to take a moment to familiarize yourself with the location of the nearest restroom as this tends to be a common question.

Confirm Food Service

Confirm serving time and numbers for breaks and lunch with the facility staff, this information is also on the Facility Confirmation. Some facilities utilize off-site catering, and this contact information can also be found on the Facility Confirmation. If several people register on-site, please inform the catering contact person and update them on the new totals as soon as possible.



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Check-In Participants

Registration begins at 7:30 a.m. Check off each person's name on the master registration list and give each participant one set of course materials. If a person's name does not appear on the registration list, it's possible that their registration was not received by the CPE Department before the final copy was sent out. Some may wish to register/pay on-site. In either case, please have them fill out an On-Site Registration Form. Please collect money or credit card information from those who are registering on-site. (The fee for the class appears on the top of the Participant List.) If the person states that payment was mailed beforehand, we will confirm payment at a later date. If the person is attending in someone else's place (substituting), please note that on the Participant List. **Please be sure that each participant's name is listed on the master Participant List and each person receives the course materials.**

We always ship extra books to the facility to cover on-site registrants or replace damaged or misprinted materials. If you have given out all of the course materials and someone wants to register on-site, please let them know that they can register for the class and the materials will be mailed to them as soon as possible.

Course Begins

The seminar begins at 8 a.m.; there may still be some participants that have not arrived yet. You may leave the books on the registration table, or take them into the seminar; whichever you prefer. Just make sure, at some point during the day, to get the person's name and notate on the participant list what time they arrived.

It is important to note when people come in because if a person arrives after 9:30 a.m., they cannot claim the full 8 hours of credit. Mark on the master registration list "arrived at 10 a.m." (for example), for anyone who arrives after 9:30 a.m. Please also make a note next to the name of anyone that leaves early (i.e. "left at 3:30 p.m.").

****Some classes will qualify for Certified Financial Planner (CFP) credits in addition to the CPE Credit. If a course qualifies for the additional CFP credit, there will be a separate credit form included for those who want to claim the credit. If this is the case, please ask the instructor to announce to the participants that the seminar qualifies for CFP credit. Those interested in claiming CFP credit **must** sign the Certified Financial Planner (CFP) Board Credit Sign-In Sheet. Return this document along with the participant list.**

After the Seminar

- Please use the enclosed pre-addressed UPS label to return the following items within two weeks:
- The master participant list – this is how credit will be issued to participants
- CFP Credit Sign-In Sheet (if applicable)
- Any On-Site Registration Forms (including payment)
- Any extra course manuals or forms/documents. All course materials are copyrighted by the vendor and any extras must be returned.

If you have any questions, please contact the GSCPA CPE Department at cpe@gscpa.org or 800-330-8889 Opt. 3.