CHAPTER EVENT CHECKLIST

Please use the following as a guide to set up your chapter event with National. Recommended dates for submitting and any required blackout dates are included below. Submit event forms to Gina Jolly (gjolly@iasa.org) or Tricia Stillman(tstillman@iasa.org):

Carolina: Tricia	Central Illinois: Gina	Chicagoland: Tricia	Georgia: Tricia	Indiana: Tricia
Land-O-Lakes: Gina	Metro NY/NJ: Tricia	Michigan: Gina	Mid-Atlantic: Gina	Mid-South: Gina
Midwest: Tricia	Northeastern: Gina	Ohio: Tricia	Pacific NW: Gina	ShowMe: Gina
SW Ohio: Tricia	Sunshine: Gina	Texas: Tricia	Utah: Gina	Wisconsin: Tricia

Notify National of any chapter event dates as soon as possible so we can approve the dates and include them in all marketing materials as able, **but no less than 60** days ahead of event date. Please reference **blackout dates** for 2024: **May 1st through June 21st**.

Please allow flexibility for (post June) event set ups during this time. Post Xchange IASA staff are verifying CPE for Xchange attendees and preparing on-demand content for the eLearning Center.

1.   Complete **Chapter Event Request Form** with as much detail as possible. Form should be submitted **no less than 60 days** prior to event date to ensure marketing of event. This form will provide all details needed to open registration, set up marketing, sponsorship, and exhibitor tickets. Please be sure to include with submission all venue details such as venue photo, address, venue description and verification of venue approval to use photo.

   a. Exhibitors will register on-line just as attendees once package is set up in the registration system. All exhibitor benefits will be fulfilled by the chapter and Exhibitors should work directly with the chapter not National.
   b. Sponsors will register by simply sending an email to the designated staff person handling your chapter event, as noted above, to process payment and logo placement. Once registration is complete sponsors will work directly with the chapter for all benefits received.

2.   Review all NASBA requirements based on type of event to ensure you provide all required items no later than 2 weeks prior to event date. **NASBA Group Live, NASBA Group Internet Based**

3.   Send all speakers the "Speaker Agreement Form" link below to complete **no less than 30** days prior to event. This link will allow them to provide their **headshot, Bio, Learning Objectives and Session descriptions** (**needed to qualify the session for CPE credit in marketing**) on one form. The form will come directly to National, and we will copy the chapter when received. This form also serves as an agreement to speak at the chapter event. This form is now required for all speakers. https://www.emailmeform.com/builder/form/48ZDalKa32aCV0Bx **If all items are not provided for the session in time for a final marketing prior to the event the session will not be eligible for CPE**. The chapter is required to review items sent to ensure accuracy for CPE.

4.   Send all speakers the "**Reviewer Form**" link below to have the presentation reviewed by a qualified individual not involved in the development of the presentation. This must be completed within two weeks of the event and before the presentation is submitted. https://www.emailmeform.com/builder/form/iuX4AvOaT0

5.   Provide a complete **Agenda no less than 3 weeks prior** to event date to include final session title, speaker name, session dates and times, any prerequisites. **This is required to offer CPE and all sessions with full details CPE must be included in a final marketing to be captured for NASBA should IASA be audited.**

6.   Complete the **CPE Submission Request no less than 3 weeks prior** to the event date. You must provide all prerequisites for any CPE's that are Intermediate or Advanced level. No prerequisites are required for Basic level. If a field of study is not provided it will automatically defer to an accounting credit. Please remember that CPE credits must round down to .0 or .5. IASA is standardizing credits across all offerings per NASBA.

7.   Send all speaker presentations and handouts to the staff person designated for your event above **no less than 1 week prior** to the event. Only final versions should be sent for loading to the website and **must be received before the event day. Multiple versions will not be loaded**. All handouts should be sent in PDF format ready for upload.

8.   Event registration lists will be sent to chapter weekly once registration is open. A final registration list and any other necessary documents will be provided 48 hours prior to the event. **Reports more than once a week will not be provided unless required for a final hotel or meal count.**

9.   24 hours prior to any in-person event an email will be sent to all attendees by National to provide them with the link to complete a CPE Verification Form for the sessions attended. All attendees who need CPE will be required to complete the form within one week of the event and have signed into the sessions to be eligible for CPE. The form will auto-submit to National. **ALL CPE requirements must be completed within one week following the event to process those qualifying for CPE credit. (The Verification link for CPE will be deactivated one week after the event, and evaluations must be completed within one week following the event, according to stated deadlines.) If support is not requested to collect CPE certificates within 30 days following the event date, CPE will be forfeited. Chapter officers should convey requirements to attendees at the event.** One off processing of CPE for those not meeting specified timelines is labor and time intensive for IASA staff for current and past events.

10.   Chapters are required to send all necessary documents to the staff person designated for your event following the event for CPE's to be processed in a timely manner.

   a. Virtual events require all zoom reports (attendance and polling) for each session to be sent to the staff person designated for your event within 48 hours after event. Chapters must manage their own virtual event platform logistics (Zoom Webinars). IASA will manage registrations and event site.
   b. In-person events require **all sign in sheets to be scanned (legible) and emailed to the staff person designated for your event within 48 hours following event.** The CPE Verification Form is required to be completed by attendees and submitted **within one week** (see above #9).
   c. If National provides chapter banking and invoices or expenses need to be paid those should be submitted to the staff person designated for your event within one week after the event for us to process the closing documents.

11.   Events financials will be finalized and sent to National Accounting the month following the event for processing. National will strive to close the accounting and provide payment within 90 days of the following event. If the chapter owes monies to National payment should be submitted within 30 days of receipt of final accounting of event.