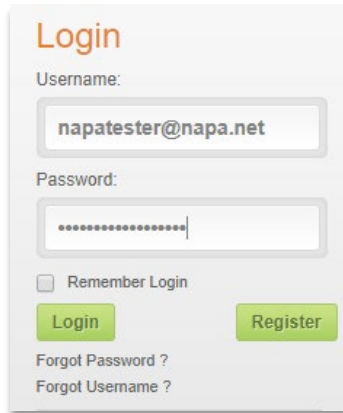


CE Summary and Self-Reporting Job Aid

Below are instructions for using the new CE Summary and self-reporting tool:
Watch our easy step-by-step video [here](#).

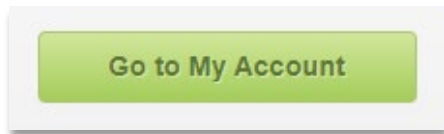
1. Click “**Login**” or “**My Account**” from the top menu of napa-net.org, or click here: <https://asppa.personifycloud.com/PersonifyEbusiness/Home>
2. Enter your username and password to gain access to your My Account page. Use the **Forgot Username?** Or **Forgot Password?** links to find your username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



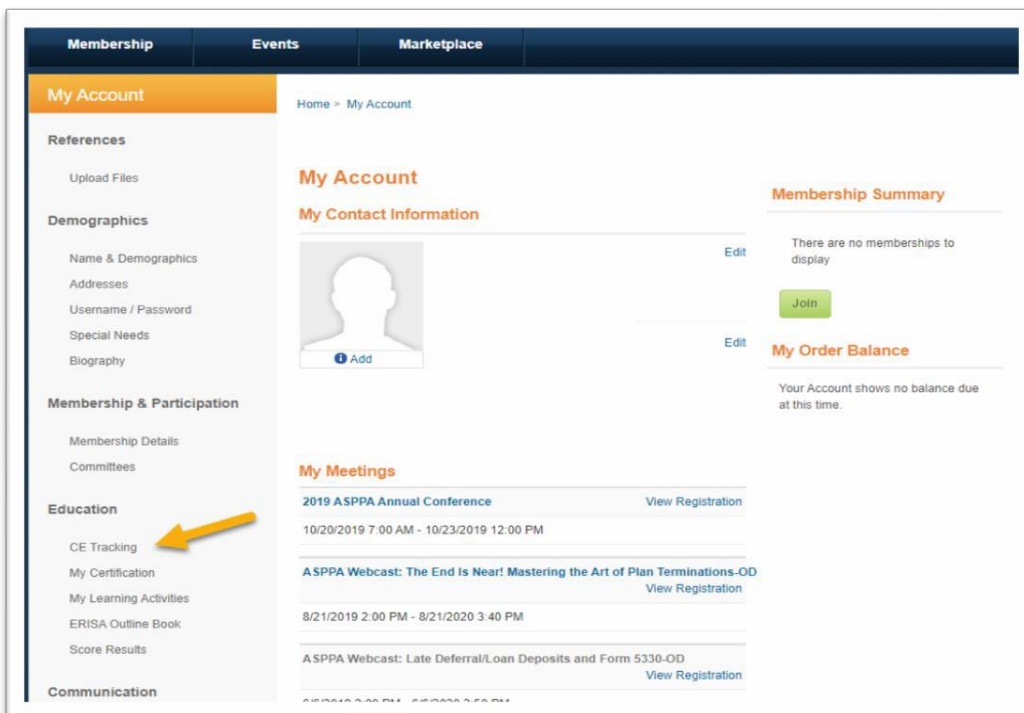
The screenshot shows a login form with the following elements:

- Login** (orange heading)
- Username:
- Password:
- Remember Login
-
- [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 "Education" menu item is highlighted, and a yellow arrow points to the "CE Tracking" link. The main content area displays "My Account" information, including contact information, membership summary, and order balance.

Membership **Events** **Marketplace**

My Account Home > My Account

References

- Upload Files

Demographics

- Name & Demographics
- Addresses
- Username / Password
- Special Needs
- Biography

Membership & Participation

- Membership Details
- Committees

Education

- CE Tracking** (highlighted with a yellow arrow)
- My Certification
- My Learning Activities
- ERISA Outline Book
- Score Results

Communication

My Account

My Contact Information Edit

Membership Summary

There are no memberships to display

My Order Balance Edit

Your Account shows no balance due at this time.

My Meetings

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

- Click the **“CE Tracking”** link under the **“Education”** heading or click here: <http://asppa.personifycloud.com/PersonifyEbusiness/My-Account/New-CE-Summary>
- 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
NAPA Continuing Education	0	5	12/31/2019
NAPA Ethics	0	1	12/31/2019
NAPA Relevant Topics	0	4	12/31/2019

- 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.

- Click **“Add”** to add a self-reported program.

- Fill in all fields and choose a CE type – **Professional, Ethics, or Relevant Topics**

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
NAPA Continuing Education	1	4	12/31/2019
NAPA Ethics	0	1	12/31/2019
NAPA Relevant Topics	0	4	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:

To review the NAPA CE policy guidelines, click the **“NAPA CE Policy”** link on the left side bar.

Reminder you can watch our easy step-by-step [video here](#).

Need additional support or have questions? Call 703 516 9300 or email CustomerCare@napanet.org!