

CFP Board's Online Education Verification System – Tip Sheet

CFP Board-Registered Programs are required to submit eligibility lists of students who have completed their program.

Individuals identified by a CFP Board Registered Program as the Program Director and/or Primary Contact may now submit eligibility lists through CFP Board's online Education Verification System, which provides a convenient way for you to submit these lists and assist your program's graduates in taking the next steps toward CFP® certification.

Please use the information below to format your eligibility lists before uploading to the Education Verification System.

Formatting Your Eligibility Lists

- Lists must contain exactly **eight** columns that contain the information outlined below.
- Lists must include a header row containing **the exact column titles listed below**.
- Lists must be saved as **.CSV files** prior to upload.

FirstName	LastName	StudentID	CFPBoardID	Last4SSN	StartDate	CompletionDate	EmailAddress
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FirstName - Required

The student's first name submitted must match the name on the individual's CFP Board account. If the student has not yet created an account with CFP Board or registered for the CFP® Certification Examination, a notification will be sent to student at the email address included on your eligibility list.

LastName - Required

The student's last name submitted must match the last name on the individual's CFP Board account.

StudentID - Optional

The student's ID number that is associated with your school.

CFP BoardID - Optional

If the student has already created a CFP Board account or registered for the CFP® Certification Examination, please include his or her CFP Board ID number.

Last4SSN - Optional

Enter only the last four digits of the student's Social Security number. This information will be used solely for the purpose of matching your submission with the student's account.

StartDate - Required

The date the student began the first course in the Registered Program. This information will be used to determine the curricular requirements of the student. Enter this date in mm/dd/yyyy format.

CompletionDate - Required

The completion date is the date the student completed all required courses in the Registered Program. Enter this date in mm/dd/yyyy format.

EmailAddress- Required

The student's email must be accurate, as the eligibility list upload process sends an automatic email notifying the student of your submission. Please advise your students that the automatically-generated emails may be sent to spam folders.

Random Audits of Eligibility Lists

CFP Board will randomly audit uploaded eligibility lists to ensure the accuracy of the student records. If one of your program's lists is audited, you will need to supply documentation of the student's completion of the required courses. CFP Board will contact the Program Director and/or Primary Contact of Registered Programs whose eligibility lists have been randomly selected for audit.