CFP BOARD

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

FAQ- Using the Registered Programs Portal

How do I access the portal?

Portal access is granted to individuals assigned to the following contact roles: Chief Academic Office, Program Director, Primary Contact, and Secondary Contact. Registration and a valid login with the CFP Board site are required.

Schools applying for a new registered program will work with CFP Board staff to receive portal access. Please contact Registered Programs@CFPBoard.org for assistance.

Contacts at schools with active programs will have access to the portal through their CFP Board account. Login to www.cfp.net and click **Registered Programs Account**. Please contact RegisteredPrograms@CFPBoard.org for assistance with portal access or to update program contacts.

When can I start reporting?

Reporting will be available based on your cohort assignment:
May cohort: January 1-March 1
September cohort: May 1- July 1
January cohort: September 1-November 1

What information is collected during reporting?

The following information is collected through the initial application and renewal reporting:

- Program contact information
- Program format details
- Self-Evaluation
- Course details
- Faculty details
  - Highest degree earned
  - Degree discipline
- Principal Knowledge Topics
  - Programs will indicate which course(s) cover each of the 72 Principal Knowledge Topics
- Registration Agreement
  - Terms and Conditions of Registration for CFP Board Registered Programs digitally signed by program director
- Fees
  - Initial program review fee *or* Renewal Review fee
  - Annual program fee
- Program Director CV
- Course syllabi
- For Renewal Only:
  - Total Program Enrollment
  - Mid-point Enrollment
  - Enrollment by Gender
  - Enrollment by Race/Ethnicity
  - Certification Completion Initiative (CCI) Targets

The following information is updated through annual reporting:

- Program contact information
- Program Director CV
- Total Program Enrollment
- Mid-point Enrollment

- Enrollment by Gender
- Enrollment by Race/Ethnicity
- Certification Completion Initiative (CCI) Targets
- Terms and Conditions of Registration for CFP Board Registered Programs digitally signed by program director
- Annual program fee

Which browsers support the portal system?

Chrome 55, Chrome 56 (phones)
Chrome 64
Internet Explorer 11.0
Microsoft Edge
Firefox 51
Safari 10.0

While you may be able to access the portal through other browsers, they may not allow the portal functions to work optimally, or at all.

How does CFP Board define Total Program Enrollment (TPE) and Mid-point Enrollment?

In order to maintain reporting consistency across programs, Total Program Enrollment is defined as your program's enrollment as of the last day of the prior year. For example, if you are in a renewal period in the May cohort of 2018, your TPE is your program's enrollment as of December 31, 2017. Mid-point Enrollment is defined as the total number of enrolled students who are at least half way through your program as of the last day of the prior year.

How should I report program statistics if enrollment data is not collected for my program?

For your first reporting period, an estimate of enrollment based on the above definition is permissible. For future reporting periods, please work with your Registrar's office to put an enrollment tracking system in place.

What courses should I report to CFP Board?

Only those courses that teach the Principal Knowledge Topics should be reported to CFP Board. Elective courses or ones that are required under a degree program that do not teach the Principal Knowledge Topics will not be reported.

Are CVs still required during reporting?

The program director CV will be collected at every reporting (initial, annual, renewal). Faculty CVs are no longer collected by CFP Board. The program will only report the degree information for faculty members. However, CFP Board may request a CV or additional information to verify faculty qualifications.

How do I pay?

Payment of the annual fee and application/renewal review fees can be paid by credit card through the portal. Payment is due at the time of submission.

If you are paying by check, an invoice is available through the portal. The check must be sent to CFP Board and processed to your account in order to submit the completed online reporting. If your Accounts Payable requires a turn-around time of several weeks to have a check sent by mail, you should retrieve the invoice once it is available to start that process. You may enter and save reporting information so that it can be submitted once the payment has been applied.

Why am I unable to sign the Terms & Conditions?

The Terms & Conditions is digitally signed by the Program Director or Chief Academic Officer. Only one signature is required. If you are not assigned to either of these contact roles, you cannot complete this section of reporting.

To sign the T&C, you must scroll through the entire text box. The attestation will not become functional without this step. If you have scrolled through the T&C and still cannot sign, please try another browser. A list of browser versions that support the portal is available on page 2 of this document.

Where can I find a receipt for my payment?

Once the payment has been processed, a closed invoice confirming receipt of payment will replace the open invoice in the portal. This will be accessible until the next reporting period when a new invoice is generated.

Once I have submitted initial/renewal reporting, when will I receive a decision from CFP Board?

CFP Board staff will contact the Program Director if any part of the submission is found to be out of compliance or require more information. A final decision will be reached no later than the cohort start date (January 1, May 1, September 1).

What do I have access to based on my assigned contact role*?

	Program Director	Chief Academic Officer	Primary Contact	Secondary Contact
Receive communications on CFP Board registration decisions	X	X	X	
Receive general Program Communications	X	X	X	X
Submit Batch Uploads Through Education Verification System	X	X	X	X
View CCI and Exam Data	X	X	X	X
Enter Reporting Data	X	X	X	X
Act as Signatory on Terms and Conditions	X	X		
Act as Signatory During Reporting	X			
Submit Reporting	X			

*Contact role assignments can be viewed in the portal at any time in the Current Programs table.

For assistance with any questions or concerns, please contact RegisteredPrograms@CFPBoard.org or 202-379-2224.