Self-Study Requirements: CFP Board Ethics 2018

September 5, 2017
Accepted Delivery Models

- Live presentation is defined as
  - Real-time interaction between the instructor and participants
  - In-person session
  - Web Conferencing where attendance and engagement can be measured

- Self-Study is defined as
  - E-Learning; real-time interaction with the content
  - Delivered online through a system that will meet the required functionality covered in this document
  - Recognizes a pre-determined deadline for completion (as per CE Sponsors policy)

- Delivery methods no longer accepted:
  - Previously recorded content delivery
  - Unmonitored independent study
Self-Study (Online) Course Delivery

- Required progression through course material and successful completion of activities
- Activities imbedded after each module; may include but are not limited to:
  - Pop Up Quizzes
  - Case Studies
- Access to the final assessment only after the course has been completed
- PDF of content can be made available
  - The course must still be completed online
Core & Supplemental Content

- CFP Board will provide
  - Learning Objectives
  - 100 minutes of *required* core content with script
  - Variety of exercises and case studies for sponsor to draw from
  - Assessment question bank
  - Guidelines for the course evaluation

- CE Sponsor may
  - Add supplemental ethics related content (total course time not to exceed 120 minutes)
  - Add 2-3 questions to the assessment bank to cover this content
  - Add a 3rd hour of content to satisfy requirements other than CFP Board Ethics (3rd hour can be registered separately as General CE)
Final Assessment

- Follows CFP Board CE Policy
  - 20 questions total
  - 70% passing score

- Test Bank provided by CFP Board
  - 40 questions based on learning objectives
  - 2-3 questions can be added by CE Sponsors to cover ethics related supplemental content

- Online Capabilities
  - Randomize assessment questions after each attempt
  - Display total questions correct and incorrect after each attempt
  - No display of correct response feedback without passing score
  - Limit attempts to 3; before content review is required
Course Evaluation

- **Required** for all Self-Study (Online) course completions
  - Can be an online link to a course evaluation form or
  - Questions added to the final Assessment as non-graded responses
  - Provide the CE Sponsors the ability to summarized responses in a reportable format

- Summary of responses must be provided to CFP Board when requested with a response summary for each question equal to the number of reported completions within a specified time-period
Certificates of Completion & Attendance Reporting

- Certificates of Completion will be made available to those scoring a 70% or higher on the assessment.
- Certificate of Completion must include the CFP Board Program ID.
- Attendance reporting will be completed within 14 days of course completion.
QUESTIONS: PLEASE CONTACT

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