



CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

## ATTENDANCE REPORTING TIPS

Below are a series of tips to ensure your experience in uploading attendance reports runs smoothly. In addition, step-by-step instructions can be found online under [Resources for CE Sponsors](#) along with the Attendance Reporting Excel template and a list of Frequently Asked Questions.

These tips are specific to the Excel template – following these guidelines will ensure you have a successful upload of attendance files.

1. Copying and pasting information can change the formatting of the cell!
  - Program ID must be 6 digits; cell format is 'Number'
  - Dates must be in MM/DD/YYYY format; cell format is 'Short Date' (i.e. 4/20/2017)
  - SSN must be last 4 digits only; cell format is 'Text' to accommodate any last 4 SSN that begin with a zero
  - CFP ID is **at the most** 6 digits; cell format is 'Number'
2. Inadvertent special characters, such as backslashes, exclamation points, and parentheses, will cause the system to reject the template. Ensure any are removed before you start the upload process
3. The system will only recognize the first page of the excel document.
  - Each attendance report should be its own document
4. Always double check your Program ID numbers.
  - Verify Program ID numbers by going to the Program Management section in your CE sponsor account.
6. CFP Board ID Numbers are a minimum of 4 digits and a maximum of 6 digits
  - if an individual gives you an ID number longer than 6 digits, it is not a CFP Board ID Number.
  - if you don't have the last four of the SSN, you'll need to check with the attendee for the correct CFP ID Number
7. The system requires these template fields be completed for each record:  
**100% Required Field Completion**
  - CFP Program ID
  - Date Individual Completed
  - Last Name
  - CFP ID OR Last 4 SSN (at least one of these fields must be populated)

As always, help is an email or phone call away.

Do not hesitate to email us at [CEreport@cfpboard.org](mailto:CEreport@cfpboard.org) or call 202-379-2221.