

CFP Board's Online Education Verification System – Step-By-Step

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 are required to submit eligibility lists through CFP Board's online Education Verification System, which provides a convenient way for you to upload the information and review it for accuracy before you submit these lists and assist your program's graduates in taking the next steps toward CFP® certification.

The information below is using **a mock account and fake students** that describes a step-by-step procedure of how to upload your student eligibility list. If you have any further questions, please reach out to registeredprograms@cfpboard.org.

Step-By-Step

Part 1- Uploading the List

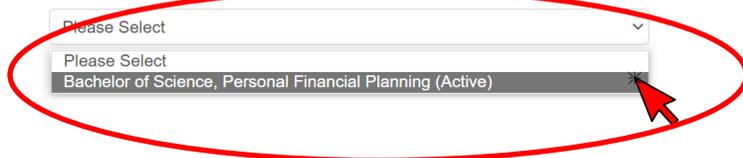
1. Select the program name from the drop-down list; you will see only the program(s) for which you listed as an authorized representative:

Upload Eligibility

Upload your eligibility file:

If you are new to the Registered Programs Portal or the reporting of student program completions, use [this link](#) for a step-by-step guide to the process.

1. Select the Program Name
2. [Download the File Upload Template](#) and enter the requested information. Instructions on completing this document are provided in our [Tips Sheet](#).
3. Click the **Browse** button to find the saved .CSV on your computer
4. Click the **Upload Eligibility** button
5. Review the batch summary and details sections. You may edit the information that displays in the details section below; however, please be aware that editing your list on this page will not affect the source file on your computer. Any edits made to your list will be lost if this page is closed without submitting. If you find significant errors on your list, we suggest that you make the required edits in the source document on your computer before completing the upload.
6. Click the "Submit Eligibility" button to enter the data in CFP Board's system. When you submit your file, an automated confirmation email will be sent to the Program Director and Program Contact of record for this CFP Board Registered Program, and automated confirmation emails will be sent to each individual listed in your file with a valid email address.



2. Click the **Browse** button to find the saved .CSV file.

Upload Eligibility

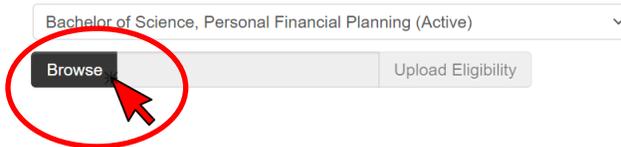
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Bachelor of Science, Personal Financial Planning (Active)

Browse Upload Eligibility



3. Click the **Upload Eligibility** button to upload your .CSV file.

Upload Eligibility

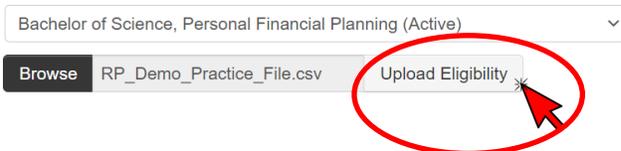
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Bachelor of Science, Personal Financial Planning (Active)

Browse RP_Demo_Practice_File.csv Upload Eligibility



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4. Once you have uploaded your .CSV file, you will see your list uploaded just as it appears in your spreadsheet.
 - a. You can also view the total amount of uploads that were valid or invalid. (See A)
 - i. *Valid = no errors*
 - ii. *Invalid = errors that need to be edited or removed.*
 - b. In this example, you see errors that need to be addressed. The ones that do not have errors are ready for submission. (See B)
 - c. If there are no errors or once you have corrected or removed all errors, you will be able to submit by clicking the **Submit Eligibility** button. (See C). *The button will be disabled until there are only valid records for submission.*
 - d. Please note: There is no way to save a batch that has errors. All errors need to be resolved to submit. If you close the browser or allow the session to time out, you will need to upload the file again.

Browse Upload Eligibility

Total: 10
Valid: 5
Invalid: 5

A

Submit Eligibility

	First Name	Last Name	Student ID	CFP Board ID	Last 4 SSN	Start Date	Completion Date	Email	Errors
Edit Delete	Hank	Pym		482777		1/1/2020	12/31/2022	zzhpym@stage.eduZZ	
Edit Delete	Janet	Van Dyne		482778			5/30/2022	zzjvandyne@stage.orgzz	StartDate required
Edit Delete	Anthony	Stark	2008			1/1/2021	12/31/2022	zzaestark@stage.eduzz	
Edit Delete	Robert	Banner			6347	6/1/2020	5/30/2022	zzrbanner@stage.eduzz	
Edit Delete		Jones				6/1/2020	5/30/2021	zzrichardmilhousejones@stage.orgzz	FirstName required
Edit Delete	Steven Grant	Rogers				1/1/2021	9/1/2021		EmailAddress required
Edit Delete	Wanda	Frank				9/1/2019	5/30/2022	zzwfrank@stage.eduzz	
Edit Delete	Jacqueline	Duquesne	287500			1/1/2020	5/30/2022	zzjduquesne@stage.orgzz	
Edit Delete	Harry	Cleese				1/1/2020		zzhcleese@test.eduzz	CompletionDate required
Edit Delete									FirstName required LastName required StartDate required CompletionDate required EmailAddress required

Submit Eligibility

C

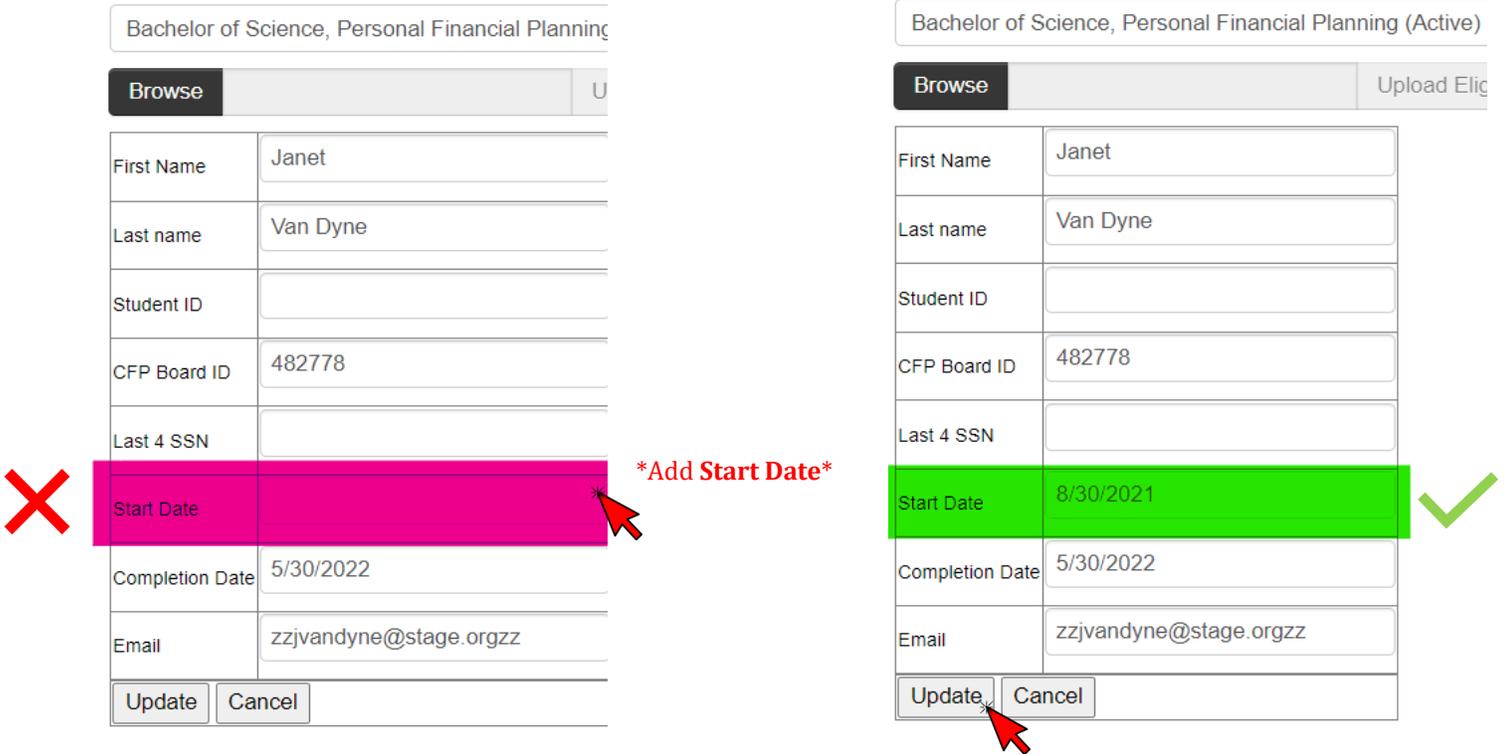
B

Part 2- Example of How to Fix an Error

5. An error you might encounter is a missing **StartDate**, which is one of the requirements to upload a student. (See A)
 - a. On the far left, you will select the **Edit** button to fix the error. (See B)



6. Once selecting the **Edit** button, you will be able to adjust the student's information:
 - a. The **Start Date** is a requirement and once you add the start date, you will click the **Update** button.



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7. Once you select the **Update** button, you will see your error has been resolved and the total number of **Valid** students increased.

Total: 10

Valid: 6

Invalid: 4

Submit Eligibility

	First Name	Last Name	Student ID	CFP Board ID	Last 4 SSN	Start Date	Completion Date	Email	Errors
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Hank	Pym		482777		1/1/2020	12/31/2022	zzhpym@stage.eduZZ	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Janet	Van Dyne		482778		8/30/2021	5/30/2022	zzjvandyne@stage.orgzz	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Anthony	Stark	2008			1/1/2021	12/31/2022	zzaestark@stage.eduZZ	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Robert	Banner			6347	6/1/2020	5/30/2022	zzrbanner@stage.eduZZ	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>		Jones				6/1/2020	5/30/2021	zzrichardmilhousejones@stage.orgzz	FirstName required
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Steven Grant	Rogers				1/1/2021	9/1/2021		EmailAddress required
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Wanda	Frank				9/1/2019	5/30/2022	zzwfrank@stage.eduZZ	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Jacqueline	Duquesne	287500			1/1/2020	5/30/2022	zzjduquesne@stage.orgzz	
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Harry	Cleese				1/1/2020		zzhcleese@test.eduZZ	CompletionDate required
<input type="button" value="Edit"/> <input type="button" value="Delete"/>									FirstName required LastName required StartDate required CompletionDate required EmailAddress required

Submit Eligibility

8. Another error you may encounter is a blank row:
- To remove it, you may delete the row entirely by selecting the **Delete** button.
 - If you need to delete a record, this is the way to do it as well.*

<input type="button" value="Edit"/> <input type="button" value="Delete"/>									FirstName required LastName required StartDate required CompletionDate required EmailAddress required
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You will **repeat steps 6 through 8** until all the errors have been resolved.

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9. A complete and successful upload will appear like this:
 - a. There are no more **red error messages**.
 - b. There are **0 invalid records**.
 - c. The **light blue submit button** has turned **dark blue**.

Total: 9
Valid: 9
Invalid: 0

Submit Eligibility

	First Name	Last Name	Student ID	CFP Board ID	Last 4 SSN	Start Date	Completion Date	Email	Errors
Edit Delete	Hank	Pym		482777		1/1/2020	12/31/2022	zzhpym@stage.eduZZ	
Edit Delete	Janet	Van Dyne		482778		8/30/2021	5/30/2022	zzjvandyne@stage.orgzz	
Edit Delete	Anthony	Stark	2008			1/1/2021	12/31/2022	zzaestark@stage.eduZZ	
Edit Delete	Robert	Banner			6347	6/1/2020	5/30/2022	zzrbanner@stage.eduZZ	
Edit Delete	Richard	Jones				6/1/2020	5/30/2021	zzrichardmilhousejones@stage.orgzz	
Edit Delete	Steven Grant	Rogers				1/1/2021	9/1/2021	zzstevengranrogers@stage.eduZZ	
Edit Delete	Wanda	Frank				9/1/2019	5/30/2022	zzwfrank@stage.eduZZ	
Edit Delete	Jacqueline	Duquesne	287500			1/1/2020	5/30/2022	zzjduquesne@stage.orgzz	
Edit Delete	Harry	Cleese				1/1/2020	12/31/2021	zzhcleese@test.eduZZ	

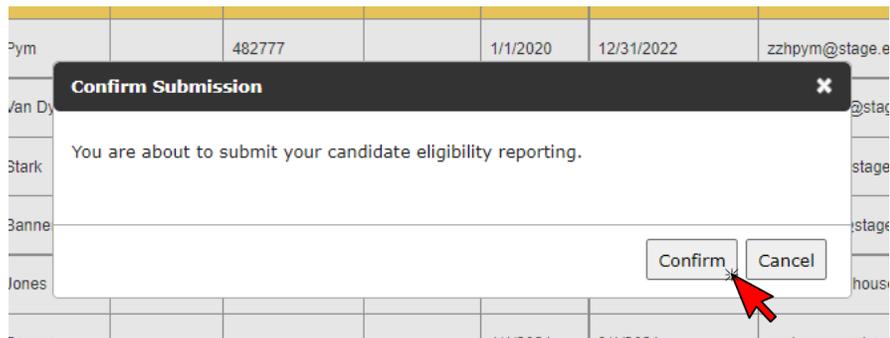
Submit Eligibility

10. Once you are ready to submit, you will click the **Submit Eligibility** button

Edit Delete	Harry	Cleese				1/1/2020	12/31/2021	zzhcleese@test.eduZZ	
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Submit Eligibility

11. You will get a "pop-up" confirmation regarding your submission.



Non-Degree Programs Payments of Per Capita Fee

1. After clicking on the **Confirm** button, non-degree programs will get this notice regarding the non-refundable Per Capita Fee.

[Submit Eligibility](#) When all errors are resolved, you may submit the batch. **The Per Capita Student Completion Reporting Fees are non-refundable.** Please be sure that your data is correct.

	First Name	Last Name	Student ID	CFP Board ID	Last 4 SSN	Start Date	Completion Date	Email	Errors
Edit Delete	Hank	Pym		482777		1/1/2020	12/31/2022	zzhpym@stage.eduZZ	
Edit Delete	Anthony	Stark	2008			1/1/2021	12/31/2022	zzaestark@stage.eduZZ	
Edit Delete	Robert	Banner			6347	6/1/2020	5/30/2022	zzrbanner@stage.eduZZ	
Edit Delete	Wanda	Frank				9/1/2019	5/30/2022	zzwfrank@stage.eduZZ	
Edit Delete	Jacqueline	Duquesne	287500			1/1/2020	5/30/2022	zzjduquesne@stage.orgZZ	

[Submit Eligibility](#) When all errors are resolved, you may submit the batch. **The Per Capita Student Completion Reporting Fees are non-refundable.** Please be sure that your data is correct.

2. After clicking on the **Submit Eligibility** button, non-degree programs will get a Confirm Submission notice.

Confirm Submission ✕

You are about to submit your candidate eligibility reporting and will be invoiced.

Remember that Per Capita Completion Reporting Fees are non-refundable.

[Confirm](#) [Cancel](#)

3. After clicking on the **Confirm** button, the invoice will be created, and the program would click on the **Pay This Invoice Now** button to issue payment.

MY CFP BOARD ACCOUNT

REGISTERED PROGRAM ACCOUNT

Billing Information

Invoices

Open Credits

Program Management Profile

Eligibility Reporting

CCI Report

Exam Report

NEED HELP? CONTACT US.

Upload Eligibility Submission - Confirmation

Congratulations on submitting your eligibility. An invoice has been created for the eligibility records submitted.

Please click the **Pay This Invoice Now** button to complete your payment. You may click the See All Open Invoices to view this invoice and any other open invoices to pay.

Click the Upload Another Batch File link to submit more eligibility.

[Upload Another Eligibility Batch File](#)

INVOICE

Invoice #: 3101385
Invoice Date: 02/28/2023
Invoice Terms: TestRPTerms
Due Date: 03/02/2023

[Pay This Invoice Now](#)

[See All Open Invoices](#)

Description	Quantity	Price	Discount	Amount
Per Capita Fee for Reported Student Completions (Batch ID: 16602)	5	\$195.00	\$0.00	\$975.00

Invoice Total	\$975.00
Taxes	\$0.00
Amount Paid	\$0.00
PLEASE PAY	\$975.00

Batch ID: 16602
Upload Date: 2/28/2023 16:03
Add User: web:zzaginochio@cfpboard.orgzz

Total Reporting: 5

Billable Reporting: 5

First	Last	Student ID	CFP ID	SSN	Start Date	Completion	Email	Status
Hank	Pym		482777		1/1/2020	12/31/2022	zzhpym@stage.eduZZ	Billable
Anthony	Stark	2008			1/1/2021	12/31/2022	zzaestark@stage.eduZZ	Billable
Robert	Banner			6347	6/1/2020	5/30/2022	zzrbanner@stage.eduZZ	Billable
Wanda	Frank				9/1/2019	5/30/2022	zzwfrank@stage.eduZZ	Billable
Jacqueline	Duquesne	287500			1/1/2020	5/30/2022	zzjduquesne@stage.orgzz	Billable