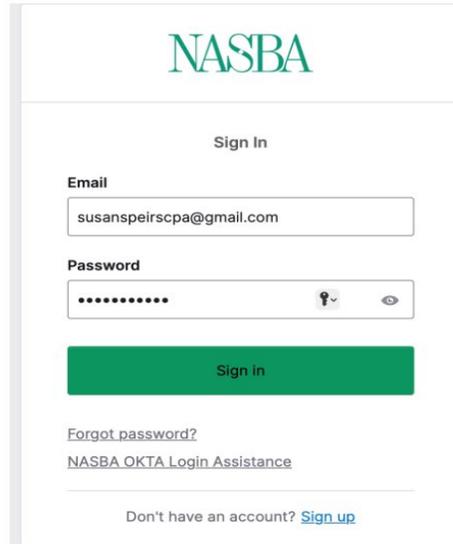


Step by Step CPE



The screenshot shows the NASBA Sign In page. At the top is the NASBA logo in green. Below it is the text "Sign In". There are two input fields: "Email" with the value "susanspeirscpa@gmail.com" and "Password" with a masked password ".....". To the right of the password field are icons for a key and an eye. Below the fields is a green "Sign in" button. At the bottom, there are links for "Forgot password?", "NASBA OKTA Login Assistance", and "Don't have an account? Sign up".



Pretty self explanatory. The password will change every 90 days.

Step by Step CPE



Utah | License Number 159428-2601 **ACTIVE**

License Issue Date Sep 21, 1988

Compliance Status ⓘ

✓ Compliant

Last Calculated: October 3, 2024 02:35:42 PM

Jan 01, 2023 - Dec 31, 2024

[Go to all reporting periods](#)

Remaining Duration

2 months, 16 days.

[Requirement Summary](#) ▶

[View Details](#)



Once you log in, this page will come up. If you click on “View details” the next page will appear.

NSIP cpeauditservice Home Licenses SUSAN A SPEI

Utah | License Number
 License Issue Date Sep 21
 Compliance Status **Compliant**
 Last Calculated: October 3

Requirement Summary ▶

Jan 01, 2023 - Dec 31,
 Go to all reporting periods
 View Details

Jurisdiction Info ×

Utah Board of Accountancy

- **Address:** PO Box 146741, Salt Lake City, UT 84114-6741
- **Phone:** 801.530.6628
- **Fax:** 801.530.6511
- **Email:** b6@utah.gov
- [Update Personal Contact Information with the Board](#)
- [Rules & Regulations](#)

CPE Requirements Summary:

License Renewal:

- **Date:** 12/31
- **Type:** Biennial
- **Schedule:** Even Years

CPE Reporting Period:

- **Dates:** 1/1 to 12/31
- **Type:** Biennial Fixed
- **Schedule:** Even Years

Initial Period Requirements:

Requirement	Hours
No Requirements	N/A

- **Earning Period:** Credits must be earned between license date and end of reporting period.
- **Proration:** No requirements during initial biennial reporting period. If



This gives info as to where you can go for questions at the state level. The [B6@utah.gov](mailto:b6@utah.gov) is a monitored e-mail address.

January 01, 2023 to December 31, 2024
Time Remaining: 5 months, 2 days.

Compliance Status 
●●● In Progress

Last Calculated: May 31, 2024
10:55:57 AM

Attention:

Carry Credit: The Utah Board of Accountancy will NOT REQUIRE any credits carried from the 2021-2022 Reporting Period to the 2023-2024 Reporting Period to be entered into CPE Audit Service UNLESS you are selected for an audit of your CPE. If you are selected for an audit, you should be prepared to enter all credits earned for the 2023-2024 period and any credits earned in 2021-2022 that were carried forward to the current cycle. While the Board is not REQUIRING the previous year's entry, if you have carry hours you want calculated in the new period, then you will need to enter all hours individually for the 2021-2022 reporting period.

CPE FAQs: For questions regarding CPE Requirements, please review the [CPE FAQs](#) provided by the Utah Board of Accountancy.

If you missed our webinars on CPE Credit Entry in January, you can view the [January 17th session](#).

Tip for Uploading Course Attachments: Before uploading a file from your computer, please ensure that the filename includes only alphanumeric characters and does not include punctuation, special characters, or symbols as these may prevent a successful file upload.

Overview Compliance Report Missing Information Notes

 Export  Print

Requirements Summary Credit Adjustments 

Carry Credit ... 

Requirements	Required	Carried	Earned	Short	Available Carry 	Requirement Met?
--------------	----------	---------	--------	-------	---	------------------



This is the next page.

Export Print

Requirements Summary Credit Adjustments **58**

Carry Credit ...

Requirements	Required	Carried	Earned	Short	Available Carry →	Requirement Met?
Total Hours	80	0	129		40	✓
Ethics	3	0	9.5		6.5	✓
UT Rules and Regulations	1	0	2		1	✓

Add Credit

Add or Update Attachments for Course All

<input type="checkbox"/> Date	<input type="checkbox"/> Title	<input type="checkbox"/> Course Number	<input type="checkbox"/> Provider	<input type="checkbox"/> Delivery Method	<input type="checkbox"/> Program Type	<input type="checkbox"/> Total Earned
<input type="checkbox"/> Oct 3, 2024	<input type="checkbox"/> 1 2023 AICPA & CIMA National Tax and Sophisticated Tax Conference		AICPA	Group Live	AICPA and State Society Programs	9
<input type="checkbox"/> Sep 16, 2024	<input type="checkbox"/> 1 AICPA Town Hall Series 09162024		AICPA	Group Internet-Based	AICPA and State Society Programs	1
<input type="checkbox"/> Sep 11, 2024	<input type="checkbox"/> 1 Social Security		Utah Association of Certified Public Accountants (UACPA)	Group Internet-Based	AICPA and State Society Programs	1



A you scroll down from the previous page, you will see a summary of your credits. This causes confusion to a lot as this isn't how CPAs read reports. Everything rolls up into the Total hours. There is no carryforward on Ethics or Utah Laws and Rules. NASBA is indicating that the overage is included in the "Earned" credits.

If members ask, there is no carryforward for Ethics or Utah Laws and Rules. If extra credits are taken, they should be counted in the regular CPE hours. There is a maximum of 40 hours carryforward that will go into next year.

If a person renews their license before the end of the year, and takes additional CPE and reports it, it's supposed to roll into the next reporting period – we'll see if that really happens.

Add Attachment

Upload new from computer Associate existing attachment

or drag and drop files here to upload

Upload file from your computer (jpg, png, doc, xls or pdf). Max file size 10MB.

Select Delivery Method ?

- Group Live
- Group Internet-Based
- Blended Learning
- Nano Learning
- Interactive Self Study
- Non-interactive Self Study
- QAS Self Study
- Other Learning Activity (APM / CPE Technical Reviewer / Practice Review)

Select Program Type ?

You can drag the CPE certificate over to the top box as you begin to input CPE.

You must select a “Delivery Method” and program type in order to proceed.

Select Program Type ?

AICPA and State Society Programs

Professional education and development programs offered by the American Institute of Certified Public Accountants (AICPA) or any state CPA Society.

Enter Credit Detail for AICPA and State Society Programs Courses

* Title

* Start Date ?

mm/dd/yyyy

* End Date ?

mm/dd/yyyy

* Country ?

Select a country...

* State/Province ?

* Provider ?

To search for a provider, please type in the provider name or the NASBA Registry Sponsor ID.

Select a provider...

If your provider is not found, add a new provider below.

Add Provider

Is this provider registered with other Boards or agencies? If yes, add a new registration below.

Add Registration

This is pretty self explanatory. We have added UACPA and Utah Association of Certified Public Accountants. We have asked that the system utilize machine learning.

Add Subject Area

Subject Area 
Select a subject area... 

CPE Credit 

Add Subject Area

Subject Area	Reported Hours	
Behavioral Ethics	4	 
Regulatory Ethics	1	 

« Previous **1** Next »

Showing 1 to 2 of 2 entries

Show 25 entries

Notes

 **Add Notes**



When reporting for Ethics, you need to select Behavioral Ethics from the drop down. In the CPE credit box, type in how many hours and then click subject area. For Utah Laws and Rules, choose Regulatory Ethics and again add the hours and click on add subject area. You should get the next slide...

Side note – you have to click on the add subject area with each set of CPE you’re reporting. This is throwing a lot of people off. In my opinion, the box is in the wrong place.

Subject Area	Reported Hours
Behavioral Ethics	1

« Previous 1 Next »

Showing 1 to 1 of 1 entry

Show 25 entries

Course Questions

• Course/Credit Questions

Utah Association of Certified Public Accountants (UACPA) - No Course Number - Utah Laws and Rules - 07/29/2024

Does the content of this course include at least one hour of education on the Utah Certified Public Accountant Licensing Act and Certified Public Accountant Licensing Act Rule? If you are unsure, please review the board's [website](#).

Yes

No

Notes



For the ethics CPE, after the subject is chosen, this box should appear. Sometimes it does, sometimes it doesn't.

Add or Update Attachments for Course

All

<input type="checkbox"/>	Date		Title	Course Number	Provider	Delivery Method	Program Type	Total Reported	
▶	<input type="checkbox"/>	Oct 3, 2024	1	2023 AICPA & CIMA National Tax and Sophisticated Tax Conference	AICPA	Group Live	AICPA and State Society Programs	9	⋮
▶	<input type="checkbox"/>	Sep 16, 2024	1	AICPA Town Hall Series 09162024	AICPA	Group Internet-Based	AICPA and State Society Programs	1	⋮
▶	<input type="checkbox"/>	Sep 11, 2024	1	Social Security	Utah Association of Certified Public Accountants (UACPA)	Group Internet-Based	AICPA and State Society Programs	1	⋮
▶	<input type="checkbox"/>	Aug 14, 2024	1	UACPA Update - Lecture Series	Utah Association of Certified Public Accountants (UACPA)	Group Internet-Based	AICPA and State Society Programs	1	⋮
▶	<input type="checkbox"/>	Aug 1, 2024	1	AICPA Town Hall Series	AICPA	Group Internet-Based	AICPA and State Society Programs	1	⋮
▶	<input type="checkbox"/>	Jul 29, 2024	0	Utah Laws and Rules	Utah Association of Certified Public Accountants (UACPA)	Group Internet-Based	AICPA and State Society Programs	1	⋮
▶	<input type="checkbox"/>	Jul 18, 2024	0	AICPA Downhill Series 07-18-2024	AICPA	Group Internet-Based	AICPA and State Society Programs	1	⋮
▶	<input type="checkbox"/>	Jun 7, 2024	1	2024 June Leadership Council	Utah Association of Certified Public Accountants (UACPA)	Group Live	AICPA and State Society Programs	5	⋮
▶	<input type="checkbox"/>	May 10, 2024	1	2024 Taxes Now Conference	Utah Association of Certified Public Accountants (UACPA)	Group Live	Committee Meetings	4	⋮
▶	<input type="checkbox"/>	May 10, 2024	1	2024 Taxes Now Conference	Utah Association of Certified Public Accountants (UACPA)	Group Live	Other Organization's Programs	4	⋮
▶	<input type="checkbox"/>	Mar 21, 2024	1	2024 AICPA Regional Council	AICPA	Group Live	AICPA and State Society Programs	4.5	⋮
▶	<input type="checkbox"/>	Feb 29, 2024	1	AICPA Town Hall Series	AICPA	Group Internet-Based	AICPA and State Society Programs	1	⋮



If the box doesn't appear, go into the main screen and edit the class and the screen will appear.

You will click on the 3 dots on the right hand side of the page. There will be an edit symbol. From that point you can re-enter the class and the question box will appear. A pain – I know. 😞