

Plan Sponsor Council of America

CE Summary and Self-Reporting Job Aid

Below are instructions for using the PSCA CE Summary and self-reporting tool

1. Login (https://asppa.personifycloud.com/PersonifyEbusiness/My-Account) to your PSCA Account. Enter your username and password to gain access to your My Account page.

Use the Forgot Username? Or Forgot Password? links to find your username or reset your password.

Login	
Username:	
Password:	
Remember Login	
Login	Register
Forgot Password ? Forgot Username ?	

2. On the My Account Page, navigate to the left side bar and select "**CE Tracking**" under the heading "**Education**".





3. On the New CE Summary page, review CE Credit totals located under **Outstanding** and **Earned** column headings. When you are ready to self-report CE credits, click the "**Manage Self-Reported Credits**" link above the table or "**Self-Reporting Credits**" link from the left side bar.

My Account	Home > My Account >	New-CE-Summary		
New CE Summary	New CE Sum			
Self Reporting Credits	New CE Sum	mary		
ASPPA CE Policy	Manage Self Reported Credits			
NAPA CE Policy	Organization/Type	Earned	Outstanding	Complete by
CE Reports				
My Learning Activities				

4. Click "Add" to add a self-reported program.

My Account	Home > My Account > Self Reporting Credits
New CE Summary Self Reporting Credits ASPPA CE Policy	Self-Report CE Credit
NAPA CE Policy CE Reports My Learning Activities	ADD Date Transcript Activity Description Ethics Relevant Topic #Credits Action

5. Fill in all fields and choose a CE type – **Professional, Ethics, or Relevant Topics,** If you need additional information about which CE type is appropriate for your program, mouse over the **1** icon for more information.

	Self-Report	t CE Credit
Any information entered here r reported CE records are subje the program. Once submitted, page	nust be correct and accurate, a ct to audit, and records of comp entries can be edited using the	nd comply with the ARA Code of Professional Conduct. All self- leted programs must be kept for four years after completion of "Edit" and "Delete" options on the "Self-Reporting Credits"
O Professional C Ethics	Relevant Topic	
Transcript Activity Description		(required)
Dates		(required)
# of CEs		(required)

- 6. When you have entered the data for your CE program, click the "Save" button.
- 7. When saved, you will see a summary of the entered program information. Review it and use the "Edit" or "Delete" buttons to modify or remove the program you entered.
- 8. Click "New CE Summary" on the left side bar and verify that the "Earned" and "Outstanding" credits are now updated.
- 9. Review <u>PSCA's CE Policy</u>.

Need additional support or have questions? Reach out to <u>customercare@psca.org</u>.