

# Continuing Education Course Timeline

**All forms are due to NAIFA-California by time indicated below. This allows enough turn around time between the local, NAIFA-California and the California Department of Insurance (CDI).**

NAIFA-California will sign as the Provider and forward the items to the CDI. NAIFA-California and the California Department of Insurance (CDI) are not responsible for forms that are completed improperly or filed improperly and will return them. If this occurs, the delay may make your filing time too late to receive CE credit.

1. Select course(s) desired to be presented from the [Approved CE Courses](#) list
2. Contact an instructor, discuss and confirm their availability to present selected course
  - a. Instructor must have 3 years experience in the course subject matter within the last 5 years and have a [Instructor Qualification Form](#) on file at NAIFA-California. Copy and use the Instructor Qualification Form as necessary for each instructor. Instructors may submit one form listing multiple courses.
  - b. Return completed [Instructor Qualification Form](#) to NAIFA-California for each instructor accompanied by a Class Presentation Schedule
3. Find and book a location, set the date and time to present the course
  - a. Advertise the course regularly in your local newsletter, email and website
  - b. Keep a copy of registration forms you receive

## 4. 3 Weeks (21 Days) BEFORE Course Presentation

[Class Presentation Schedule](#) is due

Students will not receive credit for attending course if this form is not filed on time.

Any changes in location, date or time requires a new [Class Presentation Schedule](#) to be filed, checking the applicable box on the form. Copy and use Class Presentation Schedule as necessary for each course being offered.

- a. Send completed [Class Presentation Schedule](#) to NAIFA-California

## 5. Day BEFORE Course Presentation

Generate [Certificate of Completion](#)

A certificate must be provided to each student successfully completing the course. Certificates should be generated prior to course presentation.

- a. Open the [Certificate of Completion](#) template, save to your system, edit and use as necessary for each course being offered
- b. Input the correct course number, course name, date, time and location as necessary for each course, refer to information provided in [Approved CE Courses](#)
- c. Instructor signs and copies [Certificate of Completion](#) as necessary for distribution at the end of each course to each student successfully completing the course

## 6. Day Of Course Presentation

[Course Attendance Record & Verification Form](#) is completed & signed

- a. Copy and use [Course Attendance Record & Verification Form](#) as necessary for each course being offered
- b. The Instructor must complete and sign Verification Form section
- c. If Annuities 101 or California Healthy Families course, collect course fees as students arrive for the course
- d. As students arrive for the course they must complete and sign the Course Attendance Record Sheet section. Each student MUST LEGIBLY PRINT their name, SIGN IN and OUT, with the correct time

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and provide their Social Security Number and/or license number or they will not receive CE Credits.

- e. Distribute signed [Certificate of Completion](#) at the end of the course to each student successfully completing the course. Compare number of certificates distributed to number of people on your [Course Attendance Record & Verification Form](#).

## 7. No Later Than 2 Weeks (14 Days) AFTER Course Presentation

[Course Attendance Record & Verification Form](#) is due WITH

Typed [Provider Roster](#)

Students will not receive credit for attending course if this form is not completed and filed on time.

Return completed, signed [Course Attendance Record & Verification Form](#) to NAIFA-California accompanied by typed [Provider Roster](#) (and course fees if Annuities 101 or California Healthy Families course).

- a. Open the [Provider Roster](#) template, save to your system, edit and use as necessary for each course being offered
- b. Input the correct course number, course name, date, time and location as necessary for each course, refer to information provided in [Approved CE Courses](#)
- c. Input student information referencing the signatures on the [Course Attendance Record & Verification Form](#)
- d. Return completed typed [Provider Roster](#) to NAIFA-California accompanied by completed and signed [Course Attendance Record & Verification Form](#) (and course fees if Annuities 101 or California Healthy Families course)
- e. NAIFA-California will forward your typed Provider Roster with a required accompanying form to the CDI for CE processing purposes

## 8. Record Keeping AFTER Course

Students taking approved CE courses should maintain, for a period of five (5) years, their Certificate of Completion with the course name, course number, date and the location where course was held.

Certificates with this information should be made available, as necessary, to the Insurance Commissioner to verify completion of continuing education requirements.

The information detailed on the Certificates of Completion will be used when referencing verification of attendance by the [California Department of Insurance](#) and NAIFA-California.

## New Courses

If you have a new course you would like to have approved for CE's, you may submit it for approval by providing the completed items below to NAIFA-California. New course approval timeline is a **minimum of 60 days** and can take **up to 90 days**. You must have new course approval before the course is taught or the students will not receive credit.

### 3 Months (90 Days) BEFORE Course

1. Complete CDI [Course Approval Application](#)
2. Provide check payable to CA Department of Insurance for filing fee (see form for amount)
3. Provide detailed outline of approximately one page per hour of instruction, including the time of each topic being presented
4. Provide copy of complete course material for NAIFA-California files (preferred electronic version if possible)
5. Complete CDI [Instructor Qualification Form](#)