



Annual Report Information and Instructions

General Information:

The purpose of the **CE Sponsor Approval Annual Report** is to provide information about the activities offered over the past year, those intended for the upcoming year and their corresponding promotional materials. Promotional materials include items such as brochures, pamphlets, and emails used to promote CE programs, and may also include web pages used to promote or provide additional information about programs. **Promotional materials are required to be submitted with the annual report and must be submitted in .pdf format.**

Please note that our office receives an extremely high volume of reports throughout the year (i.e., over 1,000 annual and review reports). Importantly, our objective is to provide you with thorough and thoughtful feedback that will be useful for your ongoing development of promotional materials, and future submissions of annual reports and renewal applications. Such analysis requires time however, and thus feedback on your reports/responses may not be received for up to three months. We sincerely appreciate your patience in this process.

Date Range of Programs

For Spring Cycle Sponsors: Please list each of the activities your organization has offered (including co-sponsored activities) for CE credit to psychologists from February of last year through January of the current year.

For Fall Cycle Sponsors: Please list each of the activities your organization has offered (including co-sponsored activities) for CE credit to psychologists from August of last year through July of the current year.

For your multi-session programs (e.g., conventions, conferences) where credit was earned on a session-by-session basis, you must enter each of the individual sessions that were available for credit.

Co-sponsorship (if applicable) – Co-sponsorship should be understood as the mutual planning of an activity by two or more organizations. It is the responsibility of the approved sponsor to ensure that all the [Standards and Criteria for the Approval of Sponsors](#) are met.

Submission how-to / instructions:

Sponsors are required to submit Annual Reports online via the [CESA Online Application System](#). Once inside the OAS, the 'Actions in Progress' section will indicate the Details (e.g., Annual Report), Status (e.g., Not Started), CESA Item (e.g., Spring 2022 Report for [*sponsor organization name*]), and Due Date (e.g., 2/28/2022).

Submission of both the Annual Report and corresponding Payment may be submitted via the provided links.

From the Annual Reports tab, you will see the following under 'Guidance' at the top of the page:



Instructions

1. Review the CESA Instructions for Annual Reporting
2. Select "Add New Activity" to enter all CE programs offered within this Annual Report period (as specified within 'Date Range of Programs')
3. Click "Manage Attachments" to upload attachments. You may also use this to view all attachments already uploaded
4. Select "Browse" to open a dialog box allowing you to select .pdf files from your computer for upload
5. Once all files to be uploaded have been selected, the "Upload" button will need to be selected to begin uploading the documents into the system
6. Click "Manage" next to the specified "Activity Title" you have entered and make any edits where applicable
7. If applicable, enter any Future Intended Activities

Notes

1. The CESA OAS system will only accept attachments in **.pdf** format.
2. Only materials classified as "promotional materials" should be included with your submission. Please see the definition above for further clarification on what constitutes a promotional material.
3. As promotional materials are required for each CE program, please ensure there is an accompanying explanation in the activity's 'Notes' section if you are unable to provide the required materials for the specified program
4. For promotional materials including multiple activities (e.g., conferences), please include a comment in the 'Notes' section explaining this or other pertinent information the CESA Office should know

Submitting a Report

Some sponsors may want to submit their annual reports early (e.g., if you KNOW that you will not be conducting events after the point that you submit your report prior to the due date). Please ensure you submit your annual report no more than 30 days before your due date to ensure that all annual report activities are provided for review.

What do I do if I have no activities to report?

1. Click on "Submit Annual Report". You will see a pop-up that effectively asks if you are sure that you want to submit a report without inputting any data or attachments.
2. If you are sure, then click "Continue with Submission"

What else might I need to know?

Annual reports are available for sponsors to complete all year-round. It is **highly recommended that sponsors update their report throughout the year** to ensure this process is completed before the deadline.



Approval Decision	Sponsor Responsibilities
1-year approval decision	(i) Pay requisite annual fee (ii) When applying for renewal, please ensure you refer to feedback provided in the Review Report to complete your renewal application
2-year approval decision	(i) Pay requisite annual fees (ii) Submit your annual report by the designated deadline (iii) When applying for renewal, please ensure you refer to feedback provided in the Review Report to complete your renewal application
5-year approval decision	(i) Pay requisite annual fees (ii) Submit your annual report by the designated deadline for your respective years of approval (iii) When applying for renewal, please ensure you refer to feedback provided in the Review Report to complete your renewal application

Once your report is fully submitted for the relevant cycle, a record of your most recently submitted annual report will be available via Read Only.

During the year that approved sponsors are due to renew applications, the Annual Report form will not be available for completion (because this is not a relevant document based on your current status).

As a reminder, if you are a currently approved sponsor, then you are eligible to submit a Homestudy Supplemental Application if you meet the following criteria:

- (1) you are a currently approved sponsor who is not already approved to conduct Homestudy programs
- (2) the length of your current approval extends beyond the date for which you would begin conducting Homestudy programs IF approved (i.e., you must be approved for the CESA main application in order to also be approved via the Homestudy Supplemental Application process)
- (3) you have paid the requisite fee for the Supplemental Application*

*Note: Similar to other applications, the Homestudy Supplemental Application will only be accepted and reviewed during regularly scheduled cycles.

If you have any questions, please reach out to our office via [email](#).