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 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 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. First, you will need to [login to the system](#). Once inside the OAS, your Action Center will indicate the Details (e.g., Annual Report), Status (e.g., In Progress), CESA Item (e.g., Spring 2017 Report for [sponsor organization name]), and Due Date (e.g., 2/28/2017).

Click on ‘Annual Report’ to begin the process – and **remember to also provide payment** via the ‘Payment’ hyperlink.

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. Enter all Current Activities you have completed for this Annual Report period
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 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 that are in .pdf format. Only materials classified as "promotional materials" should be included with your submission. Please see the hyperlink above for further clarification on what constitutes a promotional material.
2. If an activity has no corresponding attachment(s), please ensure there is an accompanying explanation in the activity's notes
3. 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
4. Although there is no way to directly connect promotional materials to activities in the system, the checkbox can be used for the sponsor's benefit to ensure materials for all activities are successfully attached
5. In some instance, sponsors may want to submit a brief explanatory document that lists each activity and its corresponding promotional material, or other information the CESA Office should know (e.g., clarification for multiple events relating to a single promotional material or, conversely, explanation that there are multiple materials relating to a single event). This is not required but may be useful for providing an outline or structure to guide our office when reviewing your materials

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. This will ensure that all annual report activities are provided for review.

What do I do if I have no activities to report?
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. 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 records throughout the year** to ensure this process is completed before the deadline.

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

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 send our office an email or contact us via telephone at (202) 336-5991, Option 1.