CHAPTER EVENT CHECKLIST

Please use the following as a guide to set up your chapter event with National. All forms are located on the chapter leader resources page at IASA.org or by the links provided in this form. Recommended dates for submitting and any required blackout dates are included below. Submit all forms to Gina Jolly.

1.   Notify National of any chapter event dates as soon as possible so we can approve the dates and include in all marketing materials as able. Please reference blackout dates

2.   Complete Chapter Event Request Form with as much detail as possible. Form should be submitted no later than 60 days prior to event date to ensure marketing of event. This form will provide all details needed to open registration, set up marketing, sponsorship, and exhibitor tickets. Please be sure to include with submission all venue details such as venue photo, address, venue description and verification of venue approval to use photo.

   a. Exhibitors will register on-line just as attendees once package is set up in the registration system. All exhibitor benefits will be fulfilled by the chapter and Exhibitors should work directly with the chapter not National.
   b. Sponsors will register by simply sending an email to Gina Jolly to process payment and logo placement. Once registration is complete sponsors will work directly with the chapter for all benefits received.

3.   Review all NASBA requirements based on type of event to ensure you provide all required items no later than 2 weeks prior to event date. NASBA Group Live NASBA Group Internet

4.   Send all speakers the "Speaker Form Link" below to complete within 30 days prior to event. This link will allow them to provide their headshot, Bio, Learning Objectives and Session descriptions on one form. The form will come directly to National, and we will copy the chapter when received. This form also serves as an agreement to speak at the chapter event. This form is now required for all speakers. https://www.emailmeform.com/builder/form/48ZDalKa32aCV0Bx If all items are not provided for the session prior to the event the session will not be eligible for CPE. The chapter should review items sent to ensure accuracy for CPE.

5.   Send all speakers the "Review Form Link" to have the presentation reviewed by a qualified individual not involved in the development of the presentation. This should be completed within two weeks of the event and before the presentation is submitted. https://www.emailmeform.com/builder/form/iuX4AvOaT0

6.   Provide a complete agenda no later than 2 weeks prior to event date to include final session title, speaker name, session dates and times, any prerequisites. An agenda template is available if needed on the Chapter leaders resource page under events.

7.   Complete the CPE Submission Request no later than 2 weeks prior to the event date. You must provide all prerequisites for any CPE's that are Intermediate or Advanced level. No prerequisites are required for Basic level. If a field of study is not provided it will automatically defer to an accounting credit.

8.   Send all speaker presentations and handouts to [Gina Jolly](#) within 1 week prior to the event. All presentations should be sent in original power point format. These files will be converted to PDF prior to uploading to the event site. All handouts should be sent in PDF format ready for upload.

9.   Event registration lists will be sent to chapter weekly on Monday's once registration is open. A final registration list and any other necessary documents will be provided 48 hours prior to the event and if necessary 24 hours prior to the event.

10.   24 hours prior to any in-person event an email will be sent to all attendees by National to provide them with the link to complete a CPE Verification Form for the sessions attended. All attendees who need CPE will need to complete the form within one week of the event and have signed into the sessions to be eligible for CPE. The form will auto submit to National.

11.   Chapters are required to send all necessary documents to [Gina Jolly](#) following the event for CPE's to be processed timely.

   a. Virtual events require all zoom reports (attendance and polling) for each session to be sent to [Gina Jolly](#) within 48 hours after event.
   b. In-person events require all sign in sheets to be scanned and emailed to [Gina Jolly](#) within 48 hours following event. The CPE Verification Form to be completed by attendees and submitted within one week (see above #10).
   c. If National provides chapter banking and invoices or expenses need to be paid those should be submitted to [Gina Jolly](#) within one week after the event for us to process the closing documents.

12.   Events financials will be finalized and sent to National Accounting the month following the event for processing. National will strive to close the accounting and provide payment within 90 days of the following event. If chapter owes monies to National payment should be submitted within 30 days of receipt of final accounting of event.