



CPE Policies

Record Retention Policy

The CPE Coordinator will retain record of attendance for five (5) years. The retained information will include:

- Records of participation.
- Dates and locations.
- Author/instructor, author/developer, and content reviewer, as applicable, names and credentials. For the CPA and tax attorney acting as an author/instructor, author/developer, and content reviewer for accounting, auditing, or tax program(s), the state of licensure, license number, and status of license should be maintained. For the enrolled agent acting in such capacity for tax program(s), information regarding the enrolled agent number should be maintained.
- Number of CPE credits earned by participants.
- Results of program evaluations.
- Program descriptive materials (course announcement information)

Cancellation Policy

HEUG reserves the right to cancel an event due to low enrollment or other circumstances which would make the event non-viable. If HEUG cancels an event, registrants will be informed as soon as possible through the listed email address on their registration form. There will be no refunds offered for cancelled events since there are no fees associated with registration. Should circumstances arise that result in the postponement of an event, registrants will be automatically rolled into the new event.

Complaint Resolution Policy:

For more information regarding administrative policies such as complaints, please contact [HEUG Support, support@heug.org](#)

CPE State Requirements:

Each State Board of Accountancy (SBA) maintains different standards for CPE credits. CPE sponsorship by a given SBA does not imply endorsements of the merits or quality of E-Academy Programs. It is the responsibility of attendees to become familiar with the standards and procedures of their state's SBA.

CPE Fields of Study:

Business Management and Organization, Computer Software and Applications, Information Technology, Management Services, Personal Development, and Personnel/Human Resources

CPE Prerequisites

Sessions with Intermediate, Advanced, or Update knowledge level require a prerequisite (previous education, work experience, background knowledge). If the knowledge level is Basic or Overview and no prerequisites are required, please state "None". To update this information within your session, please contact support@heug.org.