

Information  
for Certification  
Maintenance  
Program Providers

HANDBOOK

This handbook contains valuable information regarding the Certification Maintenance program. Please review it carefully before addressing questions to AICP.



The American Planning Association's  
professional institute  
**American Institute  
of Certified Planners**

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*Note: This PDF document contains hyperlink references. If you are viewing the document on a computer connected to the internet, click the table of contents or [blue highlighted text](#) to jump to the reference within the document or launch the reference in your web browser.*

# GENERAL INFORMATION

## **American Planning Association**

The American Planning Association (APA) brings together thousands of people—practicing planners, citizens, elected officials—dedicated to making great communities happen. APA is a nonprofit public interest and education organization committed to urban, suburban, regional, and rural planning. APA's professional institute, the American Institute of Certified Planners (AICP), provides leadership in professional development, ethics, and the standards of planning practice.

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[AICPCM@planning.org](mailto:AICPCM@planning.org)  
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## **Certified Planners**

Certified planners are members of APA's professional institute, AICP. They have demonstrated a commitment to high standards of professional practice and a mastery of theories and tools of planning. To become certified, an APA member must meet requirements for education and experience, pass the AICP Comprehensive Planning Examination, and pledge to uphold ethical standards and engage in ongoing professional development. The AICP Code of Ethics and Professional Conduct helps certified planners uphold those ethical standards. AICP's Certification Maintenance program helps them engage in ongoing professional development. Under the Certification Maintenance program, certified planners engage in 32 hours of professional development every two years.

Details about the AICP Code of Ethics and Professional Conduct are at [www.planning.org/AICP](http://www.planning.org/AICP).

Details about the Certification Maintenance program are at <http://www.planning.org/cm/>.

# PROGRAM OVERVIEW AND HISTORY

## What is Certification Maintenance?

On January 1, 2008 it became required for all professional planners who are members of APA's professional institute, the American Institute of Certified Planners (AICP), to engage in mandatory continuing education. AICP members must earn a total of 32 Certification Maintenance (CM) credits every two years to maintain their AICP credential.

The Certification Maintenance program links certified planners to training opportunities that will keep them up-to-date with the latest trends, technologies, and best practices.

Continuing education activities and events that will provide these CM credits must be approved by APA. All education providers, including APA and its chapters and divisions, must register with APA/AICP to become CM providers.

When you register to become a CM provider, we'll market your activities so all AICP members know about your CM-approved activities through our online calendar of events (Link to calendar). You will also be included in our online directory of CM providers (Link to list of CM Providers). Whether you're hosting a conference, workshop, lecture, or web-based training (i.e. online course, webcast, podcast, etc.) this is your opportunity to reach more than 16,000 professional planners who are looking for professional development activities.

## Who is eligible to be a CM provider?

Any organization that provides educational activities or products for professional planners can become a CM provider. These include (but are not limited to):

- APA Chapters and Divisions
- Nonprofit organizations
- Professional training services
- Government entities
- Private firms or companies
- Universities and academic institutions

## What are the benefits of becoming a CM provider?

Some benefits of being a CM provider include:

- Expanded listings on APA's online calendar of events
- Inclusion in the online directory of registered CM providers
- Use of the CM logo in marketing and promotional materials
- Feedback from attendees offered through our automated rating mechanism
- Partnership opportunities with APA and its Chapters and Divisions

## What kinds of educational activities are eligible for CM credit?

We encourage CM providers to register educational activities of all types, as long as they meet the [CM criteria](#). These include (but are not limited to):

Face-to-face or real-time activities:

- Conferences
- Audio/web conferences
- Workshops (including mobile workshops)
- Lectures, keynote speeches, and symposia
- University courses
- Book clubs and facilitated discussions

Distance Education (asynchronous) activities:

- CD-ROMS
- Online courses
- Podcasts, Telecasts

# BECOMING A PROVIDER

## How to Become a Provider

Every provider of education who wishes to become a registered CM provider must purchase an annual \$95 registration that enables them to register events for CM and publicize itself as a registered CM provider for a period of one year (calendar year). A provider may then select the payment plan or plans that best suit its training needs and for which it is eligible based on organization type. Please note: both registration and payment plans are non-refundable. Any non-annual unlimited plan may be upgraded throughout the year.

## To register as a CM provider, you will complete the following steps:

Step 1: Determine [type of organization](#).

Note: you will need your organization's Tax ID to verify your provider type (non-profit, college/university, government, private firm/other). Nonprofits are classified as 501(c) (1) to 501(c) (28).

Step 2: Create a provider record in our database, either by linking to an existing record or creating a new record.

Step 3: Select a registration year.

Step 4: Select [payment plan](#).

Step 5: Set up contact and billing information.

Step 6: Begin registering events for CM credit. [Click here](#) to begin the online registration process.

## Registration Payment Plans

Selecting the right registration payment plan is an important consideration in becoming a CM Provider. Please think carefully about what works best for your organization's needs.

If you offer multiple events a year, an annual unlimited payment plan may be the best option. For example, a small non-profit organization offering a three-hour event six times per year might consider the more cost effective approach of purchasing an [unlimited annual payment plan](#) for \$900 rather than buying credits on a per-credit plan (\$50 per credit hour x 3 hours = \$150 x 6 times within the year = \$900). By purchasing the unlimited annual payment plan, the provider has the opportunity to register these and any other events for the entire year.

Unlimited daily and weekly payment plans work well for conferences with multiple concurrent sessions.

Purchasing credits on a per-credit plan may be best if this is the first time you are offering credits to AICP members or offer few events per year.

Please [contact us](#) at [AICPCM@planning.org](mailto:AICPCM@planning.org) if you have any questions on choosing the right payment plan.

There are four organization types. For full information about plan options and pricing for your organization type, visit <http://www.planning.org/cm/activities/payment/index.htm>.

- [Private Firm/Other Provider](#)
- [Government Provider](#)
- [College/University Provider](#)
- [Non-Profits](#) (including APA Chapters and Divisions)

## Special Bonus for Annual Unlimited Payment Plans

Providers who have “partners” or “departments” within its organizational structure may choose to purchase a separate Provider Number for an additional \$95 fee per partner.

This allows each partner to share registration powers under one unlimited annual payment plan rather than needing to purchase individual annual unlimited payment plans. This is limited to partners that share either the same Tax ID (e.g. a planning firm with several locations, a division within a organization, a campus or department within a university, etc.) or fit within a governmental structure that recognizes a similar status (e.g. municipal departments or agencies).

Contact [AICPCM@planning.org](mailto:AICPCM@planning.org) for more information.

# REGISTERING AN EVENT

## Registration Overview

First, become a CM Provider. Several payment plans are available depending on your type of organization. Please also review the criteria for CM approval and [template for gathering event information](#) before you begin registering your event for CM credit.

After registering your event, you will receive an email from APA that your event has been approved/denied or needs more information. The [CM provider dashboard](#) is your resource for updates on event status.

*Note: Your event will be reviewed within a three week window of time*

## How CM Credits Are Measured

CM credits are measured in contact hours, so that one hour of instructional time equals one hour of CM credit (1 contact hour = 1 CM credit, 1.5 contact hours = 1.5 CM credits). An event must be at least 1-hour in duration to be eligible for CM credit.

Non-instructional activities or breaks (i.e. eating or drinking at luncheons or receptions, coffee, lunch, or bathroom breaks, etc.) cannot be included toward the contact hour(s) and should be discounted from your CM credits (e.g. a 1.5 hour session with one 15 minute break = 1.25 CM credit).

However, luncheons or receptions that are instruction-based and meet the CM criteria may be counted, as well as a question and answer period following an event (e.g. 50 minutes of instruction + 10 minutes Q&A = 60 min = 1 CM credit).

## CM Eligibility

When you register, please share how you as a provider meet our criteria for the content, delivery, and [administration of events](#). We will base our reviews on the information you provide here.

When asked to describe the event or activity please consider to the following questions:

1. How will the event offer a professionally relevant learning experience for a planner (e.g. for a planner with at least 2 years of experience)?
2. How does this event meet a specific-planning related training objective?
3. What are the specific training objectives? What do you want attendees to learn from this event?

Providers seeking ethics or law credit must justify that their event:

For ethics: relates to the [AICP Code of Ethics and Professional Conduct](#)

For law: Providers must demonstrate that the content of the activity is related to planning law, such as environmental law, land use law, redevelopment law, administrative law, housing law, etc. Activities seeking law-credit CM approval must be closely related to **recently** enacted planning laws or **recent** case decisions or trends in existing planning laws or case decisions. Please note that activities related to local-level regulations, policies and ordinances (including zoning), political movements, policy recommendations, and policy initiatives are not eligible for law credit. Training on law must constitute a majority of the content of the activity.

Events must also meet standards of delivery and administration. Events qualifying for CM credit:

- Are led by one or more subject matter experts. An expert is defined by APA as a professional who has made a contribution to the profession through practice, teaching, research, or publications; completed works that proclaim individuality and mastery of the principles of planning taught; and whose work demonstrates outstanding quality and professionalism.
- Use learning methodologies and formats that are appropriate to the event's educational purpose or objectives.
- Do not include any proprietary information. Materials used during the CM credit portion of the event must be solely for educational purposes.
- Are at least 1-hour in duration.
- Are timed in a manner that is consistent with the time for which the event was registered (i.e. an event lasting 75 minutes = 1.25 CM credits, an event lasting 90 minutes = 1.5 CM credits).
- Include an announcement in which AICP members are notified that their attendance is required for the duration of the event in order to receive CM credit.
- Remain unbiased and non-promotional in nature. Note: An organization's services or products may be discussed prior to or after the completion of the CM credit portion of the event.
- Include an [attendance log and event evaluation](#).

Note: CM staff may occasionally conduct an audit within two years of a CM event. Copies of registration and evaluations will be required.

## Event Types

When registering your CM event, be sure to select the proper type of event. The event types are defined as such:

### Single Event

A single event is a self-contained, real-time event, such as a workshop, lecture, symposium, or audio conference where the lecturer and instructor are participating at the same time and at which participants cannot choose among multiple activities. All participants at a single event attend the same activities and earn the same number of credits.

### Multi-Part Event

A multi-part event is defined as an event with multiple activities, such as a conference with several sessions or multiple registration options. Participants at a multi-part event choose between a variety of activities, or a portion of the event, and individual participants may earn different numbers of credits.

Note: If you choose this type, you will be asked to enter information for each of the individual activities available at the event that you would like to offer for CM credit. The event will appear once on APA's online [calendar of events](#); the individual activities will appear on the event's detail page.

### Distance Education

A distance education event is an asynchronous learning event, where the learner and instructors are separated by time and are not engaging in the event simultaneously. The learner may access the material at their convenience.

Distance education events have additional criteria for approval. Please consider the following learning objectives before registering a distance education event:

1. What evaluation tools are used to measure the efficacy of the event and speakers? How are those tools used to help make necessary changes to the content and delivery of the event?
2. How does the event integrate methods by which the learner acts upon the information and knowledge that has been imparted (e.g. asking questions of the course instructor(s), writing an essay, taking a test or quiz, completing a project assignment, etc.)?
3. How does the product utilize multiple methods of learning. Methods of learning include:
  - text or course outline of course content
  - plans
  - photographs of case studies
  - relevant graphics, or other visuals
  - audio lectures linked to PowerPoint presentation
  - supplemental reading materials

### Demonstrating Acquisition of Content

All CM-eligible activities must contain a mechanism for gauging acquisition of content. Methods will vary with the format of each activity, but some methods that have worked in the past are:

- Multiple choice tests
- Essays
- A question and answer forum (or other interaction between audiences and presenter)
- Online discussion board
- Additional methods, as justified by the CM provider

### Copyright and Reproduction Permission

The course instructor will acknowledge the source of all materials. If the materials are owned by the instructor, this will be stated in the program. All other images, photographs, reading materials, handouts, etc. will each be acknowledged in the materials. The CM provider will keep copies of all copyright and reproduction permissions and provide them upon request to the AICP CM auditors. The CM provider will also obtain a copyright agreement from the course instructor(s) and make them available to the AICP CM auditors.

### Course Registration and Fees

Distance education products are registered in the CM system on a quarterly basis (e.g. 3-month periods) at \$50 per hour of training per quarter in which the training offers CM credit. AICP members must engage in the training product during the quarters for which CM credit has been approved.

Quarters:

- Q1 -January - March
- Q2 – April - June
- Q3 – July – September
- Q4 – October – December

For example, a two hour CD-ROM training plan that offers CM credit for an entire year must be registered for all four quarters ( $\$50/\text{hour} * 2 \text{ hours} * 4 \text{ quarters} = \$400$ ) of that year. When selecting a beginning and ending quarter that you want your product to be available for CM credit (e.g. beginning quarter of January – March and ending quarter July – September) please know that AICP members must engage in the training product during the quarters for which CM credit has been registered.

### Special note about annual unlimited payment plans:

Quarterly CM fees are included in the purchase of an annual unlimited plan; however, a separate \$50 per distance education product (not per-hour) fee will be assessed at the time of registration.

## **CM Approval Status**

Status indicators are part of the CM Provider Dashboard and are meant to assist you in managing your CM activities. Your event will be tagged with the following labels, depending on its status:

### *Not Submitted*

This event has not yet been submitted for CM review.

### *Submitted*

This event has been submitted and is currently under review by staff. Submitted events may not be edited until review is complete and event has been marked as “Approved”.

### *Approved*

This event has been approved for CM credit and is searchable by AICP members on APA’s Calendar of Events. Note: approved events may take a couple of days to be published to the calendar. Approved events may be edited or cancelled subsequent to approval.

### *Denied*

This event has been denied CM credit. Click here ([LINK TO 3.4](#)) for details on how to appeal this denial.

### *Complete*

This event is complete.

### *Incomplete*

This event is incomplete and cannot be submitted until all required fields are provided. Click on the ‘edit’ tab and follow the steps to enter complete information.

### *Needs Modifications*

This event has been reviewed but requires additional information or modification to be approved or denied.

### *Cancelled*

This event has been cancelled and has been removed from the APA Calendar of Events.

## **Making a change to your event or activity**

CM providers have the option to make minor changes to events that have been approved. Examples of minor changes would be a secondary speaker, the date, the time (so long as the same number of hours is maintained), and the location. Within the course, examples illustrating particular trends, policies, or concepts may be changed to better suit the region or city in which the event is held.

Major changes, including the number of CM credit hours, law or ethics credit, or the addition or subtraction of activities within a multi-part event must be reviewed by APA before approval. Review may take up to three weeks.

*Note: Please re-register repeat events (similar events held on more than one occasion) as separate events in the CM system.*

## **Appeal Process**

Providers may appeal the decision of APA denying credit for any submitted event using a two-level appeal process. In the first level of appeal, a provider is afforded one opportunity to submit additional materials about the event, supporting its appeal request. APA staff, in consultation with the Executive Director and CEO, may reverse the initial denial if the determination can be made that the additional supporting materials submitted by the provider: (1) clearly demonstrate how the event meets CM criteria, and (2) clearly and accurately refute the initial denial.

Any second-level appeal of APA staff and the Executive Director’s decision will be based entirely on the record submitted and will be based on a decision of a three-person panel of AICP members: one member shall be appointed by the Executive Director; one member shall be appointed by the provider; and one member shall be selected by the other two. The meeting will be held via teleconference with only the three panel members participating, and their decision shall be based on application of CM criteria and the written materials submitted to the Executive Director as part of the first level appeal. The panel’s decision is final.

Please e-mail your appeal request to: [CMAppeals@planning.org](mailto:CMAppeals@planning.org)

# ADMINISTERING A CERTIFICATION MAINTENANCE EVENT

Planning ahead maximizes the success of and minimizes the time and resources spent administrating your CM event. To help plan, consider the following at each step in the process:

## Before the event

- *Use the CM template for gathering information.* Filling out the [template](#) saves time and ensures you gather the proper information.
- *Select a point of contact.* The “point of contact” for the provider organization is responsible for the proper administration of registered CM activities as well as recording and maintaining the attendance records of AICP members.
- *Ensure the substantive content of the event is complete.* Once an event is registered for CM credit, the substantive content of the event cannot be altered. If substantial changes in content are made, the event must be re-registered as a new event.
- *Select an evaluation mechanism.* CM providers are required to use evaluation mechanisms to assess each event or activity’s quality and relevance to its purpose or objectives. [Click here or visit the CM provider tools webpage for a sample.](#)
- *Select a mechanism for recording attendance.* Each CM event must include a mechanism of recording attendance for each AICP member, such as a registration list of attendees or a sign-in sheet. From time to time APA will audit provider records. If your event (e.g. conference) has several activities, one registration list will suffice – for example, providers are not required to have sign-in sheets at each session, but should retain a master list of all registrants.
- *Maintain verification records for two years.* Should the provider be audited, they will need to produce participant sign-in information. [Click here](#) (link to sign in sheet template) for a sample sign-in sheet.
- *Register your event.* [See page 7](#) for instructions on registering a CM event. Remember, the approval process takes up to three weeks.
- *Promote your event.* [See page 11](#) for instructions on branding and publicizing a CM event. Please remember to register early. CM Branding cannot be used in promotions unless the event has been approved.

## During the event

- *Keep a registration log.* Maintain paper or electronic copies of event registration.
- *Distribute and collect event evaluations.* Remember to obtain an evaluation from each participant.
- *Notify your attendees on how to register CM credit in their event log.* CM staff recommends you provide instructions for logging CM credits at your event, to minimize questions at a later date. [See page 13](#) for a sample of these instructions.

## Following the event

- *Maintain the registration log and evaluations for two years.* CM staff may occasionally conduct an audit of CM activities. Copies of registration and evaluations will be required.
- *Check your provider dashboard.* The [provider dashboard](#) allows you to see member ratings and comments about your events and activities.

# MARKETING, BRANDING, AND PROMOTION

On behalf of all AICP members, thank you for your participation and your commitment to advancing the planning profession. We have prepared the following resources to help you get the word out about your CM-approved event.

## **APA Calendar of Events**

We continue to ensure that all members are aware of the potential for earning credits by listing CM-approved events on our electronic [APA Advance Calendar](#). Here, you can search for your events by date, topic, location, and registered provider. The event details include the CM credit information, details related to the event, speakers, as well as a link to your event registration.

We have also created a [web page](#) dedicated to listing all of your CM activities. Click on “search by provider” to find your profile.

## **CM Graphic Tool Kit**

We have created a CM Graphic Tool Kit to assist registered providers in promoting CM-approved educational activities. All providers are encouraged to market their events as CM-approved both prior to and during the event. Please visit <http://www.planning.org/cm/activities/tools.htm> to download the CM Graphic Tool Kit (PDF).

We recommend use of the CM parent mark to indicate to AICP members that your program offers CM credits in your event brochure, website and other communications.

Please contact Alisa Moore, CM Coordinator, to request a CM logo at [amoore@planning.org](mailto:amoore@planning.org)

## **APA member e-Newsletter**

APA Interact for Certified Planners is a new edition of APA’s member newsletter written specifically for AICP members. Once a month, it offers listings of new CM providers, upcoming CM activities, tips of the month, and updates on the Certification Maintenance program. [Click here](#) or visit our website to view a recent edition.

# TIPS FOR CM PROVIDERS

## Tips on Registering CM Activities

Providers of professional development may find the following information useful in registering activities for CM credit, including interpreting and responding to eligibility requirements, writing learning objectives, and requesting law and ethics credit. Please see [page 7](#) for more information.

### Tip #1 – Understand the approval process

When you [register](#), please share how you as a provider meet our criteria for the content, delivery, and [administration of events](#). We will base our reviews on the information you provide here.

When asked to describe the event or activity please consider to the following questions:

1. How will the event offer a professionally relevant learning experience for a planner (e.g. for a planner with at least 2 years of experience)?
2. How does this event meet a specific-planning related training objective?
3. What are the specific training objectives? What do you want attendees to learn from this event?

Sample response:

*Faced with declining downtowns and neighborhood commercial centers, planners have a need to learn how to bring new life to these areas. The seminar instructs planners on how to develop economic revitalization strategies involving design, zoning strategies, marketing, and partnering. Advanced-level strategies and best practices will be presented and discussed by a panel of experts in the areas of economic development and urban design. The educational purpose is to teach planners how to initiate and implement revitalization strategy of downtowns and mixed use neighborhoods.*

Example of how not to respond:

*This event is designed to meet a specific planning-related objective. The content is designed to meet planning objectives and meets the needs of AICP members. The content is designed to meet a specific planning-related training objective.*

Remember, the more detailed information you can provide the better. Visit [CM Eligibility](#) for more information.

### Tip #2 - Plan ahead

Remember, the review process may take up to three weeks. You will be unable to use CM branding in your promotion and the event will not be visible in the CM calendar until your event is approved. Please plan ahead! See [page 10](#) for things to consider before the event.

### Tip #3 – Gather the right information

We have created a template that will assist you in gathering the correct information for your CM event. By entering this information into the provider registration system, members will be able to find and register for your event. [Click here](#) to access this template.

### Tip #4 – Register your event under the correct category

Before you register, understand the types of CM activities. See [page 8](#) for more information about Single, Multi-Part and Distance Education events.

### Tip #5 – Understand the appeal process

You can appeal a denied event, and we encourage this.

In many cases, events which are denied only need to re-describe content clearly so we can better comprehend their CM relevance. Find out more information about the appeal process on [page 9](#).

### Tip #6 – Point AICP members in the right direction

Make sure you include the website address that you want AICP members to visit, whether this is your homepage or the registration site. This will make it easier for members to find information and register for your event. This link will be displayed next to your event on the [calendar](#) and the list of registered providers.

### Tip #7 – Create a distance education product

Downloadable audio files, such as CD ROMs and podcasts, of at least one hour in length may be eligible for CM credit. [Page 7](#) contains more about the special requirements for distance education products.

### Tip #8 – Don't forget to request law or ethics credit

Be sure to request the number of law or ethics credits that attendees can earn at your event, and describe how the event meets specific law and ethics criteria. Law or ethics credit is not automatically awarded. Partial credit is acceptable – For example, if a portion of your CM event meets law criteria you may request only that time for CM law. [Page 7](#) has more information.

# TOOLS FOR CM PROVIDERS

## Tools for CM Providers

The following tools were designed to help CM Providers administer the CM program and their events effectively.

Check back for new tools as they become available.

### Program Information and Tools

[CM Provider Handbook](#)

[CM Fact Sheet](#)

[Ethics Toolkit](#)

[CM Graphics Toolkit](#)

### Event Administration Tools

[CM Data Collection Template](#)

[Sign In Sheet](#)

[Evaluation Form](#)

[CM Event Log Instructions](#) (Please see info on right)

### CM Fact Sheet

We have developed a CM fact sheet that contains program highlights. This can serve as a quick reference for you, or be printed and distributed to your members or constituents.

[Click here](#) to download the fact sheet (PDF).

## CM Event Log Instructions

Members often have questions regarding the process of logging CM credits. Some providers have found success by distributing the following instructions, either in the event program, or printed on slips of paper at a CM sign in table:

*Please visit the Certification Maintenance section of APA's website ([www.planning.org/cm](http://www.planning.org/cm)) to claim your credits; you may use the following steps:*

- 1) Login using your ID# and password.*
- 2) Select My CM log*
- 3) Select Add Credits*
- 4). Under Browse you have the option of searching by Date, Provider or Distance Learning and using the search box to type in the name of the event or activity and clicking go*
- 5). If you search Activities by Date, on the left of the calendar view, please use the "previous" and "next" options to locate the month. On the right of the calendar view, please use the "previous" and "next" options to select the year*
- 6) If searching Activities by Provider, using the letters, please select the initial of the first name of the provider. From the list, then select the name of the provider*
- 7). Select the "Past Events" tab to locate the event you have attended*
- 8). If searching Distance Learning, after selecting, you will see a list of all distance education activities. To select, click on the name of the activity*
- 9). A pop-up box will appear. Please note: if this is a multi-part event you will have the option to select from a list of activities*
- 10). Please rate, add a comment (optional), and click on the Ethics statement and answer*
- 11). Click submit and the CM credits should appear in your CM log*

*If you have problems reporting your CM credits or have general questions about our CM program, please contact [AICPCM@planning.org](mailto:AICPCM@planning.org). APA's customer service associates are available to assist you.*

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