

**AIA/CES Provider Policies**

1. Providers shall delegate a primary point of contact (POC) and a secondary (POC). Points of Contacts are responsible for editing provider profiles; updating accounts; and registering and advertising courses. POCs will have access to the provider manual, certificate template, tools and resources. The Points of Contact signs a Quality Assurance Statement annually and is responsible for processing the annual invoice for the Provider. Providers shall keep the points of contact (POCs) current.
2. Providers (Points of Contact Primary and Secondary) shall register courses online and secure approval for those courses. Courses must be submitted online at least **five** (5) business days prior to advertising a course. Providers shall update and reregister courses every (3)years. Providers shall not advertise their course as "pending approval" either in print, or by any other means. Once approved providers may advertise their course to include dates; location; types of credit; number of credits; course number; course title; learning objectives; course description; course presenter and provider number. Providers are prohibited from referring to AIA/CES programs as "accredited or certified."
3. Providers (Points of Contact, Primary and Secondary) shall record and report AIA member credits within ten (10) business days of course completion using the AIA/CES Discovery system to electronically report credits.
4. Providers shall keep active files and records of all approved courses and participant attendance for a minimum of six (6) years from the date of course registration. State licensing boards and the AIA conduct audits and may require documentation within a six (6) year period.
5. Providers shall ensure that Presenters sign the Speaker Agreement\*\* when presenting for the first time, when the content of the presentation changes or when a presentation has been re-registered. Providers shall maintain copies of each signed form and provide copies to AIA/CES if requested.

*\*\* formerly called Presenter Quality Commitment Statement*

6. Providers shall ensure that courses meet the minimum requirement of at least one (1) hour with no less than four learning objectives. If a presentation offers HSW or SD, then three of the four learning objectives must address these topical areas\*\*\*. Educational content is to be free of endorsements, bias, marketing or sales orientation. Courses must include all the required identifying information. Presentations may include the Quality Assurance slides; however if such slides are not included, providers may use an informational handout to include the QA Statement; the course description; learning objectives; the copyright statement; including instructions to complete a course evaluation. Courses must follow the same format and content that was approved by AIA/CES, amendments to course content are not permitted.

*\*\*\* see Provider's Manual for more detail*

7. Providers registered as Basic; Regional; Passport; Professional; Platform; or Architecture Firm (Internal/External) (collectively, "Provider or Providers") shall follow their respective provider category terms and conditions. The company or organization Providers register shall be the sole provider of record for that specific registration ("Provider of Record"), and no other non-provider, subsidiary, or related or other third-party entity ("Non-Provider" or "Non-Providers") shall be substituted as the Provider of Record. Providers shall not permit or allow Non-Providers to use their Provider accounts to access the CES Discovery System for any reason, including, but not limited to registering courses or credits. Non-Providers are not authorized to use the AIA/CES logo, or any other AIA trademark (unless by separate agreement), or promote themselves as Providers just by association with a registered AIA/CES, nor is any provider permitted to allow such Non-Provider use. Providers agree to report any such unauthorized Non-Provider use of Provider account or AIA/CES logos immediately in writing to AIA/CES Discovery. Providers understand and agree that violation of these provisions can result in suspension or termination of their provider status.

8. Providers shall use the AIA/CES logo on their website and in advertising their course offerings. The AIA/CES logo may not be altered in any form. The use of the AIA/CES logo is permitted effective from the date an entity is approved as an

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AIA/CES provider. The use of the AIA/CES logo is not transferable. The AIA/CES logo remains the property of AIA/CES at all times. Providers who voluntarily withdraw or fail to renew their provider status, or who violate AIA/CES policies shall cease immediately from using the AIA/CES logo. The AIA/CES logo shall not be used in any manner for courses or programs that are not AIA/CES approved. Permission to use the AIA/CES logo, or any AIA/CES indicia, may be terminated at any time by AIA/CES for any breach of AIA/CES policies, procedures or terms.

9. Providers shall make available either online or in print a course evaluation for AIA members to complete at the end of each educational activity. As with other records, course evaluations need to be maintained for a period of six (6) years.
10. Providers shall make available course certificates of completion upon request within ten business days of course completion. Course certificates must include all pertinent information to include: Provider Name; Participant Name; Program Title; Program Number; Program End Date; Program Location; Number of Learning Units; Presenter Name, Title and Email; Provider Address and Point of Contact's phone number.

PROVIDERS UNDERSTAND AND AGREE THAT VIOLATION OF THESE PROVISIONS CAN RESULT IN THE SUSPENSION OR TERMINATION OF THEIR PROVIDER STATUS.

### **Ethics**

1. Providers shall provide all services competently. Providers shall not discriminate in the delivery of continuing educational activities or the conduct of research and scholarly courses on the basis of race or ethnicity, gender, age, religion, national origin, sexual orientation or disability.
2. Providers shall not misrepresent the credentials of presenters, assistants or personnel and shall inform those that are involved in the educational activities of the name and professional credentials of persons providing services
3. Providers shall not misrepresent information regarding products and may not offer specific product demonstrations during the educational portion of the activity.
4. Providers shall not make statements advertising, announcing, or marketing professional services or product promotion during the educational activity.
5. Providers shall reference the source when using other persons' ideas, research, courses, or products in written, oral, or any media presentation or summary.
6. Providers shall adhere to prevailing professional standards when referencing other professional entities, research results and products.
7. Providers shall not demean any other provider and/or manufacturer by advertising, announcing or marketing in any manner.
8. Providers shall not engage in dishonesty, fraud, deceit or misrepresentation or any form of conduct that adversely reflects on the AIA/CES provider system or on the profession of other manufacturers or AIA/CES providers.
9. Providers shall ensure that information collected from AIA members shall be secure from unauthorized use.

### AIA/ CES Provider Checklist

- Provider delegates a Primary Point of Contact and a Secondary Point of Contact. The POCs are current. The POCs signed a QA statement. POC submits Provider's annual invoice.
- Primary or Secondary Point of Contact register courses online at least 5 days prior to offering and advertising.
- Primary or Secondary Point of Contact is responsible for collecting and submitting AIA member credits via the CES Discovery System within 10 ten days of completion of an activity.
- Provider maintains active files and records including participant attendance for a minimum of six (6) years.
- Provider's Primary or Secondary Point of Contact ensures that Presenters sign the Speaker Agreement and that the agreement is kept as part of the records.
- Providers ensure that courses meet a minimum of at least one hour with four 4 learning objectives.
- Providers observe the rules of their provider category and the conditions under which they became providers.
- Providers use the AIA/CES logo on their website and in advertising their courses.
- Providers ensure that Presenters within their organization/network distribute course evaluations either in print or online for program attendees.
- Providers ensure that Presenters provide certificates of course completion, once requested.