



# Professional Development Catalog 2024-25

A publication of the Oregon Society of CPAs



Seminars | Conferences | Webcasts | On-Demand | On-Site

# New CPE catalog, same high quality

Explore an exciting new 2024-25 OSCP Select™ course schedule with the knowledge you need to succeed.

OSCP CPE is unique – the schedule is shaped by OSCP members.

Who knows better what local CPAs need than other local CPAs?



[www.orcpa.org/cpe](http://www.orcpa.org/cpe)



Spring/summer  
conferences

**33 options**

In-person programs

**200+**

Live webcast  
program options



Self-study/  
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Ethics courses



Group + volume  
conference discounts



On-demand  
package deals

# Welcome

The 2024-25 OSCP Professional Development Curriculum was developed by the Professional Development (CPE) Strategic Committee by reviewing trends in the profession and analyzing member feedback from surveys and participant course evaluations.

The OSCP-Select™ curriculum is curated from a variety of local and national speakers and CPE producers who are highly knowledgeable and recognized for their subject matter expertise. Each course offered is designed to provide the highest quality and the most relevant and timely information to meet OSCP member needs.

You can access the entire 2024-25 course schedule, including our extensive catalog of vendor-produced webcasts and webinars as well as on-demand/self-study learning options, at [www.orcpa.org/online-catalog](http://www.orcpa.org/online-catalog).

- Online catalog note: Be sure to check each tab to view the different delivery methods.

Thank you for selecting the OSCP as your educational provider of choice! Our promise is to provide you with quality educational opportunities to meet your professional development needs.

We welcome your suggestions and feedback. OSCP staff members are ready to assist you. Please reach out at 503-641-7200 / 800-255-1470, ext. 3; email: [profdev@orcpa.org](mailto:profdev@orcpa.org).

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# OSCPA-Select™ 2024–25 CPE Calendar

Register early to secure your seat at in-person events. Can't attend in-person? Experience OSCP A livestream events from the comfort of your home or office.

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>May 2024</b>				
May 14-15	Governmental Accounting & Auditing Conference (2 days) - 15 Tech & 1 [NT] - Lebanon - #11173	Lebanon	\$439	\$539
May 14-15	Governmental Accounting & Auditing Conference (2 days) - 15 Tech & 1 [NT] - Webcast - #W80436	Online	\$439	\$539
May 16	Compilations, Reviews, and Preparations: Engagement Performance and Annual Update - Webcast - #W80462	Online	\$315	\$390
May 16	K2's Budgeting and Forecasting Tools and Techniques - Webcast - #W80463	Online	\$310	\$385
May 17	K2's Case Studies in Fraud and Technology Controls - Webcast - #W80464	Online	\$310	\$385
May 20-23	AHI Beginning In-charge Staff Training - Level III (4 days) - Webcast - #W80465	Online	\$699	\$849
May 20	S Corporation Taxation: Cutting Edge Tax Strategies - Webcast - #W80467	Online	\$310	\$385
May 21	ERISA Conference - Beaverton - #11174	Beaverton	\$310	\$385
May 21	ERISA Conference - Webcast - #W80437	Online	\$310	\$385
May 21	2024 Oregon Ethics Update (4 hours - morning) - Webcast Replay - #W80468	Online	\$185	\$235
May 22	2023 Form 1065 and K-1 (2 hours - morning) - Webcast - #W80469	Online	\$95	\$125
May 22	Accounting & Auditing Update for Small Businesses (4 hours - morning) - Webcast Replay - #W80471	Online	\$195	\$245
May 22	Common Deficiencies in SSARS Engagements (4 hours - afternoon) - Webcast Replay - #W80470	Online	\$195	\$245
May 23	Going to Tax Court in Oregon: Representing Your Client as a CPA in the Magistrate Division (1 hour - morning) - NEW! - Webcast - #W80472	Online	\$0	\$20
May 23	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - morning) - Webcast - #W80473	Online	\$195	\$245
May 24	The Most Critical Challenges in Governmental Accounting Today (4 hours - morning) - Webcast - #W80474	Online	\$195	\$245
May 28	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80650	Online	\$69	\$99
May 28	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80475	Online	\$69	\$99
May 29	Estate Tax and Related Estate Planning Issues in Oregon (4 hours - morning) - Webcast - #W80477	Online	\$169	\$219
May 29	Financial Statement Disclosures: A Guide for Small and Medium-Sized Businesses (4 hours - afternoon) - Webcast - #W80476	Online	\$195	\$245
May 29	Professional Conduct & Ethics - AICPA and Oregon Board CPA Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11188	Beaverton	\$185	\$235
May 29	Professional Conduct & Ethics - AICPA and Oregon Board CPA Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80478	Online	\$185	\$235
May 30	A Complete Guide to the Yellow Book - Beaverton - #11189	Beaverton	\$315	\$390
May 30	A Complete Guide to the Yellow Book - Webcast - #W80479	Online	\$315	\$390
May 30	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80480	Online	\$69	\$99
May 30	Farming, Ranching & Agribusiness Conference - Webcast - #W80438	Online	\$310	\$385

# OSCPA-Select™ 2024–25 CPE Calendar

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>May 2024</b>				
May 31	Guide to Deducting Travel, Meals and Entertainment Expenses (4 hours - morning) - Webcast - #W80481	Online	\$195	\$245
<b>June 2024</b>				
Jun 03	Best Practices in Not-for-Profit Accounting and Reporting (4 hours - afternoon) - Webcast - #W80482	Online	\$195	\$245
Jun 03	Oregon & Washington Ethics 2024 (4 hours - morning) - Webcast - #W80498	Online	\$185	\$235
Jun 04	Common Yellow Book & Single Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80483	Online	\$195	\$245
Jun 04	Expense vs. Capitalize: Getting It Right for Taxes - Webcast - #W80485	Online	\$315	\$390
Jun 04	This Year's Best Income Tax, Estate Tax, and Financial-Planning Ideas - Webcast - #W80484	Online	\$315	\$390
Jun 05	Introduction to Yellow Book: 8-Credit Boot Camp - Webcast Replay - #W80487	Online	\$310	\$385
Jun 05	Metrics Management: Choose and Use Key Performance Indicators - Webcast - #W80486	Online	\$310	\$385
Jun 05	Real Estate Conference - Beaverton - #11175	Beaverton	\$310	\$385
Jun 05	Real Estate Conference - Webcast - #W80439	Online	\$310	\$385
Jun 06	AHI Management and Leadership Essentials - Level IV [INT] - Webcast - #W80490	Online	\$310	\$385
Jun 06	ChatGPT for Tax: A Quick Guide to Successful Tax Research (1 hour - morning) - Webcast - #W80488	Online	\$70	\$90
Jun 06	Employee Stock Options: What Financial Professionals Should Know When Advising Their Clients (2 hours - afternoon) - Webcast - #W80489	Online	\$125	\$155
Jun 07	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Beaverton - #11190	Beaverton	\$310	\$385
Jun 07	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Webcast - #W80493	Online	\$310	\$385
Jun 07	Required Minimum Distributions: Compliance and Planning (4 hours - morning) - Webcast - #W80491	Online	\$195	\$245
Jun 07	Succession Planning for the Small Business Owner: Finding the Exit Ramp (4 hours - afternoon) - Webcast - #W80492	Online	\$195	\$245
Jun 10	2024 Mid-Year Tax Update (4 hours - morning) - Webcast - #W80496	Online	\$195	\$245
Jun 10	CFO/Controller's Roadmap to Success: Integrated Planning, Forecasting, and Budgeting - Webcast - #W80495	Online	\$315	\$390
Jun 10-11	Technology Conference with K2 Enterprises (2 days) - Webcast - #W80494	Online	\$599	\$699
Jun 11	How to Create a Governmental Annual Comprehensive Financial Report - Beaverton - #11192	Beaverton	\$310	\$385
Jun 11	How to Create a Governmental Annual Comprehensive Financial Report - Webcast - #W80517	Online	\$310	\$385
Jun 11	Navigating the Complexities of Estate Planning: Avoiding Traps and Pitfalls - Webcast - #W80497	Online	\$310	\$385
Jun 11	What's Changing in A&A for Governmental Entities (4 hours - morning) - Webcast Replay - #W80499	Online	\$195	\$245
Jun 12	Employer's Handbook: Legal, Tax, and Health Care Issues - Webcast - #W80502	Online	\$315	\$390
Jun 12	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80500	Online	\$185	\$235
Jun 12	SECURE Act 2.0: Retirement Planning Update Everything that you Need to Know (2 hours - morning) - Webcast - #W80501	Online	\$105	\$135

Questions? Contact OSCP at

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[NT] Refer to Policies & Guidelines for Non-Technical CPE Definitions and Specifications

# OSCPA-Select™ 2024–25 CPE Calendar

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>June 2024</b>				
Jun 13	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Beaverton - #11191	Beaverton	\$310	\$385
Jun 13	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80503	Online	\$310	\$385
Jun 13	Construction Contractors: Non-Revenue and Non-Lease Accounting Considerations (4 hours - morning) - Webcast - #W80504	Online	\$195	\$245
Jun 13	Pat Garverick's S Corporation (Form 1120S) - Formation to Liquidation - Webcast - #W80505	Online	\$315	\$390
Jun 14	CFO Series: Chief Reviewer - NEW! - Webcast - #W80507 *Register by 5/6/24 and save \$25!	Online	*\$315	*\$390
Jun 14	How to Provide Financial Information to Non-Accountants: Tell an Interesting and Relatable Story! - Webcast - #W80506	Online	\$315	\$390
Jun 14	Pat Garverick's Partnership & LLC (Form 1065) - Formation to Liquidation - Webcast - #W80508	Online	\$315	\$390
Jun 17	Cases in Corporate Ethics: Discuss Real Life Conflicts (4 hours - morning) - Webcast - #W80509	Online	\$185	\$235
Jun 17	Deep Dive into Common Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80510	Online	\$195	\$245
Jun 17	Key Tax Issues Facing Business and Industry (4 hours - morning) - Webcast - #W80511	Online	\$195	\$245
Jun 18	Forest Products Conference - 7 Tech & 1 [NT] - Lebanon - #11176	Lebanon	\$310	\$385
Jun 18	Forest Products Conference - 7 Tech & 1 [NT] - Webcast - #W80441	Online	\$310	\$385
Jun 18	IRAs, Roth IRAs, SEPs and SIMPLE Plans - Webcast - #W80513	Online	\$310	\$385
Jun 18	Project Management for Finance Professionals - Webcast - #W80512	Online	\$315	\$390
Jun 19	CFO Series: The Effective CFO - 4 Tech & 4 [NT] - NEW! - Webcast - #W80514 *Register by 5/6/24 and save \$25!	Online	*\$315	*\$390
Jun 19	K2's Business Intelligence, Featuring Microsoft's Power BI Tools - Webcast - #W80516	Online	\$310	\$385
Jun 19	Securing a Comfortable Retirement in the Age of Spending - Webcast - #W80515	Online	\$315	\$390
Jun 20	CFO Series: Employees Today and Tomorrow [NT] - NEW! - Webcast - #W80461 *Register by 5/6/24 and save \$25!	Online	*\$315	*\$390
Jun 20	Disclosure - The Key to Financial Statements (4 hours - morning) - Webcast - #W80520	Online	\$195	\$245
Jun 20	Innovative Approaches to Property Transactions: Buying, Selling, and Gifting - Webcast - #W80519	Online	\$310	\$380
Jun 20	K2's Excel PivotTables for Accountants - Webcast - #W80518	Online	\$310	\$385
Jun 21	Estate & Trust Conference - Portland - #11177	Portland	\$310	\$385
Jun 21	Estate & Trust Conference - Webcast - #W80442	Online	\$310	\$385
Jun 21	Four Most Overlooked Business Risks: Preparing for the Future - Webcast - #W80522	Online	\$310	\$385
Jun 21	K2's Excel Best Practices - Webcast - #W80523	Online	\$310	\$385
Jun 21	Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships - Webcast - #W80521	Online	\$315	\$390
Jun 24	Basis Calculations & Distributions for Pass-Thru Entity Owners Schedule K-1 Analysis - Webcast - #W80525	Online	\$315	\$390
Jun 24	K2's Accountants Guide to QuickBooks Online - NEW! - Webcast - #W80524	Online	\$310	\$385
Jun 24	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80526	Online	\$185	\$235

# OSCPA-Select™ 2024–25 CPE Calendar

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>June 2024</b>				
Jun 25	2024 AICPA Regulatory Ethics Update (2 hours - afternoon) - Webcast - #W80528	Online	\$89	\$119
Jun 25	Accounting & Auditing Conference - Beaverton - #11178	Beaverton	\$310	\$385
Jun 25	Accounting & Auditing Conference - Webcast - #W80443	Online	\$310	\$385
Jun 25	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80651	Online	\$69	\$99
Jun 25	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80530	Online	\$69	\$99
Jun 25	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - NEW! - Webcast - #W80527	Online	\$195	\$245
Jun 25	K2's Emerging Technologies for Accountants, Including Blockchain and Cryptocurrencies (4 hours - late morning) - Webcast - #W80529	Online	\$195	\$245
Jun 26	Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners - Beaverton - #11194	Beaverton	\$320	\$395
Jun 26	Haig's Preparation, Compilation and Review Standards Update: The Best SSARS Update for Practitioners - Webcast - #W80534	Online	\$320	\$395
Jun 26	IRS Tax Examinations and Hot Issues (4 hours - morning) - Webcast - #W80532	Online	\$195	\$245
Jun 26	K2's Paperless Office - Webcast - #W80531	Online	\$310	\$385
Jun 26	Oregon and State & Local Taxation - The Basics (4 hours - afternoon) - Beaverton - #11193	Beaverton	\$195	\$245
Jun 26	Oregon and State & Local Taxation - The Basics (4 hours - afternoon) - Webcast - #W80533	Online	\$195	\$245
Jun 27	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80537	Online	\$69	\$99
Jun 27	Buying and Selling a Business: Critical Tax and Structuring Issues - Webcast - #W80536	Online	\$315	\$390
Jun 27	Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update - Beaverton - #11196	Beaverton	\$320	\$395
Jun 27	Haig's Financial Reporting Frameworks used by Small- & Medium-Sized Entities Update - Webcast - #W80535	Online	\$320	\$395
Jun 27	K2's Ethics and Technology (4 hours - morning) [NT] - Webcast - #W80539	Online	\$195	\$245
Jun 27	K2's Mastering Advanced Excel Functions (4 hours - late morning) - Webcast - #W80540	Online	\$195	\$245
Jun 27	Oregon and State & Local Taxation - Intermediate (4 hours - morning) - Beaverton - #11195	Beaverton	\$195	\$245
Jun 27	Oregon and State & Local Taxation - Intermediate (4 hours - morning) - Webcast - #W80538	Online	\$195	\$245
Jun 28	Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable - Beaverton - #11197	Beaverton	\$320	\$395
Jun 28	Haig's AICPA Auditing Standards Update: How to Perform Audits in Substance Over Form and Be Profitable - Webcast - #W80543	Online	\$320	\$395
Jun 28	K2's Technology For CPAs - Don't Get Left Behind - Webcast - #W80542	Online	\$310	\$385
Jun 28	Social Security and Medicare: Planning for You and Your Clients - Webcast - #W80541	Online	\$315	\$390
<b>July 2024</b>				
Jul 15-18	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80544	Online	\$699	\$849
Jul 16	K2's Microsoft Office 365 - All the Things You Need to Know [NT] - Webcast - #W80545	Online	\$310	\$385
Jul 17	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection - Webcast - #W80546	Online	\$310	\$385
Jul 18	K2's Excel Charting and Visualizations (4 hours - morning) - Webcast - #W80547	Online	\$195	\$245

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Date	Course Title	Location	Member Fee	Nonmember Fee
<b>July 2024</b>				
Jul 18	K2's Best Word, Outlook, and PowerPoint Features (4 hours - late morning) [NT] - Webcast - #W80548	Online	\$195	\$245
Jul 23	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80652	Online	\$69	\$99
Jul 23	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80549	Online	\$69	\$99
Jul 25	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80550	Online	\$69	\$99
Jul 30	Bottles, Brews & Buds Conference 2024 - Seattle - #11179	Seattle	\$429	\$429
Jul 30	Bottles, Brews & Buds Conference 2024 - Webcast - #W80444	Online	\$349	\$349
Jul 30	K2's An Accountant's Guide To Blockchain and Cryptocurrency (4 hours - morning) - Webcast - #W80551	Online	\$195	\$245
Jul 30	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - late morning) - Webcast - #W80552	Online	\$195	\$245
Jul 31	K2's Advanced Quickbooks Tips and Techniques (4 hours - morning) - Webcast - #W80554	Online	\$195	\$245
Jul 31	K2's Case Studies in Fraud and Technology Controls (4 hours - late morning) - Webcast - #W80553	Online	\$195	\$245
<b>August 2024</b>				
Aug 20	K2's Business Continuity - Best Practices for Managing the Risks - Webcast - #W80555	Online	\$310	\$385
Aug 21	K2's Microsoft Access - Tables, Queries, and Beyond - Webcast - #W80556	Online	\$310	\$385
Aug 22	K2's QuickBooks for Accountants - Webcast - #W80557	Online	\$310	\$385
Aug 27	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80653	Online	\$69	\$99
Aug 27	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80558	Online	\$69	\$99
Aug 29	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80559	Online	\$69	\$99
<b>September 2024</b>				
Sep 16-19	AHI Semi-Senior Staff Training - Level II (4 days) - Webcast - #W80560	Online	\$699	\$849
Sep 24	K2's Next Generation Excel Reporting - Webcast - #W80561	Online	\$310	\$385
Sep 24	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80654	Online	\$69	\$99
Sep 24	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80562	Online	\$69	\$99
Sep 25	K2's Data Analytics for Accountants and Auditors (4 hours - morning) - Webcast - #W80563	Online	\$195	\$245
Sep 25	K2's Implementing Internal Controls In QuickBooks Environments (4 hours - late morning) - Webcast - #W80564	Online	\$195	\$245
Sep 26	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80567	Online	\$69	\$99
Sep 26	K2's Improving Productivity with Microsoft 365/Office 365 Cloud Applications (4 hours - morning) [NT] - Webcast - #W80566	Online	\$195	\$245
Sep 26	K2's Introduction to Excel Macros (4 hours - late morning) - Webcast - #W80565	Online	\$195	\$245
<b>October 2024</b>				
Oct 08	Forensic Accounting: Fraud Investigations - Webcast - #W80568 *(AICPA members: take a \$30 discount)	Online	*\$270	*\$320

# OSCPA-Select™ 2024–25 CPE Calendar

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>October 2024</b>				
Oct 17	Business & Industry Conference - Beaverton - #11180	Beaverton	\$310	\$385
Oct 17	Business & Industry Conference - Webcast - #W80445	Online	\$310	\$385
Oct 17	AHI Management and Leadership Essentials - Level IV [NT] - Webcast - #W80569	Online	\$310	\$385
Oct 21-24	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80570	Online	\$699	\$849
Oct 22	Year-End Tax Planning: Thinking Outside the Box (4 hours - morning) - Webcast - #W80571	Online	\$195	\$245
Oct 23	Guide and Update to Compilations, Reviews, and Preparations (4 hours - late morning) - Webcast - #W80572	Online	\$175	\$200
Oct 25	IRS/Practitioners Forum - Portland - #11181 *Early Registration Fee (Register by 10/11/24 = \$135)	Portland	*\$150	*\$150
Oct 25	IRS/Practitioners Forum - Webcast - #W80446 *Early Registration Fee (Register by 10/11/24 = \$110)	Online	*\$125	*\$125
Oct 28-31	AHI Beginning In-charge Staff Training - Level III (4 days) - Webcast - #W80573	Online	\$699	\$849
Oct 29	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80655	Online	\$69	\$99
Oct 29	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80576	Online	\$69	\$99
Oct 29	Cutting Edge Tax Strategies for Real Estate - Webcast - #W80577	Online	\$310	\$385
Oct 29	K2's Microsoft Teams (4 hours - morning) [NT] - Webcast - #W80575	Online	\$195	\$245
Oct 29	K2's Securing Your Data - Practical Tools for Protecting Information (4 hours - late morning) - Webcast - #W80578	Online	\$195	\$245
Oct 29	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80574	Online	\$185	\$235
Oct 30	K2's Small Business Accounting Shootout (4 hours - morning) - Webcast - #W80580	Online	\$195	\$245
Oct 30	K2's Technology Update (4 hours - late morning) - Webcast - #W80581	Online	\$195	\$245
Oct 30	Oregon's Pass-Through Entity Elective Tax (PTE-E) (2.5 hours - morning) - Webcast - #W80579	Online	\$69	\$99
Oct 31	Estate Planning for 2024 & Beyond: Oregon & Washington Issues- Beaverton - #11198	Beaverton	\$310	\$385
Oct 31	Estate Planning for 2024 & Beyond: Oregon & Washington Issues - Webcast - #W80584	Online	\$310	\$385
Oct 31	K2's Testing and Auditing Excel Workbooks (4 hours - morning) - Webcast - #W80582	Online	\$195	\$245
Oct 31	K2's Top PDF Features You Should Know (4 hours - late morning) [NT] - Webcast - #W80583	Online	\$195	\$245
Oct 31	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80585	Online	\$69	\$99
<b>November 2024</b>				
Nov 01	The Complete Guide to Oregon Death Taxation - Beaverton - #11199	Beaverton	\$310	\$385
Nov 01	The Complete Guide to Oregon Death Taxation - Webcast - #W80586	Online	\$310	\$385
Nov 05	The Bottom Line on the New Lease Accounting Requirements (4 hours - late morning) - Webcast - #W80587	Online	\$175	\$200
Nov 06	Financial & Retirement Planning Conference - Beaverton - #11182	Beaverton	\$310	\$385
Nov 06	Financial & Retirement Planning Conference - Webcast - #W80447	Online	\$310	\$385
Nov 06	Multistate Income Tax - Webcast - #W80588 *(AICPA members: take a \$30 discount)	Online	*\$270	*\$320
Nov 07	Professional Conduct & Ethics - AICPA and Oregon Board CPA Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80589	Online	\$185	\$235

Questions? Contact OSCP at

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Date	Course Title	Location	Member Fee	Nonmember Fee
<b>November 2024</b>				
Nov 08	Internal Control Fundamentals (2 hours - morning) - Webcast - #W80590	Online	\$95	\$110
Nov 12	Introduction to Forensic Accounting (4 hours - late morning) - Webcast - #W80591	Online	\$175	\$200
Nov 12-13	Northwest Federal Tax Conference™ (2 days) - Beaverton - #11183	Beaverton	\$535	\$635
Nov 12-13	Northwest Federal Tax Conference™ (2 days) - Webcast - #W80448	Online	\$535	\$635
Nov 18	Individual Income and Tax Compliance Annual Update (4 hours - morning) - Webcast - #W80592	Online	\$195	\$245
Nov 19	Advanced Trust Issues: A Roadmap for Success in An Increasingly Complex Area (4 hours - morning) - Webcast - #W80597	Online	\$195	\$245
Nov 19	K2's Working Remotely - The New Normal (4 hours - morning) - Webcast - #W80593	Online	\$195	\$245
Nov 19	K2's Advanced Quickbooks Tips and Techniques (4 hours - late morning) - Webcast - #W80598	Online	\$195	\$245
Nov 19	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80595	Online	\$185	\$235
Nov 19	U.S. GAAP: Review of New Guidance and Hot Topics - Webcast - #W80596 *(AICPA members: take a \$30 discount)	Online	*\$310	*\$385
Nov 20	How ESG Reports Can Help with Recruitment & Retention (1 hour - morning) [NT] - Webcast - #W80600	Online	\$50	\$60
Nov 20	K2's Excel Tips, Tricks, and Techniques for Accountants - Webcast - #W80599	Online	\$310	\$385
Nov 21	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80603	Online	\$69	\$99
Nov 21	Annual Update for Accountants and Auditors - Webcast Replay - #W80601	Online	\$310	\$385
Nov 21	K2's Advanced Excel - Webcast - #W80604	Online	\$310	\$385
Nov 21	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - late morning) - Webcast - #W80602	Online	\$195	\$245
Nov 22	Basis, At-Risk, Passive Activity Loss, §163(j), Excess Losses (§461(l)) and NOLs (4 hours - morning) - Webcast - #W80605	Online	\$195	\$245
Nov 26	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80656	Online	\$69	\$99
Nov 26	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80594	Online	\$69	\$99
<b>December 2024</b>				
Dec 04	K2's QuickBooks for Accountants - Webcast - #W80607	Online	\$310	\$385
Dec 04	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80608	Online	\$185	\$235
Dec 04	Winning Tax Season with Better Workflow & Capacity Management (2 hours - morning) - Webcast - #W80606	Online	\$95	\$110
Dec 05	2024 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Beaverton - #11184	Beaverton	\$69	\$119
Dec 05	2024 OSCP Professional Issues Update (4 hours - morning) - 3 Tech & 1 [NT] - Webcast - #W80449	Online	\$69	\$119
Dec 05	K2's Small Business Internal Controls, Security, and Fraud Prevention and Detection - Webcast - #W80609	Online	\$310	\$385
Dec 06	Applying the Uniform Guidance in Your Single Audits - Webcast - #W80610 *(AICPA members: take a \$30 discount)	Online	*\$270	*\$320

# OSCPA-Select™ 2024–25 CPE Calendar

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>December 2024</b>				
Dec 09	K2's Excel Essentials for Staff Accountants - Webcast - #W80611	Online	\$310	\$385
Dec 10	K2's Technology For CPAs - Don't Get Left Behind - Webcast - #W80612	Online	\$310	\$385
Dec 10	Oregon & Washington Ethics 2024 (4 hours - morning) - Webcast - #W80613	Online	\$185	\$235
Dec 11	Estate Tax and Related Estate Planning Issues in Oregon (4 hours - morning) - Webcast - #W80615	Online	\$169	\$219
Dec 11	K2's Excel PivotTables for Accountants - Webcast - #W80614	Online	\$310	\$385
Dec 12	K2's Excel Best Practices - Webcast - #W80617	Online	\$310	\$385
Dec 12	Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Beaverton - #11200	Beaverton	\$315	\$390
Dec 12	Pat Garverick's Federal Tax Update: Individuals (Form 1040) - Webcast - #W80616	Online	\$315	\$390
Dec 13	Cryptocurrency Taxation: Nuts, Bolts, and Tax Law Updates (2 hours - morning) - Webcast - #W80621	Online	\$95	\$110
Dec 13	K2's Better Productivity Through Artificial Intelligence and Automation Tools (4 hours - morning) [NT] - NEW! - Webcast - #W80618	Online	\$195	\$245
Dec 13	K2's Ethics and Technology (4 hours - late morning) [NT] - Webcast - #W80619	Online	\$195	\$245
Dec 13	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Beaverton - #11201	Beaverton	\$315	\$390
Dec 13	Pat Garverick's Federal Tax Update: C & S Corporations, Partnerships & LLCs (Forms 1120, 1120S & 1065) - Webcast - #W80620	Online	\$315	\$390
Dec 16	K2's Excel Charting and Visualizations (4 hours - morning) - Webcast - #W80623	Online	\$195	\$245
Dec 16	K2's Mastering Advanced Excel Functions (4 hours - late morning) - Webcast - #W80622	Online	\$195	\$245
Dec 17	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80657	Online	\$69	\$99
Dec 17	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80625	Online	\$69	\$99
Dec 17	K2's Microsoft Office 365 - All the Things You Need to Know [NT] - Webcast - #W80626	Online	\$310	\$385
Dec 17	Tax Planning for Small Businesses (4 hours - morning) - Webcast - #W80624	Online	\$195	\$245
Dec 18	Exploring the A-B-C-D of the Digital Age and their Impact on Accounting (1 hour - morning) [NT] - Webcast - #W80629	Online	\$50	\$60
Dec 18	How Automation and AI are Enhancing Management Accountants (1 hour - afternoon) [NT] - Webcast - #W80628	Online	\$50	\$60
Dec 18	K2's Next Generation Excel Reporting - Webcast - #W80627	Online	\$310	\$385
Dec 19	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80630	Online	\$69	\$99
Dec 19	Preparing Individual Tax Returns for New Staff and Paraprofessionals - Webcast - #W80631	Online	\$315	\$390
Dec 30	K2's Case Studies in Fraud and Technology Controls (4 hours - morning) - Webcast - #W80633	Online	\$195	\$245
Dec 30	K2's Artificial Intelligence for Accounting and Financial Professionals (4 hours - late morning) - Webcast - #W80632	Online	\$195	\$245
Dec 31	K2's Accountants Guide to QuickBooks Online - NEW! - Webcast - #W80634	Online	\$310	\$385
<b>January 2025</b>				
Jan 06	State & Local Tax Conference - Portland - #11185	Portland	\$310	\$385
Jan 06	State & Local Tax Conference - Webcast - #W80450	Online	\$310	\$385

Questions? Contact OSCP at

T: 503-641-7200 / 800-255-1470, ext. 3 / F: 503-626-2942

profdev@orcpa.org / www.orcpa.org

[NT] Refer to Policies & Guidelines for Non-Technical CPE Definitions and Specifications

# OSCPA-Select™ 2024–25 CPE Calendar

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>January 2025</b>				
Jan 06-09	AHI Basic Staff Training - Level I (4 days) - Webcast - #W80635	Online	\$699	\$849
Jan 07	AI and Data Analytics for Auditing - The Big Picture (2 hours - morning) - 1 Tech & 1 [NT] - Webcast - #W80658	Online	\$69	\$99
Jan 07	Advanced Management and Leadership Essentials (2 hours - late morning) [NT] - Webcast - #W80636	Online	\$69	\$99
Jan 08-09	Pat Garverick's Hands-On Tax Return Workshop: Individuals (Form 1040) (2 days) - Beaverton - #11202	Beaverton	\$535	\$635
Jan 08-09	Pat Garverick's Hands-On Tax Return Workshop: Individuals (Form 1040) (2 days) - Webcast - #W80637	Online	\$535	\$635
Jan 09	Accounting Data Analytics (2 hours - late morning) - Webcast - #W80638	Online	\$69	\$99
Jan 10	Taxation of Real Estate Partnerships - Webcast - #W80639	Online	\$315	\$390
Jan 13	Forms 1120S and 1065 Return Review Boot Camp for New and Experienced Reviewers - Webcast - #W80640	Online	\$315	\$390
Jan 14	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Beaverton - #11203	Beaverton	\$310	\$385
Jan 14	Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80641	Online	\$310	\$385
Jan 15	2024 Federal Tax Update featuring Greg White & George Koutelieris - Portland - #11186	Portland	\$320	\$395
Jan 15	2024 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80452	Online	\$320	\$395
Jan 16	2024 Federal Tax Update featuring Greg White & George Koutelieris - Eugene - #11187	Eugene	\$320	\$395
Jan 16	2024 Federal Tax Update featuring Greg White & George Koutelieris - Webcast - #W80453	Online	\$320	\$395
Jan 21	Multnomah County / City of Portland Taxation Update (2 hours - morning) - NEW! - Webcast - #W80642	Online	\$69	\$99
Jan 21	City of Portland, Multnomah County, and Metro Taxes: Practitioner Perspectives (2 hours - late morning) - NEW! - Webcast - #W80644	Online	\$69	\$99
Jan 22	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80643	Online	\$185	\$235
Jan 22	The Best Individual Income Tax Update Course by Surgent - Webcast - #W80645	Online	\$315	\$390
Jan 23	The Best S Corporation, Limited Liability, and Partnership Update Course by Surgent - Webcast - #W80646	Online	\$315	\$390
Jan 23	Pat Garverick's Hands-On Tax Return Workshop: S Corporations (Form 1120S) - Webcast - #W80647	Online	\$315	\$390
Jan 24	Oregon Department of Revenue Update (2 hours - afternoon) - Webcast - #W80648	Online	\$69	\$99
Jan 27	Winter Governmental Auditing & Accounting Conference - Webcast - #W80451	Online	\$310	\$385
Jan 30	Pat Garverick's Hands-On Tax Return Workshop: Partnership & LLCs (Form 1065) - Webcast - #W80649	Online	\$315	\$390

**To register:** Visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe), and enter the event number.

**Looking for more learning options?** Explore the entire 2024-25 OSCP A Professional Development course schedule, including our extensive catalog of vendor-produced webcasts and webinars, as well as self-study/on-demand courses, at [www.orcpa.org/cpe](http://www.orcpa.org/cpe).

# OSCPA-Select™ Municipal Calendar

A variety of municipal programs have been scheduled by the OSCP A for the 2024-25 year. They provide a diverse listing in consideration of the Oregon Board of Accountancy's Municipal Roster Requirements. For the Oregon Board of Accountancy's Municipal Roster Requirements, refer to <https://tinyurl.com/BOAMunicipal>.

## SCHEDULED PROGRAMS FOR ADMISSION TO MUNICIPAL ROSTER

Seminars identified with Level 1 (Basic) and Level 2 (Intermediate) may be used to qualify for admission to the Oregon Board of Accountancy's Municipal Roster. Subject areas that qualify for admission are provided in the Oregon Board of Accountancy's Rules for Qualifications for Admission to the Roster in OAR 801-020-0690 (refer to <https://tinyurl.com/BOAMunicipal> or see page 26).

## ADMITTANCE & CONTINUANCE

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>Level 1 (Basic) Programs – for Admittance and Continuance</b>				
May 24	The Most Critical Challenges in Governmental Accounting Today (4 hours - morning) - Webcast - #W80474	Online	\$195	\$245
May 30	A Complete Guide to the Yellow Book - Beaverton - #11189	Beaverton	\$315	\$390
May 30	A Complete Guide to the Yellow Book - Webcast - #W80479	Online	\$315	\$390
Jun 05	Introduction to Yellow Book: 8-Credit Boot Camp - Webcast Replay - #W80487	Online	\$310	\$385
Jun 13	**Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Beaverton - #11191	Beaverton	\$310	\$385
Jun 13	**Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80503	Online	\$310	\$385
Jan 14	**Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Beaverton - #11203	Beaverton	\$310	\$385
Jan 14	**Minimum Standards for Audits of Oregon Municipal Corporations / Oregon Local Budget Law - Webcast - #W80641	Online	\$310	\$385
<b>Level 2 (Intermediate) Programs – for Admittance and Continuance</b>				
Jun 04	Common Yellow Book & Single Audit Deficiencies (4 hours - morning) - Webcast Replay - #W80483	Online	\$195	\$245
Jun 07	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Beaverton - #11190	Beaverton	\$310	\$385
Jun 07	Audits of State and Local Governments / Governmental Accounting and Financial Reporting Standards - Webcast - #W80493	Online	\$310	\$385
Jun 11	How to Create a Governmental Annual Comprehensive Financial Report - Beaverton - #11192	Beaverton	\$310	\$385
Jun 11	How to Create a Governmental Annual Comprehensive Financial Report - Webcast - #W80517	Online	\$310	\$385
Dec 06	Applying the Uniform Guidance in Your Single Audits - Webcast - #W80610 *(AICPA members: take a \$30 discount)	Online	*\$270	*\$320
<b>Level 4 (Update) Programs - for Continuance only</b>				
May 14 15	Governmental Accounting & Auditing Conference (2 days) - 15 Tech & 1 [NT] - Lebanon - #11173	Lebanon	\$439	\$539
May 14 15	Governmental Accounting & Auditing Conference (2 days) - 15 Tech & 1 [NT] - Webcast - #W80436	Online	\$439	\$539
Jun 11	What's Changing in A&A for Governmental Entities (4 hours - morning) - Webcast Replay - #W80499	Online	\$195	\$245
Jan 27	Winter Governmental Auditing & Accounting Conference - Webcast - #W80451	Online	\$310	\$385

\*\*Note: Required for admission to Municipal Roster per Oregon Board of Accountancy's OAR 801-020-0690

# OSCPA-Select™ Not-for-Profit Calendar

A variety of not-for-profit programs have been scheduled by the OSCP A for the 2024-25 year.

## ADMITTANCE & CONTINUANCE

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>Level 2 (Intermediate) Programs</b>				
Jun 03	Best Practices in Not-for-Profit Accounting and Reporting (4 hours - afternoon) - Webcast - #W80482	Online	\$195	\$245
<b>Level 4 (Update) Programs</b>				
May 23	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - morning) - Webcast - #W80473	Online	\$195	\$245
Nov 21	The Most Critical Challenges in Not-for-Profit Accounting Today (4 hours - late morning) - Webcast - #W80602	Online	\$195	\$245

For full descriptions, visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event number.

### Looking for more learning options?

Explore the entire 2024-25 OSCP A Professional Development course schedule, including our extensive catalog of vendor-produced webcasts and webinars, as well as on-demand/self-study courses at [www.orcpa.org/cpe](http://www.orcpa.org/cpe).

## Helpful Yellow Book Resources!

**Do you audit in the Yellow Book arena or are you interested in doing so?**

**Refer to these helpful resources to become familiar with the requirements.**

- **US Government Accountability Office (GAO)** — [www.gao.gov](http://www.gao.gov)
- **Government Auditing Standards (The Yellow Book)** — [www.gao.gov/yellowbook/overview](http://www.gao.gov/yellowbook/overview)
- **Government Auditing Standards: Guidance on GAGAS Requirements for Continuing Professional Education** — [www.gao.gov/products/GAO-05-568G](http://www.gao.gov/products/GAO-05-568G)
- **GAGAS Technical Assistance**  
202-512-9535; **Email:** [yellowbook@gao.gov](mailto:yellowbook@gao.gov)

Remember! Auditors conducting Yellow Book engagements should generally not count taxation courses toward their CPE requirements. There are a few exceptions to the rule. Practitioners should closely read the GAO statement. The GAO provides information in the document *Guidance on GAGAS Requirements for Continuing Professional Education*, which is a great resource for reviewing CPE compliance requirements.

# Professional Conduct & Ethics Courses



According to Oregon Board of Accountancy's OAR 801-40-010: Each biennial renewal period, all Active and Inactive licensees must take four hours of ethics CPE. For the most current Oregon Administrative Rules (OARs), refer to the BOA website: <https://tinyurl.com/OR-BOA-Rules>.

A variety of OSCP Select™ ethics programs have been scheduled for 2024-25.

Date	Course Title	Location	Member Fee	Nonmember Fee
<b>May 2024</b>				
May 21	2024 Oregon Ethics Update (4 hours - morning) - Webcast Replay - #W80468	Online	\$185	\$235
May 29	Professional Conduct & Ethics - AICPA and Oregon Board CPA Regulatory Update by Jim Rigos (4 hours - morning) - Beaverton - #11188	Beaverton	\$185	\$235
May 29	Professional Conduct & Ethics - AICPA and Oregon Board CPA Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80478	Online	\$185	\$235
<b>June 2024</b>				
Jun 03	Oregon & Washington Ethics 2024 (4 hours - morning) - Webcast - #W80498	Online	\$185	\$235
Jun 12	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80500	Online	\$185	\$235
Jun 17	Cases in Corporate Ethics: Discuss Real Life Conflicts (4 hours - morning) - Webcast - #W80509	Online	\$185	\$235
Jun 24	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80526	Online	\$185	\$235
<b>October 2024</b>				
Oct 29	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80574	Online	\$185	\$235
<b>November 2024</b>				
Nov 07	Professional Conduct & Ethics - AICPA and Oregon Board CPA Regulatory Update by Jim Rigos (4 hours - morning) - Webcast - #W80589	Online	\$185	\$235
Nov 19	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80595	Online	\$185	\$235
<b>December 2024</b>				
Dec 04	Oregon Ethics and New Developments (4 hours - morning) - Webcast - #W80608	Online	\$185	\$235
Dec 10	Oregon & Washington Ethics 2024 (4 hours - morning) - Webcast - #W80613	Online	\$185	\$235
<b>January 2025</b>				
Jan 22	Oregon Ethics and New Developments (4 hours - morning) - Webcast Replay - #W80643	Online	\$185	\$235

For full descriptions, visit [www.orcpa.org/cpe](http://www.orcpa.org/cpe) and enter the event number.

Questions? Contact OSCP at

T: 503-641-7200 / 800-255-1470, ext. 3 / F: 503-626-2942

[profdev@orcpa.org](mailto:profdev@orcpa.org) / [www.orcpa.org](http://www.orcpa.org)

[NT] Refer to Policies & Guidelines for Non-Technical CPE Definitions and Specifications

# Bring Spring / Summer Conferences to Your Team

## Two livestream webcast viewing options available:

### 1. Volume Discount: Individual Viewing Access

- Select this viewing option to register multiple individuals from your firm/business to view webcast individually from their own PC/laptop.
- Webcast confirmation emails, with unique webcast link, sent direct to each participant.
- Participants may ask questions of the speakers during the program.

**To order Individual Option:** Complete the Volume Discount: Individual Viewing Access Form at: [www.orcpa.org/vol-discount-access](http://www.orcpa.org/vol-discount-access) (one per conference).

**Deadline to order is two business days prior to event start date.**

### 2. Group Discount: Group Viewing Access

Conference viewed livestream as one group, as if you are physically at the conference.

- Participants view as a group in a firm/business conference/training room.
- Firm/business designates an employee to serve as Course Administrator to assure CPE credit for each participant.
- One group webcast link will be provided to Course Administrator.
- Participants may ask questions of the speakers during the program.

**To order Group Option:** Complete the Group Discount: Group Viewing Access Form at: [www.orcpa.org/vol-discount-access](http://www.orcpa.org/vol-discount-access) (one per conference).

**Deadline to order is two business days prior to event start date.**

## Discount Fee Structure

For both livestream webcast viewing options: The first five participants are billed at the Tier 1 per person fee. Additional participants (6+) are billed at the Tier 2 per person fee.

Group CPE Livestream Webcast	Date	Tier 1 Fee: (2-5 Participants) per person	Tier 2 Fee: (6+ Participants) per person
Governmental Accounting & Auditing Conference (2 days) (16 hrs - 15 Tech & 1 [NT])	5/14-5/15/24	\$439	\$396
ERISA Conference (8 hrs)	5/21/24	\$310	\$279
Farming, Ranching & Agribusiness Conference (8 hrs)	5/30/24	\$310	\$279
Real Estate Conference (8 hrs)	6/05/24	\$310	\$279
Technology Conference with K2 Enterprises (2 days) (16 hrs)	6/10-6/11/24	\$599	\$540
Forest Products Conference (8 hrs - 7 Tech & 1 [NT])	6/18/24	\$310	\$279
Estate & Trust Conference (8 hrs)	6/21/24	\$310	\$279
Accounting & Auditing Conference (8 hrs)	6/25/24	\$310	\$279

# Bring Spring/Summer Conferences to Your Team

## Two On-demand Training Packages:

### 1. Group CPE Training Package

Conference viewed through a link to the recorded program.

- To provide CPE credit, the Oregon Board of Accountancy requires you follow specific rules pertaining to CPE as the sponsor for your locally offered program.
- Firm/business supplies a qualified discussion leader to assure CPE credit for each participant. Minimum of two participants required plus your discussion leader.
- Fee includes on-site CPE Credit Compliance packet, discussion leader materials, and materials for two participants. For groups with more than two participants, additional materials are required for each participant.

On-demand Group CPE Training	Available Date	Group Fee 2 Participants	Materials Fee Per Person 3+ Participants
Not-for-Profit Conference (8 hrs)	5/06/24	\$355	\$99
Construction Industry Conference (8 hrs)	5/24/24	\$355	\$99
Governmental Accounting & Auditing Conference (2 days) (16 hrs - 15 Tech & 1 [NT])	5/29/24	\$499	\$109
ERISA Conference (8 hrs)	6/04/24	\$355	\$99
Farming, Ranching & Agribusiness Conference (8 hrs)	6/13/24	\$355	\$99
Real Estate Conference (8 hrs)	6/19/24	\$355	\$99
Forest Products Conference (8 hrs - 7 Tech & 1 [NT])	6/25/24	\$355	\$99
Estate & Trust Conference (8 hrs)	6/26/24	\$355	\$99
Accounting & Auditing Conference (8 hrs)	6/28/24	\$355	\$99

**To order** Visit [www.orcpa.org/cpe-oscpa-events/on-demand](http://www.orcpa.org/cpe-oscpa-events/on-demand)

### 2. Informational Package (No CPE)

- Not designed for CPE credit.
- Includes a link to the recorded program and one set of participant materials.

Informational Package (No CPE)	Available Date	Fee Per Person
Not-for-Profit Conference	5/06/24	\$199
Construction Industry Conference	5/24/24	\$199
Governmental Accounting & Auditing Conference (2 days)	5/29/24	\$219
ERISA Conference	6/04/24	\$199
Farming, Ranching & Agribusiness Conference	6/13/24	\$199
Real Estate Conference	6/19/24	\$199
Forest Products Conference	6/25/24	\$199
Estate & Trust Conference	6/26/24	\$199
Accounting & Auditing Conference	6/28/24	\$199

**To order** Visit [www.orcpa.org/cpe-oscpa-events/on-demand](http://www.orcpa.org/cpe-oscpa-events/on-demand)



# Things You Should Know



## Materials:

- At time of registration for in-person OSCP Select™ seminars and conferences, participants may request electronic or hardcopy (print) materials.
- Deadline to order hardcopy (print) materials is 14 days prior to the event to ensure availability.
- Print materials are distributed onsite at the program unless otherwise indicated.
- Electronic materials will be distributed no more than two business days prior to an event.



## Cancellation Policy has been Reinstated:

- Cancellations received eight (8) or more days prior to the event will incur no penalty.
- Cancellations received seven (7) or fewer days prior to the event will be charged a \$25.00 cancellation fee or, without penalty you may: 1) send a substitute; 2) transfer your registration to another event of your choice.
- Registration fees can be transferred any time prior to the event date and will incur no penalty.
- Requests for same day transfers for the same event (in-person / webcast) will not incur a penalty.
- Requests for same day transfers to a different event will incur a \$25 cancellation fee.
- Requests for refund or transfer following the event date cannot be honored.
- Refunds will be returned to company/individual issuing original payments.



## Member Fee Eligibility for CPE Courses:

The OSCP Member rate for CPE courses is extended to all OSCP members and their employees who are **not** eligible for OSCP membership. Members of other state CPA societies are also eligible for member rates.

After adding the course(s) to your cart, click “Apply Discounts” and select either “This person is an uncertified staff of an OSCP member” or “This person is a member of another state CPA society.”

For more information on membership eligibility, please visit [www.orcpa.org/join](http://www.orcpa.org/join).



For a complete listing of our Event Policies & Guidelines, please visit [www.orcpa.org/event-policies](http://www.orcpa.org/event-policies)

## Questions?

Contact OSCP at 503-641-7200 / 800-255-1470, ext. 3; [profdev@orcpa.org](mailto:profdev@orcpa.org).

# Event Policies & Guidelines

## HEALTH & SAFETY PROTOCOLS FOR IN-PERSON ATTENDANCE

All in-person participants agree to comply with current health and safety guidelines related to public health emergencies.

## REGISTRATION FEE DEFINITIONS

**Member Fee:** Extended to all OSCPAs members, their employees not eligible for OSCPAs membership and members of other State CPA Societies. For membership eligibility information, see [www.orcpa.org/join](http://www.orcpa.org/join).

**Nonmember Fee:** Nonmembers (if not eligible under OSCPAs member fee definition) pay member fee, plus \$50 per four CPE credit hours or plus \$75 per eight CPE credit hours. For seminars less than four hours or more than eight hours, refer to course descriptions in OSCPAs Online Professional Development Catalog.

**AICPA Members:** AICPA members are eligible for a \$30 discount for eight CPE credit hours on select AICPA seminars. Non-OSCPAs AICPA members deduct discount from nonmember fee. Discount must be requested upon registration. We regret AICPA member discount cannot be granted on or following seminar date.

**Academic Cooperation:** In recognition of the importance of providing the most current technical information available to those entering the profession, it is the policy of the OSCPAs to provide registrations to OSCPAs members that are full-time accounting educators at a reduced rate of 50% of member fee.

**NOTE:** AICPA discount applies. We regret other discounts do not apply.

## INFORMATION REGARDING LIMITATION OF "NON-TECHNICAL" CPE FOR LICENSEE RENEWAL

The Oregon Board of Accountancy's OAR 801-40-040 limits the CPE that licensees can claim in non-technical areas to 16 hours per renewal period. Non-technical CPE may be identified as interpersonal management skills, communication, public relations, practice development, and business management & organization. This list is illustrative but not conclusive of subjects considered non-technical.

*(To assist OSCPAs program participants, the OSCPAs Professional Development Strategic Committee has analyzed and indicated those programs that we deem as non-technical CPE. Those programs are indicated with the non-technical symbol [NT]. Licensees should be aware that according to the Oregon Board of Accountancy requirements, the responsibility for substantiating that a particular program is acceptable and meets the requirements rest solely with the licensee.)*

## REGISTER EARLY & WALK-IN PARTICIPANTS

You are encouraged to register at least three weeks prior to each program or event. Capacity may be limited. Registration for some programs and events may close weeks in advance. Likewise, if there is insufficient advance registration, the program or event may be cancelled. Walk-in registration on the day of the program or event will be accepted only if space allows. Walk-in participants should come prepared with their own electronic device fully charged.

## CANCELLATION POLICY

- Cancellations received eight (8) or more days prior to the event will incur no penalty.
- Cancellations received seven (7) or fewer days prior to the event will be charged a \$25.00 cancellation fee.
- Registration fees can be transferred anytime prior to the event date and will incur no penalty.
- Requests for same day transfers for the same event (in-person / webcast) will not incur a penalty.
- Requests for same day transfers to a different event will incur a \$25 cancellation fee.
- Requests for refund or transfer following the event date cannot be honored.
- Refunds will be returned to company/individual issuing original payments.

## REFUNDS/CREDITS/TRANSFERS

- Refunds, credits, and transfers are issued based on OSCPAs Professional Development Cancellation Policy. They are issued in the form of full refunds, and refunds less cancellation fee.
- Refunds will be returned to company/individual issuing original payment.

## NO-SHOW REGISTRANTS

Refunds/credits will not be issued to no-show registrants. Materials will be provided to no-show registrants.

## SUBSTITUTIONS

Substitution of another individual for an established registrant will be accepted up to the start of registration of the in-person program.

## SHARED REGISTRATIONS/SPLITTING OF MULTI-DAY PROGRAMS

We regret we are unable to split registrations for OSCPAs programs between individuals. Non-registered participants will be charged. Multi-day classes also may not be split. The full registration fee will be charged even if a participant wishes to attend only a portion of a multi-day class.

## COURTESY

OSCPAs is committed to providing a professional and welcoming environment for all participants in both in-person and virtual events. Please be courteous when posing questions to the presenters and when posting chats. Participant comments and questions should be constructive, supportive, and use appropriate language. Inappropriate posts will be removed. Overly disruptive behavior by any participant may result in removal from the event. The registration fees, if any, may be refunded at the discretion of OSCPAs.

## REFRESHMENT BREAKS/LUNCHEON

In-person programs include refreshment breaks. Please refer to your registration confirmation to determine whether a luncheon is provided, or contact the OSCPAs Professional Development Division for assistance.

# Event Policies & Guidelines

## MATERIALS

At time of registration for OSCP Select™ conferences, participants may request electronic or print materials. Print materials are distributed onsite at the program unless otherwise indicated. Electronic materials will be distributed no more than two business days prior to an event.

## LIMITATION OF DISTRIBUTION OF MATERIALS

Program materials developed for OSCP-sponsored presentations are intellectual property which belongs to the authors and therefore may **not** be distributed. Permission to download or print is granted exclusively to the paid attendee. The materials or portions thereof are not otherwise available for sale or unauthorized use.

## EVALUATIONS

Please complete the electronic evaluation form following every Professional Development program you attend. Your comments assist the OSCP Professional Development Strategic Committee in providing quality programming and speakers in a comfortable and professional environment. We appreciate your feedback.

## TECHNOLOGY USE

To ensure an optimum learning environment for all participants, cell phones must be silenced in the classroom. Laptop, tablet, and Wi-Fi use should not interfere with your learning nor that of others in the classroom.

## TRAVEL

If an event is cancelled, the OSCP is not responsible for penalties incurred by registrants who must cancel travel arrangements. If you are booking airline travel, etc., we encourage you to contact the OSCP to determine if a class will be held prior to purchasing your ticket.

## HOTEL ACCOMMODATIONS

OSCP event participants are responsible for their own overnight lodging.

## SMOKING POLICY

In compliance with the Oregon Smokefree Workplace Law, all OSCP events will be conducted in non-smoking meeting rooms. Smoking is permitted during breaks in areas of meeting facilities where indicated.

## ADVANCE PREPARATION POLICY

Advance preparation, when required, is important to maximize learning for all attending the program.

## ON-DEMAND / SELF-STUDY

OSCP offers a wide variety of on-demand and self-study courses. To explore current course offerings, visit [www.orcpa.org/on-demand](http://www.orcpa.org/on-demand).

Please be advised that all sales are final as all materials are custom assembled for your unique order. This may include, but is not limited to, electronic and paper orders for On-demand Group CPE Training Packages and Informational Packages.

## ON-SITE LEARNING

OSCP can help you bring quality education right to your doorstep. We will work with you to tailor education to your specifications and timing, to provide professional learning when you want it and when you need it. Visit [www.orcpa.org/on-site](http://www.orcpa.org/on-site), or contact us at 503-641-7200 / 800-255-1470, ext. 3 or email [profdev@orcpa.org](mailto:profdev@orcpa.org).

## MISCELLANEOUS

- The opinions expressed by Discussion Leaders/Speakers and Panelists are not necessarily those of the Oregon Society of CPAs.
- The fees listed in OSCP publications/promotional materials are subject to change without notice.
- In the case of unforeseen circumstances, topics are subject to change.
- The OSCP reserves the right to make Discussion Leader/ Speaker substitutions at any time without notice.
- The OSCP reserves the right to make facility substitutions and date changes as necessary. Although rare, if this does occur we make every effort to contact each pre-registered participant in advance.
- The OSCP reserves the right to refuse service.
- Conference and seminar titles and topics are subject to change.

## RECORDINGS AT OSCP EVENTS

By registering for and attending any OSCP event or program, you agree to the following terms and conditions: OSCP may audio and/or videotape and/or photograph participants and speakers/panelists at any OSCP event. Pictures, audio recordings, or videotape recordings of OSCP events may be used in future promotions for the Oregon Society of CPAs and/or its events, including in online and printed materials. Any pictures, audio tape recordings, or videotape recordings become the sole and exclusive property of the Oregon Society of CPAs.

## CPE CREDIT

CPE credit is issued to participants based on their full attendance at educational programs according to the credit hours determined for program structure. Due to Oregon Board of Accountancy rules, participant's individual CPE credit must be adjusted to an amount less than the total eligible credit if the attendee does not attend the entire program. In that instance, OSCP will provide the attendee with an adjusted certificate of attendance reflecting the reduction of CPE credit. The participant's signature on the Program Attendance Record is required for CPE credit to be issued.

According to the Oregon Board of Accountancy's Oregon Administrative Rules pertaining to Continuing Professional Education, eligible CPE credit is measured by program length, with one 50-minute period equal to one CPE credit. CPE credits can be awarded in one-fifth increments or in on-half increments (0.5, 1.0, x.2, x.4, x.5, x.6, x.8, etc.). Additional information regarding credit allowed and evidence of completion can be found by visiting the Oregon Board of Accountancy's website under Administrative Rules 0030-801-040-0050.

## SPECIAL NEEDS

- Special Dietary Needs: Please indicate in writing on your registration form in the area marked "Special Needs," online in your profile, or contact the OSCP at least seven days in advance.
- ADA: Please contact OSCP upon registration. Advance notification is appreciated so we may properly assist you.

**For the latest updates to OSCP's Event Policies and Guidelines, visit:**

[www.orcpa.org/event-policies](http://www.orcpa.org/event-policies).

# Oregon Board of Accountancy Resource Section

The following excerpt is a helpful resource listing current Oregon Administrative Rules (OARs), effective October 1, 2023, pertaining to Continuing Professional Education, Reinstatement Requirements, and Municipal Audit CPE related to Admittance and Continuance. Refer to the Board's website at <https://tinyurl.com/OR-BOA-Rules> for the most current information.

## Chapter 801; Division 40: Continuing Professional Education

### 801-040-0010 - Basic Requirements

**(1) Biennial CPE requirement** for Active licensees. Each biennial renewal period, certified public accountants and public accountants must report satisfactory evidence of having completed 80 hours of continuing professional education (CPE) unless such requirement is waived by the Board under ORS 673.165 and OAR 801-040-0150. The 80-hour CPE requirement must be completed as follows:

- (a) At least 20 of the required 80 CPE hours must be completed in each year of the renewal period. Hours carried forward from the previous reporting period (carry-forward hours) may not be used to meet the minimum annual requirement.
- (b) CPE hours must be completed during the two-year period immediately preceding the renewal date, except for carry-forward hours described in subsection (c) of this rule.
- (c) A maximum of 20 CPE hours may be carried forward from one reporting period to the next and may be used in partial fulfillment of the 80 hour requirement.
- (d) A minimum of four hours of ethics CPE must be included in the 80 hour CPE requirement.
- (e) CPE hours used for reinstatement may not be claimed on renewal application.

**(2) CPE Reciprocity.** Active licensees whose principal place of business is outside Oregon and who are seeking renewal of their permit shall be determined to have met the CPE requirement in OAR 801-040-0010(1) by meeting the CPE requirements for renewal of a certificate in the jurisdiction in which the licensee's principal place of business is located.

- (a) Applicants for renewal of an active permit shall demonstrate compliance with the CPE renewal requirements of the jurisdiction in which the licensee's principal place of business is located by signing a statement to that effect on the renewal application of this state unless the provision of OAR 801-040-0010(2)b) applies.
- (b) Applicants for renewal of an active permit whose principal place of business is in a jurisdiction

without CPE requirements for renewal are not eligible for the provision of OAR 801-040-0010 (2) (a) and must meet the CPE renewal requirements of this jurisdiction as set forth in OAR 801-040-0010(1).

**(3) Biennial CPE Requirements for Inactive Licensees.** A licensee who is granted inactive status must:

- (a) Obtain 32 hours of qualified continuing professional education during a two-year renewal period;
- (b) Complete four CPE hours in ethics which are included in the 32 hour requirement for each renewal period;
- (c) A maximum of 8 hours may be in non-technical subjects; and
- (d) A maximum of 8 CPE hours may be carried forward from one reporting period to the next and may be used in partial fulfillment of the 32 hour requirement.

### 801-040-0020 - Controls and Reporting

**Reporting requirement.** As a requirement for renewal of an active license, licensees are required to certify that the licensee has fulfilled the CPE requirement by signing or electronically affirming the certification section on the renewal form. Licensees are required to report the following information for each CPE program listed on the renewal form:

**(1) CPE programs.**

- (a) Name of program sponsor;
- (b) Program title;
- (c) Type of CPE program, using designations provided on renewal form;
- (d) For self-study programs, the program sponsor's Registry number;
- (e) Date(s) attended or date of completion; and
- (f) Number of hours claimed.

**(2) Published articles and books.** The CPE report must include the following information for publications to be eligible for CPE credit:

- (a) Name and address of the publisher;
- (b) Title of publication;
- (c) Description of content;
- (d) Date of first publication; and
- (e) Number of hours claimed.

### 801-040-0030 - Programs that Qualify for CPE Credit

**(1) Qualifying programs.** In order to qualify for CPE credit under these rules, a CPE program must be a formal program of learning that contributes directly to the professional competence of the licensee. It is the obligation of each licensee to select a course of study that contributes to the licensee's professional competence in public accountancy. The licensee may take programs in a variety of topics that are relevant to their practice.

**(2) Program requirements.** CPE programs must meet the following requirements to qualify for CPE credit:

- (a) An outline of the program is prepared in advance and preserved;
- (b) A record of attendance is maintained by the sponsor for a period of five (5) years and evidence of completion is provided to participating licensees; and
- (c) The program is conducted by a qualified instructor whose background, training, education or experience qualifies the person to teach or lead a discussion on the subject matter of the particular program.

**(3) Eligible programs.** The following programs will qualify for CPE credit provided they also meet the requirements of section (2) of this rule:

- (a) Programs presented by national, state or local accounting organizations;
- (b) Programs offered by a firm to licensees;
- (c) Programs sponsored by organizations that provide professional educational programs on a regular basis;
- (d) Accredited university or college courses in technical subjects as stated in OAR 801-040-0040(2) are eligible for CPE credit at the rate of 15 CPE hours for each semester hour credit and 10 CPE hours for each quarter hour credit. University or college courses that do not earn college credit are eligible for one CPE hour for each classroom hour of learning;
- (e) Distance learning programs offered by a regionally

accredited university or college are eligible for CPE credit as described in subsection (3)(d), without meeting the requirement of NASBA National CPE Registry approval described in section (4) of this rule.

- (f) Other programs may qualify for CPE credit if the program meets the requirements of section 2 of this rule.

#### **(4) Individual study programs (self-study).**

Correspondence courses or other individual study programs do not qualify for CPE credit unless the CPE sponsor is approved by the NASBA National CPE Registry. The sponsor registry number must be identified.

**(5) Blended Learning** is an educational program incorporating different learning or instructional delivery methods, an educational program incorporating multiple learning formats such as lectures, discussion, guided practice, reading, games, cases studies, and simulation.

**(6) Nano-learning Program.** Nano-learning program means a tutorial program designed to permit a participant to learn a given subject in a minimum 10 minute and less than 20 minute time frame through the use of electronic media and without interaction with a real-time instructor.

- (a) A nano-learning program differs from a self-study program in that it is typically focused on a single learning objective and is not paper-based.
- (b) A nano-learning program is not a group program.
- (c) Nano-learning is not a substitute for comprehensive programs addressing complex issues.
- (d) As evidence of satisfactory completion of the course, CPE program sponsors of nano-learning programs must require participants to successfully complete a qualified assessment with a passing grade of 100 percent before issuing CPE credit.
- (e) Assessments may contain questions of varying format.
- (f) Nano-learning credits must include a minimum of two questions.
- (g) True and False questions are not permissible on the qualified assessment. If the participant fails the qualified assessment, then the participant must re-take the nano-learning program.
- (h) The number of re-takes permitted a participant is at the sponsor's discretion.

**(7) Programs not eligible for CPE credit.** The following programs do not qualify for CPE credit:

- (a) Courses taken to fulfill the requirements for

licensure as a certified public accountant or public accountant;

- (b) Ethics courses that were taken to fulfill the Ethics exam requirement for licensure; and
- (c) CPA Exam Review.

### 801-040-0040 - Acceptable Subject Matter

**(1) Examples listed not all-inclusive.** The subjects listed in this rule serve as examples only and are not all inclusive of technical and non-technical subjects that may qualify for CPE credit.

**(2) Technical subjects.** Qualified continuing education programs in the following subjects are eligible for CPE credit as technical subjects:

- (a) Accounting
- (b) Auditing and assurance
- (c) Consulting
- (d) Specialized knowledge and applications
- (e) Management Advisory Services
- (f) Taxation
- (g) Professional ethics
- (h) Regulatory ethics
- (i) Finance
- (j) Business Law
- (k) Economics
- (l) Information Technology & Accounting Applications
- (m) Statistics
- (n) Data Analytics
- (o) Other subjects may be acceptable if they maintain or improve the licensee's professional competence.

**(3) Non-technical subjects.** Qualified continuing education programs in subjects other than those listed in section (2) of this rule are non-technical subjects and are eligible for CPE credit if the program directly contributes to the licensee's professional competence.

- (a) Credit for programs in non-technical subjects is limited to 16 CPE hours per renewal period.
- (b) The following are examples of non-technical subjects:
  - (A) Interpersonal management skills;
  - (B) Public relations;

- (C) Practice development;
- (D) Practice administration.
- (E) Marketing
- (F) Personnel/HR
- (G) Personal Development
- (H) Communication
- (I) Business Management & Organization

### 801-040-0050 - Credit Allowed and Evidence of Completion

**(1) Credit hours.** Eligible CPE credit is measured by program length with one 50 minute period equal to one CPE credit. CPE credits can be awarded in one-fifth increments or in one-half increments (0.5, 1.0, x.2, x.4, x.5, x.6, x.8, etc.). Licensees may not report duplicate courses taken in the same reporting period unless there is proof that the course was substantially modified.

**(2) Evidence of completion.** Licensees are required to document all CPE programs claimed for CPE credit and to provide the appropriate proof of completion for the number of qualifying CPE credits claimed for each program. Licensees must retain proof of completion for each CPE program reported for a period of 5 years after completion of the program.

**(3) Group study programs.**

- (a) CPE credit is allowed for actual class hours attended.
- (b) Evidence of completion includes a written course outline and certificate of completion or attendance record provided by each program sponsor. The evidence of completion must include the sponsor name, course title, date of attendance or date of completion, name of participating licensee, statement that the sponsor is included on NASBA's National Registry and providing the registry number, if appropriate, and the number of CPE hours earned;

**(4) Individual study programs.**

- (a) Individual study programs are eligible for CPE credit only if the program is offered by a NASBA National Registry approved sponsor.
- (b) CPE credit will be awarded in an amount equal to the average completion time determined by the NASBA National Registry approved sponsor.
- (c) The date for which CPE credit is allowed is the completion date specified on the evidence of completion provided by the sponsor.

Questions? Contact OSCP at

T: 503-641-7200 / 800-255-1470, ext. 3 / F: 503-626-2942  
profdev@orcpa.org / www.orcpa.org

[NT] Refer to Policies & Guidelines for Non-Technical CPE Definitions and Specifications

- (d) Evidence of completion must include the name of the participating licensee, sponsor name, program title, date of completion, instructor name, if applicable, statement that the sponsor is included on NASBA's National Registry and provide registry number, if appropriate, and number of CPE hours allowed.

#### **(5) Nano-learning.**

- (a) Evidence of satisfactory completion of a nano-learning course requires the participant to successfully complete a qualified assessment with a passing grade of 100 percent.
- (b) A nano-learning program differs from a self-study program in that it is typically focused on a single learning objective and is not paper based.
- (c) Nano-learning credits are provided in .2 CPE hour increments.

#### **(6) Lecturer, discussion leader or speaker.**

- (a) CPE credit for a lecture, training session or speaking engagement at which the licensee was an instructor, discussion leader, or speaker is allowed provided that the lecture, training, or engagement meets CPE requirements for the participants;
- (b) CPE credit for a university or college course where the licensee was the faculty instructor is allowed, provided that the course is considered an upper division (300 or 400 level) or post-graduate course.
- (c) One CPE hour is allowed for each 50 minute period completed as an instructor or discussion leader for the first presentation of the subject material if such activity increases the instructor's professional competence. CPE credit may be allowed for additional presentations if the substantive content of the program was substantially changed and the licensee provides evidence that such change required significant additional study or research.
- (d) CPE credit for preparation time allowed for an instructor, discussion leader, or a speaker shall be calculated on the basis of two CPE hours of preparation for each hour of teaching.
- (e) The maximum CPE credit allowed for preparation and teaching under this section and for published articles described in section (6) of this rule, combined, must not exceed one-half of the total number of CPE hours required for the renewal period.
- (f) Evidence of completion includes a copy of the agenda or outline provided for each presentation, lecture or speaking engagement, stating the date of presentation and name of the sponsoring organization. For university courses taught,

evidence of completion should include the course syllabus and outline for each class.

#### **(7) Published articles.**

- (a) CPE credit may be allowed for authoring published articles or books, provided the work directly contributes to the professional competence of the licensee.
- (b) CPE credit for authoring published articles or books is allowed as of the date of publication and is only allowed for the first publication of such writing. The number of CPE hours is based on the time spent creating the published article.
- (c) Authorship of a published article does not contribute to the professional competence of the licensee unless the published article is suitable for a professional audience. Published articles may be reviewed on a case-by-case basis to determine whether such articles contribute to the licensee's professional competence.
- (d) The maximum credit for published articles and books allowed under this section and for preparation and teaching under section (5) of this rule, combined, is no more than one-half of the total CPE requirement for the renewal period.
- (e) A licensee may request additional CPE credit for authoring a published article by submitting an explanation of the circumstances which justify greater credit than is otherwise allowed. The Board shall determine whether additional credit is justified.
- (f) Evidence of completion includes a copy of the title page or other pages that show the title, date of publication, and a description of the content for each article reported for CPE credit.

#### **(8) Reviewing peer review reports for Board approved Peer Review Programs.**

- (a) Licensees who serve as volunteer members of the Review Acceptance Body or any other committee that reviews peer review reports on behalf of a board approved peer review program are allowed two hours of CPE credit per meeting attended, for a maximum of 16 hours for the renewal period.
- (b) Evidence of completion includes proof of attendance, provided by the sponsor of the approved Peer Review Program, for each meeting attended.

#### **(9) University and college courses.**

- (a) CPE credit allowed is described in OAR 801-040-0030.

- (b) An official copy of the college transcript from a regionally accredited college/university is evidence of completion for courses that earn college credit.
- (c) An attendance schedule or sign-in sheet demonstrating the licensee's attendance, prepared and maintained by the college, will provide evidence of completion for courses that do not earn college credit.

### 801-040-0070 - CPE Audit

**(1)** The Board may audit CPE reports submitted by licensees. When a licensee is selected for audit of CPE hours, licensees are required to submit, using the NASBA CPE audit service, the following:

- (a) All appropriate documentation that confirms attendance of all CPE programs and the number of eligible CPE hours; and
- (b) Any additional information required.

**(2)** Licensees must comply with all requests for information and any applicable deadlines for submitting information as required.

### 801-040-0095 - Reinstatement Requirements: Inactive to Active Status

The provisions of this rule are removed from this section and included in OAR 801-010-0130 to minimize duplication.

### 801-040-0100 - New Licenses/Reinstated Licenses

#### (1) CPE Requirement

- (a) Licensees who receive an initial license to practice public accountancy shall comply with the CPE requirements from the date of issuance of the license on a prorated basis calculated at 3 CPE hours per month, including the month of issuance, until the end of the renewal period in which the license is issued.
- (b) The 20 hour annual CPE requirement shall also be prorated at two (2) CPE hours per month, including the month of issuance, until the end of the renewal period in which the license is issued.
- (c) CPE hours earned during any month of the two-year renewal cycle during which the initial license was issued shall be eligible to meet the initial CPE requirement.
- (d) The maximum credit allowed for non-technical CPE hours is no more than 20% of the prorated CPE hours due.

### (2) Requirement for licensed public accountants who become licensed as certified public accountants.

Licensees who hold a license to practice public accountancy as a licensed public accountant under ORS 673.100, and who receive an initial certificate and license to practice public accountancy as a certified public accountant shall, in addition to the requirement under section (1) of this rule, complete and report 3 CPE hours for each month of the renewal period during which the person held a license as a public accountant. CPE hours earned during any month of the two year renewal cycle during which the initial license was issued shall be eligible for credit to meet this requirement.

### 801-040-0150 - Waivers

**(1) CPE waivers.** The Board, in its discretion, may waive CPE requirements for:

- (a) Reasons of health, certified by a medical doctor, that prevent the licensee from complying with CPE requirements;
- (b) A licensee who is on extended active military duty, who does not practice public accountancy during the renewal period, and who provides a copy of orders to active military duty; and
- (c) Other good cause, to be determined by the Board on a case-by-case basis.

**(2) Requests for waivers.** A request for waiver of CPE requirements must be submitted in writing for each renewal period during which the conditions supporting the waiver exist.

### 801-040-0160 - Failure to Comply

#### (1) CPE Penalty

- (a) **Active Licensees.** Licensees who submit an application for renewal of an active license and who do not comply with the CPE requirements described in OAR 801-040-0010 are required to complete and report an additional 16 hours of qualifying CPE.
- (b) **Inactive licensees.** Licensees who submit an application for renewal of an inactive license and who do not comply with the CPE requirements described in OAR 801-040-0010 are required to complete and report an additional 8 hours of qualifying CPE.

**(2) Failure to comply with CPE requirements.** Licensees who do not meet the CPE requirements may not be renewed and may be subject to disciplinary action under ORS 673.170(2)(L) unless CPE requirements have been waived under OAR 801-040-0150.

## Chapter 801; Division 20: Municipal Audits

### 801-020-0620 – Bidding and Contracting for Municipal Audits

**(1) Municipal Roster.** The Oregon Board of Accountancy is authorized by ORS 297.670 to prepare and maintain the Municipal Roster of licensees who are authorized to conduct municipal audits required by ORS 297.425.

**(2) Requirement for firm registration.** Municipal audits required by ORS 297.425 may only be conducted through a Firm registered under the provisions of ORS 673.160.

**(3) Licensees authorized to bid and contract for municipal audits.** The following licensees who are admitted to the Municipal Roster may bid and contract for municipal audits in accordance with ORS 297.465:

- (a) A licensed CPA who is a sole proprietor and registered under ORS 673.160;
- (b) A licensed PA under ORS 673.100 who passed the audit section of the CPA Exam as a requirement for licensing and who is registered under ORS 673.160.

**(4) Firms authorized to bid and contract for municipal audits.** Bids, contracts and municipal audits may be issued in the name of a Firm under the following circumstances:

- (a) A licensee who is a member of a Firm, and who is on the Municipal Roster, may bid, contract or issue municipal audits in accordance with ORS 297.465 under the name of such Firm if all owners of the Firm are on the municipal roster; or
- (b) A Firm that has at least one member who is on the Municipal Roster may bid, contract or issue municipal audits in the name of the Firm only if the contract and the related audit report are both signed in the name of the Firm by the member who is on the Municipal Roster.
- (c) For purposes of this rule, “member” means a partner, shareholder, or owner of the firm. Any other licensee, including an independent contractor, office sharer or licensee working for or with a firm on a limited basis is not a member.

**(5) Except as provided in this rule,** no person may bid, contract or otherwise offer to issue or issue an audit under ORS 297.405 to 297.555.

### 801-020-0690 – Qualifications for Admission to Municipal Roster

**(1) Eligibility.** The following licensees are eligible to apply for admission to the municipal roster:

- (a) Individuals holding an active CPA permit issued

under ORS 673.150;

- (b) Individuals holding an active PA license issued under ORS 673.100 prior to January 1, 2002;
- (c) Individuals holding an active PA license issued under ORS 673.100 who were licensed after January 1, 2002 and who passed the audit section of the CPA Exam as a requirement of licensing; or
- (d) Individuals with an active CPA license issued by another jurisdiction that is recognized by the Board and who have authority to practice public accountancy in Oregon under ORS 673.153.

**(2) Application Requirements.** Qualified applicants for admission to the municipal roster must meet the following requirements:

- (a) The applicant must be a licensee in good standing with the Oregon Board or with the jurisdiction in which the applicant is licensed if a municipal-only authorization is sought through substantial equivalency;
- (b) Every application shall be on a form provided by the Board and shall be accompanied by fee prescribed by OAR 801-010-0010; and
- (c) The application, signed by the applicant, shall constitute an agreement between the applicant and the Board that the applicant will comply with the provisions of the Municipal Audit Law, ORS 297.405 through 297.555 and OAR Chapter 801 Division 020.
- (d) Applications for the municipal auditor license must be completed within 3 months from the date the application was received in the Board office.

**(3) Grounds for Denial.** In addition to the specific grounds stated in ORS 673.170(2), the Board may deny admission or reinstatement to the municipal roster if:

- (a) The applicant has not complied with the requirements of OAR 801-020-0620;
- (b) The applicant has committed any act or engaged in conduct that reflects adversely on the licensee’s fitness to practice public accountancy; or
- (c) The applicant:
  - A. Committed any act or engaged in conduct that would cause a reasonable person to have substantial doubts about the applicant’s honesty, fairness and respect for the rights of others or for any law.
  - B. Committed any act or conduct that resulted in a criminal conviction, other than a crime described in ORS 673.170(2)(h) or (i), will

not be used to deny admission to the municipal roster unless such act or conduct is rationally connected to the applicant's fitness to practice public accountancy.

**(4) Initial CPE Requirements.** The applicant shall demonstrate to the satisfaction of the Board that, within the two year period immediately preceding the date of application to the municipal roster, the applicant completed 40 CPE hours of Level 1 (basic) or Level 2 (intermediate) education in the following subjects, including at least 4 hours in each subject:

- (a) Audits of state and local governmental units;
- (b) Governmental accounting and financial reporting standards;
- (c) Generally Accepted Governmental Auditing Standards;
- (d) Audits of federal programs including OMB Uniform Guidance and other authoritative sources;
- (e) Oregon Local Budget Law; and
- (f) Minimum standards of audits and reviews of Oregon municipal corporations.

**(5) CPE Credit.** The 40 hours of education required for admission to the municipal roster may be included in the 80 hours of CPE required for renewal of the CPA/PA permit.

**(6) Approval.** When an application to the municipal roster is approved, the Board shall:

- (a) Notify the applicant in writing that the application is approved;
- (b) Enter the applicant's name on the municipal roster; and
- (c) Publish approved municipal auditors on the Board's website.

### 801-020-0700 – Qualifications for Continuance on Roster

**(1) Renewal.** The renewal of authorization to conduct municipal audits is accomplished with the licensee's biennial renewal. Licensees who wish to renew authorization to conduct municipal audits must include the following information with the biennial renewal application:

- (a) A statement that the licensee wishes to renew authority to conduct municipal audits;
- (b) Payment of the municipal auditor renewal fee described in OAR 801-010-0010; and

- (c) A report of the correct number of CPE hours required for municipal auditors.

**(2) Continuing CPE Requirement.** Licensees admitted to the municipal roster are required to complete 24 hours of CPE in subjects directly related to the governmental environment and governmental auditing during each renewal period. The required number of CPE hours for renewal may include CPE programs of any level (basic, intermediate, advanced or updates). At least 16 of the 24 CPE hours required must be in one or more of the following subjects:

- (a) Audits of state and local governmental units;
- (b) Governmental accounting and financial reporting standards and updates;
- (c) Generally Accepted Governmental Auditing Standards and updates;
- (d) Single Audit Act and related circulars and supplements published by the Government Accountability Office, Office of Management and Budget;
- (e) Oregon Local Budget Law; or
- (f) Minimum standards of audits and reviews of Oregon municipal corporations.

**(3) Limitation.** No more than 8 of the 24 required hours may be in courses relating to generally accepted auditing standards and procedures. Courses that make up the 8 hours described herein may include such topics as current developments in audit methodology, assessment of internal controls and statistical sampling.

**(4) CPE credit.** The 24 hours of CPE required for renewal of municipal audit authority may be included in the 80 hours of CPE required for renewal of the CPA/PA permit. During the first renewal period after appointment to the municipal roster, the 24 hour CPE requirement shall be prorated at one (1) CPE hour per month.

**(5) The Board will pro-rate** a license's first municipal auditor renewal fee in six-month increments, depending on the date of issuance.

### 801-020-0720 – Removal, Suspension and Reinstatement to the Municipal Roster

**(1) Removal.** Licensees may be removed from the municipal roster for the following reasons:

- (a) Failure to pay the biennial fee required by OAR 801-020-0700;
- (b) Failure to complete the required CPE described in OAR 801-020-0700; or

- (c) Failure to maintain an active CPA/PA permit in good standing as required by OAR 801-020-0690.
- (d) Licensees whose CPA/PA permits lapse as described in OAR 801-010-0130, or who fail to renew the authorization to conduct municipal audits as described in OAR 801-020-0720 shall be removed from the municipal roster.

**(2) Suspension.** Licensees may be suspended from the municipal roster for:

- (a) Failure to comply with the provisions of the Oregon Municipal Audit Law, ORS 297.405 through 297.555; or
- (b) Any of the reasons stated as grounds for denial in OAR 801-020-0690(3).

**(3) Reinstatement.** Licensees who wish to be reinstated to the municipal roster are required to hold an active CPA/PA permit in good standing.

- (a) Two years or less. A licensee seeking to be reinstated to the municipal roster within the two year period following the date such licensee was removed from the roster is required to:
  - A. Pay the appropriate fee stated in OAR 801-010-0010; and
  - B. Complete and report 24 hours of CPE as described in OAR 801-020-0700, plus a 16-hour CPE penalty.
- (b) More than two years. A licensee seeking to be reinstated to the municipal roster more than two years after the date such licensee was removed from the roster is required to:
  - A. Pay the appropriate fee stated in OAR 801-010-0010; and
  - B. Meet the requirements for initial admission to the municipal roster described in OAR 801-020-0690.

- (c) Suspension. Approval of reinstatement applications submitted by licenses who are suspended from the municipal roster, or whose CPA or PA permit has been suspended by the Board of Accountancy, is subject to the discretion of the Board. Licensees under this section are required to:

- A. Meet all conditions and terms of the suspension order;
- B. Pay the appropriate fee stated in OAR 801-010-0010;
- C. Meet the requirements for initial admission to the municipal roster described in OAR 801-020-0690; and
- D. Complete and report a 16-hour CPE penalty.

- (d) CPE requirements for reinstatement. All CPE hours required for reinstatement to the municipal roster, including CPE penalty hours, must be in subjects directly related to the governmental environment and governmental auditing and must be completed within two years preceding the date of the reinstatement application.

## For Further Information:

**Oregon Board of Accountancy**  
 3218 Pringle Road SE, Suite 110  
 Salem, OR 97302-6307  
 Phone: 503-378-4181

Web: <https://tinyurl.com/OR-BOA-Rules>

Notice: This information subject to change.  
 Refer to the Oregon Board of Accountancy for the most current information.



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3. **Mail** registration form and payment to: 10206 SW Laurel Street, Beaverton, OR 97005-3209

Member #: \_\_\_\_\_

Name: \_\_\_\_\_

Business: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**PLEASE CHECK ALL THAT APPLY:**

- OSCPAs Member
- Nonmember
- AICPA Member
- Uncertified Employee of an OSCPAs Member. Not eligible for membership.
- Member of \_\_\_\_\_ State Society
- Please send me information about OSCPAs membership

Address Update Requested

Course Date	Course Number	Course Title	Course Location	Member Fee	Nonmember Fee	AICPA Discount	Total	Office Use Only
	#			\$	\$	\$	\$	EC:
	#			\$	\$	\$	\$	EC:
	#			\$	\$	\$	\$	EC:
	#			\$	\$	\$	\$	EC:
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	#			\$	\$	\$	\$	EC:
	#			\$	\$	\$	\$	EC:
	#			\$	\$	\$	\$	EC:
							Grand Total	EC:
								Type:
								Check:
								F/P:



Special/Dietary Needs: \_\_\_\_\_

- I would like this dietary request for all OSCPAs CPE events.  
*Registration confirmations will be provided. This form may be duplicated.*





**OREGON SOCIETY  
OF CERTIFIED PUBLIC  
ACCOUNTANTS**  
10206 SW Laurel Street  
Beaverton, OR 97005-3209

ADDRESS SERVICE REQUESTED

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[NT] Refer to Policies & Guidelines for Non-Technical CPE Definitions and Specifications