

Your CPE, read off the certificates.

Drop the PDFs in. Course, sponsor, field of study, hours and completion date come back as rows you check and import — 60 certificates at a time.

Every firm has the same drawer: a year of certificates in a folder, and somebody typing them into a spreadsheet each renewal. The typing is not the expensive part. The expensive part is that nobody wants to do it, so it is done at the end, from a pile, against a deadline.

What comes back

A table, before anything is saved. Each row carries what was read, where from, and which employee it matched — by the name on the certificate, not by the order of the files.

It reads the awkward ones

- **Letter-spaced text.** Certificates that render every glyph separately arrive as E t h i c s f o r. They are put back together from the spacing — and the completion date, which is the field that gets lost, comes through.
- **Split credit.** One certificate carrying Accounting 3, Auditing (Governmental) 3.5, Taxes 1.5 becomes 3 rows of 8 hours between them, each filed under its own category, with the course title left clean.
- **71 sponsors** recognised from how they sign — the national houses, the state societies, and the bodies whose courses CPAs claim.

STATUS	DATE	HOURS	COURSE	CATEGORY	EMPLOYEE	
☒ ready	2026-06-02	4.0	Ethics for California CPAs CalCPA - Self-study Matched to Ellen Boyd by the name on the certificate.	Ethics guess	Ellen Boyd	Edit
☒ ready	2026-09-14	8.0	Governmental Auditing Standards Update Western CPE - Self-study Matched to Marcus Hartwell by the name on the certificate.	Accounting & Auditing guess	Marcus Hartwell	Edit
☐ problem	2026-03-11	4.0	Fiduciary Accounting for Trusts no sponsor - Self-study No sponsor could be read from this certificate. Type it in before importing: the sponsor is part of what the record evidences, and the program will not put a name to it on your behalf. Read from the certificate but not used. "Obecare Local Training Group". If that is the sponsor, or part of the course title, type it in before importing. Matched to Priscilla Nance by the name on the certificate.	Other guess	Priscilla Nance	Edit

The review table, before anything is written: four certificates, six rows, one held back.

AND IT SAYS WHEN IT CANNOT READ SOMETHING

"No sponsor could be read from this certificate. Type it in before importing: the sponsor is part of what the record evidences, and the program will not put a name to it on your behalf."

That row will not import until somebody types the sponsor in. It used to guess — and a guess that is usually right is the worst kind, because nobody checks it. The sponsor is part of what a CPE record is evidence of.

What it will not do

- **Invent a completion date** — the one field a CPE record cannot do without.
- **Mark anything verified** on your behalf.
- **Save anything before you look.** The read is a proposal until you press import.
- **Send your certificates anywhere.** The PDF is read in your own browser; what reaches the server is words and positions, never the file.

The Board’s own worksheet.

CONTINUING EDUCATION REPORTING WORKSHEET

CPA — California Board of Accountancy format. CE information for active license renewal.

Licensee
License expiration date
Firm

Ellen Boyd
12/31/2026
Hartwell & Boyd CPAs

CPA license number
Reporting period
Prepared

58330
1/1/2025 to 12/31/2026
10/17/2026

Course Title (avoid abbreviations)	Subject Code	Claimed as Government CE (Y/N)	Date(s) Completed (course must be completed to list)	Hours Claimed	Name of Provider	Method of Presentation
Yellow Book Update for Nonprofit Auditors	G	Y	1/22/2025	8	AICPA	Group Internet-Based
Revenue Recognition for Nonprofits	A	N	3/11/2025	6	AICPA	Group Internet-Based
Independence and the AICPA Code	E	N	4/29/2025	4	CalCPA	Live
Audit Documentation That Holds Up	A	N	6/17/2025	4	AICPA	Group Internet-Based
Federal and California Tax Update	T	N	8/5/2025	8	Spidell	Live
Internal Control for Smaller Entities	A	N	9/16/2025	4	AICPA	Group Internet-Based
Employee Benefit Plan Audits	A	N	11/12/2025	8	AICPA	Group Internet-Based
Accounting and Auditing Update	A	N	1/27/2026	8	AICPA	Group Internet-Based
SQMS No. 1 Implementation Workshop	A	N	3/4/2026	8	CalCPA	Live
Nonprofit Financial Statement Presentation	A	N	5/19/2026	6	AICPA	Group Internet-Based
California Tax Update	T	N	7/14/2026	8	Spidell	Live
Review Engagements: Analytical Procedures	A	N	9/8/2026	6	AICPA	Group Internet-Based
Data Analytics in the Audit	T	N	10/6/2026	6	AICPA	Group Internet-Based

HOURS CLAIMED BY SUBJECT

	Hours
Regulatory Review (technical)	0
Government CE (technical)	8
Audit & Assurance CE (technical)	50
Fraud CE (technical)	0
Ethics (technical)	4
Other Technical CE	22
Non-Technical CE	0
Preparation Engagement CE	
TOTAL HOURS CLAIMED	84
of which technical	84

Not tracked separately. Enter the hours here if claimed.

At least 40 of the 80 hours must be technical.

One licensee, one renewal period: 13 courses, 84 hours, in the California Board of Accountancy's columns.

Reading certificates in is only worth something if something comes out. What comes out is the **Continuing Education Reporting Worksheet** in the Board’s own format and column order — course title, subject code, whether it is claimed as government CE, dates, hours, provider, method of presentation.

Not a dashboard. When a firm has to produce this, the person asking is a Board investigator or a peer reviewer, and the right answer is a document in the form they already read.

Measured against the rule, per licensee

CALIFORNIA, AS IT SHIPS	FIGURE
Total, per two-year cycle	80 hours
Minimum each year	20, 12 technical
Ethics per cycle	4 hours
Regulatory Review	2 hrs / 6 yrs
Attest: A&A and fraud	24 and 4

Editable per firm and per state. The period runs to the last day of the licensee’s birth month, not to 31 December — so two people in one firm are measured over two different windows.

WHERE IT GOES NEXT

The same record decides who may be put on an engagement. Years of recorded education, audit and review experience, controller or CFO years, and the competencies a client’s industry asks for — a bank is not a nonprofit — all read from what the CPE file already holds. Nothing is typed twice.

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Happy to read a handful of your own certificates and show you what comes back, including the ones it cannot read.