



# **Change Request Individual Course Approval Major Course Changes**

## Change Type – Individual Course Approval

### Major Course Change

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CE providers can request to add a format or instructor to an individual course approved by ACE at any time during the course approval period by submitting a change request and fee (\$25 per format; \$15 per speaker).

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Payment of fees and change request submission does not constitute approval.

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The provider may not offer the approved course in the new format or by the new instructor until ACE grants official approval.

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Approval of new formats and instructors will be effective on the date approved and for the remainder of the individual course approval period.

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Once approved, the change request will reflect a status of approved in the portal.

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Change requests can take up to 30 days for approval.

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# Entering a New Change Request

Access the provider record in the portal and click the “Create New” dropdown.

From the dropdown list, click New Change Request.

CE PROVIDER TEST 0318

6291 Approved Provider Approval In-Person Provider Approval 2114

ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID
3	PROVIDER STAFF	1	5	1
3	FEEES AND PAYMENTS			

Provider Information

Provider Staff + Add New 3

Provider Approval - Application 1

Provider Approval - Course Sample 5

Status	Original Approval Date	Delivery Format	Course Title	Cosponsor Agreement Link	Conference Link
Not Submitted		Synchronous	Test		

WF: PRE-QUALIFICATION LOG

PQ Criteria Met Current Level

ACE Data Entry 1 3/18/24 11:13AM

WF Level: Submitted and Under Review

Outcome: Pre-Qual Met

To: PQ Criteria Met

ACE Data Entry 1 3/18/24 11:13AM

WF Level: Submitted and Under Review

SYSTEM FILES

# Change Request Entry Major Course Change

## Add Format

When the change request opens, populate the change effective date.

Select major course change as the change type.

Select the course title of the course to change from the dropdown.

Select course- add format as the change type.

Choose the format being added.

Upload the required documents by selecting choose file.

Complete the required signature fields and click save entry.

CE PROVIDER TEST 0318  
Change Request

Provider Details

request date 10/09/2024

Change Effective Date \* This is the date that the change should be effective. For instance, if you are closing the business, this would be the closure date.

Change Type \*

Provider Changes Staff Changes Provider Level Format Changes **✓ Major Course Change** Minor Course Change

Course Changes

Course To Change \*

Course Change Type - Major \*

☒ Course - Add Format <sup>1</sup>

☐ Course - Add Instructor/Speaker <sup>1</sup>

Course Add Format \*

☐ In-Person

☐ Synchronous Distance Learning

☐ Recorded Asynchronous Distance Learning

☐ Reading-Based Asynchronous Distance Learning

Pilot Test Information

Course New Promo Material \* This is required for Course - Add Format change type

Course New Evaluation \* This is required for Course - Add Format change type

Course New Certificate \* This is required for Course - Add Format change type

Billing

# Change Request Entry Major Course Change

## Add Instructor

When the change request opens, populate the change effective date.

Select major course change as the change type.

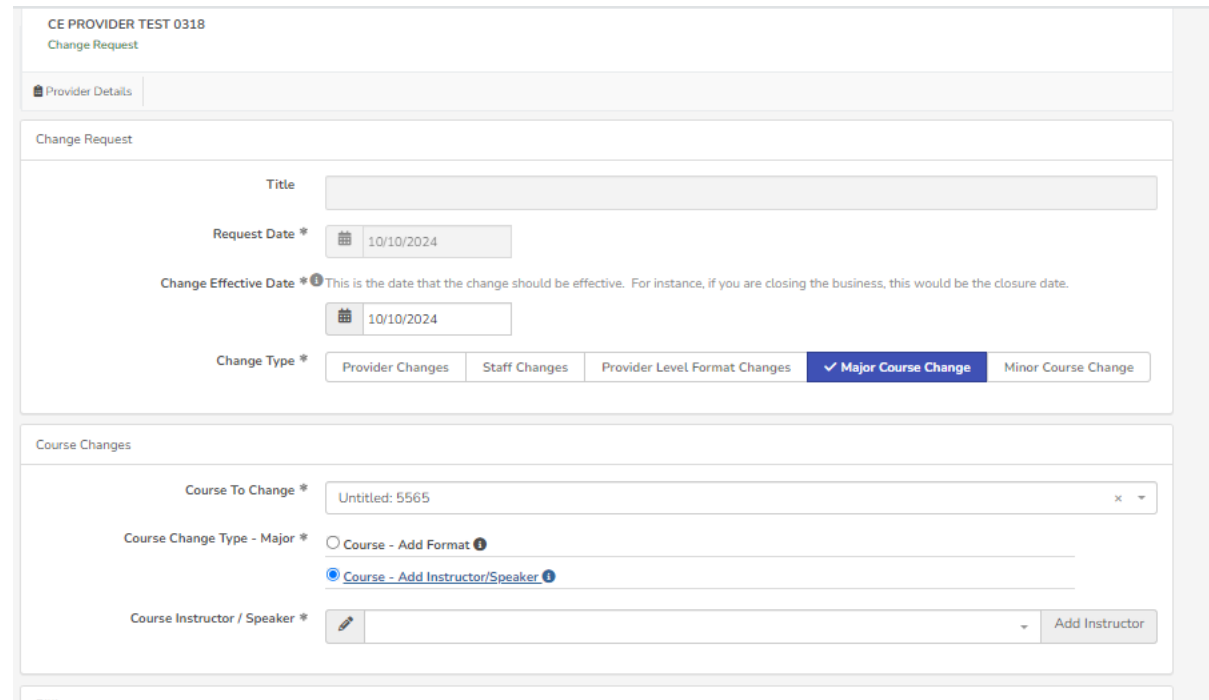
Select the course title of the course to change from the dropdown.

Select course- add instructor as the change type.

Either select an existing instructor already in the system from the course instructor dropdown or click add instructor to add a new instructor.

Complete the course instructor fields and click save entry.

Complete the required signature fields and click save entry.



The screenshot shows a web form titled "CE PROVIDER TEST 0318 Change Request". It has a tabbed interface with "Provider Details" and "Change Request". The "Change Request" tab is active. It contains fields for "Title", "Request Date" (10/10/2024), and "Change Effective Date" (10/10/2024) with a tooltip explaining it's the date the change should be effective. Below these is a "Change Type" section with radio buttons for "Provider Changes", "Staff Changes", "Provider Level Format Changes", "Major Course Change" (selected), and "Minor Course Change". The "Course Changes" section below has a "Course To Change" dropdown (Untitled: 5565), a "Course Change Type - Major" section with radio buttons for "Course - Add Format" and "Course - Add Instructor/Speaker" (selected), and a "Course Instructor / Speaker" dropdown with an "Add Instructor" button.

# Payment

Select “Pay by CC” or “Pay by Check”

CE PROVIDER TEST 0318  
Major Course Change - Course - Add Format

AD

Provider Details

Modify Entry

Pay By CC

Pay By Check

6291

1471

Approved Provider Approval

Synchronous distance learning

Provider Approval

2114

ID	Entry ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID
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Change Request

12

Title

Major Course Change - Course - Add Format

Status

Request Date

10/10/2024

Change Effective Date

10/10/2024

Change Type

Major Course Change

Provider Changes

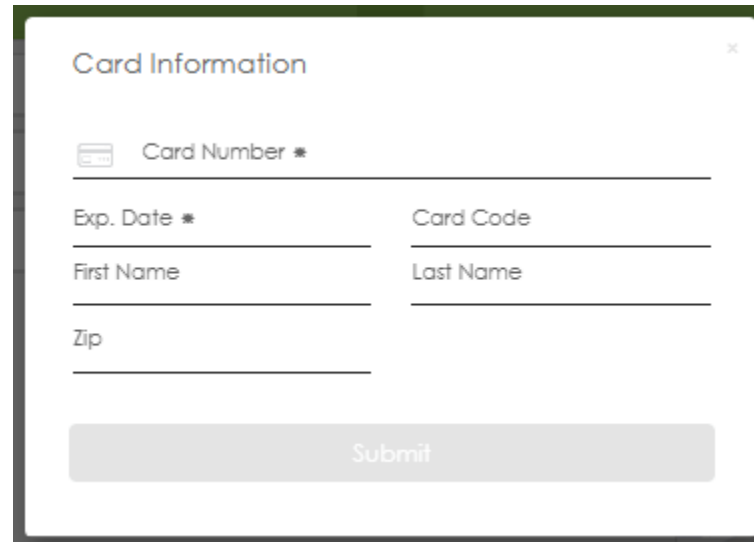
Staff Changes

Provider Format Changes

Course Changes

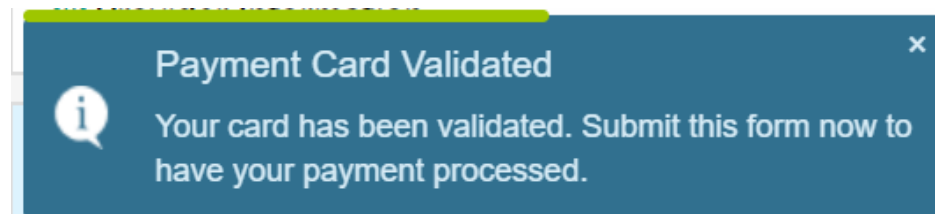
## Payment – Credit Card

If paying by credit card, enter the card information and click “submit”



A screenshot of a web form titled "Card Information" with a close button (x) in the top right corner. The form contains the following fields: "Card Number \*" with a card icon, "Exp. Date \*" (expiration date), "Card Code", "First Name", "Last Name", and "Zip". A "Submit" button is located at the bottom of the form.

The following confirmation will appear when processing of the credit card payment is complete.



# Change Request Submission

Payment Status

Successful payment of \$25.00 applied.

CE PROVIDER TEST 0318

Major Course Change - Course - Add Format

Provider Details Modify Entry Delete Entry **Submit** Download Refresh

6291	1471	Approved Provider Approval	Synchronous distance learning	Provider Approval	2114
ID	Entry ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID
Change Request 12					
Title Major Course Change - Course - Add Format					
Status					
Request Date 10/10/2024					
Change Effective Date 10/10/2024					
Change Type Major Course Change					

Select submit and then select provider details to return to the main page of the provider record.



# Submitted and Under Review

From the provider detail page, expand the change request section. The status of the change request will be “submitted and under review”.

CE PROVIDER TEST 0318

: CE Provider Test 0318

KC ID

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✎ Modify

📄 Provider Detail

Create New ...

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6291

Approved Provider Approval

Synchronous distance learning

Provider Approval

2114

PQ Criteria Met

ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID	Pre-Qualification
8	PROVIDER STAFF [10/9/24]	1 PROVIDER APPROVAL - APPLICATION [3/18/24]	4 PROVIDER APPROVAL - COURSE SAMPLE [10/1/24]	3	COURSE - INDIVIDUAL APPROVAL [10/9/24]
2	COURSE INSTRUCTOR [9/17/24]	12 CHANGE REQUESTS [10/10/24]	7 FEES AND PAYMENTS [10/10/24]		

Provider Information

Provider Staff + Add New 8

Provider Approval - Application + Add New 1

Provider Approval - Course Sample + Add New 4

Course - Individual Approval + Add New 3

Course Instructor + Add New 2

Change Request + Add New 12

	Title	Status	Change Effective Date	Change Type	Course To Change	Course Instructor / Speaker
View	Major Course Change - Course - Add Format	Submitted and Under Review	10/10/2024	Major Course Change		

SYSTEM FILES

ACE application user guide - Helpful tips

ACE application user guide - Individual course appr...

ACE application user guide - Making updates

ACE application user guide - Prequalification request

ACE application user guide - Provider application

ACE application user guide - Provider renewal

ACE-Handbook-12.2023

ASWBProviderRenewalCourseListTemplate

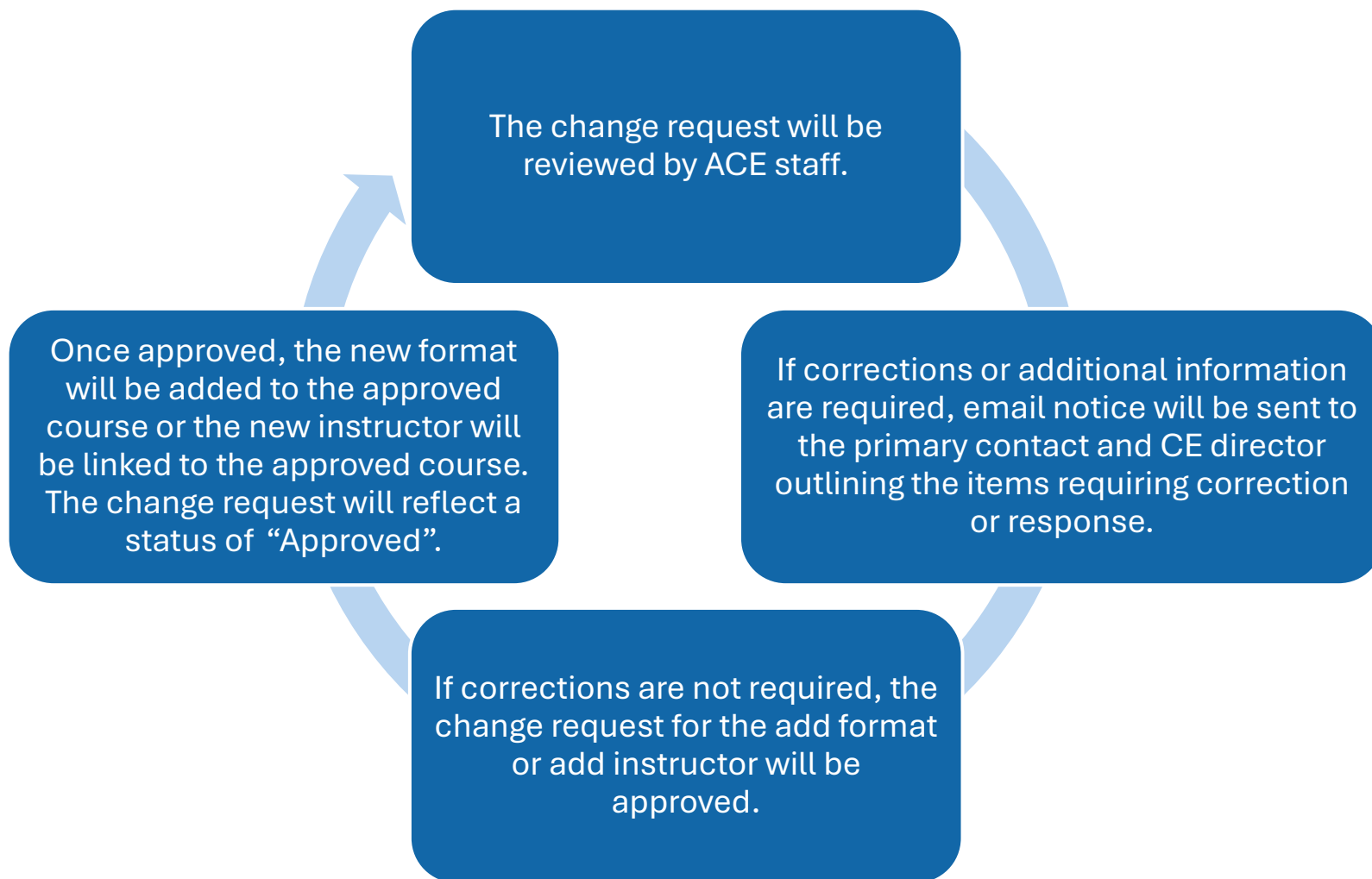
Cosponsor-Agreement-Template

Provider Staff Agreement

Renewal provider agreement

MAP

## Change Request - Review Process



# Change Request Approved

Once the change request is approved, the status will be "approved".

CE PROVIDER TEST 0318  
: CE Provider Test 0318

[1] > [Icons] Modify Provider Detail Workflow... Create New ...

6291 Approved Provider Approval Synchronous distance learning Provider Approval 2114 PQ Criteria Met

ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID	Pre-Qualification
8	PROVIDER STAFF [10/9/24]	1 PROVIDER APPROVAL - APPLICATION [10/18/24]	4 PROVIDER APPROVAL - COURSE SAMPLE [10/1/24]	3	COURSE - INDIVIDUAL APPROVAL [10/10/24]
2	COURSE INSTRUCTOR [9/17/24]	12 CHANGE REQUESTS [10/10/24]	7 FEES AND PAYMENTS [10/10/24]		

Provider Information

Provider Staff + Add New 6

Provider Approval - Application 1

Provider Approval - Course Sample + Add New 4

Course - Individual Approval + Add New 3

Course Instructor + Add New 3

Change Request + Add New 12

Title	Status	Change Effective Date	Change Type	Course To Change	Course Instructor / Speaker
Major Course Change - Course - Add Format	Approved	10/10/2024	Major Course Change	test (ASWB Course ID:5999)	

WF: PRE-QUALIFICATION LOG

PQ Criteria Met Current Level

ACE Data Entry 1 3/18/24 11:13AM  
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Outcome: Pre-Qual Met  
To: PQ Criteria Met

ACE Data Entry 1 3/18/24 11:13AM  
WF Level: Submitted and Under Review

SYSTEM FILES

- ACE application user guide - Helpful tips
- ACE application user guide - Individual course appr...
- ACE application user guide - Making updates
- ACE application user guide - Prequalification request
- ACE application user guide - Provider application
- ACE application user guide - Provider renewal