



## **IEEE Credentialing Program Policy and Procedures - Approved**

The following policies and procedures shall govern the operations of the IEEE Educational Activities Credentialing Program:

### **I. Procedures and Rules for External Approved Providers**

#### **A. Becoming an external approved provider**

External organizations looking to partner with the IEEE Educational Activities (EA) Credentialing Program must obtain pre-approval from the IEEE Credentialing Program Committee (CPC) following the Credentialing Program's [published process](#) by applying through the [IEEE Innovation at Work application](#). The application consists of organizational data with required supporting documentation such as:

- Mission Statement
- Target market and audience
- Geographic focus
- All affiliates, subdivisions, and groups from the organization that will be participating in the credentialing program
- [IEEE fields of interest](#) that apply
- Accreditation by a professional credentialing organization; if applicable
- Current or prior relationship with IEEE, if applicable
- Types of program or courses offered
- Instructional data
- Instructor/SME biographies
- Course descriptions
- Types of credits offered
- Benefits to target audience

Once the application is submitted, it is forwarded to the CPC for review. A review of the application and a response is made within 10 business days and communicated back to the applicant by the IEEE Credentialing Program Specialist.

Upon approval, the IEEE Credentialing Program Specialist provides complete instructions via a Welcome Kit for the Approved External Provider to follow in order to maintain good standing as an IEEE External Provider and to obtain approval for individual courses and/or events.

Instructions shall include:

- IEEE Credentials Program Terms & Conditions
- Use of IEEE Brand documentation
- IEEE Certificates Application Guide for OpenWater with links, instructions, next steps

- Invoicing information in order to bill External Provider

#### B. Process for obtaining approval for individual events/courses for the issuance of IEEE Certificates

In order to maintain good standing as an IEEE External Provider, the provider shall follow the IEEE Credentialing Program's established procedures and practices for individual events/courses.

##### 1. Guidelines for individual events/courses

Each application for individual event/course approval requesting IEEE Certificates and CEU/PDH credits shall be completed by External Provider following the IEEE Credentialing Program instructions and using the OpenWater application.

- Courses/events must be within IEEE's fields of interest
  - Applications must be submitted by External Provider's approved contact at least 10 business days prior to the event or course start
  - Applications must be complete and include course/event title, abstract, agenda, instructor CV/biography
  - The maximum number of CEU (Continuing Education Unit) or PDH (Professional Development Hour) credits being requested shall be included in the application. The CPC reserves the right to make the final determination on the number of credits that can be issued for a course or event
  - Courses/events may not exceed 50 hours of instruction per certificate and no more than 5.0 CEUs/50 PDHs will be issued per certificate
  - Instructor and SME resumes/curriculum vitae requirements must be met and shall be included in the application
  - Evaluation forms are required from each course/event attendee. Evaluation forms must be submitted in English.
  - Required attendee Roster template provided by IEEE shall be used and contain the names and contact information for each person who requests a Certificate (must use Accredible's format)
  - Applications from External Providers submitted into the OpenWater system shall be completed within 90 days. Not meeting the 90 day deadline or insufficient application data in Open Water may be deleted requiring that a new application be started after 90 days.
2. IEEE Credentialing Program acknowledges that occasionally External Partners may need to request IEEE certificates for past events/courses, however this practice shall be discouraged and limited to no more than 120 days after the close of the event or course.
  3. Late evaluations from event or course attendees after an event or course has been completed is highly discouraged. Late attendee evaluations may be accepted up to 90

days after a completed course or event. After 90 days, the IEEE Credentialing Program is under no obligation to issue late Certificates. IEEE will not issue certificates past 6 months.

4. Marketing guidelines concerning the use of the IEEE name and IEEE Certificates shall be followed. Failure to follow the guidelines may result in the revocation of External Provider's approval. Guidelines shall be supplied to the External Provider upon approval as part of the Welcome Kit. The Guidelines shall include information about:
  - Use of IEEE Logo
  - Link to [IEEE Branding page](#)
  - Sample language that can be used by approved provider regarding the use of IEEE Certificates.
  - Social media guidelines

## 5. Maintaining Good Standing as an External Provider

IEEE shall be entitled to immediately and without liability either suspend or terminate provision of the services in the event of:

- (a) misuse of IEEE brand and/or misrepresentation of Certificate Issuer courses or events;
- (b) failure by the Certificate Issuer to comply with any of its obligations hereunder and such failure is not remedied within 10 days that notice of such failure has been notified to Certificate Issuer or
- (c) any suspension of payment exceeding 90 days, arrangement with creditors, bankruptcy, insolvency, receivership or cessation of business by Certificate Issuer;
- (d) consistent incomplete information given in regard to event application, online platform, attendee rosters, attendee surveys, or poor evaluations reported on attendee surveys.

## 6. Re-applying as an external approved provider

External approved providers who have not submitted any applications for individual courses or events after 24 months of approval *may* require re-approval by the CPC. See above process detailed in section I.A. Further, approved External Providers may be required to submit a new application upon request and reapply after 36 months to be re-evaluated and re-approved by the CPC.

## II. Procedures and Rules for Internal IEEE Partners

### A. IEEE sponsored events and courses

- Courses/events must be within IEEE's fields of interest

- Courses/events must be educational and include an evaluation and/or assessment in order to receive IEEE credits. IEEE committee, section, chapter meetings would not meet the criteria.
- Individual events/courses shall follow the standard approval processes and practices detailed in section I.B.1 above
- Issuance of individual certificates are contingent upon meeting the Credentialing Program guidelines *and* submitting documentation to event organizers in a timely manner
- Internal partners shall follow written instructions from the IEEE Credentialing Program in order to process payments in a timely manner to Educational Activities. This includes reimbursed services payments, concentration banking, and credit card payments