



APPROVED PROVIDER PROGRAM

Las Vegas, NV • San Antonio, TX • Washington, DC
providers@payroll.org

APPROVED PROVIDER PROGRAM INFORMATION PACKET

INTRODUCTION

The Provider Program of PayrollOrg offers third-party education providers the opportunity to award recertification credit hours (RCHs) for their payroll-related educational offerings.

PAYO recommends that providers of payroll education enroll in the program and become designated as an Approved Provider of RCHs. The process requires the submission of all payroll education programs for approval. Changes or additions must be submitted to PAYO for approval.

The subject matter of continuing education **must** fall within the Payroll Body of Knowledge as defined by the content outlines of the FPC and CPP exams – Refer to Exam Content Outline and KSAs included on the PAYO Certification website:

- FPC [Exam Content Outline](#) and/or Knowledge Skills and Abilities (KSAs)
- CPP [Exam Content Outline](#) and/or Knowledge Skills and Abilities (KSAs)

SECTION I: BENEFITS


- Providers will receive an RCH logo for use on marketing materials. RCH logos can be used on attendee certificates, throughout the year during which the approval is effective.
- Recognition on the list of all approved providers and courses on the [Certification portion of PAYO's website](#).

SECTION II: APPLICATION PROCESS

Read and understand the entire Provider Application and determine if your educational events meet the guidelines and responsibilities of PAYO's Provider Program.


1. Submit the following materials for review:


- Completed and signed Provider Application
- Completed and signed Course Submission form
- Program documentation describing each course submission - including but not limited to course description, objectives, agenda, instructor short bios, etc.)

 **Attention:** Please submit documentation in PDF or Excel/Word file type. **Do not paste supporting information into the body of e-mail - your submission may be rejected for improper submission.**

2. Upon notification of reviewed course(s), an invoice will be returned to collect the appropriate fee(s).

3. PAYO will award Provider status on a calendar year basis – January 1 through December 31. Applications are accepted throughout the entire year; however, applications submitted throughout the year will only be valid through December 31 of the submission year. Applications submitted for prior years will only be valid for January to December of the year they were approved.

 **Attention:** Submissions **must be renewed each calendar year** if the provider wants to continue participation. Course documentation and payments must be submitted at time of renewal to be approved as outlined above.

 **Attention: REVIEW SECTION VII:** Identifying the appropriate content category on the Course Submission form per the definitions *Educational vs. Product/Software*; and Calculating expected RCHs.

SECTION III: AUTHORIZATION PROCESS

Applications are reviewed and processed **within 45 days of receipt** of application, regardless if it is a first-time submission or a renewal. Certification staff will attempt to approve submission as quickly as possible in the order that submissions come in, but please plan accordingly to allow 45 days for review.

PAYO will notify applicant of status and provide them with an invoice to collect the appropriate fee. For additional payment information, please refer to the Provider Fees section of this information packet.

SECTION IV: PROGRAM APPROVAL

Following receipt of the invoice payment, the course submission applicant will receive:

- List of the newly approved course titles along with the number of RCHs awarded and identifying course codes
- RCH logo(s) to use on completion certificates, brochures, and other marketing materials for the approved courses
- Recognition on the list of all approved courses on the Certification portion of PAYO's web site.
- Sample certificate of completion to use at the end of the approved course (upon request)



Attention: Course titles may be submitted for review retroactively within the same calendar year of course offered.

SECTION V: PROGRAM RENEWAL

To continue participation in the Provider program each year, providers must submit a completed Course Submission Form **for each new calendar year**. A calendar year is defined as January 1 to December 31.



Attention: This renewal policy applies to all courses regardless if the course title and content stays the same or if there are changes.

Course updates and changes such as length of time, title, delivery method, course description, etc. are considered as a new submission and will be charged the applicable fee(s).

Courses must be renewed each calendar year in order to receive RCHs, logos and be listed on the Certification portion of the PAYO website. The appropriate fees will apply to renewal submissions.



Attention: If you are a first-time applicant to participate in the Approved Provider Program, be sure to complete and return the **full** Provider Program Information Packet.

SECTION VI: PROGRAM DENIAL

- If a program is denied, the organization will be notified via email.
- Additional material may be submitted for reconsideration.
- Provider fees are non-refundable and are based on submission.



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SECTION VII: PROVIDER FEES

In-Person Education & Live and On-Demand Webinars

The Provider Fee for the first 100 in-person educational titles reviewed is \$60 per title. Each title submitted in excess of 100 in a calendar year (January 1 – December 31) is assessed a \$30 fee. There is no limit to the number of titles that may be submitted for approval. Fees are based on the number of titles submitted by PAYO.

❖ 0 to 100 Session Titles	-----	\$60.00 per title
❖ 101 or more Session Titles	-----	\$30.00 per title

Live and On-Demand Webinars will be treated the same as in-person educational titles as outlined above.

Please note that On-Demand Webinars will be treated as additional course titles to any and all comparable live webinar(s).

Conferences, Seminars, and Multi-Session Events

Conferences, seminars, and multi-session events will be charged according to the number of sessions submitted per the fee schedule below:

❖ 0 to 9 Session Titles	-----	\$150.00
❖ 10 to 19 Session Titles	-----	\$250.00
❖ 20 or more Session Titles	-----	\$350.00



Attention: Provider fees are **non-refundable** and are based on **submission** to the PAYO.

Course updates and changes such as length of time, title, delivery method, course description, etc are considered as a new submission and will be charged the applicable fee(s).

These fees apply to all for-profit, non-profit organizations and government agencies; as well as submissions to renew. Additional education programs may be added later in the same year by submitting the Course Submission Form - the appropriate fees will apply.

CONTACT US

Submit all Provider Applications/Course Submission Form/Supporting Documentation via e-mail **or** U.S. mail to the below address.



Attention: Please submit documentation in PDF or Excel/Word file type. **Do not paste supporting information into the body of e-mail** - your submission may be rejected for improper submission. For quicker processing, e-mail is the best way to submit courses for review.

Providers@payroll.org

OR

PayrollOrg
Attn: Certification Department
660 N. Main Ave, Suite 100
San Antonio, TX 78205

SECTION VII: TRAINING PROGRAM DETAILS

Complete the Course Submission Form (found in this packet) and include a list of your payroll-related education programs, seminars, and conferences, including program title or topic, agenda, and date(s) and location(s) offered. This information will be used to determine RCH creditworthiness.



Attention: The below **required** supporting information is essential to the review process and will be used to determine RCH eligibility.

- The following is part of the Course Submission form (within this packet) and must be completed for each course title.
 - Description of session topic, content details, and course description
 - Identify the course content topics and KSA domains
 - Identify content as Strictly Educational or Product/Software
 - Identify RCH value – copy of program agenda and course description is required
 - Identify format of course delivery
 - List of course objectives
 - Description of facilitator credentials and evaluation process
 - Description of the organization's process for course completion proof
 - Description of the process used by the organization to monitor attendee participation
 - Description of the organization's process to track attendance and course completion
 - If web-based training is being offered, proof must be submitted (in addition to the above) that the below Web-Based Training Requirements have been met
 - Including delivery method of the assessment tool, attendance tracking, and course completion process
- Web-Based Training Requirements
 - Internet based programs must have a live instructor while the program is being presented.
 - Program participants must be able to interact with the live instructor while the course is in progress (including the opportunity to ask questions and receive answers during the presentation).
 - Once a web-based program is recorded or archived for future presentation, it will continue to be considered a live web-based program only when a live subject matter expert is facilitating the recorded presentation.
 - Monitoring the participation of attendees is **required**. Delivery of the web-based training must include monitoring to verify that attendees are participating during the duration of the course.
 - The monitoring system must be frequent (at least every 10 - 20 minutes) and cannot be predicted by the participants (ex: interactive poll questions). This is to assure that participants are engaged in the training throughout the training event. If polling questions are used, **at least three poll questions must be used within a 60-minute time frame**.
 - Records of attendance showing the title and date of the internet-based training event, the name of attendees, email address, and their responses to polls or other monitoring mechanisms must be retained by the Provider for a minimum of 6 years.

On-Demand Training Requirements

- Each online course or recorded webinar participant must satisfactorily complete an online assessment tool (quiz, etc.) in order to obtain certificate and credit.
- To provide evidence of satisfactory completion of the course, PAYO Providers of web-based programs **must require participants to successfully complete a final examination with a minimum-passing grade of at least 80%**, a letter grade of “B” or course 3.0 GPA before issuing RCH credits.
- Final examinations must be performed in a secured and/or proctored method. Description of the test delivery method must be submitted for review to the PAYO.
 - Generally, we recommend at least exam 10 questions to determine if the student comprehends the educational content presented.

Strictly Educational vs. Product/Software-based

- The subject matter of continuing education **must** be identified as “strictly educational” or “product/software” on the course submission form for each course title per the definitions below:



Attention: Be sure to identify the appropriate content category on the Course Submission form per the definitions below.

- **Strictly Educational Courses (no product/software focus):**

“Pure payroll” educational courses have content that is strictly educational and **do not include product and/or software** specific content. References to products and software are allowed only when they are used as educational examples. Courses with content that is strictly educational and does not include any product or software specific content will be awarded one (1) unit per 60 minutes of educational time, excluding breaks. All other policies still apply.

Example: 1 hour of contact time would be awarded 1.0 RCH; 2 hours of contact time would be awarded 2.0 RCHs

- **Product/Software Courses:**

Product or software courses have content pertaining to specific company products, software, services, and/or are sales-focused. Courses with content pertaining to specific products, software, services, sales focus will be awarded half unit (0.5) per 60 minutes of educational time, excluding breaks. All other policies still apply.

Example: 1 hour of contact time would be awarded 0.5 RCH; 2 hours of contact time would be awarded 1.0 RCH

Calculating Recertification Credit Hours (RCH)

- **Strictly Educational:** Courses with **content that is strictly educational and does not include any product or software specific content** will be awarded one (1) unit per 60 minutes of educational time, excluding breaks. One (1.0) recertification credit hour (RCH) is awarded for each 60 minutes of content time (excluding breaks, etc). All other policies still apply.

Example: 1 hour of contact time would be awarded 1.0 RCH; 2 hours of contact time would be awarded 2.0 RCHs



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- **Product/Software-based:** Courses with **content pertaining to specific products, software, services, sales focus** will be awarded half unit (0.5) per 60 minutes of educational time, excluding breaks. Half (0.5) recertification credit hour (RCH) is awarded for each 60 minutes of content time (excluding breaks, etc). All other policies still apply.
Example: 1 hour of contact time would be awarded 0.5 RCH; 2 hours of contact time would be awarded 1.0 RCH

- Some portions of meetings, seminars, and conferences offer a variety of non-educational programming and activities, including entertainment, meals, exhibit halls, breaks, etc. Time for these non-educational activities does **not** qualify when calculating RCHs.

- For each program listed in your application, include the number of RCHs you expect to be awarded, based on the content category (strictly educational vs. software/product), the agenda, topic, and course outline of each program, **not including breaks and/or non-educational activities** as listed above. PAYO reserves the right to revise this number.

- To qualify for RCHs, education programs **must be payroll-related and the topics covered must fall within the scope of the Payroll Body of Knowledge as defined by the content outlines or Knowledge, Skills, and Abilities (KSAs)** of PAYO's CPP and FPC certification exams – please see the included Content Outline and KSAs in this packet or on the Certification portion of the PAYO [website](#).

➤ Acceptable Methods of Course Delivery:

- A classroom setting with an instructor
- Live conferences or seminars
- Live and on-demand webinars
- Instructor-led computer or web-based training

➤ Examples of programs/activities that would **NOT** qualify toward FPC or CPP recertification:

- Receipt of a certification, license, or college degree
- Participating in non-educational, non-payroll related programs
- The non-educational portion of education programs (breaks, lunch, and exhibit hall)
- Membership in related associations
- Reading industry publications
- Serving on an industry-related board or committee
- Normal business operations, such as implementing systems or processing payroll

SECTION IX: PROVIDER PROGRAM CRITERIA

PAYO Providers agree to meet all of the following criteria. Failure to meet one or more of the program criteria could result in revocation of Approved Provider status. Be sure to **SAVE** this form to your Desktop prior to filling out.

- **Audit** – PAYO reserves the right to randomly audit Approved Providers to ensure compliance with the established criteria and terms of agreement. If audited, the PAYO may request to review an Authorized Provider's program records, including but not limited to marketing materials, program materials, attendee lists, evaluation reports, and facilitator's credentials. PAYO reserves the right to audit/attend a Provider's program at no cost to the PAYO.
- **Content and Program Materials** – The content and program materials for each education program must be relevant to the payroll industry. A copy of the course description and content outline or agenda of each course, seminar, computer- or web- based program, and webinar **must be provided to PAYO** as part of the application.
- **Facilitators** - The provider ensures that all instructors and presenters are qualified to facilitate the education program. Facilitators must be competent in the subject matter and understand the education program's purpose. Participants should be given the opportunity to assess the facilitator's knowledge and instructional skills at the conclusion of each education program.
- **Marketing Education Programs** - The provider is encouraged to indicate on education program marketing materials the topics covered, targeted audience, program agenda, and applicable approved recertification credit hours (if determined to be a Provider).
- **Means for Awarding Recertification Credit Hours** - The provider should have defined means to accurately award program participants the applicable recertification credit hours (RCH).
- **Organization** - The provider must have an identifiable continuing education or training unit or group with responsibility for administering education programs.
- **Program Environment** - The provider ensures that programs are held in an environment conducive to learning. For Webinars and computer- and Web-based training programs, the provider must clearly inform participants, prior to registration, of minimum software and/or hardware requirements.
- **Program Evaluation** - The provider ensures that all education programs are evaluated. Evaluations should be compiled, and a report produced summarizing the program, including, but not limited to: the program's title, the date and location conducted, the facilitator, and any comments provided by participants. Providers should be prepared to provide copies of program evaluation reports to PAYO upon request.
- **Responsibility and Control** - The provider, through its continuing education or training unit, ensures that the criteria established by PAYO are met. Changes in contact information should be reported to the PAYO within 30 days.



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PAYO PROVIDER PROGRAM APPLICATION

The sections below should be completed with each course title submission.



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PART I: PROVIDER TERMS OF AGREEMENT

This agreement is between the PayrollOrg (PAYO) and _____ (“Provider Name”) regarding the provider’s participation in the PAYO’s Provider Program. This agreement goes into effect when signed by the provider and the application has been approved by PayrollOrg. The Provider agrees to the following:

- Provider agrees to securely retain records documenting who has attended approved programs, and that such records be made available to an attendee if requested. Proof of attendance should be retained for a minimum of six (6) years.
- PAYO will issue a non-transferable RCH logo to be used only in a manner specified by PAYO. Providers are prohibited from displaying the logo on materials referring to courses that have not been approved by PAYO. The RCH logo must be imprinted on a certificate of completion or other proof of attendance.
- PAYO will issue an assigned course code(s) for each educational event approved. The course code(s) must be imprinted on a certificate of completion.
- Provider agrees to issue PAYO one (1) complimentary course registration upon request to any approved education event for a designated PAYO representative to ensure compliance with the established criteria and terms of agreement of the Provider Program.
- Provider agrees to furnish PAYO with program records, including but not limited to marketing and program materials, attendee lists, evaluation reports and facilitator’s credentials, if selected for audit.
- Provider agrees to notify PAYO immediately of any significant content or program time change for an existing pre-approved educational event.
- Provider agrees to conduct their educational events in an ethical manner that respects the rights and worth of the people they serve.
- PAYO reserves the right to revoke a Provider’s approval status if it is determined that the Provider is in violation of one or more of the terms of agreement.
- If a Provider’s status is revoked they are not eligible to submit a Provider application for 12 months following notice of revocation of approved status. A Provider may appeal the revocation of an education program or the ability to claim Provider status to PAYO’s Certification Board.

First and Last Name (please PRINT): _____

Title: _____ Company: _____

Signature: _____ Date Signed: _____



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PART II: PROVIDER CONTACT INFORMATION

Please complete all sections. If necessary, attach required supporting documentation in PDF or Excel/Word document. Be sure to **SAVE** this form to your Desktop prior to filling out.

1. Please complete the below information on behalf of the Continuing Education/Training Organization. Be sure to update this information with the PAYO when necessary.

Company/Organization Name: _____

Website Address: _____

Address: _____

City, State, Zip Code: _____

2. Please complete the below information of the main Point of Contact on behalf of the Continuing Education/Training Organization. Be sure to update this information with the PAYO when necessary.

Contact Name: _____

Contact Email: _____

Contact Phone Number: _____

Contact Fax Number: _____

3. Please answer the following questions.

1. Indicate on which of the following document(s) the PAYO RCH logo will be displayed (check all that apply)

Marketing Materials

On-Site Materials

Certificate of Program Completion

Proof of Attendance

2. Indicate the approximate number of different payroll-related continuing education events your organization anticipates conducting during the upcoming calendar year.

of Programs: _____

3. Are your organization's continuing education programs approved by another entity or entities?

YES

NO

If yes, please list the entity/entities: _____

4. Does your organization ensure that its education programs are held in facilities that provide an environment conducive to learning?

YES

NO



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PART III: COURSE SUBMISSION FORM

Complete the following items for each course submission. Incompletes may be rejected and denied approval. If additional space is needed, please submit on a PDF or Excel/Word file type. Be sure to **SAVE** this form to your Desktop prior to filling out.

Session Topic and Content

- ❖ Course Title _____
- Has this exact course been submitted to PAYO or offered for RCHs before? YES NO
- If yes, please list title here _____
- ❖ List all possible date(s) the course will be offered during the calendar year of submission (MM/DD/YYYY)
- ❖ Write a Brief Course Description (minimum 50 words, or more).

Exam Content Outline or KSA Domain(s)

Refer to the following to help you identify the appropriate payroll content area(s):

- FPC [Exam Content Outline](#) and/or Knowledge Skills and Abilities (KSAs)
- CPP [Exam Content Outline](#) and/or Knowledge Skills and Abilities (KSAs)
- ❖ List all applicable Exam Content Topic(s) or KSA Domain(s) for the course.
- ❖ Identify content as: Strictly Educational **OR** Product/Software
- ❖ List the number of RCHs for the expected contact time to be awarded: _____ RCHs.

*The total number of RCH awarded is based on the content selected (educational vs. product/software), agenda, topic, and course outline of each program (not including breaks and/or non-educational activities). PAYO reserves the right to revise this number. A copy of the program agenda is **required** for verification purposes.*

- ❖ Indicated the format of delivery. Is this course a(n):
 - In-person course
 - Conference/Seminar course/Multi-session course
 - Instructor-led computer or webinar course
 - On-Demand web-based course
 - College accredited course

Learning Objectives

- ❖ State at least three (3) clearly relevant learning objective or industry related purpose for the program. A learning objective completes the phrase, “At the end of this program, the learner will be able to...”
 - 1)
 - 2)
 - 3)

Facilitator Credentials and Evaluation

- ❖ Provide a short description of the process your organization uses to identify and screen facilitators to determine if they are competent in the subject matter being offered and have the knowledge and skills to facilitate your educational event. You may include instructor names, titles, and years of related experience.

- ❖ Describe the process used by your organization to monitor and provide feedback for the facilitators and the program overall. Please provide a sample evaluation used for your education program.

Student Evaluations and Proof of RCHs

In-Person Course or Live Webinar

Each participant who satisfactorily completes a course **must receive a certificate or some other form of official confirmation of course completion** from the Provider.



Attention: Review the section on Web-based Training Requirements within the Approved Provider Information Packet for further details.

Fill in details on next page.

- ❖ Include a short description of the process your organization uses to provide participants with **proof of earned RCHs**; include the delivery method and type of proof (i.e. certificate, transcript, via e-mail, mail, software, etc).

Monitoring the participation of attendees is **required** to verify that attendees are participating during the duration of the course. For Live Webinars, the monitoring system must be frequent (at least every 10 - 20 minutes) and cannot be predicted by the participants (ex: interactive poll questions). If polling questions are used, **at least three poll questions must be used within a 60-minute time frame.**

- ❖ Describe the process used by your organization to monitor attendee participation during the course.

- ❖ Describe the process used by your organization to track attendance and course completion.

Online Courses or Recorded Webinars

In addition to the above requirements, if a course is online/on-demand (without a live instructor) or is recorded, the below must be included in the provider course submission.

Each online/on-demand course or recorded webinar participant must satisfactorily complete an online assessment tool (quiz, etc.) in order to obtain certificate and credit. PAYO Providers of web-based programs must require participants to successfully complete a final examination with a minimum-passing grade of **at least 80%, a letter grade of “B” or course 3.0 GPA** before issuing RCH credits.



Attention: Review the section on On-Demand Training Requirements within the Approved Provider Information Packet for further details.

- ❖ Describe the test delivery method and the online assessment tool (quiz, etc.) that will be used by the organization to determine if attendees will receive a certificate or some other form of course completion confirmation.



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Attention: For quicker processing, e-mail is the best way to submit courses for review. If sending electronically, please submit documentation in PDF or Excel/Word file type. **Do not paste supporting information into the body of e-mail.** Be sure that you have read the Approved Provider Information Packet in its entirety. All items must be filled out and supporting documentation must be attached for each course submission. Your application may be rejected for improper submittal.

E-mail: Providers@payroll.org

OR

U.S. Mail:

PayrollOrg

Attn: Certification Department

660 N. Main Ave, Suite 100

San Antonio, TX 78205