Checklist for Ethics Courses presented by Local Luncheon Groups

The IPT Board of Governors has mandated a requirement that members who hold IPT’s Certified Member of the Institute (CMI) Designation in any discipline must complete 5 hours of ethics training, including 3 hours at IPT events every 5 years, in order to maintain their designation.

This checklist serves as a guideline for Local Luncheon Groups to use in developing speakers to assist CMIs in meeting this requirement.

1. All of the following information must be uploaded digitally using this link:
   

2. The session should be approved by IPT’s Education Technology and Distance Learning Manager at least 15 days prior to presentation.

3. The session must be based on IPT’s Code of Ethics and implementing regulations and procedures.

4. The speaker must attach specific learning objectives and an outline or copy of the presentation with this approval request.

5. The presentation must qualify for at least 1 CE unit as defined by IPT standards. This is currently defined as 50 minutes of instruction on the topic.

6. In order to earn the CE credit for approved ethics or any other credits, the Local Luncheon Group is required to submit a sign-in sheet attesting to member’s attendance, whether or not the member holds the CMI designation and signature. This sheet should be verified by the Local Luncheon Group Chair or designee. If NASBA credit is also requested, the required information regarding NASBA accreditation, found in Appendix C, should also be submitted.

The information below will be needed to complete the online submission:

- Name of Local Luncheon Group
- Person submitting form
- Phone Number
- Date of Meeting
- Location of meeting
- Speaker’s Name and Company
  - The session’s learning objectives and a session description (REQUIRED).
  - The IPT Code of Ethics Canons (list by number) that the presentation will cover
  - Whether the speaker has presented an ethics session at a national IPT event and a statement identifying the event name and year.
- Attestation by the Local Luncheon Group Chair or designee to the following statement: I understand that if this session is approved, it is my responsibility to verify the time the speaker presented and submit the Local Luncheon Group sign—in sheet after this event so that the CMIs can be awarded appropriate credit.