



# **Change Request Provider Level Approval Add Format**

## Change Type – Provider Approval

### Add Format

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Providers with provider level approval wishing to offer courses in a new format may submit an add format change request, course sample and fee (\$175 per format) at any time during their approval period.

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Payment of fees and application submission does not constitute approval of the new format. The add format fee covers consideration of the request and review of materials only.

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The provider may not offer courses in the new format until ACE grants official approval.

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New formats approved will be effective on the date approved and for the remainder of the CE providers current ACE approval period.

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When the new format is approved, email notice will be sent to the providers primary contact and CE director.

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Once approved, the add format change request will reflect a status of approved.

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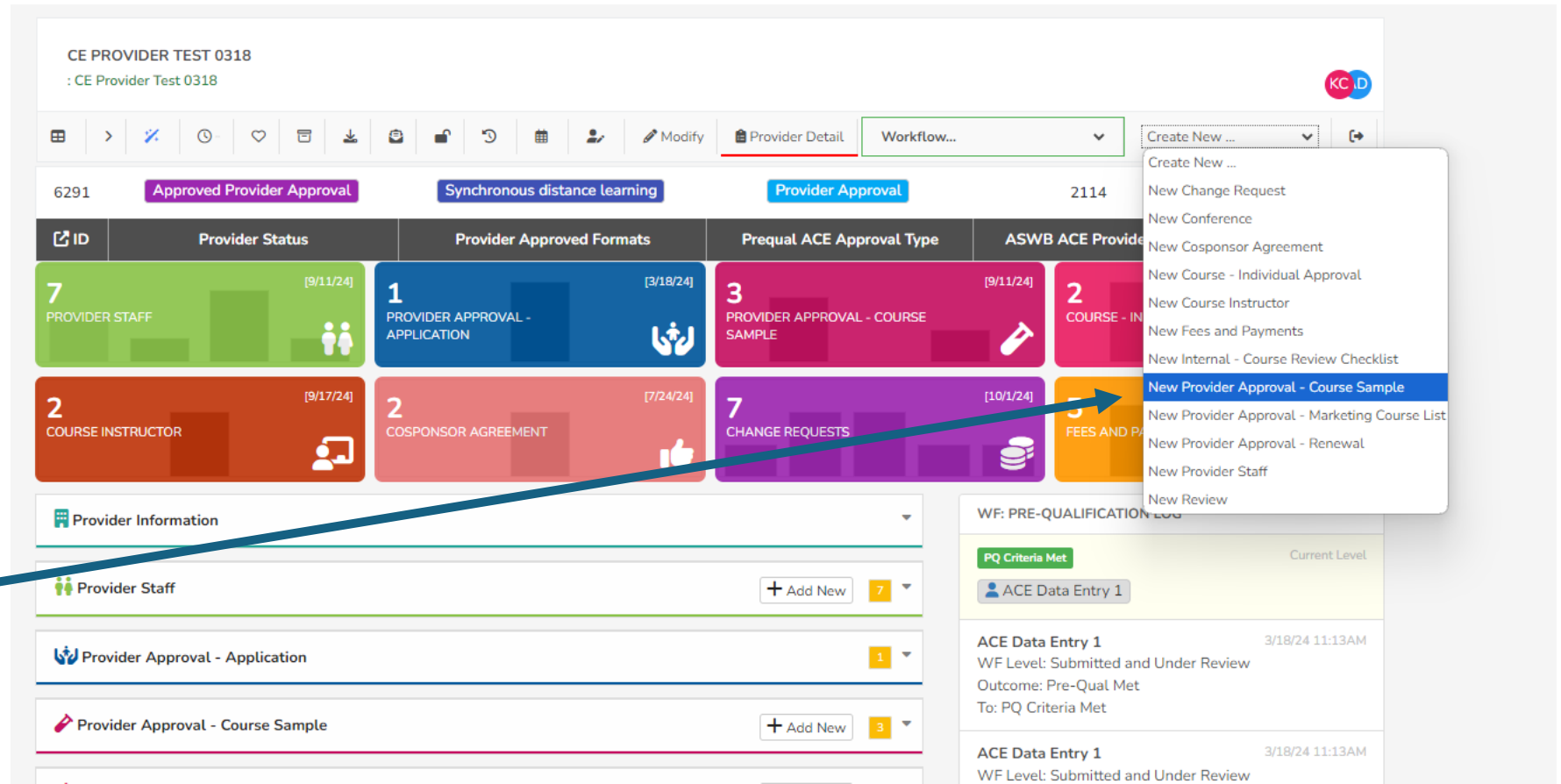
Learn more about adding a format in the ACE provider procedures located in the provider appendix [here](#).

# Entering a Course Sample

The first step in adding a format is entering the new course sample.

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

From the dropdown list, click New Provider Approval- Course Sample.



The screenshot shows the ACE provider portal interface for 'CE PROVIDER TEST 0318'. The dashboard includes several cards representing different provider statuses and approval types, such as 'Approved Provider Approval', 'Synchronous distance learning', and 'Provider Approval'. A dropdown menu is open, showing a list of options including 'New Provider Approval - Course Sample', which is highlighted. A blue arrow points from the text in the blue box to this menu item. Below the dashboard, there are sections for 'Provider Information', 'Provider Staff', 'Provider Approval - Application', and 'Provider Approval - Course Sample', each with an 'Add New' button and a count of items.

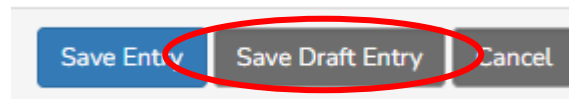
## Entering a Course Sample- cont'd

The following areas for each course sample require completion:

- Course Sample Information
- Cosponsorship and Conferences
- General Information
- Credit Information and Credit Type
- Other Information
- Evaluation and Quality
- Distance Learning, if applicable
- Attachments/ Required Documentation

Questions requiring a response or selection are identified with an \*.

The course sample can be saved and completed later by clicking the “save draft entry” button.



If “save entry” is clicked and the required fields are not complete, the user will receive an error message outlining the fields that require completion to proceed.

# Accessing a Course Sample – In Draft

If save draft entry is selected, the user can continue working on the course sample by selecting modify entry from within the course sample.

OR

From the provider details screen of the provider record, expand the Provider Approval - Course Sample section and select the pencil icon beside the course sample to open it for editing.

You can return to this page later to continue updating this record by clicking on the Modify Entry button.

CE PROVIDER TEST 0318 DRAFT  
 Treating PTSD AD

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

6291	1419	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

**Provider Approval - Course Sample** 4

Status	Not Submitted
Is Hybrid Course	No
Delivery Format	In-Person

CE PROVIDER TEST 0318  
 : CE Provider Test 0318 KC D

Provider Staff + Add New 7

Provider Approval - Application 1

**Provider Approval - Course Sample** + Add New 4

	Status	Delivery Format	Course Title	Cosponsor Agreement Link	Conference Link
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Share</a>	Not Submitted	In-Person	Treating PTSD		
<a href="#">View</a> <a href="#">Edit</a> <a href="#">Share</a>	Sample Approved	Synchronous Distance Learning	test add format WE		

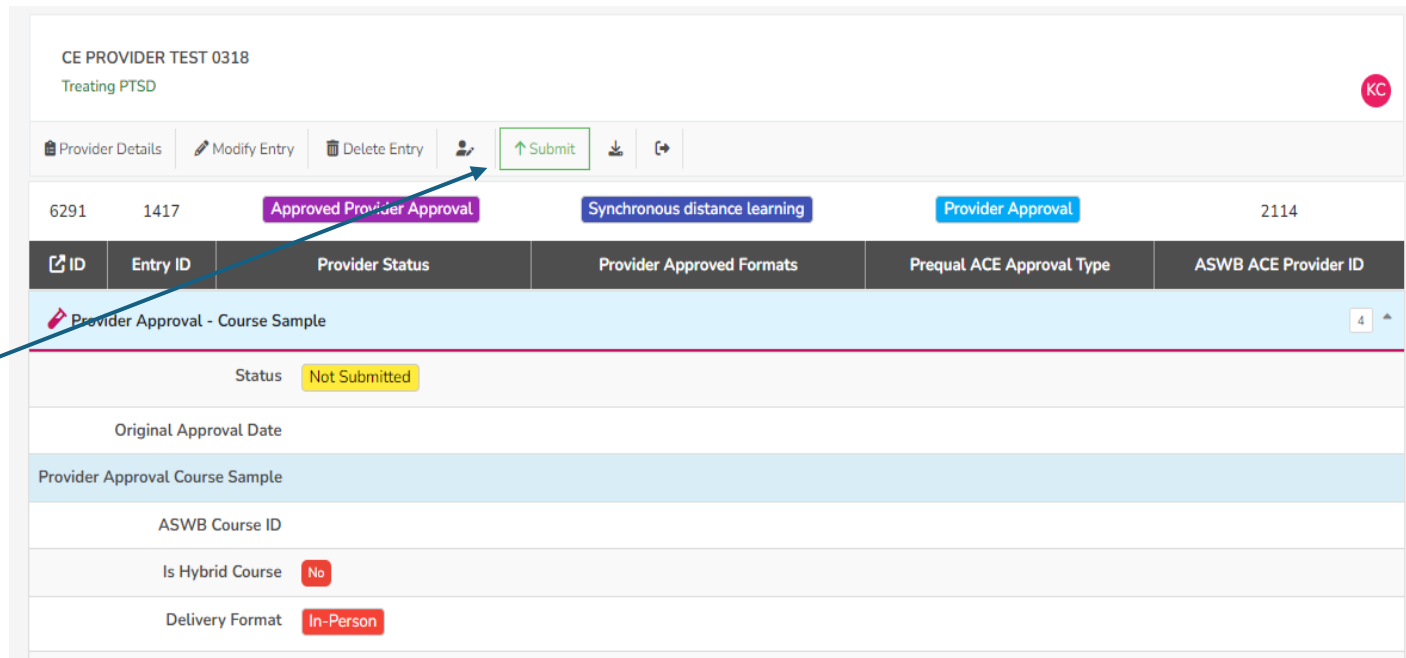
- ACE application user guide - Helprut tips
- ACE application user guide - Individual course appr...
- ACE application user guide - Making updates
- ACE application user guide - Prequalification request
- ACE application user guide - Provider application
- ACE application user guide - Provider renewal
- ACE-Handbook-12.2023
- ASWBProviderRenewalCourseListTemplate

# Course Sample –Submit

Once the course sample is complete and saved, the next step is to submit.

Click submit.

Click Provider Details to return to the detail page of the provider record.



The screenshot displays the 'CE PROVIDER TEST 0318' interface for 'Treating PTSD'. At the top right, there is a red 'KC' badge. Below the title, a navigation bar includes 'Provider Details', 'Modify Entry', 'Delete Entry', and a green 'Submit' button with an upward arrow icon. A table below shows course details: '6291' (ID), '1417' (Entry ID), 'Approved Provider Approval' (status), 'Synchronous distance learning' (format), 'Provider Approval' (type), and '2114' (ASWB ACE Provider ID). A table header lists 'ID', 'Entry ID', 'Provider Status', 'Provider Approved Formats', 'Prequal ACE Approval Type', and 'ASWB ACE Provider ID'. Below this, a section titled 'Provider Approval - Course Sample' shows a 'Status' of 'Not Submitted' in a yellow box. Other fields include 'Original Approval Date', 'Provider Approval Course Sample', 'ASWB Course ID', 'Is Hybrid Course' (No), and 'Delivery Format' (In-Person).

# Course Sample – Successful Entry

From the provider details screen, confirm successful entry of the course sample by expanding the Provider Approval- Course Sample section.

The status of the course sample will reflect submitted and under review.

CE PROVIDER TEST 0318  
: CE Provider Test 0318

Provider Detail

ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID	Pre-Qualification
7	PROVIDER STAFF [9/11/24]	1 PROVIDER APPROVAL - APPLICATION [3/18/24]	4 PROVIDER APPROVAL - COURSE SAMPLE [10/1/24]	2 COURSE - INDIVIDUAL APPROVAL [9/11/24]	
2	COURSE INSTRUCTOR [9/17/24]	2 COSPONSOR AGREEMENT [7/24/24]	7 CHANGE REQUESTS [10/1/24]	5 FEES AND PAYMENTS [9/11/24]	

Provider Information

Provider Staff + Add New 7

Provider Approval - Application 1

Provider Approval - Course Sample + Add New 4

Status	Delivery Format	Course Title	Cosponsor Agreement Link	Conference Link
Submitted and Under Review	In-Person	Treating PTSD		
Submitted and	Synchronous Distance	test add format		

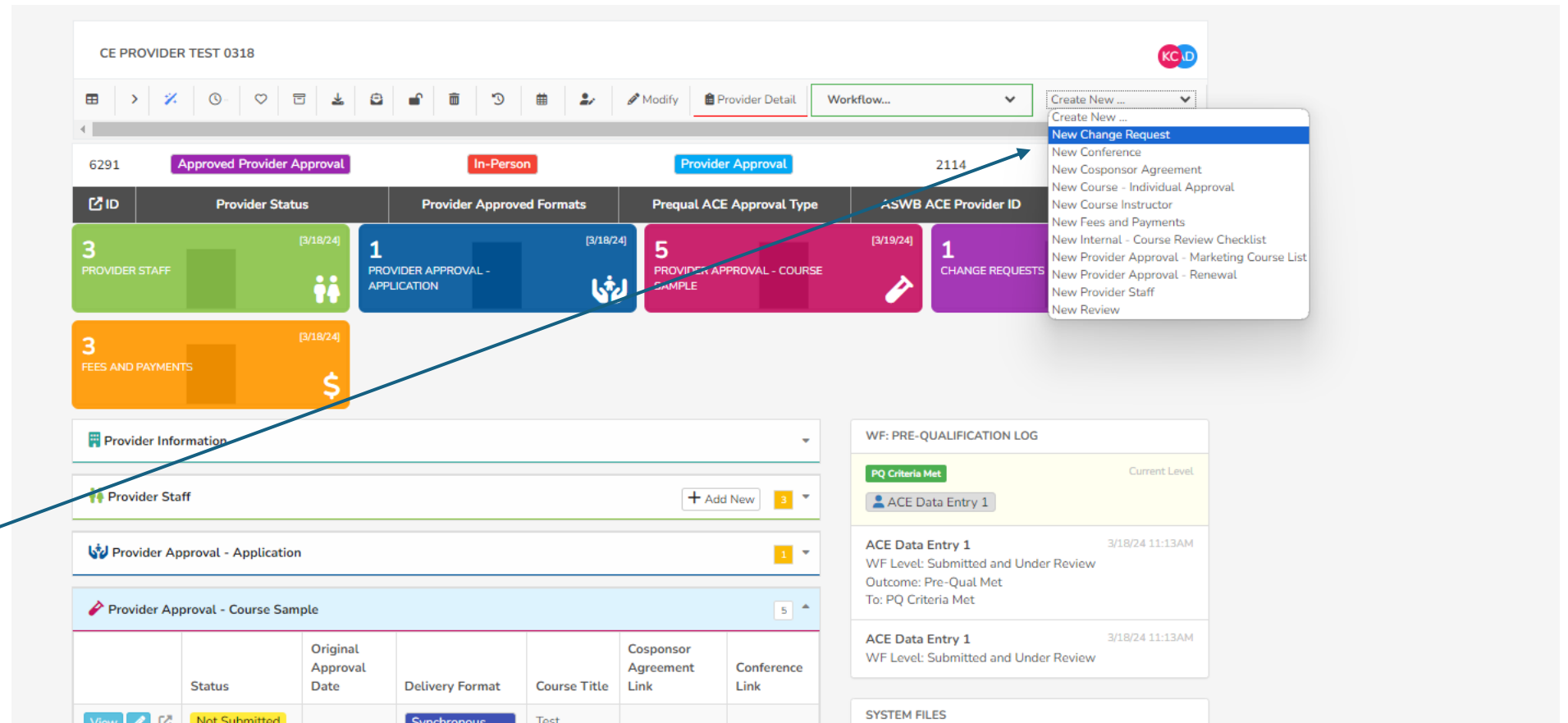
SYSTEM FILES

- 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

# Entering a New Change Request

Once the course sample is successfully saved and submitted in the system, the next step is to create a new change request for the add format.

From the Create New dropdown, click New Change Request.



The screenshot displays the ACE system interface for 'CE PROVIDER TEST 0318'. The top navigation bar includes a 'Create New ...' dropdown menu, which is currently open, showing options such as 'New Change Request', 'New Conference', 'New Cosponsor Agreement', 'New Course - Individual Approval', 'New Course Instructor', 'New Fees and Payments', 'New Internal - Course Review Checklist', 'New Provider Approval - Marketing Course List', 'New Provider Approval - Renewal', 'New Provider Staff', and 'New Review'. The 'New Change Request' option is highlighted in blue. Below the navigation bar, the main content area shows a list of approval steps: '3 PROVIDER STAFF', '3 FEES AND PAYMENTS', '1 PROVIDER APPROVAL - APPLICATION', '5 PROVIDER APPROVAL - COURSE SAMPLE', and '1 CHANGE REQUESTS'. The '1 CHANGE REQUESTS' step is highlighted in purple. The right-hand sidebar contains a 'WF: PRE-QUALIFICATION LOG' section with a 'PQ Criteria Met' status and a table of 'ACE Data Entry 1' records.

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

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



## Change Request Entry

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

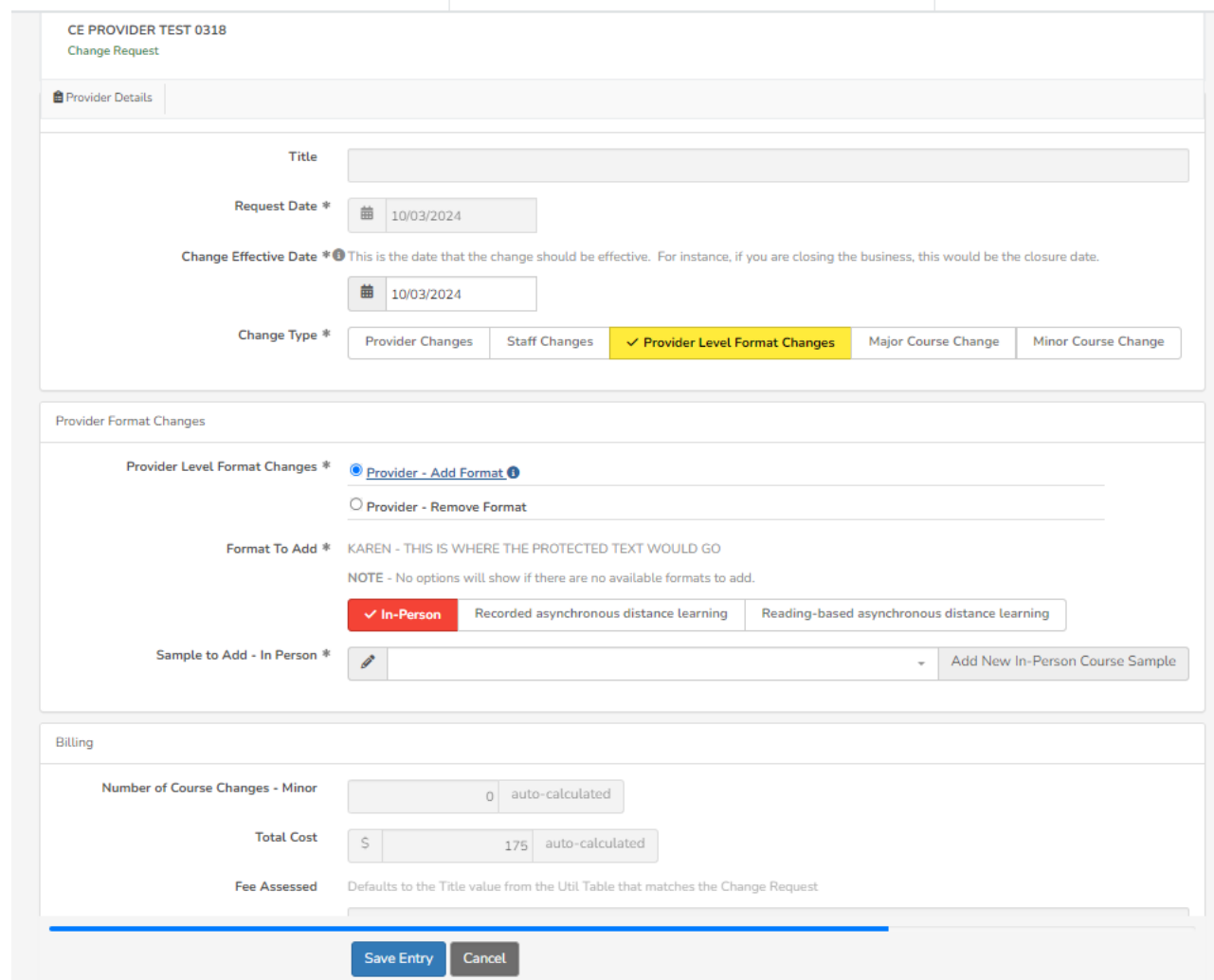
Select provider level format changes as the change type.

Select provider- add format as the provider level format change.

Select the format to add from the available options.

Click the dropdown in the sample to add field and select the course title of the course sample.

Once the course title populates in the box, complete the signature section and click save entry.



The screenshot shows a web form titled "CE PROVIDER TEST 0318 Change Request". The form is divided into several sections:

- Provider Details:** Includes fields for Title, Request Date (10/03/2024), Change Effective Date (10/03/2024), and Change Type. The "Provider Level Format Changes" option is selected.
- Provider Format Changes:** Includes "Provider Level Format Changes" (with "Provider - Add Format" selected), "Format To Add" (KAREN - THIS IS WHERE THE PROTECTED TEXT WOULD GO), and "Sample to Add - In Person" (with "In-Person" selected and "Recorded asynchronous distance learning" chosen).
- Billing:** Includes "Number of Course Changes - Minor" (0 auto-calculated), "Total Cost" (\$175 auto-calculated), and "Fee Assessed" (Defaults to the Title value from the Util Table that matches the Change Request).

At the bottom, there are "Save Entry" and "Cancel" buttons.

# Payment

Select "Pay by CC" or "Pay by Check"

CE PROVIDER TEST 0318  
 Provider Level Format Changes - Provider - Add Format AD

[Provider Details](#) | 
 [Modify Entry](#) | 
 [Download](#) | 
 [Share](#) | 
 [Pay By CC](#) | 
 [Pay By Check](#)

6291	1462	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** 8

<b>Title</b>	Provider Level Format Changes - Provider - Add Format
<b>Request Date</b>	10/3/2024
<b>Change Effective Date</b>	10/3/2024
<b>Change Type</b>	Provider Level Format Changes

**Provider Changes**

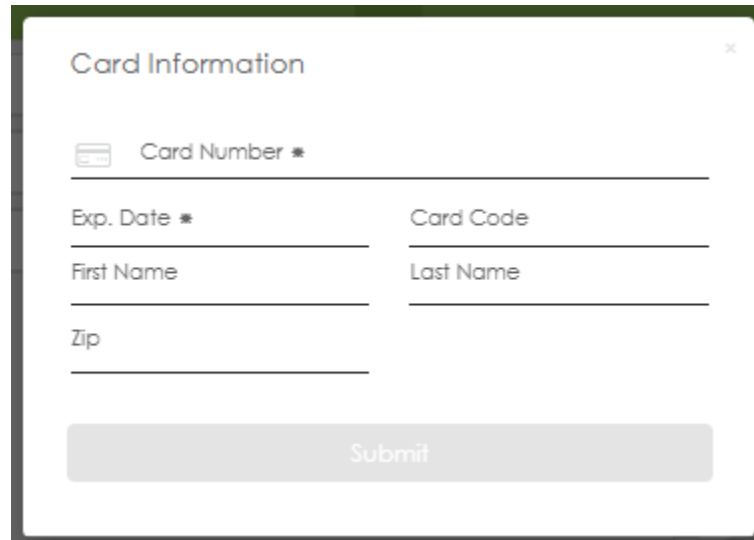
**Staff Changes**

**Provider Format Changes**

Provider Level Format Changes	Provider - Add Format
<b>Format To Add</b>	In-Person
Sample to Add - In Person	Treating PTSD

## Payment – Credit Card

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

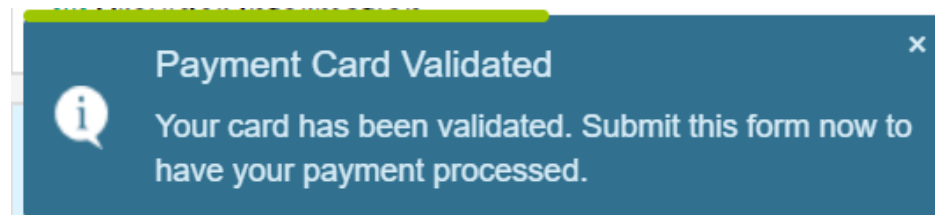


The screenshot shows a form titled "Card Information" with a close button (x) in the top right corner. The form contains the following fields:

- Card Number \*
- Exp. Date \*
- Card Code
- First Name
- Last Name
- 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 \$175.00 applied.

CE PROVIDER TEST 0318  
Provider Level Format Changes - Provider - Add Format

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

ID	Entry ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID
6291	1462	Approved Provider Approval	Synchronous distance learning	Provider Approval	2114

**Change Request**

Title: Provider Level Format Changes - Provider - Add Format

Request Date: 10/3/2024

Change Effective Date: 10/3/2024

Change Type: **Provider Level Format Changes**


Provider Changes

Staff Changes

Provider Format Changes

Provider Level Format Changes: **Provider - Add Format**

Format To Add: **In-Person**

Sample to Add - In Person:  Treating PTSD

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

Provider Detail

7 PROVIDER STAFF [9/11/24]

1 PROVIDER APPROVAL - APPLICATION [3/18/24]

4 PROVIDER APPROVAL - COURSE SAMPLE [10/1/24]

2 COURSE - INDIVIDUAL APPROVAL [9/11/24]

2 COURSE INSTRUCTOR [9/17/24]

2 COSPONSOR AGREEMENT [7/24/24]

8 CHANGE REQUESTS [10/3/24]

6 FEES AND PAYMENTS [10/3/24]

Provider Information

Provider Staff + Add New 7

Provider Approval - Application 1

Provider Approval - Course Sample + Add New 4

Course - Individual Approval + Add New 2

Course Instructor + Add New 2


Cosponsor Agreement + Add New 2

Change Request + Add New 8

SYSTEM FILES

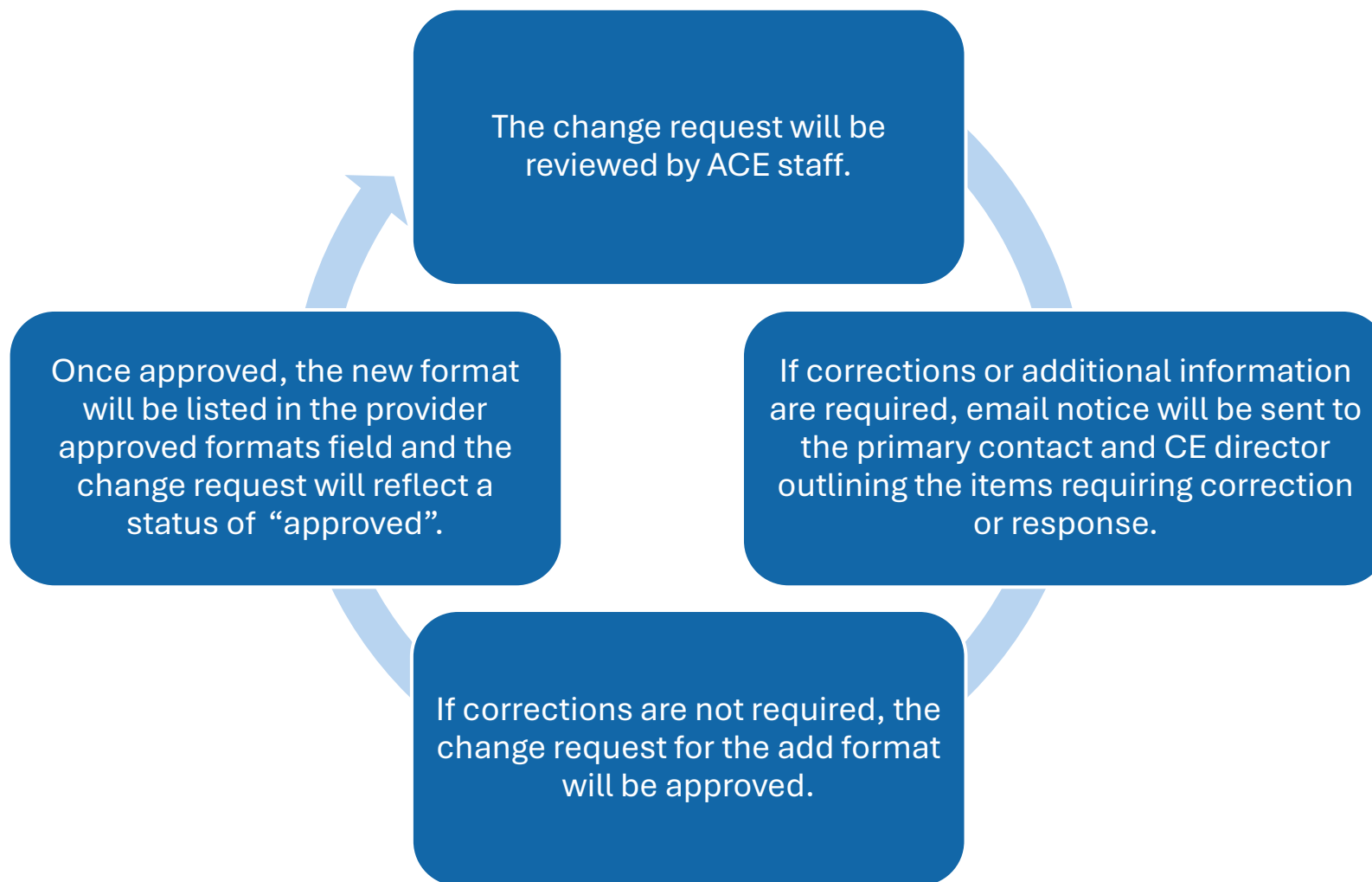
- ACE application user guide - Helpful tips
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- ACE application user guide - Provider application
- ACE application user guide - Provider renewal
- ACE-Handbook-12.2023
- ASWBProviderRenewalCourseListTemplate
- Cosponsor-Agreement-Template
- Provider Staff Agreement
- Renewal provider agreement

MAP



	Title	Status	Change Effective Date	Change Type	Course To Change	Course Instructor / Speaker
<a href="#">View</a>	Provider Level Format Changes - Provider - Add Format	Submitted and Under Review	10/3/2024	Provider Level Format Changes		

## Change Request - Review Process



# Change Request Approved

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

The new format will be listed in the provider approved formats field on the provider details page.

CE PROVIDER TEST 0318  
: CE Provider Test 0318

6291 Approved Provider Approval Synchronous distance learning In-Person Provider Approval 2114 PQ Criteria Met

ID	Provider Status	Provider Approved Formats	Prequal ACE Approval Type	ASWB ACE Provider ID	Pre-Qualification
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2	COURSE INSTRUCTOR [9/17/24]	8 CHANGE REQUESTS [10/3/24]	6 FEES AND PAYMENTS [10/3/24]		

Provider Information

Provider Staff + Add New 7

Provider Approval - Application 1

Provider Approval - Course Sample + Add New 4

Course - Individual Approval + Add New 2

Course Instructor + Add New 2

Change Request + Add New 8

Title	Status	Change Effective Date	Change Type	Course To Change	Course Instructor / Speaker
Provider Level Format Changes - Provider - Add Format	Approved	10/3/2024	Provider Level Format Changes		

WF: PRE-QUALIFICATION LOG

PQ Criteria Met Current Level

ACE Data Entry 1

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

- 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