

ANA NASBA Policies

Administrative Policies

Record Retention Policy:

In accordance with Standard No. 24, the following documentation for each Group Live and Blended program shall be maintained for a period not less than 5 years:

- Records of participation
- Dates and locations of program offerings
- Author/instructor, author/developer and reviewer names and credentials (including the state of licensure, CPA license number, and status of license)
- Number of CPE credits earned by participants
- Results of program evaluations
- Program descriptive materials, including course announcement information, program agenda and handouts, and speaker notes if applicable.

Refund Policy:

For group live and blended events, cancellations, and requests for refunds must be communicated in writing to registration@ana.net 10 or more calendar days in advance of the event.

- A full refund for in-person registration will be granted, if written request for cancellation is received by email 10 or more calendar days before the conference start date or you may transfer your registration to a colleague at no additional cost.
- In-person registration may be converted to virtual at any time before the conference starts. If there is a price difference, a refund will be granted 10 or more calendar days before the conference starts. If converted less than 10 days out, no refund will be granted.
- Corporate packages are not eligible for cancellation or refunds.
- Unused registrations/applications have no monetary value and cannot be credited to future years or events.
- ANA will not issue refunds or credits due to failure to redeem a discount promo code during the registration process.
- Hotel room cancellations and changes must be made directly with the hotel.

Program Cancellation Policy:

If ANA needs to cancel or reschedule an event, we will contact the registrants by email immediately and provide an opportunity to reschedule. Full refunds will be provided to registered participants if the event is cancelled or if participants are unable to attend the rescheduled event.

Complaint Resolution Policy:

The ANA will make every effort to provide the best events possible. If a participant is not completely satisfied with the training course and wishes to file a complaint, please contact Inna Stolyarova at registration@ana.net within 10 business days of the event.

Course Update Policy:

In accordance with Standard No. 4, materials will contain the most recent publication, revision, or review date. Event session content will be revised as soon as feasible following changes to relative codes, laws, rulings, decisions, interpretations, etc. All learning content will be developed by individuals having expertise in the subject matter. All event session courses are reviewed annually.