

Introducing

TRACE

tracking your CE



AMERICAN ACADEMY *of* ACTUARIES

TRACE
tracking your CE

***An exciting, new online
member service from the
American Academy of
Actuaries***

TRACE

tracking your CE



AMERICAN ACADEMY *of* ACTUARIES

TRACE
tracking your CE

TRACE makes it fast and easy to maintain your CE and EA credits

- ▲ Available for actuaries in ALL practice areas
- ▲ Keeps track of all your credits in ONE PLACE, accessible online, 24/7
- ▲ Free, web based, and secure
- ▲ Members can access TRACE from the members'-only page of the Academy web site: www.actuary.org



TRACE Welcome

The screenshot shows the TRACE website interface. At the top left is a search bar with a 'Search' button. To the right is a 'Member log-in' link. The main header features the TRACE logo and the tagline 'tracking your CE'. Below this is a 'Welcome to TRACE™' section with a paragraph explaining the tool's purpose. To the right of the main content is a sidebar with a 'Contingencies' article titled 'FUTURE SHOCK: The Subprime Crisis and Property/Casualty Insurers'. Three yellow callout boxes with black outlines and orange stars point to specific elements: the first points to the 'Get started' section, the second points to the 'Terms of service' section, and the third points to the 'Login to TRACE and get started!' callout. The left sidebar contains a list of navigation links: About us, Newsroom, Publications, Issues, Calendar of events, Jobs, Membership, Code of Conduct, TRACE, ASB, ABCD, Profession-wide search, Find an actuary, and Links. The footer contains links for Search, Site index, Contact us, and Back to top.

Search

Member log-in

TRACE

tracking your CE

Welcome to TRACE™

This new easy-to-use online recordkeeping tool is created as a special value to American Academy of Actuaries members to help keep track of your continuing education activities and credits, as required by the profession's *Qualification Standards for Actuaries Issuing Statement of Actuarial Opinions in the U.S.*

Learn how to use TRACE™

View a brief [tutorial](#) on how to use TRACE™.

Get started

[Login](#) to the Academy member site to start using TRACE™.

Terms of service

This online CE tracking tool is hosted by a third-party vendor, and therefore, the Academy makes no representations, warranties, or guarantees in connection with the user's use of this product. User acknowledges and agrees that the Academy exercises no control over, and accepts no responsibility for, the content and information passing through this database. User further acknowledges and agrees to the disclaimers of warranties, limitations of liabilities, indemnifications, service of subpoena policy, and other provisions contained in the [Terms of Service](#).

CE credit questions

If you have questions regarding the U.S. Qualification Standards, check out our easy to use [FAQ](#). If you have additional questions, [forward them to the Academy](#).

Technology questions

Users should direct questions regarding the technical use (not standards-related) to our web manager at trace@actuary.org.

[Search](#) | [Site index](#) | [Contact us](#)
[Back to top](#)

TRACE
tracking your CE

Contingencies

FUTURE SHOCK
The Subprime Crisis and Property/Casualty Insurers

Contingencies

Academy Supports
Systemic Risk Regulator

Webinar Highlights
Loss Reserve Case Studies

Actuarial

Links

Find an actuary

Profession-wide search

ABCD

ASB

TRACE

Code of Conduct

Membership

Jobs

Calendar of events

Issues

Publications

Newsroom

About us

Link to
Qualification
Standards

Link to TRACE
tutorial

Login to TRACE
and get started!



AMERICAN ACADEMY of ACTUARIES

TRACE
tracking your CE

Once you've logged-in...

The screenshot shows the American Academy of Actuaries website. At the top, there is a navigation bar with categories: CASUALTY, HEALTH, LIFE, PENSION, PROFESSIONALISM, and RISK MNGT & FINANCIAL RPTG. Below this is a search bar and a 'Member log-in' link. The main content area is titled 'Log in' and includes instructions: 'Log in to your member page. From there, you may update your member record, check your dues status or pay dues, register for events, and read any current announcements for members.' There are two input fields: one for the user name (containing 'joe actuary') and one for the password (containing '*****'). A 'Submit' button is located below the password field. To the right of the login form, there are several promotional banners for 'TRACE tracking your CE', 'Contingencies', and 'FUTURE SHOCK'. At the bottom of the page, there are links for 'Search', 'Site index', and 'Contact us'.

Enter your Academy User Name

Enter your Academy Password

Click **SUBMIT**

You're in TRACE!

The screenshot shows the TRACE website interface. At the top, the American Academy of Actuaries logo and name are displayed, along with a navigation menu for various insurance lines: CASUALTY, HEALTH, LIFE, PENSION, PROFESSIONALISM, and RISK MNGT & FINANCIAL RPTG. A search bar and a 'Search' button are present. Below the navigation, a 'Member homepage, Log out' link is visible. The main content area features a personalized welcome message: 'Welcome, Joe Member ID: 73'. Below this, the TRACE logo is shown with the tagline 'tracking your CE'. A paragraph explains that users can view and update their continuing education activities and credits using TRACE. A list of links is provided: 'View tutorial on how to use the tool' and 'Review Qualification Standards'. At the bottom, there are links for 'Search', 'Site index', 'Contact us', and 'Back to top'. The footer contains the American Academy of Actuaries address, contact information, and copyright notice.

Callout 1: Your name and member ID will appear here

Callout 2: View, Enter/Update CE and EA credits

Callout 3: Convenient reference links to the tutorial and Qualification Standards



What You'll See: Quick Tour

Add a
NEW
CE
activity

Generate
a CE
Report

Generate
an EA
Report

Define
your view
by time
range

Summary
of all
your CE
Records

TRACE
tracking your CE

about or need assistance, please contact us for help. For more information on how to use TRACE, please visit our help page. For questions regarding the U.S. CE requirements, please visit our FAQ. If you have additional questions, please contact our support team. For more information, please contact our web manager at trace@aaa-act.org.

Member Name: Joe

[Add a new CE activity](#) [Generate a CE Report](#) [Generate an EA Report](#)

Select CE summaries to view:

Summary of All CE Records for 2009

CE Type	Organized Activities	Other Activities	Total
Area of Existing or New Practice (?)	24.30	0.00	24.30
Professionalism (?)	3.00	0.00	3.00
Specific Qualifications (?)	0.00	3.00	3.00
General Business Courses (?)	5.50	4.20	9.70
Totals	32.80	7.20	40.00

* Minimum CE Requirements (30 hours annually using a 50 minute = 1 CE hour scale)
 * Maximum CE: No more than three general business skills may count towards annual CE.

- Organized Activities: 6 annually
- Professionalism: 3 annually
- Specific Qualification (if applicable): 15 annually
- Other Activities = any other relevant CE as defined under the qualification standards

Records 1 to 20 of 131
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Date	CE Type	CE Credit Hours	EA Type	Description	Location	Organized Activity / Other Activity	Sponsoring Organization	Supporting Notes	Edit	Remove
Nov 11, 2009	P	1.50	Core, NonCore	Code of Conduct-Does the Code Apply To This? Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Jul 08, 2009	P	1.50	Core, NonCore	ABCD & the Disciplinary Process Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove



Add New Sponsored CE Activity

Find CE Offerings (optional)

Year: * Continuing education data entered for pre-2008 events must meet the definitional requirements of the Qualification Standards for Prescribed Statements of Actuarial Opinion effective April 15, 2001 through December 31, 2007 (see http://www.actuary.org/qualstandards/qualif_stnds.pdf)

Sponsor:

Event:

Location:

Keyword:

If an association-sponsored activity, you can use drop-down menus to narrow your search for CE events by year, sponsor, event name, location or keyword search

Find CE Offerings (optional)

Year: * Continuing education data entered for pre-2008 events must meet the definitional requirements of the Qualification Standards for Prescribed Statements of Actuarial Opinion effective April 15, 2001 through December 31, 2007 (see http://www.actuary.org/qualstandards/qualif_stnds.pdf)

Sponsor:

Event:

Location:

Keyword:

Select CE:

Once you've narrowed your search and click "Search for CE," a second menu appears with all events matching that criteria. Select from this list the event you wish to add and it will pre-populate the Add New CE Activity form.



Add a New Non-Sponsored CE and/or EA Activity

CE Information(* = required)

Date (MM/DD/YYYY):

* Organized Activity or Other Activity: **Select Activity Type** 

* CE Type: **Select CE Type**

* CE Credit Hours: * Credit hours shown are those provided by the sponsoring organizations. Determination of actual hours earned and whether any course is relevant to the actuary's area of practice must be made individually by each actuary using reasonable good faith judgment.

* Description:

* Location:

* Country: **US**

* Sponsoring Organization: AAA ASPPA ACOPA CAS CCA CIA SOA Employer Other spons

Supporting notes:

Manually complete the details of the CE activity you wish to create

EA Information (if applicable)

Please be reminded that the Joint Board for the Enrollment of Actuaries ultimately determines what constitutes core and non-core continuing education and the number of continuing education credit hours allocated to same for Enrolled Actuaries. The Academy makes no representations or warranties about compliance with JBEA rules, and the individual actuary is responsible for compliance with the JBEA Regulations and Treasury Department Circular 230 which can be found at <http://www.irs.gov/taxpros/actuaries/article/0..id=97441.00.html>

EA Cycle: **Select CE Cycle** 

EA Category Breakout
* One or more of the below categories have specific computation values based upon based upon those total computation values.

	Core Hours	Non-Core Hours
Participant in formal program and/or correspondence/self-study programs:	<input type="text"/>	<input type="text"/>
Served as instructor, discussion leader, or speaker:	<input type="text"/>	<input type="text"/>
Credit for published articles, books, films, etc:	<input type="text"/>	<input type="text"/>
Service on JB advisory committees or prep of JB exams:	<input type="text"/>	<input type="text"/>
Credit earned by examination:	<input type="text"/>	<input type="text"/>
Total EA Hours:	<input type="text"/>	<input type="text"/>

REMEMBER: EA activities do NOT pre-populate automatically – you must re-enter them



View CE Credits

[Add a new CE activity](#)
[Generate a CE Report](#)
[Generate an EA Report](#)

Select CE summaries to view:

Summary of All CE Records for 2009

CE Type	Organized Activity (?)	Other Activity (?)	Total
Area of Existing or New Practice (?)	24.30	0.00	24.30
Professionalism (?)	3.00	0.00	3.00
Specific Qualifications (?)	0.00	3.00	3.00
General Business Courses (?)			9.70
Totals			40.00

* Minimum CE Requirements (30 hours annually using a 50 minute = 1 CE hour scale)
 * Maximum CE: No more than three general business skills may count towards an

- Organized Activities: 6 annually
- Professionalism: 3 annually
- Specific Qualification (if applicable): 15 annually
- Other Activities = any other relevant CE as defined under the qualification standards

Records 1 to 20 of 131
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Date	CE Type	CE Credit Hours	EA Type	Description	Location	Category	Code	Notes	Edit	Remove
Nov 11, 2009	P	1.50	Core, NonCore	Code of Conduct-Does the Code Apply To This? Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Jul 08, 2009	P	1.50	Core, NonCore	ABCD & the Disciplinary Process Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Mar 09, 2009	A	1.80		Test description	Webcast, US	ORG	AAA,CCA		Edit	Remove
Mar 05, 2009	S	3.00	Core, NonCore	Professional Standards Seminar	Seminar, US	OTH	CCA		Edit	Remove
Mar 03, 2009	A	8.00	Core, NonCore	test	Washington, DC, US	ORG	AAA	test	Edit	Remove

Summarizes CE credits for the current year

Minimum Requirements quick reference

Credit detail by activity entry



Update CE Information

To update an activity, select the EDIT button next to the listing; you'll be prompted to EDIT

Date	CE Type	CE Credit Hours	EA Type	Description	Location	Organized Activity / Other Activity	Sponsoring Organization	Supporting Notes	Edit	Remove
Nov 11, 2009	P	1.50	Core, NonCore	Code of Conduct-Does the Code Apply To This? Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Jul 08, 2009	P	1.50	Core, NonCore	ABCD & the Disciplinary Process Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Mar 09, 2009	A	1.80		Test description	Webcast, US	ORG	AAA,CCA		Edit	Remove
Mar 05, 2009	S	3.00	Core, NonCore	Professional Standards Seminar	Seminar, US	OTH	CCA		Edit	Remove
Mar 03, 2009	A	8.00	Core, NonCore	test	Washington, DC, US	ORG	AAA	test	Edit	Remove
Mar 01, 2009	G	5.50	Core, NonCore	4th Annual Teleunderwriting Seminar	Tampa, US	ORG	AAA,SOA , XYZ	testing	Edit	Remove
Feb 26, 2009	A	4.00	Core, NonCore	test	Washington, DC, US	ORG	AAA,SOA	test	Edit	Remove
Feb 23, 2009	A	4.00	Core, NonCore	adfasdf	Washington, US	ORG	AAA	adfasdf	Edit	Remove
Jan 21, 2009	A	2.00	Core, NonCore	adfasdf	adfasdf, US	ORG	AAA		Edit	Remove
Jan 21, 2009	G	3.00	Core, NonCore	afaf	adfasdf, US	OTH	AAA		Edit	Remove
Jan 14, 2009	A	3.00	Core	New Regs-General Overview & Update Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Jan 13, 2009	A	1.50	Core	Test -- Symposium on Enterprise Risk Management	Chicago, US	ORG	CAS,CIA,SOA	blah	Edit	Remove
Jan 01, 2009	G	1.20		Magazine Reading	Washington, US	OTH			Edit	Remove



Update CE Information

CE Information (* = required)

* Date (MM/DD/YYYY): 03/01/2009

* Organized Activity or Other Activity: Organized Activity

* CE Type: General Business

* CE Credit Hours: 5.5 * Credit hours shown are those provided by the sponsoring organizations. Determination is made individually by each actuary using reasonable good faith judgment.

* Description: 4th Annual Teleunderwriting Seminar

* Location: Tampa

* Country: US

* Sponsoring Organization: AAA ASPPA ACOPA CAS CCA CIA SOA Employer Other sponsors: XYZ

Supporting notes: testing

EA Information (if applicable)

* Please be reminded that the Joint Board for the Enrollment of Actuaries ultimately determines what constitutes core and non-core continuing education and that the Academy makes no representations or warranties about compliance with JBEA rules, and the individual actuary is responsible for compliance with the JBEA rules. http://www.irs.gov/taxpros/actuaries/ce/ce/0_id=97441_00.html

EA Cycle: 2008-2010

EA Category Breakout

* One or more of the below categories have specific computation values based on formulas under the JBEA Regulations for such categories, therefore the user should review the Joint Board rules and input data based upon those total computation values.

	Core Hours	Non-Core Hours
Participant in formal program and/or correspondence/self-study programs:	0.5	0.5
Served as instructor, discussion leader, or speaker:	0.5	0.5
Credit for published articles, books, films, etc:	0.5	0.5
Service on JB advisory committees or prep of JB exams:	0.5	0.5
Credit earned by examination:	1.25	0.25
Total EA Hours:	3.25	2.25

You can return to a CE entry to refine your description of an activity, or...

Detail any supporting materials from the activity that will help you in the future.

REMINDER: EA entries do not auto-populate CE entries.



Remove CE Information

To remove an activity, select the REMOVE button next to the listing; you'll be prompted to confirm the REMOVAL of the activity

Date	CE Type	CE Credit Hours	EA Type	Description	Location	Organized Activity / Other Activity	Sponsoring Organization	Supporting Notes	Edit	Remove
Nov 11, 2009	P	1.50	Core, NonCore	Code of Conduct-Does the Code Apply To This? Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Jul 08, 2009	P	1.50	Core, NonCore	ABCD & the Disciplinary Process Audiocast	Teleconference, US	ORG	AAA,CCA		Edit	Remove
Mar 09, 2009	A	1.80		Test description	Webcast, US	ORG	AAA,CCA		Edit	Remove
Mar 05, 2009	S	3.00	Core, NonCore	Professional Standards Seminar	Seminar, US	OTH	CCA		Edit	Remove
Mar 03, 2009	A	8.00	Core, NonCore	test	Washington, DC, US	ORG	AAA	test	Edit	Remove
Mar 01, 2009	G	5.50	Core, NonCore	4th Annual Teleunderwriting Seminar	Tampa, US	ORG	AAA,SOA, XYZ	testing	Edit	Remove
Feb 26, 2009	A	4.00	Core, NonCore	test	Washington, DC, US	ORG	AAA,SOA	test	Edit	Remove
Feb 23, 2009	A	4.00	Core, NonCore	adfasdf	Washington, US	ORG	AAA	adfadf	Edit	Remove
Jan 21, 2009	A	2.00	Core, NonCore	adfadf	adfadf, US	ORG	AAA		Edit	Remove
Jan 21, 2009	G	3.00	Core, NonCore	afaf	adfadf, US	OTH	AAA		Edit	Remove
Jan 14, 2009	A	3.00	Core	New Regs-General Over			AAA,CCA		Edit	Remove
Jan 13, 2009	A	1.50	Core	Test -- Symposium on En			CAS,CIA,SOA	blah	Edit	Remove
Jan 01, 2009	G	1.20		Magazine Reading					Edit	Remove
Dec 04, 2008	P	1.00		Actuarial Standards of P			AAA,CCA		Edit	Remove
Oct 27, 2008	A	1.50		Session # 15: "You Would Know This" and Other Cocktail Party Conversations for Actuaries	Washington, US	ORG	CCA		Edit	Remove
Oct 27, 2008	P	1.50		Session # 15: "You Would Know This" and Other Cocktail Party Conversations for Actuaries	Washington, US	ORG	CCA		Edit	Remove



Pre-populated data

- ▲ **With the assistance of the U.S.-based actuarial organizations, it's our goal to make this tool as simple to use as possible.**
- ▲ **TRACE will be pre-populated with many of the CE and EA offerings made available to actuaries by the Academy, ASPPA, CAS, CCA and SOA.**



Generate/Export CE Report

You can view all CE /EA activities or generate a report by specifying a certain time period.

Member Name: Joe Actuary

Generate CE Report

Generate CE reports by selecting a specific time period below, or show all CE activity by marking the "Select All CE Data" checkbox. You may export the information to a CSV file and open in Excel by selecting "Export selected CE records."

Select time period for CE data

Start Date (MM/DD/YYYY):

End Date (MM/DD/YYYY):

OR Select All CE Data

CE Type	Organized Activity (?)	Other Activity (?)	Total
Area of Existing or New Practice (?)	49.90	11.70	61.60
Professionalism (?)	23.50	4.00	27.50
Specific Qualifications (?)	5.00	4.25	9.25
Business/Management (?)	8.75	4.95	13.70
Totals	87.15	24.90	112.05

Records 1 to 20 of 48
 << < Previous [Next](#) >>

Date	CE Type	CE Credit Hours	EA Type	Description	Location	Organized Activity / Other Activity	Sponsoring Organization	Supporting Notes
Mar 09, 2009	A	1.80		Test description	Webcast, US	ORG	AAA,CCA	
Mar 05, 2009	S	3.00	Core, NonCore	Professional Standards Seminar	Seminar, US	OTH	CCA	



Generate/Export CE Report

You can also export your report data to a CSV file; open in Excel.

Member Name: Joe Actuary

Generate CE Report

Generate CE reports by selecting a specific time period below, or show all CE activity by marking the "Select All CE Data" checkbox. You may export the information to a CSV file and open in Excel by selecting "Export selected CE records."

Select time period for CE data

Start Date (MM/DD/YYYY): 01/01/2008 End Date (MM/DD/YYYY): 12/31/2008

Submit new dates

OR Select All CE Data

[Export selected CE records](#)

CE Type	Area of Existing or New Practice (?)	Professionalism (?)	Specific Qualifications (?)	Business/Management (?)	Totals
Other Activity (?)					Total
25.45					104.80
15.25					57.50
4.75					9.75
12.70					22.45
58.15					194.50

File Download

Do you want to open or save this file?

Name: CE.csv
Type: Microsoft Excel Worksheet
From: www.232.safesecureweb.com

Open Save Cancel

Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file.

Date	CE Type	CE Credit Hours	EA Type	Description	Organized Activity / Other Activity	Sponsoring Organization	Supporting Notes
Nov 11, 2009	P	1.50	Core, NonCore	Code of Ethics	Teleconference, US	AAA,CCA	
Jul 08, 2009	P	1.50	Core, NonCore	ABCD & the Disciplinary Process Audiocast	Teleconference, US	AAA,CCA	
Mar 09, 2009	A	1.80		Test description	Webcast, US	AAA,CCA	



Generate EA Report

The Generate/Export EA Report page allows viewing of EA activities by reporting cycle; both core and non-core activities

Member Name: Joe Actuary

[Add a new CE activity](#) [Generate a CE Record](#) [Generate an EA Report](#)

Select CE summaries to view: Current year

Summary of All CE Records for 2009

CE Type
Area of Existing or New Practice (?)
Professionalism (?)

Member Name: Joe Actuary

Generate EA Report

Generate EA reports by specifying the EA reporting cycle below. You may export the information to a CSV file and open in Excel by selecting "Export selected EA records."

Select EA Cycle: 2008-2010

Summary of EA Cycle:

EA Category	Core hours (C)	Non-core hours (N)	Total
Participant in formal program and/or correspondence/self-study programs	5.15	3.80	8.95
Served as instructor, discussion leader, or speaker	9.35	4.75	14.10
Credit for published articles, books, films, etc	5.35	6.00	11.35
Service on JB advisory committees or prep of JB exams	5.35	7.10	12.45
Credit earned by examination	5.50	3.10	8.60
Total	30.20	24.75	54.95

[Export selected EA records](#)

Records 1 to 15 of 15

Date	EA Cycle	EA Core Hours	EA Non-Core Hours	Description	Location	Sponsoring Organization	Supporting Notes
Nov 11, 2009	2008-2010	0.50	0.75	Code of Conduct-Does the Code Apply To This? Audiocast	Teleconference, US	AAA,CCA	
Jul 08, 2009	2008-2010	0.75	0.75	ABCD & the Disciplinary Process Audiocast	Teleconference, US	AAA,CCA	
Mar 05, 2009	2008-2010	2.00	1.00	Professional Standards Seminar	Seminar, US	CCA	



Export EA Report

You can export your EA data to a CSV file and open in Excel.

Member Name: Joe Actuary

Generate EA Report

Generate EA reports by specifying the EA reporting cycle below. You may export the information to a CSV file and open in Excel by selecting "Export selected EA records."

Select EA Cycle: 2008-2010

Summary of EA Cycle:

EA Category	Core hours (C)	Non-core hours (N)	Total
Participant in formal program and/or correspondence/self-study programs	5.15	3.80	8.95
Served as instructor, discussion leader, or speaker	9.35	4.75	14.10
Credit for published articles, books, films, etc	5.35	6.00	11.35
Service on JB advisory committees or prep of JB exams			12.45
Credit earned by examination			8.60
Total			54.95

[Export selected EA records](#)

File Download

Do you want to open or save this file?

Name: EA.csv
Type: Microsoft Excel Worksheet
From: www232.safesecureweb.com

Open Save Cancel

Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file.

Date	EA Cycle	EA Core Hours	EA Non-Core Hours	Sponsoring Organization	Supporting Notes
Nov 11, 2009	2008-2010	0.50	0.75	AAA, CCA	
Jul 08, 2009	2008-2010	0.75	0.75	AAA, CCA	
Mar 05, 2009	2008-2010	2.00	1.00	CCA	
Mar 03, 2009	2008-2010	6.00	2.00	AAA	test
Mar 01, 2009	2008-2010	3.25	2.25	AAA, SOA, XYZ	testing
Feb 26, 2009	2008-2010	2.00	2.00	AAA, SOA	test
Feb 23, 2009	2008-2010	2.00	2.00	AAA	adfadf
Jan 21, 2009	2008-2010	1.50	1.50	AAA	



TRACE was designed with the profession's Qualification Standards in mind

- ▲ **While TRACE provides the appropriate fields for entering activities, accurate self-reporting and data accuracy is still the responsibility of the actuary.**



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