

Training & Coaching Record Retention Policy

TRAINING RECORD RETENTION POLICY.

Clay Phillips Mediation & Training retains training records for five (5) years unless otherwise required by law or policies or standards of a customer organization, professional association, or continuing education regulatory agency/authority.

Specific documentation typically retained by Clay Phillips Mediation & Training includes but is not limited to:

- Records of participation
- Dates and locations of program offerings
- Author/instructor, author/developer and reviewer names and credentials. For the CPA and tax attorney acting as an author/instructor, author/developer and reviewer for accounting, auditing or tax program(s), the state of licensure, license number and status of license should be maintained. For the enrolled agent acting in such capacity for tax program(s), information regarding the enrolled agent number should be maintained.
- Number of CPE credits earned by participants
- Results of program evaluations
- Program descriptive materials (course announcement information)

Our Training Records Retention Policy specifically complies with:

- The Tennessee Commission for Continuing Legal Education and Specialization
- Tennessee Supreme Court Alternative Dispute Resolution Commission
- Society for Human Resource Management
- The Standards for Continuing Professional Education (CPE) Programs approved and incorporated by NASBA and AICPA (Revised August 2016)