



## CBA LIVE 2020 Virtual Internal Audit Forum

### Session 6: Managing Expectations: Internal Audit Considerations for Telework and Return to Work

October 1, 2020 2:00 – 2:55 pm ET

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\*CPE POLICY

#### Session 6 CPE Information

- \* Knowledge Level: Basic
- \* Prerequisite Education, Experience or Advance Preparation: None
- \* Field of Study: Auditing, 1.0 Credit
- \* Instruction Delivery Method: Group Internet Based
- \* Program Description and Learning Objectives:

After the COVID-19 seclusions and increasing numbers of employees working remotely, many are left wondering: “Will the workplace ever return to normal?” In some ways, probably not, requiring preparation for a new normal regardless of how long the health risks remain. As the shift to telework becomes the new way of life, managing expectations is key.

In this session you will learn:

- \* Effective strategies for implementing a successful remote working environment;
- \* Perspectives of new employees as they enter the remote environment and insights on what can make their transition easier; and
- \* Advice on what to expect when employees return to working in the office and what to expect.

\* Speaker(s):

- \* Louise OConnell, Woodforest National Bank
- \* Nikki Jackson, Woodforest National Bank
- \* Timothy Lane, Rockland Trust Company
- \* Catharine Dutt, RSM
- \* Jim Tarantino, RSM

\* Attendees that satisfy participation requirements for this session (see procedures below) are eligible to receive 1.0 CPE credit for this session. In accordance with the standards of the National Registry of CPE Sponsors, credit is granted based on a 50 minute hour.

## Procedures for Requesting CPE Credit

CBA can only offer CPE credits to attendees that participate in group internet based programs delivered in real time during CBA LIVE's virtual event. Accordingly, although CBA will permit conference attendees to view previously recorded sessions "on-demand" for 30 days after the conference, CBA cannot issue CPE credits to individuals that view the session "on-demand" if these individuals do not evidence prior participation in the group internet based program delivered in real time. For individuals viewing the session in real-time, the speakers will announce three digit codes 3 times at random times throughout the presentation. Please write these codes down and, at the end of the session, promptly email the codes to Kevin O'Connor at [koconnor@consumerbankers.com](mailto:koconnor@consumerbankers.com) no later than 30 minutes after the conclusion of real-time programming to evidence your participation and attendance.

Please note, if you do not timely submit codes for each session before the announced deadline, or you submit incomplete or incorrect codes, you may not be eligible to receive CPE credit. No later than 60 days after the conference, CBA will send CPE certificates by email to attendees who satisfied participation and attendance for each CPE eligible session viewed live and in real-time.

CBA will retain records of attendee participation but is not obligated to submit any documentation relative to participation on behalf of attendees. Each attendee is responsible for submitting their CPE certificates to their respective licensing jurisdictions. Evaluation forms will be sent to attendees when CPE certificates are emailed and can also be completed by accessing the following link: <https://www.surveymonkey.com/r/BMV82S8>. CBA representatives will be available during each session to assist with questions regarding CPE credits.

## Conference Registration/Refund/Cancellation Policy

Interested parties can register for the conference online at <https://www.consumerbankers.com/cba-live/cba-live-2020-registration>. Registered attendees will receive virtual conference credentials by email at the address supplied during registration which allow attendees to attend any program at CBA LIVE. While attendees do not need to register for CPE eligible sessions, attendees seeking CPE must satisfy the Procedures for Requesting CPE Credit set forth above. To cancel your registration, email [cbaliveregister@consumerbankers.com](mailto:cbaliveregister@consumerbankers.com). To receive a full refund, you must cancel by September 27, 2020. You may transfer your registration to another person at no cost at any time.

## Questions about CPE Credits

For more information regarding policies, cancellations, refunds or other concerns, or to register a complaint, please contact Jenna Burke at [jburke@consumerbankers.com](mailto:jburke@consumerbankers.com).

## CPE Eligible Sessions Offered at CBA LIVE 2020 Virtual

- \* The Future Focus of Internal Audit
- \* Embracing the New Normal: Internal Audit Operational Response to COVID-19
- \* CARES Act Auditing- What Every Internal Auditor Needs to Know

The Consumer Bankers Association is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

- \* PPP From the Auditor's Point of View
- \* Board Matters: Audit Committee Perspectives on the Internal Audit Function
- \* Managing Expectations: Internal Audit Considerations for Telework and Return to Work

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