

## FACT SHEET

# Training Signup and Pricing Policy

**Scope of Policy**

These policies apply to the instruction of standard OneStream training materials for public training classes. These policies apply to private training, which also requires a mutually signed Statement of Work outlining the specific training terms. OneStream reserves the right to change this policy at a future date.

**Prerequisites and Advanced Preparation**

All training participants must be a current OneStream customer or partner at the time of course registration in accordance with Section 1 of the Training Terms and Conditions (the "Terms"). OneStream may choose to cancel any training registration that does not meet the registration requirements in Section 1 of the Terms. In such event, a refund will be given for the training class amount; OneStream is not responsible for any additional costs accrued by the individual.

Attendance to classes is conditional based on meeting the prerequisites for those classes. OneStream assures program content and program levels are appropriate for the intended participants assuming all course prerequisites have been met. Some advanced courses may contain a pre-assessment. It is suggested users pass the pre-assessment with a 70% or higher passing grade before attending the class. Please see individual class agendas for detailed prerequisites and advanced preparation requirements.

**Delivery**

All OneStream classes are delivered live instructor-led (Group-Live); however, a Live Remote option (Group-Internet Based) and on-demand (QAS Self-Study) option are available for many, but not all classes. Classes may contain interactive materials, sample files, instructional slides, and exercise guides. Students are required to provide their own laptops unless otherwise notified.

**Class Listing, Information, and Other Policies**

Refer to [www.onestream.com/training](http://www.onestream.com/training) for the following information:

- Class descriptions, agendas, rates, and schedules
- Training locations with directions and hotel recommendations
- Class registration, cancellation, and payment policies

Questions or complaints should be directed the Training Support Team by submitting a case form on the [ServiceNow Support Portal](#).

**Class Location**

The posted schedule will display each class location or time zone if virtual.

Refer to [www.onestream.com/training](http://www.onestream.com/training) for directions, recommended hotel accommodations, class hours, and other information.

**Signup and Payment**

Training registration and payment are completed through our online registration system. Payments are made by credit card or wire transfer.

## Credit Card Payments

All credit card payments are made through the third-party online registration system. Upon completing registration, a training confirmation and receipt are sent to the email address used to register.

## Wire Payments

Wire payment information and bank details are available in the online registration system when selecting this payment method. Upon completing registration, an invoice is sent to the email address used to register. Training invoices must be paid before the first day of training. Failure to do so may result in the cancellation of the registration.

## Pricing

All pricing is exclusive of applicable taxes, travel, and related expenses. Public classes are charged at a rate per student per class. Class instances are offered in differing currencies, and invoices will reflect the currency in which the course is being offered. OneStream cannot change the currency of an invoice.

Refer to the training schedule at [www.onestream.com/training](http://www.onestream.com/training) for the most recent class rates. OneStream Software reserves the right to change any public class rate.

## Class Size

Public classes require a minimum of four students registered within seven days of the class start date, or the class may be canceled at OneStream's discretion. Students will be notified via email if a cancellation should occur. Any registered students will receive a full refund or be rescheduled to a later class date of their choice. Once the registered class size reaches its limit (differs by location), it will be closed to additional students. OneStream is not responsible for any travel expenses incurred due to a cancellation made by the student or by OneStream.

### Student Cancellation

Please refer to the cancellation schedule listed below. If you cannot attend a training class, you are permitted to send another employee from your company at no additional charge.

All cancellations, substitutions and modifications are completed via our online registration system.

### Cancellation Schedule

#### 14 or More Days

No charge; full refund

#### 13 to 7 Days

50% of fee charged

#### Under 7 Days

Full fees charged; no refund

## Training Materials and Training Environment

All OneStream classes include temporary access to a OneStream training server environment, including remote connection and security credentials. This information is to be treated as confidential and not shared with any other party.

Companies are not permitted to provide training to other companies and customers on OneStream products using OneStream-created materials without written permission from OneStream Software.

Access to On-Demand courses purchased a la carte is granted for 90 days from the date of redemption. Access to On-Demand courses purchased via OneStream

Navigator Passport is granted for 365 days. Students must complete any qualified assessments before access expires.

OneStream provides End User Training Pack starter kits, which cover a particular implementation of OneStream free of charge via the OneStream MarketPlace. OneStream customers and partners are welcome to modify these materials in order to fit their needs.

Course materials are reviewed on a yearly basis to ensure content is up-to-date and technically accurate. Members of the development team complete the review of the content in conjunction with subject matter experts outside of the development team. Updates to course content may differ based on platform releases.

## Record Retention

OneStream retains all items as required by NASBA for a minimum of five years. This retention includes the following:

- 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).

## Continuing Professional Education Credits

OneStream Software is registered with the National Association of State Boards 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 at: [www.NASBARegistry.org](http://www.NASBARegistry.org).



Up to 40 CPE Credits are available for attending certain courses in the areas of Information Technology and Finance. The number of credits depends on the length of the class.