

NASBA Requirements:

Program: Each session needs to provide the following elements-(ON WEBSITE)	
Learning Objectives Specifications on what participants should accomplish in a learning activity, such as the knowledge, skill or ability. Learning objectives should be clearly stated. Learning Objectives: State the knowledge, Skills and Abilities that can be achieved by participants in the learning activities	
Description Materials could be a detailed agenda or a range of topics that will be covered; Description for each Session receiving - Does the program content and program knowledge level of your courses equate to the background of your intended audience? Knowledge levels consist of basic, intermediate, advanced, update and overview.	
	Basic. Program knowledge level most beneficial to CPAs new to a skill or an attribute. These individuals are often at the staff or entry level in organizations, although such programs may also benefit a seasoned professional with limited exposure to the area. Intermediate. Program knowledge level that builds on a basic program and is most appropriate for CPAs with detailed knowledge in a particular topic. Such persons are often at a mid-level within the organization, with operational or supervisory responsibilities, or both. Advanced. Program knowledge level most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications. Advanced level programs are often appropriate for seasoned professionals within organizations; however, they may also be beneficial for other professionals with specialized knowledge in a subject area. Overview. Program knowledge level that provides a general review of a subject area from a broad perspective. These programs may be appropriate for professionals at all organizational levels Update. Program knowledge level that provides a general review of new developments. This level is for participants with a background in the subject area who desire to keep current.
Program Knowledge Level Program knowledge levels are Basic, Intermediate, Advanced, Overview, or Update.	
Field of Study Even if the program agenda is not completely finalized at the time the promotional materials are shared with participants, provide the recommended Field(s) of Study using NASBA's Field of Study subject area classifications. Field Of Study - All Sessions need to be classified based on NASBA's Fields of Study subject areas: NASBA's Fields of Study curriculum represents the primary knowledge and skill areas needed by accounting licensees to perform professional services in all fields of employment.	https://www.nasbaregistry.org/_media/Documents/2019-standards-and-fos/Fields-of-Study-Documents---December-2019.pdf
Accounting or Auditing Programs: The participation of at least one licensed CPA (in good standing and holding an active license or the equivalent of an "active" license in a U.S. jurisdiction) is required in the development of every program in accounting and auditing.	If you choose Accounting or Auditing as the Field of study, there must be information provided that the content was developed by at least one licensed CPA; please forward this to me (Kati).
Prerequisites All programs must clearly identify prerequisite education, experience, in precise language so that potential participants can readily ascertain whether they qualify for the program. Note: Program knowledge levels of intermediate, advanced or update inherently have a prerequisite education or experience. If Basic or Overview - Prerequisite and Advanced work: List as NONE	

LISTED ON THE WEBSITE OR PROGRAM

Program Registration Requirements

Provide clear instruction on how a participant can register for the program & attendance requirements

Refund Policy for Courses Sold for a Fee/Cancellation Policy

Must be clearly stated with appropriate contact information so that a participant can obtain the necessary information. If a program is being offered free of charge, the statement still needs to be present. A recommended solution would be: "Due to this program being offered free of charge, there will be no refunds issued."

Complain Resolution Policy

For more information regarding refund, complaint, and/or program cancellation policies please contact Chea Smith, with a phone and email included

Official Registry Statement

The language must be in its entirety and without alteration.

The National Council of University Research Administrators 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: www.nasbaregistry.org.

Taxes Programs:

Was a CPA, tax attorney or an IRS enrolled agent, in good standing and holding an active license, involved in the development of the program? The participation of at least one licensed CPA, tax attorney, or IRS enrolled agent (in good standing and holding an active license or the equivalent of an "active" license in a U.S. jurisdiction) is required in the development of each program in the field of study of taxes. In the case of the subject matter of international taxes, the participation of the equivalent of an "active" licensed CPA for the international jurisdiction involved is permitted.

Advanced Preparation

The promotional material should clearly state the advanced preparation that is appropriate for the participants. Examples include, but are not limited to: books, articles, journals, or workbooks to be read/completed prior to attending the program. If there is no advanced preparation required, state "Advance Preparation: None".

Type of Delivery Method/Instructional Delivery Methods

The promotional material should clearly state the delivery method using the common language: **Group Live**, Group Internet Based or QAS Self Study.

Amount of Recommended CPE Credit

If multiple sessions are held within a program (as with a conference), list the maximum potential CPE credits a participant could be awarded if they attend all sessions possible.

Calculate: One 50-minute period is equal to one CPE credit. A Minimum of 1 credit must be awarded initially, but after the first credit has been earned, credits may be awarded in one-fifth increments or in one-half increments (1.0, x.2, x.4, x.5, x.6, x.8) Sponsors may round down CPE Credits awarded to the nearest one-fifth, one-half or whole credit at their discretion, as appropriate for the instructional delivery method.

<http://www.nasbaregistry.org/registry-forms--policies/sample-templates>

Evaluations

NASBA requires an evaluation be sent out following the meeting that contains the following survey questions:

Stated learning objectives were met

Stated prerequisite requirements were appropriate and sufficient
If your program has no prerequisite, you still need to have this question on your evaluation form to allow the participant to provide feedback if they believed prerequisite education or experience was needed.

Program materials were relevant and contributed to the achievement of the learning objectives

Time allotted to the learning activity was appropriate

Individual instructors were effective

If you only offer self study or nano learning programs, this question is not applicable to you. <http://www.nasbaregistry.org/registry-forms--policies/sample-templates>

ONSITE:

Have a sign in sheet daily that each participant is required to sign. You need a separate sign in sheet daily, with the following on the head of each sheet.

Ask that you provide this back to us via email once you return to the office:

Name of Org

Program Title

Program location and date

Day/date