

NASBA

Top 5 Helpful Hints for National Registry Main Contacts (2026 Standards Version)

1. Understand the Foundation of Your Membership

National Registry approval is granted at the organization level and is based on the learning format(s) and program offering level approved as part of your Registry membership.

Once approved, you may add new program offerings within your approved scope without submitting additional materials, provided the programs comply with the Statement on Standards for CPE Programs and all required documentation is maintained.

If your organization exceeds its approved program offering level, contact your National Registry Account Manager to discuss available options.

2. Maintain Complete Program Records

As the main contact, you are responsible for maintaining records for all programs that offer NASBA-approved CPE credit.

At a minimum, your program records should include:

- Program title
- Program format
- Date(s) offered
- Total CPE credits
- Credit by field of study

You should also maintain documentation supporting compliance with the Standards, including program materials, learning objectives, completion verification records, participant engagement records (when applicable), program evaluations, and other required documentation.

Maintaining organized records throughout the year will make renewals, audits, and compliance reviews significantly easier.

3. Support Participant Engagement and Completion Verification

A key goal of the 2026 Standards is ensuring that participants actively engage with learning activities and that sponsors can verify completion of CPE programs.

Sponsors should have documented processes that:

- Encourage participant engagement throughout the learning activity
- Verify completion before awarding CPE credit
- Support the amount of CPE credit awarded

For live and virtual learning activities, participant engagement should be incorporated into the learning experience through appropriate instructional strategies and documented procedures.

Main contacts should regularly review their organization's policies and ensure staff consistently follow them.

4. Expanding Into Additional Learning Formats

If your organization wants to offer CPE through an additional format not currently approved as part of your Registry membership, you must complete the National Registry's approval process before awarding CPE credit.

To begin the process:

1. Complete the interest form through the Apply Now section of the National Registry website.
2. Work with your Account Manager to determine the appropriate application.
3. Submit the required program materials and supporting documentation for review.

Approval of an additional learning format becomes part of your existing Registry membership and does not change your renewal date.

5. Stay Current with Registry and Standards Requirements

As the main contact, you are responsible for staying informed about:

- National Registry requirements
- Updates to the Statement on Standards for CPE Programs
- Renewal deadlines
- Registry communications and announcements

To ensure you receive important updates:

- Keep main and supervisory contact information current.
- Ensure emails from **cpe@nasba.org** are not blocked by your organization's email security settings.
- Review resources available through the National Registry website.
- Contact your Account Manager with questions regarding compliance or membership requirements.

Quick Tip

The most successful sponsors maintain complete records, document engagement and completion verification procedures, regularly review their compliance practices, and communicate with their Account Manager whenever questions arise.



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