



Pilot Testing Instructions & Template

The Pilot Testing methodology is one permitted method for determining the recommended CPE credit for QAS™ Self-Study and for the asynchronous portion of Blended Learning formal learning program/delivery methods. When this methodology is used, information is required for submission in the application regarding the pilot testers' qualifications. This documentation satisfies the requirements of [Section 7, Paragraphs 7.02-7.02.4](#) and is meant to establish the total time (in minutes) that each pilot tester took to complete the course and to confirm that the pilot testers' knowledge levels match that of the course content being reviewed. This documentation must be submitted for each individual who acts as a pilot tester for a program. Please see below for more information and guidelines regarding pilot tester documentation.

*Formal learning programs under the [2026 Standards](#) are group programs, self study programs, or blended learning programs. For purposes of this application, the Registry uses "delivery method" to refer to the formal learning program type, including any applicable sub-delivery method such as Nano Learning or QAS Self Study, for which the organization is seeking approval and must demonstrate compliance with the applicable Standards.

Pilot Testing Guidelines ([Section 7, Paragraphs 7.02.1, 7.02.2, 7.02.3](#))

- **Traditional** QAS™ Self-Study & Blended Learning Programs:
 - Must include at least 3 pilot testers
- **Adaptive** QAS™ Self-Study Programs:
 - Must include at least 7 pilot testers
- Pilot testers should be representative of the intended participant population and possess the appropriate level of knowledge for the program before taking the program. For example, it would not be compliant to have pilot testers who hold an advanced knowledge level of the course content for a course which has a program knowledge level of basic. Pilot testers with significantly more advanced knowledge may complete the course faster than the intended audience, which could affect the representative completion time used to determine CPE credit.
- The pilot testers must be independent of the course development team.
- The pilot testers must not be informed about the length of time the program is expected to take to complete.
- If the results of pilot testing are inconsistent and there are large discrepancies between the completion times, then the sample must be expanded or, if the inconsistent results are outliers, the inconsistent results must be eliminated.



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- [Section 7, Paragraph 7.02.1](#) states that when the target audience includes CPAs, the sample group must be licensed CPAs in good standing, hold an active CPA license or equivalent in a U.S. jurisdiction, and possess the appropriate level of knowledge. When the target audience includes both CPAs and non-CPAs, the sample group must be representative and contain both CPAs and non-CPAs.
- [Section 7.02.2](#) requires further pilot tests if substantive changes are made to program materials.
- Please see [Section 7, Paragraph 7.02.3](#) for information regarding the requirement for re-pilot testing.
- Please see [Section 7, Paragraph 7.02.4](#) for more information regarding requirements when pilot testing when the course is purchased from a vendor or other developer.
- Completion time includes time spent taking the qualified assessment. Completion time does not include time spent completing a course evaluation or pre-program assessment.
- Pilot testing records should include: date of pilot test; intended participant population; selection method; pilot tester names, credentials, and relevant experience; CPA state of licensure, license number, and license status, when applicable; actual completion time for each pilot tester; summary of completion times; confirmation that each tester was independent from the course development group; and confirmation that each tester was not informed in advance of the expected completion time.



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Calculation Steps:

1. The completion times for each pilot tester are added together to find the sum.
2. The sum is then divided by the number of testers
3. Divide the answer from step 2 by 50 to determine the CPE credit for that portion of the course.

Example (Traditional QAS™ Self-Study and Blended Learning Programs):

Pilot Tester 1	65
Pilot Tester 2	50
Pilot Tester 3	55
Calculation Steps	<ol style="list-style-type: none"> 1. <u>Total Minutes Combined</u>= 65 + 50 + 55= 170 2. <u>Total Minutes Divided by the # of Testers</u>= 170/3= 56.66 3. <u>Previous Total Divided by 50</u>= 56.66/50= 1.13 CPE
Rounded down to the nearest one-fifth, half or whole credit= 1.0 CPE	

Example (Adaptive QAS™ Self-Study Programs):

	Completion Time in Minutes
Pilot Tester 1	65
Pilot Tester 2	50
Pilot Tester 3	55
Pilot Tester 4	55
Pilot Tester 5	58
Pilot Tester 6	62
Pilot Tester 7	65
Calculation Steps	<ol style="list-style-type: none"> 1. <u>Total Minutes Combined</u>= 65 + 50 + 55 + 55 + 58 + 62 + 65= 410 2. <u>Total Minutes Divided by the # of Testers</u>= 410/7= 58.6 3. <u>Previous Total Divided by 50</u>= 58.6/50= 1.17 CPE
Rounded down to the nearest one-fifth, half or whole credit= 1.0 CPE	

**Please see page 4 for a Pilot Testing Form Template that can be used for QAS™ Self Study and Blended Learning programs.

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Pilot Testing Form

Each individual participating in the pilot test should complete this form.

Sponsor/Organization Name: _____

Course Name: _____

Pilot Tester's Name: _____

Pilot Tester's knowledge or expertise in this subject area:

1. Extensive

2. Above Average

3. Average

4. Little

5. None

Total Time, in minutes, it took the Pilot Tester to complete this course: _____

Date/Time Start: _____

Date/Time End: _____

Date/Time Start: _____

Date/Time End: _____

Date/Time Start: _____

Date/Time End: _____

Date/Time Start: _____

Date/Time End: _____

Date/Time Start: _____

Date/Time End: _____

By signing my name below, I state that I am independent of the group that developed this particular course. The sponsor did not notify me in advance of the proposed completion time. I am also including a one-page resume which supports my qualifications for selection as a participant in the pilot testing for this course.

CPA License Number: _____

State License Number: _____

License Status: _____

Telephone Number: _____

Signature: _____

Printed/Typed Name: _____

Date: _____