Webinar Series Zoom Q&A

"2024 to 2026 Standards: Crossing the Bridge Together: Session 1"

Group Delivery Method

This document contains general questions which were asked during the NASBA Registry's recent webinar series titled, "2024 to 2026 Standards: Crossing the Bridge Together Session 1." Some questions were similar in nature but worded slightly differently. In this scenario, the questions have been merged, and the answers have been summarized into one combined question/answer. Questions are in black, bolded text while the answers appear beneath in blue.

If a question your organization submitted is not within this document, please reach out to us at cpe@nasba.org to speak with your account manager regarding your specific inquiry.

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General Questions

1. What is the hybrid group program?

Group programs under the 2026 Standards can be offered in person, online or in a hybrid setting. In a hybrid setting, participants can attend both in person and online simultaneously.

2. What if it is not an internal information need, but rather for a State board's need to see virtual and in person distinguished? What's the advice here if a NASBA compliance "Group" certificate of completion isn't sufficient for a State board?

Using Group (Group Live) and/or Group (Group Internet Based) format is acceptable especially during the transition period. For consistency and ease of transition across the profession—including CPAs, boards of accountancy, and CPE sponsors—NASBA recommends using the same formal learning program terminology across certificates, promotional materials, and course documentation.

3. Would it be acceptable for sponsors to continue to use "Group Live" or "Group Internet-Based"? What about "Group - Group Live" and "Group - Group Internet-Based"? What is recommended?

For consistency and ease of transition across the profession—including CPAs, boards of accountancy, and CPE sponsors—NASBA recommends using the same formal learning program terminology across certificates, promotional materials, and course documentation. For internal course documentation and promotional materials where "Group Live" and "Group Internet Based" are already[ES1.1] programmed into core systems, those terms may continue to be used without parentheses, provided the delivery method is clear and participants can assess the course's appropriateness and applicability. However, consistent terminology remains NASBA's preferred approach, and sponsors should update systems when reasonably practicable. Having location also helps with ensuring the boards understand that the program is live or virtual.

4. Should sponsors still list the location for group programs on the descriptive/promotional materials and the certificate of completion?

For certificates of completion, Standard 9.01 requires the location to be included when applicable. For Group programs, identifying whether the program was offered at a physical location, online, or in a hybrid format is recommended to clearly communicate how the program was delivered. For a hybrid program, including both the physical and online location provides clarity to participants and boards of accountancy.

5. **Will participants need to state their intended delivery plan for Group applications (i.e., the program submitted for review will be in-person only, virtual only, or both)? Or will we review all programs as if they are both?**

For National Registry application and review purposes, the sponsor should identify whether the Group program will be delivered in person, virtually, or in a hybrid format. The review should be based on the delivery format represented in the submission. If the program will be delivered in both formats, the sponsor should provide enough information to demonstrate that attendance monitoring, engagement, technology/facility considerations, participant communications, and documentation requirements will be met for each format.

6. **Does the combined Group category make the requirements more strict, less strict, or flexible? It was more clear what was required when the types of events were considered separately.**

The 2026 Standards combine in-person and synchronous online programs under the broader “Group program” category. This creates a more unified framework, but the applicable compliance expectations still depend on how the program is delivered.

For example, an in-person group program should have records that support participant identity, attendance duration, real-time monitoring, and any attendance variances. A synchronous online program should also have records that support participant identity and attendance duration. When technology-delivered attendance prompts or verification mechanisms are used, they must occur at least three times per 50-minute CPE credit and must lack predictability.

All group programs generally must also include content-related participant engagement during each full CPE credit, unless a limited exception applies and the sponsor documents the justification.

Accordingly, the combined Group category is not necessarily stricter or less strict overall. It is intended to provide a consistent framework while allowing sponsors to use monitoring, engagement, and documentation methods appropriate to the actual delivery format.

7. What is the difference between Participant Engagement and Completion Verification?

Participant Engagement and Completion Verification are separate requirements.

Participant Engagement refers to activities built into a program to enhance learning through active participant involvement. A group program generally must include content-related participant engagement during each full CPE credit. In limited circumstances, such as certain keynote sessions, the sponsor may omit the engagement element if it documents the justification. These activities should be documented in course materials (e.g., slide decks, agendas, instructor scripts, or other instructional materials). Documentation of Participant Engagement does not necessarily need to be maintained for each attendee, unless this element is also being used to satisfy the completion verification requirements.

Completion Verification refers to the method used to determine a participant's eligibility to receive CPE credit. Completion Verification may be either:

- Technology-based, such as poll questions, QR codes, keywords/codes, attendance prompts, or similar mechanisms. When technology-delivered attendance prompts or verification mechanisms are used, at least three must occur per 50-minute CPE credit and they must lack predictability. Before the program begins, the sponsor must tell participants how many prompts will be presented and how many must be answered to earn full credit.
- Nontechnology-based, such as verified attendance logs, real-time monitoring, or other methods that confirm participant identity and attendance duration.

Completion Verification records must be maintained for each attendee.

If content-related poll questions are used as a technology-based Completion Verification method, they may also satisfy the Participant Engagement requirement. In this case, the poll responses should be retained as Completion Verification records for each attendee.

However, if Completion Verification is achieved through:

- Nontechnology-based methods, or
- Technology-based methods that are not content-related polling questions,

then a separate Participant Engagement activity is still required for each CPE credit hour.

8. I am currently approved for GL *or* GIB and planned to apply for an ADM in the other this year. Now that the new Standards are in effect, how should I go about this?

Under the 2026 Standards, the former Group Live and Group Internet Based delivery methods are incorporated into the new Group delivery method. For National Registry transition purposes, sponsors currently approved for either of the former group delivery methods would not need to apply for the other as an additional delivery method.

A sponsor should transition to the new Group delivery method once all of its former Group Live, Group Internet Based, and newly developed Group programs are ready to comply with the applicable 2026 Standards. This means the sponsor should review its group program processes and materials before transitioning, including participant engagement, attendance monitoring, CPE credit measurement, participant communications, evaluations, and required documentation.

Until the sponsor is prepared to administer all applicable Group programs under the 2026 requirements, it should remain under its existing approved delivery method structure. Once the transition is completed, both in-person and internet-based synchronous programs would be offered under the single Group delivery method.

9. Standard 4.04.2 says sponsors "must periodically review evaluation results." Does NASBA define "periodically," or is the cadence left to the sponsor's discretion? For a high-volume sponsor running 100+ courses a year, would a per-course review, a quarterly review, or an annual portfolio review all be acceptable?

The Standards do not define what “periodically” constitutes. This is up to the sponsor’s discretion. Best practices would indicate a review at least quarterly.

10. Will there be a cost reduction for group programs under the 2026 Standards?

The fee structure based on the number of programs offered annually remains unchanged. However, under the prior delivery methods, a course offered both as Group Live and Group Internet Based was counted as two separate programs for purposes of determining the sponsor’s annual program level. Because those delivery methods have now been combined into a single Group delivery method, the same course offered both in person and online would be counted as one Group program. As a result, some sponsors may have a lower total number of programs offered annually and could fall within a different program level.

11. How do I know if a question is content-based/related to course content?

A question is content-related when it has a meaningful connection to the subject matter being presented. It does not necessarily need to have a correct answer or formally assess achievement of a learning objective. For example, a question asking participants to consider how a concept applies in practice may be content-related, while ‘Are you still here?’ would not be

12. Does "content based" mean that they assess learning? Or does a poll question that is related to the topic but doesn't have a right or wrong answer still count as content based?

A content-related participant engagement activity does not have to formally assess learning or have a right or wrong answer. It must, however, relate meaningfully to the course content. For example, an opinion, application, or reflection poll tied to the subject being taught may qualify as participant engagement.

Participant Engagement

1. **Where are the participant engagement requirements outlined in the Standards?**

Section 5 of the 2026 Standards outlines these requirements.

2. **How is a case study different from a simulation?**

A case study is usually more of an analysis of a past event or real-life scenario. Simulations are typically more interactive with real-time feedback. A case study is usually more of an analysis of a past event or real-life scenario. Simulations are typically more interactive with real-time feedback. Both case studies and simulations may qualify as participant-engagement methods when they are related to the course content and appropriately incorporated into the program. The label used is less important than the design and educational purpose of the activity.

3. **Do participants have to complete all participant engagement to earn full CPE credit?**

It is not required to track individual participant responses unless those measures are also used to satisfy the completion verification measures.

4. **Will a Q&A meet the participant engagement requirements?**

Yes, Q&A components count as Participant Engagement.

5. **Do we need to maintain evidence of participant engagement in QA and who asked each question?**

No, for Participant Engagement, induvial responses do not need to documented.

6. **Can you provide some examples of participant engagement?**

There are some examples given within Section 5 of the Standards, but that is not an exhaustive list. If your organization comes up with a different idea for participant engagement, you are not necessarily limited there. It would just need to be course content based.

7. **What participant engagement documentation must be maintained? Is it enough to keep copies of handouts, reflection periods, or case studies enough?**

Sponsors must maintain documentation of participant engagement. Group CPE program sponsors must retain the program outline, agenda, speaker notes or other documentation that evidences the participant engagement related to 23 course content during each credit of CPE planned for the group program. In certain limited circumstances, such as a high-profile keynote session, an element of participant engagement may not be appropriate. In such cases, the sponsor should document the justification. This is outlined in Section 9, Paragraph 9.02.1.

8. **How will applicants be expected to prove and how will reviewers be expected to check for proof of participant engagement when options such as "virtual breakout rooms" or "collaboration with other participants" are chosen? What does the documentation need to look like for verification of the participant engagements?**

Participant engagement for group programs should be documented through the course design materials. For activities such as virtual breakout rooms or participant collaboration, the sponsor should retain the agenda, outline, instructor notes, slide prompts, case study, worksheet, or facilitator guide showing when the activity occurs, what participants are expected to do, and how the activity relates to the course content. The Standards do not require a separate transcript or recording of each breakout room solely to document participant engagement, unless the sponsor is also relying on that activity as part of attendance monitoring or completion verification. The sponsor should document that the activity was incorporated into and conducted as part of the course design. Individual participant responses generally do not need to be retained unless the activity is also used for attendance or completion verification.

9. **How many instances of participant engagement are required for a program that is offered for 0.5 CPE?**

Under Standard 5.01, all CPE programs must be designed to drive participant engagement. Standard 5.01.1 further requires a Group program to include participant engagement related to course content during each full CPE credit.

For a program offered for 0.5 CPE, the Standards do not specify a minimum number of participant engagement activities. However, the program must still be designed to drive participant engagement consistent with Standard 5.01. Sponsors should therefore incorporate an appropriate content-related engagement activity into the 0.5-CPE program based on the program’s design, learning objectives, and instructional strategy. Accordingly, while the Standards do not prescribe a specific number of engagement activities for a 0.5-CPE Group program, including at least one content-related engagement activity would be consistent with the requirement to design the program to drive participant engagement.

Completion Verification

1. **Where are the completion verification requirements outlined in the Standards?**

Section 6 of the 2026 Standards outlines these requirements.

2. **What about speaker credits? Can those be awarded in 1/5ths?**

Instructor credit is based on the CPE credit available to participants and the preparation and presentation limitations in Section 7.04.1. The instructor should also consult the applicable state board regarding acceptable credit increments and maximums.

3. **If the facilitator documents what time they announce a codeword, and if the participant submits that codeword, does that qualify as completion verification? Or must there be a timer associated outside of the codeword method?**

Technology based methods for completion verification measurements are required at least 3 times per CPE credit. If the method used accounts for individual presence in the CPE program and the time duration of their presence, what you have described should be compliant.

4. **If the facilitator documents what time they announce a codeword, and if the participant submits that codeword, does that qualify as completion verification? Or must there be a timer associated outside of the codeword method?**

Technology based methods for completion verification measurements are required at least 3 times per CPE credit. If the method used accounts for individual presence in the CPE program and the time duration of their presence, what you have described should be compliant.

5. **If technology is used to check-in at the beginning of a class and missed time can be noted, is that sufficient? Or is a check-out also required?**

If using a technology based method for completion verification, it would need to be at least 3 times per CPE credit hour.

6. **Are the monitoring and oversight learner-to-attendance 25:1 and 100:1 ratios required for group learning live online programs?**

Standard 6.01.1 does not establish a single required attendance-monitoring model or require all listed methods to be used cumulatively. Standard 6.01.1 does not establish a single required attendance-monitoring model or require all listed methods to be used cumulatively. The 25:1 and 100:1 learner-to-attendance-monitor ratios apply when an instructor or attendance monitor is being used as the sole method of real-time attendance monitoring. If a sponsor uses a combination of attendance records, technology-based verification, and review by an instructor, monitor, or program coordinator, the ratios would not necessarily apply, provided the overall process adequately verifies each individual participant's attendance and duration of presence

7. **Is there a scenario for Group in person programs where sponsors are not subject to the role-based verification and ratio requirement? (6.01.1 The learner-to-attendance monitor ratio must not exceed 25:1, unless a dedicated attendance monitor is assigned in which case the ratio must not exceed 100:1)**

Yes. The 25:1 / 100:1 ratios are not necessarily required when an in-person Group program uses a combination of reliable completion-verification methods rather than relying solely on an instructor or attendance monitor. The overall process must adequately account for each participant's presence and duration of attendance.

8. **Are attendance logs still appropriate as a measure of completion verification?**

Yes. Attendance logs remain an acceptable completion-verification method under Standard 6.01.1. However, the documentation maintained should adequately support both the participant's presence and the duration of attendance. Depending on the program format and the sponsor's process, attendance logs may be used alone or in combination with other verification methods, such as technology-based mechanisms or review by an instructor, attendance monitor, or program coordinator

9. **If my Group program is always using technology-based methods for tracking attendance, then there must be 3 Engagements per CPE credit.**

If a group program uses technology-delivered attendance prompts or verification mechanisms to track attendance, Standard 6.01.1 requires those mechanisms to occur at least three times per 50-minute CPE credit and to lack predictability. This is separate from the participant engagement requirement in Standard 5.01.1, which requires content-related engagement during each full CPE credit but does not prescribe three engagement activities per credit

10. Can attendance monitors be someone in the session?

If an attendance monitor is also receiving CPE credit, the sponsor should ensure that the monitor's attendance is verified through a method other than the monitor's own attestation—for example, instructor or coordinator verification, platform attendance records, or other documented attendance mechanisms.

If the individual is serving as a **dedicated attendance monitor** for purposes of the 100:1 ratio, there is an additional practical concern: the sponsor should be able to demonstrate that earning CPE credit did not interfere with the person's dedicated monitoring responsibilities.

11. Is it sufficient to monitor when participants enter and exit a room in order to meet the completion verification requirements?

Monitoring participant entry and exit may be used as part of the completion-verification process, but entry and exit records alone may not be sufficient. The sponsor's overall process should reasonably verify each individual participant's presence and duration of attendance throughout the program, including any late arrivals, early departures, or extended absences.

12. Does Zoom attendance tracking "lack predictability"?

Zoom itself is not inherently predictable or unpredictable. The determination depends on **how the sponsor configures and administers the attendance-verification process**. Passive login/logout tracking can support completion verification, but if the sponsor is relying on technology-delivered attendance prompts under Standard 6.01.1, those prompts should occur at the required frequency and at times that participants cannot reasonably anticipate.

13. If we are in a group in person with 1000 people and use a technology based attendance method - sign in, polling at intervals, etc. - are we still required to have 10 attendance monitors?

No. A sponsor would not automatically be required to have 10 attendance monitors for a 1,000-person in-person group program if it uses a combination of reliable attendance-verification methods. If the sponsor uses individual attendance records, technology-based verification such as polling or attendance prompts, and appropriate review or oversight, the 100:1 ratio would not necessarily apply. The overall process must adequately account for each participant's attendance and duration of presence.

14. Are non-technology based methods 3 per hour?

No. Non-technology based attendance verification methods would include items such as sign in/out sheets, QR codes participants scan, or other methods used track attendance. These should be verified by the sponsor for accuracy.

15. What are the guidelines concerning self-attestation?

Self-attestation of attendance from participants (such as a sign in sheet alone) is not compliant with the Standards. Best practices has required that when a sign in sheet is used, the sponsor uses additional methods (such as an attendance monitor) to keep track of late arrivals, early departures, and/or elongated breaks. This ensures participants are receiving CPE credit only for the time they are present.

16. If I have a group program and we choose to have completion verification be sign in and sign out with a tool such as conferences i.o, is that enough proof for completion verification? Or do you also need to have an instructor or attendance monitor attest to attendance?

A technology-based sign-in/sign-out process may be sufficient if it captures each participant's identity and duration of attendance and provides independent verification of participation consistent with Standard 6.01.1. A separate instructor or attendance monitor attestation is not necessarily required if a technology-based administrator or system provides that verification. However, participant self-check-in and self-check-out alone, without additional verification, would not be sufficient because self-certification alone is not permitted.

17. Zoom tracks attendance and our instructors note any absences over 10 minutes by paper. Is that sufficient?

Yes. Zoom attendance tracking combined with instructor documentation of participant absences can be an acceptable completion-verification process if, taken together, the records reliably verify each participant's identity and duration of attendance. However, the Standards do not establish a specific 10-minute absence threshold, so the sponsor should ensure that attendance variances are documented sufficiently to determine the correct amount of CPE credit.

18. For in-person group programs, we have to know the time they enter the session, the times of any breaks, and the times they leave the session and then add up their time. If they take a break, does that mean they don't get credit? Do we have to do the math for each person's total time in session and award partial credit?

Sponsors should track attendance sufficiently to identify late arrivals, early departures, and extended absences that could affect the amount of CPE credit earned. Normal scheduled breaks do not reduce credit because they are not included in instructional time. Sponsors do not need to calculate exact attendance minutes for every participant unless an attendance variance could affect the credit awarded. In those cases, the sponsor should determine the appropriate credit based on actual instructional time attended and the allowable credit increments under Standard 7.01.

19. What records do sponsors need to maintain for completion verification?

Sponsors must maintain records of program completion verification by individual participant, including the number of CPE credits earned by participant. The documentation maintained should adequately support the CPE program completion methodology selected by the CPE program sponsor.

For example, if the CPE program sponsor selected to use an attendance log with indications of individual participant duration time, including sign in, sign out and any elongated breaks for program completion verification, then the attendance log for the program including all the aforementioned elements of information should be maintained.

If the group program is a webinar/webcast and the CPE program sponsor used a real time attendance monitoring mechanism to verify that participants are in attendance during the program, then the CPE program sponsor must retain documentation that serves as the evidence of the individual participant response to the attendance monitoring mechanisms. This is outlined in Section 9, Paragraph 9.02.1 in the Standards.

20. In a session with polling questions, if we have 3 polls for tracking attendance, and 1 poll that is content related, do all participants need to respond to the content related poll to receive credit? Or would they still be eligible for credit by responding to 3 general polls?

The content-related engagement poll does not have to be treated as an additional attendance requirement unless the sponsor has specifically made it part of its completion-verification policy.

21. Do sponsors need to have people sign in 3 times per 50 minutes for a group program?

No. Completion verification is only required three times per CPE credit when using technology-based methods.

22. If an instructor is monitoring attendance, are they expected to document 3 times per CPE while instructing the course?

When attendance is monitored directly by an instructor or attendance monitor, the sponsor should maintain attendance records that identify the participant, document the duration of attendance, and include an attestation of participation with any attendance variances noted. The instructor is not expected to document attendance three separate times per credit while instructing unless the sponsor is using that type of mechanism as its selected verification method.

CPE Credit & Calculation

1. **What is the new minimum credit calculation based on time. Historically I believe it was 1 CPE credit per 50 minutes?**

The time basis has not changed: 50 minutes equals 1 CPE credit. For group programs, the minimum initial award may be 0.5 credit, with additional credit increments allowed after the first full credit in accordance with Standard 7.01.

2. **If a presenter is covering the same content each time the class comes up (three times per year), may they claim presenter credit for each time they present? The content is substantially the same, but discussions may cause a change in emphasis each class.**

Typically, Boards will not accept credit for the same course in a reporting period unless the material has substantially changed. For repeat presentations, CPE credit can be claimed only if it can be demonstrated that the learning activity content was substantially changed, and such change required significant additional study or research.

3. **Do the CPE increment changes for Group contradict any current State board rules on credit increments/minimums?**

As has always been the case, Board statutes and rules allowable increments for CPE may be different than those specified in the Standards.

Other

23. How should sponsors interpret the participant engagement requirements across different Group learning environments?

Group programs must include content-related participant engagement during each full CPE credit. The specific engagement method may vary by learning environment and should be appropriate to the course design. In-person and online programs do not need to use identical methods, and participant engagement should be distinguished from attendance-verification requirements.

24. What types of evidence or documentation would generally be considered sufficient to demonstrate compliance with the engagement requirements?

For documentation, sponsors should retain program-level evidence showing where engagement was planned, such as, but not limited to an agenda, outline, speaker notes, facilitator guide, or activity materials. Separate participant-level records must support attendance, duration, and the amount of CPE awarded.

25. Where engagement is demonstrated through methods other than polling, how much evidence would NASBA expect sponsors to retain to support the CPE awarded?

Individual responses generally need to be retained only when the engagement activity is also being used as an attendance or completion-verification mechanism. The Standards do not prescribe a specific volume of evidence for non-polling engagement, but the records should be sufficient to show that engagement was offered during each applicable CPE credit and that the CPE awarded was properly supported.