

Webinar Series Zoom Q&A

“2024 to 2026 Standards: Crossing the Bridge Together: Session 3”

Blended Learning 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 3.” 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.

Table of Contents

General Questions

1. Do I need to go back into existing Blended Learning programs to update with the new 2026 requirements like Participant Engagement and Completion Verification?
2. What is a primarily synchronous blended learning program?
3. What is a primarily asynchronous blended learning program?
4. What does it mean if the asynchronous portion of the course is adaptive?
5. We have Group and QAS self study - under what circumstances would a Blended Learning sponsorship be useful?

Participant Engagement

1. What is Participant Engagement?
2. What are some examples of Participant Engagement?
3. How many Participant Engagement instances do I need to have in the synchronous portion of my program?
4. How many Participant Engagement instances do I need to have in the asynchronous portion of my program?
5. Do we have to provide feedback for review questions and other content reinforcement tools?

6. Do participants have to complete all Participant Engagement to earn full CPE credit?

Completion Verification

1. What is Completion Verification?
2. What are some examples of Completion Verification?
3. What is the difference between technology based and nontechnology-based methods & what are the requirements of each?
4. Do I need to have Completion Verification measures in the synchronous portion of my program?
5. Do I need to have Completion Verification measures in the asynchronous portion of my program?
6. What are the requirements of the qualified assessment for the asynchronous portion of a program?
7. What are the Completion Verification requirements for an adaptive asynchronous portion of the course?
8. When can Completion Verification also be considered Participant Engagement?
9. Can Completion Verification count as the Participant Engagement requirement for a primarily asynchronous blended learning program?
10. What are the Pre-Program Assessment requirements?
11. 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?
12. Are we required to keep a participants' completed assessment after they pass?
13. In adaptive components of the asynchronous portion of a blended learning program, a qualified assessment is not necessary if the program requires 100% correct responses in order to complete the program. Is this also true for standard QAS™ self study adaptive learning programs (not part of a Blended Learning program)?
14. When using Completion Verification measures for the synchronous portion of a blended learning program, 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?

CPE Credits & Calculation

1. How do I calculate the recommended CPE credit for a blended learning course?
2. How do I determine the primary component of my program?
3. What are the minimum required CPE credits for each portion of a blended learning program? What is the minimum required CPE credit for a blended learning program as a whole?
4. We recently received a new fillable PDF word count document. Does this replace the old excel word count doc?
5. At a minimum, Group CPE can now be offered at 0.5 credits, but blended learning is 1.0 credits, correct?

General Questions

- 1. Do I need to go back into existing Blended Learning programs to update with the new 2026 requirements like Participant Engagement and Completion Verification?**

Yes, all sponsors will be required to implement these changes no later than 11-1-28.

- 2. What is a primarily synchronous blended learning program?**

When a blended learning program is primarily synchronous, participants spend the majority of the time attending the program live with an instructor. CPE credits for pre-program, post-program, and homework assignments cannot exceed 25 percent of the total CPE credits available for a primarily synchronous blended learning program.

- 3. What is a primarily asynchronous blended learning program?**

When a blended learning program is primarily asynchronous, participants spend most of their program time working and learning independently, while a smaller portion of the time attend the program live with a group of other attendees.

- 4. What does it mean if the asynchronous portion of the course is adaptive?**

Asynchronous components which follow an adaptive format include technology tools to deliver customized learning activities. In adaptive program components, participants can encounter a variety of learning paths dependent on the responses given throughout course content.

- 5. We have Group and QAS self study- under what circumstances would a Blended Learning sponsorship be useful?**

The blended learning delivery method is for programs which have synchronous and asynchronous components. In this type of program, participants would spend some time learning live with an instructor and some time learning course content independently. In a blended learning program, participants must complete both components in order to earn CPE credits for the entire program.

Participant Engagement

1. What is Participant Engagement?

This is a new term which addresses the way sponsors design programs of learning and learning activities to drive participants' levels of attention, involvement, interest and active participation.

Primarily Synchronous Programs: Blended learning programs must be designed to drive Participant Engagement. When the primary component is synchronous, sponsors may consider Paragraph 5.01.1 for guidance.

Primarily Asynchronous Programs: When the primary component is asynchronous, sponsors may consider Paragraphs 5.01.2 through 5.01.2.2 for guidance.

2. What are some examples of Participant Engagement?

Some examples of Participant Engagement include interactive content, group discussions, hands-on activities, simulations, case studies, review questions, and personalized learning paths.

3. How many Participant Engagement instances do I need to have in the synchronous portion of my program?

For a primarily synchronous blended learning program, sponsors may use the group-program standard as guidance by planning content-related Participant Engagement during each full CPE credit. The Standards do not require individual responses to be tracked solely for participant-engagement purposes. However, response records may need to be retained when the same components are used for Completion Verification or attendance monitoring.

4. How many Participant Engagement instances do I need to have in the asynchronous portion of my program?

Primarily asynchronous blended learning programs, may apply the self study participant-engagement requirements as guidance. Under that guidance, a full CPE credit includes at least three review questions or other content-reinforcement tools with scored responses. Review questions or other content reinforcement tools must be placed throughout the program at sufficient intervals. The 2026 Standards allow for self study programs to be offered for 0.2 CPE at minimum. If the self study program is offered for 0.2 (one-fifth) CPE credits, no review questions or other content reinforcement tools are required. For asynchronous components exceeding 0.2 CPE credit, sponsors using self study provisions as guidance may use the chart in Paragraph 5.01.2.1 to determine the appropriate number of participant-engagement instances. After the first full CPE credit, additional review questions or other content-reinforcement

tools with scored responses should be added based on the additional credit amount shown in the chart.

5. Do we have to provide feedback for review questions and other content reinforcement tools?

For self study programs, the Standards also require feedback on review questions or other content reinforcement tools. At minimum, the feedback must indicate whether the response was correct or incorrect.” The goal of providing feedback is to reinforce understanding, highlight knowledge gaps, and provide additional resources for learning comprehension. It would still be best practice to include reinforcement and evaluative feedback of some kind, but the feedback requirement may be satisfied by indicating ‘correct’ or ‘incorrect,’ provided all other applicable Standards are met. Primarily asynchronous blended programs may consider this provision for guidance.

6. Do participants have to complete all Participant Engagement to earn full CPE credit?

Individual participant responses do not have to be tracked solely for Participant-Engagement purposes. However, the program must still be designed to drive participant engagement. Response records may need to be retained when the same activity is also used for Completion Verification or attendance monitoring.

Completion Verification

1. What is Completion Verification?

Primarily Synchronous:

For the synchronous portion of a blended learning program, this refers to the process sponsors use to verify and monitor individual attendance throughout programs. The Completion Verification process should account for individual presence and the duration of attendance. These requirements can be satisfied via technology-based or non-technology-based methods. Regardless of methodology, participant self-certification alone is not sufficient to satisfy the completion-verification requirement.

Primarily Asynchronous:

For the asynchronous portion of a blended learning program, Completion Verification covers the process sponsors use to verify individual program completion and assign the correct number of CPE credits to courses. This is referred to as the qualified assessment. Completion Verification for primarily asynchronous blended learning programs was simply called the “qualified assessment,” in the 2024 Standards. The term “qualified assessment” has not been removed, but it is now under the heading titled, “Completion Verification.”

2. What are some examples of Completion Verification?

Primarily Synchronous:

The Completion Verification process should account for individual presence and the duration of attendance. Completion Verification requirements can be satisfied via technology-based or non-technology-based methods. Regardless of methodology, participant self-certification alone is not sufficient to satisfy the completion-verification requirement.

3. What is the difference between technology based and non-technology-based methods & what are the requirements of each?

Technology-Based Methods:

When technology-delivered attendance prompts or verification mechanisms are used under the applicable group-program completion-verification provisions, they must occur at least three times per 50-minute credit hour and must lack predictability. If the program is marketed for one-half CPE credits, then two attendance monitoring mechanisms must be employed and completed by the participant. The minimum number of additional instances of Completion Verification after the first full CPE credit are provided on the chart located in Paragraph 6.01.1.

Examples: tools such as QR codes, key word/codes, polling questions, electronic badging, and platform-based attendance prompts

Non-Technology-Based Methods:

For non-technology-based methods, used under the group program guidance, sponsors should establish and document procedures addressing how attendance is monitored, who performs the monitoring, what records are retained, and how credit is determined. These methods should capture each participant's identity and indicate the duration of attendance along with a statement from the program instructor or attendance monitor verifying learner participation and noting any variances in attendance time.

Examples: Sign-in sheets and attendance logs. Take note that when sponsors use sign-in sheets, there must be a plan in place to be able to monitor and document late arrivals, early departures, and elongated breaks. As a reminder, if these methods are related to the course content, they can double as the Participant Engagement for the course.

4. Do I need to have Completion Verification measures in the synchronous portion of my program?

As defined in Section 6, blended learning programs which include significant synchronous content must follow the Completion Verification requirements like a group program would.

5. Do I need to have Completion Verification measures in the asynchronous portion of my program?

As defined in Section 6, blended learning programs which include significant asynchronous content must follow the Completion Verification requirements like a self study program would. Asynchronous components which follow a traditional format must have at least 5 qualified assessment questions and scored responses per CPE credit. The 2026 Standards allow for self study programs to be offered for 0.2 CPE at minimum. If the asynchronous portion of the blended learning program is offered for 0.2 (one-fifth) CPE credits, there must be at least 2 qualified assessment questions or scored responses. After the first one-fifth credit is earned, qualified assessment questions and scored responses are required based on the one-fifth credit measurement amount of the program as shown in the chart located in Section 6. After the first full credit and the minimum of five questions and scored responses per CPE credit, additional items are required based on this chart.

For example, if the asynchronous portion of the blended learning program is offered for 0.5 CPE, there must be at least 4 qualified assessment questions. If a program is

offered for 1.2 CPE, there must be at least 7 qualified assessment questions. The sponsor would have the initial 5 questions + the additional 2 as outlined in the chart.

6. What are the requirements of the qualified assessment for the asynchronous portion of a program?

Assessments may contain questions of varying format such as: multiple choice, essay, and simulations. Except in courses in which recall of information is the learning strategy, duplicate review and qualified assessment questions are not allowed. Forced choice responses such as “True or false” or “yes or no” questions are not permissible on the qualified assessment. Participants must achieve at least 70% to earn CPE credit for a course. Qualified assessment questions or scored responses must measure a representative number of learning objectives, with 75% or more constituting a representative number. The number of re-takes a participant is permitted to take is at the sponsor’s discretion.

Feedback Guidelines: Feedback guidelines have remained the same in the 2026 Standards and are at the sponsor’s discretion. One option is to provide participants solely with the score they have achieved without any other feedback. After a participant passes the assessment, the sponsor may provide feedback consistent with Standard 6.01.2, such as identifying correct and incorrect answers. If feedback is provided prior to learners achieving the minimum passing grade of 70%, guidelines are based on whether a test bank is used. If a test bank is not being used, feedback can only be provided once a 70% has been achieved. If using a test bank, it must be of sufficient size to minimize the overlap of questions from one attempt to the next.

7. What are the Completion Verification requirements for an adaptive asynchronous portion of the course?

The minimum requirement of at least 5 questions and scored responses per CPE credit must be met by the fastest completion path through the program. When assessment questions are used to evaluate the participant’s path throughout the program and require a 100% success rate to complete it, then an additional qualified assessment is not required at the end of the course.

8. When can Completion Verification also be considered Participant Engagement?

If Completion Verification measures are content related (supportive of the course content and learning objectives), they can also be considered to satisfy the Participant Engagement requirements. Please note that Participant Engagement and Completion Verification are two distinct requirements, but a single activity may be used to satisfy both requirements when it is related to the course content and learning objectives and also meets the applicable Completion Verification requirements.

9. Can Completion Verification count as the Participant Engagement requirement for a primarily asynchronous blended learning program?

No. Primarily Asynchronous BL courses must have both review questions/content reinforcement tools AND a qualified assessment. The qualified assessment cannot count as both the Participant Engagement and the Completion Verification methods.

10. What are the Pre-Program Assessment requirements?

The prior restrictions concerning feedback and reuse of pre-program assessment questions were removed. Under the 2026 Standards and for CPE measurement purposes, Paragraph 7.02 states that a pre-program assessment is not included in the CPE-credit computation.

11. 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?

A codeword may be used as a technology-based completion-verification mechanism if it captures the individual participant's response, helps establish presence for the relevant duration, is used at the required frequency, and lacks predictability. A separate timer is not necessarily required if the sponsor's overall process adequately documents attendance duration

12. Are we required to keep a participants' completed assessment after they pass?

The 2026 Standards do not explicitly require sponsors to retain each participant's completed assessment or individual answers after the participant passes.

Under Standard 9.02.3, a blended learning sponsor must retain, for at least five years:

- The documentation of the course progression
- What CPE credits were earned by individual participants upon the completion of the components

A record showing the participant's score, passing status, assessment attempt, and completion date would generally support compliance.

13. In adaptive components of the asynchronous portion of a blended learning program, a qualified assessment is not necessary if the program requires 100% correct responses in order to complete the program. Is this also true for standard QAS™ self study adaptive learning programs (not part of a Blended Learning program)?

Yes, this standard requirement is the same for QAS™ self study programs. This is outlined specifically in Paragraph 6.01.2.

14. When using Completion Verification measures for the synchronous portion of a blended learning program, 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?

A specific check-out mechanism is not separately required. However, a single check-in at the beginning would not be sufficient when technology-based Completion Verification is used. The sponsor must use the required number of unpredictable verification mechanisms throughout the program and maintain records sufficient to establish individual presence and duration.

CPE Credits & Calculation

1. How do I calculate the recommended CPE credit for a blended learning course?

Paragraph 7.03 explains that sponsors must first determine the CPE credit attributable to each completed component of a blended learning program. Once the credit attributable to each component has been determined, the sponsor adds the component amounts together to determine the recommended CPE credit for the blended learning program as a whole.

For measurement purposes, sponsors may generally apply the methodology that corresponds to the nature of each component.

Synchronous component: based on the actual-duration methodology used for group programs, with 50 minutes of qualifying learning content equal to one CPE credit.

Asynchronous component: use an applicable self study methodology, such as pilot testing or the prescribed word-count formula. Actual audio or video duration may also be used when appropriate. These methodologies are used to calculate the value of the individual components. They do not convert the components into separate group or self study programs, and the minimum-credit rules for stand-alone group and self study programs do not apply separately to each component.

2. How do I determine the primary component of my program?

In general, the primary component is the synchronous or asynchronous category that represents the greater portion of the program's learning activities. Sponsors should consider the overall design of the program and the CPE attributable to each component when making that determination. A primarily synchronous program is mostly live, instructor-controlled learning; a primarily asynchronous program is mostly independently completed learning.

3. What are the minimum required CPE credits for each portion of a blended learning program? What is the minimum required CPE credit for a blended learning program as a whole?

A blended-learning program must award a minimum of one full CPE credit initially. The Standards do not establish a separate minimum credit amount for each synchronous or asynchronous component. Each component's credit must be determined using the applicable measurement methodology, and the total program credit must equal the sum of the completed components.

4. We recently received a new fillable PDF word count document. Does this replace the old excel word count doc?

The NASBA Registry offers an excel word count formula document on the Templates page of our website located at: <https://www.nasbaregistry.org/registry-forms--policies/sample-templates> Sponsors are not required to use that resource, but it is there if you would like to. There is also a new resource available titled, "CPE Calculation" in the Blended Learning column which you can use for more information and calculation examples. The Registry has not recently sent out or created any new fillable PDF documents. Please be sure to verify that any communications from the NASBA Registry are coming from cpe@nasba.org.

5. At a minimum, Group CPE can now be offered at 0.5 credits but blended learning is 1.0 credits, correct?

Yes, this is correct. Blended learning programs must have a minimum of 1 CPE.