



Group Live Program List Instructions

Initial, Additional Delivery Method (ADM), & Renewal Applications

A program list is required for submission with an application. The purpose of the program list is to provide an outline of what courses your organization anticipates offering for CPE credit with your approved NASBA sponsor identification number over the year following sponsorship approval/within the renewal year. The number of programs present on the program list's total must be within the program level range identified in the initial, ADM, or renewal application process.

The program list should outline the following:

- **Program/Course Title**
- **Delivery Method**
- **Recommended CPE credits**
- **Field(s) of study**
- **Date**

Program/Course Title

- For the program title, please list the program title exactly as it is advertised or promoted to participants. The title must match exactly across all documentation.
- If your organization offers different delivery method programs which have the same title, they must still be represented as two separate courses on the program list, as shown in the example below. In this scenario, these courses count as two different programs.

Program Title	Delivery Method	Number of Recommended CPE credits	Date of Program	Field(s) of Study	
Tax Processing Form Training	Group Live	6.0	6/4/24-6/7/24	Computer Software & App	6.0
Tax Processing Form Training	Group Internet Based	6.0	6/4/24-6/7/24	Computer Software & App	6.0

- When the program being referenced is for courses offered within a conference, each individual session does not need to be represented unless you are providing separate certificates for each session. Put the title of the whole conference in the “Title” section, as shown in the example below.



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The example below shows how to represent a conference with concurrent programs:

Program Title	Delivery Method	Number of Recommended CPE credits	Date of Program	Field(s) of Study	
2024 National Conference <i>each attendee could only earn up to 21 CPE credits during the 3.5 day program</i>	Group Live	21.0	06/04/2024 - 06/07/2024	Computer Software & App Information Technology Personnel/Human Resources Management Services Finance Accounting Personal Development	up to 21 18.0 7.5 6.0 3.0 1.5 1.5

The example below shows how to represent the course titles when providing separate certificates of completion for each session at a conference:

Program Title	Delivery Method	Number of Recommended CPE credits	Date of Program	Field(s) of Study	
2024 National Conference	Group Live		6/4/24-6/7/24		36.0
From AgilLink to GoSystem With Trial Balance	Group Live	6.0	6/4/24-6/7/24	Computer Software & App	6.0
Understanding US Tax Laws for UK Residents	Group Live	6.0	6/4/24-6/7/24	Taxes	6.0
Navigating US Tax Regulations for UK Citizens	Group Live	6.0	6/4/24-6/7/24	Taxes	6.0
US Tax Compliance Review: Closing the Gaps	Group Live	6.0	6/4/24-6/7/24	Taxes	6.0
Doc.It Update 2024	Group Live	6.0	6/4/24-6/7/24	Computer Software & App	6.0
Tax Processing Form Training	Group Live	6.0	6/4/24-6/7/24	Computer Software & App	6.0

Delivery Method

- Delivery methods recognized within the [Statement on Standards](#) include the following:
 - Group Live
 - Group Internet Based
 - QAS™ Self-Study (Traditional)
 - QAS™ Self-Study (Adaptive)
 - Blended Learning
 - Nano Learning

It is not acceptable to identify a program's delivery method as anything other than those listed above.

- The delivery method shown in this section of the program list should match that which is identified on the course certificate of completion.



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- The Blended Learning delivery method never applies to courses utilizing Group Live and Group Internet Based methods simultaneously. Please see [Standard 23-02](#) for more information regarding simultaneous delivery.
- If utilizing [Standard 23-02](#) for simultaneous delivery, the program list should reflect the same delivery method(s) that were noted on the certificate(s).
- The Blended Learning delivery method only applies to courses which have both synchronous (group) AND asynchronous (self-study) components. This is never an appropriate delivery method to choose when attempting to combine two random delivery methods into one course.
- The delivery method should match exactly across all documentation.

Recommended CPE Credits

- For the Group Live delivery method, the number of CPE credits are measured by program length with one 50-minute period equal to one CPE credit as outlined in Standards [16](#) and [23](#).
- When courses referenced on the program list offer multiple fields of study per program, each field of study must be broken down by CPE credit. In addition to the breakdown of CPE credit dispersal, the total amount of CPE credit that can be earned for that course must also be clearly identified, as shown in the example below.

Program Title	Delivery Method	Number of Recommended CPE credits	Date of Program	Field(s) of Study	
Tax Processing Form Training	Group Live	6.0	6/4/24-6/7/24	Computer Software & App	2.0
				Information Technology	2.0
				Specialized Knowledge	2.0

- See [Standard 16](#) for an outline of compliant CPE increment values.
- The recommended CPE credits should match exactly across all documentation.

Field(s) of Study

- When courses referenced on the program list offer multiple fields of study per program, each field of study must be broken down by CPE credit. In addition to the breakdown of CPE credit dispersal, the total amount of CPE credit that can be earned for that course must also be clearly identified, as shown in the example below.



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Program Title	Delivery Method	Recommended CPE credits	Date of Program	Field(s) of Study	
Tax Processing Form Training	Group Live	6.0	6/4/24-6/7/24	Computer Software & App	2.0
				Information Technology	2.0
				Specialized Knowledge	2.0

- The field(s) of study should match exactly across all documentation.
- Consult the [Fields of Study](#) document for a list of approved distinctions.

Date

- The course date is the date on which the Group Live program is set to occur. For renewal applications, this should list the date on which the program occurred.
- When certain courses span over a period rather than on one set date, please provide the date range of the course.
- The course date should match exactly across all documentation.



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