QAS™ Self-Study Application Checklist

This checklist has been created as an aid for all applicants to use when preparing/developing a course for review and is based on the 2024 Statement on Standards. The checklist contains the main components used by the Registry team when considering a QAS™ Self Study application. Additionally, helpful tips and hyperlinks are provided where applicable so that you can easily utilize all templates and resources provided on our website. Using this checklist prior to course submission will help ensure your program's compliance with the Standards.

1. Learning activities include one of the acceptable subject areas to maintain or improve the professional competency of a CPA. *Standards No. 4, No. 12, and No. 23 and Field of Study Classification*

☐	The field of study is appropriate for the content of the course materials.

*For more information about the fields of study category, follow this direct link to the Registry website or go directly to the document here.

2. Develop programs specifically for instructional use. *Standards for CPE Program Development, Standard No. 9-07.*

☐	The course was designed for instructional use.
☐	Course materials are cohesive and reflect a well-planned design from start to finish.
☐	The course has the following required components: ☐ Table of Contents ☐ Course Navigational Instructions ☐ Course Glossary for key words within course material ☐ Alphabetical index or word search function that allows participants to reference specific information within the course **What does this mean?** The self-study program must include the ability to find information quickly. Typically, this can be accomplished by providing an index or word search feature. An index is an alphabetical listing of important topics provided at the end of the program as an educational reference. The intention of this instructional aid is to assist participants in returning to specific topics within the course material. This allows participants to quickly reference information that requires additional instruction or clarification. When providing an electronic program, a key word search or a searchable transcript may perform the same function as an index. The course instructions should clearly indicate the existence of the index/key word search as well as any additional information or instructional references provided in the course. **Some examples of ways this can be achieved:** • A column could be added to the course glossary, which identifies the module and timestamp that specific word can be found within the course (similar to the example chart above) • Transcript in a searchable word/pdf document which has the transcript of the entire presentation that can be searched using the ctrl + f function. • A searchable live transcript which is available on the side of the video window to access while viewing the modules • Course slide deck in a searchable format when using the ctrl + f function

- List of key topics from within each module with the timestamp of where they can be found.
  Example (using arbitrary content):

Course Title: Types of Food		
Key Topic	**Module # & Title**	**Timestamp**
Chicken	1: Meats	05:22
Brown Rice	2: Grains	02:13
Apples	3: Fruits	04:44

☐ Learning objectives are included within the course material for each significant learning activity.

☐ Clear Instructions about the following:

    ☐ How and where to find and access the glossary

    ☐ What is included in the course for completion (e.g, number of modules, review questions throughout, qualified assessment)

    ☐ How and where to find and access the alphabetical index/word search function

3. **Clearly defines learning objectives and demonstrates a clear plan of study with materials that are specifically developed for instructional use in a self-study environment.** *Standards for CPE Program Development, Standard No. 2 and Standard No. 9.*

*For best practices about Learning Objectives, follow this direct link to the Registry website and click on the drop down titled, "Learning Objectives."

☐	Learning objectives articulate the professional competence that can be achieved by participants. (If unsure, see the "Note on Learning Objectives," below.)
☐	Learning objectives are relevant for the learning activity.
☐	The program is developed in a manner consistent with the learning objectives.

A Note on Learning Objectives

Learning Objectives should clearly indicate the abilities that the learner will be able to exhibit upon completion of the course. If the action cannot be measured using the chosen assessment format (most often multiple-choice) the objective language should be edited. For example, a learning objective such as *Explain/Describe how to use the ABC ranking method to group clients based on their profitability and importance to the firm* is difficult to assess in a multiple-choice format. "Explain/Describe," would indicate an outcome that participants would be able to present information in either speech or in writing. While the learning activities may include exercises that allow the participant to practice these activities, a multiple-choice formatted qualified assessment cannot accurately measure this achievement. For the CPE sponsor to be able to assess whether the participant successfully achieved this type of outcome, essay questions or activities would need to be included in the qualified assessment.

Below is an example that illustrates the difference between poorly defined objectives and learning objectives that clearly articulate the knowledge, skills and abilities to be achieved. Some examples of poorly defined objectives:

- *Be familiar with the basic levels in an organization*
- *Know the types of strategic plans developed at each level*
- *Understand the organizational strategic planning process*
- *Learn the four steps in the organization strategic planning process*

These objectives do not indicate observable behaviors which makes assessment of their mastery impossible. To confirm mastery, what is meant by "know, "learn" or "understand" should be clearly defined in measurable terms.

The following performance objectives are good examples of the use of observable behaviors.

After completing this course you will be able to:

- *Differentiate between the three basic levels in an organization*
- *Identify the six types of strategic plans*
- *Recognize the strategic plan with the appropriate organization level*
- *Define the four steps in the organization strategic planning process*

Bloom's Taxonomy and following the SMART format for goal writing can be helpful points of reference when deciding on the action verb needed for each learning objective. Be sure that the chosen verbs within the learning objectives can be measured using the chosen qualified assessment format.

Some verbiage recommendations which tend to be measurable by multiple-choice questions are:
- Identify
- Recognize
- Differentiate
- Distinguish between
- Define
- Evaluate
- Assess

The use of the following verbs is discouraged in learning objectives which are tested by multiple-choice assessments, as the measurement of such would indicate that the learner would need to demonstrate mastery through the use of spoken word, short answer, or case study format and observed by a live instructor. While the course itself may have activities supporting these objectives, the multiple-choice format of the qualified assessment cannot measure these goals. When writing the course learning objectives, please avoid their use.
- Explain
- Describe
- Discuss
- Demonstrate
- Design
- Summarize
- Enforce
- List

The use of the following verbs is discouraged in learning objectives for self-study courses as they are vague and do not articulate specific abilities that the learner should be able to do upon course completion. When writing the course learning objectives, please avoid their use.
- Understand
- Know
- Learn
- Become familiar with
- Abide by
- Use

	4. Employ activities, materials, and delivery systems that are current, accurate, and effectively designed. *Standards for CPE Program Development, Standard No. 4 & No. 5.*
	*For best practices about the course publication/revision/review date, follow this <u>direct link</u> to the Registry website and click on the drop down titled, "Course Publication, Revision or Review Date."
☐	The course materials are grammatically correct.
☐	The course publication/revision/review date is included in the course material.
☐	The course was created specifically by/for the applicant.
	☐ Yes
	☐ No If no, was the course purchased from a Registry approved Sponsor? ☐ Yes If the content is purchased from a sponsor registered with NASBA on the National Registry of CPE Sponsors, then the CPE program sponsor that issues the certificate of completion under its name must maintain the author/developer and content reviewer documentation from that sponsor to satisfy the content development requirements of the Standards. The documentation should be maintained as prescribed in Standard No. 24. ☐ No If the content is purchased from an entity not registered with NASBA on the National Registry of CPE Sponsors, then the CPE program sponsor must independently review the purchased content to ensure compliance with the Standards. If the CPE program sponsor does not have the subject matter expertise on staff, then the CPE program sponsor must contract with a content reviewer to conduct the review. The CPE program sponsor must maintain the appropriate documentation regarding the credentials and experience of both the course author/developer(s) and content reviewer(s) as prescribed in Standard No. 24.

5. **Elicit participant responses to allow the participant the opportunity to evaluate the material that needs to be restudied, offer evaluative feedback to incorrect responses, and provide reinforcement feedback to correct responses.** *Standards for CPE Program Development, Standard No. 9-01, 9-02 and 9-03.*

*For best practices about evaluative and reinforcement feedback, follow this direct link to the Registry website and click on the drop down titled, "Providing Evaluative and Reinforcement Feedback."

*For best practices about review question placement, follow this direct link to the Registry website and click on the drop down titled, "Placement of Review Questions."

☐	The course has the minimum number of review questions or other content reinforcement tools.

*There should be 3 review questions per recommended CPE credit.

*True/False formatted questions are permissible within the review questions; however, these types of questions cannot be counted towards the minimum number of review questions when determining CPE credit.

☐	Review questions or other content reinforcement tools are placed throughout the program in sufficient intervals.
☐	Review questions have evaluative feedback for each incorrect answer choice.

*Evaluative feedback should not be the same for each incorrect answer choice. Rather, feedback should be specific to each incorrect answer choice.

☐	Evaluative feedback indicates why the specific answer choice is incorrect.

*Unique feedback must be provided for each incorrect response, as each one is likely to be wrong for differing reasons. Selection of an incorrect answer indicates a lack of understanding of the concept presented. For this reason, evaluative feedback should appropriately address this misunderstanding by providing unique feedback that indicates exactly "why" that specific answer is incorrect. Explaining why an answer was incorrect should not be a statement providing the answer to the question.

EXAMPLE:
The address of a web site is technically known as what?
    a) URL
    b) HTTP
    c) HTML
    d) WEB

Compliant Feedback:
    a) Correct, because URL stands for universal resource location which is the technical term for a web site address.
    b) Incorrect, HTTP is a communication protocol.
    c) Incorrect, HTML is the markup language for the creation of web page.
    d) Incorrect, WEB is a misnomer for the Internet as a whole.

The evaluative feedback for incorrect responses is adequate, as the student is informed why that specific response is wrong without providing clues or the answer to the question.	
☐	Review questions have reinforcement feedback for each correct answer choice.
☐	Reinforcement feedback indicates why the specific answer choice is correct.
*Although a correct response may indicate understanding of the concept presented, reinforcement feedback should be provided for participants who have guessed the correct answer or arrived at the correct response for an incorrect reason. To ensure understanding, the Standards require that reinforcement feedback provide logical reasoning as to why the answer is correct.	
☐	Review questions are not word for word from the course material
☐	Review questions focus on the knowledge, skills, and abilities articulated in the learning objectives.
☐	Are there True/False review questions? If so, these questions cannot be included in the total number of review questions to meet the minimum number required for the word count formula.
☐	Review questions follow established educational guidelines: ☐ Plausible Distractors *What does this mean? Incorrect answer choices are plausible when they are believable as possible answers to the question. When the incorrect answer choices do not match in plausibility with the correct answer, this gives the correct choice away to the learner and inhibits the ability to reason through the question independently. When creating the course questions, be sure that all distractors are plausible. ☐ Incomplete Statements in the Stem *What does this mean? Sometimes fill in the blank questions can contain leading verbiage to point the learner towards the correct answer. If these types of questions are used within the course, be sure that they do not contain pointed phrasing or clues that would give away the correct answer.

☐ Length or Precision of Correct Answer

*What does this mean?
When the correct answer differs noticeably in length from all the incorrect answer choices, this can point to the correct answer. When creating the course questions, check to be sure that answer choices are all similar lengths.

☐ Words or Phrases Do Not Contain Clues to the Correct Answer

*What does this mean?
Questions and answer choices should be written so that there are no clue words and phrases pointing to the correct answer. For example: A course has a question about identifying a type of storage option in a program. If the correct answer choice is the only one to use the key word "storage," it is likely the correct response. This clue points the learner to the correct answer and inhibits the ability to independently reason through the question. However, if all answer choices contain the key word, "storage," this would be an appropriate use of the term as it would not be a clue towards the correct choice.

☐ Answer choices are written to avoid "All of the above," options.

*Why should I avoid using this option?
Since participants merely need to recognize two correct options to get the correct answer, best practices suggest that the option "All of the above" should be avoided.

☐ Appropriate number of distractors

*What does this mean?
Questions should be written so that there are an appropriate number of distractors. Best practices suggest that there should be at least 3-4 answer choice options per question on multiple-choice assessments.

6. Program provides evidence of satisfactory completion of each program. *Standards for CPE Program Development, Standard No. 9-01, 9-04, 9-05, 9-06.*	

*For best practices about duplicate questions, follow this direct link to the Registry website and click on the drop downs titled, "Duplicative Questions," and "Qualified Assessment Requirements."

*For best practices about the use of a test bank, follow this direct link to the Registry website and click on the drop down titled, "Use of Test Bank."

☐	The qualified assessment contains at least 5 questions/scored responses per CPE credit.
☐	There are not any repeated questions between the qualified assessment and the review questions. The wording for qualified assessment questions must be changed significantly from the review questions and feedback to ensure that the qualified assessment is assessing understanding. (This is only acceptable when rote memorization is necessary, and recall is the learning strategy. This is a rare occurrence.)
☐	There are no true/false questions within the qualified assessment. *It is not permissible for there to be any true/false questions within the qualified assessment.
☐	Questions are not taken word for word from the course material.
☐	Questions focus on specific and important information from the course rather than general or common knowledge.
☐	The qualified assessment confirms at least 75% of the learning objectives have been achieved.
☐	Qualified assessment questions follow established educational guidelines: ☐ Plausible Distractors *What does this mean? Incorrect answer choices are plausible when they are believable as possible answers to the question. When the incorrect answer choices do not match in plausibility with the correct answer, this gives the correct choice away to the learner and inhibits the ability to reason through the question independently. When creating the course questions, be sure that all distractors are plausible.

☐ Incomplete Statements in the Stem

*What does this mean?
Questions and answer choices should be written so that there are no clue words and phrases pointing to the correct answer. For example: A course has a question about identifying a type of storage option in a program. If the correct answer choice is the only one to use the key word "storage," it is likely the correct response. This clue points the learner to the correct answer and inhibits the ability to independently reason through the question. However, if all answer choices contain the key word, "storage," this would be an appropriate use of the term as it would not be a clue towards the correct choice.

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When the correct answer differs noticeably in length from all the incorrect answer choices, this can point to the correct answer. When creating the course questions, check to be sure that answer choices are all similar lengths.

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*What does this mean?
Questions and answer choices should be written so that there are no clue words and phrases pointing to the correct answer. For example: A course has a question about identifying a type of storage option in a program. If the correct answer choice is the only one to use the key word "storage," it is likely the correct response. This clue points the learner to the correct answer and inhibits the ability to independently reason through the question. However, if all answer choices contain the key word, "storage," this would be an appropriate use of the term as it would not be a clue towards the correct choice.

☐ Answer choices are written to avoid "All of the above," options.

*Why should I avoid using this option?
Since participants merely need to recognize two correct options to get the correct answer, best practices suggest that the option "All of the above" should be avoided.

	☐ Appropriate number of distractors *What does this mean? Questions should be written so that there are an appropriate number of distractors. Best practices suggest that there should be at least 3-4 answer choice options per question on multiple-choice assessments.
☐	Participants are required to pass the qualified assessment with a minimum of 70% and the requirement is clearly indicated to the participants.
Regarding feedback for the qualified assessment, select one of the options below:	
☐	Feedback is not provided on the qualified assessment.
☐	Feedback is provided on the qualified assessment. If feedback is provided, one of the following pathways must be chosen.
	☐ If feedback is provided, there is a test bank large enough to minimize the overlap of test questions.
	☐ If feedback is provided and there is not a test bank large enough to minimize the overlap of test questions, the feedback is only given if the participant passes the qualified assessment first.
☐	Participants are required to complete the qualified assessment within one year of the date of purchase and the requirement is clearly indicated to participants.

7. Grant CPE credits based on a pilot test result of the representative completion time or prescribed word count formula. *Standards for CPE Program Measurement, Standard No. 16, 17, 8-02*	

☐	If a pre-program assessment was used in the course: ☐ The number of questions was not used in the determination of the recommended CPE. AND ☐ Pre-program assessment questions are not repeated in the qualified assessment for the course.
☐	CPE Calculation Methodologies- One of the following was implemented for the course:

☐ Pilot Testing:

    ☐ CPE credits are based on the representative completion time of at least three qualified individuals representing the intended audience of the programs. QAS™ Self-Study courses which are adaptive must base this calculation on at least seven qualified individuals representing the intended audience of the programs.
    Example- [(120+90+80)/3] = 96.6/50 = 1.93= 1.5 CPE or 1.8CPE

    ☐ There are not large variances in pilot testing results among testers. All results appear to represent a reasonable assessment of the completion time.

    ☐ Pilot testers have the appropriate level of knowledge (note: pilot testers should have the same level of knowledge as the intended course participants. i.e. a pilot tester with extensive knowledge in the subject should not pilot test a basic course)

    ☐ Pilot testers are independent of the author and course reviewers.

    ☐ Credits were rounded down to the nearest 1/5, ½, or whole credits

*Visit the Registry website for QAS™ Self Study Templates or go directly to the following link for guidelines and an example: Pilot Test Form

*For best practices about pilot testing measurement, follow this direct link to the Registry website and click on the drop down titled, "Method 1- Pilot Testing: Inconsistencies in Results of Pilot Testers," " Method 1- Pilot Testing: Requirement for Re-Pilot Testing," and "Method 1- Pilot Testing: Sample Group of Pilot Testers." For an example of pilot testing, click on the link under Tools and Templates titled, "Pilot Test Sample CPE Calculation Spreadsheet."

☐ Word Count Formula:
      ☐ CPE credits are based on the prescribed word count formula
[(# of words/180) + actual audio/video duration time + (# of questions * 1.85)]/50 = CPE credit
      ☐ Supplemental material has been excluded from the word count.
      ☐ The credits were rounded down to the nearest one-fifth, one-half, or whole credit.

*Visit the Registry website for QAS™ Self Study Templates and more information about the Word Count Formula Form (click the link highlighted in yellow as shown in the screenshot below).

QAS™ Self Study

- Descriptive Promotional Material
- Certificate of Completion
- Course Evaluation Instructions & Templates
- Program List Template
- Program List Instructions
- Administrative Policies
- Pilot Test Form
- Word Count Formula Form
- Program Content Development Policies Instructions & Examples
- QAS™ Self Study Checklist

*For more information about the word count formula, follow this direct link to the Registry website and click on the drop down titled, "Word Count Formula: Background."

☐ Archived Group Internet Based Program:
*Note: Applicants must already be approved on the Registry for the Group Internet Based delivery method in order to use this as a basis for a QAS™ Self-Study program.
      ☐ The credits have been based on the CPE credits awarded to the original presentation.
      ☐ An original compliant CPE certificate for the archived group internet based course will be provided as proof of CPE determination.
      ☐ The following are the same for the group internet based course as the submitted QAS™ SS course:
            ☐ Program/Course Title
            ☐ Field of Study
      ☐ The original course is listed on the program list.
      ☐ The credits were rounded down to the nearest one-fifth, one-half, or whole credit.

☐ Archived Group Live Program:
*Note: Applicants must already be approved on the Registry for the Group Live delivery method in order to use this as a basis for a QAS™ Self-Study program.

    ☐ The credits have been based on the CPE credits awarded to the original presentation.

    ☐ An original compliant CPE certificate for the archived group live course will be provided as proof of CPE determination.

    ☐ The following are the same for the group live course and the submitted QAS™ SS course:

        ☐ Program Course Title
        ☐ Field of Study

    ☐ The original course is listed on the program list.

    ☐ The credits were rounded down to the nearest one-fifth, one-half, or whole credit.

Administrative Checklist

<table>
<tr><td colspan="2">☐ The Statement of Administrative Policies includes the following elements:
*Note that the administrative policies should be applicable to all courses and not solely specific to the course submitted for review.</td></tr>
<tr><td colspan="2">* Visit the Registry <u>website</u> for QAS™ Self Study Templates or go directly to the following link for further details concerning these guidelines: <u>Administrative Policies</u></td></tr>
<tr><td>☐</td><td>Record Retention Policy (Stds. 2.3 & 24)</td></tr>
<tr><td>☐</td><td>Refund Policy

*Even if your course does not require a fee, there should still be a statement stating so in the administrative policies. This cannot just be, "There are no refunds."</td></tr>
<tr><td>☐</td><td>Program Cancellation Policy
*Though QAS™ Self Study courses are not live, there must still be a statement explaining how the participant would be contacted in the event that a course is no longer available.</td></tr>
<tr><td>☐</td><td>Complaint Resolution Policy</td></tr>
<tr><td>☐</td><td>Course Update Policy (Std. 4)</td></tr>
<tr><td colspan="2">☐ The Program Content Development includes the following elements:
Standards for CPE Program Measurement, Standard No. 2-5
*Note that the program content development should be applicable to all courses and not solely specific to the course submitted for review.</td></tr>
<tr><td colspan="2">* Visit the Registry <u>website</u> for QAS™ Self Study Templates or go directly to the following link for further details concerning these guidelines: <u>Content Development Policies Guidance</u></td></tr>
<tr><td>☐</td><td>Program Content & Knowledge Level Policy</td></tr>
<tr><td>☐</td><td>Content Development Policy</td></tr>
<tr><td>☐</td><td>Content Review Policy</td></tr>
<tr><td>☐</td><td>Learning Objectives Policy</td></tr>
</table>

☐ **The Course/Program List includes the following components:**
The course/program list should include all programs which you plan to offer in the year following your QAS™ Self Study application approval. The CPE credit range represented on the course/program list should match the chosen range selected with your application fee. Following your approval, if you decide to offer more courses than those listed in the course/program list, contact your NASBA Registry account manager in order to seek compliance with this adjustment.

*Visit the Registry website for QAS™ Self Study Templates to locate the Program List Instructions and the Program List Template which can be used to enter your program offerings (click the link highlighted in yellow as shown in the screenshot below).

QAS™ Self Study

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*For an extensive breakdown of Fields of Study, visit our website or go to this direct link: Fields of Study Document
*For best practices about Fields of Study, follow this direct link to the Registry website and click on the drop down titled, "Field of Study Classification."

☐	Program/Course Title: This should include the course in review and the title should match that which was listed in the application.
☐	Delivery Method
☐	CPE Credits
☐	Field of Study
☐	Date: For initial/ADM applications, the QAS™ Self-Study course date is the date on which the course becomes available for enrollment. If the course is not yet available at the time of application, it is permissible to put TBD in this section of the program list. For QAS™ Self-Study renewal applications, the date is the beginning date of the renewal period.

☐ Promotional Materials contain the following components:
Promotional materials should be an example of what would be given to a prospective learner for the course submitted for review.
Standards for CPE Program Measurement, Standard No. 12

*Visit the Registry [website](#) for QAS™ Self Study Templates or go directly to the following link: [Descriptive/Promotional Materials Instructions](#)

*For best practices about promotional materials, follow this [direct link](#) to the Registry website and click on the drop down titled, "Course Announcement/Promotional Materials."

*For best practices about knowledge level, follow this [direct link](#) to the Registry website and click on the drop down titled, "Program Knowledge Level and Prerequisite Education and Experience."

☐	INTERNAL Audience:
	☐ Learning Objectives
	☐ Type of delivery method *This must say, "QAS™ Self Study," in its entirety.
	☐ Prerequisites (or none)
	☐ Advance preparation (or none)
	☐ Recommended CPE credit
	☐ Field of study
	☐ Program description (for optional internal course): The title of the course should match that which was listed in the application.
	☐ Program/Knowledge level (for optional internal course): A Note about Knowledge Level In general, intermediate, advanced, and update courses are building upon previous knowledge and information. The previous education or experience in which these courses build upon would be the course prerequisites and should be stated clearly for participants. Typically, basic and overview courses do not assume previous knowledge of the subject and should develop all concepts fully. Although these courses will not typically have prerequisite knowledge or experience in the subject matter, these levels may have prerequisites if there is assumed knowledge in another subject.
	☐ Basic
	☐ Intermediate
	☐ Advanced
	☐ Overview
	☒ Update

☐	☐ EXTERNAL Audience:
	☐ Learning Objectives
	☐ Program description: The title of the course should match that which was listed in the application.
	☐ Prerequisites (or none)
	☐ Advance prep (or none)
	☐ Type of delivery method *This must say, "QAS™ Self Study," in its entirety.
	☐ Recommended CPE credit
	☐ Field of study
	☐ Program Registration Requirements *This can be a link to the registration page if desired. If this method is chosen, be sure that the link works properly. *If the course does not require the learner to register, there should be instructions given on how the learner can access the course.
	☐ Refund Policy
	☐ Complaint Resolution Policy
	☐ National Registry Language This statement must be present in its entirety and without any alteration: "(Sponsor name here) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org"

	☐ Program/Knowledge level of the course: A Note about Knowledge Level In general, intermediate, advanced, and update courses are building upon previous knowledge and information. The previous education or experience in which these courses build upon would be the course prerequisites and should be stated clearly for participants. Typically, basic and overview courses do not assume previous knowledge of the subject and should develop all concepts fully. Although these courses will not typically have prerequisite knowledge or experience in the subject matter, these levels may have prerequisites if there is assumed knowledge in another subject.
	☐ Basic
	☐ Intermediate
	☐ Advanced
	☐ Overview
	☐ Update

☐ The Evaluation Form contains the following components with wording as close as possible or verbatim to the following:
Standards for CPE Program Measurement, Standard No. 14

*Visit the Registry website for QAS™ Self Study Templates or go directly to the following link for guidelines and an example: Course Evaluation Instructions

*For best practices about the evaluation form, follow this direct link to the Registry website and click on the drop down titled, "Course Evaluations."

☐	The stated learning objectives were met
☐	The stated prerequisite requirements were appropriate and sufficient.
☐	The program materials, including the qualified assessment, if any, were relevant & contributed to the achievement of the learning objectives.
☐	The time allotted to the learning activity was appropriate.

☐ **The Certificate of Completion contains the following components:**
*The certificate should be an example of what the learner will receive after completing the specific course in review.
Standards for CPE Program Measurement, Standard 23

*Visit the Registry website for QAS™ Self Study Templates or go directly to the following link for guidelines and an example: Certificate of Completion

*For best practices about the certificate of completion, follow this direct link to the Registry website and click on the drop down titled, "Certificate of Completion." (click the link highlighted in yellow as shown in the screenshot below).

QAS™ Self Study

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☐	CPE program sponsor name *The sponsor name should match exactly the name given on the application.
☐	Sponsor contact information *Changes made and implemented in the 2024 Standards no longer require this component. It is optional.
☐	Participant's name
☐	Program/Course Title *Make sure the program title matches that of the course in review.

☐	Program Field of Study *If the course is being classified in more than one field of study, this must be broken down to show the number of CPE credits being awarded in each field of study. The total CPE credits given for the course should equal the sum of this breakdown. For example: Taxes: 1 CPE credit Specialized Knowledge: 1 CPE credit Total: 2 CPE credits
☐	Date Offered
☐	Delivery Method: This should state that the Delivery Method is QAS™ Self-Study.
☐	CPE Credit *This must be an exact amount of CPE credits and not a range. It must also match the CPE credit methodology submitted. Example of Noncompliant CPE Credit: up to 7 CPE credits Example of Compliant CPE Credit: 7 CPE credits
☐	Registry ID # *If this is an initial application and you are not a current sponsor with a Registry ID, you can just place this title on the certificate to mark where it will go upon and following your approval.
☐	Registry Time Statement * This statement must be present in its entirety and without any alteration: "In accordance with the Standards of the National Registry of CPE Sponsors, CPE credits have been granted on a 50-minute hour."
☐	Signature *Changes made and implemented in the 2024 Standards no longer require this component. It is optional.

☐ **The Bio/Resume of Instructors/Author & Content Reviewer** *In addition to typical information included in the bios, applicants should also provide specific information regarding the following guidelines: *Standards for CPE Program Measurement, Standards 5 & 24*	
*For best practices about instructor/author/reviewer requirements, follow this direct link to the Registry website and click on the drop down titled, "Programs Designated as Accounting, Auditing or Taxes."	
☐	The instructor/author/developer is a CPA (required for Fields of Study in accounting or auditing).
☐	The instructor/author/developer or reviewer is a CPA (for the Field of Study of Taxes, this can also be an enrolled tax agent or tax attorney).
☐	The instructor/author/developer is qualified in the subject matter.
☐	The instructor/author/developer is qualified in self-study instructional strategies. *This is proven by expertise demonstrated through practical experience or education. The bio should include an explanation of applicable experience that the individual has with instructing/educating other individuals.
☐	The content reviewer is independent of the course development team.
☐	The content reviewer is qualified in the subject matter.