

CHAPTER EDUCATION OFFERINGS

NASBA Requirements for Group Live Events

The following information provides chapters with the requirements to offer CPE credits for chapter events that are being held in person with presenter in person or where the attendees are in person and the presenters are provided virtually. Please ensure that you are following these standards for all chapter events. It is the responsibility of the chapter to ensure the below information is met prior to events. Failure to comply with the below standards may result in your event not receiving any or full CPE credits.

➤ **Group Live:** IN PERSON EVENTS

- Event title
- Event description
- Three learning objectives for every 50 minutes of content presentation
- Bio and Headshot for all speakers.
 - Ethics speaker bios must include relevant experience or training.
 - Accounting & Auditing credits require at least one licensed CPA who is active in the development or review.
 - Taxes require one licensed CPA, tax attorney or IRS enrolled agent in development or review.
- Handouts (if any other than presentation all in PDF format, if provided they need to be listed in presentation as index)
 - Presentation required with polling questions.
 - Index included in presentation if providing handouts.
 - Overview of Topics slide in presentation
 - Glossary of Terms slide in presentation.
- All sessions must be reviewed by someone not involved in development of content to ensure the program is technically accurate, current, correct field of study and addresses the stated learning objectives. **Use required review form to comply.**
- Session attendees must complete a session sign-in sheet.
- Session Presenter must sign the sign in sheet attesting attendees stayed for the full duration of session.
- Session attendees must complete a session attendance verification form for IASA national office.
- Session overall evaluations must be completed.
- Attendees are required to attend the full session to receive CPE credit.
- Marketing materials or event website must include:
 - Event Title
 - Event Date and Time
 - Event & Session Descriptions
 - Learning Objectives (Recognize, Identify & Differentiate or Define as required by NASBA)
 - Field of Study
 - Delivery Method



- Program level (Basic, Intermediate or Advanced)
- Prerequisites (For Intermediate or Advanced)
- Advance Preparation (For Intermediate or Advanced)
- NASBA logo and statement or link to logo and statement
- # of credits that may be earned
- Registration instructions
- Refund Policy
- Complaint resolution