



# 2014 National Registry Summit

Nashville, TN September 17 - 19

## LOOKING TO THE FUTURE



**Welcome to the 2014 NASBA  
National Registry Summit**

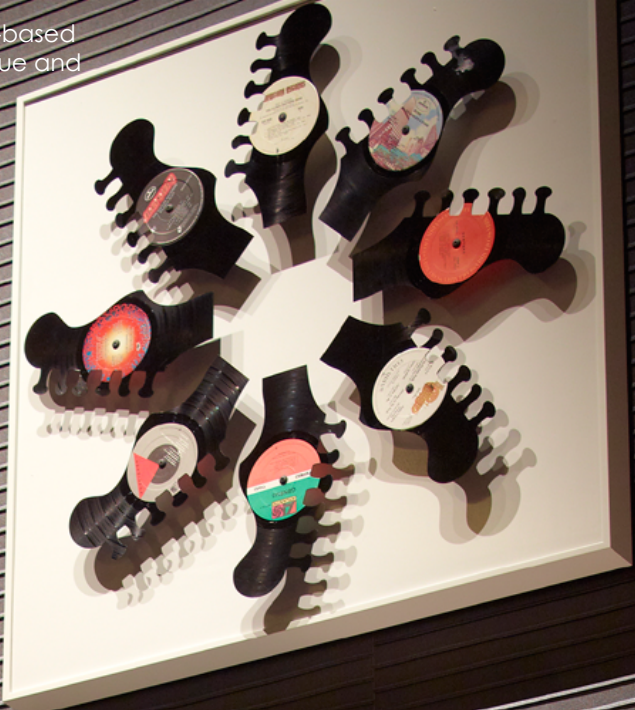


## TABLE OF CONTENTS

- [Agenda](#)
  - [Wednesday](#)
  - [Thursday](#)
  - [Friday](#)
- [Registration List](#)
  - [By Name](#)
  - [By Organization](#)
- [Speaker Bios](#)
- [Presentations](#)
  - [Rules of Play](#)
  - [Overview of the Working Group Draft of the Revised Standards](#)
  - [LearningMarket.org](#)
  - [Sharing Innovative Delivery Method Ideas](#)



The Omni Nashville Hotel contains an extensive collection of art drawn from Tennessee-based artists. The work, inspired by the musical history and culture of Nashville, creates a unique and inviting atmosphere for your stay during the 2014 National Registry Summit.





# Agenda

## Wednesday, September 17, 2014

2:30 pm - 4:30 pm

### [Pre-Conference Workshop: Registry 101 - Legends Ballroom B](#)

*Jeanetta Cothron, Regulatory Compliance Auditor*

*Cynthia Woodlee, National Registry Administrator*

This workshop will provide an overview of the Registry and the Statement on Standards for Continuing Professional Education (CPE) Programs (Standards). It will provide details on the more significant processes of the Registry: the initial or additional delivery method applications; the renewal process; and the desk audit process. The workshop will describe the instructional delivery methods addressed by the Standards and focus on the significant aspects of development, presentation, measurement and reporting of each method. The workshop will also highlight the most common areas of non-compliance with the Registry and the Standards, so that appropriate procedures can be put in place to ensure compliance.

2:30 pm - 4:30 pm

### [Pre-Conference Workshop: Learning Objectives - Tips for Developing Compliant Learning Objectives - Legends Ballroom A](#)

*Johnny Owsley, Instructional Design Administrator*

*Miki Klein, Instructional Design Administrator*

This workshop will provide guidance on how to develop learning objectives that are compliant with the Standards. A common deficiency noted in most application and/or desk audit reviews involves the course learning objectives. Do the learning objectives clearly articulate the knowledge, skills and abilities that can be achieved by the participants in the learning activities? The workshop will also offer best practices specifically in the development of self-study program learning objectives to ensure those objectives can be assessed at the end of the course.

4:30 pm - 6:00 pm

### [Registration - Legends Ballroom Pre-Function Area](#)

No planned evening activity. Opportunity to meet up with your network of colleagues and enjoy the downtown Nashville area.



# Agenda

## Thursday, September 18, 2014

- 7:30 am - 8:30 am      *Breakfast - Legends Ballroom B/C*
- 8:30 am - 8:45 am      *Welcome Message - Legends Ballroom D*  
*Ken Bishop, NASBA, President & CEO*  
A NASBA welcome informing participants of current focus and projects.
- 8:45 am - 10:15 am      *Keynote Address: Rules of Play: Using Games and Gamification to Drive Engagement - Legends Ballroom D*  
*Karl M. Kapp, Ed.D., CFPIM, CIRM*  
Karl Kapp, Professor at Bloomsburg University, will provide an interactive presentation modeling activities that can be used in the classroom to engage learners. The goal is to provide an overview of how games, game elements and game design can drive the learners toward greater understanding, retention and learning through interactive classroom activities.
- Come prepared to participate in interactive games and learn how to apply games and gamification to the instructional process!
- 10:15 am - 10:30 am      *Break - Legends Ballroom B/C*
- 10:30 am - 11:15 am      *Statement on Standards for CPE Programs: Overview of the Working Draft of the Revised Standards - Legends Ballroom D*  
*Jessica Luttrull, Associate Director, National Registry*  
*Panel of CPE Working Group Members*  
Members of the NASBA CPE Standards Working Group will provide insights as to the process for reviewing and evaluating revisions and modifications to the Standards. The panel will highlight some of the more significant areas of change in the current working draft of the revised Standards.



# Agenda

## Thursday, September 18, 2014

11:15 am - 11:45 am

### Learning Objectives: Refresher - Legends Ballroom D

*Johnny Owsley, Instructional Design Administrator*

*Miki Klein, Instructional Design Administrator*

This session will briefly summarize some of the topics covered in the pre-conference workshop related to developing learning objectives that are compliant with the *Standards*, as this is a common deficiency noted in most application and/or desk audit reviews.

11:45 am - 1:00 pm

### Lunch - Legends Ballroom B/C

1:00 pm - 3:45 pm

Back by popular demand, the breakout sessions provide the opportunity to network with colleagues and share knowledge and ideas. The breakout sessions will be moderated by members of the NASBA CPE Standards Working Group. The Working Group will receive your feedback and input regarding the current working draft of the revisions to the Standards, which will be provided to those who register to attend the Summit. There will be two opportunities to provide feedback on the working draft.

The first break-out session will be divided into the following groups: (1) Instructional Design/Content Development; (2) Self Study; and (3) Group Programs.

The second break-out session will be divided into the following groups: (1) Small to Mid-size Firms/Events; (2) External Vendors; (3) Large Firms/Events and In-House

Session I  
1:00 pm - 2:15 pm

### Standards Working Draft Break-Out Session

- 1) Instructional Design - Legends Ballroom B
- 2) Self Study - Legends Ballroom C
- 3) Group Programs - Legends Ballroom D



# Agenda

## Thursday, September 18, 2014

2:15 pm - 2:30 pm

Session 2  
2:30 pm - 3:45 pm

Break

### Standards Working Draft Break-Out Session

- 1) Small to Mid-Size Firms/Events - *Legends Ballroom B*
- 2) External Vendors - *Legends Ballroom C*
- 3) Large Firms/Events and In-House - *Legends Ballroom D*

3:45 pm - 4:00 pm

Break

4:00 pm - 4:30 pm

### LearningMarket.org - The One-Stop Shop for the National Registry - *Legends Ballroom D*

*Courtney Stevens, Salesforce Administrator*

This session will provide an overview of the content of LearningMarket.org, the website for the National Registry. Participants will learn where to find applications, forms and templates as well as access the Standards and the Best Practices pages. The presentation will also provide tips in developing and maximizing your organization's profile page, which is a free benefit of membership on the National Registry.

5:00 pm - 7:00 pm

### Celebration Reception - *Legends Ballroom B/C*

## Friday, September 19, 2014

7:30 am - 8:30 am

### Breakfast - *Legends Ballroom B/C*

8:30 am - 9:00 am

### Debrief: Interactive Working Draft Discussion - *Legends Ballroom D*

*Jessica Luttrull, Associate Director, National Registry  
and Moderators from Break-Out Sessions*

Moderators from the NASBA CPE Standards Working Group will summarize some of the comments and feedback on the current working draft of the revisions to the *Standards* from the break-out sessions on Thursday.





# Agenda

## Friday, September 19, 2014

9:00 am - 10:30 am

[Keynote Address: Making Learning Effective and Efficient through the Combination of Game Mechanics and Social Tools - Legends Ballroom D](#)

*Krishna Depura, MindTickle!*

Krishna Depura will demonstrate the MindTickle platform which enables businesses, trainers and individuals to transform their existing online content into an interactive learning experience. MindTickle engages the learner and makes learning efficient and effective through a unique combination of game mechanics (points, medals, badges and leaderboard) and social tools (profiles, comments, chat and walls).

This will be a hands-on, interactive session sure to bring out the competitive spirit in all!

10:30 am - 10:45 am

[Break](#)

10:45 am - 12:15 pm

[Panel: Sharing Innovative Delivery Method Ideas - Legends Ballroom D](#)

*Eric Dingler, Deloitte*

*Rita Sehgal and Pamela Weeks, Ernst & Young*

*Mary Kate Head, CliftonLarsonAllen*

The trends and technology in the learning arena are changing rapidly and the manner and format preferences of learners is changing in response to the multi-generational CPA population. This session will be comprised of a panel of CPE providers who are exploring, piloting or using innovative delivery methods for CPE training. This will be an opportunity to share knowledge, ideas and pitfalls in considering innovations in learning.

12:15 pm

[Closing Remarks and Boxed Lunches - Legends Ballroom D](#)



## Registration List

### By Last Name

Aguirre, Terra  
Arena, Jenny  
Beier, Ken  
Bialek, Erika  
Booth, Alexis  
Brawner, Mary Ann  
Brown, Cathleen  
Brown, Brandi  
Butler, Lynn

Caceres-Camilla, Claudia  
Campbell, Rebecca  
Cantu, Roel

Ceo, Melanie  
Cole, Greg  
Conaway, Jamie

Conley, Teresa  
Conn, Tiffany  
Cook, Ryan  
Cullings, Deborah  
Cure, Jeanne

Davis, Amanda  
DeAlwis, Jen  
Denor, Gerald

DeRitis, Julie  
Dingler, Eric

CapinCrouse, LLP  
BDO USA, LLP  
Multistate Tax Commission  
Marcum LLP  
CPE Link  
The Rainmaker Companies  
Learning.net  
Pacific Life Insurance Company  
Southern Assoc. of College &  
University Business Officers  
PricewaterhouseCoopers LLP  
Colorado Society of CPAs  
Texas State Board of Public  
Accountancy  
Plante & Moran, LLC  
BKD, LLP  
Public Company Accounting Oversight  
Board  
Skoda Minotti  
USDA OIG Audit  
Missouri State Board of Accountancy  
MetLife  
National Association of College and  
University Business Officers  
North Carolina Association of CPAs  
Wells Fargo Treasury Management  
Wisconsin Accounting Examining  
Board  
LearnLive Technologies  
Deloitte LLP



Nashville's new convention complex, Music City Center, opened in 2013. It is committed to LEED Silver Certification and boasts a four acre green roof composed of 14 different kinds of vegetation. Photo courtesy of Rebecca Gebhardt



## Registration List



### By Last Name, continued

Dougherty, Regina

Eagen, Jim  
Eggers, Heather  
Eyolfson, Todd  
Fay, Robert  
Fingerhut, Jack  
Fizer, Andrea  
Floyd, Brad  
Folcarelli, Brian  
Foster, Jennifer  
Fragnito, Geno  
Frederick, Amy  
Gamel, Scott  
Gantnier, Liz  
Gavin, Tom  
Gentry, Melinda  
Godfrey, Ruth  
Goldman, Josh  
Gornick, Joseph  
Gottfried, Jim  
Gowdy, Kaitlyn  
Grant, Michael  
Gring, Dennis  
Haas, Melissa  
Haddon, Margie  
Halpern, Mary  
Hardenburg, Jim  
Harlan, Jennifer  
Head, Mary Kate  
Hefty, Gwen  
Heiney, Terry  
Helstrom, Joseph  
Heringlake, Lisa  
Hessling, Cindy  
Hill, Lakeisha

Treasury Inspector General for Tax Administration  
Institute of Internal Auditors, Inc.  
Baker Tilly Virchow Krause, LLP  
CaseWare International, Inc.  
Accountancy Board of Ohio  
SmartPros Ltd  
Strafford Publications, Inc.  
Tennessee Society of CPAs  
Ally Financial Inc.  
PDC Energy  
Minnesota Society of CPAs  
Grant Thornton, LLP  
Wolters Kluwer, CCH  
Maryland State Board of Public Accountancy  
Abacus-AT-e2, L.L.C.  
APlusCPE®, a service of WebCE®  
CA Tax Education Council  
The Ohio Society of CPAs  
Wolters Kluwer, CCH  
Accountancy Board of Ohio  
DirectorCorps, Inc.  
AICPA  
Maryland State Board of Public Accountancy  
Public Company Accounting Oversight Board  
The CPE Store  
Maryland Association of CPAs  
New Jersey Society of CPAs  
Column5 Consulting  
CliftonLarsonAllen LLP  
Wolters Kluwer, CCH  
Learning.net  
CFO Resources LLC dba CPASelfstudy.com  
Thomson Reuters  
Crowe Horwath LLP  
Strafford Publications, Inc.



## Registration List

### By Last Name, continued

Hodges, Amelia  
Hopkins, Beth  
Hornbuckle, April  
Howard, Russ  
Hubbard, Brenda  
Jaramillo, Maria  
Johnson, Kevin  
Junge, Kathryn  
King, Dan  
Kolstein, Zachary  
Kress, Lori  
LaMunyon-Jones, MaryBeth  
Laney, Cara  
Lange, Susan  
Leahy, Elizabeth  
Lenz, Danielle  
Leon, Martha  
Lethcoe, Gwynne  
Levine, Robert  
Lewis, Kara  
Lowry, Sean  
Maas, Brenna  
Mackey, Lisa  
Maddox, Tammy  
Makray, Laura  
Marquinez, Caroline  
Mawyer, Amy  
McCarthy, Patricia  
McGowan, Janet  
McKeever, Jason  
Medley, Carl

North Carolina Association of CPAs  
PricewaterhouseCoopers LLP  
Health Care Service Corporation  
SkillSoft Corporation  
Florida Institute of CPAs  
IRS Communications and Liaison  
Association of Government Accountants  
BB&T Audit Services  
EisnerAmper LLP  
Micron Systems  
Institute of Internal Auditors  
CA Tax Education Council  
MS Consultants, LLC  
PricewaterhouseCoopers LLP  
Merck & Co., Inc.  
CHAN Healthcare Auditors, LLC  
American Management Association  
Idaho Society of CPAs  
EisnerAmper LLP  
Oregon Society of CPAs  
CGI  
Spidell Publishing, Inc.  
Spidell Publishing, Inc.  
PricewaterhouseCoopers LLP  
U.S. DOL, Office of Inspector General  
Kaufman, Rossin & Co.  
Virginia Society Of CPAs  
CFO Resources LLC dba CPASelfstudy.com  
Management Concepts Inc.  
Eide Bailly LLP  
IRS Communications and Liaison

Miller, Tie  
Motas, Paula  
Murphy, John  
Murphy, Erin  
Myers, Heather  
Newsom-McCurdy, Linda  
Nicholson, Francis  
Ottiger, Andrew  
Panek, Michelle  
Partlow, Joshua  
Patriarca, Jody  
Pemble, Caitlin  
Petty, Margaret  
Pittioni, Martin  
Pribbernow, Jody  
Ramos, Michael  
Ramsay, Gennifer  
Reams, Lee  
Risko, Kathleen  
Rosso, Clar  
Santora, Jaime  
Schwartz, Andrea  
Sehgal, Rita  
Sharp, Christine  
Slusser, Janice  
Smith, Lynn  
Spencer, Beth  
Squier, Ashley  
Steinwedel, Sandy  
  
Thiemann, Sue

AICPA  
CPE Link  
Thomson Reuters  
Western CPE  
Nebraska State Board of Public Accountancy  
Virginia Society Of CPAs  
Institute of Internal Auditors, Inc.  
Practising Law Institute  
National Society of Accountants  
Vermont Board of Public Accountancy  
KPMG LLP  
Guardian Life Insurance Company of America  
Wilkes University  
Oregon Board of Accountancy  
LeBow College of Business  
Ramos & Company  
BKD, LLP  
ClientWwhys, Inc.  
The Center for Professional Education, Inc.  
AICPA  
KPMG LLP  
KPMG LLP  
Ernst & Young LLP  
Tennessee Society of CPAs  
California Society of CPAs  
Idaho State Board of Accountancy  
CliftonLarsonAllen LLP  
North Carolina Association of CPAs  
Maryland Society of Accounting and Tax  
Professionals, Inc  
Boomer Consulting Inc.



# Registration List

## By Last Name, continued

Thomas, Ralph	New Jersey Society of CPAs
Thompson, Elizabeth	Merrill Corporation
Thompson, Kelly	MS Consultants, LLC
Tims, Becky	BKD, LLP
Tostevin, Elaine	SkillSoft Corporation
Tross, Nina	National Society of Tax Professionals
Turner, Danielle	Plante & Moran, LLC
Vallad, Lisa S.	University of Colorado
Vazquez, Yasmin	Association of Certified Fraud Examiners
Wahlen, Maurine	General Conference Auditing Service
Weeks, Pamela	Ernst & Young LLP
Wells, Denise	Johnson Lambert LLP
Wendt, Valerie	Bisk CPEasy
White, Monique	Lenovo Internal Audit
Williams, Hayden	Washington Society of CPAs
Willis, Martha	Gleim Publications, Inc.
Wright, Kathy	Jennings Advisory Group, LLC
Yates, Jean	PNC Corporate Audit
Zaman, Phil	CBIZ MHM, LLC
Zieman, Ricki	APlusCPE®, a service of WebCE®
Zizwarek, Debbie	Maryland Association of CPAs

Baker, Ashlee	NASBA
Bishop, Ken	NASBA
Bryant, Michael	NASBA
Caldwell, Maria	NASBA
Cothron, Jeanetta	NASBA
Hill, Steve	NASBA
Kenny, Tom	NASBA
Klein, Miki	NASBA
Lane, Lindsay	NASBA

Layton, Angela	NASBA
Luttrull, Jessica	NASBA
Owsley, Johnny	NASBA
Price, Jeff	NASBA
Raymer, Caleb	NASBA
Stevens, Courtney	NASBA
Thayer, Gina	NASBA
Thompson, Jill	NASBA
Turner, Kathryn	NASBA
Williams, Terri	NASBA
Woodlee, Cynthia	NASBA

The Tennessee State Capitol Building is one of Nashville's most prominent examples of Greek Revival architecture. Both the interior and the exterior are built with limestone from a quarry about a mile from the site.



Vanderbilt University is a private research university and medical center offering a full-range of undergraduate, graduate and professional degrees.





# Registration List

## By Organization

APlusCPE®, a service of WebCE®  
APlusCPE®, a service of WebCE®  
Abacus-AT-e2, L.L.C.  
Accountancy Board of Ohio  
Accountancy Board of Ohio  
AICPA  
AICPA  
AICPA  
Ally Financial Inc.  
American Management Association  
Association of Certified Fraud Examiners  
Association of Government Accountants  
Baker Tilly Virchow Krause, LLP  
BB&T Audit Services  
BDO USA, LLP  
Bisk CPEasy  
BKD, LLP  
BKD, LLP  
BKD, LLP  
Boomer Consulting Inc.  
CA Tax Education Council  
CA Tax Education Council  
California Society of CPAs  
Capin Crouse, LLP  
CaseWare International, Inc.  
CBIZ MHM, LLC  
CFO Resources LLC dba CPASelfstudy.com  
CFO Resources LLC dba CPASelfstudy.com  
CGI  
CHAN Healthcare Auditors, LLC

Gentry, Melinda  
Zieman, Ricki  
Gavin, Tom  
Fay, Robert  
Gottfried, Jim  
Grant, Michael  
Miller, Tie  
Rosso, Clar  
Folcarelli, Brian  
Leon, Martha  
Vazquez, Yasmin  
Johnson, Kevin  
Eggers, Heather  
Junge, Kathryn  
Arena, Jenny  
Wendt, Valerie  
Cole, Greg  
Ramsay, Gennifer  
Tims, Becky  
Thiemann, Sue  
Godfrey, Ruth  
LaMunyon-Jones, MaryBeth  
Slusser, Janice  
Aguirre, Terra  
Eyolfson, Todd  
Zaman, Phil  
Helstrom, Joseph  
McCarthy, Patricia  
Lowry, Sean  
Lenz, Danielle



## Registration List

### By Organization, continued

ClientWhys, Inc.  
CliftonLarsonAllen LLP  
CliftonLarsonAllen LLP  
Colorado Society of CPAs  
Column5 Consulting  
CPE Link  
CPE Link  
Crowe Horwath LLP  
Deloitte LLP  
DirectorCorps, Inc.  
Eide Bailly LLP  
EisnerAmper LLP  
EisnerAmper LLP  
Ernst & Young LLP  
Ernst & Young LLP  
Florida Institute of CPAs  
General Conference Auditing Service  
Gleim Publications, Inc.  
Grant Thornton, LLP  
Guardian Life Insurance Company of America  
Health Care Service Corporation  
Idaho Society of CPAs  
Idaho State Board of Accountancy  
Institute of Internal Auditors  
Institute of Internal Auditors, Inc.  
Institute of Internal Auditors, Inc.  
IRS Communications and Liaison  
IRS Communications and Liaison  
Jennings Advisory Group, LLC  
Johnson Lambert LLP

Reams, Lee  
Head, Mary Kate  
Spencer, Beth  
Campbell, Rebecca  
Harlan, Jennifer  
Booth, Alexis  
Motas, Paula  
Hessling, Cindy  
Dingler, Eric  
Gowdy, Kaitlyn  
McKeever, Jason  
King, Dan  
Levine, Robert  
Sehgal, Rita  
Weeks, Pamela  
Hubbard, Brenda  
Wahlen, Maurine  
Willis, Martha  
Frederick, Amy  
Pemble, Caitlin  
Hornbuckle, April  
Lethcoe, Gwynne  
Smith, Lynn  
Kress, Lori  
Eagen, Jim  
Nicholson, Francis  
Jaramillo, Maria  
Medley, Carl  
Wright, Kathy  
Wells, Denise





## Registration List

### By Organization, continued

Kaufman, Rossin & Co.

KPMG LLP

KPMG LLP

KPMG LLP

Learning.net

Learning.net

LearnLive Technologies

LeBow College of Business

Lenovo Internal Audit

Management Concepts Inc.

Marcum LLP

Maryland Association of CPAs

Maryland Association of CPAs

Maryland Society of Accounting and Tax Professionals, Inc

Maryland State Board of Public Accountancy

Maryland State Board of Public Accountancy

Merck & Co., Inc.

Merrill Corporation

MetLife

Micron Systems

Minnesota Society of CPAs

Missouri State Board of Accountancy

MS Consultants, LLC

MS Consultants, LLC

Multistate Tax Commission

NASBA

NASBA

NASBA

NASBA

NASBA

Marquinez, Caroline

Patriarca, Jody

Santora, Jaime

Schwartz, Andrea

Brown, Cathleen

Heiney, Terry

DeRitis, Julie

Pribbernow, Jody

White, Monique

McGowan, Janet

Bialek, Erika

Zizwarek, Debbie

Halpern, Mary

Steinwedel, Sandy

Gantnier, Liz

Gring, Dennis

Leahy, Elizabeth

Thompson, Elizabeth

Cullings, Deborah

Kolstein, Zachary

Fragnito, Geno

Cook, Ryan

Laney, Cara

Thompson, Kelly

Beier, Ken

Baker, Ashlee

Bishop, Ken

Bryant, Michael

Caldwell, Maria

Cothron, Jeanetta



## Registration List

### By Organization, continued

NASBA	Hill, Steve
NASBA	Kenny, Tom
NASBA	Klein, Miki
NASBA	Lane, Lindsay
NASBA	Layton, Angela
NASBA	Luttrull, Jessica
NASBA	Owsley, Johnny
NASBA	Price, Jeff
NASBA	Raymer, Caleb
NASBA	Stevens, Courtney
NASBA	Thayer, Gina
NASBA	Thompson, Jill
NASBA	Turner, Kathryn
NASBA	Williams, Terri
NASBA	Woodlee, Cynthia
National Association of College and University Business Officers	Cure, Jeanne
National Society of Accountants	Panek, Michelle
National Society of Tax Professionals	Tross, Nina
Nebraska State Board of Public Accountancy	Myers, Heather
New Jersey Society of CPAs	Hardenburg, Jim
New Jersey Society of CPAs	Thomas, Ralph
North Carolina Association of CPAs	Hodges, Amelia
North Carolina Association of CPAs	Davis, Amanda
North Carolina Association of CPAs	Squier, Ashley
Oregon Board of Accountancy	Pittioni, Martin
Oregon Society of CPAs	Lewis, Kara
Pacific Life Insurance Company	Brown, Brandi
PDC Energy	Foster, Jennifer
Plante & Moran, LLC	Ceo, Melanie
Plante & Moran, LLC	Turner, Danielle



## Registration List

### By Organization, continued

PNC Corporate Audit  
Practising Law Institute  
PricewaterhouseCoopers LLP  
PricewaterhouseCoopers LLP  
PricewaterhouseCoopers LLP  
PricewaterhouseCoopers LLP  
Public Company Accounting Oversight Board  
Public Company Accounting Oversight Board  
Ramos & Company  
SkillSoft Corporation  
SkillSoft Corporation  
Skoda Minotti  
SmartPros Ltd  
Southern Assoc. of College & University Business Officers  
Spidell Publishing, Inc.  
Spidell Publishing, Inc.  
Strafford Publications, Inc.  
Strafford Publications, Inc.  
Tennessee Society of CPAs  
Tennessee Society of CPAs  
Texas State Board of Public Accountancy  
The Center for Professional Education, Inc.  
The CPE Store  
The Ohio Society of CPAs  
The Rainmaker Companies  
Thomson Reuters  
Thomson Reuters  
Treasury Inspector General for Tax Administration  
U.S. DOL, Office of Inspector General  
University of Colorado

Yates, Jean  
Ottiger, Andrew  
Caceres-Camilla, Claudia  
Hopkins, Beth  
Lange, Susan  
Maddox, Tammy  
Conaway, Jamie  
Haas, Melissa  
Ramos, Michael  
Howard, Russ  
Tostevin, Elaine  
Conley, Teresa  
Fingerhut, Jack  
Butler, Lynn  
Maas, Brenna  
Mackey, Lisa  
Fizer, Andrea  
Hill, Lakeisha  
Floyd, Brad  
Sharp, Christine  
Cantu, Roel  
Risko, Kathleen  
Haddon, Margie  
Goldman, Josh  
Brawner, Mary Ann  
Heringlake, Lisa  
Murphy, John  
Dougherty, Regina  
Makray, Laura  
Vallad, Lisa S.



## Registration List

### By Organization, continued

USDA OIG Audit  
Vermont Board of Public Accountancy  
Virginia Society Of CPAs  
Virginia Society Of CPAs  
Washington Society of CPAs  
Wells Fargo Treasury Management  
Western CPE  
Wilkes University  
Wisconsin Accounting Examining Board  
Wolters Kluwer, CCH  
Wolters Kluwer, CCH  
Wolters Kluwer, CCH

Conn, Tiffany  
Partlow, Joshua  
Mawyer, Amy  
Newsom-McCurdy, Linda  
Williams, Hayden  
DeAlwis, Jen  
Murphy, Erin  
Petty, Margaret  
Denor, Gerald  
Gamel, Scott  
Gornick, Joseph  
Hefty, Gwen

rev. 09/09/14



## Speaker Bios

### Rules of Play: Using Games and Gamification to Drive Engagement

Karl M. Kapp is a scholar, writer and expert on the convergence of learning, technology and business operations.



He is a full professor of instructional technology at Bloomsburg University and serves as the Assistant Director of Bloomsburg's Institute for Interactive Technologies. He is author of six books including the bestselling learning book "The Gamification of Learning and Instruction." Karl has been called a "Rock Star" of eLearning by eLearn Magazine and in 2007 was named one of the Top 20 Most Influential Training Professionals by

TrainingIndustry, Inc. Karl is quoted in several volumes of Jeannie Novak's "Game Development Essentials" series. He blogs at the popular "Kapp Notes" web site and is a frequent international keynote speaker, workshop leader, moderator, and panelist. He also speaks to private corporations and universities. He has spoken in Canada, France, The United Kingdom, Mexico, Singapore, Finland and Bermuda.



Bridgestone Arena, an all-purpose venue in downtown Nashville, is the home of professional hockey team, The Nashville Predators.



This delicate, music-themed chandelier graces the lobby of the Omni Nashville Hotel.

## Making Learning Effective and Efficient through the Combination of Game Mechanics and Social Tools



Krishna Depura is a graduate from IIT Roorkee and ISB Hyderabad. He has been a passionate startup guy, and has worked in three successful startups - Tejas Networks, Infinera and PubMatic. Over the past 10 years he has worked in a variety of roles and has taken several products to market successfully. At ISB, Krishna was awarded "ISB Young Leader Award", the highest honor for his exceptional leadership and contribution.

Situated downtown among Nashville's growing number of glistening high-rises, the historic Ryman Auditorium maintains its rich entertainment history and reputation as a well-seasoned performance hall with some of the finest acoustics in the world.





**Rules of Play: Using Games and  
Gamification to Drive Engagement**  
Karl M. Kapp





## Presentation Slides





## Presentation Slides

**[Click here to access additional  
conference materials from Karl Kapp](#)**



**Standards: Overview of the  
Working Draft Session**  
Members of CPE Standards Working Group



# NASBA

National Association of State Boards of Accountancy

## Overview of the Working Draft of the Revised Standards

Moderator: *Greg Cole, BKD, LLP*

Panelists:

*Terry Heiney, Learning.net*

*Beth Hopkins, PricewaterhouseCoopers*

*Valerie Wendt, Thomson Reuters – BISK CPEasy*





## Topics

- The Process of Review and Evaluation
- The CPE Standards Working Group
- Overview – Draft of Revised Standards with panel discussion





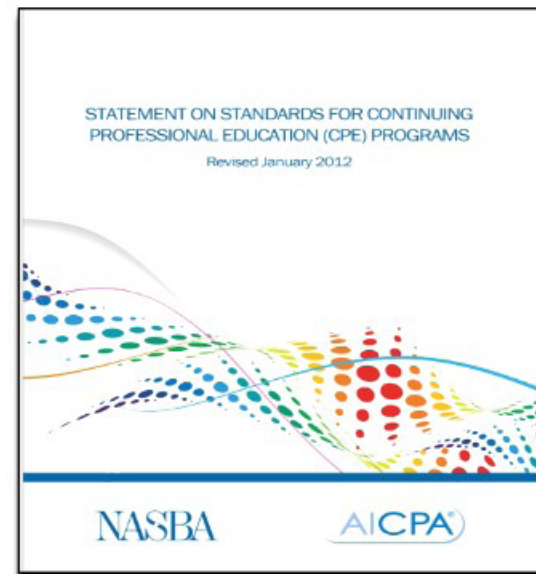
# NASBA

National Association of State Boards of Accountancy

## The Process of Review and Evaluation

The Standards were last revised January 2012.

Procedures were put in place such that the Standards will be reviewed and evaluated every 2 years.





## The Process of Review and Evaluation

### 2014 – Year of Review and Evaluation

- The process has followed the 2012 revision process:
  - The Standards have been reviewed and evaluated by the CPE Standards Working Group
  - The Working Group will present its recommendation to NASBA's CPE Committee which will then present its recommendation to a Joint CPE Standards Committee made up of representatives from the AICPA and NASBA
  - The respective Boards will review and approve any recommended revisions from the Joint Committee which will then be available for public comment





### The Process of Review and Evaluation

- The following were reviewed and considered by the Working Group:
  - The 2012 Standards in their entirety
  - Topics discussed during quarterly conference calls of the Working Group in 2012 and 2013
  - Topics discussed during the break-out sessions at the 2013 National Registry Summit in Houston, TX
  - Comments submitted at the 2014 Spring EDMAX meeting
  - Comments submitted throughout the 2013-2014 period by Registry sponsors and others







# The CPE Standards Working Group

- Comprised of 13 members representing the stakeholders in CPE.
- Members have experience in:
  - development of group live, self study and group internet based courses
  - instructional design of courses
  - development of education for internal use
  - development of technical courses
  - higher education (college/university)
  - the administration of CPE from a State Society and AICPA perspective
- Includes representation from State Boards as well as NASBA's board
- Is geographically dispersed





## Overview of the Working Draft



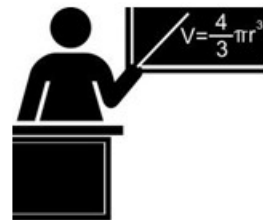


## Overview of the Working Draft



- Nano-Learning

- Blended delivery methods





## Overview of the Working Draft

- Clarification of Definition of Group Live and Group Internet Based Delivery Methods



- Qualified Assessment v. Final Examination **AND** Qualified Assessment During or Conclusion of Course





## Overview of the Working Draft



- Element of Engagement for Group Live Programs

- Retention of status of license of CPA or tax attorney or enrolled agent number if involved in development of technical course





Opportunities during the Break-out Sessions after lunch for further discussion with CPE Standards Working Group members and to provide your feedback!





# **LearningMarket.org - The One-Stop Shop for the National Registry**

**Jill Thompson  
Caleb Raymer  
Courtney Stevens**



# Presentation Slides



## Homepage

**LM LEARNING MARKET** THE TRUSTED CONTINUING EDUCATION RESOURCE

HOME NATIONAL REGISTRY BEST PRACTICES CONTINUING EDUCATION REQUIREMENTS REVIEWER PROGRAM RESOURCES

**2014 REGISTRY SUMMIT**  
**NASBA National Registry Summit**  
 September 17 - 19, 2014 Nashville, TN  
**Looking to the Future**

**2014 National Registry Summit**  
 Registration Closed. Omni Nashville Hotel, Sept 17-19, 2014

**Best Practice Submissions Encouraged**

All CPE program sponsors are strongly encouraged to submit best practices information to NASBA for consideration and inclusion in the new Best Practices section of Learning Market.

During the 2011 revisions process of the **Statement on Standards for Continuing Professional Education (CPE) Programs (2012) (Standards)**, the NASBA CPE Task Force discussed ways to provide CPE sponsors supplemental information to assist in the development of CPE programs. As a result, a Best Practices site has been developed. The Best Practices site is intended to provide supplemental information to assist in the development, presentation, measurement and reporting of CPE programs and to share best practices and ideas among CPE program sponsors. It does not represent "interpretations" of the Standards, and therefore, the contents of the Best Practices site are not enforceable or required.

**Search for CPE Courses**

Subject Area - Please Choose -  
 Month and Year - Please Choose -  
 Credit Hours - Please Choose -  
 Delivery Method - Please Choose -  
 State - Please Choose -  
 Type of Credit - CPE

**Search Courses**

For keyword search click here

**Search for CPE Providers**

Learning Market hosts a database of over 1,300 learning providers. You can search by NASBA ID number, NASBA Registry, company name and keyword.

For keyword search click here

Confirm Registry Sponsor Status

**Provider Login**

View Learning Providers

List Your Programs

Search CPE Requirements

Confirm Registry Sponsor Status

**NASBA Talks**

NASBA Chair Johnson Outlines His Initiatives for 2013-14  
 Wed, 20 Nov 2013 19:07:03 GMT  
 Author: Andy Goldstein, NASBA Electronic Media Specialist and Webmaster  
 Posted: November 20, 2013  
 During his inaugural address at NASBA's 100th Annual Meeting, Carlos Johnson formally accepted his role as NASBA's Chair for 2013-14 and outlined what he hopes to accomplish

**The National Registry of CPE Sponsors**







# Presentation Slides

## NASBA

National Association of State Boards of Accountancy

### Annual Renewals

**LM LEARNING MARKET** THE TRUSTED CONTINUING EDUCATION RESOURCE

HOME | **NATIONAL REGISTRY** | BEST PRACTICES | CONTINUING EDUCATION REQUIREMENTS | REVIEWER PROGRAM | RESOURCES

Announcements

- How to Apply to the Registry
- Initial Application Review Process
- The Standards
- Impact of 2012 Standards - GAS Transition
- State CPE Rosters
- Quality Assurance Service (QAS)
- Annual Renewals

Search

**NASBA**  
About NASBA | NASBA.org

- The Standards (2012)
- The Standards (2002)
- Forms and Applications
- What Sponsors Need to Know
- New CPE Sponsors
- CPE Monitor eNewsletter

**NASBA Talks**

**Annual Renewals**

Renew your membership annually by the first of the month of their approval.

The design days prior to the submission of the renewal form.

Timely renewal of CPE Sponsors is required for continued membership on the National Registry of Accountancy. Failure to renew by the end of your renewal month will result in:

- Removal of your organization's name from the National Registry of CPE Sponsors
- Loss of privileges to use the NASBA logo and National Registry statement
- Being subject to a reinstatement fee if Registry membership is sought within the next two years

**Renewal Payment Policy**

We have gone to great lengths to streamline the renewal process for our sponsors and most of our sponsors have responded positively to the changes and renewed on a timely basis each year. However, we have had our share of late renewals and want to reiterate our Renewal Payment Policy to ensure that all sponsors are aware of the policy and remember to timely file both their renewal form and renewal payment. This is a critical part of membership on the National Registry and failure to do so will lead to removal.

Detailed Description of the Renewal Process and Requirements

**Online Renewal Form**

The online renewal form is a self-certification form with a series of "Yes/No" questions related to the sponsor's continued compliance with the Statement on Standards for Continuing Professional Education (CPE) Programs and NASBA program requirements. No documentation other than completion of the online renewal form and payment of the renewal fee is required at the time of renewal. The review of course material will occur through a desk audit process.

Those Registry sponsors that are in continued compliance will receive a Renewal Approval Notice once responses have been reviewed and receipt of the renewal fee has been verified. If additional information is required to process your renewal form, then you will be contacted by your assigned...

**Renewal Fees**

You may remit payment for the Renewal Fee by credit card or check, by selecting the link to the Online Renewal Form that corresponds to your intended form of payment. Similar to the initial application fee, the renewal fee is based on the number of different program offerings. The renewal fees for the Registry are as follows:

- 1 - 15 different programs - \$725
- 16 - 25 different programs - \$905
- 26 - 50 different programs - \$1,450
- 51 - 100 different programs - \$2,355
- 100 - 250 different programs - \$2,900
- 251 - 500 different programs - \$3,265
- 501 - 1000 different programs - \$3,825





# Presentation Slides

## NASBA

National Association of State Boards of Accountancy

### Registry Forms and Applications

The screenshot shows the National Registry website. The navigation menu includes: HOME, NATIONAL REGISTRY, BEST PRACTICES, CONTINUING EDUCATION REQUIREMENTS, REVIEWER PROGRAM, and RESOURCES. The 'NATIONAL REGISTRY' dropdown menu is open, showing options like 'About the Registry', 'How to Apply to the Registry', 'Initial Application Review Process', 'The Standards', 'Impact of 2012 Standards - GAS Transition', 'Word Count Formula Acceptance', 'Approved Programs', 'Registry Forms and Applications' (circled in red), 'Sponsor Agreement', 'Getting Information and Support', and 'State CPE Rosters'. The main content area features a search bar, a NASBA logo, a list of links (e.g., 'View the Statement on Standards for Continuing Professional Education (CPE) Programs (2012)', 'View the Program Sponsor Agreement'), and a 'Complaint and Appeal Process' section.





# Presentation Slides

## NASBA

National Association of State Boards of Accountancy

Sample Documents

ADM Application

ongoing commitment to providing quality CPE programs. Proper use of the logo and accompanying language is a requirement of membership and is essential for consistent communications. Sponsors should use the National Registry Logo and Statement Guidelines as a reference when producing promotional materials.

### Subject Areas

The CPE Fields of Study curriculum is divided into 23 subject matter areas. These subject areas represent the primary knowledge and skill areas needed by accounting licensees to perform professional services in all fields of employment as accepted by the State Boards of Accountancy.

- View the Statement on Standards for Continuing Professional Education (CPE) Programs (2012)
- View the Statement on Standards for Continuing Professional Education (CPE) Programs (2002)
- View the Program Sponsor Agreement
- View the National Registry Logo and Statement Guidelines
- View the Fields of Study
- View "Overview of Revised Standards" Tutorial

### Complaint and Appeal Process

#### Complaints

NASBA will investigate complaints against CPE program sponsors to determine whether any violation of the Statement on Standards for Continuing Professional Education (CPE) Programs (2012) (Standards) or other National Registry program requirements has occurred. Only complaints submitted using the online Record of Complaint form (see link below) will be accepted. All submitted complaint forms will be investigated, regardless of their source.

#### Appeals

CPE program sponsors who have been denied membership in the National Registry or who have been removed from the National Registry have the right to appeal the adverse decision.

- View the Complaint Process
- View the Appeal Process
- Submit a Record of Complaint Form

### Sample Templates

The following sample templates are provided for guidance in adhering to the Statement on Standards for Continuing Professional Education (CPE) Programs (2012)

- Sample Certificate of Completion
- Sample Promotional Material
- Sample Evaluation Form (Manual Distribution)
- Sample Evaluation Form (Electronic Distribution)
- Sample Pilot Test Form

### Registry Membership Update Forms

For approved Registry members, use the links below to apply for approval for an additional delivery method, to update your company's main point of contact with the National Registry, or to notify the National Registry if your company's name has changed.

- Additional Delivery Method (ADM) Application Interest Form
- Notification of Change in Main Contact or Organization Form

- Provider Login
- Join The Registry
- View Learning Providers
- List Your Programs

### NASBA Talks

NASBA Chair Johnson Outlines His Initiatives for 2013-14  
Wed, 20 Nov 2013 10:07:53 GMT  
Author: Andy Guidstein, NASBA Electronic Media Specialist and Webmaster/Publisher  
November 20, 2013 During his inaugural address at NASBA's 105th Annual Meeting, Carlos Johnson formally accepted his role as NASBA's Chair for 2013-14 and outlined what he hopes to accomplish.





# Presentation Slides

# NASBA

National Association of State Boards of Accountancy

QAS





**LM** QUALITY ASSURANCE SERVICE

RECOGNIZING TOP QUALITY CPE SPONSORS

**Quality Assurance Service (QAS)**

The Quality Assurance Service (QAS) program, established by NASBA in 1998, provides assistance to State Boards and their licensees through its approval of the highest quality CPE providers of self study courses.

Prior to the revisions to the **Statement on Standards for Continuing Professional Education (CPE) Programs (2012) (Standards)**, the National Registry and QAS self study sponsors were held to the same requirements with the exception of the following:

QAS Sponsors were required to:

- Include the participation of at least one CPA in the development of every program in accounting and auditing
- Include the participation of a CPA, tax attorney, or IRS enrolled agent in the development of each program in taxation
- Include no more than 25 percent true/false questions on the final examination
- Not qualify personal development courses as part of its membership

The revised Standards raise the requirements for all self study providers and eliminate the differences between the QAS and Registry self study requirements. NASBA has initiated changes to the administration of these programs to offer one designation for self study programs – "QAS Self Study."

There will be a transition process for current QAS sponsors to the "QAS Self Study" designation to ensure that the revised Standards have been met. Once the transition process has been successfully completed and the sponsor receives approval for the QAS Self-Study delivery method, then all self study courses offered for CPE credit will be considered QAS-approved.

Until the QAS Self Study designation is awarded, current QAS sponsors will remain active, approved QAS providers with respect to their QAS identified courses as long as the QAS sponsor completes the online self-certification renewal form timely and submits required updates to their current QAS program offerings.

- [View the list of approved QAS learning providers and QAS course listings](#)
- [Listing of jurisdictions that accept the self study CPE credits earned through QAS-approved CPE Sponsors](#)
- [View the QAS Logo and Statement Guidelines](#)
- [View the QAS Logo for Newly Issued QAS Self Study Designation](#)

Applying for Transition to QAS Self Study Designation

If you are a current QAS sponsor or a current Registry self study sponsor, there will be a transition process to the QAS Self Study designation to ensure that the revised Standards have been implemented with respect to all of your self study program offerings.

The first step of the process is to review and evaluate your self study offerings to determine if modifications are required in order to make them compliant with the revised Standards. It would be helpful to read and review the revised Standards with particular focus on Standard Nos. 8, 14 and 19.

Once you are comfortable that all self study program offerings are compliant with the revised Standards, you are ready to begin the QAS Self Study Transition Application. In order to receive the application, please complete a QAS Transition Initiation Form. This form will be available until December 1, 2013.



About NASBA | [NASBA.org](#)

- [The Standards \(2012\)](#)
- [The Standards \(2002\)](#)
- [Forms and Applications](#)
- [What Sponsors Need to Know](#)
- [New CPE Sponsors](#)
- [CPE Monitor eNewsletter](#)

Provider Login

View Learning Providers

List Your Programs

**NASBA Talks**

Three Tips for Planning to Take the CPA Exam  
 Wed, 08 Aug 2014 13:13:38 GMT  
 Author: David Sappert, NASBA Communications and Electronic Media Specialist  
 Posted: August 6, 2014  
 The Uniform CPA Examination (Exam) is certainly one of the more challenging competing exams out there.

















# Presentation Slides



## Best Practices

THE TRUSTED CONTINUING EDUCATION RESOURCE

Best Practices

During the 2011 revisions process of the Statement on Standards for Continuing Professional Education (CPE) Programs (2012) (Standards), the NASBA CPE Task Force discussed ways to provide CPE sponsors supplemental information to assist in the development of CPE programs. As a result, a Best Practices site has been developed. The Best Practices site is intended to provide supplemental information to assist in the development, presentation, measurement and reporting of CPE programs and to share best practices and ideas among CPE program sponsors. It does not represent "interpretations" of the Standards, and therefore, the contents of the Best Practices site are not enforceable or required.

The best practices are presented by delivery method (Group Live, Group Internet Based, QAS Self Study and Independent Study) and in four broad categories: development, presentation, measurement and reporting.

The Best Practices site is intended to be a working site, all CPE program sponsors are encouraged to submit best practices information to NASBA for consideration and inclusion.

Information should be submitted to Jessica Luttrill, Manager - National Registry, at [jluttrill@nasba.org](mailto:jluttrill@nasba.org).

About NASBA | [NASBA.org](http://NASBA.org)

- [The Standards \(2012\)](#)
- [The Standards \(2002\)](#)
- [Forms and Applications](#)
- [What Sponsors Need to Know](#)
- [New CPE Sponsors](#)
- [CPE Monitor eNewsletter](#)

NASBA Talks

Group Live

- [Development](#)
- [Presentation](#)
- [Measurement](#)
- [Reporting](#)

QAS Self Study

- [Development](#)
- [Presentation](#)
- [Measurement](#)
- [Reporting](#)

Group Internet Based

- [Development](#)
- [Presentation](#)
- [Measurement](#)
- [Reporting](#)

Independent Study

- [Development](#)



# Presentation Slides

## NASBA

National Association of State Boards of Accountancy

### CPE Monitor

**LM LEARNING MARKET** THE TRUSTED CONTINUING EDUCATION RESOURCE

HOME | NATIONAL REGISTRY | BEST PRACTICES | CONTINUING EDUCATION REQUIREMENTS | REVIEWER PROGRAM | **RESOURCES**

**CPE Monitor eNewsletters**

CPE Monitor is a quarterly eNewsletter designed specifically for Registry Sponsors, state boards of accountancy and other organizations in the learning provider community to communicate news, updates, industry best practices, tips for getting the most out of your membership and more.

Subscribe to the CPE Monitor newsletter

See below for archived articles of the CPE Monitor:

- July 2014
- April 2014
- January 2014
- October 2013
- July 2013
- April 2013
- January 2013
- October 2012
- June 2012
- March 2012
- December 2011
- September 2011
- June 2011
- February 2011

[Back to Top](#)

**Articles**

**Keynote: How MindTackle CEO Krishna Depura**  
The key to the future of learning may be having fun. At least that's what CPE Summit keynote, Krishna Depura has discovered. In 2012, Krishna helped found MindTackle with three other "tech geeks" who shared his vision to turn everyday employees into top performers by building a learning platform that leverages social competition and rewards to make learning more engaging, fun and memorable.

**3rd Annual National Registry Summit Pre-Conference Workshops**  
There will be two interactive pre-conference workshops prior to the 3rd Annual National Registry Summit this year. The first workshop will be Registry 101 and will be taught by NASBA's own Jeanette Cochran, Regulatory Compliance Auditor, and Cynthia Woodlee, National Registry Administrator.

**Standards Working Group, Model Rule Task Force Work on Future of CPE**  
The *Statement on Standards for Continuing Professional Education (CPE) Programs (Standards)* is published jointly by the American Institute of Certified Public Accountants (AICPA) and the National Association of State Boards of Accountancy (NASBA) to provide a framework for the development, presentation, measurement, and reporting of CPE programs.

**Transition to New GAS Self Study Designation - Update**

**NASBA Talks**  
Three Tips for Planning to Take the CPA Exam  
Wed, 05 Aug 2014 13:13:38 GMT  
Author: David Sargent, NASBA Communications and Electronic Media Specialist/Posted: August 6, 2014  
The Uniform CPA Examination (Exam) is certainly one of the more challenging competency exams out there.





# Presentation Slides



## Provider Zone

**LM LEARNING MARKET** THE TRUSTED CONTINUING EDUCATION RESOURCE

HOME NATIONAL REGISTRY BEST PRACTICES CONTINUING EDUCATION REQUIREMENTS REVIEWER PROGRAM **RESOURCES**

**What Sponsors Need to Know**

- Provider Zone: What is the Provider Zone and how do I log in?
- Provider Zone: How do I list new courses on Learning Market or make changes to existing courses?
- Provider Zone: How do I edit our company details and update the main contact listed on our Learning Market profile?
- I am on the LearningMarket.org website and can't seem to find the renewal application form. How do I receive the renewal form and when?
- What are the most common mistakes made on promotional materials?
- What's the process from the time I file my online application until I hear from NASBA that I've been approved?
- Where can I get an invoice?
- When do I receive my renewal form?
- What do I submit with the renewal form?
- Where can I find the Additional Delivery Method (ADM) Application?
- How do I ensure that I get my Registry-related emails?
- What are the guidelines for using the Registry logo and Registry statement on a Sponsor's website and online materials?
- What is the difference between Group Live, Group Internet Based and Self Study when it comes to the actual instructional methods?
- Why are there 23 fields of study? I am a CPE provider and state societies require certain fields of study on their certificates of completion that aren't included in the list of 23?
- What do I do now that I have been selected for a random desk audit?
- What are my compliance responsibilities if I (Registry sponsor) have contractual arrangements with clients?
- What are my compliance responsibilities if I (Registry sponsor) purchase content from an outside vendor?
- What are my compliance responsibilities if I (Registry sponsor) sell services to CPE providers?
- The application/form that I am completing has asked for a program listing. What time period should my program list include?
- My application to the National Registry was denied and I don't agree with the findings. What can I do?

Back to Top

**Provider Zone: What is the Provider Zone and how do I log in?**

The Provider Zone allows you to manage your learning provider online listing on the Learning Market website. You can maximize your exposure by ensuring that you enter as much information as possible about your company. While logged in to the Provider Zone, you can:

- Manage the courses listed on LearningMarket.org by adding new courses or updating existing ones
- Keep your profile current by updating company address, social media links and main contact information
- Update and enhance your online listing by adding more detail about your company including uploading logos, videos, etc.

Login Instructions:

- Go to [www.LearningMarket.org](http://www.LearningMarket.org)
- Click on the "Provider Login" button (located on the right side of the home page):





# LEARNING MARKET

Did You Know?

Learning Market, The Trusted Continuing Education Resource, is also your source for all things related to the NASBA National Registry of CPE Sponsors!

Go to [www.learningmarket.org](http://www.learningmarket.org) to:

- List your courses for all licensees to browse
- Promote your courses
- Access the *Statement on Standards for Continuing Professional Education (CPE) Programs (2012)*
- Request information and applications for the NASBA Registry


Questions about LearningMarket.org? Contact Caleb Raymer, Learning Market Webmaster Email: [craymer@nasba.org](mailto:craymer@nasba.org) or Phone: 615-312-3847

NASBA





## Log in to Your Provider Zone on LearningMarket.org:


1. Go to [www.learningmarket.org](http://www.learningmarket.org)
2. Click on  (located on the right side of the screen)
3. Enter Login ID and Password and click "Submit" (If you do not remember your login, click "Forgotten your login details?" and submit your email address)
4. You are now logged in to the Provider Zone where you can:
  - Manage the courses listed on LearningMarket.org by adding new courses or updating existing ones
  - Update and enhance your online listing by adding more detail about your company including uploading logos, videos, etc.
  - Keep your profile current by updating company address, social media links and main contact information

### Tips for Navigating the Provider Zone:

- Click on "Dashboard" at the top of the screen to return to the main page of the Provider Zone at any time
- Click on "View Online Listing" to open your company profile in a new window
- Always scroll down for more options
- Use the "back" button on your browser to return to the previous screen
- Always remember to logout!



## List Your Courses on LearningMarket.org:

1. Log in to your Provider Zone on [www.learningmarket.org](http://www.learningmarket.org)
2. Click on  (located in the "Manage Your Courses" section)
3. To add a new course, click on "Add a new course" at the top of the section
4. To edit an existing course, click on either the course title or the corresponding "Preview" link
5. Enter all the course details following the instructions on the screen
6. When complete, "Preview" the course then click "Publish" to make the course active on the Learning Market website

### Notes:

- Courses listed as "Complete" are active and searchable on the website
- Courses listed as "Inactive" are expired and are not currently listed on the website --- you can edit an expired course and update the "Course End Date" to make the course active again
- If you have a large number of courses to add (50-100+), you can submit the data to be automatically uploaded --- more information can be found in the "Member Services" section of the Provider Zone where you may obtain the course upload template



## Manage Your Contact Details on LearningMarket.org:

1. Log in to your Provider Zone on [www.learningmarket.org](http://www.learningmarket.org)
2. In the section "Update Your Company Details," click on "Edit main contact details" to make changes to the contact listed on your Learning Market profile, or to grant access to an additional contact  
*(if you are logged in as the main contact, you can also change the Login ID and Password for a contact, and "send login details" to their specified email address)*
3. Click on "Edit company contact details" to make changes to company mailing address, phone number or website, as well as to add any social media links (changes to the Company Name cannot be made here --- contact your Account Manager for assistance)
4. Click on "Edit company profile" to add background information about your company and other pertinent information

### Tools to "Enhance Your Listing" can be found below the "company details" section.

Here you can:

- Upload a Company Logo
- Upload a Video
- Upload .PDF Brochures
- Upload Press Releases



## How do I get to Learning Market?

1. You may go directly to the website, [www.learningmarket.org](http://www.learningmarket.org) OR
2. You may access Learning Market from [www.nasba.org](http://www.nasba.org)
3. To access the site from [www.nasba.org](http://www.nasba.org), click the Member Center tab in the top right
4. Select "Member Products and Services"
5. Scroll down to Education Resources
6. Click "Learn more at LearningMarket.org"



## Where is the information on adding additional delivery methods?

1. Go to [www.learningmarket.org](http://www.learningmarket.org)
2. From the National Registry tab, click "Annual Renewals"
3. Scroll to the bottom of the screen
4. Click "Find out more about approval for an Additional Delivery Method (ADM)"
5. This will take you to a screen with instructions for applying for additional delivery methods



## How can I get the renewal application and what are the fees?

1. The designated main contact for your organization will receive an email with instructions and the link to the online renewal form 30 days prior to the renewal date.
2. The application is NOT available on the website.
3. You must renew your membership annually by the first of the month of the initial approval date.
4. To locate renewal fees, go to the website, [www.learningmarket.org](http://www.learningmarket.org)
5. From the National Registry tab, click "Annual Renewals"
6. The fee schedule appears toward the bottom of the page on the right





**Learning Objectives: Refresher**  
**Johnny Owsley**  
**Miki Klein**



# Learning Objectives: Refresher

Instructional Design Administrators:

Ashlee Baker

Johnny Owsley

Gina Thayer

Miki Klein





# SMART Learning Objectives

- Learning Objectives are a key component of course creation and must be SMART.

**S**pecific  
**M**easurable  
**A**ttainable  
**R**elevant  
**T**argeted





## SMART Learning Objectives

### **Standard No. 2**

Sponsored learning activities must be based on relevant learning objectives and outcomes that clearly articulate the knowledge, skills, and abilities that can be achieved by participants in the learning activities.

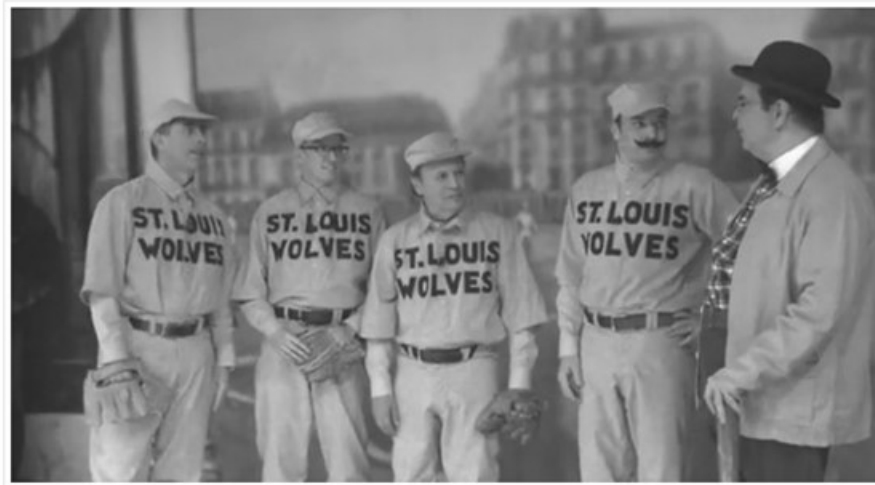




## SMART Learning Objectives

### Specific

Learning objectives must focus on the knowledge, skills, and abilities the learner should accomplish at the end of the course.





## SMART Learning Objectives

### Measurable

Learning objectives must be able to be measured by the means assessed.







## SMART Learning Objectives

### Attainable

The learning objectives must be able to be mastered by the learner in the time provided.





## SMART Learning Objectives

### Relevant

Learning objectives must matter and be important to the work of the learner.





## SMART Learning Objectives

### Targeted

Learning objectives must be targeted to the learner considering factors such as education, previous knowledge and experience.





# Presentation Slides

**NASBA**  
National Association of State Boards of Accountancy





## Presentation Slides



## National Registry QAS-SS Team

Ashlee Baker  
615-312-3795  
abaker@nasba.org

Miki Klein  
615-564-2124  
mklein@nasba.org

Johnny Owsley  
615-312-3808  
jowsley@nasba.org

Gina Thayer  
615-312-3791  
gthayer@nasba.org





# **Sharing Innovative Delivery Method Ideas**

**Eric Dingler, Deloitte**

**Rita Sehgal and Pamela Weeks, Ernst & Young**

**Mary Kate Head, CliftonLarsonAllen**



# Sharing Innovative Delivery Method Ideas

Moderator: *Maria Caldwell, Director of Compliance Services*

Panelists:

*Eric Dingler, Deloitte*

*Rita Sehgal and Pamela Weeks, Ernst & Young*

*Mary Kate Head, CliftonLarsonAllen*





## Presentation Slides

**NASBA**  
National Association of State Boards of Accountancy

Compliance

Best Learning  
Methods

Compliance





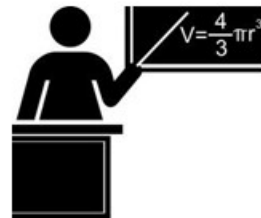


## Sharing of Innovative Delivery Methods



- Nano-Learning

- Blended delivery methods





## Sharing of Innovative Delivery Methods

- Simulation

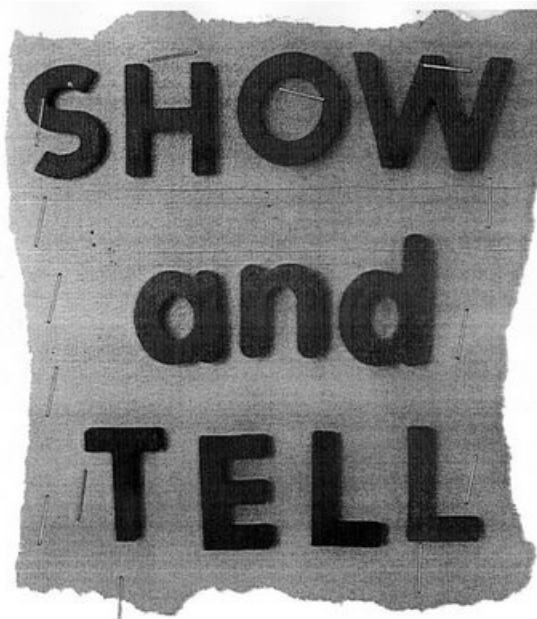




## Presentation Slides



## Sharing of Innovative Delivery Methods





# Presentation Slides

# NASBA

National Association of State Boards of Accountancy

