
INSTRUCTOR LED (FACE-TO-FACE) COURSES

(a) - Background: The California Business & Professions Code Section 22255 requires that individuals successfully complete both a 60-hour Qualifying Education (QE) course to become a CTEC Registered Tax Preparer (CRTP), and 20 hours annually of Continuing Education (CE) to renew their registration. QE and CE courses must be taken from a CTEC-approved curriculum provider and can be either instructor-led courses or self-study courses. CE courses must be taken from a CTEC-approved curriculum provider who is in good standing with the IRS as an approved provider

(b) - Face to face (Instructor-led) courses, such as live conferences and seminars, qualify for continuing education if the course:

- (1)** Requires attendance and provides each attendee with a certificate of attendance;
- (2)** Is conducted by a qualified instructor, discussion leader, or speaker (see subsection (d) below);
- (3)** Provides or requires a written outline, textbook, or suitable electronic materials; and,
- (4)** Utilizes a means of monitoring participants' attendance.

(c) - CE Credit - CE credit for a face-to-face course is based upon each student's physical presence during the course's presentation. No testing is required. A contact hour for a face-to-face course is 50 minutes.

(d) – QE Credit – QE credit for a face-to-face class requires the successful completion of a final exam. See CP13A for details.

(e)- Instructors, discussion leaders, and speakers: Instructors, discussion leaders, and speakers must be qualified with respect to both course content and instructional methods used.

Commentary: Instructors are key components of the learning process for any face-to-face program. Therefore, it is imperative that providers exercise great care in selecting qualified instructors for all programs. Qualified instructors must be competent and current with regards to the subject matter, skilled in the use of the appropriate instructional methods and technology, and prepared. They also must be capable, through training, education, and/or experience, to communicate effectively and provide an environment conducive to learning.

(f)- Provider Approval - Providers approved to offer interactive self-study courses automatically receive approval to offer face-to-face courses. However, providers approved to offer face-to-face courses must obtain additional approval to offer interactive self-study courses (CP02).

(g) - Courses submitted for review to CTEC must be in English.

Approved May 18, 2012

Responsibility: Curriculum Provider Standards Committee