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# CONTINUING EDUCATION GUIDELINES

## Revised September 2012

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### Self Study

#### 1. Internet Courses

Material that is current, relevant, accurate and that includes valid reference materials, graphics and interactivity.

Clearly defined objectives and course completion criteria.

Specific instructions to register, navigate and complete the course work.

Technical support/provider representative be available a minimum of 14 hours.

Include information as to the minimum system requirements.

Process to authenticate student identity by signature or electronic identity verification. The signed Affidavit of Course Attendance serves as the Provider's sworn statement that the students on the Course Attendance report are the individuals who hold the license and took the course.

Include a statement that the student information will not be sold or distributed to any third party without prior written consent of the student. Taking the course shall not constitute consent.

Provide some type of encryption. All personal information, including credit card number, name and address of the student must be encrypted so that the information cannot be read as it passes across the internet.

Inform the student as to the period of time that a course is accessible from the date of purchase. Must include a disclaimer that the course is approved only to December 31, XXXX (*This date should be updated upon renewal of the Provider and/or Course.*)

The following method must be used during the course to ensure student participation:

- The course must provide review questions at the end of each chapter/unit and prevent access to the final exam until each set of questions are answered at a 70% rate.

Include a high level of interactivity (clicking on paths and navigation through an instructional sequence is not representative or interactivity).

Inability to print, launch or complete an online exam prior to reviewing the course material.

A final exam is required at the end of the course to measure the student's successful completion of course material and for evaluating the learning experience. A student is NOT allowed to go back to view the course content.

Process for requesting and receiving CE course-completion certificate.

If during an audit by the Oklahoma Insurance Department, your course materials have deviated from approved course outlines, or are in violation of Oklahoma CE Statutes, Rules or Guidelines you will be asked to discontinue your course offerings until the material has been updated to comply with the Statutes, Rules and Guidelines.

## 2. Correspondence

Material that is current, relevant, accurate and that includes valid reference materials, graphics and interactivity.

Clearly defined objectives and course completion criteria.

Specific instructions to register and complete the course work.

Process to authenticate student identity by signature or electronic identity verification. The signed Affidavit of Course Attendance serves as the Provider's sworn statement that the students on the Course Attendance report are the individuals who hold the license and took the course.

Include a statement that the student information will not be sold or distributed to any third party without prior written consent of the student. Taking the course shall not constitute consent.

Inform the student as to the period of time that a course is accessible from the date of purchase. Must include a disclaimer that the course is approved only to December 31, XXXX (*This date should be updated upon renewal of the Provider and/or Course.*)

A final exam is required at the end of the course to measuring the student's successful completion of course material and for evaluating the learning experience.

Process for requesting and receiving CE course-completion certificate.

If during an audit by the Oklahoma Insurance Department, your course materials have deviated from approved course outlines, or are in violation of Oklahoma CE Statutes, Rules or Guidelines you will be asked to discontinue your course offerings until the material has been updated to comply with the Statutes, Rules and Guidelines.

## CE Course Hours Calculation Methods

- **Calculation of CE hours of Credit using NAIC screen count methodology**

600-700 words (standard font size) = one text page

45 screens – one hr of credit

Divide total screens by 45 – total number of credit hours

Multiply number of hours by

1.00 for basic level course

1.25 for an intermediate level

1.50 for an advanced course

(Fractional hours rounded up to .50 or above and rounded down if .49 or less)

Up to 1 additional hour allowed for test taking. Test questions may not be included in the word count.

- **Calculation of CE hours of Credit utilizing NAIC word count methodology**

Divide total number of words by 180 (documented average reading time)

= number of minutes to read material

Divide number of minutes by 50 = credit hours

Multiply number of hours by

1.00 for basic level course

1.25 for an intermediate level

1.50 for an advanced course

(Fractional hours rounded up to .50 or above and rounded down if .49 or less)

Up to 1 additional hour allowed for test taking. Test questions may not be included in the word count.

## **Final Assessment (exam) Criteria for both Internet and Correspondence**

Minimum of 25 questions for courses of 4 hours or less; score of 70% or greater

Minimum of 50 questions for courses of 5 hours or more; score of 70% or greater.

At least enough questions to fashion a minimum of 2 versions with at least 50% of questions being new/different in each subsequent version.

Electronic verification of identity at the time an online exam is taken is allowable for the student.

Final Exam Questions should not be the same as review or interactive questions.

## **Classroom:**

Material that is current, relevant, accurate and that includes valid reference materials, graphics and interactivity.

Clearly defined objectives and course completion criteria

Specific instructions to register and complete the course.

Process to authenticate student identity by signature or electronic identity verification. The signed Affidavit of Course Attendance serves as the Provider's sworn statement that the students on the Course Attendance report are the individuals who hold the license and took the course.

Include a statement that the student information will not be sold or distributed to any third party without prior written consent of the student. Taking the course shall not constitute consent.

Inform the student as to the period of time that a course is accessible from the date of purchase. Must include a disclaimer that the course is approved only to December 31, XXXX (*This date should be updated upon renewal of the Provider and/or Course.*)

Attendance for the entire class is necessary to obtain credit. There is no partial credit.

Process for requesting and receiving CE course-completion certificate.

Attendees should not engage in other activities during the class; e.g., there should be no reading of newspapers, doing other work, opening email, texting, sleeping, private conversations, etc. A provider should not give a course completion certificate to any student that did not pay satisfactory attention or otherwise failed to demonstrate acceptable student conduct in class.

If the Oklahoma Insurance Department performs an audit and finds that providers are giving course completion certificates to students that are not paying satisfactory attention; the provider status may be revoked.

If during an audit by the Oklahoma Insurance Department, your course materials or instruction technique have deviated from approved course outlines, or are in violation of Oklahoma CE Statutes, Rules or Guidelines you will be asked to discontinue your course offerings until the material and/or instruction technique have been updated to comply with the Statutes, Rules and Guidelines.

## **Distance Learning:**

### **1. Video conferences, Videos or Recordings of Live Presentations, including Downloads from the Internet**

Material that is current, relevant, accurate and that includes valid reference materials, graphics and interactivity.

Clearly defined objectives and course completion criteria

Specific instructions to register, navigate and complete the course work

Technical support/provider representative be available a minimum of 14 hours.

Include information as to the minimum system requirements.

Process to authenticate student identity by signature or electronic identity verification. The signed Affidavit of Course Attendance serves as the Provider's sworn statement that the students on the Course Attendance report are the individuals who hold the license and took the course.

Include a statement that the student information will not be sold or distributed to any third party without prior written consent of the student. Taking the course shall not constitute consent.

Inform the student as to the period of time that a course is accessible from the date of purchase. Must include a disclaimer that the course is approved only to December 31, XXXX (*This date should be updated upon renewal of the Provider and/or Course.*)

Include a high level of interactivity.

Method of tracking participation

The course must include codes imbedded in the presentation. The Provider must receive and verify accurate documentation of the codes from the student before reporting satisfactory completion of the course to the Department. There must be two codes for every hour of CE credit.

-or-

The video or recording must be monitored by a disinterested third party (proctor). A disinterested third party is defined as someone with no business or family relationship to the student. Self Study Courses have strict policies regarding proctor selection. An acceptable proctor is someone with no conflict of interest. Relatives, spouses, and co-workers are not acceptable proctors. Acceptable proctors would include Human Resources Director or Manager, librarians, CPA's, Attorney's or other licensed individuals.

Methods for tracking attendance must be made available to the Department upon request.

Process for requesting and receiving CE course-completion certificate.

If during an audit by the Oklahoma Insurance Department, your course materials have deviated from approved course outlines, or are in violation of Oklahoma CE Statutes, Rules or Guidelines you will be asked to discontinue your course offerings until the material has been updated to comply with the Statutes, Rules and Guidelines.

## 2. Teleconferences and Webinars

Material that is current, relevant, accurate and that includes valid reference materials, graphics and interactivity.

Clearly defined objectives and course completion criteria.

Specific instructions to register, navigate and complete the course work.

Technical support/provider representative be available a minimum of 14 hours.

Include information as to the minimum system requirements.

Process to authenticate student identity.

Include a statement that the student information will not be sold or distributed to any third party without prior written consent of the student. Taking the course shall not constitute consent.

Inform the student as to the period of time that a course is accessible from the date of purchase. Must include a disclaimer that the course is approved only to December 31, XXXX (*This date should be updated upon renewal of the Provider and/or Course.*)

Method of tracking participation

The Provider must also require response from the student during the presentation to confirm active attendance, such as typing or speaking a word or phrase or entering a code from a keypad. There must be two responses for every hour of CE credit.

-or-

The teleconference or webinar must be monitored by a disinterested third party (proctor). A disinterested third party is defined as someone with no business or family relationship to the student. Self Study Courses have strict policies regarding proctor selection. An acceptable proctor is someone with no conflict of interest. Relatives, spouses, and co-workers are not acceptable proctors. Acceptable proctors would include Human Resources Director or Manager, librarians, CPA's, Attorney's or other licensed individuals.

Methods for tracking attendance must be made available to the Department upon request.

Process for requesting and receiving CE course-completion certificate.

If during an audit by the Oklahoma Insurance Department, your course materials have deviated from approved course outlines, or are in violation of Oklahoma CE Statutes, Rules or Guidelines you will be asked to discontinue your course offerings until the material has been updated to comply with the Statutes, Rules and Guidelines.