The course overview and introduction set the tone for the course, let learners know what to expect, and provide guidance to ensure learners get off to a good start.

<table>
<thead>
<tr>
<th>Standard</th>
<th>Points</th>
<th>Annotation</th>
</tr>
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<tbody>
<tr>
<td>1.1 Instructions make clear how to get started and where to find various course components.</td>
<td>3</td>
<td>Instructions provide a general course overview, present the schedule of activities, guide the learner to explore the course site, and indicate what to do first, in addition to listing detailed navigational instructions for the whole course. Instructors may choose to incorporate some of this information in the course syllabus. In this case, learners should be directed to the syllabus at the beginning of the course. A useful feature is a “Read Me First” or “Start Here” button or icon on the course home page, linking learners to start-up information. Examples: 1. A course “tour” 2. Clear statements about how to get started in the course 3. A “scavenger hunt” or “syllabus quiz” assignment that leads learners through an exploration of the different parts of the course 4. A table or diagram that depicts the relationship between the online and face-to-face portions of a blended course.</td>
</tr>
<tr>
<td>1.2 Learners are introduced to the purpose and structure of the course.</td>
<td>3</td>
<td>Information is provided to help learners understand the purpose of the course and how the learning process is structured and carried out, including course schedule, delivery modalities (online or blended), modes of communication, types of learning activities, and how learning will be assessed. Such information may be provided or reinforced in the course syllabus or other course documents; or in areas with titles such as “Course Introduction,” “Welcome from the Instructor,” “Start Here,” “Course Schedule,” “Course Outline,” “Course Map,” “Course Calendar,” etc.</td>
</tr>
</tbody>
</table>
### Blended Courses

The purpose of both the online and face-to-face portions of the course is clearly explained to learners to help them understand how and why both formats are important to the learning process. The course schedule or calendar fully covers both the online and face-to-face portions of the course and clearly specifies the dates, times, and locations of face-to-face class meetings.

### Competency-Based Courses

In addition to the purpose of the competency-based course, the options available to competency-based learners to complete the course are clearly delineated through detailed instructions. Reviewers may look for this information in the course site or linked from the course site to the program website.

| 1.3 Etiquette expectations (sometimes called “netiquette”) for online discussions, email, and other forms of communication are clearly stated. | 2 | Expectations for how learners are to communicate online and in the classroom are clearly stated. Since learner behavior is culturally influenced, it is important to be explicit about standards for communication that apply in the course. The substance of etiquette expectations is not to be evaluated.  

Examples of etiquette considerations:  
1. Expectations for the tone and civility used in communicating with fellow learners and the instructor, whether the communication is by electronic means or by telephone or face-to-face  
2. Expectations for email content, including “speaking style” requirements (e.g., standard English as opposed to popular abbreviations used online and regional colloquialisms)  
3. Spelling and grammar expectations  
4. Awareness of and sensitivity to cultural differences  

To reinforce etiquette and civility, the instructor may provide a link or reference to the institution’s student handbook or code of conduct. |

| 1.4 Course and/or institutional policies with which the learner is expected to comply are clearly stated, or a link to current policies is provided. | 2 | Policies may be established by the instructor or by the institution.  
Policies may address such matters as student conduct, academic integrity, late submission of assignments, the grade of “Incomplete,” withdrawal without penalty, confidentiality in the classroom, student grievances, electronic communication, etc. Confirm that the policies are adequately explained and up-to-date. The substance of policies is not to be evaluated.  

Academic integrity and late submission policies are especially important. Reviewers might suggest inclusion of these policies if they are not found in the course.  

Reviewers may look for links to the student handbook or other institution-wide policy publications. |
| 1.5. Minimum technology requirements are clearly stated and instructions for use provided. | 2 | Learners are provided with detailed, clearly worded information regarding the technologies they will need throughout the course. The word “technologies” covers a wide range, including hardware, software, subscriptions, and plug-ins. In evaluating whether this Standard is met, confirm that clear instructions are provided for obtaining, installing, and using the technologies.

Examples of information to include in a technology requirements statement:
1. If speakers, a microphone, and/or a headset are necessary, the need for such peripherals is clearly stated.
2. A list of required downloadable resources, including links, is provided.
3. If publisher materials are required, clearly stated instructions for how to obtain and use any required access codes are provided. |

| 1.6 Prerequisite knowledge in the discipline and/or any required competencies are clearly stated. | 1 | Information about prerequisite knowledge and/or competencies is found within the course, in documents linked to the course, or in supporting material provided to the learner by another means. Look for a link to that information and/or a reminder of it for the learner.

Discipline knowledge prerequisites specify other courses that would enable the learner to meet the requirements. |

| 1.7 Minimum technical skills expected of the learner are clearly stated. | 1 | General as well as course-specific technical skills learners must have to succeed in the course are specified.

Examples of technical skills might include
1. Using the learning management system
2. Using email with attachments
3. Creating and submitting files in commonly used word processing program formats
4. Copying and pasting
5. Downloading and installing software
6. Using spreadsheet programs
7. Using presentation and graphics programs |

| 1.8 The self-introduction by the instructor is appropriate and is available online. | 1 | The initial introduction creates a sense of connection between the instructor and the learners. It presents the instructor as professional as well as approachable, and includes the essentials, such as the instructor’s name, title, field of expertise, email address, phone number, and times when the instructor is typically online or may be reached by phone.

Expectations of the relationship and communication style between teacher and learner are culturally influenced. Including information about the role of the instructor and how to address the instructor is helpful to learners from all backgrounds.

The self-introduction helps learners get to know the instructor and, in addition to the essentials mentioned above, could include |
| Comments on teaching philosophy | A summary of past experience with teaching online courses  
Personal information such as hobbies, family, travel experiences, etc.  
A photograph, audio message, or video (including alternative formats to ensure accessibility)  

**Blended Courses:** The instructor’s self-introduction is available electronically for learners who missed early face-to-face meetings.  

**Competency-Based Courses:** The learner’s primary faculty or staff contact authors the self-introduction. The roles of instructor, facilitator, coach, mentor, assessor, or other staff who support the competency-based learner are clearly described. More than one self-introduction may be needed if learners are expected to contact different individuals for guidance on different aspects of the course.  

| 1.9 Learners are asked to introduce themselves to the class. | 1 | Learner introductions at the beginning of the class help to create a welcoming learning environment and a sense of community. Learners are asked to introduce themselves and given guidance on where and how they should do so.  

In a few situations, such as when a class is very large, learner introductions may not be feasible. Instructors are asked to indicate in the Course Worksheet if there is a reason for not providing an opportunity for learner introductions.  

Instructors may ask learners to respond to specific questions (such as why they are taking the course, what are their strategies for success, what concerns they have, what they expect to learn, etc.) or may choose to let the learner decide what to include. Instructors may provide an example of an introduction and/or start the process by introducing themselves. Instructors may give learners the opportunity to represent themselves by text, audio, or visual means.  

**Blended Courses:** The opportunity for introductions is available electronically for learners who may have missed the opportunity during early face-to-face meetings. Ideally, learner introductions are posted online, for future reference, even if learners have introduced themselves in a face-to-face meeting.  

**General Standard 2 – Learning Objectives (Competencies):** Learning objectives or competencies describe what learners will be able to do upon completion of the course.  

The learning objectives or competencies establish a foundation upon which the rest of the course is based.
### Alignment

The concept of alignment is intended to convey the idea that critical course components work together to ensure that learners achieve the desired learning outcomes. Measurable course and module/unit learning objectives or competencies form the basis of alignment in a course. Other elements of the course, including those addressed in Standards 2.2, 3.1, 4.1, 5.1, and 6.1, contribute to the accomplishment of the learning objectives or competencies.

Measurable course learning objectives or competencies precisely and clearly describe what learners will learn and be able to do if they successfully complete the course. Course objectives or competencies describe desired learner mastery using terms that are specific and observable enough to be measured by the instructor. At some institutions, learning objectives or competencies may be called “learning outcomes.”

Examples of measurable objectives or competencies:

1. Select appropriate tax strategies for different financial and personal situations.
2. Develop a comprehensive, individualized wellness action program focused on overcoming a sedentary life-style.
3. Demonstrate correct use of personal protective equipment.
4. Articulate personal attitudes and values related to the use of medical marijuana.
5. Collaborate on a group project by completing designated tasks and offering feedback to team members on their tasks.

In a course in which learners are expected to demonstrate “core competencies,” such as analytical skills and/or ability to express themselves effectively in writing or in other forms of communication, the course should include reference to these foundational, core objectives or competencies in addition to objectives or competencies that relate to course-specific mastery of content. For instance, if the institution has a writing-across-the-curriculum requirement, the instructor of a course in economics may be expected to evaluate the effectiveness of learners’ writing as well as their mastery of principles of economics. Accordingly, objectives or competencies related to writing effectiveness will be included in the course.

In addition to measurable objectives or competencies, a course may have objectives or competencies or desired outcomes that are not easily measured, such as increased awareness of, sensitivity to, or interest in certain issues or subjects, or ability to work as a team member on a group project. Such objectives or competencies cannot be substituted for measurable objectives or competencies when determining whether Standard 2.1 is met. In order for the Standard to be met, a majority (85%) of the course-level objectives or competencies must be measurable.
Special Situations: In some cases (check the Course Worksheet), the course objectives or competencies are institutionally mandated, and the individual instructor does not have the authority to change them. If the institutionally mandated learning objectives or competencies are not measurable, make note of it in your recommendations. Write specific suggestions for improvement that can be used at the institution level to frame objectives or competencies in terms that are measurable. If the course objectives or competencies are institutionally mandated, then the reviewer may need to consider Standard 2.1 in conjunction with Standard 2.2, as follows:

Standard 2.1 is MET under the following circumstances:
1. The course objectives or competencies are measurable, whether set by the institution or by the instructor.
2. The institutionally mandated course objectives or competencies are not measurable, but the faculty-written module/unit objectives or competencies are measurable and aligned with the course objectives or competencies.

Standard 2.1 is NOT MET under the following circumstances:
1. There are no stated course objectives or competencies.
2. The course objectives or competencies set by the instructor are not measurable.
3. The institutionally mandated course objectives or competencies are not measurable, and the faculty-written module/unit objectives or competencies are either not measurable or not present.

NOTE: *It is not possible to complete the course review if measurable learning objectives or competencies are not present. In such a case, the review is suspended and the team chair consults the instructor to clarify whether or not the matter can be quickly addressed so the review can continue.*

2.2 The module/unit learning objectives or competencies describe outcomes that are measurable and consistent with the course-level objectives or competencies.

3 **Alignment:** The concept of alignment is intended to convey the idea that critical course components work together to ensure that learners achieve the desired learning outcomes. Measurable module/unit learning objectives or competencies form the basis of alignment in a course because they are consistent with the course-level objectives or competencies (2.1). Objectives or competencies explain how learners will be assessed (3.1). Instructional materials (4.1), activities (5.1), and technologies used in the course (6.1) contribute to the accomplishment of the learning objectives or competencies.

Learning objectives or competencies at the module/unit level align with and are more specific than course objectives or competencies. The module/unit learning objectives or competencies describe learner mastery
in specific, observable terms and in smaller, discrete pieces. The objectives or competencies precisely describe the specific competencies, skills, and knowledge learners are able to master and demonstrate at regular intervals throughout the course. The module/unit objectives or competencies may either implicitly or explicitly be aligned with the course-level objectives or competencies.

Here is an example of a set of module/unit objectives or competencies that aligns with a course objective or competency:

<table>
<thead>
<tr>
<th>Course Objective or Competency</th>
<th>Module Objectives or Competencies</th>
</tr>
</thead>
</table>
| Upon completion of this course, learners will demonstrate mastery of rules of punctuation | 1. Learners will write sentences that demonstrate correct use of commas, semicolons, and periods.  
2. Learners will use apostrophes when, and only when, needed.  
3. Learners will use double and single quotation marks correctly in quoted material. |

Module or unit objectives or competencies may be written by the instructor or may come from the textbook. Regardless of origin, these objectives or competencies must be prominently stated in the corresponding module or unit so they are available to the learner from within the online classroom. At some institutions learning objectives or competencies may be referred to as “learning outcomes.”

NOTE: It is not possible to complete the course review if measurable learning objectives or competencies are not present. In such a case, the review is suspended and the team chair consults the instructor to clarify whether or not the matter can be quickly addressed so the review can continue.
| 2.3 All learning objectives or competencies are stated clearly and written from the learner’s perspective. | 3 | The course and module/unit learning objectives or competencies are stated clearly and prominently in the online classroom for all course delivery formats. For example, the course-level objectives or competencies are articulated in the course introduction or syllabus, and the module/unit-level objectives or competencies appear in each module/unit.  

The learning objectives or competencies are written in a way that allows learners, including non-native speakers, to easily grasp their meaning and the learning outcomes expected. The use of educational or discipline jargon, unexplained terminology, and unnecessarily complex language is avoided.  

**Blended Courses:** In addition to being provided in the face-to-face classroom, the learning objectives or competencies are shared by the instructor in the online classroom. |

| 2.4 The relationship between learning objectives or competencies and course activities is clearly stated. | 3 | Learning objectives or competencies are integrated throughout the course and are not just listed in the syllabus. Confirm a relationship exists between the stated learning objectives or competencies and the activities learners are asked to complete.  

Examples of course components that clarify the relationship:  
1. Links from assignments to the relevant course objectives or competencies  
2. A numbering system that shows how course activities correspond to learning objectives or competencies  
3. A narrative explaining how the course activities enable learners to meet the objectives or competencies  

As a reviewer, consider both the course and module/unit learning objectives or competencies in your assessment of this Standard. Reviewers may look for information indicating which learning activities, instructional materials, assignments, and assessments support specific learning objectives or competencies.  

See Standard 4.2 regarding instructions to learners on how to use the instructional materials to meet the learning objectives or competencies. The relationship between course objectives or competencies and learning activities also is discussed in Standard 5.1. |
2.5 The learning objectives or competencies are suited to the level of the course.

Expected content mastery is appropriate to the type and level of the course. Taxonomies that describe levels of learning can be helpful in categorizing learning objectives or competencies by level and in enabling reviewers to determine whether the objectives or competencies correspond to the course.

For example, a first-year course is likely to include objectives or competencies that are lower in the cognitive realm than those in an upper-level course. Objectives or competencies in a lower-level course may use verbs such as “identify,” “describe,” or “apply,” which align with assessments such as multiple-choice quizzes, essay questions in exams, or solving problems.

In addition to content-specific objectives or competencies, lower-division courses may address content mastery and core learning skills. Core learning skills, including critical thinking, information literacy, and technology skills, are typically those that transcend an individual course and are integrated across the curriculum. Core learning skills are sometimes called “core competencies.”

Upper-division and graduate courses may focus on objectives or competencies closely related to the specific discipline. For example, an upper-level or graduate course would include objectives or competencies high in the cognitive realm and use verbs such as “differentiate,” “design,” or “justify,” with assessments such as critiques, flow charts, or original research.

Examine the course and module/unit learning objectives or competencies as a whole to ensure they describe knowledge and skills that correspond to the course level.

Evaluating content mastery expectations may be difficult for reviewers whose expertise is not in the course discipline. Reviewers should apply professional judgment, experience, and their understanding of taxonomies of learning to determine if the stated learning objectives or competencies align with the course level. Reviewers with questions about the alignment of learning objectives or competencies with the level of the course should consult with the subject matter expert on the review team.

General Standard 3 – Assessment and Measurement: Assessments are integral to the learning process and are designed to evaluate learner progress in achieving the stated learning objectives or mastering the competencies.

Assessment is implemented in a manner that corresponds to the course learning objectives or competencies and not only allows the instructor a broad perspective on the learners’ mastery of content but also allows learners to track their learning progress throughout the course.
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<thead>
<tr>
<th>No.</th>
<th>Text</th>
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<tbody>
<tr>
<td>3.1</td>
<td>The assessments measure the stated learning objectives or competencies.</td>
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<tr>
<td>3</td>
<td><strong>Alignment:</strong> Course assessments (ways of confirming learner mastery) are consistent with the course and module learning objectives or competencies (see Standards 2.1 and 2.2) by measuring the accomplishment of those objectives or competencies. Instructional materials (4.1), activities (5.1), and course technologies (6.1) support the learning objectives or competencies and enable learners to meet them. From the types of assessments chosen, it is clear that learners can successfully complete the assessments if they have met the objectives or competencies stated in the course materials and learning activities. As a reviewer, consider both the course and module/unit objectives or competencies in your review of assessments. Examples of learning objective or competency-assessment alignment: 1. A problem analysis demonstrates critical thinking skills. 2. A multiple-choice quiz verifies vocabulary knowledge. 3. A composition shows writing skills. 4. A video of a learner presentation in a foreign language shows mastery of the language. 5. Participation in a game reveals learner skill levels in critical thinking, analytical thinking, or decision-making.</td>
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</table>
Examples of lack of alignment between learning objectives or competencies and assessments:
1. The objective or competency is to be able to “write a persuasive essay,” but the assessment is a multiple-choice test.
2. The objective or competency is to “create a body of work that illustrates your photographic vision,” but the assessment is a 25-page thesis about contemporary photographers.

Some assessments may be geared toward meeting outcomes other than those stated in the course; for example, a course may have a writing component as part of an institution-wide writing-across-the-curriculum requirement. In that case, the reviewer should suggest including in the course the objectives or competencies that reflect the institution-wide requirement, if those objectives or competencies are not already included.

Special Situations: In some cases (check the Course Worksheet), the course objectives or competencies are institutionally mandated, and the individual instructor does not have the authority to change them. For such cases, consider the module/unit objectives or competencies to assess whether the course meets Standard 3.1.

Competency-Based Courses: Learners have flexibility in preparing for assessment of competencies, as they may have acquired competencies in a work environment or through life experience, independent study, etc.

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<tr>
<th>3.2 The course grading policy is stated clearly.</th>
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<tr>
<td>A clear, written statement fully explains how the course grades are calculated. The points, percentages, and weights for each component of the course grade are clearly stated. The relationship(s) between points, percentages, weights, and letter grades are explained. The instructor’s policy on late submissions is clearly stated.</td>
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<tr>
<td>Review the clarity of the explanation and presentation to the learner, not the simplicity or complexity of a given grading system itself. Even a relatively complex grading system can be made easy to understand.</td>
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<tr>
<td>Look for some or all of the following:</td>
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<td>1. A list of all activities, tests, etc., that will determine the final grade</td>
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<tr>
<td>2. An explanation of the relationship between the final course letter grade and the learner’s accumulated points and/or percentages</td>
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<tr>
<td>3. An explanation of the relationship between points and percentages, if both are used</td>
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<tr>
<td>4. A clearly stated policy on point deductions for assignments submitted late</td>
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<tr>
<td>3.3 Specific and descriptive criteria are provided for the evaluation of learners’ work and are tied to the course grading policy.</td>
<td>3</td>
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</table>

Learners are provided with a clear and complete description of the criteria that will be used to evaluate their work and participation in the course. These criteria are stated upfront at the beginning of the course. The description or statement of criteria provides learners with clear guidance on the instructor’s expectations and on the required components of coursework and participation. The criteria give learners the information they need to understand how a grade on an assignment or activity will be calculated.

As a reviewer, confirm that the criteria used to evaluate learners’ performance aligns with the course objectives or competencies. Note, however, that you are not asked to look for and evaluate the instructor’s specific feedback to learners in Standard 3.3. Your focus is the design of the course, not the delivery of the course.

Examples of what to look for:
1. Evidence that the instructor has stated the criteria for evaluation of all graded work. Criteria may be in the form of a detailed checklist, rubric, or other instrument for identifying the various levels of learner mastery.
2. A description of the how learners’ participation in discussions will be graded, including the number of required postings per week; the criteria for evaluating the originality and quality of learners’ comments and their responsiveness to classmates’ comments; and the grade or credit learners can expect for varying levels of performance.

Competency-Based Courses: A description makes clear in specific terms the levels of mastery required to demonstrate the defined competencies.
3.4 The assessment instruments selected are sequenced, varied, and suited to the learner work being assessed.

| 2 | Multiple assessment strategies are used in both the online and face-to-face settings, including alternative assessments that require learners to apply what they learn and to think critically. |
|   | In traditional assessments, such as those that use multiple choice, true-false, or matching, learners are asked to select a response from different options, and tests often are self-scoring. |
|   | In alternative assessments, also commonly called performance or authentic assessments, learners are asked to develop an answer in response to a prompt or stimulus, which is graded by the instructor. Such assessments may include interviews, journals, portfolios, observations, demonstrations, performance tasks, and exhibits. |
|   | Assessments are varied in order to provide multiple ways for learners to demonstrate mastery, and to accommodate diverse learners. |
|   | The assessments are sequenced so as to promote the learning process and to build on previously mastered knowledge and skills gained in this course and prerequisite courses. Assessments are paced to give learners adequate time to achieve mastery and complete the work in a thoughtful manner. |
|   | Examples that meet the Standard: |
| 1. | A series of assessments that progress from the definition of terms, to a short paper explaining the relationship between various theoretical concepts, to a term paper that includes the application of theoretical concepts and critical analysis of a journal article |
| 2. | Multiple types of assessment that enable the instructor to become familiar with an individual learner’s work and that discourage “proxy cheating” (someone other than the learner completing and submitting work) |
Examples that MAY NOT meet the Standard:
1. The assessments consist of only multiple-choice tests.
2. The first assessment requires learners to locate research materials, while library research skills and methods are not covered until later in the course.
3. No assessments are administered during the first 12 weeks of the semester, and an essay, term paper, and final exam are due during the 13th, 14th, and 15th weeks, respectively.
4. Discussion board posts are assessed on the basis of frequency or word count instead of on criteria related to the course objectives or competencies.

Circumstances affecting some graduate courses: The grade may be entirely based on a major assignment due at the end of the term. In this case, benchmarks for progress are provided during the term, with feedback from the instructor.

Examples of benchmark assignments might include submission of
1. An outline or project plan
2. A bibliography
3. A précis of the paper or project
4. One or more preliminary drafts

**Competency-Based Courses**: Assessment of competencies may not follow the pattern of assessment in traditional courses. As a reviewer, focus on whether the assessment instruments credibly establish that the learner has demonstrated the competency.

3.5 The course provides learners with multiple opportunities to track their learning progress.

2 Learning is more effective if learners receive frequent, substantive, and timely feedback. The feedback may come from the instructor directly, from assignments and assessments that have feedback built into them, or even from other learners.

Look for examples of self-check quizzes and activities, as well as other types of practice opportunities that provide timely feedback. Such assignments may be voluntary and/or allow multiple attempts.

Examples:
1. Writing assignments that allow for the submission of a draft for instructor comment and suggestions for improvement
2. Self-mastery tests that include informative feedback with each answer choice
3. Interactive games and simulations that have feedback built in
4. Self-scoring practice quizzes
5. Practice written assignments
6. Peer reviews and critiques
7. Model papers or essays provided for learners’ viewing
8. Sample answers or answer keys provided for learners’ viewing
9. Portfolios with a self-evaluation component, journals, and reflection papers
<table>
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<tr>
<th>General Standard 4 – Instructional Materials: Instructional materials enable learners to achieve stated learning objectives or competencies.</th>
<th>4.1 The instructional materials contribute to the achievement of the stated course and module/unit learning objectives or competencies.</th>
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</thead>
</table>

The focus of this Standard is on supporting the course objectives and competencies, rather than on qualitative judgments about the instructional materials.

| Alignment: The instructional materials used in the course align with the course and module learning objectives or competencies (see Standards 2.1 and 2.2) by contributing to the achievement of those objectives or competencies and by integrating effectively with the tools (6.1), assessments (3.1), and activities (5.1) selected for the course. |
|---|---|

Instructional materials may include but are not limited to textbooks, publisher- or instructor-created resources, multimedia, and websites. The materials align with the learning objectives or competencies in a clear and direct way and provide the information and resources learners need to achieve the stated learning objectives or competencies. As a reviewer, consider both the course and module/unit learning objectives or competencies in your assessment of the course’s adherence to this standard.

Decisions on this Standard may be difficult for reviewers whose expertise is not in the course discipline. Consult with the team subject matter expert (SME) and use professional judgment to determine if the instructional materials support the learning objectives or competencies.

Reviewers are encouraged to consult a digital version of the textbook, if available, as many publishers provide electronic access. In evaluating the course against this Standard, reviewers will work closely with the SME on the team.

NOTE: If the instructional materials are solely or mostly from publishers, review team members must be provided with access to all digital publisher materials to assess whether Standard 4.1 is met.

In some advanced undergraduate courses and graduate courses, no textbook(s) are assigned. Reviewers will need to consider bibliographies and webliographies provided by the instructor, or, in some cases, developed by learners themselves, following guidelines provided by the instructor. As reviewers, focus on the alignment of the instructional materials with the learning objectives or competencies and assessments rather than attempt to evaluate the content. If the learning objectives or competencies are judged to be suited to the level of the course (Standard 2.5), it is assumed instructional materials that support these objectives or competencies are also suited to the level of the course.

**Special Situations:** In some cases (check the Course Worksheet), the course objectives or competencies are institutionally mandated, and the individual instructor does not have the authority to change them. For such cases, consider instead the module/unit objectives or competencies in determining whether the course meets Standard 4.1.
| 1.5 | 4.2 Both the purpose of instructional materials and how the materials are to be used for learning activities are clearly explained. | 3 | Learners are provided with an explanation of how the instructional materials, resources, technologies, and learning activities are used in the course, and how each will help them achieve the stated learning objectives or help them prepare to demonstrate course competencies. Examples:  
1. Links to external websites indicate the purpose of the links or are completely self-evident.  
2. The function of interactive games or exercises is clearly explained or is completely self-evident.  
The purpose of all instructional materials (books and other publications, videos, multimedia, software or interactive elements, etc.) used in the course is clearly explained to learners. Reviewers confirm that instructional materials such as simulations or interactive media are integrated well enough to be useful to the learner.  
An example would be a course that requires learners to use the following materials: a textbook divided into chapters, video segments ordered by topics, a website or simulation activities organized around specific skills, and an internal or external website that has an opening menu consisting of “practice quizzes,” “images,” and “audio examples.” In such a course, consider whether the order in which learners should use these varied materials is clearly indicated, as well as how each is related to the learning objectives or competencies and activities, and how the materials are related to one another.  
In advanced undergraduate and graduate courses in which learners are expected to find their own learning materials, the instructor posts guidelines that assist the learner in identifying relevant materials and in distinguishing between core and supplementary materials and between scholarly and non-scholarly sources for academic writing. Reviewers determine whether these guidelines satisfy the Standard.  
**Blended Courses:** Instructions make clear which materials are to be used in the face-to-face classroom and which are specific to the online portion of the course. |
|---|---|---|---|
| 4.3 All instructional materials used in the course are appropriately cited. | 2 | Sources for materials used in the course are clearly identified and cited. This requirement applies to instructor-created materials, publisher materials, textbooks, images, graphic materials, tables, videos, audios, websites, and other forms of multimedia. Citations for instructional materials model the practices learners are expected to follow for documenting references. At minimum, a citation includes the author or owner name; date of publication; resource title, if supplied; and URL or source.  
When an extensive body of material comes from a single source (e.g., instructional materials from a publisher), a single citation statement suffices. Reviewers might look for citation information in a list of materials, in the course syllabus, or in another course document. |
| 4.4 The instructional materials are current. | 2 | The instructional materials represent up-to-date thinking and practice in the discipline. For example, an introductory computer course might include information on recent trends in data storage; an English writing course might discuss the purpose of Internet research; a chemistry course might include computerized models to demonstrate chemical operations.

Decisions on whether the course meets this Standard may be difficult for reviewers whose expertise is not in the course discipline. Consult with the team subject matter expert (SME) and use professional judgment to determine if the materials are current.

Older works considered “seminal” may meet Standard 4.4. The SME on the team verifies that a work is seminal in the discipline. |

| 4.5 A variety of instructional materials is used in the course. | 2 | The course presents a variety of relevant instructional materials that may include textbooks and other publications, instructor-created resources, websites, and multimedia.

Typically, a course includes multiple sources rather than material from a single author. In some disciplines, it may be appropriate to have all materials from a single author.

In reviewing instructional materials, look for evidence that learners have options for how they consume content, e.g., reading, viewing a video, listening to a podcast. If the only instructional material provided is a textbook, the Standard may not be met.

Decisions on this Standard may be difficult for reviewers whose expertise is not in the course discipline. Consult with the team subject matter expert and use professional judgment to determine whether a sufficient variety of materials is used. |

| 4.6 The distinction between required and optional materials is clearly explained. | 1 | Clear explanations are provided to learners regarding which materials and resources are required and which are optional. Instructors are expected to clearly indicate which materials learners must acquire and use to complete course activities and assignments.

Optional resources are identified as such. For example, extra videos or resources included for enrichment purposes and not required for course completion are labeled as “optional.”

Designations about required and optional materials appear in the syllabus, class schedule, or instructions for learning activities and are available from the start of the course.

**Competency-Based Courses:** In competency-based courses, all materials may be optional. The introduction specifies which materials and activities are required, supplemental, or optional. |
<table>
<thead>
<tr>
<th>General Standard 5 – Course Activities and Learner Interaction: Course activities facilitate and support learner interaction and engagement.</th>
<th>Course components that promote active learning contribute to the learning process and to learner persistence.</th>
</tr>
</thead>
</table>
| 3 | **Alignment:** The purpose of learning activities is to facilitate the learner’s achievement of the stated objectives or competencies. Learning activities align with the course and module objectives or competencies, as well as with assessments, instructional materials, and course technologies (see Standards 2.1, 2.2, 3.1, 4.1, and 6.1), by engaging learners in activities that promote mastery of the stated learning objectives or competencies. The review team is expected to review all learning activities in the course. A strategy for accomplishing the review may be to divide the activities among the review team members and reconvene to share findings. Ensure that the activities support the learning objectives or competencies and assessments.  
Examples of alignment between activities and objectives or competencies:  
1. The objective or competency requires that learners deliver a persuasive speech. Activities include choosing an appropriate topic for the speech, creating an outline, and taping a practice of the speech delivery.  
2. The objective or competency is “Prepare each budget within a master budget and explain the importance of each in the overall budgeting process.” The learners review information about this objective or competency in their texts, watch videos of case studies where the different budgets are used, review informational websites about creating the different budgets, create the different budgets as practice activities, and develop a case study for a fictitious company explaining what would happen if each budget is not included in the master budget.  
Examples of a mismatch between activities and objectives or competencies:  
1. The objective or competency requires learners to deliver a persuasive speech, but the activities in the course do not include practice of that skill.  
2. The objective or competency is “Prepare each budget within a master budget and explain the importance of each in the overall budgeting process.” The learners review information about this objective or competency in their texts and observe budgets worked out by the instructor, but they themselves produce only one of the several budgets.  
**Special Situations:** Reference Standard 2.1. The course objectives or competencies may be institutionally mandated and not measurable, and the instructor does not have the authority to change them. In this case, assess whether the learning activities promote the achievement of the module/unit-level learning objectives or competencies to determine if Standard 5.1 is met. |
| 5.2 Learning activities provide opportunities for interaction that support active learning. | 3 | Activities encourage learners’ engagement through different types of interaction as appropriate to the course. Interactions are designed as activities to support the course objectives or competencies and may vary with the discipline, purpose, and level of the course. Look for the purpose of the interactions and not just the number of opportunities for interaction.

Types of interaction include learner-instructor, learner-content, and learner-learner. Active learning involves learners engaging by "doing" something, such as discovering, processing, or applying concepts and information. Active learning entails guiding learners to increasing levels of responsibility for their own learning.

Activities for learner-instructor interaction might include an assignment or project submitted for instructor feedback; learner-instructor discussion in a synchronous session or an asynchronous discussion board exchange; or a frequently-asked-questions (FAQ) discussion forum moderated by the instructor.

Activities for learner-content interaction might include assigned reading from a textbook, article, or online resource; assigned completion of a workbook or online exercise; or a learning-how-to-learn activity.

Activities for learner-learner interaction might include assigned collaborative activities such as group discussions; small-group projects; group problem-solving assignments; or peer critiques.

Look for opportunities for learner-instructor interaction, learner-content interaction, and, if appropriate to the course, learner-learner interaction. Refer to the Course Worksheet to determine whether or not opportunities for learner-learner interaction are appropriate to the course.

Note: Reviewers’ evaluations of the types of interactions designed into the activities are based on the nature of the course and not on personal preferences. Learning environments usually are broader than a single course and may include informal networks that are beyond the scope of a QM review.

**Blended Courses:** In courses that use both online and face-to-face settings, the learning activities that occur in these two settings are connected by a common thread or theme and are mutually reinforcing. The connection and reinforcement are made clear to learners. For example, the different parts of a particular activity might be sequenced in an alternating way in online and face-to-face meetings of the course.

**Competency-Based Courses:** In competency-based courses, the interaction with the instructor, facilitator, coach, mentor, or assessor may take different forms. Learner-learner interaction in discussion forums is encouraged but may be limited by the differential pace of individual learners; and other forms of learner-learner interaction may be impractical, as learners prepare in different ways for assessment of their competencies. Communication through program-level, learner-learner forums is a viable alternative to course-based forums. |
<table>
<thead>
<tr>
<th>5.3 The instructor’s plan for classroom response time and feedback on assignments is clearly stated.</th>
<th>3</th>
<th>Frequent feedback from the instructor increases learners’ sense of engagement in a course. Learners are better able to manage their course activities when they know upfront when to expect feedback from the instructor. The course provides clear information about when learners will receive instructor responses to emails and discussion postings, feedback on assignments, and grades. This information typically appears in the course syllabus. If it is necessary to alter the response-time standards during the course, the adjustment is clearly communicated to learners. Note to reviewers: You are not evaluating the instructor’s plan; you are primarily ensuring the instructor has provided a plan. If you have suggestions for how to improve the plan, you might include them in your recommendations; but the suggestions should not affect your decision about whether the Standard is met. <strong>Competency-Based Courses:</strong> Interaction with the instructor, facilitator, coach, mentor, or assessor may take different forms. The course introduction indicates the various forms of faculty and staff support available to the learner and explains when learners can expect to receive feedback.</th>
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<tr>
<td>5.4 The requirements for learner interaction are clearly stated.</td>
<td>2</td>
<td>A clear explanation of the requirements for learner interaction helps learners plan and manage their class participation and is important for promoting learners’ active involvement in the course. The statement of requirements also provides a basis for the instructor to evaluate learner participation. The more specifically the expectations are explained, the easier it is for the learner to meet the expectations. Clearly explaining the role of the instructor and expectations for interactions with the instructor and with other learners is especially helpful to learners from cultures in which deference to the instructor is customary and who may need encouragement to “speak up.” Look for a clear, prominently placed statement of the instructor’s expectations for learner participation in required course interactions (frequency, length, timeliness, etc.). Typically, expectations for learner participation are stated in the course information page or syllabus. These requirements may specify the nature of the required participation and expectations for frequency and quality of the learner’s interactions. More specific, task-related performance expectations may be included in the individual task description. The instructor may also provide rubrics detailing how learner interactions are evaluated, including reading and responding to the instructor’s and classmates’ posts.</td>
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<td><strong>General Standard 6 – Course Technology:</strong> Course technologies support learners’ achievement of course objectives or competencies.</td>
<td>The technologies enabling the various course components facilitate rather than impede the learning process.</td>
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<tr>
<td>6.1 The tools used in the course support the learning objectives or competencies.</td>
<td>3</td>
<td><strong>Alignment:</strong> The tools selected for the course align with the course and module objectives or competencies (see Standards 2.1 and 2.2) by effectively supporting the course’s assessment instruments (3.1), instructional materials (4.1), and learning activities (5.1). Tools are functional software that provide areas for interaction in the course; they may be included in the learning management system (LMS) or external to the LMS. Examples of tools are discussion boards, chat rooms, grade book, social media, games, whiteboard, wikis, blogs, virtual classrooms, web conferencing, etc. Specific tools are not required for this Standard to be met. Tools that are used support the learning objectives or competencies and fit the learning activities. Clear information and instructions are provided regarding how the tools support the learning objectives or competencies. Technology is not used simply for its own sake. For example, a course might require posting to a discussion forum, but it may not be clear how the discussions support a learning objective or competency. <strong>Special Situations:</strong> In some cases (check the Course Worksheet), the course objectives or competencies are institutionally mandated, and the individual instructor does not have the authority to change them. For such cases, consider instead the module/unit objectives or competencies to assess whether Standard 6.1 is met.</td>
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<td>6.2 Course tools promote learner engagement and active learning.</td>
<td>3</td>
<td>Tools used in the course help learners actively engage in the learning process rather than passively absorb information. Selected tools help the learner actively engage in the course by facilitating interactions with the instructor, course materials, and other learners. Examples of tools that support engagement and active learning: 1. Interactive, real-time software, such as real-time collaborative tools, webinars, and virtual worlds 2. Software that facilitates interactions and collaborations, such as shared documents or wikis 3. Animations, simulations, and games that require learner input 4. Discussion tools with automatic notification or a &quot;read/unread&quot; tracking feature 5. Automated self-check exercises requiring learner responses</td>
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</table>
| 6.3 Technologies required in the course are readily obtainable. | 2 | All required technologies are easily obtainable, through download, purchase at the bookstore, or another means. The word “technologies” covers a wide range, including hardware, software, subscriptions, and plug-ins.  

The hardware and peripherals necessary to complete all course activities are obtainable. Peripherals include webcams, microphones, etc. If specific peripheral devices are needed for course completion, instructions are provided on how to obtain the peripheral devices.  

The software chosen for the course is easily obtainable via download and available on a variety of hardware platforms (Windows, MacOS, etc.) If software is platform-specific, an equivalent software package is available for learners not using that platform. Examples of software include word processors, spreadsheets, presentation software, statistical analysis software, equation editors, web authoring tools, audio/video editing tools, programming software, etc. Learners are able to obtain online tools and plug-ins, such as Acrobat Reader, Flash, Java, media players, MP3 players, wikis, social media, etc.  

When web-based technologies are used, including learning management systems, information is provided regarding the availability of the tools on mobile devices (smartphones and tablets). For technologies that require subscriptions, instructions are provided on how to obtain the subscription, including information on acquisition of access codes and user identification requirements.  

Look for evidence that guidance is provided to learners on compatible alternatives to platform-specific peripherals, software packages, and other web-based technologies.  

Examples of information to provide:  
1. If the software runs on both Mac and PC  
2. If the institution has an application server that allows learners to use the software online  
3. Which features of the learning management system are accessible on a mobile device. (For instance, learners are allowed to participate in discussion boards from a mobile device, but quizzes and tests cannot be taken on a mobile device.)  

Examples of how to help ensure learner access:  
1. Links are provided to required peripherals to be purchased from the college bookstore or other source.  
2. Links are provided that allow learners access to necessary course documents.  
3. Instructions are provided on how to access materials available through subscriptions to online journals or databases. When feasible, links are also provided.  
4. For textbooks, CDs, and DVDs, information provided includes the title, author, publisher, ISBN number, copyright date, and details on where copies can be obtained.
6.4 The course technologies are current.

1. New technologies continuously appear on the market. Confirm that course technology is up-to-date. Look for evidence of appropriate incorporation of tools such as social media, mobile technologies, games, simulations, wikis, blogs, podcasts, and virtual worlds in the course’s online and technology-supported design. Courses not recently developed may need to be updated.

Examples of current technology that may be used in support of the course objectives or competencies to enhance learning:

1. Synchronous web conference tools used for orientation, group projects, tutoring, test reviews, etc.
2. A mobile application that learners use to identify plants in a botany course
3. A wiki used for group collaboration
4. Blogs used for student journals
5. A simulation that demonstrates something not feasible to demonstrate in the physical world, such as a process or procedure that takes place inside a hazardous or inaccessible place
6. A simulation replicating laboratory activities that allows manipulations of objects on the screen similar to hands-on lab experiences
7. Web-based voice tools used by English-as-a-Second-Language (ESL) instructors and learners to practice pronunciation, vocabulary, etc.

The course design takes advantage of tools in the learning management system, incorporating features that support learning objectives and competencies (see 6.1 regarding learning objectives or competencies).

As a reviewer, keep in mind that the tools available to an instructor may vary greatly from institution to institution and are sometimes limited by the access and support provided by the institution.
<table>
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<tr>
<th>6.5 Links are provided to privacy policies for all external tools required in the course.</th>
<th>1 Tools used in the course, whether included in the learning management system (LMS), integrated with the LMS, or external to the LMS, include links to the privacy policies provided by the creator of the tool. If the learner is required to create an account with a username and password to access a tool, the privacy policy is available for learners to read and use to safeguard their accounts. As a reviewer, look for tools that are external to the LMS and links to privacy policies for those tools. For example, links are provided to the privacy policies of social media and third-party websites being used. Check the Course Worksheet for information relevant to this standard.</th>
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<tr>
<td><strong>General Standard 7 – Learner Support:</strong> The course facilitates learner access to institutional support services essential to learner success.</td>
<td>It is important to ensure online learners know they have access to and are encouraged to use the services that support learners at the institution. In the Learner Support Standard, four different kinds of support services are addressed: technical support, accessibility support, academic services support, and student services support.</td>
</tr>
<tr>
<td>7.1 The course instructions articulate or link to a clear description of the technical support offered and how to obtain it.</td>
<td>3 Technical support for learners differs from institution to institution and includes such information as how to log in; how to use the tools and features of the learning management system; and how to get help desk support. Technical support does not include help with course content or assignments or academic or support services (see Standards 7.3 and 7.4). Look for evidence that learners have access to technical support services from within the course or the learning management system. The purpose is not to review the adequacy of those services at an institutional level but rather to determine if technical support services are provided for learners and that the course contains information about the services and how to access them. Examples of information about technical support:</td>
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<td>1. A clear description of the technical support services provided by the institution, including a link to a technical support website</td>
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<td>2. An email link to the institution's technical support center or help desk</td>
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<td>3. A phone number for the institution's technical support center or help desk</td>
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<td>4. Clearly worded directions for obtaining support for externally provided resources (e.g., publisher-supplied online materials and activities and third-party, vendor-provided software, materials, and activities)</td>
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<td></td>
<td>5. Links to tutorials or other resources providing instructions on how to use the tools and features of the learning management system and other course technologies</td>
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<td>6. A link to &quot;frequently asked questions&quot;</td>
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</table>
| 7.2 Course instructions articulate or link to the institution’s accessibility policies and services. | 3 | Accessibility policies or accommodation statements state that services and accommodations are available for learners with disabilities and inform the learner how such services may be obtained.  
To meet this Standard, the course may include  
1. A link to the institution's accessibility policy, if a policy exists  
2. A statement that informs the learner how to obtain an institution's disability support services, if such services exist; for example, a telephone number or link for the disability services office  
If the institution does not have an applicable disability policy or disability services, the instructor may provide a policy that will be adhered to in the course to assure that learners with disabilities will be accommodated. |
| 7.3 Course instructions articulate or link to an explanation of how the institution’s academic support services and resources can help learners succeed in the course and how learners can obtain them. | 2 | Academic support services and resources, and the scope of what they entail, differ from institution to institution. For the purposes of review, academic support services and resources may include an online orientation; access to library resources; a readiness assessment or survey; testing services; tutoring; non-native language services; writing and/or math centers; tutorials or other forms of guidance on conducting research, writing papers, citing sources, using an online writing lab, and using course-specific technology; supplemental instruction programs; and teaching assistants.  
Look for evidence that learners have access to academic support services and resources from within the course or the learning management system. The purpose is not to review the adequacy of these services and resources on an institutional level but rather to determine if academic support services and resources are provided for learners and if the course contains information about the services and how to access them.  
Examples of features that connect learners with academic support services:  
1. Links to academic support services and how to obtain these services (e.g., location of testing center and/or proctored test sites, hours of operation, phone numbers and email addresses for key personnel)  
2. Links to online orientations or demo courses  
3. A link to the library, including information on how to gain access to library materials and databases, and how to contact a librarian  
4. A link to tutorials or guides on conducting research, writing papers, and citing sources |
| 7.4 Course instructions articulate or link to an explanation of how the institution’s student services and resources can help learners succeed and how learners can obtain them. | 1 | Student services and resources differ from institution to institution. For the purposes of this review, support services and resources include advising, registration, financial aid, student or campus life, counseling, career services, online workshops, and student organizations. Look for evidence that learners have access to support services from within the course or the learning management system. The purpose is not to review the adequacy of the services on an institutional level but rather to determine if information about support services and how to obtain them is provided in the course. The course may provide the following: 1. A clear description of support services and how to obtain them (including email addresses and phone numbers for key personnel) 2. Guidance on when and how learners may obtain a particular support service or resource (for example, when and how to meet with an academic advisor) |

**General Standard 8 – Accessibility and Usability:** The course design reflects a commitment to accessibility and usability for all learners. | The course design reflects a commitment to accessibility, so that all learners can access all course content and activities, and to usability, so that all learners can easily navigate and interact with course components. |
8.1 Course navigation facilitates ease of use.

3 Navigation refers to the process of planning, controlling, and recording the movement of a learner from one place to another in the online course. Navigation throughout the course is consistent, logical, and efficient. Confirm that the course’s navigation strategies facilitate ease of movement through the course and course activities.

As a reviewer, also consider the ownership of the design of course navigation features. Some navigation devices—"next" and "previous" links, for example—are in the learning management system and cannot be modified. The Course Worksheet provides information about navigation features that cannot be changed. Other navigation devices—hypertext links, icons, and window functions, for example—may be within the control of the instructor.

Examples of strategies that facilitate ease of use:
1. Consistent layout and design are employed throughout, making content, instructional materials, tools, and media easy to locate from anywhere in the course. Design elements are used repetitively, increasing predictability and intuitiveness.
2. Course pages have links, files, and icons that are labeled with easy-to-understand, self-describing, and meaningful names. Icons used as links also have HTML tags or an accompanying text link.
3. The course design enables learners to easily locate where they are within the course and to easily return to the home page from any location.
4. Tables are used to organize data and have appropriate table headers. Data cells are associated with their appropriate headers, making it easy for learners to navigate and understand the data.
5. The hierarchy of material in a page or document is clearly indicated through heading styles (Heading 1, Heading 2, etc.). A table of contents can be included that allows learners to move easily throughout documents.
<table>
<thead>
<tr>
<th>Section</th>
<th>Text</th>
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<tbody>
<tr>
<td>8.2</td>
<td>Information is provided about the accessibility of all technologies required in the course.</td>
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<td>3</td>
<td>Learners with disabilities have access to information on the accessibility of the learning management system and all additional required technologies. For this Standard to be met, the course includes links to the accessibility statements for all required technologies. If an accessibility statement does not exist for a particular technology, a statement is included that explains that the accessibility statement does not exist. Examples of technologies that might be required in an online course: 1. A learning management system, including integrated third-party software 2. Presentation software 3. A web-conferencing tool 4. A polling tool 5. A lecture-capture system 6. One or more media players 7. A document-sharing system 8. Social media tools Examples of where the accessibility statements may be located within the course: 1. Course syllabus 2. Page on required technology software 3. Page on resources</td>
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<td>Section</td>
<td>Text</td>
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<td>8.3</td>
<td>The course provides alternative means of access to course materials in formats that meet the needs of diverse learners.</td>
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<td>2</td>
<td>The course provides alternatives to all non-text content so that all learners have access to equivalent information. The Standard is met if the equivalent textual representations are located or linked within the course. In instances where alternative formats are provided, the general accuracy of the alternate content is verified. For example, if captions are provided for a video, the reviewer can view some of the captions to confirm that the captions correctly represent the audio content.</td>
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<td>Examples of non-text content and options for equivalent textual representation:</td>
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<td>1. Video and animations are captioned, or text transcripts are readily available. If the audio content corresponds with the visual content in a way that conveys meaning (e.g., a video demonstrating how to operate a Bunsen burner in a chemistry lab), captions provide an equivalent experience. If the audio content does not correspond with visual content (e.g., a visual of an instructor providing a lecture without visual aids), then a text transcript is sufficient.</td>
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<td>2. Visual information, including images, graphs, and tables, are described via an alt-tag, long description, caption, or audio description.</td>
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<td>3. Tables are set up with headings for columns and rows.</td>
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<td>4. Document or HTML titles, headings, etc., are formatted using styles found in the word processing software (such as Word) style gallery; they do not merely utilize a larger or bold or italic font.</td>
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<td>5. PDFs that contain text are not merely image scans; any text contained in PDFs is selectable and searchable.</td>
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<td>6. Colors alone are not relied on to convey meaning. The meaning is also conveyed in another way that does not require perceiving different colors.</td>
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<td>When alternative formats are provided, verify the general accuracy of the alternate content. Verification is important because not all attempts to provide alternate formats meet the goal of providing equivalent access for diverse learners.</td>
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<tr>
<td>Section</td>
<td>Description</td>
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<tr>
<td>8.4 The course design facilitates readability.</td>
<td>Course design elements maximize usability by facilitating readability and minimizing distractions.</td>
</tr>
<tr>
<td>8.5 Course multimedia facilitate ease of use.</td>
<td>Course elements maximize usability by ensuring multimedia used as a vehicle for content or feedback (e.g., images, audio, animation, video, and interactive components) are easy to use, intelligible, and inter-operational across devices.</td>
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<th>hand shapes and movement.</th>
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<tr>
<td>Interactive elements integral to the content are cross-platform (PC, Mac) and cross-browser, or guidance is provided about the best browser to use.</td>
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