

CE Application, Step-by-Step

ALLOW AT LEAST TEN (10) WORKING DAYS FOR PROCESSING

Demographic Data:

Title of Activity: Date Form Completed:

Is this activity a regularly scheduled series (RSS) such as grand rounds, case studies, journal club, tumor board, etc?

Yes ←

No

If "yes", how often will the RSS be offered?

Weekly

Monthly

Quarterly

Other (Describe)

If this activity is a RSS, what type?

Grand rounds

Case reviews/studies

Journal club

Tumor board

Other (Describe)

If this activity is a RSS, what is the first date it will be offered?

If not RSS, select Activity Type:

Provider-directed, provider-paced: Live (in person or webinar) ←

Date of live activity (if offered more than once, provide all anticipated dates):

Location of live activity. Venue:

City/state:

Provider-directed, learner-paced: Enduring material

Format: Online Website:

Print

CD-ROM, DVD

Start date of enduring material:

Expiration/end date of enduring material:

Performance Improvement Project: Provider-directed, learner-paced PI project based on clinical data.
CONTACT IPCE OFFICE. This form is not intended for PI CE.

Course Director* for this activity.

Name and credentials:

Contact Information:

The ***Course Director** is the individual that takes the **lead role** in assessing the learning need, planning, implementing and evaluating this continuing education activity. If the Course Director is a nurse, they must hold a current RN license and have a baccalaureate degree (BSN) or higher in nursing.

The key to the definition of RSS is that it is given on a regular basis **AND** that the audience is always the same. Thus, department grand rounds or journal clubs are ideal.

If it is the same educational content delivered to a different audience on more than one date, it is **NOT** RSS. We must manage each occurrence separately.

Assessment of Learner Needs:

Fees are associated with activities and will be assessed based on type of credit and number of learners. Contact IPCE with questions.

Identify target audience (Check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> Physician | <input type="checkbox"/> Physical Therapist |
| <input type="checkbox"/> Registered Nurse | <input type="checkbox"/> Occupational Therapist |
| <input type="checkbox"/> Advanced Practice Nurse | <input type="checkbox"/> Nutrition/Dietician |
| <input type="checkbox"/> Physician Assistant | <input type="checkbox"/> Speech Therapist |
| <input type="checkbox"/> Respiratory Therapist | <input type="checkbox"/> Psychologist |
| <input type="checkbox"/> Social Worker | <input type="checkbox"/> Audiologist |
| <input type="checkbox"/> Pharmacist | |
| <input type="checkbox"/> Pharmacy Technician | |

“Specialty credit” could include professions for which Rush is not accredited, i.e. Radiologic Technologists or Sonographers. We can obtain these for you.

What type of credit are you applying for (Check all that apply)?

- Continuing Medical Education (CME)
- Continuing Nursing Education (CNE)
- Continuing Pharmacy Education (CPE)
- Continuing Education (CE for other professions indicated above)
- Specialty Credit (if applicable, specify - i.e. American Society of Radiologic Technologists):

Generally, only one of these will apply.

Estimated number of participants:

Internal Users (Rush Employees)
External Users

Professional Competency: Indicate from the list below which Institute of Medicine (IOM) interprofessional core competency(s) most closely relate(s) to the intended learner outcome of this educational activity. **Select all that apply.**

- Provide patient-centered care** Identify, respect, and care about patients’ differences, values, preferences, and expressed needs; relieve pain and suffering; coordinate continuous care; listen to, clearly inform, communicate with, and educate patients; share decision making and management; and continuously advocate disease prevention, wellness, and promotion of healthy lifestyles, including a focus on population health.
- Work in interdisciplinary teams** Cooperate, collaborate, communicate, and integrate care in teams to ensure that care is continuous and reliable.
- Employ evidence-based practice** Integrate best research with clinical expertise and patient values for optimum care, and participate in learning and research activities to the extent feasible.
- Apply quality improvement** Identify errors and hazards in care; understand and implement basic safety design principles, such as standardization and simplification; continually understand and measure quality of care in terms of structure, process, and outcomes in relation to patient and community needs; design and test interventions to change processes and systems of care, with the objective of improving quality.
- Utilize informatics** Communicate, manage knowledge, mitigate error, and support decision making using information technology.

For all learners:

What is the gap(s) between current practice or outcome(s) and desirable or achievable practice or outcome(s)? Identify the practice gap that this educational activity will address and briefly describe. (i.e.

High rate of complications among diabetes patients. Select one and describe.):

- Gap in knowledge of the target audience (knowledge base). Describe: _____
- Gap in skills of the target audience (performance in practice). Describe: _____
- Gap in practice of the target audience (patient outcomes, faculty/student-related outcomes, professional development outcomes, etc). Describe: _____
- Other - Describe: _____

How was the above practice gap identified? Select the type of needs assessment method used to educational activity. (Check all that apply.)

- Surveying stakeholders, target audience members, subject matter experts, etc.
- Requesting input from stakeholders such as learners, managers, or subject matter experts.

Ask yourself, "What am I seeing in practice that I **shouldn't** be seeing?" Or "What **should I be seeing** in practice and I'm not seeing it?" Keep it simple! A sentence or two will do.

IPCE Application - 2018

4

- Reviewing quality studies and/or performance improvement activities to identify opportunities for improvement.
- Reviewing evaluations of previous educational activities.
- Reviewing trends in literature, law and health care (i.e. Institutes of Medicine, or National Institute of Nursing Research)
- Other (Can include observation by subject matter experts) - Describe: _____

Check if the needs assessment data is attached (e.g., survey data, reference in literature, QI data, etc.)
Needs assessment data must be available upon request if the data does not accompany this planning form.

This table is meant for a short, one-off event. If all of the content will not fit on this table (for, say, a full-day meeting), then write a set of global learning objectives here. Under "content" below, write "see attached" and send the full agenda as an attachment.

Objective	Time	Faculty/Presenter	Teaching method	Learner
List learner's objectives in behavioral terms. (What will the learner do in his/her practice after this course?)	State the time frame for each objective, if applicable. (Total should be length of/credit for entire activity.)	List the faculty for the activity.	Describe the teaching methods, strategies, materials & resources (i.e. lecture, discussion, Q & A, handouts, case reviews, slides)	List or describe learners provided (i.e. Q & discussion, return of role play)
<i>EXAMPLE: Incorporate nutritional medicine into individualized patient care plans.</i>	<i>EXAMPLE: 30 minutes</i>	<i>EXAMPLE: Dr Jones</i>	<i>EXAMPLE: Lecture with interactive questions on audience response system.</i>	<i>EXAMPLE: Respondents and course evaluation</i>
TOTAL				

Based on the total amount of time the learner will spend to complete the educational activity, it is eligible for [] number of credits/contact hours. (For RSS, enter credit(s) for a single event.)

Content:
Description of the content of this activity that will be provided to meet each learning objective []

-OR-
 Content of the activity is provided with this application (i.e. slide presentations, monographs, etc.)

Successful Completion is documented by (Check all that apply):
 Attendance at entire event or session

The "Total" is here for time, since most forms of CE credit are calculated by time. For example, one contact hour = 1 CME credit. Make your best estimate, and we will confirm your calculation based on the type of professional credits you're requesting.

Qualified Planners and Faculty/Presenters/Authors/Content Reviewers

Complete the table below for each person on the planning committee and include name, credentials, educational degree(s), and role on the planning committee. The Course Director is knowledgeable of continuing education accreditation standards and process, and is responsible for adherence to the ACCME, ACPE, ANCC and/or IDFPF criteria. One planner needs to have appropriate subject matter expertise for the educational activity being offered. The Course Director and content expert(s) must be identified. All interprofessional activities need at least two planners, they must represent different professions, and the planners can also be course faculty.

For Continuing Nursing Education credit, planning committees must have a minimum of one registered nurse with a BSN or higher in nursing. For Continuing Medical Education or Continuing Pharmacy Education credit, it is recommended that a planning committee have a minimum of one physician planner and/or pharmacist planner.

Employees or representatives of pharmaceutical or medical device companies are NOT permitted to plan any continuing education activities.

On rare occasions, the employee of a pharmaceutical or device company may act as faculty.

Planning Committee:

Committee Member Name	Credentials/Faculty Appointment	Degrees	Role on Committee (check all that apply)
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert
			<input type="checkbox"/> Course Director <input type="checkbox"/> Planner <input type="checkbox"/> Content Expert

For an activity to be interprofessional, you should have faculty and/or planners from more than one profession. That does **not** mean physicians from *multiple disciplines* (i.e. one MD from Oncology and another MD from Cardiology). Rather, it means two or more *professions* (i.e. one MD and one clinical nutritionist.)

Nursing is the profession that requires at least one nurse with BSN or higher to be on the planning committee in order to grant professional credit. A nurse may or may not be on faculty, but must be part of planning.

ALL individuals in a position to control content **MUST** disclose relevant financial relationships that present an actual or potential conflict of interest.

A Disclosure Form for **each planning committee member** is attached.

Identification, evaluation and resolution of conflict of interest for planning committee

Does the Course Director(s) have a relationship with a commercial interest organization that could influence the content of this educational activity:
 Yes* No

*Provide name of the individual responsible for reviewing conflict of interest information for Course Director(s). (The Course Director **may not** evaluate his/her own conflict of interest information. An IPCE office staff member or planning committee member can review the Course Director(s) for actual or potential conflict of interest.)

The Course Director(s) Disclosure Form(s) was reviewed for actual or potential conflict of interest: Yes No

All actual or potential conflicts of interest were resolved: Yes No

Faculty/Presenters/Authors:

Faculty/Presenters/Authors must have documented qualifications that demonstrate their education and/or expertise in the content area they are presenting. Expertise in subject matter can be evaluated based on education, professional achievements and credentials, work experience, honors, awards, professional publications, etc. The qualifications must address how the individual is knowledgeable about the topic and how expertise has been gained. Faculty/Presenters/Authors do not have to be nurses, physicians, or other licensed professionals but nurses should address nursing care and nursing implications per the ANCC guidelines, as applicable. Disclosure Forms must contain information specific to this activity. Faculty/Presenters/Authors may also be members of the planning committee. For an activity with more than 10 faculty members/presenters/authors, please enter "see attached" in the table below, and provide a complete separate list.

Faculty/Presenter/Author Name	If Rush employee: Credentials and Faculty Appointment/Position	If NOT a Rush employee, degrees/credentials (Current CV must be provided)

Disclosure Form for each Faculty/Presenter/Author is attached.

Planning committee assures the qualifications of the Faculty/Presenters/Authors are appropriate and adequate by (Check all that apply):

- Review of resume/CV of faculty/presenter/author.
- Recommendation by colleagues.
- Review of literature written by faculty/presenter/author.

All actual or potential **conflicts of interest must be resolved prior to the education occurring**. Usually, this is done by the Course Director. If the Course Director has a potential conflict, that conflict can be resolved by another non-conflicted planning committee or faculty member.

Please read these definitions carefully. Some or all of your support might not require tracking by IPCE.

Financial Requirements

Rush University is responsible for all financial decisions related to any qualified continuing education activity through the office of IPCE. The IPCE office must review and approve all decisions in concert with course leadership regarding the disposition and disbursement of commercial support in accordance with ACCME, ACPE, ANCC and IDFPF criteria.

Please review these definitions, then answer the questions below.

A *commercial interest* is defined as any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients, or an entity that is owned or controlled by an entity that produces, markets, re-sells or distributes health care goods or services consumed by, or used on, patients. Exceptions are made for non-profit or government organizations and non-health care related companies.

Commercial support is financial or in-kind contributions given by a commercial interest, and which is used to pay all or part of the costs of a CME, CNE or CPE activity.

A *sponsor* is identified as an organization that does not meet the definition of commercial interest. Sponsorship is financial or in-kind contributions given by an entity that is not a commercial interest, which is used to pay all or part of the costs of a CME, CNE or CPE activity.

Commercial *exhibitors*, along with *advertisers*, are considered commercial promotion, and their proximity to continuing education must be managed in accordance with accreditation criteria. Commercial promotion material or product-specific advertisement of any kind is prohibited in or during CE activities.

Will you be using, or is there a possibility you will be using, any of the following mechanisms to fund your CE activity? (Check all that apply.)

- Educational grants
- Exhibit space
- In-kind donations (i.e. imaging equipment, medical devices)
- Monetary donations
- Sponsorship
- Registration fees
- Advertising fees
- Other - Describe

If you selected any of the above funding mechanisms, additional support from the IPCE office is required. Documentation requirements including but not limited to the following will be communicated to you.

Check the box to agree:

- Must be a Letter of Agreement, Memo of Understanding, or other document with the signature of the individual who is legally authorized to enter into contracts on behalf of the provider of commercial support or sponsorship, and name and address of the individual legally authorized to enter into contracts on behalf of Rush.
- Supporter or sponsor may not participate in any component of the educational activity, including:

Our accreditation criteria require us to oversee the distribution of any form of support provided by a commercial interest. We are not required to collect your funds, but we must document their use.

Disclosures Provided to Participants

Learners must receive disclosure of required items prior to the start of an educational activity. In live activities (including RSS or Grand Rounds), disclosures must be made to the learner prior to initiation of the educational content. In enduring materials (print, electronic, or Web-based activities), disclosures must be visible to the learner prior to the start of the educational content. Required disclosures may not occur or be located at the end of an educational activity. If a disclosure is provided verbally, an audience member must document both the type of disclosure and the inclusion of all required disclosure elements.

Disclosures always required include:

- Successful Completion, including the purpose and/or objectives, and criteria for claiming credit;
- Absence or Presence of Conflict of Interest for planners and faculty/presenters/authors/content reviewers;
- Commercial support in the form of unrestricted educational grants, whether financial or in-kind;
- Sponsorship in the form of financial or in-kind contributions from a non-commercial interest;
- Non-endorsement of products statement in relation to any materials discussed/displayed in conjunction with this activity;
- Expiration date (only applicable when awarding enduring materials credit).

IPCE Application - 2018

11

Learners will be informed of all of the applicable items above by (Check all that apply)

- Information on advertising material.
- Written information on handouts for activities/directions (Attach copy).
- Written information on frontispiece of enduring material activities/directions.
- Verbal statement (including audience member who will witness and document).
- Information provided on slides. (Attach copy)
- Other - Describe: _____ (Attach copy)
- No products are being discussed/displayed. (No statement needed.)

Learners must always be told at least three things before the education begins:

- 1) How to complete the activity and claim credit;
- 2) What did the planners and faculty disclose (even if there is nothing to disclose, learners must be told explicitly that there is nothing to disclose);
- 3) What commercial interests provided financial or in-kind support for the education.