DUKE CONTINUING EDUCATION PLANNING MONTHLY SERIES 2024

Live and Enduring Activity Applications
Attendance

Text DEPSUP to 919.213.8033 & send (active for 24h only)

- Learner Expectations to Assure Attendance is Documented:
  - Duke CE Profile must be activated & confirmed with your mobile number to use Text Attendance SMS

Participants MUST have an active OneLink & Duke CE Ethos Account PRIOR to the activity to attend & claim education credits.

Verify your account has accurate email and phone number to assure you receive credit.

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<td>5. Click Verify Email</td>
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<td>7. Click Ok to proceed</td>
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*If you do not have a BOARD NAME or DIPLOMATE NUMBER, please skip

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https://duke.zoom.us/j/96479810179
Meeting ID: 964 7981 0179

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7. Create username, password, security question
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Duke Health Clinical Education and Professional Development is accredited by the International Association for Continuing Education and Training (IACET), and is authorized to issue IACET CEU, and authorized by IACET to offer 0.1 CEUs for this program.
Topics for Discussion

• Approval Expectations
• Live Activity
• Enduring Activity
• Requirements to maintain your approval
The Mission of The Continuing Education Department is to act as consultants in the Development, Propagation, and Implementation of Educational Programming for the Duke University Health System and its esteemed affiliates. We ensure that all Education is rooted in evidence-based practice, Health System Data, and equitably benefits/impacts all members of the Health Care Team.
### Policies

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<th>Accreditation Statement</th>
<th>Duke Clinical Education is Jointly Accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing education for the health care team.</th>
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<td>Attendance Records</td>
<td>Must record &amp; verify participation for six years from the date of the activity.</td>
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<tr>
<td>Activity Documentation</td>
<td>Must retain activity files of the planning &amp; presentation during the current accreditation term or for the last 12 months, whichever is longer.</td>
</tr>
<tr>
<td>Subject to Review</td>
<td>All activities will be subject to review by the ACCME accreditation process as verification of fulfillment of the ACCME accreditation requirements.</td>
</tr>
<tr>
<td>Content Validity of Enduring Materials</td>
<td>Must review enduring material at least once every 3 years or more if indicated by new scientific developments. The review date must be included on enduring material along with original release date &amp; a termination date.</td>
</tr>
<tr>
<td>HIPAA</td>
<td>Materials for classes &amp; reaccreditation must be HIPAA compliant.</td>
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## Approval Expectations

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<td><strong>ACCME Standards</strong></td>
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<td><strong>Content Validation and Review/Educational Materials</strong></td>
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<td>- Recommendations must be based on evidence</td>
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<td>- HIPPA &amp; copyright compliant</td>
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<td><strong>Safeguards against Commercial Bias</strong></td>
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<tr>
<td>- Content, activities &amp; materials must not be promoted by a commercial interest</td>
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<td>- Financial relationships of the planning committee &amp; presenters will be disclosed to learners prior to the activity</td>
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<tr>
<td>- Planning committee &amp; presenters must complete a disclosure prior to the activity and ineligible relationships 'resolved' prior to the activity</td>
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<td>- Vendor Policies – Duke and ACCME</td>
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<tr>
<td><strong>Grants &amp; Funding/Commercial Support</strong></td>
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<tr>
<td>- Must be reviewed by this office</td>
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<tr>
<td><strong>Promotional Support</strong></td>
</tr>
<tr>
<td>- <a href="#">Advertising Requirements for CE Activities</a></td>
</tr>
<tr>
<td>- Promotional support must be shared with this office</td>
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<tr>
<td><strong>Measurements of Effectiveness</strong></td>
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<tr>
<td>- Participants must receive an evaluation</td>
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</table>
Live Activity

What is live Activity? An activity learners can participate in real-time at a specific date/time.

The Requirements to maintain credit
• Updated Agenda
• Updated Budget
• Hold Harmless agreements (if needed)
• Roster with first name, last name and email address
• Requirements for CNE’s
Live Course Checklist & CNE Course File Items

Live Course Checklist

Please refer to the Course Admin Resources listed under the Help Center on the Duke CE&PD Website to find instructional materials and other required documents.

Prior to Submitting the Application
- Activity Agenda: A detailed breakdown of the entire program with start and end times for each session. No credit awarded for breaks, luncheons, welcomes, intros. Please reference CE Agenda Example in the Course Admin Resources.
- Activity Budget: Including all expenses, all projected income from grant support, registration fees, and vendor fees.
- Grant Funding: If your event involves grant funding, please submit all grants as soon as possible.
- Disclosure Forms: All disclosures should be complete before submitting the application. Please track disclosures via the Disclosure Dashboard and reach out to confirm any outstanding disclosures that still need to be completed.

8 Weeks before the Activity/Program
- Agenda & Speakers: MUST be finalized. Last minute changes lead to issues that could result in the loss of credit.
- Marketing Materials: Including brochures, “Save the Date” flyers, and website announcements. Marketing must be approved and contain the correct accreditation statement, logo(s), and Credit Amount. You may not promote an activity until you have the Finalization letters.
- Grant Agreements: Signed and Co-Signed by Duke CE. (You may not provide grant information or marketing materials/financial unless the Duke CE Office has fully executed the grant agreement)
- Hold Harmless Agreements: All exhibitors must sign an agreement, this is not negotiable, nor are the terms of the agreement. Please remember that we must follow ACCME and Duke University Health System rules as well.
- Registration Letter: You will receive once the Duke CE Office has all of the required elements (Above) and the application.

2 weeks before the Activity/Program
- Presentation Materials: Speakers should begin submitting their presentations for review. Presentations are due NO LATER than one week (7 days) prior to the activity/program. The Duke CE Office must approve all presentations.
- Mitigation: The Duke CE Office will provide mitigation steps for the Course Admin to relay to the presenters. This can include mandatory edits to the presentation material, required peer review, or even asking the presenter to remove themselves from the program altogether.
- If Duke CE&PD does not have all requirements on file during the specified timeframes above, Duke CE&PD has the right to withdraw credit and/or cancel the event. If you have any questions, please contact CE&PD.

ANCC Course File Maintenance & Application Expectations

- Courses approved for credit by the JA team are to be kept in the ANCC Credited Courses
  - GYANCC Credited Courses
- Course Files & Course Codes are only created by the JA team after a course has been approved for credit
- Repeating sessions for credited courses are requested using the CNE SmartSheet Form for EdTrack Requests
- Do not add or delete Course Files to this if you are not part of the JA team without first contacting the JA team

Folders are expected to be maintained by the CNE who applied for credit or who has been delegated to/ transferred to in the case of resignations.

Each file must have the following to meet ACCME Standards
- Pre-Assessment/Needs Assessment
- Advertisements/flyers - must match the credit approved - Advertising Requirements for CE Activities
- Budgets - reconciled within 14 days of course (if the course was not a zero-budget course)
- Agendas
- Correct Course ID
- Roster/Attendance for each offering - documented within 14 days of offering
- Eval for each offering addressing concerns
- Updated/New disclosures for new presenters/planning members or those that have new relationships to disclose
  - Include new presenters and committee/planning members
  - As the planner, you are responsible for ensuring the person has a disclosure on file by viewing the Disclosure Dashboard. If they do not have a disclosure on file, you are responsible for ensuring they complete a Disclosure Form
  - Once you have verified they have a disclosure, use the CEO for Filed COI Form to notify our team to place the disclosure in the course file

Applications:
- Submit completed applications 8 weeks prior to first offering to assure enough time to process & approve your application for credit (with all disclosures, documents & components)
  - Contact our team at CEPO-JA@duke.edu if submitting an application less than 8 weeks prior to the first offering.
- Application directions are imbedded in the application online.
- Multiple resources are available on our site in the Help Center Course Admin Resources including Application Requirements.
1. Activity Schedule – You must include the name of your CE activity, presentation times, speakers, Q&A, etc.

2. Joint Accreditation Statement & Logos

If your CE activity has been planned, implemented and evaluated by one (1) jointly accredited organization, please place the following statement on your promotional items:

In support of improving patient care, the Duke University Health System Department of Clinical Education and Professional Development is accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME), to provide continuing education for the health care team.

If your CE activity has been planned, implemented and evaluated by two (2) jointly accredited organizations, please place the following statement on your promotional items:

This activity has been planned and implemented by the Duke University Health System Department of Clinical Education and Professional Development and ________ for the advancement of patient care. The Duke University Health System Department of Clinical Education and Professional Development is accredited by the American Nurses Credentialing Center (ANCC), the Accreditation Council for Pharmacy Education (ACPE), and the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing education for the health care team.

The applicable joint accreditation statement must appear on all educational materials and brochures
The applicable joint accreditation statement must stand alone from any other statement
The Joint Accreditation logos must be placed on all promotional materials, and must not be altered in any way
Syllabus Requirements continued

Education Credit Statement(s) – Choose the statement(s) below pertaining to the target audience:

- **Physician Credit:** Duke University Health System Department of Clinical Education and Professional Development designates this activity for a maximum of ___ AMA PRA Category 1 Credit(s)™. Physicians should claim only credit commensurate with the extent of their participation in the activity.

- **Nurse Credit:** Duke University Health System Department of Clinical Education and Professional Development designates this activity for up to ____ credit hours for nurses. Nurses should claim only credit commensurate with the extent of their participation in this activity.

- **Pharmacy Credit:** Duke University Health System Department of Clinical Education and Professional Development designates this activity for ____ ACPE credit hours. Activity Numbers: JA0000655-xxxx-xx-xxx-x

Commercial Support (if applicable)

- If commercial support is received, the name of the ineligible company (or companies) and the nature of the support must be disclosed on the promotional materials. However, an ineligible company cannot be listed on promotional materials until there is a fully executed grant letter of agreement signed by the company and Duke CEPD.

Learning Objectives – Please list what participants should have learned by the conclusion of this activity.
Faculty Listing
List full name, degree, and organizational affiliation for all faculty (planning committee members, speakers, etc).

Disclosures

- Duke Continuing Education has implemented a process to resolve any potential conflicts of interest for each continuing education activity in order to help ensure content objectivity, independence, fair balance, and the content that is aligned with the interest of the public.

- It is the policy of the Duke Continuing Education to require the disclosure of anyone who is in a position to control the content of an educational activity. All relevant financial relationships with any commercial interests must be disclosed to participants via slideshow and/or syllabus at the beginning of each activity. See examples below:
  - The following speakers and/or planning committee members have indicated they have no relevant financial relationship(s) or commercial bias related to this CE activity: Jane Doe, MD, Richard Doe, MD
  - The speakers and/or planning committee members listed below have indicated the following relevant financial relationships: John Doe, MD is a member of the speakers’ bureau of GlaxoSmithKline.

Instructions on How to Receive Credit

Complete the entire activity and evaluation form. After the activity, you will receive an email from Duke Continuing Education that will provide you with instructions for obtaining your credits and printing your certificate.
Questions?
Enduring Activity

What is an enduring activity? Content available for the learner to complete at a time & place of the learner’s choosing.

Enduring requirements:

• Video credit is based on timestamp
• Quiz (3-5 questions/hr of content)
• Title(s)-if you have more than one enduring you have applied for.
• Learning objectives
• Consent form
## Enduring Activity Application Checklist

*Refer to Course Admin Resources found in the Help Center on the [Duke CE Website](#) to find additional resources*

### Enduring Material
- Content is available for the learner to complete at a time & place of the learner's choosing.
- Activity is on demand without a specific time or location designated for participation.
- Content can be accessed at any point during the lifespan of the activity without a designated time for participation.
- Examples: online interactive educational modules, recorded presentations, etc.

### Enduring Content Requirements
- Must meet [Credit Eligibility Requirements](#).
- Citations/Resources as applicable.
- Purpose of enduring must be included in the enduring content for the learner.
- Clear instructions for learners on requirements for successful completion.
- Assessment/Evaluation of learning:
  - Quick questions throughout or at the end of the activity.
  - 3-5 questions per hour of content.
  - Multiple choice or true/false.
  - No short answer or fill in the blank.

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**CONSENT**

I, ________, hereby consent to being photographed, videotaped, and/or audio-recorded by Duke University, its employees or designees, and I hereby grant to Duke University the royalty-free, exclusive, perpetual right to use (and to license to others to use) my name, voice, image and likeness in any media whatsoever, for the following purpose or event:

Which may include (check all that apply):

- Videotape and/or audio record for classroom use
- Educational teleconference
- Non-commercial broadcast TV or radio broadcast
- Commercial broadcast TV or radio broadcast
- Broadcast, podcast or streamed on the internet

My signature certifies that I am 18 years of age or older, that I intend to be legally bound by this document, and that I have read, signed, sealed and delivered it voluntarily, without coercion and with knowledge of its nature and consequences thereof.

**Signature**

**Date**

**Witness**

**Print Name**
Enduring Activity (If it is not housed in Ethos)

Requirements if the activity is not housed in our system

• Video (for our approval)
• Access to video or website where video is available with instructions or passcode to view.
• Consent form
• Quarterly evaluations
• Quarterly rosters
Questions Anyone?

1. How long are learners allowed to claim credit?
   As long as the course is open and available to learners

2. Are associates able to enroll learners into live activities?
   No, associates are only able to enroll learners into Regularly Scheduled Series

3. What is a speaker does not want to share his video?
   Credit will not be provided for that portion of the session

4. Can live or enduring activities be extended?
   No, another application will need to be submitted

5. Can an activity still receive credit if the joint accreditation department does not receive all of their required documentation?
   No, credit is only provided if all standards of met for the approval requirements
Claiming credit

- For Live Activities learners have a 1 year to claim their credit.
- Enduring learners have up to 2 years to claim their credit.
- Pharmacy credit has to be claimed within 60 days or pharmacist/pharmacy technicians will not receive their credit.
Questions/Comments
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(Diagram: Tentative Topics Schedule)

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<td>Live.Enduring Activity Applications Ins and outs of RSS</td>
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<td>Maintenance of Certification</td>
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