



Duke Continuing Education

DUKE CONTINUING EDUCATION PLANNING MONTHLY SERIES 2024

Live and Enduring Activity Applications



Clinical Education & Professional Development
Duke University Health System



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.

Register OneLink Account (Non-Duke Learners)

1. Go to [Duke Continuing Education](https://ja.dh.duke.edu/) (<https://ja.dh.duke.edu/>)
2. Click **Log In** in the upper right-hand corner
3. Click OneLink help
4. Click **Register**
Verify Email:
5. Go to the **email account** you used to create your OneLink account
6. Open email from Duke OneLink & Click the link in the email to continue
7. Create *username, password, security question*
8. Confirm account & click **Register with this account**

Activate OneLink Account & CE Profile (All Learners)

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4. Click **My Account** in the upper right-hand corner
5. Click **Edit** & complete all 3 Tabs: *Account, Profile, & Mobile*
6. Enter your **date of birth**
6. Click **Save** at the bottom of the page
**If you do not have a BOARD NAME or DIPLOMATE NUMBER, please skip*

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Duke Continuing Education Credit Planning Monthly Series

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<https://duke.zoom.us/j/96479810179>

Meeting ID: 964 7981 0179

(Tentative) Topics Schedule	DATE
Hands on Learning Application and You're approved Now what?	06/17/2024
Live.Enduring Activity Applications	07/15/2024
Ins and outs of RSS	08/19/2024
Maintenance of Certification	09/16/2024

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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.

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Topics for Discussion

- Approval Expectations
- Live Activity
- Enduring Activity
- Requirements to maintain your approval



Mission Statement

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.



Duke CE Office Healthcare Education Accreditation



Interprofessional
Continuing Education
(IPCE)



Policies

Accreditation Statement	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
Attendance Records	Must record & verify participation for six years from the date of the activity
Activity Documentation	Must retain activity files of the planning & presentation during the current accreditation term or for the last 12 months, whichever is longer
Subject to Review	All activities will be subject to review by the ACCME accreditation process as verification of fulfillment of the ACCME accreditation requirements
Content Validity of Enduring Materials	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 & a termination date.
HIPAA	Materials for classes & reaccreditation must be HIPAA compliant



Approval Expectations

Maintaining Standards & Expectations

[ACCME Standards](#)

Content Validation and Review/Educational Materials

- Recommendations must be based on evidence
- HIPPA & copyright compliant

Safeguards against Commercial Bias

- Content, activities & materials must not be promoted by a commercial interest
- Financial relationships of the planning committee & presenters will be disclosed to learners prior to the activity
- Planning committee & presenters must complete a disclosure prior to the activity and ineligible relationships 'resolved' prior to the activity
- Vendor Policies –Duke and ACCME

Grants & Funding/Commercial Support



- Must be reviewed by this office

Promotional Support

- [Advertising Requirements for CE Activities](#)
- Promotional support must be shared with this office



Measurements of Effectiveness

- Participants must receive an evaluation



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 CEPD 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 & end times for each session. No credit awarded for breaks, lunches, 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 retrieve 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 Designation Letter.
- Grant Agreements:** Signed and Co-Signed by Duke CE. (You may not provide grant information on marketing materials/syllabus 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.
- Designation 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 recuse themselves from the program altogether.
- If Duke CEPD does not have all requirements on file during the specified timeframes above, Duke CEPD has the right to withdraw credit and/or cancel the event. If you have any questions, please contact [CEPD](#).

1 week after the Activity/ Program

- Attendance Roster:** In Excel format with 3 columns: First Name, Last Name, & Email of all CE activity participants.
- If the CE activity offers **Pharmacy Credit**, please include 2 columns for **NABP#** and **PIN#** on the roster.
- Finalized Budget:** listing all actual income and expenses.

ANCC Course File Maintenance & Application Expectations

- **Courses approved for credit** by the JA team are to be kept in the [ANCC Credited Courses](#)
 - G:\ANCC 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 it 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
- Evals 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 assuring 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 assuring they [complete a Disclosure Form](#)
 - Once you have verified they have a disclosure, use the [REQ 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 CEPD-JAC@dm.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](#).





Syllabus 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)*TM. 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 knowledge-based 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.



Syllabus Requirements continued

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 Checklist

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 Credit Application Requirements

- If this was a previous live activity with credit, a new application must be submitted (may be cloned)
- It is **highly recommended** you partner with an experienced planner/educator to plan enduring content and submit an enduring application
- Enduring activities must have at least 30 minutes of eligible content
- Each enduring activity requires an individual application
 - Exceptions for activities that are bundled together and required to be completed as a package
- Title(s) of the Module
- In the Description section of the application, include the following information:
 - Format of the content being provided for upload into the LMS (jpeg, mp4, articulate, powerpoint, etc)
 - Which LMS system is the module planning to be loaded into (Duke LMS, Ethos/Duke CE site, specify which if any other)
 - Indicate if the content is specifically targeting a particular audience (is the content specific to a facility, site or specific to health care roles -also select this in the target audience section)
 - Need for additional contracts or assistance
- Upload the following documents in the budget section of the application
 - Content outline with time stamps
 - Particularly sections that are eligible for credit
 - Any/all contracts involved in developing/producing the content
 - Any/all grants related to the project
 - Any/all consents obtained
 - Critical if patients were involved in filming
- Content review dates
- Date content is intended to go live to learners

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
 - Quiz/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



Office of Marketing & Communications
3100 Tower Blvd.
Suite 1008
Durham, NC 27707
(919) 684-4148

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 the nature and consequences thereof.

Signature _____ Date _____

print name _____

Witness _____ Date _____



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.



Duke Credit Types

Credit	Inc	Min	Max	Var	Learner Type
Attendance	0	0	0	0	Fallback -includes all healthcare students
JA Credit –AH	0.25	0.25	1	1	Physician Assistant Psychologist Consumer Anesthesia Assistant Audiologist Echo Technologists Nurse & Nurse Practitioner Respiratory Therapists Psychiatrist Physical, Occupational & Speech Therapist Sonographer Speech Pathologist Ultrasound Technologists
AMA PRA Category 1Credit(s) [™]	0.25	0	1	1	Physician, Psychiatrist, Residents, Fellows
Child of JA Credit AH	0.25	0	1	1	NP, PA
(Board field) MOC	0.25	0	1	1	Board fields: ABIM, ABA, ABPath, ABOHNS, ABP, & ABS
MOC Part 2	0.25	0	1	1	Physician
MOC Part 4	0.25	0	20	1	Physician
ACPE - Pharmacist or Pharmacy Technician	0.25	0	1	1	Pharmacist or Pharmacy Technician
ANCC	0.25	0	1	1	CRNA Nurse Nurse Practitioner Social Workers Physical Therapist Occupational Therapist
IACET CEU Allied Health Professional	0	0	1	0	Anesthesia Technician Autotransfusionist Audiologist Cancer diagnostics & treatment specialists Clinical psychologist Community Health Workers Dance/Movement Therapist Dental Personnel Dietitian/nutritionist Diagnostic Medical Personnel Dietitian / Nutritionist Electrocardiogram technician Emergency Medical Personnel Environmental health officer Environmental Health Tech Esthetician Exercise science professionals Health care administrator Health educators/counselors Health information technician Horticultural therapist Imaging specialists Licensed Practical Nurse Massage therapist Medical assistant Medical coder Neurophysiologist Medical transcriptionist Nursing Assistants Nuclear medicine Tech Occupational therapist Orthotist / Prosthetist Orthoptist Pedorthist Perfusionist Pharmacy personnel Phlebotomist Physical Therapist Physician Assistants Recreational therapist Renal dialysis technologist Respiratory therapist Social Work Speech – Language Path Surgical Technologist Etc. https://www.asahp.org/about-asahp

*Learners are responsible for assuring credits meet regulatory requirements for their licensing and accreditation needs.

Updated: 8.23.2023



Questions/Comments



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