

DUKE CONTINUING EDUCATION PLANNING MONTHLY SERIES 2024

Ins and Outs of Regularly Schedule Series & Running Reports









Attendance

Text SAVNES 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 <u>Duke Continuing Education</u> (https://ja.dh.duke.edu/)
- 2. Click **Log In** in the upper right-hand corner
- 3. Click OneLink help
- 4. Click **Register** Verify Email:
- Go to the **email account** you used to create your
 OneLink account
- Open email from Duke <u>OneLink</u> & 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)

- Go to <u>Duke Continuing Education</u> (https://ja.dh.duke.edu/)
- 2. Click Log In in the upper right-hand corner
- Click Log In with OneLink & use the username & password you created
- 4. Click My Account in the upper right-hand corner
- 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

Enter/Confirm Mobile Number

- 1. Go to Duke Continuing Education (https://ja.dh.duke.edu/)
- 2. Click My Account
- 3. Click Edit
- 4. Click Mobile tab
- 5. Enter/verify your mobile number in the box under Phone Number. Do not include spaces or special characters
- Click Confirm Number
- 7. You will receive a 4-digit confirmation code via text. Enter that code in the box under Confirmation Code
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Duke Continuing Education Credit Planning Monthly Series

This monthly RSS occurs the **3rd** Monday every month from **12pm-1pm.** It will provide education planners knowledge & skills to coordinate high-quality credited education offerings.

The series will include accreditation requirements as well as topics & techniques to maximize education offerings.

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

Meeting ID: 964 7981 0179

(Tentative) Topics Schedule	DATE		
Hands on Learning Application and	06/17/2024		
You're approved Now what?			
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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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.



ACCME Standards

1 **Ensure Content is Valid** Prevent Commercial Bias & Marketing in Accredited Continuing Education Identify, Mitigate, & Disclose Relevant Financial Relationships 4 Manage Commercial Support Appropriately Manage Ancillary Activities Offered in Conjunction with

Join future Duke Continuing
Education Credit Planning
Monthly Series to learn more
about the ACCME Standards







Accredited Continuing Education

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					





OBJECTIVES

- Defining an RSS
- Discuss approval expectations
- Discuss disclosures requirements
- Describe educational grant information
- Demonstrate running course and group reports
- Discuss Marketing material requirements
- Explain requirements to maintain your approval
- Discuss MOC RSS requirements



Regular Scheduled Series & Grand Rounds

What is an RSS?

- Regularly Scheduled Series/Grand Rounds
- Series of multiple, ongoing sessions, primarily planned by & presented to the organization's professional staff
- Topics vary each offering



Regularly Scheduled Series (RSS)

Regularly Scheduled Series (RSS) & Grand Rounds Checklist

Please refer to the <u>Course Admin Resources</u> listed under the Help Center on the <u>Duke CEPD Website</u> to find instructional materials and other required documents.

rior to Submitting the Application

Applications:

- RSS/Grand Rounds are approved for by the calendar year (January thru December).
- Submit all RSS & Grand Rounds Applications for upcoming calendar year by November 1 every year.
- Include finalized dates & times for all sessions for at least the first 6 months of the year. You may include the
 entire year's dates and times if they are known.

Disclosures:

- All planning members & presenters must Complete the <u>Duke Continuing Education Disclosure</u> form.
- Applications will not be approved until disclosures are complete.
- View completed disclosures on the <u>CE Disclosure Dashboard.</u>
- We understand speakers for RSS's often change or are decided the week of the session. Once a speaker is selected, they need to complete a disclosure form and the CE office must be notified if there is any financial relationships prior to the presentation.
- Grant Funding: If your event involves grant funding, please submit all grants (without redaction) as soon as possible

8 Weeks before the First Session

- ☐ <u>Marketing Materials</u>: including brochures, "save-the-date" flyers, and website announcements. Marketing must be approved and contain the correct accreditation statement(s), logo(s), and Credit Amount.
- ☐ <u>Grant Agreements:</u> Signed and Co-Signed by Duke CE. (You may not provide grant information on marketing materials/syllabus unless the Duke CE Office has a fully executed the grant agreement).

Before each individual Session

- ☐ Email speaker updates and topics to: Duke Continuing Education Department CEPD-JAC@dm.duke.edu.
- ☐ <u>Mitigation:</u> The Duke CE Office will provide mitigation steps for the Course Admin to relay to the presenters.
- ☐ Please make sure that learners know the Duke Continuing Education website address of https://ja.dh.duke.edu/ to be able to log in to their account.
 - Duke users can login with their Net ID & password. Non-Duke Attendees must Register A Duke OneLink Account & Activate Duke CE Profile.
- ☐ <u>Attendance</u>: If learners request credit, their attendance documentation is required. Please ensure that learners know the **Duke CE text phone number (919) 213-8033** and **RSS Text Code** for each session.

Requirements must be maintained at all times to prevent credit being revoked.





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Cloning an application

You can Clone your last year's application if you just need to make minor changes (dates, etc.)

Go to

<u>https://ja.dh.duke.edu/</u> My Account / My Activities / Activity Applications / under list of titles / far right, view / (the Clone tab will be to the far right after you click on view)





Disclosures

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- Applications will not be approved until disclosures are complete.
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- We understand speakers for RSS's often change; once a speaker is selected, they need to complete a disclosure form and the CE office must be notified if there is any financial relationship(s) prior to the presentation.



Duke CE Disclosure Form

Hello

We look forward to the opportunity to work with you as a valued colleague in providing accredited continuing education (CE) through the Duke University Health System.

Why am I receiving this communication?

The Duke Continuing Education Department is Jointly Accredited by ACCME, ANCC, ACPE, & IACET. We appreciate your help in partnering with us to follow accreditation guidelines and help us create high-quality education that is independent of industry influence. In order to participate as a person who will be able to control the educational content of this accredited CE activity, we ask that you disclose all financial relationships with any ineligible companies that you have had over the past 24 months. We define ineligible companies at those whose primary business is producing, marketing, selling, or distributing healthcare products used by or on patients. There is no minimum financial threshold; you must disclose all financial relationships, regardless of the amount, with ineligible companies. We ask you to disclose regardless of whether you view the financial relationships are elevant to the education. For more information on the Standards for Integrity and Independence in Accredited Continuing Education, please visit acome orgistandards.

Why do we collect this information?

Since healthcare professionals serve as the trusted authorities when advising patients, they must protect their learning environment from industry influence to ensure they remain true to their etritical commitments. Many healthcare professionals have financial relationships with ineligible companies. By identifying and mitigating relevant financial relationships, we work together to create a protected space to learn, teach, and engage in scientific discourse free from influence from organizations that may have an incentive to insert commercial bias into education.

What are the next steps in this process

After we receive your disclosure information, we will review it to determine whether your financial relationships are relevant to the education. Please note: the identification of relevant financial relationships does not necessarily mean that you are unable to participate in the planning and implementation of this educational activity. Rather, the accreditation standards require that relevant financial relationships are mitigated before you assume your role in this activity.

To help us meet these expectations, please use the form we have provided to share all financial relationships you have had with ineligible companies during the past 24 months. This information is necessary in order for us to be able to move to the next steps in planning this confinuing education activity.

If you have questions about these expectations, please contact us at CEPD-JAC@dm.duke.ed





First Name:	Patricia
Last Name:	Bailey
Email Address:	patricia.bailey@duke.edu
Credentials:	Other (Type Your Own)
Prospective Roles:	Speaker
In the past 24 months, I have had financial relationships with ineligible companies:	No





Grants

- If your event involves educational grant funding, please submit a copy (without redaction) to our office as soon as possible.
- Educational Grant Agreements: Signed and Co-Signed by Duke CE.
- You may not provide educational grant information on marketing materials / syllabus unless the Duke CE Office has a fully executed copy of the agreement.



Marketing materials

- Send to CE Office for approval before distributing
- Examples: Brochures, "savethe-date" flyers, website announcements
- Marketing must be approved and contain the correct accreditation statement(s), logo(s), and Credit Amount

Advertising Requirements for Continuing Education (CE) Activities

Please create CE activity promotional materials that include all of the advertising requirements listed below.

- 1. Activity Title You must include the name of your CE activity or event on your promotional materials
- 2. Joint Accreditation Statement & Logos
 - If your CE activity has been planned, implemented and evaluated by <u>one (1) jointly accredited organization</u>, 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 <u>must appear on all educational materials and brochures</u>
- The applicable joint accreditation statement <u>must stand alone from any other statement</u>
- The Joint Accreditation logo must be placed on all promo-materials, must be a circle, & can't be altered in any way





If your CE activity offers IACET credit, please place the following statement and logo on your promotional items:

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 ______ CEUs for this program.







3. 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.
- <u>Pharmacy Credit:</u> 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-xx-xx

4. 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, the disclosure must not include the ineligible companies' corporate or product logos, trade names, or product group messages. 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.







Once application is approved, associate will receive approval letter along with designation letter

Thank you for submitting your Continuing Education (CE) activity application; it has been approved and your designation letter is included. Any necessary mitigation forms are included for your records. The following information is being sent for your review; active links are included for reference.

*Before each session make sure speakers have updated disclosures on file (check the <u>CE Disclosure Dashboard</u>)-without current disclosures, no credit will be awarded- and <u>email speaker and title information</u> to: Duke Continuing Education Department - <u>CEPD-JAC@dm.duke.edu</u>

Please make sure that learners know the Duke Continuing Education website address https://ja.dh.duke.edu/ to be able to log in to their account and receive credit.

Duke users can login with their Net ID and password. Non-Duke Attendees must Register A Duke OneLink Account & Activate Duke CE Profile (Instructions are also attached)

Learners need to know the Duke CE text phone number (919) 213-8033 and corresponding SMS Text Code for each session. Codes are good for 24 hours.

Below is a list of your sessions' codes:

If you have any questions, please contact our office.

Thank you,

Duke Continuing Education

CEPD-JAC@dm.duke.edu

Joint Accreditation resources and application: https://ja.dh.duke.edu/







Designation letter





On behalf of Duke University Health System Clinical Education and Professional Development, we are pleased to inform you that the following activity has been reviewed and designated as a **jointly accredited** activity.

Title: Format: Activity Dates: Total Credits: Credit Type:

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The purpose of this letter is to also draw your attention to the following:

Content Validation and Review

Recommendations involving clinical medicine must be based on evidence that is accepted within the healthcare profession as adequate justification for their indications and contraindications in the care of patients. Scientific research referred to, reported, or used in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection and analysis.

Safeguards against Commercial Bias

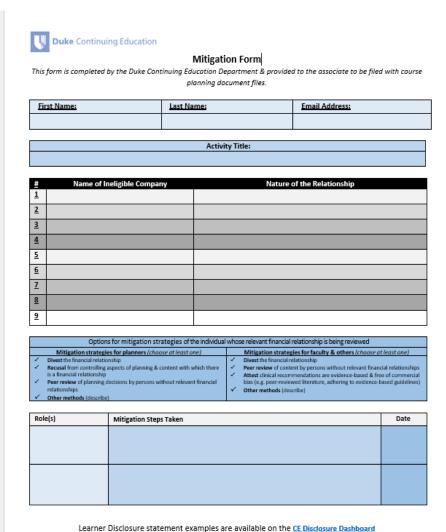
The content or format of activities and related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest. All financial relationships of individuals involved with the development and implementation of the activity content will be disclosed to learners prior to the activity. When preparing your material, the Activity Director and Co-Director(s) should ensure adherence to the following guidelines for all presenters, moderators, and authors:

- · Avoid all bias towards a product, procedure, device or therapy.
- All applicable products, devices or therapies should be addressed in your presentation to ensure fair and
 equal balance.
- Classes of drugs and devices should be used rather than individual agents whenever possible.



Before Each Session

- Email speaker updates and topics to: Duke Continuing Education Department CEPD-JAC@dm.duke.edu
- Check that disclosures are current on the <u>CE Disclosure</u>
 <u>Dashboard</u> without current disclosures, no credit will be awarded
- If Mitigation is needed, the Duke CE Office will provide steps to the associate to relay to the presenters
- Any other changes (adding speakers, changing dates, etc.)
 should also be sent to us



More information

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 - SMS Text Codes are good for 24 hours





Maintaining MOC for Regularly Scheduled Series

- If your course includes MOC, have your learners make sure their CE Ethos profiles are complete and updated to include their diplomate and birthdates
- Without this information, MOC credits will not transfer over to their boards correctly
- RSS/Grand Rounds: One Peer Review Form (for each specialty) may be submitted for the entire RSS/Grand Rounds (including all dates for the series)
- 1)Onsite Moderators Report, 2)MOC Documentation Form and 3)Attendance Roster: must be completed
 & submitted for each weekly session within 30 days



MOC Activity

MOC (Maintenance of Certification): MOC Points: are equal to CME points

*Please refer to the Course Admin Resources found under the Help Center on the <u>Duke CE Website</u> to find instructional materials and other required documents.

MOC Documentation requirements

Peer Review Document:

- Must send & receive this completed document prior to approving the application & providing Designation Letter.
- Must be completed by a physician certified in that specialty that is NOT part of the planning committee and is NOT associated with the course.
- RSS/Grand Rounds: One Peer Review Form (for each specialty) may be submitted for the entire RSS/Grand Rounds Series (including all dates for the series).

Onsite Moderators Report: must be returned within 30 days of course completion

- Must be completed during the actual event/course by someone, i.e. course associate or physician attending the course. The moderator may be a member of the course planning committee. This document should reflect feedback suggestions the physician offered or will offer to attendees as follow-up communication & must be in response to the attendee participation threshold (active engagement, test scores, reflective statements, simulations, case studies, etc.).
- RSS/Grand Rounds: must be completed & submitted for each weekly session within 30 days.

MOC Documentation Form: This must be returned within 30 days of course completion

- Document must be completed by a physician in attendance (may be member of planning team) to attest to lessons learned & learner's actions to implement in practice.
- RSS/Grand Rounds: must be completed & submitted for each weekly session within 30 day

MOC programs supported by ACCME

We only process programs supported by ACCME:

- ABIM- Internal Med
- ABA- Anesthesiology
- ABOHNS- Otolaryngology-Head and Neck Surgery
- ABPath-Pathology
- ABP Pediatrics
- ABS-Surgery

Additional Requirements

Communication to participants

- Remind participants -When they register for the course, they need to check the Profile Section of their Ethos Account to ensure their Birthdate and Diplomat # are correct in order to receive MOC credit.
- Ensure that MOC participants are made aware of the minimum participation threshold: i.e, passing score, correct written or shared responses, etc.

Attendance Roste

A spreadsheet with all attendees requesting MOC credits must be submitted within 30 days after each session & must contain columns for:

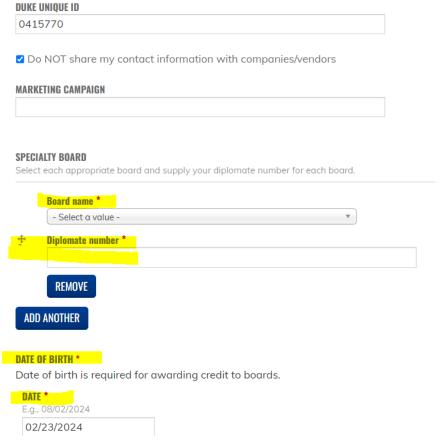
- Name
- Birthdate
- Diplomate #



MOC profile example

PROFILE FOR PATRICIA BAILEY





Remember to **SAVE** any changes made!







What does the course/group report include?

- Course Name
- User ID
- Username
- E-mail
- First Name, Last Name of Attendee
- Status of completion (Post-Activity Evaluation, Quiz, or Complete)
- Date started
- Date Completed
- Credits
- Credit Type

	A	В	C	D	E	F	G	Н		J	K	l	M	N
1	Node ID	Course	SKU	User ID	Username	E-mail	First nam	Last name	Status	Date Start	Date Com	Credits	Credit typ	e
2	188968	Live and E	induring Ad	234473	415770	patricia.ba	Patricia	Bailey	Complete	07/15/20	07/15/20	1	JA Credit -	AH
3														
4														



Post Activity Evaluation - Report

These reports are given based on request for Live and **Enduring Courses Only.**

- Summary of Post Evaluation results
- Statistics of evaluations (using pie chart and graphs in analysis of evaluations)



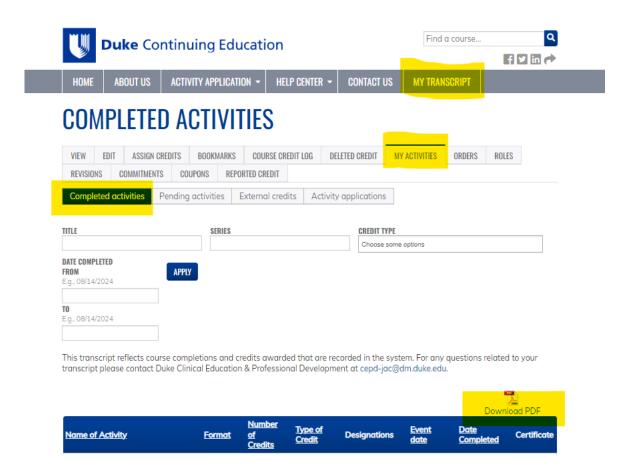






Individual Transcripts

Name of activity
Format
Number of credits
Type of Credit
Designations
Event Date
Date completed
Downloadable Certificate









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Questions/Comments





