



Duke Continuing Education

# DUKE CONTINUING EDUCATION PLANNING MONTHLY SERIES 2024

## Ins and Outs of Regularly Schedule Series & Running Reports



Clinical Education & Professional Development  
Duke University Health System



# 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 [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)

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 **Log In with OneLink** & use the username & password you created
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*

### Enter/Confirm Mobile Number

1. Go to [Duke Continuing Education](https://ja.dh.duke.edu/) (<https://ja.dh.duke.edu/>)
2. Click **My Account**
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4. Click **Mobile** tab
5. Enter/verify your mobile number in the box under **Phone Number**. Do not include spaces or special characters
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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 You're approved Now what?	06/17/2024
Live.Enduring Activity Applications	07/15/2024
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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
- 2 Prevent Commercial Bias & Marketing in Accredited Continuing Education
- 3 Identify, Mitigate, & Disclose Relevant Financial Relationships
- 4 Manage Commercial Support Appropriately
- 5 Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education

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



# 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
- Approval Expectations
- Disclosures
- Grant information
- Running Reports
- Marketing material
- Requirements to maintain your approval
- MOC RSS requirements
- Course reports/Group reports



# 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) & Grand Rounds 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

#### 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 [Duke Continuing Education Disclosure](#) form.
  - Applications will not be approved until disclosures are complete.
  - View completed disclosures on the [CE Disclosure Dashboard](#).
  - 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

**Marketing Materials:** 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.

**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 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](mailto:CEPD-JAC@dm.duke.edu).

**Mitigation:** 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](#).

**Attendance:** 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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 **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 as those whose primary business is producing, marketing, selling, re-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 as relevant to the education. For more information on the Standards for Integrity and Independence in Accredited Continuing Education, please visit [accme.org/standards](http://accme.org/standards).

**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 ethical 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 continuing education activity.

If you have questions about these expectations, please contact us at [CEPD-JAC@dm.duke.edu](mailto:CEPD-JAC@dm.duke.edu)

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, “save-the-date” flyers, website announcements
- Marketing must be approved and contain the correct accreditation statement(s), logo(s), and Credit Amount

## Duke Continuing Education Credit Planning Monthly Series 2024

This monthly RSS will provide education planners knowledge & skills needed to coordinate high-quality credited education offerings. This series will include accreditation topics, requirements and technique to maximize education offerings.


Scheduled the **3rd Monday every month 12pm-1pm.**  
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**Duke Continuing Education**

Duke University Health System Department of Clinical Education & Professional Development is a Jointly Accredited provider of continuing education.

### Obtaining Credit:

Learners **MUST** have an active OneLink Account **BEFORE** the activity to attend and claim education credits.

#### Register OneLink Account (Non-Duke Learners)

1. Go to [Duke Continuing Education \(http://duke.edu/ce\)](http://duke.edu/ce)
2. Click Log In in the upper right-hand corner
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6. Go to the email account you used to create your OneLink account
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5. Click Edit & complete all 3 Tabs: Account, Profile, & Mobile & Enter your date of birth
6. Click Save at the bottom of the page

\*If you do not have a OneLink Account or ID PROFILE NUMBER, please stop




# Before Each Session

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



# Maintaining MOC for Regularly Scheduled Series

- If your course includes MOC, please 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)
- Onsite Moderators Report: must be completed & submitted for each weekly session within 30 days
- MOC Documentation Form: 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 [Duke CE Website](#) 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 days.**

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

- Name
- Birthdate
- Diplomat #



# MOC profile example

## PROFILE FOR PATRICIA BAILEY

VIEW	<b>EDIT</b>	ASSIGN CREDITS	BOOKMARKS	COURSE CREDIT LOG	DELETED CREDIT	MY
REVISIONS	COMMITMENTS	COUPONS	REPORTED CREDIT			
Account	<b>Profile</b>	Mobile				

### DUKE UNIQUE ID

0415770

Do NOT share my contact information with companies/vendors

### MARKETING CAMPAIGN

### SPECIALTY BOARD

Select each appropriate board and supply your diplomate number for each board.

#### Board name \*

- Select a value -

#### + Diplomat number \*

REMOVE

ADD ANOTHER

### DATE OF BIRTH \*

Date of birth is required for awarding credit to boards.

#### DATE \*

E.g., 08/02/2024

02/23/2024

**Remember to  
SAVE any  
changes made!**

**SAVE**



# 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	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Node ID	Course	SKU	User ID	Username	E-mail	First name	Last name	Status	Date Start	Date Com	Credits	Credit type	
2	188968	Live and Enduring Ac		234473	415770	patricia.b	Patricia	Bailey	Complete	07/15/20	07/15/20	1	JA Credit - AH	
3														
4														



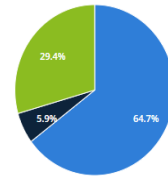


# Post Activity Evaluation - Report

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)

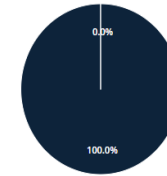
Will you attempt to address these barriers in order to implement changes in your competence, performance, and/or patients' outcomes?



Result details

N/A	11
No	1
Yes, Please explain..	5 (view)

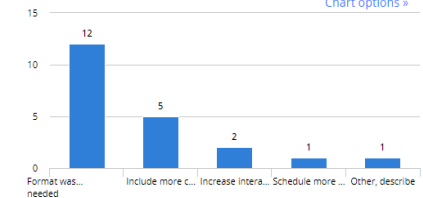
How will you integrate interprofessional teamwork behaviors and functions in the care of your patients?



Result details

Left Blank	0
User entered value	17
Average submission length in words (ex blanks)	5.29
continue to study and learn new medications	
I have a better understanding of cancer basics.	

How might the format of this activity be improved for the content presented (select all that apply)?



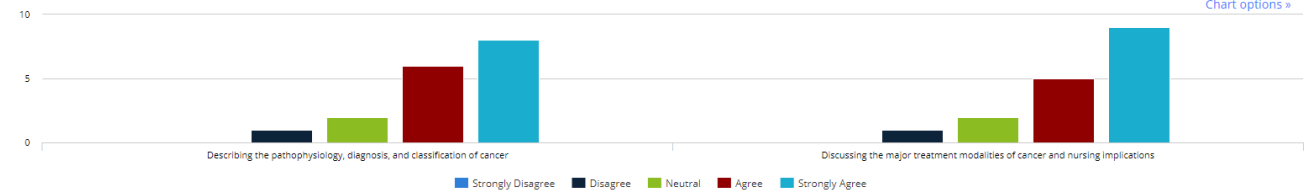
Result details

Format was appropriate; no changes needed	12
Include more case-based presentations	5
Increase interactivity with attendees	2
Schedule more time for Q and A	1
Other, describe	1 (view)

Post Activity Evaluation: Webform results

This page shows analysis of submitted data, such as the number of submissions per component value, calculations, and averages. Additional components may be added under the "Add analysis components" fieldset.

Please rate the impact of the following objectives:



# Individual Transcripts

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

**Duke Continuing Education**

Find a course...

HOME ABOUT US ACTIVITY APPLICATION ▾ HELP CENTER ▾ CONTACT US **MY TRANSCRIPT**

## COMPLETED ACTIVITIES

VIEW EDIT ASSIGN CREDITS BOOKMARKS COURSE CREDIT LOG DELETED CREDIT **MY ACTIVITIES** ORDERS ROLES

REVISIONS COMMITMENTS COUPONS REPORTED CREDIT

**Completed activities** Pending activities External credits Activity applications

TITLE  SERIES  CREDIT TYPE

DATE COMPLETED FROM  **APPLY**

TO

This transcript reflects course completions and credits awarded that are recorded in the system. For any questions related to your transcript please contact Duke Clinical Education & Professional Development at [cepd-jac@dm.duke.edu](mailto:cepd-jac@dm.duke.edu).

**Download PDF**

Name of Activity	Format	Number of Credits	Type of Credit	Designations	Event date	Date Completed	Certificate
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# Questions/Comments

