



Pennsylvania State Nurses Association

Individual Activity Application Manual

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Office of Professional Development

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Pennsylvania State Nurses Association Approver Unit is accredited as an approver of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation.

2015 ANCC Criteria

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Nursing Professional Development

The lifelong process of active participation by nurses in learning activities that assist in developing and maintaining their continuing competence, enhancing their professional practice, and supporting achievement of their career goals.

(Nursing Professional Development: Scope and Standards of Practice, ANA, 2010)

OVERVIEW

The three components of nursing professional development as they relate to nursing continuing professional development (NCPD) are:

1. **Structural Capacity:** The commitment, accountability, leadership, and resources of an organization required to support the delivery of quality nursing continuing professional development (NCPD).
2. **Educational Design Process:** The development, delivery, and evaluation of NCPD activities.
3. **Quality Outcomes:** The impact of structure and process on an organization and the value/benefit to nursing professional development.

Accreditation

Accreditation of PSNA's NCPD Approver Unit is secured through the American Nurses Credentialing Center's Commission on Accreditation (hereinafter ANCC COA).

ANCC

The accreditation program is administered at the national level by the ANCC. The accreditation program is governed by the ANCC COA whose members have expertise in NCPD, adult education, research, standard setting, and professional development. The ANCC accreditation system represents a voluntary recognition process through which an institution, organization, or agency engages in a comprehensive analysis and review of its goals and processes for NCPD, and its capacity to achieve those goals and adhere to those processes over an extended period of time. ANCC is committed to excellence and high quality in NCPD.

Accreditation attests to an organization's ability to meet the established criteria for conducting a total NCPD program. Accreditation of state nurses' associations, national specialty nursing organizations, and federal nursing services also allows accredited organizations to approve the planned NCPD activities of applying providers or constituents. Accreditation is granted for a maximum of four years.

The ANCC's core values are (2015 ANCC Primary Accreditation Approver Application Manual):

1. Maintain the integrity of the process through a consistent, fair, and honest application of the accreditation program criteria
2. Promote and maintain competence in relation to standards, criteria, and components of lifelong learning
3. Foster an effective and thorough quality peer-review process for applicant organizations
4. Mentor organizations responsible for providing or approving NCPD to ensure the delivery of high-quality educational activities
5. Maintain a high level of accountability and responsiveness to the community of interest in the accreditation process
6. Value and encourage innovation in the accreditation process and delivery of NCPD
7. Focus on providing quality in the accreditation process and in the provision of NCPD
8. Recognize and value diversity in the community of interest
9. Promote interprofessional activities by entities that hold accreditations for more than one health related profession, and where nursing is a major participant

PSNA Approver Unit

The Pennsylvania State Nurses Association (PSNA) is a state nurses' association and constituent member of the American Nurses Association (ANA). A component of PSNA's Office of Professional Development is an Accredited Approver Unit, which is administratively and operationally responsible for coordinating all aspects of the approval process. The Approver Unit consists of the Accredited Approver Program Director (AAPD), the Nurse Peer Reviewers (NPRs) and the Professional Development Assistant. PSNA's Accredited Approver Program Director is administratively responsible for the Approver Unit.

PSNA Approver Unit Goals

1. Support standards that will assist individuals, institutions, and organizations to assess, plan, implement, and evaluate quality NCPD activities
2. Conduct a peer-review program for the approval and recognition of NCPD activities
3. Monitor the quality and consistency of the Accredited Approver Unit of PSNA

PSNA Approver Unit Responsibilities

1. Adhere to and support the standards of NCPD set forth by ANCC
2. Maintain a process of peer-review approval of NCPD activities

3. Maintain a system that provides information and/or facilitates nurses' acquisition of knowledge to maintain and improve professional competence
4. Through the education process, assist nurses to deliver quality nursing care to people throughout the continuum of life
5. Facilitate the professional growth and development of nursing and the discipline of nursing via a sound education process

Nurse Planner Expectations

Nurse Planner – The Nurse Planner (NP) is a Registered Nurse with a current/unrestricted nursing license, and a Bachelor's or higher degree in nursing.

Responsibilities of the NP include:

1. Lead the process for the planning, provision and evaluation of continuing nursing education and ensuring that ANCC/PSNA criteria are being met.
2. Assess professional practice gaps, identify needs that can be addressed through education, create a planning committee, develop program(s) based on best available evidence, provide the planned program, and then evaluate whether or not learners achieved the desired outcome.
3. Identify, mitigate and disclose any relevant financial relationships for anyone in a position to control the program content, i.e.: presenters/authors and planners.
4. Maintain the content integrity of the planned program.
5. Ensure that content actively engages the learner in an appropriate manner
6. Create short-term outcomes related to the planned program(s) that measure for changes in knowledge, skill, and/or practice at the end of the program. Long term evaluations can also be used when appropriate.
7. Evaluate and use summative evaluation data to guide any future delivery of the activity.
8. Ensure that all required documentation is completed and maintained for 6 years following the date of the program.
9. Communicate with the Accredited Approver Program Director at PSNA regarding any changes in the program's speaker, content or responsible party. (via email to: apply@psna.org)

APPLICATION PROCESS

Review all sections of this manual to develop a complete NCPD application. The application process will enhance the quality of NCPD. Contact hours may not be awarded prior to receiving written notification of activity approval.

Failure by the applicant to meet any of the specified deadlines will result in withdrawal of the application.

All fees are considered non-refundable.

Step 1: The Eligibility Verification Form

1. Submit the form “Applicant eligibility verification” via email to apply@psna.org
2. The NRPL will review and verify eligibility
3. The PD Assistant will reach out with approval of eligibility

Application Process

1. Download the Individual Activity Application at www.psna.org.
2. Refer to the resources online at www.psna.org for Individual Activity Applicants
3. Reach out to schedule a consult with the AAPD prior to submitting your applications if you have any questions. Email apply@psna.org with the subject line: Request a Pre-Application Consult with the AAPD as the title
4. Attend any informational zoom meetings for IAAs prior to submitting your application
5. Request a copy of the most current IAA Application by emailing apply@psna.org with the subject title: Requesting the IAA Application
6. Submit completed application (**ONE PDF including all attachments WITHIN the PDF**) and any additional forms directly to apply@psna.org and complete the online payment process for your activity. (See Fees/Payment section on psna.org.)
7. **Failure to follow the instructions can result in additional costs if the application needs to be completely resubmitted. Please ask all questions PRIOR to submitting the application using the apply@psna.org email.**

Quantitative Review

1. Upon receipt of an application, a quantitative review will be conducted by the PD assistant.
2. The applicant/nurse planner will receive an e-mail requesting missing documents.
 - In the case of an accelerated application request, a phone call will alert the applicant to the required remediation if an e-mail response is not received within two days.
3. The applicant will be required to submit requested documents via e-mail within **one week**.
Failure to submit documentation as requested can result in denial.
4. Review of the application will not begin until **all documents and payment** are received.

Retroactive Approval

1. Retroactive approval is approval for an activity’s contact hours after activity has been conducted is **NOT authorized by the ANCC COA or PSNA**.
2. NCPD activities for which contact hours are to be awarded **must** be approved by PSNA **prior** to presentation of the activity.

Revocation of Approval

PSNA reserves the right to revoke approval of a provider of NCPD activities for any of the following:

1. Failure to maintain compliance with policies and criteria relative to the category of approval originally secured
2. Provider of an educational activity awards contact hours prior to securing approval
3. Modification of NCPD activity content and/or process resulting in substantial changes to the nature of the activity without submission of a new application for approval
4. Investigation and verification by PSNA of written complaints or charges by consumers or others
5. Failure to comply with an investigation
6. Failure to comply with conditions required to maintain approval

The provider of the educational activity will be formally notified of the revocation of its approval in writing. Revocation will be effective on the date the letter of notification is received by the provider of the educational activity. Upon notification of revocation, all statements regarding approval status must be removed from written materials relating to the previously approved NCPD activity.

Organizational Changes

Providers of approved NCPD activities will notify PSNA of organizational changes that occur during any approval period within 30 days of the change. These include, but are not limited to:

1. Change in applicant's name
2. Change in the personnel, administrative contact, or nurse planner(s)
3. Change in organizational structure and/or ownership

Application Review

1. Results of the application review process will be communicated to the applicant via e-mail
2. The applicant will be required to submit any requested clarifications/remediations via e-mail within one week of notification
 - In the case of an accelerated application, requested clarifications will be due within three days of notification
3. The clarifications/remediations will be reviewed by the PD Assistant, the NPR and APPD for adherence to ANCC guidelines

Final Decision

1. Results of the application review process will be communicated to the applicant in a letter via e-mail
2. The approval letter will include the contact hours, dates of the approval term, reference number, and comments

Withdrawal of an Application

Applicants may withdraw an application at any time during the application process with the understanding that any application fee originally paid with the application is **non-refundable**

1. Applicants will notify PSNA in writing of the withdrawal of the application
2. An automatic withdrawal of the application will occur if there is a failure to submit quantitative review documents or if the required timeframe to submit the qualitative clarifications has been exceeded

For assistance, email PSNA at apply@psna.org or contact the PSNA PD Assistant at 717-798-8915. Please have the following reference information available prior to contacting PSNA:

1. Title of educational activity OR Applicant's Name + Application Reference Number
2. Name, address, and phone number of the provider of the educational activity, as well as the name of the contact person
3. Date(s) of the educational activity

Fee Schedule

The fee structure is based on the number of contact hours to be awarded. Fees may be paid by check, credit card (Mastercard, Visa, and American Express) or with an issued purchase order number.

Applications for approval of educational activities **must be received a minimum of eight (8) weeks (56 days) prior** to the first date the educational activity is to be conducted. Applications received between six and eight weeks prior to the date of the educational activity will be charged the accelerated fee. Educational Activity applications may be submitted via e-mail to apply@psna.org.

To calculate contact hours, add the number of organized learning/teaching minutes and divide by 60. For example, if the total number of organized learning/teaching minutes is 120, the number of contact hours to be awarded is 2.0 (120/60). Contact hours can be rounded (up or down) to the nearest 0.25. For example, 2.80 is rounded to 2.75, 2.90 is rounded to 3.0. Reach out via email at apply@psna.org with questions regarding the calculation of contact hours. **Retroactive awarding of contact hours is not permitted.**

Fees: (found online at <https://www.psna.org/iaa-payments/>)

An accelerated option is available for educational activities as listed above by approved request prior to application submission.

PSNA must first be contacted for approval to submit an accelerated application.

These applications must be submitted no less than six weeks prior to the event.

This option is not permitted for first-time applicants.

Submission Checklist

Complete the following requirements:

Action	Completed
Submit and obtain approval for “Applicant Eligibility Verification”	
Complete the Application for Individual Activities	
Include attachments ON ONE PDF form (certificate, disclosures, relevant financial relationship information (if applicable), commercial support forms (if applicable) and joint provider information (if applicable). *Planning tables are no longer required	
E-mail one complete application (on one PDF) to PSNA at apply@psna.org	
Submit non-refundable fee online at https://www.psna.org/iaa-payments/	

APPLICATION COMPONENTS

Demographic Data

Demographic information includes the applicant's and/or nurse planner's name and contact information, organization/individual/facility providing the activity, title of the event, date to be presented, activity type, and the number of contact hours requested.

EDUCATIONAL DESIGN PROCESS

CE involves learning activities intended to build upon the educational and experiential basis of the professional RN for the enhancement of practice, education, administration, research, or theory development, to the end of improving the health of the public and RNs' pursuit of their professional career goals.

ANCC Primary Accreditation Approver Application Manual, 2015

The Planning Process – How to PLAN your NCPD Activity:

1. Identify if education is the right intervention
2. Identify a problem in practice or opportunity for improvement (Professional Practice Gap)
3. Organize a planning committee
4. Analyze the practice gap. What are nurses doing or not doing that is leading to a problem?
5. Confirm that you have evidence of a problem or need for improvement for your target audience
6. Determine if the need is a lack of knowledge, a skill and/or a practice
7. Identify your target audience
8. Determine desired outcome(s)
9. Ensure that the content is based on best available evidence
10. Determine your learner engagement strategies (Power Point and Lecture cannot be used as the only learner engagement)
11. Identify, Mitigate, and Disclose all relevant financial relationships for all individuals in a position to control content. (Identify, mitigate, disclose)
12. Acknowledge commercial support (if applicable)
13. Provide required information to learners before the session (promotional materials/disclosures)
14. Award contact hours/validate completion (certificate)
15. Evaluate the activity

Educational Activity Characteristics

There are three types of educational activities that may be delivered via live or an enduring format:

1. **Provider-directed, Provider-paced:** The provider controls the main aspects of learning, which is determined based on a needs assessment and gap analysis. Examples include: live webinar, live course.
2. **Provider-directed, Learner-paced:** The learner determines the pace at which they will engage in the learning activity. Examples include: online course, self-learning modules.
3. **Learner-directed, learner-paced:** A learner takes an initiative to identify their own learning needs, formulating learning outcomes, identifying the needed resources for learning, choosing

and implementing the learning strategies, and evaluating the learning outcomes. The learner will also determine the pace at which they engage in the activity.

Planning Committee

Once you have identified a professional practice gap, the NP can begin to choose the members of the planning committee who will assist in planning the educational activity.

Remember – the Planning committee must have at least TWO members (one nurse planner and one content expert). The NP can function as both the NP and content expert, but there must be one additional person on the committee (example: speaker).

The NP is responsible for verifying the qualifications of the planners, speakers, authors, content reviewers, etc.

A content reviewer may a part of your planning process but they must be OUTSIDE of the planning committee. The content reviewer reviews content PRIOR to the activity for quality (best available evidence, scientific validity for example. The content reviewer may also review the content of the activity for bias or any other concerns.

Faculty, Presenters, and Authors

1. Faculty, presenters, and Authors **must** have documented qualifications to demonstrate their education and experience **in the content area they are presenting for this activity**. Subject matter expertise is evaluated based on education, professional achievements, 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, and authors **do not** all have to be nurses. Do not send CVs or résumés. Biographical data and COI forms **must** contain information specific to this activity. Include:
 - a. Faculty, presenters, and authors must be part of the planning committee.
 - b. The planning committee assures that the qualifications of the faculty, presenters, and authors are appropriate and adequate by the method(s) indicated.
2. The nurse planner evaluates whether each faculty, presenter, and author have any relationship(s) with a commercial interest organization.

Professional Practice Gap

Planning begins with this gap. It may be a desired intervention to address change that has to be made regarding a standard of care, a problem that exists in practice, or an opportunity for improvement.

The Nurse Planner will begin to analyze the need and why it exists. It must explain what is happening that creates the need for the planned activity. For example, “Nurses are not aware of new CDC guidelines regarding adult immunizations.”

Gap analysis is used to identify the difference between current knowledge skill or practice and desired best practice.

Step 1: Analyze the gap (or determine what is causing the problem):

What is the leading problem in practice or opportunity for improvement?

What are nurses doing (or not doing) that is leading to the problem (current state)?

Step 2: What is the current state compared to the desired state?

What is the current state (what does the situation look like at the present time)?

What is the desired state (what would it look like if the current problem was solved)?

Step 3: Make sure there is evidence to support the gap (analyze available data to validate the need for the educational activity).

What evidence is there? Data? Stakeholder input? Literature reviews?

Ways to analyze practice gaps include/show evidence:

1. Survey data
2. Input from stakeholders
3. Evaluation results
4. Outcome studies/QI projects
5. Literature trends
6. Other

Things to Remember:

1. Don't plan an activity JUST because you've done it every year. Think about WHY you are doing it ... what are you trying to accomplish by presenting the activity?
2. Don't plan an activity because "you know a good speaker." The activity MUST meet a documented LEARNER NEED.

Determining YOUR need:

Step 1: Look at your problem to determine if your need is a lack of knowledge, skills, or practice.

Causes of gaps:

1. A nurse doesn't "know" something (for example, a lack of information from an existing body of nursing knowledge or new regulations).
2. A nurse understands the process of something but lacks the "skill" to accomplish the task.
3. A nurse understands but something is still missing in the practice of the nurse.

Evidence to Validate the Professional Practice Gap

Describe WHY this is happening and how you know it could be better (new standards, new guidelines, research etc.) Describe the evidence that supports the existence of the professional practice gap.

Educational Need that underlies the Professional Practice Gap

The information must support the level of educational need described in this section. What evidence tells you that there is a need to acquire knowledge or improve skills? Be sure to add knowledge, skills or practice in this section.

Description of the Target Audience

RNs, specialty RNs, or other groups need to be described in this section. Who is attending?

Learning Outcome

Not objectives. Provide a measurable outcome statement that indicates what the learner will know, do, or be able to apply in practice at the conclusion of the activity. For example, "Participants will provide evidence of increased knowledge by stating at least one intended practice change related to care of the patient with CHF." Another example is, "100% of participants will demonstrate skill in interpersonal communication through role play."

Learning outcome is an explicit description of what the learner should know, be able to apply, and/or be able to do as a result of participating in an activity.

Learning outcomes must be written in measurable terms AND be measured (as part of the evaluation).

Examples:

- **Knowledge:** Demonstrate knowledge of evidence-based treatment for hypertensive patients by passing a post-test with a score of 80% or higher.
- **Skill:** Correctly identify required actions to manage patients in hypertensive crisis by analyzing a case study.
- **Practice:** Utilize an evidence-based protocol when caring for hypertensive patients.

Content Description

This should be a paragraph description or an outline summarizing the overall content of the activity. If this is a conference, provide a description of how the sessions contribute to meeting the outcome for the conference – do not describe each section.

Current Supporting References or Resources

List the references or resources (within the past five to seven years) used in developing the course content.

Learner Engagement Strategies

Describe how the learners will be able to actively participate in the activity. Lecture and PowerPoint DO NOT count as learner engagement strategies and do not need to be listed. Examples include but are not limited to the following: panel discussion, role play, questions and answers, practice demonstration, specific audiovisuals, case study analysis, etc. Strategies actively engage learners in the educational program. For example, a gap identified as a psychomotor skill should include learner engagement strategies that utilize demonstration and return demonstration.

Examples:

- **Knowledge:** Q&A, self-reflection, discussion
- **Skill:** demonstration, case scenario
- **Practice:** problem-based learning, case scenario analysis

Criteria for Awarding Contact Hours

This section must **explain how the learner can earn the contact hours**. It can include attendance for the entire activity, attendance of one or more sessions, completion/submission of an evaluation, completion/submission of a pre/posttest, successful completion of a return demonstration. This can be one or more of the previously discussed or something different based on your activity.

Description of Evaluation Method

How will you show the learners' change in knowledge, skills, and/or intent to change practice? (Relate this back to the desired learning outcome. If you said participants would pass a post-test, then one of your evaluation strategies is a post-test.)

A defined method for evaluating the activity must include learner input.

1. The evaluation must be related to the assessed need, the identified gap, and the desired outcome. **It must measure if the outcome was met.**
2. Evaluation mechanisms may be short term (post-tests, return demonstrations, role play, discussions, intent to change practice, etc.) or long term (reported change in practice, post-event surveys, observations, quality data, etc.).
3. A summative evaluation must be generated and reviewed by the nurse planners and/or planning committee for recordkeeping purposes.

Joint Providership

If provided – please attach required forms, if not list N/A.

Individual Activity Applicants may jointly provide educational activities with other organizations. The jointly providing organization **cannot** be a commercial interest. The Individual Education Activity Applicant is referred to as the provider of the educational activity; any other provider is referred to as a joint provider.

There are special rules for joint providership. Most importantly, the Individual Applicant must have a nurse planner activity involved in the activity planning.

Jointly-providing educational activities overview:

1. Two organizations work together to plan, implement, and evaluate an educational activity.
2. The APPLICANT is the “Provider,” others are “joint providers.”
3. The APPLICANT Nurse Planner (NP) must be actively involved in planning and is responsible for adherence to ANCC criteria.
4. The APPLICANT awards the contact hours.
5. A joint provider **must not be** a commercial interest organization.
6. Pre-activity information (e.g., promotional materials) must reflect the IEA APPLICANT awarding contact hours.
7. Learners must be informed of joint providership prior to the activity.
8. The APPLICANT must ensure that the APPLICANT organization maintains control of:

Ensuring Independence and Content Integrity

1. To ensure that NCPD activities are free from bias, all planners and presenters must disclose any financial relationships with ineligible companies. See form Key Steps for the Identification, Mitigation, and Disclosure of Relevant Financial Relationships for guidance.
2. The potential for bias exists when an individual has the ability to control/influence the content of an educational activity and has a financial relationship with an ineligible company (whose products/services are pertinent to the content of the activity)
3. The nurse planner is responsible for ensuring that individuals who have the ability to control/influence the content of an educational activity disclose relevant financial relationships with ineligible companies. **Unless the topic is NON-CLINICAL in nature – ex. Leadership
 - a. **Relevant relationships:** Relationships with ineligible companies (within the past 24 months) of any kind (no minimum amount).
 - Evidence of a relevant relationship with a commercial interest may include, but is not limited to, directly or indirectly receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (stock and stock options, excluding diversified mutual funds), grants, contracts, or other financial benefits from the commercial interest.
 - Financial benefits may be associated with employment, management positions, independent contractor relationships, other contractual relationships, consulting, speaking, teaching, membership on advisory committee or review panel, board membership, and activities from which remuneration is received/expected from the commercial interest.

- b. Procedures used to mitigate all relevant financial relationships with ineligible companies (if applicable) for the activity. See form *Key Steps for the Identification, Mitigation, and Disclosure of Relevant Financial Relationships* for guidance.

Example: Educational Activity Schedule/Agenda

8:00 – 8:10 am	Welcome & Introduction	10 minutes (not applicable)
8:10 – 8:30 am	Pre-test	20 minutes
8:30 – 9:00 am	Talk #1	30 minutes
9:00 – 9:20 am	Discussion	20 minutes
9:20 – 10:10 am	Talk #2	50 minutes
10:10 – 10:25 am	Break	15 minutes (not applicable)
10:25 – 11:15 am	Supervised Practice	50 minutes
11:15 – 12:15 pm	Lunch & Exhibits	60 minutes (not applicable)
12:15 – 1:35 pm	Panel Discussion	80 minutes
1:35 – 1:50 pm	Break	15 minutes (not applicable)
1:50 – 2:40 pm	Talk #3	50 minutes
2:40 – 2:55 pm	Questions and Answers	15 minutes
2:55 – 3:10 pm	Evaluation	15 minutes
330 minutes / 330 minutes divided by 60 = 5.5 Contact Hours		

Approval Statement

Communication, marketing materials, certificates, and other documents that refer to awarding contact hours **must** include the approval statement of the accredited organization. Indicate any method of announcing an educational event. This includes a brochure, flyer, bulletin board announcement, newsletter, memo, e-mail or website. Indicate which methods are used. **Submit this material with the application.** Promotional or advertising material may be the completed copy or a draft of the final material. The final version **must** be submitted with the required report following the educational activity.

The approval statement must be displayed to the learner and written **exactly** as indicated below. The term “accredited contact hours” **may not** be used. Contact hours are **awarded**.

This nursing continuing professional development activity was approved by the Pennsylvania State Nurses Association Approver Unit, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.

Pending Approval: If the provider of the educational activity must release the promotional and advertising material prior to receiving approval **and** has submitted an application to PSNA, the activity provider **must** state the following:

*This activity has been submitted to the Pennsylvania State Nurses Association for approval to award contact hours.
The Pennsylvania State Nurses Association Approver Unit is accredited as an approver of nursing continuing professional development by the American Nurses Credentialing Center’s Commission on Accreditation.*

Documentation of Completion

The applicant **must submit** a completed sample of the verification form/certificate awarded to the participants. The documentation (certificate) of successful completion of the activity should include:

1. Name of learner
2. Number of contact hours awarded
3. Name and address of the provider of the educational activity (if Web-based, include the website)
4. Title and date of the educational activity
5. Signature of nurse planner or responsible individual
6. Official approval statement

Disclosure Provided to Activity Participants

Learners must receive required information PRIOR to the start of an educational activity. In live activities the information must be provided to the learner prior to the initiation of the educational content. In enduring materials required information must be visible to the learner prior to the start of the educational content. Required information MAY NOT occur at the end of the educational activity.

Disclosure Always Required

1. **Approval Statement of the provider responsible for the educational activity**
2. **Notice of all requirements for successful completion of the activity.** Prior to the start of the activity, learners **must** be informed of the criteria used to determine successful completion of the activity. See the following criteria:
 - a. Required attendance (attendance at the entire activity, attend half day, miss no more than 10 minutes, etc.)
 - b. Successful completion of the post-test, if applicable
 - c. Completed evaluation form, if applicable
 - d. Return demonstration, if applicable

Disclosures Required only if applicable:

- a. **Relevant Financial Relationships:** Learners must be informed of a lack of any influencing relationships of planners, presenters, faculty, authors, and content reviewers in relation to the educational activity.
- b. **Commercial Support:** Learners must be informed if a commercial interest organization has provided in-kind or financial support for the educational activity.
- c. **Expiration of Enduring Materials:** Educational activities provided through an enduring format (i.e., print, electronic, Web-based) are required to include an expiration date documenting the period of time that contact hours will be awarded. This date **must** be visible to the learner prior to the start of the educational content. The period of expiration of enduring material should be based on the content of the material and not exceed the expiration date of the educational activity.
- d. **Joint Providership:** Learners must be informed of the provider of the educational activity and all other organizations that participated in the joint planning of the activity.

Recordkeeping

Providers of PSNA's approved CE activities will maintain detailed records about the activities for which contact hours were awarded. **Records need to be maintained for six years.** Recordkeeping requirements for each activity include:

1. All application documents (IAA application, disclosures, certificate, and financial relationship documentation)

Awarding Contact Hours

1. The appropriate measure for awarding credit in the entire national system is the 60-minute contact hour. **Contact hours** (not CEUs) will be awarded. **Reference to CEUs is incorrect.** **Referencing NCPD "Credits" is also incorrect.**

2. A contact hour is 60 minutes of an organized learning activity, which is either a didactic or clinical experience. To calculate the number of contact hours, add the total number of minutes of allowed time and divide by 60. (Refer to the example educational activity schedule.)
3. Fractions or portions of the hour may be calculated. The contact hour amount may be calculated to the nearest quarter, up or down. Example 1.78 would be 1.75, 1.95 would be 2.0.
4. Registration, welcome, introductions, orientation, breaks, and viewing of exhibits are **not** included in the calculation of contact hours. Evaluation **is** considered part of the learning activity and should be included in calculation of contact hours. When calculating hours, include any pre- and post-tests, practice, discussion, and evaluation.
5. Criteria for awarding contact hours of an activity **must be consistent with the learning outcome, content, and teaching and learning strategies.**
6. If the activity brochure accurately displays the breakdown of contact hours, a separate schedule is not needed.
7. Educational activities may differ in expectations and requirements for verification of participation and successful completion. Will participants be required to attend the entire event to receive contact hours? Will partial credit be awarded if only a portion of the activity is attended? Will skill demonstrations or role play scenarios be required? With partial credit: determine if learners must attend the entire activity or if partial credit may be awarded.

Commercial Support

Content integrity of the educational activity must be maintained in the presence of commercial support. The provider developing the educational activity is responsible for ensuring content integrity. Commercial support, exhibits, or the presentation of research conducted by a commercial company are not permitted to affect the design and scientific objectivity of any educational activity. Commercially supplied funds for an educational activity given in the form of an educational grant or in-kind assistance shall be acknowledged in the brochures and/or printed material for the activity. In the event that any form of commercial support is provided for an educational activity, the provider will maintain control of the education content and disclose to the learners all financial relationships, or lack of, between the commercial supporter and the provider or presenters.

Materials used for the educational activity must be free from commercial bias. To guard against the presence of commercial bias, the provider is responsible for ensuring the following:

1. Slides, handouts, or other materials presented to the learner related to the educational activity do not display logos or other trademarks of a commercial interest organization
2. Live (in-person) educational activities are presented without reference to a commercial interest organization and acknowledgement of commercial support is limited to the name of the entity providing support
3. Enduring materials do not include logos, trademarks, or other insignia of (or references to) a commercial interest organization and acknowledgement of commercial support is limited to the name of the entity providing support

4. Web-based materials do not include logos, trademarks, or insignia of (or references to) a commercial interest organization and acknowledgement of commercial support is limited to the name of the entity providing support
5. Evaluations of the educational activity make no reference to a commercial interest organization or its products or services
6. Learners are not recruited for any purpose during the activity or evaluation

In addition, there must be a **commercial support agreement** signed by both the provider and commercial interest group including the following:

1. A statement that the provider of commercial support may not participate in any component of the planning process of an educational activity, including:
 - a. Assessment of learning needs
 - b. Determination of learning outcome
 - c. Selection or development of content
 - d. Selection of presenters or faculty
 - e. Selection of teaching/learning strategies
 - f. Evaluation
2. A statement of understanding that the commercial support will be disclosed to the participants of the educational activity
3. A statement of understanding that the provider of the commercial support must agree to abide by the provider's policies/procedures
4. Amount of commercial support and/or description of in-kind donation
5. Name and signature of individual who is legally authorized to enter into contracts on behalf of the provider of the educational activity
6. Name and signature of individual who is legally authorized to enter into contracts on behalf of the commercial interest organization
7. Date the agreement was signed

There **must** be a method of documenting how commercial support was used for the educational activity or activities. Education must be kept separate from promotional activities. There must be a physical separation between exhibitors and educational sessions.