

# Continuing Education Program Development Operations Manual

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*Professional Seminars, LTD*

2018

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*Credits: Adopted from Donis Gil at Professional Seminars, LTD*

## **Mission Statement**

**Professional Seminars, LTD** seeks to provide quality continuing education to enhance the knowledge and skills of all of our participants. In seeking to provide quality continuing education to Physicians, Nurses and Athletic Trainers, we will ensure that this is done in an ethical manner, and that course participants are satisfied with our facilities, staff and curriculum.

## **Vision Statement**

**Professional Seminars, LTD** strives to comply with all required standards established by various National and State accrediting bodies; and in doing so Professional Seminars, LTD will ensure the continued provision of high quality continuing education programing, to all of its program participants. Professional Seminars strives to be the provider of choice for those seeking to enhance their clinical knowledge and skills.

## **Provider Responsibilities**

Professional Seminars, LTD (Professional Seminars) participates in the BOC Approved Provider Program. BOC Approved Providers are responsible for providing continuing education (CE) programs to Athletic Trainers and complying with the *Standards for BOC Approved Providers* and the *BOC Approved Provider Maintenance Requirements*.

- Professional Seminars is approved to offer Level I continuing education (CE) activities to BOC Certified Athletic Trainers (ATs). These are Category A CEUs.
- BOC Approved Provider status expires December 31, 2018
  - Renewal consists of a \$250 annual renewal fee due 12/31/2018
  - Completion of the Annual Report for ***all*** programs offered to ATs in early 2019
- The provider status is a blanket approval, which is granted annually and covers all Category A live events and home study programs offered by Professional Seminars.
- Evidence Based Practice (EBP) Category events are approved on an individual basis under a separate application. Allow additional time for review.

This operations manual serves to comply with the *Standards for BOC Approved Providers*. A complete list of administrative requirements and expectations are in Section 1 of the *Standards for BOC Approved Providers*.

## **Administration**

As a BOC Approved Provider, Professional Seminars must:

- Comply with BOC guidelines
- The Director of Continuing Education serves as the contact person who will be responsible for communicating with the BOC and disseminating information to anyone who will provide instruction to ATs
- The Director will:
  - Read and maintain compliance with the *Standards for BOC Approved Providers* and *BOC Approved Provider Maintenance Requirements*
  - Be knowledgeable of the domains of athletic training
  - Document changes in the primary contact
  - Ensure that the new primary contact understands and is in compliance with the Standards
  - Respond to all BOC staff inquiries and customer complaints within 1-2 business days
  - Notify the BOC of any organizational changes and update our online

BOC Approved Provider Profile

- Not assign or transfer our provider number to another individual or organization. Agreements clearly defining the working relationship between parties must be developed for co-sponsorship opportunities (see below)

## **Co-sponsor Agreement**

In the event that Professional Seminars cosponsors a program, a written agreement that clearly defines the working relationship between parties shall be developed, agreed upon and documented.

The co-sponsor agreement shall dictate which party is to complete the following tasks:

- **Planning Your Program**
  - Secure date, location and food
  - Determine audience
  - Determine topic and content development
  - Secure program faculty and forms
  - Determine Level of Difficulty
  - Create program schedule and assign CEUs
  - Determine registration procedures
  - Develop marketing materials
  - Create attendance roster
  - Create statement of credit
  - Create participant assessment
  - Create program evaluation
  - Post program to BOC Provider Directory
- **Event Administration**
  - Collect registration and fees
  - Provide attendance roster
  - Provide participant assessments and program evaluations
  - Distribute statements of credit
- **Evaluation and Review**
  - Retain records
  - Process complaints
  - Participate in Annual Review
  - Complete Annual Report

## **Business Practices**

BOC Approved Providers adhere to the Code of Ethics, appropriate language guidelines, copyright and conflict of interest outlined in Section 2 of the *Standards for BOC Approved Providers* and the *BOC Approved Provider Maintenance Requirements*.

## **Appropriate Language**

Use correct terminology on marketing materials and during programs when referring to the professional terms, credentialing, organizations, etc. Educate program Faculty on terms. Commonly confused terms include:

AT vs. ATC

Athletic Trainer vs. trainer

BOC vs. NATA

## **Non-Discriminatory Policy**

No individual should be denied participation in Professional Seminars' CE programs on the basis of race, color, national origin, religion, sex, disability, military status, sexual orientation or age. We must consider ADA requirements

## **Copyright Policy & Procedure**

Professional Seminars uses a Program Faculty Release Form, leasing agreement and other documentation to identify the permission of use for protected program materials.

Professional Seminars will ensure that copyright permission of materials used by program developers, program faculty or others are identified on program materials, including audio-visual and program related materials. Program faculty and sponsors will be required to complete a Release Form stating the use of copyrighted materials prior to participating in the program.

## **Conflict of Interest Policy & Procedure**

All individuals in a position to influence the content of a program to be offered for continuing education credits must disclose any relevant financial or nonfinancial relationship(s) that might affect independent involvement in the proposed program. Any program faculty or planning committee member who refuses to disclose financial or nonfinancial relationships will be disqualified from participating in the planning and implementation of the program.

Sponsors will be listed in the promotional materials. No registered, trademarked or copyrighted material, products or techniques will be used within the program. Eliminate product specific narrative from program. CEUs will not be given for time if products are mentioned, goods and services are promoted per the *BOC Approved Provider Maintenance Requirements* and ACCME requirements.

## **Identifying and resolving relevant financial and nonfinancial relationship(s)**

Professional Seminars requires that all individuals involved in the development and deliverance of program content offered for continuing education credit to disclose relevant financial and non-financial relationship(s).

- a. Prior to participating in the development of program content and/or in the deliverance of such content, individuals must complete a disclosure form. Individuals who refuse to complete the disclosure form will be disqualified and may not participate in the developing or delivering of program content.
- b. Professional Seminars reviews the completed disclosure forms.

- c. In the event of an identified financial or nonfinancial relationship, one or more of the following actions will take place to resolve the potential COI:
- We will engage the planner/program faculty in a guided interview process which seeks to understand how the relevant financial or nonfinancial relationship may influence the content of the program
  - The individual may withdraw from the planning committee or from being part of the program faculty
  - The individual may be excluded from the planning or delivery of the parts of the program related to the COI
  - The program may be subject to peer review by the remainder of the planning committee or an outside objective entity to ensure the absence of bias in its content
  - The program may be submitted for peer review to an external content expert

All actions to identify and resolve conflicts of interest among the individuals developing and presenting the program will be documented and retained for a minimum of 5 years.

### **Unresolved Conflicts of Interest**

If a conflict is identified for any program faculty or individual involved in the development of program content and cannot be resolved by the mechanisms described above, further action must be taken to prevent the introduction of bias into the activity. Such actions may include:

- Removal of the program faculty or individual involved in the development of program content from the program
- Offering the program or session, but not for continuing education credits

These requirements are also applicable to a program faculty or individual involved in planning program content who refuses to disclose financial relationships. These individuals are considered to be in conflict until appropriate disclosures are completed.

### **Disclosure to potential registrants and program attendees**

Professional Seminars must disclose to potential registrants and at the start of the program each program faculty's relevant financial and nonfinancial relationships to the program content. The provider must also disclose when program faculty have no relevant financial and nonfinancial relationships.

1. This disclosure information must be available in promotional efforts and at the start of the program.
2. The following information must be disclosed to learners:
  - The name of the program faculty;
  - Relevant financial relationship(s): Listing the name of the organization and the type of financial relationship; and/or

- Relevant nonfinancial relationship(s): Listing the name of the organization and the type of nonfinancial relationship; or
- No relevant financial or nonfinancial relationships exist.

### **Cancellation and Refund Policy**

Cancellations received at least 7 business days before the event are 100% refundable. There will be no refund for cancellations received later. If participants register and do not attend, they are still responsible for full payment.

Participants will need to contact Professional Seminars via phone or email with a request for refund:

Telephone #: (555) 555-5555

Email: seminars@professionalseminars.com

Professional Seminars will process the participant's refund within 3-5 business days from the day the request is received.

### **Grievance Policy & Procedure**

Professional Seminars is committed to conducting all activities in strict conformance with accreditation agencies and boards. Professional Seminars will comply with all responsibilities to be nondiscriminatory in activities, program content and in treatment of participants. Professional Seminars will provide participants with the ability to raise any complaints or concerns they may have.

While Professional Seminars attempts to assure fair treatment of all participants, we recognize grievances that may require intervention. Grievances are handled in the following manner:

- When a participant, either orally or in written format, files a grievance/complaint, the Continuing Education Committee will evaluate the nature of the complaint. If it is meritorious, the Continuing Education Committee will instruct the staff to implement any necessary changes in the course. The complainant will receive a response from the Continuing Education Committee or designated staff within 5 working days.

Participants may file a complaint by telephone or email:

Telephone #: (555) 555-5555

Email: seminars@professionalseminars.com

For a complete list of program development requirements adhere to the Sections 3, 4, 5, and 6 of the *Standards for BOC Approved Providers* and the *BOC Approved Provider Maintenance Requirements*.

## **Procedures for Program Development**

Professional Seminars' Courses/Seminars/Programs ("Programs") are created, developed and/or approved by Professional Seminars' Continuing Education Committee. The committee is led by the Director of Continuing Education and comprises subject matter experts in the field of orthopedics, sports medicine and athletic training. The Continuing Education Committee members are knowledgeable about the required standards established by ACCME, ANCC and BOC. CE activities must be intended for healthcare providers and focus on knowledge, skills and abilities related to healthcare activities. Programs should not include patients, parents, coaches, administrators or teachers.

### **Determine Program Type**

#### **Live Event vs. Home Study**

Live events are programs that involve interaction between the program faculty and participant in real time. Programs may be in person or online. Conferences, conventions, grand rounds, labs, symposiums, webinars and workshops are acceptable methods of instruction for live events.

"Home study" is defined as an individually-completed course whose content is contained in written, computerized or videotaped media. Home study programs do not have a live facilitator or program faculty, but may have faculty via video, CD or web recording. Home study programs must meet the same standards as any other CE program. BOC Approved Providers must use specific criteria when determining the number of CEUs for recorded and text-based or non-timed courses.

### **Complete Educational Need and Professional Practice Gap Analysis**

Topics are determined to address a needs analysis in the field of orthopedics, sports medicine and athletic training. Content is based on a knowledge, competency or performance gap, to identify current, valid findings in the literature. Content must fall within the practice analysis for invited participants and be delivered at or above entry-level knowledge and skill for the associated profession. Topics are also presented to the Continuing Education Committee by potential program faculty to be reviewed and approved for program creation.

### **Learning Objectives/Program Content**

Learning objectives are the basis for an educational program. Once a topic has been determined, course outcomes/learning objectives that define the knowledge and/or skills that program participants are expected to gain through the completion of the course are created. Each program must have corresponding learning objectives. Learning objectives shall be formulated using Bloom's Taxonomy (See *BOC Approved Provider Maintenance Requirements*). Avoid using: appreciate, comprehended, experiences, know, learn or understand as they are not measurable.



Program content is then created based on these learning objectives. The creation of the content is done by either the Continuing Education Committee or in conjunction with the chosen program faculty.

Program faculty must submit their program content and materials to the Continuing Education Committee for review. Once all content is submitted and reviewed, suggestions are made to the program faculty (if warranted) to ensure they meet the goals of the program. Revisions are made and reviewed until the course learning objectives are appropriately met.

## **Choosing Qualified Program Faculty**

### **Program Faculty Qualifications**

Program faculty are selected based upon their knowledge of the subject matter; experience and teaching ability; and ability to meet the educational needs of the course participants.

### **Program Faculty Requirements**

Professional Seminars program faculty must provide the following documents prior to the provision of any course:

- Curriculum vitae
- Program Faculty release form (see *BOC Approved Provider Maintenance Requirements*)
- Current bio – to be used in all marketing materials
- Written statement declaring any conflicts of interest or lack thereof. This can be included at the beginning of the course presentations
- List of at least 10 references supporting course content. References must be from within the last 5 years
- All presentations in hand-out format at least 45 days prior to the course. These are needed to create course materials/handouts
- Outline/agenda of lectures
  - Title of presentation and learning objectives
  - Estimated time of each lecture (for CEUs)
  - Proposed method of instruction

### **Program Faculty Compensation**

Program faculty honoraria is \$200 per presentation. Expense reimbursement will be provided for any expense that the program faculty incurs in association with the program they are presenting. Program faculty are required to submit all appropriate receipts for expenses incurred (i.e. flights, accommodations, meals, etc.) to Professional Seminars within 2 weeks following the completion of the course.

## **Determine Program Format and Size**

The format of the program will be determined based on the content created by the program faculty and the Continuing Education Committee. The inclusion of breaks such as breakfast, lunch and coffee breaks will also be determined by the program faculty and the Continuing Education Committee. The format is also dependent on what will best achieve the program's chosen learning objectives.

The size of the program will be determined based on the format of the educational program as well as the number of available qualified program faculty. Lab and hands-on programs beyond will be limited to 1 program faculty per 12 participants. Lecture-based programs may be larger and would then be limited by the size of the venue.

## **Determine Program Date and Location**

### **Choosing a Date**

Program dates will be determined and approved by the Continuing Education Committee. These dates will be chosen based on the following guidelines:

Professional Seminars program dates shall not interfere with major federal or religious holidays, nor with any major national conferences held by relevant national associations (i.e. AAOS, AAPA, NATA).

Program faculty may suggest potential dates for courses to the Continuing Education Committee for approval.

### **Choosing Location**

Location will be chosen based on the following criteria:

- Comfortably accommodates the predetermined number of attendees
- Is accessible via all forms of transportation
- Provides appropriate space/facilities for the format of the program
- Has nearby access to food and drink options for programs for which lunch is not provided
- Access to A/V equipment (if available)

## **Continuing Education Credits/Approval**

### **Accreditation Council for Continuing Medical Education (ACCME)**

Follow: <http://www.accme.org/cme-providers>

*Professional Seminars, LTD designates this live activity for a maximum of [number of credits] AMA PRA Category 1 Credit. Physicians should claim only the credit commensurate with the extent of their participation in the activity.*

## **American Nurses Credentialing Center (ANCC)**

ANCC recognizes the development and delivery of high quality continuing nursing education by organizations worldwide, including health ministries, nursing organizations, employers and education providers.

*Professional Seminars, LTD is accredited as a provider of continuing nursing education by the American Nurses Credentialing Center's Commission on Accreditation.*

## **Board of Certification (BOC)**

*Professional Seminars, LTD (BOC AP# P1234) is approved by the Board of Certification, Inc. to provide continuing education to Athletic Trainers. This program is eligible for a maximum of (#) Category A hours/CEUs. ATs should claim only those hours actually spent in the educational program.*

*Professional Seminars, LTD shall apply for EBP category continuing education approval when applicable.*

*Professional Seminars, LTD shall utilize and adhere to the BOC Approved Provider Maintenance Requirements and the 2018 Standards for BOC Approved Providers, when creating educational programming for Athletic Trainers (ATs).*

## **Calculate Amount of Contact Hours/CEUs**

Professional Seminars utilizes guidelines provided by the various national and state boards in order to calculate the appropriate amount of contact hours/CEUs available for a program. Credit shall not be awarded for educational programs that 1) do not fall into one of these domains or 2) are presented below the level of an entry level certified Athletic Trainer.

Below are some of the guidelines available:

### **ACCME and BOC Calculation for Live Programs**

For live Category 1/Category A programs, one contact hour is equal to 1.0 CEUs, in which the contact hour is defined as 60 minutes of instructional time during which the participants are engaged in educational activities. Contact hours are rounded to the nearest quarter hour.

### **BOC Calculation for Home Study Programs**

For text based and non-timed Home Study Programs, utilize the Mergener formula. (See *BOC Approved Provider Maintenance Requirements*)

## **Determine Program Difficulty Level**

Based on the content of the program, a difficulty level will be determined using the categorization criteria developed by the NATA Professional Development Committee (PDC) (See *BOC Approved Provider Maintenance Requirements*):

## **Program Implementation**

### **I. Planning Your Program**

#### **Create Online Registration Page**

The program's online registration page will be created, linked and posted to the main Professional Seminars site ([www.professionalseminars.com/seminars](http://www.professionalseminars.com/seminars)) prior to the creation and distribution of any marketing materials related to the program. This will allow the attendees to electronically register and pay for the program.

#### **Marketing**

All programs, including in-house events, must have corresponding promotional materials. Coordinate a marketing campaign with the marketing department that would be able to appropriately reach the chosen target audience in order to ensure optimal attendance. Target audience will be determined based on the topic and content offered by the program.

#### **Create Program Brochure** (See *BOC Approved Provider Maintenance Requirements*)

Program brochures will be created in conjunction with the marketing team in order to maintain brand consistency and must include requirements outlined in the *BOC Approved Provider Maintenance Requirements*.

Brochures will be distributed via postal mail, email and/or both. Distribution method will be determined in conjunction with the marketing team. Distribution list consisting of specific target audiences may also be purchased from reputable sources and used to market the program.

#### **Program Materials**

The purchasing of program materials such as pens, folders, flash drives, binders, etc., will be determined by the Clinical Education Committee in conjunction with the marketing team.

Course booklet/handouts will be created using the presentation materials created and submitted by the program faculty and/or by the Continuing Education Committee. These booklets/handouts may be compiled in either print or electronic format for delivery during or prior to the start of the program.

## **Submit Program to BOC Program Directory**

In accordance with the *BOC Approved Providers Maintenance Requirements*, all continuing education programs aimed at ATs must be submitted to the BOC Program Directory. List ***all*** recognized continuing education programs available to ATs, including both live events and home study programs, and to promote the provider.

## **Procedures**

- A completed electronic event form must be submitted to the BOC at least 10 business days prior to the program start date
- The electronic form is available within the BOC Approved Provider Profile
- List all continuing education programs available to ATs on the Program Directory, including both live and home study, private and open registration
- Programs that are not posted to the directory 2 weeks prior to the program date shall not be eligible for Category A continuing education
- Providers who offer programs not listed on the directory must notify participants that the programs are not eligible for Category A CEUs

## **II. Event Administration**

### **Attendance Roster/Sign-in Sheet**

All program participants will be required to sign in at the beginning of all live programs.

### **Legal documents/agreements/consents**

Some programs may require that participants provide legal consent in order to participate in the programs labs/activities. In such event, the documents will be provided at the beginning of the program so that the participants may read and sign the consent. A copy of the signed document may be provided upon the participant's request.

### **Conflict of Interest**

Professional Seminars program faculty, as well as program sponsors, are required to declare any and all potential or actual conflict of interest at the beginning of each program. No registered, trademarked or copyrighted material, products or techniques will be used within the program. Eliminate product specific narrative from program.

### **Participant Assessments**

Professional Seminars creates participant assessments to measure participants' mastery of the program content. The assessment allows participants to explain how they plan to incorporate the new skill and/or knowledge into their clinical practice to improve patient outcomes. Assessments must reflect the educational methods, measure the learning objectives of the program and provide participant feedback.

For lecture programs, a pre- and post-test will be used to determine each participant's mastery of the content. Lab, hands-on or other participation programs will require a rubric to assess mastery of the learning objectives.

### **Program Evaluations**

Program evaluations must be developed and conducted for each educational program. See *BOC Approved Provider Maintenance Requirements* for list of requirements. Completed evaluations are reviewed and feedback is summarized for future program improvements.

The information collected from the program evaluations will be used to make improvements/adjustments to future programs as needed. Feedback about the program and its program faculty may also be used to evaluate the program faculty's performance.

## **III. Evaluation and Review**

### **Distribute Statements of Credit**

Statements of Credit will be provided to all program participants after they have satisfied all of the following requirements:

- Signed in
- Completed the program
- Passed participant assessment
- Completed program evaluation
- Signed out

Document must include requirements outlined in the *BOC Approved Provider Maintenance Requirements*.

### **Program Feedback**

Data and feedback from program evaluations will be compiled, thoroughly evaluated and synthesized. A summary of all feedback will be provided to the Continuing Education Committee for later review.

Feedback information will also be provided to all of the program faculty within 10 business days, so that they may make any necessary adjustments to their program content.

### **Internal Program Review**

Professional Seminar's Continuing Education Committee conducts an annual internal review of all of the program offerings each December. During this annual review, the Continuing Education Committee will evaluate the programs' efficacy and will provide recommendations for improvements based on the available feedback.

The Continuing Education Committee will also evaluate the program faculty and will provide them with feedback to help improve or refine their teaching and learning methods as well as their presentation materials.

### **Program Records**

Professional Seminars will keep program records for a total of 5 years following the completion date of the program. Participants will be allowed to request a copy of their statement of credit at any point within that time period. The fee for replacement statements of credit is \$10.

### **Process Complaints**

Any complaints or concerns raised by program participants will be addressed in a timely manner and in accordance with Professional Seminars' Grievance Policy.

SAMPLE