

STEP 8. ARRANGE FOR CONTINUING EDUCATION CREDITS

Continuing Medical Education units (CMEs) and Continuing Education Nursing units (CEs or CNEs) can be of value to members of your audience and provide an incentive to attend the training. Many healthcare practitioners are required to earn a certain average number of credits per year in order to maintain their licenses or advance to higher positions. Other types of continuing education credit exist and can be explored, based on your audience.

Before you can offer CMEs and CEs, your organization must be approved as a continuing education provider by the appropriate board, or you must find an existing accredited agency (often an American Lung Association affiliate, a State health program, or a university) to co-sponsor your event. In either case, the course content, format, and faculty must meet certain requirements. To learn about accreditation requirements and regulations, contact:

- For CMEs: Accreditation Council of Continuing Medical Education (ACCME, 15 N. State Street, Suite 2150, Chicago, IL 60610; (312) 464-2500; <http://www.accme.org>), your state medical society, or the American Lung Association
- For CEs: Your state Board of Nursing or the equivalent agency (often local health departments have CE accreditation)

You will want to include information on course credit in your marketing materials, so be sure to begin this process in well in advance of the scheduled date of the training program. The accrediting agency will probably require four to six weeks to review and process your application.

Accrediting agencies conduct periodic reviews or audits to ensure that procedures are being followed and requirements are being met. It is essential, therefore, to keep complete and accurate records to document that participants have earned the credit units they have been awarded. Important records include the course sign-in sheets and the completion certificates sent to participants after the course.

PRE-COURSE TASKS

ACTIVITY 8-A

If your agency is not already accredited to offer continuing education hours, identify a potential co-sponsor (including American Lung Associations, state and county health departments, and universities) and contact that organization to request information about offering course credit and obtain application forms. Or if you prefer, contact the appropriate agency to pursue your own accreditation.

ACTIVITY 8-B

Submit your application forms, fee, and any requested supporting documentation (for example, a copy of the course brochure) to the accrediting agency.

Associated Tool #9 Continuing Education Co-Sponsorship Application

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-C

Calculate the number of CME or CE credits that participants will earn. Course credit is figured by adding up the total number of course hours (adjusted to the nearest quarter hour) and subtracting time for breaks, lunches, registration, and introductions. Nurses earn slightly more credit for their contact hours than doctors (see your accreditation agencies' policies to determine correct amount).

ACTIVITY 8-D

Ensure that the marketing materials for the course enumerate the CME or CE credits that can be earned and include any information that the accrediting agency requires. (The California Board of Registered Nursing, for example, issues identifying numbers to continuing education providers and asks that the number appear on all promotional materials and completion certificates.)

Associated Tool #10 Course Brochure

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-E

For the course portfolio (see Step 7: Training Materials), prepare a credit information page according to the specifications of the co-sponsor or accrediting agency that tells participants:

- The name, date(s), and location of the course
- The number of hours of instruction offered
- The name of the accreditation agency that has approved the credit
- Your agency's name and identifying number as the continuing education provider
- The requirements (attendance, pre-/post-test, evaluations) that must be completed in order for the participant to receive credit
- Your timeframe for sending out completion certificates

Associated Tool #39 Credit Information Page

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #61 Wording for C.E. Certificate

(Source: Francis J. Curry National TB Center, San Francisco)

DAY-OF-EVENT TASKS

ACTIVITY 8-F

Ensure that the participants sign the sign-in sheets at the beginning of each day and at subsequent points in the day (e.g., on returning from lunch) if that is required by the accrediting agency.

Associated Tool #46 Sign-in Sheet

(Source: Francis J. Curry National TB Center, San Francisco)

POST-COURSE TASKS

ACTIVITY 8-G

Use the sign-in sheets to determine the number of units to be awarded to each participant (did they arrive late? leave early? This should be reflected on sign-in sheet). Double check to make sure participants signed-in and (if they requested CE/CME units) provided their medical license numbers. Original sign-in sheets (not copies) must be filed in course credit file (see below).

ACTIVITY 8-H

Prepare and mail certificates of completion and/or certificates of CME or CE credits for the participants. (Some training organizations choose to preprint these certificates and hand them out to participants at the completion of training.)

Associated Tool #58 Continuing Education Certificates

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #59 Certificates of Completion

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-I

Set up a course credit file that contains items required by co-sponsoring

agency or, if your organization is accredited, that the accrediting agency can review if you are audited. This file includes:

- All marketing materials (brochure)
- Documentation regarding the course curriculum and agenda, including the number of training hours
- A summary of results from the needs assessment if one was conducted
- Faculty disclosure of commercial support statement
- Sign-in sheets from the training days, showing participants' signatures and time of arrival or departure if they arrive late or leave early
- Copies of each participant's certificate of completion
- Summaries of evaluations and pre- and post-tests
- Curricula vitae for all faculty

Associated Tool #7 Course CME Credit File

(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #8 Continuing Education Course File
Checklist**

(Source: Florida Department of Health)

Associated Tool #2 Preliminary Course Checklist

(Source: Florida Department of Health)

Associated Tool #10 Course Brochure / Application

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #16 Course Agenda

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #22 Faculty Disclosure Statement

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #46 Sign-in Sheet

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #55 Summary of Evaluation Data

(Source: Francis J. Curry National TB Center, San Francisco)

**Associated Tool #56 Summary of Pre-/Post-Course Scores
Per Participant**

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #58 Continuing Education Certificate

(Source: Francis J. Curry National TB Center, San Francisco)

Associated Tool #6 Needs Assessment Survey Summary

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-J

Put these items into course credit file or, if you have a co-sponsor send relevant materials to the organization that co-sponsored your event and/or provided units to participants.

Associated Tool #7 Course CME Credit File

(Source: Francis J. Curry National TB Center, San Francisco)

ACTIVITY 8-K

Update your database to include the participants' course status and credits earned.