

CHECKLISTS FOR JOINT PROVIDERSHIP of EDUCATION ACTIVITY

*The following checklists and forms are your guides to accreditation compliance for education activities that are jointly provided by A.S.P.E.N. Primary checklist may reference second-level checklist or specific forms for specific tasks such as syllabus production. PLEASE help us keep our accreditation status by fulfilling your contractual obligations. The Chapter CE Handbook has a wealth of information for you to ensure compliance.*

**I. Development Phase**

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| **√** | ***TASK*** |
|  | Form an interdisciplinary planning committee including at least one dietitian, nurse, pharmacist and physician   * Collect contact information, disclosures and CVs * Save all planning committee meeting minutes |
|  | Submit a letter of intent to apply for joint providership. Minimum requirements   * Name and mission of requesting organization * Description of the program including anticipated date, time and location of the event * Names and contact information for planning committee members * Conflict of interest disclosure statements for each planning committee member * Preliminary program budget including projected revenue and expenses * Submit by predetermined deadline based on timing of the event * There should be no discussions with industry about the event and planned content |
|  | Continue event planning   * Include A.S.P.E.N. liaison on the event planning communications – this is a member of the A.S.P.E.N. Education and Professional Development (EPD) Committee * As a committee, conduct the needs assessment and complete a practice gap analysis. Document all. * Develop event goals and objectives * Plan the event * Select and invite faculty * All planning work should be documented (including minutes) and maintained in files for later submission to A.S.P.E.N. |
|  | Submit your proposed program to A.S.P.E.N. for review by the Education & Professional Development (EPD) Committee according to appropriate deadline   * Complete the Chapter Proposal for Education Activity Form in its entirety * Include CVs for speakers and planning committee members. Ensure proper speaker selection practices were adhered to – refer to handbook * Include conflict of interest disclosure statements for all speakers and planning committee members (if changes based on what was submitted in letter of intent) |
|  | Upon agreement by the committee to jointly sponsor the proposed educational activity,   * Sign your **contract** with A.S.P.E.N. and return it to the national office. |
|  | Submit deposit of $250 with the signed LOA |
|  | Event Logistics   * Create a pricing structure for the event – include member and nonmember fee structure. Submit to A.S.P.E.N. with detailed event description for creation of the event to accept registration * Create a refund policy to be adhered to by chapter leaders and A.S.P.E.N. staff * Develop marketing materials (brochures, flyers, emails, websites, etc.) while adhering to the accreditation standards described in the handbook. (See additional program materials check list) * Submit all marketing materials to A.S.P.E.N. staff for review before sending out or publishing * As desired, work with industry partners to obtain support for the program. A.S.P.E.N. does not secure industry support for chapter events * Obtain LOA from all industry partners and submit to A.S.P.E.N. for CEO or COO signature once signed by chapter president and industry partner |
|  | Speaker Management   * Obtain speaker release * Obtain speaker disclosure information (if changes to what was submitted with proposal) * Obtain speaker CV (if changes to what was submitted with proposal) * Obtain signed speaker contract * Provide speaker contract that specifies reimbursement policy, honorarium (if used). Provide instructions that define desired teaching methods such as active participation in the learning – presentation level & target audience – topic and time restrictions - requirements/deadlines for submission of syllabus and presentation materials (including presentation objectives, outline or summary, reference list, self-assessment questions/answers or case study, PowerPoint slides) * Collect slides from speakers review for formatting and inclusion of commercial bias (planning committee members and staff to review. A.S.P.E.N. will need a final copy of the presentations whether or not they are provided to attendees) * Facilitate presentation slide edits with speakers |
|  | Develop Event Materials – minimum is a conference program   * Refer to syllabus check list for details * Provision of copies of slides to attendees is not required * Submit syllabus to A.S.P.E.N. **30 days prior to the event** for review * Submit edits to event evaluation to A.S.P.E.N. **60 days prior to event** * Submit post test questions, if desired * Pay balance of joint providership fee to A.S.P.E.N. 6 months prior to the event |
|  | Keep **minutes of planning committee** meetings, emails, and other documentation of the planning process and submit to A.S.P.E.N. |
|  | Finalize **time schedule** – submit to A.S.P.E.N. |
|  | Estimate audience size, insure **facilities** will accommodate attendees |
|  | Design Audio/Video set up |

II. Implementation Phase: on site management

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| ***√*** | ***TASK*** |
|  | Ensure comfortable learning environment for attendees. |
|  | Ensure that NO promotional activity occurs in the same room as the educational activity. |
|  | If a commercial product must be used in a presentation (as for an equipment demonstration), place a sign near the equipment that says “ Presence of this (PRODUCT) does not imply endorsement by any accrediting organization”. Document this sign. |
|  | Provide sign in sheets or check off pre-registration list INCLUDING discipline of each attendee (REQUIRED!). Account for on-site registrations as well. |
|  | Distribute Course Syllabi |

**II. Post Program Requirements**

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| ***√*** | ***TASK*** |
|  | Submit to A.S.P.E.N. the registration forms and payment for onsite registrations. Should be done immediately after the event. |
|  | **Submit the following to A.S.P.E.N. 30-45 days post event**   * Income and expense statement (budget vs. actual) * Attendance roster per discipline as compared to registration numbers * Copies of all files pertaining to program development, marketing, execution and follow up. * **If not previously submitted:**   Faculty disclosure forms, contracts, release (if applicable), CVs.  Committee minutes  Final Syllabus with program outline  Final presentation slides from speakers  Commercial support contracts – signed.  Resolution of any conflict of interest for speakers and planning committee members |

**Program Materials Checklist of Required Items**

| **√**  **OK** | **SYLLABUS** | **√**  OK | PROMOMOTIONAL **MATERIAL** | **ITEM** |
| --- | --- | --- | --- | --- |
|  | Yes |  | Yes | Education purpose, goals and learning objectives for the event |
|  | Yes |  | Yes | Target Audience |
|  | Details below |  | Yes | Faculty members, credentials/degrees |
|  | Yes |  | Optional expansion of faculty info | Faculty members, credentials/degrees, title/position, institution and state |
|  | Yes |  | Note | Faculty and planning committee member Disclosure Information (for Promomotional materials, you may state how audience will receive disclosure & what info.) Disclosure information should be at the front of the syallbus. |
|  | No |  | Yes | Fees and a clear statement of items that are or are not covered by those fees, as well as deadlines and cancellation policy. |
|  | No |  | Yes | Refund information (including no refund if applicable) |
|  | Yes |  | Yes | Schedule of educational activities (begin & end times) |
|  | Yes |  | Yes | The amount of continuing education credit, specified in CME, contact hours, CEUs, and CPEUs that can be earned through participation and successful completion of the program. |
|  | Yes |  | Yes | The official logo of each accrediting organization is used as appropriate in conjunction with the official statement identifying the approved provider(s) sponsoring or co-sponsoring the program. (A.S.P.E.N. will provide )   * ACPE (logo and UAN numbers and activity type) * ANCC COA (logo) and statement “Attendance at this activity does not qualify nurses to alter their scope of practice”, statement that product endorsement on behalf of A.S.P.E.N. does not exist * ACCME joint-sponsor statement and PRA notice. * CDR logo & difficulty level 1, 2 or 3. |
|  | Yes |  | Yes | Americans with Disabilities Act statement |
|  | Yes |  | No | Policy on grievances |
|  | Yes |  | Yes | Define successful completion (Requirements to receive credit) i.e. attend in full, complete evaluation, take test… |
|  | Yes |  | Yes if known | Acknowledgement of outside organization(s) providing financial support will be included, but will not be product specific. MUST BE AT THE BEGINNING OF THE SYLLABUS |
|  | Yes |  | Yes | Educational activities distinguished from non-educational |
|  | Yes |  | Yes | Release (Presentation) date and schedule. Expiration date if applicable |
|  | Yes |  | No | Objectives for each presentation. |
|  | Ideal to have |  | No | Self-Assessment exercises for each presentation i.e. solve case study, answer minimum of 3 questions. |
|  | Yes |  | Yes | Computer requirements – hardware and software- when applicable |
|  | Yes |  | Yes | Mechanism to reach the provider/provider contact information |