EDUCATIONAL DESIGN PROCESS

This section outlines the process of developing and/or evaluating individual educational activities according to ANCC/MONA Accreditation Program criteria and provides helpful tips to assist applicants with the completion of the educational activity application. The educational design expectations described in this section are fundamental to high-quality continuing nursing education (CNE). Accordingly, applicants must ensure that these expectations are met and that the ANCC/MONA Accreditation criteria are applied in such a manner as to ensure the applicant’s Approved Provider Unit provides educational activities that meet these criteria. ANCC’s/MONA’s Accreditation criteria specify a comprehensive set of educational design criteria to ensure that educational activities are effectively planned, implemented, and evaluated according to educational standards and adult learning principles. CNE involves “systematic professional learning experiences designed to augment the knowledge, skills, and attitudes of nurses, and therefore enrich nurses’ contributions to quality healthcare . . .” (ANA, 2010, p. 43). The knowledge, skills, or attitudes gained from CNE activities can be applied regardless of the activity participant’s employer.

In contrast, staff development activities are typically designed to enhance performance in participants’ current job roles and are based on a specific facilities/organization’s policies and procedures, equipment, and resources. When staff development learning activities convey new content knowledge that would be transferable to other job settings, the organization may be able to award contact hours. Some in-service programs, based on their content, may include new, transferable knowledge. Staff development departments may offer both CNE activities and in-service activities. For instance, orientation programs are typically facility-specific or organization-specific. Contact hours may not be awarded for the employer-specific content. Contact hours may not be awarded for review or refresher courses that focus on functioning in a particular facility or reinforcing basic knowledge. However, contact hours may be awarded for refresher courses that provide nurses reentering the job market with advanced knowledge or a new skill set required to function in the role as an RN.

Types of activities:

Provider-directed, provider-paced: The provider controls all aspects of the learning activity. The provider determines the learning objectives based on a needs assessment, the content of the learning activity, the method by which it is presented, and evaluation methods. (Examples include live activities and live Webinars.)

Provider-directed, learner-paced: The provider controls the content of the learning activity, including the learning objectives based on a needs assessment, the content of the learning activity, the method by which it is presented, and the evaluation methods. The learner determines the pace at which the learner engages in the learning activity. (Examples include print articles, online courses, e-books, and self-learning modules/independent studies.)

Educational activities must meet the following guidelines in order to be eligible for awarding of continuing education credit (contact hours):

- Content must be beyond basic knowledge
- Content must be generalizable regardless of employer of the nurse
- Content must enhance professional development or performance of the nurse

Determination of whether to award continuing education credit may be dependent on the learner, for example:

- If the course is the same course repeated every year for nurses, the nurse has taken the course previously, and no new content is included, it should not be classified as continuing education
- If the class is being offered to a new nurse and the content is new and is generalizable knowledge, it can be classified as continuing education
- If the class is being repeated to nurses who have taken the course previously and a portion is new and updated information, the new information can be classified as continuing education
Content must be:
- Evidence-based or based on the best-available evidence
- Presented without promotion or bias
- An educational activity may include content that is eligible for continuing education credit and content that is not eligible for continuing education credit. In that circumstance, continuing education credit may be awarded for the content that is eligible.

**PLANNING:** The Nurse Planner is responsible for ensuring completion and review of Biographical Data/ Conflict of Interest forms by each Planning Committee member, each faculty/presenter/author and each content expert to ensure appropriate qualifications and evaluation of actual or potential bias. Faculty/ presenters/authors must have documented qualifications that demonstrate their education and/or experience in the content area they are developing or presenting. Expertise in subject matter may be evaluated based on characteristics such as education, professional achievements and credentials, work experience, honors, awards, professional publications, or similar. The qualifications must address how the individual is knowledgeable about the topic and how the individual gained that expertise. Please remember the following two elements related to the biographical data/conflict of interest form:

- The Nurse Planner is responsible for reviewing each biographical data/conflict of interest form submitted to ensure proper completion, qualifications, and evaluation of actual or potential relevant relationships to impart bias, and signing the bottom of each form.
- The Nurse Planner must have another individual who is involved in the planning review and sign off on their biographical data/conflict of interest form, rather than signing and co-signing their own form.

The MONA CE Approver Unit recommends the MONA Combination Biographical Data and Conflict of Interest Form or another concise form to obtain and present the required information so that reviewers are not required to make a subjective judgment regarding expertise from many pages of accomplishments that may be unrelated to the educational activity. If the MONA form is not utilized, the Nurse Planner must ensure that the form used contains all of the required, pertinent information requested on the MONA developed form, including a signature line for the Nurse Planner to show that the form has been reviewed and approved. The review committee is looking at the knowledge and expertise the committee members have for this particular educational activity.

The Planning Committee, during the planning process, may also identify an individual(s) who function as content reviewer(s). The purpose of a content reviewer is to evaluate an educational activity during the planning process or after it has been planned but prior to delivery to learners, for quality of content, potential bias, and any other aspects of the activity that may require evaluation. Content reviewers must also complete Biographical/Conflict of Interest forms that are reviewed by the Nurse Planner. The Nurse Planner is responsible for evaluating actual or potential conflicts of interest and applying the resolution process to an actual or potential conflict of interest, if present.

One planner needs to have appropriate subject matter expertise for the educational activity being offered. If additional individuals, such as faculty, presenters, or authors, will be creating or delivering content for the educational activity, Planning Committee members must identify the needed qualifications of the individuals chosen. The qualifications identified for faculty/presenters/authors for the educational offering may include but are not limited to:
- Content expertise
- Demonstrated comfort with teaching methodology (e.g., Web-based)
- Presentation skills
- Familiarity with target audience

During the planning phase, the Planning Committee is responsible for determining how participants will successfully complete the learning activity. The committee also evaluates whether the activity has or will have sponsorship or commercial support and, if so, how content integrity will be maintained, including what/how precautions should be taken to prevent bias in the educational content, and the methods that will be used to ensure full disclosure to activity participants.
When non-nurses are a part of the activity, it is important to ensure that there is a mechanism for relating the information to nursing practice. A nurse member of the planning committee can be assigned to work with the non-nurse presenter to ensure a relationship between the content presented and the role of the nurse. At the educational activity, an RN-moderator or session leader can tie together the content presented with the role of the RN. Periodically the MONA CE Approver Unit Committee reviewers have noticed that LPNs are listed as faculty/presenters/authors in educational activities for registered nurses. It must be clear to the reviewers what knowledge or expertise the LPN has that is not a part of the knowledge of RNs. Even though an LPN is working in a diabetic clinic where new diagnostic tests are being used, she/he may not be the most appropriate person to address this topic at an educational activity where RNs are the primary target audience.

The content and methodological expertise, if relevant, of the faculty/presenters/authors must be documented with the MONA combination biographical data and conflict of interest form that summarizes qualifications to present/develop the particular content.

**Design Principles:** The educational design process incorporates measurable educational objectives, best-available evidence, and appropriate teaching methods. Once a gap in knowledge, skills, and/or practice has been identified through the needs assessment findings, thereby validating the need for the educational activity, the purpose can be developed.

Gaps are identified to indicate the difference between where learners currently are in their knowledge, skill, and/or practice and where they need to be in order to achieve the desired outcome. Needs assessment and gap analysis are used widely in both educational and practice venues to support the value of an educational initiative. Criteria require that providers identify the target audience for each proposed learning activity and document evidence of the gap that exists prior to the educational activity. This also provides the foundation for determining and planning to measure the outcomes of the education.

**Content** for the educational activity must be congruent with each objective. Descriptions of content should not be a restatement of the objectives. Outline or briefly summarize the content to support/accomplish the stated objectives. The content area column on the educational planning tool must include enough information to demonstrate how the objective will be met. Content should be selected based on the most current available evidence. Documentation should support quality of evidence chosen for content. Examples include but are not limited to evidence-based practice, literature/peer-reviewed journals, clinical guidelines, best practices, and content experts/expert opinion.

**Time Frame:** Identify the time needed to complete each objective in minutes, rather than in time lapse format i.e. 9:30 – 10:30 a.m. Evaluation is considered part of the learning process and should be included in the calculation of contact hours. List the number of minutes devoted to evaluation time on the educational planning tool along with the method of evaluation used.

**References:** References are the resources that were used to develop the presentation(s) within the activity i.e. bibliography, resource list, etc. Identify what evidence-based, valid, reliable sources were used to develop the content for this CNE activity.

**Awarding Contact Hours:** Specify the number of contact hours being requested. Contact hours must be determined in a logical and defensible manner, consistent with the objectives, content, teaching/learning strategies and target audience. Contact hours are awarded to participants for those portions of the educational activity devoted to the learning experience and time spent evaluating the activity. One contact hour = 60 minutes. Activities must last a minimum of 60 minutes. After the first contact hour, fractions or portions of the 60-minute hour should be calculated. For example, 150 minutes of learning experience equals 2.5 contact hours. Time allowed for introductions, breaks and meals should be excluded.

If rounding is desired in the calculation of contact hours, the provider must round down to the nearest 1/10th or 1/100th (e.g., 2.758 should be 2.75 or 2.7, not 2.8). Educational activities may also be conducted “asynchronously” and contact hours awarded at the conclusion of the activities. Time frames must match and support the contact hour calculation for live activities. For enduring materials, print, electronic, Web-based, etc., the method for calculating
the contact hours must be identified. The method may include but is not limited to a pilot study, historical data, or complexity of content.

Contact hours may not be awarded retroactively except in the case of a pilot study. Participants in a pilot study assist in determining the length of time required for completing an educational activity in order to calculate the number of contact hours to award. Those participants may be awarded contact hours once the number is determined.

**Pharmacology Hours for Advanced Practice Nurses:** If the activity is designed specifically for advanced practice nurses and the content addresses pharmacotherapeutics, the Nurse Planner must delineate the amount of time spent on pharmacotherapeutic content on the educational planning tool. The certificate of completion would then include the total number of contact hours the participant received and the appropriate number of pharmacology hours i.e. Sally Smith received 8 contact hours (2 of which were in the area of pharmacology).

**Evaluation:** A clearly defined method that includes learner input is used to evaluate the effectiveness of each educational activity. The Planning Committee must determine the method(s) of evaluation to be used. The evaluation components and method of evaluation should be relative to the desired outcome of the educational activity. Approved Providers must consider the effectiveness of their educational activities in a broader context than learner satisfaction alone. If the end result of continuing nursing education is “improved nursing practice and patient outcomes,” the provider is challenged to think about demonstrating those outcomes in the evaluation methods used. Evaluations may include both short- and long-term methods, as illustrated below.

**Evaluation Methods:**

**Short-Term**
- Evaluation form with questions related to individual activity objectives. For example:
  - Effectiveness of speakers
  - Anticipated change in practice
- Active participation in learning activity
- Post-test
- Return demonstration
- Case study analysis
- Role-play

**Long-Term**
- Longitudinal study with self-reported change in practice
- Data collection related to quality outcome measures
- Observation of Performance

A variety of evaluation methods can be utilized: written evaluation forms, rap sessions or discussions, performance checklists, or normed tests such as national achievement tests. Most often, provider-developed written evaluation forms are used. The new criteria give activity providers a great deal of flexibility in designing evaluation tools and methods.

The evaluation process helps to determine the effectiveness of the educational activity, including the teaching methodology and the value of the activity to the participant. In the continuing educational activity, evaluation is important since it can help to validate that learning has taken place. Besides assessing the effectiveness of the offering, evaluation can point out areas for corrective action or provide suggestions for future educational activities.

Evaluation summaries are to be submitted to MONA within thirty (30) days of implementation of the activity. For activities offered multiple times, the Nurse Planner must determine a time frame in which the activity’s evaluation data is compiled, reviewed and then subsequently submitted to MONA.

**Approval Statement:** The official approval statement must be included on all communications, marketing materials and other documents related to the educational activity, including but not limited to, promotional materials, brochures, flyers, correspondence, certificates and websites. The approval statement must be displayed clearly to the learner, stand alone on its own line of text, and be written exactly as indicated by MONA.
If advertising is released prior to approval AND after an application has been submitted to MONA, the following statement may be used:

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

*For more information regarding contact hours, please call (Insert applicant’s contact person’s name and phone number).*

If advertising is to be released after approval is received, then use the following statement:

*This continuing nursing education activity was approved by the Missouri Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.*

**DOCUMENTATION OF COMPLETION:** A document or certificate of completion is awarded to a participant who successfully completes the requirements for the individual education activity. The document or certificate must include:

- Title and date of the educational activity
- Name and address of the provider of the educational activity (*Web address acceptable*)
- Number of contact hours awarded
- Official approval statement
- Participant name

While not required, it is suggested that the certificate include the signature of the Nurse Planner responsible for the educational activity to demonstrate credibility and authenticity.

Applicants should prepare and submit a sample certificate of completion, as it would appear following approval and containing the official approval statement. The approval statement communicates to participants, employers, and certifying groups that the provider of the educational activity has demonstrated adherence to professional standards. It may seem awkward or presumptuous as approval has not yet been issued for the individual activity; however, the Nurse Peer Reviewers need to see how the certificate will be laid out i.e. designed, once approval is issued and that the required elements have all been included.

**COMMERCIAL SUPPORT & SPONSORSHIP:** The Activity Provider must adhere to the American Nurses Credentialing Center’s *Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities* at all times. The Activity Provider must have a written policy or procedure that includes a signed, written agreement when commercial support or sponsorship is received. Organizations providing commercial support or sponsorship may not provide or co-provide educational activities.

A commercial interest, as defined by ANCC, is any entity producing, marketing, reselling, or distributing healthcare goods or services consumed by or used on patients, or an entity that is owned or controlled by an entity that produces, markets, resells, or distributes healthcare goods or services consumed by or used on patients. Exceptions are made for nonprofit or government organizations, non-healthcare-related companies and healthcare facilities.

- **Commercial support** is financial or in-kind contributions given by a commercial interest that are used to pay for all or part of the costs of a CNE activity.
- **Sponsorship** is financial or in-kind contributions from an organization that does not fit the category of a commercial interest and that are used to pay for all or part of the costs of a CNE activity.

Content integrity of the educational activity must be maintained in the presence of commercial support or sponsorship. The provider developing the educational activity is responsible for ensuring content integrity. Providers developing educational activities must develop written policies and/or procedures for managing commercial support and/or sponsorship if the provider accepts commercial support or sponsorship. Written policies and/or procedures related to managing commercial support and sponsorship must address the following: Template of an agreement to be used for commercial support (Commercial Support Agreement) or Sponsorship (Sponsorship Agreement). The agreement must include:
1. Statement that the provider of commercial support or sponsorship may not participate in any component of the planning process of an educational activity, including:
   - Assessment of learning needs
   - Determination of objectives
   - Selection or development of content
   - Selection of faculty/presenters/authors
   - Selection of teaching/learning strategies
   - Evaluation
2. Statement of understanding that the commercial support or sponsorship will be disclosed to the participants of the educational activity
3. Statement of understanding that the provider of commercial support or sponsorship must agree to abide by the provider’s policies/procedures
4. Amount of commercial support or sponsorship and description of in-kind donation
5. Name and signature of the individual who is legally authorized to enter into contracts on behalf of the provider of commercial support or sponsorship
6. Name and signature of the individual who is legally authorized to enter into contracts on behalf of the provider of the educational activity
7. Date the agreement was signed
8. Method of documenting how commercial support or sponsorship was used for the educational activity or activities

**CONFLICTS OF INTEREST EVALUATION & RESOLUTION:** The Nurse Planner is responsible for evaluating the presence or absence of conflicts of interest and resolving any identified actual or potential conflicts of interest during the planning and implementation phases of an educational activity. The potential for conflicts of interest exists when an individual has the ability to control or influence the content of an educational activity and has a financial relationship with a commercial interest, the products or services of which are pertinent to the content of the educational activity.

The Nurse Planner is also responsible for ensuring that all individuals who have the ability to control or influence the content of an educational activity disclose all relevant relationships with any commercial interest, including but not limited to members of the Planning Committee, speakers, faculty/presenters/authors, and/or content reviewers. Relevant relationships must be disclosed to the learners during the time when the relationship is in effect and for 12 months afterward. All information disclosed must be shared with the participants/learners prior to the start of the educational activity.

**Relevant relationships,** as defined by ANCC, are relationships with a commercial interest if the products or services of the commercial interest are related to the content of the educational activity. Relationships with any commercial interest of the individual’s spouse/partner may be relevant relationships and must be reported, evaluated, and resolved. Evidence of a relevant relationship with a commercial interest may include but is not limited to 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 benefit directly or indirectly from the commercial interest. Financial benefits may be associated with employment, management positions, independent contractor relationships, other contractual relationships, consulting, speaking, teaching, membership on an advisory committee or review panel, board membership, and other activities from which remuneration is received or expected from the commercial interest.

Providers must be proactive and take precautions to prevent bias in the presentation of educational activities, and to protect learners from commercial messages. For a detailed statement of do’s and don’ts, see the complete standards. Some examples of precautions are:

- Physically separate the area where learners check in and receive educational materials, and the areas where they may choose or not choose to pick up commercial handouts and "goodies"- tote bags, pens, key chains, etc. with commercial product names and advertisements.
• Arrange space so that learners are not compelled to walk through an exhibit area on their way to the educational session/s; if refreshments are provided in the same room as the educational activity, and a commercial sponsor is providing them, the sponsor's name and product advertisements may not be placed in the room. The sponsor is to be acknowledged in the brochure, participant materials, by verbal announcement, and/or through other signage.
• Presenters who are affiliated with commercial entities are not permitted to use handouts that have commercial logos or advertisements on them, or to have such logos on their slides.

The Nurse Planner is responsible for evaluating whether any relationship with a commercial interest is considered relevant to the content of the educational activity. Disclosures may be categorized in the following ways:
• No relevant relationship with a commercial interest exists. No resolution required.
• Relevant relationship with a commercial interest exists. The relevant relationship with the commercial interest is evaluated by the Nurse Planner and determined not to be pertinent to the content of the educational activity. No resolution required.
• Relevant relationship with a commercial interest exists. The relevant relationship is evaluated by the Nurse Planner and determined to be pertinent to the content of the educational activity. Resolution is required.

The Activity Provider must describe the process used to resolve any actual or potential conflicts of interest identified during the planning of the activity. Actions taken to resolve conflicts of interest must demonstrate resolution of the identified conflicts of interest prior to presenting/providing the educational activity to learners. Such actions must be documented and the documentation must demonstrate (1) the identified conflict and (2) how the conflict was resolved. Actions may include but are not limited to the following:
• Removing the individual with conflicts of interest from participating in all parts of the educational activity.
• Revising the role of the individual with conflicts of interest so that the relationship is no longer relevant to the educational activity.
• Not awarding continuing education contact hours for a portion or all of the educational activity.
• Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicator of integrity, and absence of bias, AND monitoring the educational activity to evaluate for commercial bias in the presentation.
• Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicator of integrity, and absence of bias, AND reviewing participant feedback to evaluate for commercial bias in the activity.

The provider may use the services of planners and faculty/presenters/authors that have a financial interest in a commercial entity, but they must address the conflict of interest and describe how it is resolved. One way of resolving the conflict required by ANCC/MONA Accreditation Program criteria is full disclosure to activity participants that the conflict exists. Another example is the active role of the Nurse Planner(s) in ensuring that content is unbiased: for example, if faculty/presenters/authors mention one company's drug trade name, they should also mention similar drugs made by other companies when, applicable.

**Conflict of Interest Decision Tree:** Conflict of Interest is considered an affiliation or relationship with a Commercial Interest Organization of a financial nature that might bias a person's ability to objectively participate in the planning, implementation, or review of a learning activity. All planners, reviewers, faculty, presenters, authors, and content reviewers are required to complete Biographical/Conflict of Interest forms.
Resolutions may include but are not limited to the following:

- Removing the individual with conflicts of interest from participating in all parts of the educational activity
- Revising the role of the individual with conflicts of interest so that the relationship is no longer relevant to the educational activity.
- Not awarding continuing education contact hours for a portion or all of the educational activity.
- Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicator of integrity, and absence of bias, AND monitoring the educational activity to evaluate for commercial bias in the presentation.
- Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicator of integrity, and absence of bias, AND reviewing participant feedback to evaluate for commercial bias in the activity.

**Disclosures Provided to Participants:** Learners must receive disclosure of required items prior to the start of an educational activity. In live activities, disclosures must be made to the learner prior to initiation of the educational content. In enduring print materials or Web-based activities, disclosures must be visible to the learner prior to the start of the educational content. Required disclosures may not occur or be located at the end of an educational activity. Evidence of the disclosures to the learner must be retained in the activity file. If a disclosure is provided verbally, an audience member must document both the type of disclosure and the inclusion of all required disclosure elements.

Disclosures **always** required include:

- Notice of requirements for successful completion of the educational activity
Learners are informed of the purpose and/or objectives of the learning activity and the criteria that will be used to determine successful completion, which may include but are not limited to:

- Required attendance time at activity (e.g., 100% of activity, or miss no more than 10 minutes of activity)
- Successful completion of post-test (e.g., attendee must score X% or higher)
- Completed evaluation form
- Return demonstration

➢ Presence or absence of conflicts of interest for planners, presenters, faculty, authors, and content reviewers

Any influencing relationships, or lack thereof, of planners, presenters, faculty, authors, or content reviewers in relation to the educational activity must be disclosed. Individuals must disclose:

- Name of individual
- Name of commercial interest
- Nature of the relationship the individual has with the commercial interest

Disclosures required, if applicable, include:

➢ Commercial support:
Learners must be informed if a commercial interest has provided financial or in-kind support for the educational activity.

➢ Sponsorship:
Learners must be informed if an entity has provided financial or in-kind support for the educational activity.

➢ Non-endorsement of products:
Learners must be informed that accredited status does not imply endorsement by the provider of the educational activity or ANCC of any commercial products discussed/displayed in conjunction with the educational activity.

➢ Expiration of enduring materials:
Educational activities provided through an enduring format (e.g., print, electronic, Web-based) are required to include an expiration date documenting how long 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 but cannot exceed 3 years. ANCC requires review of each enduring material at least once every 3 years, or more frequently if indicated by new developments in the field specific to the enduring material. Upon review of enduring material for accuracy and current information, a new expiration date is established.

Disclosure can be accomplished by including the requirements within the promotional materials developed for the activity or identifying the requirements in the announcements or handouts prior to or at the beginning of the program. Some providers include in each participant packet, “Administrative information” or a “General Information Form”, and may include the required information on such a form. If that is true the provider must include a copy of the form used. Whatever the method used, the participant should be informed of the criteria either prior to or at the start of the educational activity. Disclosures may not occur or be located at the end of an educational activity.

CO-PROVIDING CNE ACTIVITIES: Individual Activity applicants may co-provide educational activities with other organizations. The co-providing organization may not be a commercial interest or sponsor. The Individual Activity applicant’s Nurse Planner must be on the Planning Committee and is responsible for ensuring adherence to the ANCC/MONA Accreditation criteria. The Individual Activity applicant is referred to as the provider of the educational activity. The other organization(s) is referred to as the co-provider(s) of the educational activity.

The activity provider’s Nurse Planner is responsible for: (1) ensuring that the activity provider/applicant’s name is prominently displayed in all marketing material(s) and certificate, and (2) developing a co-provider agreement, signed by an authorized representative of the co-provider that includes the following elements:

- Name of Individual Activity Provider
- The name(s) of the organization(s) acting as the co-provider(s)
• Statement of responsibility of the activity provider, including the activity provider’s responsibility for:
  o Determining educational objectives and content
  o Selecting planners, faculty/presenters/authors, and content reviewers
  o Awarding of contact hours
  o Recordkeeping procedures
  o Developing evaluation methods
  o Managing commercial support and/or sponsorship
  o Name and signature of the individual legally authorized to enter into contracts on behalf of the provider
  o Name and signature of the individual legally authorized to enter into contracts on behalf of the co-provider(s)
  o Date the agreement was signed

Co-providership refers to the planning, developing and implementing of an educational activity by two or more individuals, organizations, or agencies. A co-provider agreement ensures that the appropriate provider maintains primary responsibility for the CNE activity. Co-providership may be appropriate for some agencies. For example, a MONA district and a local specialty group may want to plan and offer programs that would meet the needs of both populations of nurses served by the organizations. It is critical that the provider receiving CNE approval assumes primary responsibility for the educational activity.

The Individual Activity applicant maintains responsibility for a) determination of objectives and content b) selection of faculty/presenters/authors and content reviewers c) awarding of content hours d) recordkeeping procedures e) developing evaluation methods and (f) managing commercial support or sponsorship. A written co-provider agreement confirms these arrangements. It is important that these areas be agreed on by the co-providers prior to presenting the CNE activity. Misunderstandings and confusion related to the responsibilities of the providers can be avoided if they are clearly delineated ahead of time.

**RECORD KEEPING:** Activity Provider applicants must develop and describe a record keeping system that ensures confidentiality, safety, and consistency with record collection. The Activity Provider should:

• Identify who is responsible for ensuring that each record is complete
• What record checklists or other tools are used to ensure record completeness
• Describe how records, including records of activities and participant records, are maintained for the required six year period
• Describe how and where the records are stored
• Describe how confidentiality and security of records is maintained
• Describe how records can be retrieved by participants requiring duplicate verification.

List each of the records that you will be maintaining. A phrase such as “all records will be maintained” does not show adherence to the individual records that are required to be maintained. You must list each one. The Activity Provider is able to determine within its own setting how confidential records are maintained and handled and which personnel have access to the records. Mechanisms should be in place for systematic, easy retrieval of information by authorized individuals.

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