Statement of Philosophy on Continuing Nursing Education

Nurses must continually update their knowledge and skills to promote and improve health care. As professionals, nurses make a commitment to continuing education as a lifelong process. The Tennessee Nurses Association (TNA) endorses the concept of planned continuing education for all nurses as one means by which nurses can maintain competence, meet the standards of practice developed by the profession, advance the discipline of nursing and facilitate professional growth.

Quality continuing education prepares the nurse to meet the challenge of rapid changes in knowledge, technology, and societal needs. We believe the Nursing Professional Development: Scope and Standards of Practice (ANA, 2010) guides the continuing education process for learners, educators and the Approver Unit.

TNA is committed to enhancing CNE through accreditation as an approver by ANCC Commission on Accreditation

TNA Approver Unit’s Purposes:
1. To approve individual activities and provider applications according to the ANCC Commission on Accreditation criteria.
2. To set policy within the guidelines of the ANCC Commission on Accreditation and the Tennessee Nurses Association Board of Directors.
3. To monitor the quality and consistency of the Approver Unit program.
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Chapter 1 – Approved Provider Unit Process

Tennessee Nurses Association recognizes and thanks the Ohio Nurses Association for their help in developing this manual. Information used by permission from Ohio Nurses Association.

Introduction

This manual includes information about operation of an approved provider unit for continuing nursing education. An approved provider unit has the authority to plan, implement, and evaluate its own continuing education activities during the three-year period of provider unit approval. Criteria of the American Nurses Credentialing Center’s (ANCC) Commission on Accreditation (COA) form the basis of the manual and its associated forms. The Committee on Continuing Education Review (CCER) of the Tennessee Nurses Association (TNA) is responsible for approving provider units.

Our goal is to help you be successful in completing the provider application and providing quality continuing education. Please contact the Education Administrator at TNA at 615-254-0350 at any time if you have questions or need further information.

Definitions

Continuing nursing education (CNE) in nursing consists of planned, organized learning experiences designed to improve the knowledge, skills and attitudes of nurses. It enhances nursing practice, education, theory development, research and administration. The outcome of continuing education should be to improve the health of the public and nurses’ pursuit of their professional career goals.

Personal development activities are learning experiences designed to enhance personal knowledge of the learner. Examples may include courses on topics like personal finance or retirement planning. Personal development activities are NOT eligible for contact hours.

TNA’s Authority as an Approver

The Tennessee Nurses Association is accredited as an approver of continuing nursing education by the American Nurses Credentialing Center’s Commission on Accreditation.

The Commission on Accreditation accredits approver units which have demonstrated the capacity to approve and monitor the educational activities of individual activity providers and provider units. Accreditation is international in scope.

CNE Chart for TNA’s Approver Unit

```
ANCC  (Accredits Approvers)
   /\                                    
TNA   (Approves Providers)               
   /\                                    
Approved Provider Unit  (Provides CNE)  
```

Difference between Providing and Approving

TNA is authorized through national accreditation to be an approver of continuing nursing education. Your organization, upon achieving approval as a provider unit, is authorized to assess, plan, implement, and evaluate continuing education activities according to the criteria and rules and award contact hours for those activities. **Provider units provide continuing education activities. They never approve their own or anyone else’s CNE activities.** The words “approved,” “application,” or “applicant” should never be used in connection with any activity your provider unit plans and presents.
Who Can Be a Provider Unit?

A. In order to be eligible, your provider unit must:

1. Have a clearly defined unit or department administratively and operationally responsible for continuing nursing education
2. Have Nurse Planner(s) who meet(s) qualifications of:
   a. Minimum of BSN
   b. Knowledge of adult learning and ANCC Accreditation criteria (see Note 1 below)
3. Have been functioning for at least six months, using accreditation criteria. During that time, at least three separate activities must have been planned, approved by TNA, implemented, and evaluated with direct involvement of a qualified nurse planner. Each activity must be at least 60 minutes in length. Jointly-provided activities are not acceptable. After this requirement has been completed, you may submit an “Intent to Apply as a Provider Unit” form, presuming that all other eligibility criteria have been met.
4. Target audience:
   a. If you are based in Tennessee, you must target more than 50% of your learning activities to nurses within the states of Tennessee, Kentucky, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, or contiguous to our region: Louisiana, Arkansas, Missouri, Illinois, Indiana, Ohio, West Virginia, and/or Virginia. (See Note 2 below)
   b. If your provider unit is based outside of Tennessee, you must target more than 50% of your learning activities to nurses within the geographic range of your provider unit. Check [www.hhs.gov/about/regionmap.html](http://www.hhs.gov/about/regionmap.html) for the identification of your region plus the states contiguous to your region.
5. Be separate from any commercial entity that produces, markets, re-sells or distributes a product used on or by patients. (See Note 3 below)

B. Verifying Eligibility

Eligibility forms are found on the TNA website under Approved Provider - Forms. ([www.tnaonline.org](http://www.tnaonline.org). Click on Continuing Education, and click on approved provider) For first time provider applicants, review Intent to Apply as a Provider Unit – Initial Application. For currently approved provider units, review the Intent to Re-apply as a Provider Unit – Currently Approved Provider. Reviewing the applicable form will help you determine if your organization is eligible to be a provider unit. This form must be submitted to and reviewed by the Education Administrator prior to submitting a provider application. Please contact Education Administrator with any questions about this process.

Note 1

Additional Information about Nurse Planner. The Nurse Planner must be a currently licensed registered nurse with a minimum of a baccalaureate degree in nursing. In some organizations there may be more than one Nurse Planner. One Nurse Planner should then be selected/identified as the Primary Nurse Planner. All Nurse Planners must meet the educational criteria of a minimum of a baccalaureate degree in nursing. Nurse Planners may work for the Provider Unit as staff members, consultants or volunteers.

In addition to meeting the minimum educational requirement, Nurse Planners must maintain expertise in educational design and adult learning theories, receive orientation to, and maintain responsibility for implementing criteria and rules in their performance of the nurse planner role. The essence of the Nurse Planner requirement is twofold:

- To ensure that a qualified Nurse Planner is involved in the entire process of delivery – from needs assessment through planning, implementation, evaluation and follow-up – for every continuing nursing education activity offered by the provider unit; and
To guarantee that ANCC Accreditation Program criteria guide the development and implementation of every continuing nursing education activity offered by a provider unit.

Other nurses may serve on an individual activity planning committee along with one of the Nurse Planners. These other nurses do not have the same responsibilities, accountabilities or educational requirements as the Nurse Planners. They are only responsible for participating in the planning of one particular educational event. (2015 ANCC Primary Accreditation Application Manual)

**Note 2**
If your target audience is broader than the areas identified above in #4, you are not eligible to apply to be an Approved Provider Unit through TNA. Please contact the ANCC Accreditation Program to apply for accreditation as a provider unit.

Activities offered over the internet are usually considered to be targeted to nurses in multiple regions covering more states than listed in item A-4a.

If you offer activities over the internet and they are targeted to an area outside the geographical region listed in item A-4a, then you need to apply to ANCC Accreditation Program as an accredited provider unit.

**Note 3**
Your organization is ineligible for approval as a provider unit if it is a commercial interest as defined in the Standards for Commercial Support in Appendix H, p. 61. A “commercial interest” is any entity producing, marketing, re-selling 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, re-sells or distributes healthcare goods or services consumed by, or used on, patients. This definition allows a provider to have a “sister company” that is a commercial interest, as long as the Approved Provider Unit had and maintained adequate corporate firewalls to prohibit any influence or control by the “sister company” over the continuing education program of the Approved Provider Unit. In this case TNA would expect that the Approved Provider Unit would have an adequate corporate firewall in place to prohibit any influence or control by the “sister company” over the continuing education program. Relevant relationships are defined as “relationships with a commercial interest if the products or services of the commercial interest are related the content of the educational activity Examples include but are not limited to:

- receiving a salary,
- royalty intellectual property rights,
- consulting for honoraria,
- ownership interest ( stocks and stock options, excluding diversified mutual funds)
- grants,
- contracts or
- other financial benefit directly or indirectly from the commercial interest.”

(2015 ANCC Accreditation Manual)

**Application and Related Policies and Processes**

**A. Application Process**

**For individuals interested in first time approval as a provider unit:**
Review the eligibility criteria as listed above. If you feel that you meet these criteria, submit the form "Intent to Apply as a Provider Unit - Initial Application" as found on the web site (www.tnaonline.org, click on Continuing Education, and click on approved provider - forms). Submit this form to the Education Administrator at TNA at least 3 months prior to when you plan to submit the provider application.
Once the Education Administrator notifies you that you are eligible, prepare and submit the provider application. Applications are accepted at any time of the year.

Step 1
For currently Approved Provider Units through TNA:
Submit the form "Intent to Re-apply as a Provider Unit - Currently Approved Provider Unit" as soon as you receive the reminder notice (sent six months prior to your expiration date). (You can find it posted on the TNA website under Forms—Approved Provider).

To ensure continuity of your provider unit's activities, submit the provider application at least three months before your current provider approval expires. All criteria must be met before approval is granted. **If approval expires, your provider unit may not award contact hours.**

Step 2
Submit three complete typed copies of the provider unit application packet and the application fee. Each copy of the application must include a table of contents (use application check list for index) and have pages clearly numbered consistent with the table of contents. THE PAGES NEED TO BE COLLATED. Bind your application securely. Comb binding or spiral binding is recommended. **Please do not use large 3-ring binders, rubber bands, staples or clips.**

To be accepted for review, all applications MUST be submitted on current TNA forms and completed in the format defined in this manual. Applications not submitted on correct forms or in the proper format will be returned with directions about what changes are needed before the review can take place.

Step 3
Provider applications are reviewed by 2 reviewers.

**B. Review Process**

Step 1
You will be notified by email that your application has been received at TNA. A preliminary review will be conducted, and you will be advised that the application is complete or that additional information is needed. If you are a first-time provider, you will be assigned an application number. This application number is very important and MUST be included on any subsequent correspondence or additional material related to your provider application. Once you have been approved as a provider, this application number becomes your provider number. For currently approved providers seeking re-approval please be sure your provider number is on all correspondence or other material related to your provider application.

Step 2
Your provider application is sent to two members of the Committee on CNE Review committee for review. Reviewers independently assess your provider application and prepare comments for discussion or need for additional information.

Step 3
The two reviewers who have assessed your provider application discuss their findings with the Education Administrator-Nurse Peer Review Leader and take action as noted below. If further information is needed, a specific due date will be set for return of the specified information. The CCER is committed to a 45 day turnaround time once application is received in the TNA office.

Step 4
One copy of your entire application, all correspondence to and from you related to the application, the CCER review forms, and action on your application are kept on file at TNA for six years. Only authorized personnel have access to the files. Accreditation bodies such as the ANCC Accreditation Program may review files.
As you proceed through the approval process, help is available. Phone calls or email to the TNA staff are encouraged. Consultation can be arranged. The goal is for you to be successful at providing quality continuing education.

C. **Types of action taken by Continuing Education Review Committee (CERC)**

There are four types of action possible on an application for provider unit approval.

1. **Approval** for three years occurs when your written application materials indicate that the criteria and rules are met.

2. **Decision Deferred Pending** receipt of additional information occurs when there is insufficient information provided to complete the review and approval process. If information is not received in time for a decision to be made prior to an approved provider unit’s expiration date, the provider unit will be required to discontinue awarding contact hours for CNE activities until provider unit approval is received.

3. **Provisional Approval** occurs when your written application materials indicate limitations in meeting criteria that are expected to be resolved within six months or less. You will be required to submit a written progress report. After review of the progress report, the CCER can confer approval for the remainder of the three year approval period or deny approval.

4. **Denial of Approval** occurs when written application materials indicate that your provider unit:
   a. Is not in adherence with the criteria of the ANCC Accreditation Program and/or requirements of the TNA approval process and will not be able to adhere within an identified period of time; or
   b. Has not demonstrated adherence to or improvement in relation to CCER documented areas of concern on the provisional approval progress report.

D. **Approval of Individual Activities during the Initial Application Process**

If a first time applicant wishes to award contact hours for an activity while the initial provider application is in process, individual CE applications must be submitted to TNA following the appropriate criteria and accompanied by the required application fee.

E. **Withdrawal and Resubmission of an Application**

A provider unit applicant has the right to withdraw an application at any time prior to completion of the approval process without prejudice to any future applications. The provider unit applicant must notify TNA in writing of the decision to withdraw the application.

1. The application and fee (less administrative fee) will be returned if request is made prior to the beginning of the review process. Fees will not be refunded if the review process has begun.

2. The application may be resubmitted at a later date, with appropriate documentation and required fee. The application will be processed as a new application.

F. **Length of Approval**

The maximum approval period for provider units is three years. During the approval period, the provider unit is authorized to award contact hours for CNE activities without submitting documentation forms for individual activities to TNA. However, the TNA criteria must be met by the provider unit for each individual CNE activity. Documentation of meeting the criteria must be done on the CNE planning documentation form (same as application form) found on the TNA website.

G. **Suspension and Revocation of Approval**

Approval may be suspended and/or revoked from an approved provider unit as a result of ANY one of the following:

1. Failure to remain in adherence with relevant criteria, rules and requirements defined in this manual;
2. Investigation and verification by the CCER of written complaints or charges by consumers or others;
3. Refusal to comply with an investigation by the CCER;
5. Failure to submit required information such as the annual survey or follow-up information.

Suspension and revocation are effective on the date the letter of notification is received by the organization. In cases of suspension, the provider unit may not award contact hours until all conditions relative to the suspension have been met. In cases of revocation, all statements regarding provider unit approval status must be removed from publicity material and certificates of attendance printed and/or distributed after that date. If provider unit status is revoked, the provider unit may not award contact hours.

H. Reconsideration and Appeal
If your organization does not agree with the CCER decision of suspension, revocation or denial, you may appeal the decision in writing within ten business days of the date the notification is sent. Applicants may not appeal eligibility requirements, criteria or rules upon which the Approver Unit program is based, the scoring rubric, the setting of passing scores, or the reviewers’ conclusions regarding the evaluation of the applicant’s written documentation.

The applicant must submit an appeal in writing within ten business days of the notification of the adverse decision being sent. The appeal must briefly state the reason(s) the applicant contests the decision. For further information about the appeal process, please contact the Education Administrator- Nurse Peer Review Leader at TNA.

I. Reporting of Data
Approved Provider Units will be asked to submit annual survey data and periodic monitoring requests. (An example of a monitoring request will be a review of an activity documentation file mid-approval cycle). Failure to respond to monitoring requests will result in suspension of approval as a Provider Unit.

J. Provider Unit Changes
The Approved Provider Unit must maintain communications with TNA during the period of approval. At a minimum the following must be reported:
1. Reports of data requested by TNA within the time frame specified when the data is requested.
2. Within 30 days, information about change in
   (a) Name, ownership or structure of the organization, or
   (b) The Nurse Planner(s) (including name, credentials and completed bio form), or
   (c) The name of the contact person.
3. Information about termination of Approved Provider Unit activities within 30 days of the decision to terminate. Once approval is terminated, the provider unit may no longer use statements concerning Approved Provider Unit status on publicity material or certificates of attendance and may not award contact hours.

What if These Things Happen Once Your Provider Unit is approved?

A. Major Changes in Learning Activities
If a learning activity has met the criteria and there is a significant change in the content, then another planning documentation form must be completed and reviewed by the Approved Provider Unit. For example, significant change could be substituting a new one hour segment for one that previously met criteria, changing objectives and content, etc.

If the speaker changes, but the new speaker will continue to present the same content, and use the same objectives and time frames, place a memo in the activity file regarding this change and include the biographical data form including conflict of interest statement for the new speaker.
If you have any questions about whether you should write another application form or just a memo, please contact the Education Administrator- Nurse Peer Review Leader at TNA.

B. **Repetition of Portions of Classes**
   If, during the planning process, it is identified that certain session(s) out of a larger presentation may potentially be repeated on their own, the provider unit should:
   1. Identify each section of the larger presentation as a potential, separate session (e.g. Session 1: Acute Respiratory Distress; Session 2: Chronic Respiratory Distress, etc.)
   2. Identify on the CNE documentation planning form (application form) that learners may attend one or more sessions. *(Just as a note: You might also wish to include the information on the advertising material.)*
   3. On the certificate, identify the sessions the learner attended, the date and the contact hours awarded for those sessions (e.g., “Learner name successfully completed Critical Care Course Sessions 1 Acute Respiratory Disease, 5 Congestive Heart Failure, & 7 MI on date.”).

C. **Refresher or Reactivation Courses**
   Contact hours may be awarded for refresher courses that provide nurses re-entering the job market with advanced knowledge or a new skill set required to function in the role as RN. Continuing education may be awarded for content provided through orientation; skills training, BLS, ACLS, PALS, or similar if the content addresses a gap in knowledge, skills, and/or practices for the target audience. *(2015 Accreditation Manual)*

D. **Keeping Up to Date**
   It is the responsibility of the Nurse Planners to stay up to date with the most current ANCC Accreditation criteria. You can do this by:
   1. Attending the Provider Workshops when presented by TNA. *(Note: Attendance is strongly encouraged as new criteria, new rules, interpretations, and other information will be provided.)*
   2. Reviewing the most current Provider Manual.
   3. Contacting the Education Administrator. Nurse Peer Review Leader at TNA with any questions.
   4. Primary Nurse Planners are responsible for incorporating all criteria and rules changes on the specified date within their provider units.

E. **Other Questions or Concerns?**
   If other issues arise that generate questions, please contact the Education Administrator-Nurse Peer Reviewer Leader at TNA at 615-254-0350.
Chapter 2 - Approved Providers
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This chapter outlines the application requirements for providers approved by the Tennessee Nurses Association to offer CNE, including the criteria for submitting the narrative component of the application and the application process.

The chapter is divided into several sections:
- Introduction
- Eligibility in general
- Applicant and Approved Provider Responsibilities
- Intent to Apply as a Provider Unit
- Provider Application
  - Organizational Overview (OO)
  - Approved Provider Criterion 1: Structural Capacity (SC)
  - Approved Provider Criterion 2: Educational Design Process (EDP)
  - Approved Provider Criterion 3: Quality Outcomes (QO)
  - Roles and Responsibilities
  - Attestation Statement
  - Individual Activity Files
- Submission of the Provider Application
- Mid Cycle Submission of an Individual Activity
- Annual Reporting
- Schedule/Timeline of Activities

Introduction
An Approved Provider is comprised of the members of the organization who support the delivery of continuing nursing education activities. The Provider Unit may be a single focused organization devoted to offering continuing nursing education activities or a separately identified unit within a larger organization. If the Provider Unit is within a larger organization, the larger organization is defined as a multi-focused organization (MFO). (For example, the Provider Unit may be placed within the Education Department of a hospital or school of nursing.)

The applicant applying for approval is the Provider Unit (PU). The MFO organization is not the applicant. Within a MFO organization, the Provider Unit structure must be identified with clear lines of authority and be clearly delineated for accountability and responsibility. Therefore, all criteria that pertain to the applicant are demonstrated by the functions of the Primary Nurse Planner, Nurse Planners (if applicable), Provider Units assess learners’ needs and plan, implement, and evaluate CNE activities according to Tennessee Nurses Association’s guidelines, which are based on ANCC accreditation criteria. Provider Units are responsible for developing individual education activities and awarding contact hours to nurses for use in fulfilling their own goals for professional development, licensure, and certification. Each educational activity is led by a Nurse Planner in collaboration with at least one other planner. Contact hours may not be awarded for CNE activities developed without the direct involvement of a Nurse Planner. Provider Units may jointly provide activities, but they may not approve activities.
To be eligible to apply for Approved Provider status, an organization must:

- Be one of the following:
  - State Nurses Association of the American Nurses Association
  - College or University
  - Healthcare Facility
  - Health-Related Organization
  - Multidisciplinary Educational Group
  - Professional Nursing Education Group
  - Specialty Nursing Organization

- Be administratively and operationally responsible for coordinating the entire process of planning, implementing, and delivering CNE

- Identify one Nurse Planner who will act as the Primary Nurse Planner and serve as the liaison between Tennessee Nurses Association and the Approved Provider Unit

- Have a Primary Nurse Planner who holds a current, valid license as an RN and a baccalaureate degree or higher in nursing

- Have a Primary Nurse Planner who has authority within the organization to ensure compliance with TNA’s guidelines in the provision of CNE

- Have a Primary Nurse Planner who is responsible for the orientation of all Nurse Planners and key personnel in the organization to TNA’s guidelines

- Ensure that all other Nurse Planners in the Approved Provider Unit hold current, valid licenses as RNs with a baccalaureate degree or higher in nursing

- Ensure that each CNE activity has a qualified Nurse Planner who is an active participant in the planning, implementing, and evaluation process

- Be operational for a minimum of six (6) months prior to application

- **Initial applicants** must have completed the process of assessment, planning, implementation, and evaluation for at least three separate educational activities provided at separate and distinct events:
  - With the direct involvement of a Nurse Planner
  - That adhered to TNA’s guidelines
  - That were each a minimum of one hour (60 minutes) in length
  - That were not jointly provided
  - That were approved by TNA and presented

- Not be a commercial interest as defined in the glossary and the American Nurses Credentialing Center’s Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities

- The target audience consists of a-majority (>50%) of nurses in their local geographic region (DHHS http://www.hhs.gov/about/regions) and its contiguous states. Applicants whose target audience is in multiple regions or in states that are not confined to a single region and its contiguous states, for more than 50% of its activities may not be an Approved Provider. Instead they must apply to ANCC as an Accredited Provider.

- Be in compliance with all applicable federal, state, and local laws and regulations that affect the organization’s ability to meet TNA’s guidelines

- Disclose previous denials, suspensions, and/or revocations
Applicant and Approved Provider Responsibilities

- Must be in compliance with all applicable federal, state, and local laws and regulations that affect the organization’s ability to meet TNA’s guidelines
- Must identify a Primary Nurse Planner who holds overall responsibility for Approved Provider Unit compliance with ANCC criteria
- Must identify a Primary Nurse Planner who is responsible for orienting Nurse Planners to TNA’s guidelines
- Must ensure that a Nurse Planner is an active participant in the planning, implementing, and evaluation of each educational activity
- Must ensure that Planning Committees have a minimum of a Nurse Planner and one other planner to plan each educational activity; the Nurse Planner is knowledgeable about the CNE process and is responsible for adherence to TNA’s guidelines; one planner needs to have appropriate subject matter expertise for the educational activity being offered
- Must ensure that biographical information of the Nurse Planner and content expert is maintained. Documentation of conflict of interest (COI) data must be maintained for each Planning Committee member, faculty, presenter and content reviewer.
- Must notify TNA in writing, within seven business days of the discovery or occurrence of the following:
  - Significant changes or events that impair their ability to meet or continue to meet Accreditation Program requirements or that make them ineligible for Approved Provider status
  - Loss of status as a state nurses association of the ANA
  - Any event that might result in adverse media coverage related to the delivery of CNE
  - Change in commercial interest status
- The Lead (Primary) Nurse Planner or designee must notify TNA, in writing and within 30 days, of any change within the Approved Provider organization, including but not limited to:
  - Changes that alter the information provided in the Approved Provider application, including change of address or name
  - A decision not to submit a provider application after the intent to apply is approved
  - Change in Primary Nurse Planner or suspension, lapse, revocation, or termination of the Primary Nurse Planner’s registered nursing license
  - Change in Nurse Planners or suspension, lapse, revocation, or termination of any of the Nurse Planners registered nursing licenses
  - Change in ownership
  - Indication of potential instability (e.g., labor strike, reduction in force, bankruptcy) that may impact the organization’s ability to function as an Approved Provider

Intent to Apply as a Provider Unit

Each organization who wishes to become an Approved Provider Unit or who wishes to apply again as a provider unit must first complete and submit an “intent to apply or re-apply” form. The Education Administrator will review your intent form and notify you if you are eligible to apply to TNA as a provider unit. Once you receive approval, you may begin working on the provider application. The Intent to Apply or Re-apply form should be submitted at least three months prior to submitting the provider application.
PART ONE of Provider Application

The following four sections are required written documentation for new Approved Provider Unit applicants and those organizations currently approved as provider units and reapplying to maintain their status:

- Organizational Overview (OO)
- Approved Provider Criterion 1: Structural Capacity (SC)
- Approved Provider Criterion 2: Educational Design Process (EDP)
- Approved Provider Criterion 3: Quality Outcomes (QO)

Note: All documents will be reviewed for adherence to Accreditation criteria and TNA’s guidelines at the time educational activities were planned, implemented, and evaluated.

Approved Provider Organizational Overview

The Organizational Overview (OO) is an essential component of the application process that provides a context for understanding the Approved Provider Unit/organization. The applicant must submit the following documents and/or narratives:

Structural Capacity

**OO1. Demographics**
- Submit a description of the features of the Approved Provider Unit, including but not limited to scope of services, size, geographical range, target audience(s), content areas, and the types of educational activities offered.
- If the Approved Provider Unit is part of a multi-focused organization, describe the relationship of these scope dimensions to the total organization.

**OO2. Lines of Authority and Administrative Support**
- Submit a list of the names, credentials, positions, and titles of the Lead (Primary) Nurse Planner, and other Nurse Planner(s) (if any), in the Approved Provider Unit.
- Submit position descriptions of the Lead (Primary) Nurse Planner, Nurse Planners (if any), in the Approved Provider Unit. Position descriptions should be specific to your role in the provider unit, not your “job description”, unless they are the same. See examples in the appendix.
- Submit an organizational chart, flowchart or similar image depicting the structure of the Approved Provider Unit, including the Lead (Primary) Nurse Planner, other Nurse Planner(s) (if any).
- If part of a larger organization, submit an organizational chart, flow sheet, or similar image that depicts the organizational structure and the Approved Provider Unit’s location within the organization.

Educational Design Process

**OO3. Data Collection and Reporting**

- Approved Provider organizations report data, at a minimum, annually to TNA:
  - Submit a complete list of all CNE offerings provided in the past 12 months, including activity dates; titles; target audience; total number of participants; number of contact hours offered for each activity, joint provider status; and any commercial support, including monetary or in-kind amount; Forms are available on ANCC Accreditation Web site: http://www.nursecredentialing.org/accrediation.aspx and the TNA website www.tnaonline.org
Each narrative must include a specific example that illustrates how the criterion is operationalized within the Provider Unit.
Approved Provider Criterion 1: Structural Capacity (SC)

The capacity of an Approved provider is demonstrated by commitment to, identification of, and responsiveness to learner needs; continual engagement in improving outcomes; accountability; and leadership.

Describe and, using an example, demonstrate:

SC 1. Commitment:
The Lead (Primary) Nurse Planner demonstrates commitment to ensuring learner needs are met by evaluating approved Provider Unit processes in response to data that may include, but not limited to, aggregate individual educational activity evaluation results, stakeholder feedback (staff, volunteers) and learner/customer feedback.

Note: This item relates to the overall functioning of the provider unit and the PNP’s commitment to learner needs, not specifically to the individual activity planning. Examples might include suggestions based from multiple requests; discussions to increase attendance opportunities at CNE events – done by offering more classes convenient to the night shift; offering podcasts; getting commercial support to be able to get national speakers, etc.

Questions to consider might include:

- How do you as the PNP use feedback from your learners to change or improve Provider Unit processes or learning activities?
- How do you know what your learners want?
- What do you do about it?

SC2. Accountability
How the Lead (Primary) Nurse Planner ensures that all Nurse Planners of the Approved Provider Unit are appropriately oriented/trained to implement and adhere to the ANCC accreditation criteria.

SC3. Leadership
The Primary (lead) Nurse Planner demonstrates leadership of the Approved Provider Unit through direction and guidance given to individuals involved in the process of assessing, implementation, and evaluating CNE activities in compliance with ANCC accreditation criteria.

Examples might include first we orient new Nurse Planners, then have them work with a preceptor, and then monitor their performance to ensure adhering to the criteria; sharing Provider Newsletters; becoming certified as a Nursing Professional Development Specialist; description of how keep up to date with the criteria and rules; etc.

Questions to consider might include:

- As the PNP, how do you orient new people to your Provider Unit?
- How do you keep them updated?
- How do you ensure they are doing the right things?
- How do you ensure that key personnel have the knowledge they need to function (e.g. secretaries, administrative assistants, IT personnel, content reviewers, etc.)?
Approved Provider Criterion 2: Educational Design Process (EDP)

The Approved Provider Unit has a clearly defined process for assessing needs as the basis for planning, implementing, and evaluating CNE. CNE activities are designed, planned, implemented, and evaluated in accordance with adult learning principles, professional education standards, and ethics.

Examples for the narrative component of the provider application (EDP 1-7) may be chosen from but are not limited to those contained in the submitted activity files. Evidence must demonstrate how the Approved Provider Unit complies with each criterion.

Assessment of learning needs

CNE activities are developed in response to, and with consideration for, the unique needs of the audience.

Describe and, using an example, demonstrate the following:

EDP 1 The process used to identify a problem in practice or an opportunity for improvement (Professional practice gap)

➢ Examples might include annual needs assessment, review of literature, QI data, review of summative evaluations, requests from learners or management, organizational initiatives, etc.

EDP 2 How the nurse planner identifies the underlying needs (knowledge, skills and/or practice(s) that contribute to the professional practice gap

Questions to consider might include:

➢ How do you use the data collected above to determine the gap in where the learners are now and where they should be. This gap is in knowledge, skills, attitude and/or practice. This gap will then be used to create an activity and determine your outcome.

➢ Remember: Addressing the gap should help to improve nursing practice and professional development

Planning

Planning for each educational activity must be independent from the influence of commercial interest organizations

Describe and, using an example, demonstrate the following:

EDP 3 The process used to identify and resolve, as applicable, all conflicts of interest for all individuals in a position to control educational content

Design Principles

The educational design process incorporates best-available evidence and appropriate teaching methods

Describe and, using an example, demonstrate the following:

EDP 4 How content of the educational activity is developed based on best-available current evidence to foster achievement of desired outcomes (e.g. clinical guidelines, peer-reviewed journals, experts in the field) and fosters achievement of desired outcomes

Note: Refer to the appendix on Conflict of Interest (COI) and the bio form
EDP 5 How strategies to promote learning and actively engage learners are incorporated into educational activities

Evaluation
A clearly defined method that includes learner input is used to evaluate the effectiveness of each educational activity. Results from the activity evaluation are used to guide future activities.

Describe and, using an example, demonstrate each of the following:

EDP 6 How summative evaluation data for an educational activity are used to guide future activities

EDP 7 How the Nurse Planner measured change in knowledge, skills, and/or practices of the target audience that occurred as a result of participating in the educational activity

Questions to consider might include:
➢ How do your objectives address the gap in knowledge, skills, attitude and/or practice?
➢ How do your objectives achieve your outcomes for any activity?
➢ How do you ensure that your objectives are measurable and learner centered?

Approved Provider Criterion 3: Quality Outcomes (QO)
The Approved Provider Unit engages in an ongoing evaluation process to analyze its overall effectiveness in fulfilling its goals and operational requirements to provide quality CNE.

Approved Provider Unit Evaluation Process

The Approved Provider Unit must evaluate the effectiveness of the overall functioning as an Approved Provider Unit.

Describe and, using an example, demonstrate the following:

QO1. The process utilized for evaluating effectiveness of the Approved Provider Unit in delivering quality CNE.

Questions to consider might include:
➢ What is your plan to evaluate effectiveness of the provider unit beyond evaluating individual activities?
➢ What is included when evaluating the effectiveness of the provider unit? What do you evaluate? How often are these components evaluated?
➢ How do you measure the effectiveness of the provider unit?

QO2. How the evaluation process for the Approved Provider Unit resulted in the development or improvement of an identified quality outcome measure. (Refer to identified quality outcomes list in OO4)

Question: What were the results of your internal evaluation process?

Value/Benefit to Nursing Professional Development
The Approved Provider Unit shall evaluate data to determine how the Approved Provider Unit, through the learning activities it has provided, has influenced the professional development of its nurse learners

QO3 How, over the past 12 months, the Approved Provider Unit has enhanced nursing professional development. (Refer to identified quality outcomes in OO4)
PART TWO of the Provider Application: Individual Activity Files

As a component of the educational design process, the Approved Provider Unit applicant should select and submit CNE activity files to TNA that have been planned within 12 months of the Approved Provider Unit application date and comply with ANCC criteria.

Note: For First Time Applicants Only: If you are a first time applicant for provider status, submit:

- Acknowledgement and approval letters from TNA for the 3 activities TNA has approved
- A copy of the FINAL certificate that was given to learners for each of these 3 activities
- A summative evaluation for each of these 3 activities
- Documentation for an activity that has been planned and will be presented after provider status has been achieved. Include the planning documentation form and all required attachments – i.e. agenda, Education Design form, bio data forms, marketing sample, certificate, evidence of disclosures to be made, and commercial support agreement if applicable. The marketing material and certificate should contain the provider statement that will be used by your organization once provider status has been achieved.
- The sample certificate that you will use once you become an approved provider unit. The provider statement must be included on the certificate.

(Your Name of Approved Provider Unit) is an approved provider of continuing nursing education by the Tennessee Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.

For Currently Approved Provider Units
Submit documentation for two sample activities. Each activity must be at least one hour in length. Include:

- Documentation form with all required attachments – bio forms, marketing sample, certificate, evidence of disclosures, co-provider agreement if applicable, commercial support/sponsorship agreement if applicable
- Summative evaluation

Each activity file must include evidence of:

Note: Most of the information listed here will be in the Individual Activities Documentation Form (application form).
- Title and location (if live) of activity
- Type of activity format: live or enduring
- Date live activity presented or, for ongoing enduring activities, date first offered and subsequent re-evaluation dates
- Description of the target audience
- Method of the needs assessment
- Findings of the needs assessment
- Names, titles, and expertise of activity planners
- Role held by each Planning Committee member (must include identification of the Nurse Planner and content expert(s))
- Names, titles, and expertise -Nurse Planner and Content Expert
- Conflict of interest disclosure statements from planners
- Resolution of conflicts of interest for planners, if applicable
- Conflict of interest disclosure statements from presenters, faculty, authors, and/or content reviewers
- Resolution of conflicts of interest for presenters, faculty, authors, and/or content reviewers, if applicable
- Purpose of activity
• Objectives of activity
• Evidence of gap in knowledge, skill, or practice for the target audience
• Content of activity: an Educational Planning Table (Objective, Content, Time Frame, Speaker and Teaching Strategy grid)
• Instructional strategies used
• Evidence of learner feedback mechanisms
• Rationale and criteria for judging successful completion
• Method or process used to verify participation of learners
• Number of contact hours awarded for activity, including method of calculation (Provider must keep a record of the number of contact hours earned by each participant)
• Template of evaluation tool(s) used
• Marketing and promotional materials
• Means of ensuring content integrity in the presence of commercial support (if applicable)
• Commercial support agreement with signature and date (if applicable)
• Evidence in writing of disclosing to the learner:
   Purpose and/or objectives and criteria for successful completion
   Presence or absence of conflicts of interest for all members of the Planning Committee, presenters, faculty, authors, and content reviewers
   Sponsorship or commercial support (if applicable)
   Expiration date (enduring materials only)
• Documentation of completion must include:
   Title and date of the educational activity
   Name and address of provider of the educational activity (web address acceptable)
   Number of contact hours awarded
   Approved Provider statement
   Participant name
• Summative evaluation (A summative evaluation is a listing of the raw data collected from the participants on the evaluation form.)
• List of participant names with unique identifier (Include a representative sample of data collected in activity file to be reviewed. The provider must maintain all participant data in a safe and secure manner.) The unique identifier could be employee number, birth date, home address, or other identifier.
• Division of responsibilities among co-providers (if applicable)
• Joint provider agreement with signature and date (if applicable)

**Roles and Responsibilities Each Provider Unit Must Follow:**

In preparation for becoming an Approved Provider Unit and throughout your approval, you must meet each of the roles and responsibilities listed below. Each activity file will be reviewed to ensure that this is occurring.

1. **Awarding Contact Hours**
   Contact hours are determined in a logical and defensible manner. 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. No fewer than 0.5 contact hours can be awarded for an educational activity. If rounding is desired in the calculation of contact hours, the provider must round down to the nearest 1/10th or 1/100th. Educational activities may also be conducted “asynchronously” and contact hours awarded at the conclusion of the activity.

   Contact hours may **not** be awarded retroactively *except* in the case of a pilot study.
Participants in the 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.

2. **Approved Provider Statement**

Prior to the start of every activity and on each certificate of completion that refer to the Provider’s Unit’s ANCC accredited status must contain the official accreditation statement.

*[Name of Approved Provider Unit] is an approved provider of continuing nursing education by the Tennessee Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.*

3. **Documentation of Completion**

Participants receive written verification of their successful completion of an activity, which includes, at a minimum:
- Title and date of the educational activity
- Name and address of provider of the educational activity (web address acceptable)
- Number of contact hours awarded
- Approved Provider statement
- Participant name

4. **Commercial Support**

The Provider Unit must adhere to the American Nurses Credentialing Center’s Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities at all times.

The Provider Unit must have a written policy or procedure and a signed, written agreement if commercial support accepted.

Organizations providing commercial support may **not** provide or jointly provide educational activities.

5. **Conflicts of Interest**

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. If the Nurse Planner has an actual or potential conflict of interest, he or she should excuse himself or herself from the role as Nurse Planner for the educational activity.

**Note:** Refer to Chapter 3: Educational Design Process, section titled *Conflicts of Interest.*

6. **Disclosure Responsibilities**

**Disclosures in the Planning Process:**

**Signed Conflict of Interest Disclosure Form.** All planners, presenters, faculty, authors, and content reviewers must disclose any conflicts of interest related to planning of an educational activity. Forms must be signed and dated. Disclosure must be relative to each educational activity. If a potential or actual conflict is identified, the planning process must include a mechanism for resolution.

**Disclosures provided to the Learner:**
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. All disclosures must be made in writing.

Disclosures always required include:

- **Notice of requirements for successful completion of the educational activity:** Prior to the start of an educational activity, learners must be informed of the purpose and/or objectives of the educational activity and the criteria 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 (i.e., attendee must score X% or higher)
  - Completed evaluation form
  - Return demonstration

- **Presence or absence of conflict 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.

  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.

- **Expiration of Enduring Material.** 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 three years. ANCC requires review of each enduring material at least once every three 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.

7. **Approved Provider Unit Recordkeeping**

The Approved Provider Unit is responsible for maintaining activity file records in a retrievable file (electronic or hard copy) accessible to authorized personnel for six years. The criteria delineated under the Provider Educational Design process must be followed consistently during the period of approval, and the recordkeeping files must include evidence in the form of:

- Title and location (if live) of activity
- Type of activity format: live or enduring (Independent Study)
- Date live activity presented or, for ongoing enduring activities, date first offered and subsequent re-evaluation dates
- Description of the target audience
- Method of the needs assessment
- Findings of the needs assessment
- Names, titles, and expertise of activity planners

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Revised June, 2013
• Role held by each Planning Committee member (must include identification of the Nurse Planner and content expert(s))
• Names, titles, and expertise of activity presenters, faculty, authors, and/or content reviewers
• Conflict of interest disclosure statements from planners
• Resolution of conflicts of interest for planners, if applicable
• Conflict of interest disclosure statements from presenters, faculty, authors, and/or content reviewers
• Resolution of conflicts of interest for presenters, faculty, authors, and/or content reviewers, if applicable
• Purpose of activity
• Objectives of activity
• Evidence of gap in knowledge, skill, or practice for the target audience
• Content of activity: an Educational Planning Table (Objective, Content, Time Frame, Speaker and Teaching Strategy grid)
• Instructional strategies used
• Evidence of learner feedback mechanisms
• Rationale and criteria for judging successful completion
• Method or process used to verify participation of learners
• Number of contact hours awarded for activity, including method of calculation (Provider must keep a record of the number of contact hours earned by each participant)
• Template of evaluation tool(s) used
• Marketing and promotional materials
• Means of ensuring content integrity in the presence of commercial support (if applicable)
• Commercial support agreement with signature and date (if applicable)
• Means of ensuring content integrity in the presence of sponsorship (if applicable)
• Evidence in writing of disclosing to the learner:
• Purpose and/or objectives and criteria for successful completion
• Presence or absence of conflicts of interest for all members of the Planning Committee, presenters, faculty, authors, and content reviewers
• Commercial support (if applicable)
• Expiration date (enduring materials only)
• Documentation of completion must include:
  ➢ Title and date of the educational activity
  ➢ Name and address of provider of the educational activity (web address acceptable)
  ➢ Number of contact hours awarded
  ➢ Approved Provider statement
  ➢ Participant name
• Summative evaluation (A summative evaluation is a listing of the raw data collected from the participants on the evaluation form).
• List of participant names with unique identifier (Include a representative sample of data collected in activity file to be reviewed. The provider must maintain all participant data in a safe and secure manner.) The unique identifier could be employee number, birth date, home address, or other identifier.)
• Division of responsibilities among joint providers (if applicable)
• Joint provider agreement with signature and date (if applicable)

Note: First-time applicants should prepare and submit a sample certificate of completion containing the Approved Provider statement to be used once approval is attained.
8. **Jointly Providing Activities for Continuing Nursing Education**

When an activity is jointly provided, the Approved Provider is referred to as the provider of the educational activity. The other organization(s) are referred to as the joint provider(s) of the educational activity. The jointly providing organization may not be a commercial interest or sponsor. The Approved Provider Unit’s Nurse Planner must be on the planning committee and is responsible for ensuring adherence to the ANCC accreditation criteria.

When an educational activity is jointly provided, the Provider Unit’s Nurse Planner is responsible for:

- Signed joint provider agreement
- Ensuring that the Approved Provider Unit name is prominently displayed in all marketing material and certificate
- The name(s) of the organizations acting as the joint provider(s)
- Statement of responsibility of the provider, including:
  - Determining educational objectives and content
  - Selecting planners, presenters faculty, authors, and content reviewers
  - Awarding of contact hours
  - Recordkeeping procedures
  - Developing evaluation methods
  - Managing commercial support or
- Name and signature of the individual legally authorized to enter into contracts on behalf of the Approved Provider Unit
- Name and signature of the individual legally authorized to enter into contracts on behalf of the joint provider(s)
- Date the agreement was signed

In the event that two or more organizations are Approved Providers, one will act as the provider of the educational activity and the other(s) will act as the joint provider(s). If collaborating providers are all approved, one is designated to retain the provider responsibilities by mutual, written agreement. The Approved Provider Unit designated to retain these responsibilities is referred to as the provider, and the other collaborating providers are referred to as joint providers.

9. **The Nurse Planner(s) of the Approved Provider Unit plans and provides CNE activities.** The Approved Provider Unit may not *approve* its own activities or the activities planned by outside entities.
Part Three of the Provider Application: Attestation Statement

The provider application will require a signed attestation statement from the Primary Nurse Planner which addresses the following responsibilities:

I attest that I will adhere to the following criteria of ANCC as defined in the TNA Provider Manual:

1. Awarding of contact hours
2. Use of the Approved Provider Statement
3. Certificate/documentation of completion
4. Disclosures
5. Recordkeeping
6. Joint providing
7. Adhering to laws/rules/ethical business practices
8. Educational requirements and responsibilities of the primary nurse planner and nurse planners
9. Timely communication about core changes and responses to requests for information from TNA
10. Process to ensure meeting of all criteria and rules

Submitting the Provider Application:

1. Before completing the provider application, be sure you have submitted your Intent to Apply as a Provider Unit (first time applicants) or Intent to Re-apply as a Provider Unit (currently approved provider units) to TNA and have received approval to continue and make sure you are using the most current application form.
2. Complete the narrative component of the provider application. It should be limited to 50 pages.
3. Include the attachments to the provider application as described throughout this chapter.
4. Number the pages sequentially. Collate all pages.
5. Include a table of content so that reviewers can easily find information.
6. Ensure that all pages are legible and that abbreviations are explained.
7. Bind the application securely. Comb binding is recommended for each copy of the complete application. Staples, rubber bands and paper clips are not acceptable. Do not use a ring binder.
8. Submit a total of three (3) copies along with the application fee to the Tennessee Nurses Association. Your fee is not refundable once the review process has begun. An administrative fee of $45.00 will be deducted if a refund is issued prior to the start of the review.
9. If you are applying again as a provider unit, be sure to submit the application by the due date (three months before expiration). Also be sure to include your provider number on all correspondence.

Mid Cycle Review

Half way into your provider approval, you will be required to submit one, newly-planned activity on the appropriate documentation form and include all required attachments. The file will be reviewed to determine if your provider unit is adhering to the CNE criteria.

Annual Reporting

Each Approved Provider Unit is required to submit an annual report by January 30 or deadline stipulated by TNA. Information includes any changes, statistical data and additional information as determined by the CCER.
## Timelines

### Newly Approved Providers

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Six Months</strong></td>
<td>• Establish process and structure to create a provider unit.</td>
</tr>
<tr>
<td></td>
<td>• Plan at least three activities totaling 3 contact hours or more, get them approved and presented</td>
</tr>
<tr>
<td></td>
<td>• Submit an Intent to Apply as a Provider Unit</td>
</tr>
<tr>
<td><strong>After Six Months</strong></td>
<td>• Submit provider application</td>
</tr>
<tr>
<td><strong>First Year</strong></td>
<td>• Submit annual provider survey.</td>
</tr>
<tr>
<td></td>
<td>• Review your progress in achieving your outcome measures.</td>
</tr>
<tr>
<td><strong>18 months after approval</strong></td>
<td>• Submit one newly planned activity with all attachments</td>
</tr>
<tr>
<td><strong>Second Year</strong></td>
<td>• Submit annual provider survey.</td>
</tr>
<tr>
<td><strong>Six months prior to expiration</strong></td>
<td>• Submit an Intent to Reapply as a Provider Unit</td>
</tr>
<tr>
<td><strong>Three months prior to expiration</strong></td>
<td>• Submit new provider application</td>
</tr>
</tbody>
</table>

### Currently Approved Providers

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Six months prior to expiration</strong></td>
<td>• Submit an Intent to Reapply as a Provider Unit</td>
</tr>
<tr>
<td><strong>Three months prior to expiration</strong></td>
<td>• Submit new provider application</td>
</tr>
<tr>
<td><strong>First Year</strong></td>
<td>• Submit annual provider survey.</td>
</tr>
<tr>
<td></td>
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</table>
Chapter 3: Educational Design Process

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This chapter outlines the process of developing and/or evaluating individual educational activities according to ANCC Accreditation Program criteria.

The educational design expectations described in this chapter and applicable at the individual activity level are fundamental to high-quality continuing nursing education. Accordingly, applicants must ensure that these expectations are met and the ANCC criteria for accreditation are applied in such a manner that ensures the applicant’s individual educational activities meet these criteria.

ANCC’s Accreditation Program specifies a comprehensive set of educational design criteria to ensure that individual education 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 health care . . .” (ANA, 2010, p. 43). The knowledge, skills, or attitudes gained from CNE activities can be applied regardless of the activity participant’s employer. See Table 3 (“Awarding Continuing Education Credit” p. 28) and Table 4 (“Evaluation Methods” p.32).

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 or organization-specific. Contact hours may not be awarded for the employer-specific content.

Contact hours may be awarded for review or refresher courses that focus on functioning in a particular facility or reinforcing basic knowledge (For example, ACLS update, PALS update, etc) However, contact hours may be awarded for refresher courses that provide nurses re-entering the job market with advanced knowledge or a new skill set required to function in the role as RN.

Types of Activities:

☐ Provider-directed, provider-paced: Live (in person or webinar)
  • Date of live activity:
  • Start date of enduring material:

☐ Provider-directed, learner-paced: Enduring material.
  • Expiration/end date of enduring material:

☐ Blended activity
  • Date(s) of enduring materials (e.g. prework):
  • Date of live portion of activity:
**Provider directed Provider paced:** The provider controls all aspects of the learning activity. The provider determines the learning objectives based on needs assessments, 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 determines the desired learning outcomes based on a needs assessment and gap analysis, selects content based on best available evidence, chooses strategies to facilitate learning, and identifies methods for collecting and analyzing evaluation data. The learner determines the pace at which he/she engages in the learning activity. (Examples include print articles, online courses, e-books, and self-learning modules/independent studies)

**Learner directed, learner paced:** Learner-directed, learner-paced: With guidance from a Nurse Planner, an individual learner takes the initiative in identifying his or her learning needs, formulating learning outcomes, identifying resources for learning, choosing and implementing appropriate learning strategies, and evaluating learning outcomes. The learner also determines the pace at which he or she engages in the learning activity.

**Considerations for Live and Enduring Formats:**

Live educational activities, whether in person or web-based, are Provider-directed, Provider-paced activities. There is no expiration date for a live activity; however, the Provider is expected to evaluate repeated activities as needed to determine that the practice gap still exists, that the underlying educational needs are still relevant for the target audience, and that content is still based on current evidence. Live activities, or portions of live activities, may be repurposed for enduring materials. If repurposed, an expiration date is assigned to the enduring activity.

Enduring activities are Provider-directed, learner-paced activities. Enduring materials have an expiration date, after which no contact hours may be awarded. The period of expiration of enduring material should be based on the content of the material. Providers must review content of enduring materials at least once every 3 years, or more frequently if indicated by new developments in the field specific to the enduring material. Review of enduring material content should be conducted for

- Accuracy of content,
- Current application to practice, and
- Evidence-based practice.

Upon completion of the enduring material review, a new expiration date should be established. (ANA Accreditation Manual, 2015)
ANCC GUIDELINES: Evaluating Activities for Awarding Continuing Education Credit

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
- At least 30 minutes in duration

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 of the activity that is appropriate, based on the guidelines stated above.

**Table 3. Evaluating Guidelines for Awarding Continuing Education Credit**

The fundamental basis for all CNE activities is the educational design process. This chapter outlines the required components of an individual education activity in accordance with ANCC accreditation criteria. Whether used by a provider to develop individual activities or by an approved provider unit for their individual activities, the educational design process remains consistent.

**Assessment of Learner Needs**

CNE activities are developed in response to, and with consideration for, the unique educational needs of the target audience.

Each educational activity is based on a needs assessment that may be conducted using a variety of methods that may include but are not limited to:

- Surveying stakeholders, target audience members, subject matter experts, or similar individuals
- Requesting input from stakeholders such as learners, managers, or subject matter experts
- Reviewing quality studies and/or performance improvement activities to identify opportunities for improvement
- Reviewing evaluations of previous educational activities
- Reviewing trends in literature, law, and health care

Sources of supporting evidence for needs assessment data may include but are not limited to:

- Annual employee survey data
- Literature review
- Outcome data
- Survey results from stakeholders
- Quality data
• Requests (via phone, in person, or by e-mail)
• Written evaluation summary requests

Assessment data is evaluated by the Nurse Planner and is used to validate the need for each educational activity. Assessment data is used to identify and validate a gap in knowledge, skills, or practice that the educational activity is designed to improve or meet. Data is then used to formulate the objectives for the educational activity. The purpose and objectives address current needs of the learners in the target audience related to their practice or professional development. The faculty/presenters/authors, if applicable, work with the Nurse Planner and Planning Committee to develop objectives, content, and teaching methods for the target audience of nurses, including advanced practice and specialty nurses.

**Professional Practice Gap**

The planning process begins with the identification of the practice gap. The practice gap might be to address a change to a standard of care, a problem that exists in practice. The Nurse Planner validates the need for the educational activity and determines the difference between the current state and the desired state.

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**Planning Committee**

At least two individuals responsible for planning each educational activity; one individual must be a Nurse Planner and one individual must have appropriate subject matter expertise.

**Content**

“Subject matter of education activity that relates to the education objectives.”

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

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**Planning Committee**

Planning Committees must have a minimum of one Nurse Planner and one other planner to plan each educational activity. The Nurse Planner is knowledgeable about the CNE process and is responsible for adherence to ANCC criteria. 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, etc.)
- Presentation skills
- Familiarity with target audience

The Nurse Planner is responsible for ensuring completion and review of Biographical/Conflict of Interest forms of the Nurse Planner and Content Expert

The Planning Committee, during the planning process, may also identify 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 and 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.

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 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.
**Target audience**
Once the professional practice gap has been identified, the planning committee determines the appropriate target audience.

**Learning Outcomes**
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 learning outcomes are developed. “A learning outcome is written as a statement that reflects what the learner will be able to do as a result of participating in the activity. The learning outcome must be observable and measurable. The outcome addresses the educational needs (knowledge, practice, skill) that contribute to the professional practice gap, and achieving the learning outcome results in narrowing or closing the gap. A learning outcome may be assessed over the short term or long term. There may be more than one learning outcome for an educational activity” (2015 Accreditation Provider Manual, p 25)

Educational objectives, (optional) which are derived from the overall purpose OR OUTCOME of the activity.

Educational objectives are written statements that describe learner-oriented outcomes that may be expected as a result of participation in the educational activity. These statements describe knowledge, skills, and/or practice changes that should occur upon successful completion of the educational activity.

Specific Outcomes (objectives) for the learning activity are developed collaboratively by the planners and faculty/presenters/authors (if applicable) and must relate to the purpose of the activity. Each objective should have one measurable action verb and specify what the learner will know or do once the objective has been completed (the outcome of attaining the objective).

For an educational activity lasting eight hours or less, with a single focus and purpose, it is appropriate to have outcomes (objectives) that flow from the purpose and reflect the learner’s progression through the activity.

For an educational activity lasting more than eight hours, or with multiple “tracks” or purposes, outcomes (objectives) should be specific to each session in that track.

Content for the educational activity must be congruent with each outcome (objective). Descriptions of content may not be a restatement of the objectives.

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.

Following development of objectives and selection of content, teaching-learning strategies are determined. The methods, strategies, and materials to be used by faculty/presenters/authors to cover each educational objective are identified. These must be congruent with both objectives and content.
As part of the design process, the Planning Committee must develop ways in which learners will be provided feedback. This can include but is not limited to having question/answer sessions during or at the conclusion of a learning activity, self-check questions, or comments within an activity, returning pre- and/or post-test questions with answers, or engaging learners in dialogue during or after the learning activity.

Successful completion for both live and enduring material/Web-based activities should be defined for each educational activity that is consistent with the purpose, objectives, and teaching/learning strategies. The criteria for successful completion are based on the format of the educational activity and should indicate what constitutes successful completion, the rationale for the method determining successful completion, and whether or not partial credit is awarded for participation. Criteria for successful completion may include attendance at the entire event or session, attendance for a predetermined percentage of the event, attendance at one or more sessions, completion/submission of the evaluation form, achieving a passing score on a post-test, and/or a return demonstration. The Planning Committee may elect to provide partial credit for educational activities. This could be contact hours awarded based on half-day attendance or on a certain number of sessions attended in a multiday conference.

The Planning Committee must determine how participation will be verified. The attendance/participation verification may include but is not limited to sign-in sheets/registration forms, signed attestation statement by participant verifying completion of an entire activity, or a collection of participation verification via computer log. Recordkeeping requires that the Planning Committee determine the method to collect both the participant’s name and a unique identifier.

**Awarding Contact Hours**

Contact hours are determined in a logical and defensible manner. 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 is a 60-minute hour. Activities must be a minimum of 30 minutes. No fewer than 0.5 contact hours can be awarded for an educational activity. 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.

**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. Evaluations may include both short- and long-term methods, as illustrated in Table 4.
Once the evaluations are complete, a summative evaluation is generated. The Planning Committee and/or Nurse Planner review the summative evaluation to assess the activity’s effectiveness and to identify how results may be used to guide future educational activities.

**Approval Statement**
The approval statement is the mark of an ANCC-approved organization. Prior to the start of every activity and on each certificate of completion that refer to the Provider’s Unit’s ANCC accredited status must contain the official accreditation statement.

The approval statement must be displayed clearly to the learner and worded correctly according to the most current Accreditation Manual.

When referring to contact hours, the term “accredited contact hours” should **never** be used. An organization is **accredited or approved**; contact hours are **awarded**.

**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
- Accreditation/approval statement
- Participant name

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Table 4. Evaluation options” (2015 Accreditation Provider Manual, p 26)

<table>
<thead>
<tr>
<th>Short-Term</th>
<th>Long-Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intent to change practice</td>
<td>Self reported change in practice</td>
</tr>
<tr>
<td>Active participation in learning activity</td>
<td>Change in quality outcomes measures</td>
</tr>
<tr>
<td>Post-test</td>
<td>Return on investment (ROI)</td>
</tr>
<tr>
<td>Return demonstration</td>
<td>Observation of performance</td>
</tr>
<tr>
<td>Case study analysis</td>
<td></td>
</tr>
<tr>
<td>Role play</td>
<td></td>
</tr>
</tbody>
</table>
Commercial Support
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.

Organizations providing commercial support may not provide or jointly provide an educational activity.

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. Providers developing educational activities must develop written policies and/or procedures for managing commercial support and/or sponsorship if the provider accepts commercial support. 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) p.68
- The agreement must include:
  - Statement that the provider of commercial support 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 presenters or faculty
    - Selection of teaching/learning strategies
    - Evaluation
  - Statement of understanding that the commercial support or sponsorship will be disclosed to the participants of the educational activity
  - Statement of understanding that the provider of commercial support must agree to abide by the provider’s policies/procedures
  - Amount of commercial support and description of “in kind” donation
  - Name and signature of the individual who is legally authorized to enter into contracts on behalf of the provider of commercial support name and signature of the individual who is legally authorized to enter into contracts on behalf of the provider of the educational activity
  - Date the agreement was signed
- Method of documenting how commercial support was used for the educational activity or activities

Conflicts of Interest Evaluation and Resolution
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 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. If the Nurse Planner has an actual or potential conflict of interest, he or she should excuse himself or herself from the role as Nurse Planner for the educational activity.
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. Nonprofit or government organizations, non-healthcare-related companies, and healthcare facilities are not considered commercial interests.

The Nurse Planner is 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, 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.
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 a review of a learning activity. All planners, reviewers, faculty, presenters, authors, and content reviewers are required to complete biographical/conflict of interest forms.

Figure 5

Resolutions may include, but are not limited to the following:
- Removing individual with conflict of interest from participating in all parts of the educational activity
- Revising the role of the individual with conflict of interest so the financial relationship is no longer relevant
- Not awarding contact hours for a portion or all of the educational activity
- Content of the educational activity evaluated for bias and activity monitored to evaluate for commercial bias
- Content of educational activity evaluated for bias and participant feedback reviewed for commercial bias

Evaluation
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.

Resolution and Activity Assessment
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.

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 materials (print, electronic, 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. 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 (i.e., 100% of activity, miss no more than 10 minutes of activity)
  - Successful completion of post-test (i.e., 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:** Learners are informed of any influencing relationships, or lack thereof, of planners, presenters, faculty, authors, or content reviewers in relation to the educational activity.
  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.

- **Expiration of enduring materials: (Called independent studies in Tennessee)**
  - 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 three years.

**Records**

Activity file records must be maintained in a retrievable file (electronic or hard copy) accessible to authorized personnel for six years.

Required recordkeeping components include:

- **Note:** most of the following list is included on the documentation form.

  - Title and location (if live) of activity
  - Type of activity format: live or enduring
  - Date live activity presented or, for ongoing enduring activities, date first offered and subsequent review dates
  - Description of the target audience
  - Method of the needs assessment
  - Findings of the needs assessment
  - Names, titles, and expertise of activity planners
  - Role held by each Planning Committee member (must include identification of the Nurse Planner and content expert(s))
  - Names, titles, and expertise of activity presenters, faculty, authors, and/or content reviewers
  - Conflict of interest disclosure statements from planners
  - Resolution of conflicts of interest for planners, if applicable
  - Conflict of interest disclosure statements from presenters, faculty, authors, and/or content reviewers
  - Resolution of conflicts of interest for presenters, faculty, authors, and/or content reviewers, if applicable
  - Purpose of activity
  - Objectives of activity
  - Evidence of gap in knowledge, skill, or practice for the target audience
  - Content of activity: an Educational Planning Table
  - Instructional strategies used
  - Evidence of learner feedback mechanisms
  - Rationale and criteria for judging successful completion
  - Method or process used to verify participation of learners
  - Number of contact hours awarded for activity, including method of calculation (Provider must keep a record of the number of contact hours earned by each participant)
  - Template of evaluation tool(s) used
  - Marketing and promotional materials
  - Means of ensuring content integrity in the presence of commercial support (if applicable)
  - Commercial support agreement with signature and date (if applicable)
  - Evidence of disclosing to the learner (in writing):
    - Purpose and/or objectives and criteria for successful completion
    - Presence or absence of conflicts of interest for all members of the Planning Committee, presenters, faculty, authors, and content reviewers
- Commercial support (if applicable)
- Expiration date (enduring materials/independent studies only)

- Documentation of completion must include:
  - Title and date of the educational activity
  - Name and address of provider of the educational activity (web address acceptable)
  - Number of contact hours awarded
  - Approval statement
  - Participant name

- Summative evaluation

- List of participant names with unique identifier (Include a representative sample of data collected in the activity file to be reviewed. The provider must maintain all participant data in a safe and secure manner.)

- Division of responsibilities among co-providers (if applicable)

- Co-provider agreement with signature and date (if applicable)

**Jointly Providing Continuing Nursing Education Activities**

Approved Providers and Individual Activity Applicants may jointly provide educational activities with other organizations. The jointly providing organization may **not** be a commercial interest. The Approved Provider or Individual Activity Applicant’s Nurse Planner must be on the planning committee and is responsible for ensuring adherence to the ANCC accreditation criteria.

The Approved Provider or Individual Activity Applicant is referred to as the provider of the educational activity. The other organization(s) are referred to as the joint-provider(s) of the educational activity. In the event that two or more organizations are Approved Providers, one will act as the provider of the educational activity and the other(s) will act as the joint-provider(s).

The Approved Provider or individual activity applicant acting as the provider of the educational activity is responsible for obtaining a written Joint provider agreement, signed by an authorized representative of the Joint co-provider that addresses the following:

- Name of Approved Provider or individual activity applicant acting as the provider
- The name(s) of the organization(s) acting as the Joint provider(s)
- Statement of responsibility of the provider, including the provider’s responsibility for:
  - Determining educational objectives and content
  - Selecting planners, presenters, faculty, authors, content specialists and content reviewers
  - Awarding of contact hours
  - Recordkeeping procedures
  - Evaluation methods
  - Management of commercial support or sponsorship
- Name and signature of the individual legally authorized to enter into contracts on behalf of the provider
- Name and signature of the individual legally authorized to enter into contracts on behalf of the Joint provider(s)
- Date the agreement was signed
Chapter 4 - Activities for Approved Provider Units

There are three types of activities that may be offered:

- **Faculty directed (Provider Directed, Provider Paced: Live or Webinar)**
  - CNE activity involves participant attendance. It is distinguishable by the fact that the pace of the activity is determined by the provider who plans and schedules the activity. Contact hour credit awarded is based on the time allocated for the activity. Examples of faculty directed CNE activities include but are not limited to conventions, courses, seminars, workshops, lecture series, and distance learning activities such as teleconferences and audio conferences. Knowledge and use of adult learning principles should be reflected in all aspects of the educational design, i.e. objectives, content, teaching methods, etc.
  - A faculty directed activity may be repeated as often as desired so long as the Nurse Planner determines it is still current unless substantial changes are made.

- **Independent Study (Provider Directed, Learner Paced)**
  - An Independent Study activity is designed for completion by learners, independently, at the learner’s own pace and at a time of the learner’s choice. The provider designs the educational activity and determines the amount of credit to be awarded. See Chapter 4 for the criteria for an Independent Study activity and sample completed forms.
  - Any individual, group or facility wishing to provide continuing education for nurses is eligible to apply for approval of CNE activities.

- **Blended (Learner Directed, Learner paced)**
  - With guidance from a nurse Planner, the learner takes the initiative in identifying his or her learning needs, formulating learning outcomes, identifying resources for learning, choosing and implementing appropriate learning strategies, and evaluating learner outcomes. The learner also determines the pace at which he or she engages in the activity.

**Educational Planning Table**

The educational Planning consists of several items of these items.

1. **List the title of the activity.** This title needs to appear the same throughout the documentation form and all attachments such as the certificate, advertising, etc.

2. **List the identified gap:** What is the difference between the current state and the desired state?

3. **Identify the learning outcome(s) for the activity**

4. **Select the appropriate practice gap**

5. **List the learning objectives (optional) These may help guide the presenter**

6. **Provide an outline for the content**

7. **Identify the approximate time frame**

8. **List the presenter**

9. **List the teaching methods/Learner engagement strategies**

10. **List the evidence based references**

Tennessee Nurses Association, 545 Mainstream Drive, Suite 405, Nashville, TN 37228/ 615-254-0350 / www.tmaonline.org
Revised June, 2013
11. Contact hours to be awarded. Contact hours may never be given retroactively. The documentation form must be completed before the start of the event.

1. If LIVE, calculate the time. Remember evaluation can be counted when calculating contact hours.
2. If ENDURING, identify how contact hours will be calculated.

12. Completed by: Include name and credentials.

13. Date

Additional information for the nurse planner and the planning committee

- Please be sure that this is indeed a continuing education activity and check the appropriate response. As noted in chapter 1, CNE is defined as planned, organized learning experiences designed to improve the knowledge, skills and attitudes of nurses. It enhances nursing practice, education, theory development, research and administration. The outcome of continuing education should be to improve the health of the public and nurses’ pursuit of their professional career goals.

- Planning Committee and Faculty/Presenters
  - For the documentation form, list the name and credentials of each person on the planning committee in section A. Include their completed bio forms with the documentation form. DO NOT include resumes or CVs.
  - There must be a planning committee for the activity. The planning committee must, at the minimum, consist of two people. Areas that must be represented on the planning committee include:
    - One Provider Unit Nurse Planner responsible for the activity (currently licensed RN who has at least a baccalaureate or higher degree in nursing, and who is responsible for adherence to criteria, rules and requirements); and
    - One person who has relevant content expertise.
  - In some instances the planning committee may ask an expert in the content to review the speaker(s) slides and handouts to insure that there is no bias, that there is content integrity, and that the information is the best available evidence at the time of the presentation. This content reviewer will need to provide a bio form and to be evaluated for conflict of interest prior to engaging in the review of the content.
  - The biographical forms and disclosure about conflict of interest must be updated with each newly planned activity.
  - 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. If the Nurse Planner has an actual or potential conflict of interest, he or she should excuse himself or herself from the role as Nurse Planner for the educational activity.
- Agenda/schedule and contact hours. Contact hours are awarded to participants for those portions of the educational activity devoted to didactic or clinical experience and to evaluating the activity.

- An agenda or schedule is needed if an activity is more than two hours long in order to determine the number of contact hours to be awarded to learners. The time spent on welcome, introductions of people vs. introduction to the topic, pre/post-tests, breaks, and evaluation need to be clearly and separately stated. Welcomes, introductions to people and space, breaks and exhibits are not included in the calculation of contact hours. The topic, pre/post-tests, demonstration/return demonstration, and evaluation are included in the calculation of contact hours. Evaluation is considered part of the learning activity and needs to be included in the calculation of contact hours.

- If the CNE activity is two hours or less, a separate schedule does not need to be included. You must, however, clearly delineate the time for introduction/welcome and evaluation time on p. 7 of the documentation form.

- The appropriate measure of credit is the 60 minute contact hour. A contact hour is 60 minutes of an organized learning activity, which is either a didactic or clinical experience. The minimum number of contact hours to be awarded is 0.5 (30 minutes). Contact hours may be calculated to the hundredths (i.e. 1.45, 0.91, etc.). They may not be rounded up! (e.g., 4.59 = 4.5 or 4.59, not 4.6)

- A sample schedule might look like this:

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00</td>
<td>Welcome &amp; Introduction</td>
<td>10 min. (not applicable NA)</td>
</tr>
<tr>
<td>8:10</td>
<td>Pre-test</td>
<td>20 min.</td>
</tr>
<tr>
<td>8:30</td>
<td>Talk #1</td>
<td>30 min.</td>
</tr>
<tr>
<td>9:00</td>
<td>Discussion</td>
<td>20 min.</td>
</tr>
<tr>
<td>9:20</td>
<td>Talk #2</td>
<td>50 min.</td>
</tr>
<tr>
<td>10:10</td>
<td>Break</td>
<td>15 min. NA</td>
</tr>
<tr>
<td>10:25</td>
<td>Supervised Practice</td>
<td>50 min.</td>
</tr>
<tr>
<td>11:15</td>
<td>Lunch &amp; Exhibits</td>
<td>60 min. NA</td>
</tr>
<tr>
<td>12:15</td>
<td>Panel Discussion</td>
<td>100 min.</td>
</tr>
<tr>
<td>1:55</td>
<td>Break</td>
<td>15 min. NA</td>
</tr>
<tr>
<td>2:10</td>
<td>Talk #3</td>
<td>50 min.</td>
</tr>
<tr>
<td>3:00</td>
<td>Ques. &amp; Ans.</td>
<td>15 min.</td>
</tr>
<tr>
<td>3:15</td>
<td>Evaluation &amp; Conclusion</td>
<td>15 min.</td>
</tr>
</tbody>
</table>

350 min. divided by 60 = 5.83 contact hours or 5.8 contact hours
Approval Statement as Noted on Advertising Material

Check the type of advertising being done for this activity and include a copy of each type of advertising.

Advertising material includes any method of announcing an educational activity. This may include a brochure, flyer, bulletin board announcement, newsletter, memo, e-mail or web site. The advertising material must be included with the documentation form. Also, include a hard copy of the e-mail or web site advertising. The advertising material may be the completed copy of a mock-up or the final material. If a mock-up of the advertising was used, the final copy of the advertising must be included in the file as soon as it is printed.

If your advertising states that contact hours will be awarded for the activity, the statement below must also appear on that advertising.

Sample:
Participants who successfully complete the entire activity receive at least 75% on the post-test and complete an evaluation form will earn 1 contact hour. OR

This activity will provide 1 contact hour.

(ABC Hospital) is an approved provider of continuing nursing education by the Tennessee Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.

An Approved Provider Unit may not state that an application has been submitted or is pending or use the word “approved.” This indicates an approval process which is not permitted in a provider unit.

Documentation of Completion/Certificate

A copy of the completed certificate or documentation of completion to be given to the learner must be included with the documentation form. It must include the following information:

Name of learner
Name and address of approved provider unit of the educational activity (web address acceptable)
Title & date of completion of educational activity
Number of contact hours awarded
Official approved provider statement

(ABC Hospital) is an approved provider of continuing nursing education by the Tennessee Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.

Commercial Support

Check yes or no to whether you have or are seeking commercial support on the documentation form. You need to list complete the section on how you will maintain content integrity and provide a copy of the signed written agreement.

- A commercial interest is defined by ANCC as any entity either producing, marketing, re-selling, 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, re-sells or distributes healthcare goods or services consumed by, or used on, patients. Exceptions are made for non-profit or government organizations and non-healthcare related companies.
- 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.
• A provider of commercial support may **not** be on an educational planning committee, be a joint provider of the activity, or the provider of the activity.
• If commercial support is provided for a CNE activity, an employee from the organization providing commercial support may **not** be a speaker.
• The individual activity applicant must have a signed, written agreement if commercial support is accepted.
• **Note:** You are not required to have a commercial support agreement for those who are only exhibiting at the event.

The Approved Provider Unit must adhere to the American Nurses Credentialing Center’s Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities at all times. These standards are listed in Appendix H, p. 61

- **Prevention of Bias:**
  - Manual). The Nurse Planner is responsible for ensuring that bias does not occur in the planning of the activity or the actual presentation. Several options to manage prevention of bias have been listed in the documentation form.

- **Disclosures:** Check how disclosures will be made to the learner and include a copy of these written disclosures that are given to the learners.

### Disclosures in the Planning Process:

**Signed Conflict of Interest Disclosure Form.** All planners, presenters, faculty, authors, and content reviewers must disclose any conflicts of interest related to planning of an educational activity. Forms must be signed and dated. Disclosure must be relative to each educational activity. If a potential or actual conflict is identified, the planning process must include a mechanism for resolution.

**Disclosures provided to the Learner:**

Learners must receive disclosure of required items prior to the start of an educational activity. In faculty directed 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.

**Disclosures always required include:**

- **Notice of requirements for successful completion of the educational activity:**
  Prior to the start of an educational activity, learners must be informed of the **purpose and/or objectives** of the educational activity and the **criteria 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 (i.e., attendee must score X% or higher)
  - Completed evaluation form
  - Return demonstration

- **Presence or absence of conflict 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. Individuals must disclose:
  - Name of individual
  - Name of commercial interest
    - Nature of the relationship the individual has with the commercial interest

Tennessee Nurses Association, 545 Mainstream Drive, Suite 405, Nashville, TN 37228/ 615-254-0350 / www.tmaonline.org
Revised June, 2013
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.

  o **Recordkeeping:** You must keep the records as designated here in the Provider Manual and in your Provider Unit policy. Information should be secure, confidential, and retrievable.

You must keep the following information for six years. (Note: most of this information is contained on the faculty directed or independent study documentation form plus required attachments)

- Title and location (if live) of activity
- Type of activity format: live or enduring
- Date live activity presented or, for ongoing enduring activities/independent studies, date first offered and subsequent review dates
- Description of the target audience
- Method of the needs assessment
- Findings of the needs assessment
- Names, titles, and expertise of activity planners
- Role held by each Planning Committee member (must include identification of the Nurse Planner and content expert(s))
- Names, titles, and expertise of activity presenters, faculty, authors, and/or content reviewers
- Conflict of interest disclosure statements from planners
- Resolution of conflict of interest for planners, if applicable
- Conflict of interest disclosure statements from presenters, faculty, authors, and/or content reviewers
- Resolution of conflict of interest for presenters, faculty, authors, and/or content reviewers, if applicable
- Purpose of activity
- Objectives of activity
- Evidence of gap in knowledge, skill, or practice for the target audience
- Content of activity: an Educational Planning Table
- Instructional strategies used
- Evidence of learner feedback mechanisms
- Rationale and criteria for judging successful completion
- Method or process used to verify participation of learners
- Number of contact hours awarded for activity, including method of calculation (Provider must keep a record of the number of contact hours earned by each participant)
- Template of evaluation tool(s) used
- Marketing and promotional materials
- Means of ensuring content integrity in the presence of commercial support (if applicable)
- Commercial support agreement with signature and date (if applicable)
- Means of ensuring content integrity in the presence of sponsorship (if applicable)
- Evidence of disclosing to the learner:
  - Purpose and/or objectives and criteria for successful completion
  - Presence or absence of conflicts of interest for all members of the Planning Committee, presenters, faculty, authors, and content reviewers
  - Commercial support (if applicable)
  - Expiration date (enduring materials only)
- Documentation of completion must include:
  - Title and date of the educational activity
  - Name and address of provider of the educational activity (web address acceptable)
  - Number of contact hours awarded
Individual Activity approval statement
Participant name
- Representative sample of participant names with unique identifier to be collected (Provider must maintain all participant data in a safe and secure manner.)
- Division of responsibilities among co-providers (if applicable)
- Joint-provider agreement with signature and date (if applicable)

**Joint providership**
- Check if you are or are not jointly providing this activity.
- If you are, list who your joint provider is and check that you will maintain the overall responsibilities for the items listed in item C. Attach the signed joint provider agreement.

When an activity is jointly provided, the Approved Provider Unit is referred to as the provider of the educational activity. The other organization(s) are referred to as the joint provider(s) of the educational activity. The jointly organization may not be a commercial interest or sponsor. The Approved Provider Unit’s Nurse Planner must be on the planning committee and is responsible for ensuring adherence to the ANCC accreditation criteria.

When an educational activity is jointly provided, the Nurse Planner is responsible for:
- The signed joint provider agreement
- Ensuring that the Approved Provider Unit’s name is prominently displayed in all marketing material and certificate
- The name(s) of the organizations acting as the joint provider(s)
- Statement of responsibility of the provider, including:
  - Determining educational objectives and content
  - Selecting planners, presenters faculty, authors, and content reviewers
  - Awarding of contact hours
  - Recordkeeping procedures
  - Developing evaluation methods
  - Managing commercial support or sponsorship
- Name and signature of the individual legally authorized to enter into contracts on behalf of the Approved Provider Unit
- Name and signature of the individual legally authorized to enter into contracts on behalf of the joint provider(s)
- Date the agreement was signed
APPENDICES

The following appendices are included for general information about the continuing education process and to provide assistance in meeting the criteria and rules in Chapters 2, 3 and 4 and on the provider application and the individual activity documentation forms. These have been divided into sections related to the approved provider unit functioning and the individual activities planned and presented.

Approved Provider Unit:

• Appendix A includes a chart which compares continuing education, in-service, orientation and basic educational preparation.

• Appendix B Sample organizational chart for the provider unit.

• Appendix C includes sample position descriptions for the Primary Nurse Planner and Nurse Planners.

Appendices related specifically to individual activities:

• Appendix D discusses how to write objectives and verbs commonly used in the three domains of learning.

• Appendix E discusses Joint providership and provides an algorithm that could be used by the provider unit and a sample agreement.

• Appendix F is sample disclosure statements.

• Appendix G is Conflict of Interest and Resolution.

• Appendix H includes ANCC’s content integrity standards for industry support in continuing nursing educational activities

• Appendix I is a sample summative evaluation.

• Appendix J includes a glossary of terms included in the manual.

Please note: The samples included in this manual are meant to be examples only.

References & Resources:

1. 2015 Primary Accreditation Application Manual, American Nurses Credentialing Center’s Commission on Accreditation, Silver Spring, MD, 2011.


3. Ohio Nurses Association
APPENDIX A
DIFFERENTIATION BETWEEN ORIENTATION AND CONTINUING NURSING EDUCATION

ORIENTATION
Educates for work at specific institution
Teaches and tests for skill competency
Addresses institution-based standards of practice

Target audience: nurses preparing for a new employer or a new career role

CONTINUING EDUCATION
Acquires new knowledge and skills to enable advanced decision making
Acquires greater depth of knowledge and skills in a particular area of nursing
Enhances professional attitudes and values
Advances career goals and promotes professional development
Supports innovation and creativity in practice
Implements change within the individual’s practice and within healthcare in general
Addresses new standards of practice, laws and rules

Target audience: nurses seeking enhanced professionalism and utilization of advanced nursing decisions and actions
APPENDIX B

SAMPLE
ORGANIZATIONAL CHART FOR THE PROVIDER UNIT

XYZ College of Nursing
CE Provider Unit

Organizational Chart

Betty Smith, PhD
President

Janet Mathews, PhD, RN
Dean, College of Nursing
Dean

Mary Jackson, MS, RN-BC
Primary Nurse Planner
Director, CE Department

Continuing Education
Advisory Council
(Nurse Planners)
Stephanie Baker, MSN, RN, BC, CNS
Judy Wilkins, MSN, RN
Sue Walden, BSN, RN
Christina McNeil, MS, RN-BC
Lisa Trotter, PhD, RN-BC
Molly Moore, BSN, RN-BC

Administrative Assistant
Sandy Williams
APPENDIX C
SAMPLE POSITION/ROLE DESCRIPTIONS

Some provider units may have Nurse Planners who are paid staff, volunteers or consultants or who are in a position other than continuing education/staff development. In these situations, there may be no job description or the person’s job description may not describe his/her role in the provider unit. The position description for the Nurse Planners and other key people in the provider unit must relate specifically to the person’s role in the provider unit, not the job description. Below are samples of a Primary Nurse Planner’s and a Nurse Planner’s position/role description in such an organization as described above. Note: These position/role descriptions are only one example of meeting the criteria.

Position Description for Primary Nurse Planner

Qualifications:
1. A minimum of a baccalaureate degree in nursing.
2. Hold a current, valid license as a registered nurse.
3. Experience with the assessment, planning, implementation and evaluation of continuing education activities.
4. Knowledge of and experience with adult learning principles.

Responsibilities:
1. Participate in and ensure that the ANCC accreditation criteria and TNA guidelines are met in regards to the assessment, planning, implementation and evaluation of all continuing education events offered for nurses.
2. Serve as resource and/or content expert when asked.
3. Select and orient new nurse planners and other key personnel in the provider unit.
4. Ensure that all Nurse Planners hold current, valid licenses as registered nurses and have a minimum of a baccalaureate degree in nursing.
5. Monitor the actions of the nurse planners in relation to the provider unit.
6. Oversee the functioning of the provider unit.
7. Implement the overall evaluation plan for the provider unit.

Position Description for Nurse Planners

Qualifications:
1. A minimum of a baccalaureate degree in nursing.
2. Hold a current, valid license as a registered nurse.
3. Experience with the assessment, planning, implementation and evaluation of continuing education activities.
4. Knowledge of and experience with adult learning principles.

Responsibilities:
1. Participate in and ensure that the ANCC accreditation criteria and TNA guidelines are met in regards to the assessment, planning, implementation and evaluation of all continuing education events offered for nurses.
2. Serve as resource and/or content expert when asked.
3. Discuss concerns/issues regarding programming with the Primary Nurse Planner.
4. Provide the Primary Nurse Planner with ideas/issues that may be developed into continuing education for nurses.
APPENDIX D
LEARNING OUTCOMES (BEHAVIORAL OBJECTIVES)

A. General Policies Related to Behavioral Objectives
1. Behavioral objectives are defined for each continuing education offering and used as a basis for determining content and learning activities, and evaluating effectiveness.
2. The objectives indicate the relationship to nursing and/or the bodies of knowledge which contribute to nursing practice.
3. Objectives are clearly stated, appropriate for the audience, relevant and attainable for the allotted time, observable and measurable.
4. Behavioral objectives describe what the learner will be able to do after participating in the offering. They will complete the sentence: "After this offering, the participants will be able to..."

B. Definitions Related to Behavioral Objectives
1. Behavior--any relevant, visible activity displayed by the learner (action verb).
2. Objective--communication of intent.
3. Learning--a relatively permanent change in behavior.
4. Exit behavior--behavior shown at the end of the learning experience.
5. Conditions--situations, equipment, weather, etc.
6. Criterion--standard or test by which exit behavior will be evaluated.

C. Characteristics of a Behavioral Objective
1. Contains one action verb.
2. Tells about the behavior or performance of learners.
3. Concerns the ends rather than the means--the exit behavior rather than the learning process.
4. Describes the conditions under which the learner will be performing exit behavior.
5. Includes information about the level of performance that will be considered acceptable.
6. Measurable in terms of observable behavior.
### D. Bloom’s taxonomy – Revised

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Tennessee Nurses Association, 545 Mainstream Drive, Suite 405, Nashville, TN 37228/ 615-254-0350 / www.tnaonline.org
Revised June, 2013
APPENDIX E

JOINT PROVIDERSHIP FOR APPROVED PROVIDERS
(1st two paragraphs excerpted from 2015 Primary Accreditation Application Manual)

When an activity is jointly provided, the Approved Provider is referred to as the provider of the educational activity. The other organization(s) are referred to as the Joint provider(s) of the educational activity. The Joint -providing organization may not be a commercial interest. The Approved Provider Unit’s Nurse Planner must be on the planning committee and is responsible for ensuring adherence to the ANCC accreditation criteria.

When an educational activity is Jointly provided, the Provider Unit’s Nurse Planner is responsible for:

- Signed Joint Provider agreement
- Ensuring that the Approved Provider name is prominently displayed in all marketing material and certificate
- The name(s) of the organizations acting as the Joint -Provider(s)
- Statement of responsibility of the provider, including:
  a. Determining educational objectives and content.
  b. Selecting planners, presenters/faculty, authors and content reviewers;
  c. Awarding of contact hours;
  d. Record keeping procedures;
  e. Developing evaluation methods; and
  f. Managing commercial support or sponsorship.
- Name and signature of the individual legally authorized to enter into contracts on behalf of the Approved Provider
- Name and signature of the individual legally authorized to enter into contracts on behalf of the Joint Provider(s)
- Date the agreement was signed.

Definition: To jointly provide is the process for planning, developing and implementing an educational activity by two or more organizations or agencies. (ANCC 2015 Primary Accreditation Application Manual). These organizations may be:

- Two or more Approved Provider Units;
- One Approved Provider Unit and one or more other organizations or individuals; or
- Two or more organizations or individuals who are not Approved Provider Units.

Nurse Planner: The collaborating organizations or individuals must determine which organization will be designated as the primary provider and which organization(s) will be the co-provider(s) for the event. If the primary provider for the event is also an Approved Provider Unit, this unit must have one of their Nurse Planners actively involved in the planning from the beginning. This Nurse Planner will be the person responsible for assuring that ANCC accreditation educational design criteria as provided by TNA are used to plan and implement the activity. When co-providing an educational activity, tasks involved in planning, implementing, and evaluating the activity may be shared; however, the final responsibility and accountability to insure that the criteria are met remain with the designated Approved Provider Unit. For example, the organizations together could meet to discuss desired objectives, but the final decision about which objectives to include and how they are written rests with the Nurse Planner. A written co-provider agreement confirms these arrangements.

Approval vs. Jointly providing: Jointly providing continuing education is not to be confused with approval of continuing education which is only allowed by a recognized approver unit. If your provider unit Nurse Planner was not actively involved in the planning of the event, you may not provide or jointly provide it.
Advertising: Any advertising should include all names of the provider and Joint provider(s). Your provider unit must be prominently mentioned in the advertising. For example, “ABC Hospital and Chapter x of the Medical/Surgical Nurses Association…”

Frequent Situations:
A. There are several instances when an Approved Provider Unit is asked to jointly provide an activity and it is not appropriate to do so. For example, when an employee is also involved in an outside organization and wants the Approved Provider Unit to give the contact hours; when an outside organization asks for contact hours for an event they planned, etc.

Questions to be considered are:
1. Who is included in the provider unit? Is the group asking for Joint providership part of the provider unit or outside of the provider unit?

If your answer is no to one or more of the following questions, this is not Joint Providership.
2. Has one of your Nurse Planners been actively involved in planning since the beginning?
3. Who is putting on the event – your organization or another organization?

As an Approved Provider Unit, one of your Nurse Planners must be involved in planning each educational event. Your provider unit may provide continuing education and award contact hours for this activity.

B. If an employee of your organization is working with a group outside of the work setting, the employee must involve a Nurse Planner to see if it would be beneficial or appropriate for your Approved Provider Unit to co-provide with this outside group. If the answer is yes, then the Nurse Planner will develop the co-provider agreement with the group, facilitate the planning process and proceed with the development of the co-provided event. The approved provider unit’s name must be included as one of the event providers on the advertising material, not just in the provider statement. If the co-provider relationship is not desired or appropriate, the Nurse Planner may refer the employee and group to an accredited approver such as TNA.

C. If one of your employees participates in a local chapter of a professional nursing organization and that organization wants to offer contact hours, the employee should contact the Nurse Planner to see if it would be beneficial and feasible to develop a co-provider arrangement with said professional nursing organization. The Nurse Planner would be in contact with the other agency/organization to plan and implement the Jointly provided activity. The Approved Provider Unit’s name must be prominently included on the advertising material. If the Joint provider relationship is not desired or appropriate, the Nurse Planner may refer the employee and group to an approved approver such as TNA.

D. If the Nurse Planner is approached by an entity that has planned and developed a CE activity and is seeking a contact hour approval process, the Nurse Planner must refer this entity to an accredited approver. In this instance, the Nurse Planner has not been involved in the planning process and, therefore, cannot jointly -provide.

E. If the Approved Provider Unit has a Joint provider agreement with an organization to put on an event and the Joint Provider now wants to offer the jointly provided activity in another venue without the provider entity, the Approved Provider Unit must refer the organization to an accredited approver such as TNA. That organization will then need to submit an application to get approval to offer contact hours for the activity from them.

In any or all situations, an Approved Provider Unit has the right to say no, we do not want to Joint -provide.

See the algorithm for a diagrammed copy of the above content on the page 56.
**Commercial Support:** Commercial interests (entities) may not jointly-provide. Commercial support, however, may be obtained for an event. This might include financial or in-kind contributions. Commercial supports are not part of the assessment, planning, implementation, and evaluation process for the activity, so they are not Joint-providers. However, be sure you follow the appropriate requirements regarding use of commercial support/sponsorship and how learners are informed.

**Fees for Joint-providing:** There are no ANCC accreditation criteria that prevent you from charging a fee for your time, expertise and resources to participate in planning an event, issuing certificates, keeping records, etc. However, be very careful that it is clear to all parties that the fee covers your involvement, not your “approval” of someone else’s activity.

**Repetition of a Learning Activity by a Joint provider**
If an approved provider unit and an outside entity (individual, company, etc.) plan a CNE activity together (Jointly provide), the Approved Provider Unit should plan and complete the planning documentation form with one of its Nurse Planners as part of the planning process. If the joint provider then wishes to repeat the CNE activity separately from the Approved Provider Unit, the Joint Provider must submit an application through an accredited approver such as TNA. The Approved Provider Unit may not approve the activity for the organization that was previously a Joint Provider for that activity, nor may the approved provider allow the outside entity to use the provider unit’s contact hours for repetition of the activity.

Example, Hospital X is an Approved Provider Unit. An outside company or a specialty nursing organization wants to plan a CNE activity with this hospital. Hospital X, if it is in the interests of its provider unit, can plan and implement the activity with active involvement of the Nurse Planner and a representative of the outside group. However, if the Joint Provider wishes to repeat this activity in various locations, having no direct relationship with Hospital X, it must submit an application to an approver such as TNA.
Joint -Providership Situations
(See form on website)

As An Approved Provider:
The Nurse Planner must be involved in planning each educational event.
- Your agency may provide education and award contact hours for this education, to nurses and dialysis techs.

If your employees are working with a group outside of the work setting:
- The employee must involve a Nurse Planner to see if it would be beneficial and appropriate to co-provide with the group.
- The Nurse Planner will develop the co-provider agreement with the group, facilitate the planning process and proceed with the development of a co-provided event.
- The Nurse Planner may refer employee and group to an approver (such as TNA) if the co-provider relationship is not desired.

If an employee participates in a local chapter of a professional nursing organization and that organization wants to offer CNE:
- The employee can notify the Nurse Planner to see if it would be beneficial and feasible to develop a co-provider arrangement with said professional nursing organization.
- Nurse Planner in contact with other agency would plan and implement the co-provided event.

If you are approached by an entity who has planned and developed a CNE event and is seeking contact hours:
- You must refer this entity to an accredited approver (such as TNA).
- In this instance, the approved provider has not been involved in the planning process and, therefore, cannot co-provide.

If the approved provider has a co-provider who now wants to offer the co-provided program in another venue without the provider entity:
- The Nurse Planner must refer the former Joint provider to an accredited approver (such as TNA) if contact hours are to be awarded.
APPENDIX F
SAMPLE DISCLOSURE STATEMENTS

The following are brief examples of how disclosures might be made prior to the start of the event. These disclosures can be made on the advertising, the confirmation letter, the agenda on top of the handouts received on the day of the event, etc. They could also be in multiple ways – e.g., purpose or objectives and criteria for successful completion on advertising, and then the remainder on the agenda received on the day of the event.

Conflict of Interest
- The planners and faculty have declared no conflict of interest.
- The planners and all but one faculty have declared no conflict of interest. Janet Smith has a conflict of interest as an author of the book “Everything You Ever Wanted to Know about Continuing Education.”

Commercial Support
- ABC Health Products Company provided an unrestricted grant for this activity.

Criteria for Successful Completion
- Criteria for successful completion include attendance at the entire event and submission of a completed evaluation form.
- Criteria for successful completion include attendance of at least 80% of the event and submission of a completed evaluation form.
- Criteria for successful completion include attendance at one or more sessions.

Outcome
- Simply state the outcome as you listed it in the documentation form, Item 7.E

Objectives
- Simply list the objectives as you listed them on educational planning table
APPENDIX G
CONFLICT OF INTEREST AND RESOLUTION
(Excerpt from the 2013 Primary Accreditation Application Manual)

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 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. If the Nurse Planner has an actual or potential conflict of interest, he or she should excuse himself or herself from the role as Nurse Planner for the educational activity.

*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. Nonprofit or government organizations, non-healthcare-related companies, and healthcare facilities are not considered commercial interests.

The Nurse Planner is responsible for ensuring that all individuals who have the ability to control or influence the content of an educational activity disclose all relationships with any commercial interest, including but not limited to members of the Planning Committee, speakers, 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.

Evaluation

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 relationship with a commercial interest exists. No resolution required.
- Relationship with a commercial interest exists. The relationship with the commercial interest is evaluated by the Nurse Planner and determined not to be relevant 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.
Resolution and Activity Assessment

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.

Disclosure

Prior to the educational activity, regardless of format or venue, any funding or in-kind support provided by a Commercial Interest Organization for the educational activity is disclosed to the learners/participants.

Individuals refusing to disclose relationships with Commercial Interest Organizations may not participate in any part of the educational activity.
**SAMPLE**

**TERMS AND CONDITIONS FOR SPEAKERS/AUTHORS**

Speakers/Authors: This document has been developed to better inform you of our policy. Please review each item, check your response, sign the document and return to ________________

Thank you.

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<thead>
<tr>
<th>TERMS &amp; CONDITIONS</th>
<th>AGREE</th>
<th>DISAGREE</th>
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<tbody>
<tr>
<td>1. I have disclosed to the Nurse Planner all potentially biasing relationship of a financial nature that exist or have existed within the last 12 months for both myself and my significant other (if applicable). I understand that these relationships will be shared with the learner.</td>
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<td>2. I will prepare fair &amp; balanced presentations/independent studies that are objective &amp; scientifically rigorous. Content will be well-balanced, evidence based where possible &amp; unbiased.</td>
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<td>3. If addressing unlabeled &amp;/or unapproved uses: I will clearly acknowledge the unlabeled identification or the investigational nature of drug products and/or devices to the learners.</td>
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<td>4. I will use generic names to the extent possible when discussing specific health care products or service. If I need to use trade names, I will use trade names from several companies when available &amp; not just trade names from any single company.</td>
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<td>5. Validation of content: I have reviewed the proposed content for this activity and find, to the best of my knowledge, the following:</td>
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<tr>
<td>A. This presentation/independent study is based on acceptable principles that are generally accepted as valid by the profession.</td>
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<tr>
<td>B. This content is based on conclusions or inferences about the evidence that are accepted in the general health care community as valid and sound.</td>
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<tr>
<td>C. Scientific research referred to in this presentation conforms to generally accepted standards of experimental design, data collection, &amp; analysis.</td>
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<tr>
<td>D. Content is accurate based on best information available at the time the presentation/independent study was developed.</td>
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<td>6. If I have been trained or utilized by a commercial entity or its agent as a speaker for any commercial interest, the promotional aspects of that presentation/independent study will not be included in any way with this activity.</td>
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<td>7. If I am presenting research funded by a commercial company, the information presented will be based on generally accepted scientific principles &amp; methods, &amp; will not promote the commercial interest of the funding company.</td>
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<td>8. The handouts and slides will not include logos from any commercial entity. (The copyright symbol may be included on each of the slides.)</td>
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<td>9. I understand that the Nurse Planner for this activity may need to review my presentation &amp;/or content prior to the activity &amp; I will provide educational content and resources in advance as requested.</td>
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I have carefully read and considered each item in this attestation form, and have completed it to the best of my ability.

Signature (may be electronic) __________________________ Date __________________________

**PRESENTATION TITLE:**
APPENDIX H
American Nurses Credentialing Center’s
Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities

Table of Contents for this appendix:
A. Introduction
B. Definition of a Commercial Interest Organization
C. Related Organizations
  1. Separate federal tax ID number
  2. Separate legal entity
  3. Operational structure separation
     a. Phone, fax line, email
     b. Web sites/links to web sites;
     c. Electronic databases and hard copy documents;
     d. Written policies and procedures
     e. Governance structure and personnel;
     f. Independent decision making
  4. Control of educational content
D. Types of Commercial Support for Continuing Nursing Education
  1. Financial Support
  2. “In-Kind” Support
E. Ensuring Content Integrity of an Educational Activity in the Presence of Commercial Support
  1. Written agreement between Commercial Interest and Organization
  2. Payments
  3. Unused Funds
  4. Co-Providing
  5. Accounting of Expenses
F. Conflict of Interest Evaluation and Resolution
G. Additional Criteria for Ensuring Content Integrity
  1. Promotion
  2. Advertisements
  3. Recruitment
  4. Confidentiality
  5. Advertising an Educational Activity
  6. Distribution of the Educational Activity
  7. Content of the Educational Activity
     a. Slides, handouts or other materials
     b. Live (in-person) activities – Logos and trademarks
     c. Enduring materials - Logos and trademarks
     d. Web-based materials – Logos and trademarks
     e. Evaluations
     f. Learner recruitment
H. Exhibits, Promotions and Sales
I. Giveaways
J. Failure to Comply
K. Complaints
A. Introduction
The American Nurses Credentialing Center’s Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities serves as a resource for accredited and approved organizations to provide quality continuing nursing education with integrity and free from undue influence from commercial interest organizations. Federal law, core values for the Accreditation Program (2009 and 2013 Application Manuals, Accreditation Program) and the Code of Ethics for Nurses (ANA, 2001) provide the foundation for these standards, which are designed to help accredited and approved organizations and those seeking ANCC accreditation comply with Food and Drug Administration Guidance on Industry-Supported Scientific and Educational Activities.

*"Provider" refers to an ANCC Accredited Provider or an organization or individual approved by [Tennessee Nurses Association] (Approved Provider or Individual Activity Applicant).

B. Definition of a Commercial Interest Organization
The American Nurses Credentialing Center (ANCC) defines an organization as having a commercial interest (“Commercial Interest Organization”)* if it:
- Produces, markets, sells or distributes health care goods or services consumed by or used on patients;
- Is owned or operated, in whole or in part, by an organization that produces, markets, sells or distributes health care goods or services consumed by or used on patients; or
- Advocates for use of the products or services of commercial interest organizations.

(*Reference: Accreditation Council for Continuing Medical Education (ACCME) Standards of Commercial Support, August 2007 (www.accme.org) - ANCC’s definition is intended to ensure compliance with Food and Drug Administration Guidance on Industry-Supported Scientific and Educational Activities and consistency with the ACCME definition)

Commercial Interest Organizations are inelig*ible for accreditation.

An organization is NOT a Commercial Interest Organization* if it is:
- A government entity;
- A non-profit (503(c)) organization;
- A provider of clinical services directly to patients, including but not limited to hospitals, health care agencies and independent health care practitioners;
- An entity the sole purpose of which is to improve or support the delivery of health care to patients, including but not limited to providers or developers of electronic health information systems, database systems, and quality improvement systems; or
- A non-healthcare related entity whose primary mission is not producing, marketing or selling or distributing health care goods or services consumed by or used on patients.
- Liability insurance providers
- Health insurance providers
- Group medical practices
- Acute care hospitals (for profit and not for profit)
- Rehabilitation centers (for profit and not for profit)
- Nursing homes (for profit and not for profit)
- Blood banks
- Diagnostic laboratories

(*Reference: Accreditation Council for Continuing Medical Education (ACCME) Standards of Commercial Support, August 2007 (www.accme.org) - ANCC’s definition is intended to ensure
compliance with Food and Drug Administration Guidance on Industry-Supported Scientific and Educational Activities and consistency with the ACCME definition)

C. Related Organizations

- Parent Organization – An organization that owns one or more subsidiary organizations. A parent organization that is a Commercial Interest Organization is **not eligible** for accreditation [or approval].
- Subsidiary Organization – An organization that is owned by a parent company. A subsidiary of a Commercial Interest Organization is **not eligible** for accreditation [approval].
- Sister Organizations – Two organizations that share a common parent owner are “sister organizations.” An organization **may be eligible for accreditation [approval]** if it establishes and maintains an adequate corporate firewall to shield it from the influence of a sister organization that is a Commercial Interest Organization.

Adequacy of a corporate firewall will be evaluated by examining evidence demonstrating independence, based on the following factors:

1. The commercial interest organization and its non-commercial interest sister organization (the “educational organization”) have separate federal tax ID numbers;
2. The commercial interest organization and the educational organization are separate legal entities;
3. The operational structure of the commercial interest organization and the educational organization are separate and distinct, including but not limited to:
   - Phone, fax and email communication;
   - Web sites/links to web sites;
   - Electronic and hard copy documents;
   - Written policies and procedures that may impact the delivery of continuing education;
   - Separate governance structures and personnel; and
   - Independence in decision making;
4. Educational content for activities is planned, developed, implemented and controlled exclusively by the educational organization. The commercial interest organization may have no influence over content of the educational activity.

D. Types of Commercial Support for Continuing Nursing Education

Commercial Interest Organizations may provide monetary funding or other support (“Commercial Support”) for continuing nursing education activities in accordance with the following fundamental principles:

1. Commercial Support must not influence the planning, development, content, implementation or evaluation of an educational activity; AND
2. Receipt of Commercial Support must be disclosed to learners.

Commercial Support may be used to pay for all or part of an educational activity and for expenses **directly related** to the educational activity, including but not limited to: travel, honoraria, food, support for learner attendance and location expenses. Commercial Support may be used to support more than one educational activity at the same time or multiple activities over a period of time.

Commercial Support is:

1. **Financial Support** - money supplied by a Commercial Interest Organization to be used by a provider for expenses related to the educational activity. Financial support may be provided as an unrestricted grant, educational grant, donation or scholarship.
2. **“In-Kind” Support** – materials, space or other non-monetary resources or services used by a provider to conduct an educational activity; which may include and is not limited to human resources, marketing services, physical space, equipment such as audio-visual
materials and teaching tools (for example, anatomic models). In-kind donations may not bear the trade names, logos or other identifying insignia of the Commercial Interest Organization.

In-kind support may not include promotion of goods or services of the Commercial Interest Organization. In the event that the trade name, logo or other identifying insignia cannot be removed (i.e. embedded in the piece of equipment), the provider must ensure that learners are aware of similar products produced by other companies. In addition, disclosure of the in-kind donation and a disclaimer that neither the provider nor ANCC [or Tennessee Nurses Association] is endorsing the product must be provided to learners.

E. Ensuring Content Integrity of an Educational Activity in the Presence of Commercial Support

Commercial Interest Organizations providing Commercial Support for continuing education may not influence the planning, implementation or evaluation of an educational activity. The following requirements to ensure content integrity must be satisfied by the provider when Commercial Support is accepted:

1. **Written Agreement.** There must be a written agreement between a Commercial Interest Organization providing Commercial Support and the provider utilizing Commercial Support. The written agreement must include the following:
   a. Name of the Commercial Interest Organization;
   b. Name of provider;
   c. Complete description of all Commercial Support provided, including both financial and in-kind support;
   d. Statement that the Commercial Interest Organization will not participate in planning, developing, implementing or evaluating the educational activity;
   e. Statement that the Commercial Interest Organization will not recruit learners from the educational activity for any purpose;
   f. Description of how Commercial Support must be used by the provider
      i. Unrestricted Use: Commercial Support given freely and without constraint by the Commercial Interest Organization and the provider has sole discretion to administer Commercial Support as appropriate for planning, developing, implementing or evaluating the educational activity;
      ii. Restricted Use: Commercial Support given to support a specific aspect of an educational activity such as meals, breakout sessions or speaker honoraria.
   g. Signature of a duly authorized representative of the Commercial Interest Organization with authority to enter into binding contracts on behalf of the Commercial Interest Organization;
   h. Signature of a duly authorized representative of the provider with authority to enter into binding contracts on behalf of the provider; and
   j. Date on which the written agreement was signed.

2. **Payments.** All payments for expenses related to the educational activity must be made by the provider. The provider must keep a record of all payments made using Commercial Support funding. Commercial Support funds may only be used to support expenses directly related to the educational activity.

3. **Unused Funds.** The Commercial Interest Organization may request the return of unused Commercial Support funds.

4. **Accounting of Expenses.** The Commercial Interest Organization may request that the Provider submit a record of how commercial support funding was spent.

5. **Joint -Providing.** In the event that more than two organizations will be providing an educational activity receiving commercial support (Joint -Providing), the organization identified as the “Provider” of the activity is responsible for managing commercial
F. Conflicts of Interest Evaluation and Resolution

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 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. If the Nurse Planner has an actual or potential conflict of interest, he or she should excuse himself or herself from the role as Nurse Planner for the educational activity.

*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. Nonprofit or government organizations, non-healthcare-related companies, and healthcare facilities are not considered commercial interests.

The Nurse Planner is responsible for ensuring that all individuals who have the ability to control or influence the content of an educational activity disclose all relationships with any commercial interest, including but not limited to members of the Planning Committee, speakers, 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.

Evaluation

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 relationship with a commercial interest exists. No resolution required.
- Relationship with a commercial interest exists. The relationship with the commercial interest is evaluated by the Nurse Planner and determined not to be relevant 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.**

**Resolution and Activity Assessment**
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.

**Disclosure**

*Individuals refusing to disclose relationships with Commercial Interest Organizations may not participate in any part of the educational activity.*

**G. Additional Criteria for Ensuring Content Integrity**

1. **Promotion.** A Commercial Interest Organization may not promote its goods or services in relation to the content of an educational activity at any time during which the educational activity takes place including the introduction and conclusion of the activity, regardless of the format of the educational activity.

2. **Advertisements for the Commercial Interest Organization.** Advertisements promoting the products or services of a Commercial Interest Organization in relation to the content of an educational activity must be physically separated from the educational activity, regardless of the format of the educational activity.

3. **Recruitment.** Commercial Interest Organizations may not recruit learners from an audience for any reason.

4. **Confidentiality.** Providers may not share confidential information related to learners without written permission from the learner.

5. **Advertising an Educational Activity.** A Commercial Interest Organization may advertise an educational activity for which it has given commercial support. Examples of advertising may include but are not limited to: Save the Date cards, flyers and emails.

6. **Acknowledgement of Commercial Support.** Providers may acknowledge Commercial Support provided by a Commercial Interest Organization on marketing materials for the educational activity.

7. **Distribution of the Educational Activity.** A Commercial Interest Organizations may not distribute educational activities directly to learners.
8. **Content of the Educational Activity.** Content is the responsibility of the provider of the educational activity. All materials used for the educational activity must be free from bias. To guard against the presence of bias, the provider is responsible for ensuring the following:

   a. Slides, handouts or other materials presented to the learner related to the educational activity do not display any logos or other trademarks of a Commercial Interest Organization;
   b. Live (in-person) educational activities are presented without reference to a Commercial Interest Organization, except for required disclosure;
   c. Enduring materials do not include logos, trademarks or other insignia of, or references to, a Commercial Interest Organization, except for required disclosure;
   d. Web-based materials do not include logos, other trademarks or other insignia of, or reference to, a Commercial Interest Organization, except for required disclosure;
   e. Evaluations of the educational activity make no reference to a Commercial Interest Organization or its products or services; and
   f. Learners are not recruited for any purpose during the activity or evaluation.

H. **Exhibits, Promotions and Sales**
Commercial Interest Organizations may not exhibit, promote or sell products or services during the introduction of an educational activity, while the educational activity takes place or at the conclusion of an educational activity, regardless of the format of the educational activity. Exhibits, promotion and sales must be separated from the educational activity. The following standards apply to exhibiting, promoting and selling products or services:

- Exhibiting, promoting and selling products may not take place during an educational activity;
- Marketing or advertisement for exhibits, promotions or sales may not be included within educational activity content (e.g., slides, handouts, enduring materials);
- Marketing or advertisement for exhibits, promotions or sales must take place in a location that is physically separated from the area where educational content is delivered.

I. **Giveaways**
Commercial Interest Organizations may provide giveaways for learners, as long as there is physical separation between accessing the giveaway and learner engagement in the educational activity. Educational materials for an activity may not be packaged in items bearing logos or trademarks of a Commercial Interest Organization.

J. **Failure to Comply**
Failure to comply with the American Nurses Credentialing Center’s Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities may result in suspension or revocation of approval.

K. **Complaints**
All complaints related to a Provider’s compliance with the American Nurses Credentialing Center’s Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities will be investigated by the [TNA Continuing Education Department].
SAMPLE COMMERCIAL SUPPORT AGREEMENT

Date:

Parties Involved in Agreement:
Provider name and representative’s name:
Joint -provider(s) name (if applicable):
Name of Entity providing commercial support :

The CE activity entitled _________________________ will be presented by (Provider name) and ( Joint -provider’s name(s) if applicable) on ____________ at ______________________.

(Commercial Support Entity’s name) will provide: _________________________.

The (Entity) will be recognized as providing commercial support or sponsorship in the advertising.

The commercial support will in no way influence or bias the cont2015 TNA Provider CE Manual.

The Commercial Interest Organization will not recruit learners from the educational activity for any purpose.

The signatures below by representatives from each organization listed above indicate agreement with the above statements.

Provider representative _________________________________________________Date __________

Joint provider (if applicable) representative ____________________________________ Date ________

Commercial Support Entity ______________________________________________Date _________
APPENDIX I
SAMPLE SUMMATIVE EVALUATION

| ABC Hospital                                                                  |
| Complementary Therapies from a Nursing Perspective                           |
| Evaluation Form                                                              |

12 Responses

1. **Were you able to achieve the following objectives?**
   A. Describe fundamental concepts of commonly used complementary therapies.  _12__ Yes  ___ No
   B. Identify common concerns regarding the use of complementary therapies.  _12__ Yes  ___ No

2. **Evaluate the speaker on teaching effectiveness on a scale of 5 (excellent) to 1 (poor):**
   Speaker: Jane Doe  5-10  4-2  3  2  1

3. **What other continuing education or topics would you like ABC Hospital to develop and present?**
   What’s going on legislatively that will affect nursing.
   Continuing education on Schedule II Meds and bill recently passed.
   Alternative methods to control chronic pain.

4. **Was the information presented fair, balanced and without bias?**  _12__ Yes  ___ No

5. **Comments:**
   Great program!
   Love the location
   Excellent program!
   Thank you for this great information.
   Great job! Love the quotes!
   Very effective.
   Very informative.

**Note:** Questions 1 & 2 are required for the evaluation form. The Provider Unit may add any other questions they wish.
APPENDIX J

GLOSSARY

This glossary is drawn from the glossary in the American Nurses Association’s Nursing Professional Development: Scope and Standards of Practice, (2010), ANCC Commission on Accreditation’s 2013 Primary Accreditation Application Manual (2011). The selected definitions are frequently used in the context of accreditation and approval and may in some cases require further elaboration in order to carry out the accreditation and approval processes.

Accountability: Responsibility for adherence to the ANCC accreditation criteria as they apply to providing quality CNE.

Accreditation: A voluntary process in which an institution, organization, or agency submits to an in-depth analysis to determine its capacity to provide or approve quality continuing education over an extended period of time.

Adult Learning Principles: The basis for, or the beliefs underlying, the teaching and learning approaches to adults as learners based on recognition of the adult individual’s autonomy and self-direction, life experiences, readiness to learn, and problem orientation to learning. Approaches include mutual, respectful collaboration of educators and learners in the assessment, planning, implementation, and evaluation of education activities.

Approval: A decision made by TNA’s Committee on CE Review that the criteria for approval of continuing education have been met. The Committee approves organizations to be Approved Provider Units and approves individual activities.

Approved Provider: Recognition by (TNA) of a provider's capacity to award contact hours for continuing education activities, planned, implemented, and evaluated by the provider.

Autonomy of the Provider Unit: The provider unit (not the larger organization) must be solely administratively and operationally responsible for coordinating all aspects of the continuing nursing education activities.

Bias: Tendency or inclination to cause partiality, favoritism or influence.

Biographical Data: Information required of persons involved in the peer review process or planning and delivery of continuing education activities. The data provided should document their qualifications relevant to the continuing education process or a specific activity with respect to their education, professional achievements and credentials, work experience, honors, awards, and/or professional publications.

Commercial Interest: Any entity either producing, marketing, re-selling 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, re-sells or distributes healthcare goods or services consumed by, or used on, patients. Exceptions are made for non-profit or government organizations and non-healthcare related companies. The definition allows an accredited [approved] provider to be owned by a firm that is not a commercial interest. It also allows a provider to have a “sister company” that is a commercial interest, as long as the accredited [approved] provider has and maintains adequate corporate firewalls to prohibit any influence or control by the “sister company” over the continuing education program of the accredited [approved] provider. In this case, ANCC would expect that the accredited [approved] provider would have an adequate corporate firewall in place to prohibit any influence or control by the “sister company” over the continuing education program.

Commercial Support: Financial, or in-kind, contributions given by a commercial interest, which is used to pay all or part of the costs of a CNE activity. Providers of commercial support may not be providers or co-providers of an educational activity.
Commission on Accreditation (COA): Appointed by and accountable to the ANCC Board of Directors, this body is responsible for development and implementation of the ANCC program for accreditation of continuing nursing education. The Commission is composed of at least 9 members selected from CNE stakeholder communities such as accredited organizations, consumers, nursing evaluation, and adult education.

Commitment: Duty or responsibility of those providing or approving continuing education to meet learner needs, provide quality CNE, and support Provider Unit goals and improvements.

Conflict of Interest: An affiliation or relationship of a financial nature with a Commercial Interest Organization that might bias a person’s ability to objectively participate in the planning, implementation or review of a learning activity. All planners, content reviewers and faculty/presenters/authors are required to complete Biographical/Conflict of Interest forms.

Contact Hour: A unit of measurement that describes 60 minutes of an organized learning experience. One contact hour = 60 minutes.

Content: “Subject matter of an educational activity that relates to the educational objectives.” (Nursing Professional Development: Scope and Standards of Practice, ANA, 2010)

Content Expert: An individual with documented qualifications demonstrating education and/or experience in a particular subject matter. This person is included on the planning committee of individual activities.

Content Reviewer: An individual selected 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.

Continuing Education Activities: Those learning activities intended to build upon the educational and experiential bases of an individual for the enhancement of practice, education, administration, and research or theory development, to the end of improving the health of the public.

Continuing Education Unit: (CEU) A specific, standard measure (10 clock hours) of educational achievement used by many universities and professional organizations under the criteria of the International Association for Continuing Education and Training (IACET) to attest to clock hour completion of continuing education activities. This terminology is not authorized by the ANCC Commission on Accreditation.

Continuing Nursing Education (CNE) activities: Those learning activities intended to build upon the educational and experiential bases of professional RN for the enhancement of practice, education, administration, research or theory development, to the end of improving the health of the public and RN’s pursuit of their professional career goals.

Joint-providership: Planning, developing, and implementing an educational activity by two or more organizations or agencies. When educational activities are jointly-provided and one of the providing entities is ANCC-accredited [TNA approved], the ANCC-accredited [TNA approved] provider unit retains responsibility for particular aspects of the process to assure adherence to all the ANCC [TNA] criteria. If collaborating providers are all ANCC-accredited [TNA approved], one is designated to retain the provider responsibilities by mutual written agreement. The unit designated to retain these responsibilities is referred to as the provider, and the other collaborating providers are referred to as Joint providers. If neither entity is approved as a provider, one takes the lead and is referred to as the provider of the activity; the other is the Joint-provider.
Distance Learning: A formal educational activity in which most of the instruction occurs when the learner and the educator are not in the same place. The instruction may take place either synchronously (at the same time) (e.g., interactive video) or asynchronously (at different times) (e.g., online/Internet or correspondence courses).

Educational Design: A plan for instruction documenting a needs assessment, description of the target audience, educational objectives, content outline, teaching methods, evaluation strategies, and designation of appropriate physical facilities and resources.

Educational Objective: Derived from the overall purpose of the activity, educational objectives are written statements that describe learner-oriented outcomes that may be expected as a result of participation in the educational activity. These statements describe knowledge, skills, and/or attitude changes that should occur upon successful completion of the educational activity.

Eligibility: An applicant’s ability to meet certain criteria in order to be considered qualified to apply for approval.

Enduring Materials: A non-live continuing nursing education activity that “endures” over time. Examples of enduring materials include programmed texts, audio tapes, videotapes, monograph or computer assisted learning materials, or other electronic media that are used alone or with printed or written materials. Enduring materials can also be delivered via the Internet. The learning experience by the nurse can take place at any time in any place, rather than only at one time or one place.

Evaluation: A systematic process by which a judgment is made about consequences, results, effects, or merit of a continuing education provider unit or continuing education program in order to make subsequent decisions. The process of determining significance or quality by systematic appraisal and study.

Gift “in-kind”: Non-monetary support (e.g. marketing assistance, meeting room, event registration assistance, etc.) provided by the giver to the taker. (In the Accreditation community, the “taker” is the provider of the continuing education.)

Leadership: The provision of direction and guidance to individuals involved in the process of assessing, planning, implementing and evaluating CNE activities in adherence to the ANCC criteria.

Learner Directed, Learner Paced Activity: A learning activity in which the learner takes the initiative in identifying his or her learning needs, formulating learning goals, identifying human and material resources for learning, choosing and implementing appropriate learning strategies, and evaluating learning outcomes. The learner also determines the pace at which the learning activity is engaged. Learner–directed activities may be developed with or without the help of others, but they are engaged in by only one individual.

Learning package: Materials and description of resources and requirements of the process for completing an independent study.

Marketing Materials: Method of announcing an educational activity. This may include a brochure, flyer, bulletin board announcement, newsletter, memo, email, Intranet posting, electronic message or web site.

Monitor: To periodically assess and evaluate continuing compliance with the criteria and operational requirements.

Multi-Focused Organization (MFO): An organization that exists for more than the purpose of providing education.

Need: Discrepancy between what is desired and what exists.

Needs Assessment: The process by which a discrepancy between what is desired and what exists is identified.
**Nurse Peer Review Leader:** A currently licensed RN with a master’s degree or higher, and with either the baccalaureate or graduate degree in nursing, who has the authority within the organization to evaluate adherence to the ANCC Accreditation Program criteria in the provision of CNE. (In Tennessee this person is the Executive Director at TNA.)

**Nurse Planner:** The Nurse Planner is actively involved in all aspects of planning, implementation and evaluation of the continuing nursing education activity. The Nurse Planner is responsible for ensuring appropriate educational design principles are used and processes are consistent with the requirements of the ANCC Accreditation Program as defined by TNA. The Nurse Planner of an Approved Provider Unit must be a licensed registered nurse and hold a baccalaureate or higher degree in nursing and be knowledgeable about the CE process and adult learning principles.

**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 support achievement of their career goals. (Nursing Professional Development: Scope and Standards of Practice, ANA, 2010)

**Objective:** see Educational Objective.

**Organizational chart:** A diagram or other schematic used to depict informal and formal lines of communication and relationships within the overall organization as well as the approver and/or provider unit.

**Orientation:** The process of introducing new staff to the philosophy, goals, policies, procedures, role expectations and other factors needed to function in a specific work setting. Orientation takes place both for new employees and when changes in nurses’ roles, responsibilities and practice settings occur.

**Outcome:** The impact of structure and process on the organization as a provider and the value/benefit to nursing professional development.

**Outcome Measurement:** “The process of observing, describing and quantifying predefined indicators of outcomes of performance.” (Nursing Professional Development: Scope and Standards of Practice, ANA, 2010)

**Pilot Study/Testing:** The process of assessing the capability of an activity or product to achieve the intended purpose(s). Pilot testing of an educational activity guides the determination of the effectiveness of the teaching/learning materials and contact hour credit to be awarded.

**Planning Committee:** At least 2 individuals responsible for planning each educational activity; one individual must be a Nurse Planner and one individual must have appropriate subject matter expertise.

**Position Description:** Description of the functions specific to the role of the Primary Nurse Planner, Nurse Planner and key personnel that relate to the Provider Unit.

**Primary Nurse Planner:** The Primary Nurse Planner is responsible for ensuring that all Nurse Planners are performing in a manner consistent with the policies, procedures, position descriptions, and expectations of the Approved Provider Unit and with the ANCC criteria as identified by TNA. All nurse planners contribute oversight and must be actively involved in both the planning and the analysis of evaluation data for the educational activity. The Primary Nurse Planner serves as the liaison between TNA’s Approver Unit and the Approved Provider Unit. The Primary Nurse Planner of an Approved Provider Unit must be a registered nurse and hold a baccalaureate or higher degree in nursing; have education or experience in the field of education or adult learning, and have experience or knowledge of the CNE criteria and rules.

**Process:** Process is the development, delivery and evaluation of CNE activities.

**Provider:** An individual, institution, organization, or agency responsible for the development, implementation, evaluation, financing, record keeping, and quality of CE activities.
**Provider directed Provider paced:** The provider controls all aspects of the learning activity. The provider determines the learning objectives based on needs assessments, 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 Activity:** The provider controls all aspects of the learning. The provider determines the learning objectives based on needs assessment, content of the learning activity, the presentation method, number of contact hours, evaluation and evaluation methods. Provider directed activities may be presented in a number of different vehicles - electronic, journal, lecture, etc.

**Provider Unit:** Comprises the members of an organization who support the delivery of continuing education activities.

**Purpose:** Written outcome statement related to what the learner will be able to do at the conclusion of the activity (i.e., “The purpose of this activity is to enable the learner to…”)

**Relevant Relationship:** A relationship with a commercial interest is considered relevant if the products or services of the commercial interest are related to the content of the educational activity. Financial relationships with any commercial interest of the individual’s spouse/partner are considered to be relevant relationships.

**Resources:** Available human, material and financial assets used to support and promote an environment focused on quality CNE and outcome measures.

**Retroactive Approval:** Peer review and approval of an activity that has already taken place; not authorized in the ANCC Commission on Accreditation.

**Single-focused Organization (SFO):** The single-focused organization exists for the single purpose of providing education.

**Structure:** Characteristics of an organization, including commitment, accountability, leadership, and resources that are required to support the delivery of quality CNE.

**Teaching Strategies:** Instructional methods and techniques that are in accord with principles of adult learning.