

## Operational Requirements Individual Activity

### January 2022

- i. There must be a Nurse Planner (NP) with a minimum of a Baccalaureate degree in Nursing or higher and one other planner to plan each educational activity: the Nurse Planner is knowledgeable about the educational planning process and is responsible for adherence to Accredited Approver criteria: one of the planners must be a content expert: the Nurse Planner may function as the content expert but in these instances, there must be another planner. A planning committee must have at least 2 members.
- ii. Must use ANCC/COA education design criteria to plan and implement all NCPD activities
- iii. Must maintain timely communication with the Accredited Approver by providing reports as requested
- iv. **Record keeping/maintenance:**  
Copy of all correspondence with ANA Massachusetts during the period of your application and approval, including but not limited to:
  - i. Approval letter
  - ii. Activity number
  - iii. Terms of approval

**Records** for all educational activities must be kept secure, confidential and retrievable for a period of 6 years.

- a. Educational records of each educational activity offered by the activity provider must include the following information:
  - Title and location (if live) of activity
  - Type of activity format: live, blended or enduring
  - Date live activity presented or, for ongoing enduring activities, date first offered and subsequent review dates
  - Expiration dates for enduring/blended activities
  - Nurse Planner Contact Information
  - Description of the Professional Practice Gap
  - Evidence to validate professional practice gap
  - Educational need that underlies the professional practice gap
  - Description of the target audience
  - A desired measurable outcome statement must be described for each activity. (Objectives do not substitute for this outcome statement, although the objectives may be reflected in the content outline).
  - Description of the outcome measure to be used to evaluate program
  - Content outline
- Evidence that the content reflects best available evidence and practice such as reference list

- Learner engagement (power point and lecture need additional engagement strategies)
- Criteria for awarding contact hours
- Rationale and criteria for judging successful completion
- 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)
- Description of the evaluation method
- A summation of the evaluation information based on the method chosen
- List of the individuals in a position to control content, Include name and credentials and role in the activity
- All documentation related to the assessment of financial relationships, any mitigation required and disclosures as applicable **SEE BELOW for updated information regarding relevant financial relationships**
- Documentation of the Nursing Continuing Professional Development Certificate for contact hours awarded to participants.
- Approval statement of provider awarding contact hours (ANCC Appendix 11, Accreditation Statements-2020)
  - Activity Approval:**  
This nursing continuing professional development activity was approved by American Nurses Association Massachusetts, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.
  - Pending Approval:**  
This activity has been submitted to American Nurses Association Massachusetts for approval to award contact hours. The American Nurses Association Massachusetts is accredited as an approver of nursing professional development by the American Nurses Credentialing Center's Commission on Accreditation
- Criteria for awarding contact hours
- Disclosure statements
- Commercial support (if applicable)
- Expiration date (enduring materials only)
- Commercial Support agreement (if applicable)
- Joint provider agreement with signature and date (if applicable)

**Documentation of completion must include written verification** of successful completion of each education activity offered by the provider must include:

- a. Name of learner
- b. Title and date of the education activity
- c. # of contact hours awarded
- d. Name and address of the provider of the educational activity
- e. Official approval statement (note that the approval statement for Activity providers will differ from that for Provider Units) \*\*\*

## **. Implementation of ANCC system of awarding credit.**

The number of contact hours awarded for an educational activity must be logical and defensible.

- There is not a minimum or maximum number of contact hours allowed.
- Pre-work, such as that described in the definition of blended learning can be included in the calculation of contact hours.

### **Live activities:**

- o Live activities or recorded webinars must provide contact hours based on time with 60 minutes of educational activity equal to one contact hour.
- o For an activity of less than three hours, stating start-end times or providing times for each segment of the activity are acceptable options.
- o If a live activity is greater than three hours, an agenda must be provided that contains time frames for each component of the activity.
- o Time for breaks, meals, and introductions (that do not include educational content (e.g., overview of the content, identification of expected outcome) should not be included in the calculation for total contact hours.

### **Enduring materials:**

Calculation for enduring materials can include a pilot study, Mergener formula, or other defensible rationale.

- o A pilot study involves a number of learners who complete the study and identify the length of time it took to complete the activity. Their times are then averaged to calculate the appropriate contact hours to award. Pilot study learners are the only learners who can obtain contact hours retroactively. Pilot study participants should be drawn from the pool of target audience members and should not include the NP, members of the planning committee, or content experts. While there is no specific number of people required to complete a pilot study, three to five is the usual number.
- a. A contact hour is 60 minutes of an organized learning activity, which is either a didactic or clinical experience. Welcome, introductions, breaks and viewing of exhibits are not included in the calculation of contact hours. Evaluation is considered part of the learning activity and may be included in the calculation of contact hours. If included, identify time factor utilized.

- b. If rounding the contact hours, the provider may round up or down to the nearest  $\frac{1}{4}$  (.025) hour ( i.e. if the Calculation is 1.19 contact hours, it maybe rounded up to 1.25 Contact hours)

**. If commercial support is provided** for an education activity, the Provider will maintain control of the educational content and disclose to the learners all financial relationships or lack of, between the commercial supporter and the provider and presenter(s).

- a. Funds from a commercial source to the provider of the education activity must be acknowledged in printed material and brochures.
- b. Arrangements for commercial exhibits will not influence the planning of or interfere with the presentation of education activities.
- c. Learners will be made aware of the nature of all commercial support of all education activities.
- d. Education activities are distinguished as separate from endorsement of commercial products. When commercial products are displayed, participants will be advised that approved status as a provider refers only to its nursing continuing professional development activities and does not imply either ANCC Commission on Accreditation or ANAMASS endorsement of any commercial products.
- e. Education activities that present research conducted by commercial companies will be designed and presented with scientific objectivity.
- f. Learners will be informed of an off-label use of a commercial product that is presented in education activities.
- g. Adhere to the ANCC Content Integrity Standards.

### **Financial relationship information**

If the program addresses a non-clinical topic (e.g. leadership or communication skills training, the nurse planner does not need to identify, mitigate or disclose relevant financial relationships for that program.

If the program does provide clinical content:

1. The nurse planner must collect information from all members of the planning committee, faculty, and others who would be in positions to control content. They must provide information about all their financial relationships with ineligible companies over the previous 24 months. *There is no minimal financial threshold: individuals must disclose all financial relationships, regardless of the amount, with ineligible companies* (Ineligible companies are those whose primary business is producing, marketing, selling, re-selling or distributing healthcare products used by or on patients.)
2. Review all relationships and exclude owners and employees of ineligible companies from participating as planners, faculty

or other roles unless the educational activity meets one of the following exceptions:

- When the content of the activity is not related to the business lines or products of their employer/company
- When the content of the approved activity is limited to basic science research such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make recommendations.
- When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or not the device is used.

3. Determine which financial relationships are **relevant** to the content of the continuing educational activity, **mitigate** those relevant financial relationships to prevent commercial bias, and **disclose** the presence or absence of all relevant financial relationships to learners prior to the activity.

- **Relevant:** Financial relationships are **relevant** if the following three conditions are met: a financial relationship, in **any amount**, exists between the person in control of the content and an ineligible company; the financial relationship **existed** during the past **24 months** and the content of the education is related to the products of an ineligible company with whom the person has a financial relationship.
- **Mitigate:** relevant financial relationships prior to individuals assuming their role(s) in the educational activity.

**Mitigation steps for Planners:**

- ✓ **Divest** the financial relationship
- ✓ **Recusal** from controlling aspects of planning and content with which there is financial relationship
- ✓ **Peer Review** of planning decisions by persons without relevant relationships
- ✓ **Other methods** (Must be described)

**Mitigation steps for faculty and others**

- ✓ **Divest** the financial relationship
- ✓ **Peer Review** of content by persons without relevant financial relationships
- ✓ **Attest** that clinical recommendations are **evidenced-based** and **free of commercial bias** (e.g. peer-reviewed literature, adhering to evidence-based practice guidelines)
- ✓ **Other methods** (must be described)

- **Disclose:** Before the learner engages in the education, **disclose** to learners the presence or absence of relevant financial relationships for all persons in control of content.

If no relevant financial relationships, inform the learners that the nurse planner, planners, content experts, faculty and others in control of content (either individually or as a group) have no relevant financial relationship(s) with ineligible companies.

If there are relevant financial relationship(s),

- disclose the name(s) of the individuals with relevant financial relationships
- name(s) (*identify the ineligible companies by their names only, do not include logos or trade names*) of the ineligible company(ies) with which they have a relevant financial relationship, the nature of the relationship(s)
- a statement that all relative financial relationships have been mitigated. The mitigation steps do not need to be outlined

#### Revised 12.2021 JG

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