

Roles and Responsibilities of Lead Planners, Coordinators, and Center for Learning and Professional Development Staff for Live Accredited Continuing Education (ACE) Activities

The Dartmouth Health Center for Learning and Professional Development (CLPD) has responsibility for all Accredited Continuing Education (ACE) activities. To this end, all activities requesting CE credits/contact hours must meet the Joint Accreditation (JA) requirements and guidelines.

Live ACE Activities: Planner Responsibilities

1. Identify a Lead planner:
 - a. For CME activities, the lead planner is a Dartmouth Health physician, researcher, doctorally prepared professional who possesses an official, current or emeritus/a faculty appointment from the Geisel School of Medicine at Dartmouth and is an employee in good standing of a Dartmouth Health Member Organizations, the VAMC, or the Geisel School of Medicine at Dartmouth.
 - b. For CNE activities, the lead planner is a Dartmouth Health NCEC nurse planner. (See [NCEC Members | Continuing Education for Professionals | DHMC and Clinics \(dartmouth-hitchcock.org.\)](#))
 - c. For Pharmacy activities, the lead planner is a Dartmouth Health pharmacist.
 - d. For ICPE activities, one of the above should be identified as the lead planner.
2. Lead planner responsibilities:
 - a. Assures compliance with [Joint Accreditation Criteria | Joint Accreditation.](#)
 - b. Takes responsibility for oversight of the financial integrity of the activity.
 - c. Reviews Financial Disclosure Forms and mitigates any relevant financial relationships, as necessary.
 - d. Ensures responsibility for adherence to no product-promotion or product-specific advertisements, including logos, being juxtaposed within educational materials.
 - e. Maintains accountability for adhering to all Dartmouth Health financial policies and procedures including reporting related to the activity.
3. Responsibilities of the planning committee:
 - a. Identifies learning gaps of the healthcare team/members.
 - b. Formulates primary purpose (need) of activity to address the knowledge, skills/strategies, performance, and/or patient outcomes.
 - c. Determines the learning objective(s) and activity outcome(s) in terms of knowledge, skills/strategies, performance, and/or patient outcomes.
 - d. Creates educational design and content that is appropriate for target audience.
 - e. Assures that the activity is generated around valid content.
 - f. Promotes active learning for the healthcare team that is consistent with the activities' desired results.
 - g. Secures and confirms faculty topics and time commitments.
 - h. Solicits exhibit fees from commercial companies, when appropriate.

- i. Solicits grants from commercial companies, when appropriate.
- j. Oversees actual course sessions or designates suitable personnel.
- k. Assures evaluation summaries are used to assess the extent to which learning objective(s) are met and no commercial bias was noted.
- l. Determines if changes in knowledge, skills/strategies, performance, and/or improvements in patient outcomes and population health have occurred.

Live ACE Activities: Activity Coordinator Responsibilities

1. In collaboration with the planning committee, completes and submits through an online accreditation application system **no later than 45 days prior to the date of the activity.**
2. Secures valid email addresses for all planners and faculty to be included in the online accreditation application to enable the Financial Disclosure and Mitigation functionality of the system.
3. Corresponds with company representative(s) for exhibits and secures Intent to Exhibit form(s) and payment.
4. Corresponds with company representative(s) for commercial grants and secures Letters of Agreement and payment. Must have signature from company and CE office prior to activity.
5. Corresponds with faculty and secures course materials, manages travel/accommodation arrangements, payment of honoraria, etc.
6. Arranges all activity logistics including securing conference space (internal and external) and securing and directing the caterer (provide menu selection, counts, etc.).
7. Takes Planning Committee meeting minutes or delegates to appropriate staff.
8. Prepares and submits applications for special accreditations (i.e., NASW, CDR) and follows responsibilities in accordance with the accrediting bodies' requirements.
9. Prepares and monitors draft budget through final accounting for the activity.
10. Prepares and finalizes marketing material information and submits accurate Marketing Intake Form to CLPD production staff (if utilizing CLPD marketing services).
 - If not using CLPD marketing services, includes DRAFT of marketing/flyer with application for approval prior to releasing.
11. Produces final course materials and prepares packets or collaborates with CLPD website staff if handouts are being distributed online.
12. Produces participant list, nametags and labels for packets (if desired) using registration data provided by CLPD if using CLPD registration service.
13. Follows the CLPD registration procedure if using the CLPD registration service
14. Processes payments for all activity expenses through Dartmouth Health Accounts Payable using unique project number assigned by CLPD for each activity.
15. Provides AV support or delegates to appropriate party.
16. Staffs the event the day(s) of the activity and manages registration and event logistics.
17. Collects and returns to the CLPD all accreditation and registration related paperwork in a timely manner.

Live ACE Activities: Center for Learning and Professional Development (CLPD) Responsibilities

1. Program Planning

- a. Provides link to JA Accreditation Application for developing the conceptual framework and considerations of the ACE activity.
- b. Consults with planning committees upon request.
- c. Designates appropriate number of credits/contact hours.
- d. Documents evaluation and outcome measure process.

2. Program Promotion and Registration

- a. Creates webpage activity listing on CLPD website and provides online registration for Dartmouth Health live activities and online enduring materials.
- b. Creates email marketing campaigns using current CLPD email address list.
- c. Generates standard direct mail marketing design for print materials using standard Dartmouth Health and appropriate accreditation branding.
- d. Reviews and approves all promotional materials for compliance with accreditation guidelines.
- e. Ensures correct use of accreditation and credit designation statements.
- f. Compiles targeted mailing lists from the CLPD and Referring Physicians databases.
- g. Manages participant registration and online payments including refunds through the CLPD website for Dartmouth Health live activities.
- h. Reconciles all conference income for every activity that online registration was processed.

3. Evaluation/Outcome Measures/Maintenance of Records

- a. Produces and administers online Activity Evaluations/Outcome Measure.
- b. Provides evaluation summary for activity (mandated for accreditation, compliance, and quality) to the Activity Coordinator and/or Lead Planner for the planning committee.

4. Online Credit Transcripts

- a. Awards or designates CE credits/contact hours to individuals' online transcript.
- b. Adds individuals' CE credits/contact hours manually to online transcript, if necessary.

5. User Support

- a. Responds to inquiries from learners regarding
 - i. Registration issues
 - ii. Log on troubleshooting
 - iii. Transcript access
 - iv. Issues with mobile sign-in
 - v. Recording mobile sign-in attendance after activity code expiration