American Holistic Nurses Association

Resource & Instruction Manual for Individual Educational Activity Applicants
Dear Applicant,

Welcome to the American Holistic Nurses Association (AHNA) Education Approver Unit’s Individual Educational Activity Application process. The American Holistic Nurses Association is an accredited approver of continuing nursing education by the American Nurses Credentialing Center’s (ANCC) Commission on Accreditation (COA). All policies and processes used within the AHNA Education Approver Unit are consistent with the 2015 ANCC criteria for continuing nursing education (CNE).

The members of the Education Approver Unit (EAC) are committed to supporting applicants in the preparation of the materials required for peer review of individual educational activities. This AHNA Resource & Instruction Manual for Individual Educational Activity Applicants has been created to provide applicants with important information about:

1) the AHNA Education Approver Unit philosophy, purpose and goals;
2) the application and review process;
3) content integrity;
4) educational design; and
5) resources to guide applicants in completing the required elements of an application for approval to award CNE.

If you have questions or concerns, please do not hesitate to contact the AHNA. You can direct your communication to Denise Beadles, AHNA Education Assistant at approval@ahna.org or 800-278-2462, or Deb Shields, Nurse Peer Review Leader at DEBSHIELDS@aol.com. We are happy to support you as you complete your application and will respond to your communication within three business days.
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The American Holistic Nurses Association (AHNA) Education Approver Unit (EAC) believes that nursing is an art and a science, with the primary purpose of assisting others toward the wholeness inherent within them. The concepts of holistic nursing are based on a broad and eclectic academic background, a sensitive balance between art and science, analytical and intuitive skills, and the opportunity to choose from a wide variety of healthcare approaches to promote the harmonious balance of human energy systems. Nurses have the ability to enable people to take personal responsibility for wellness and thus, facilitate wholeness. The teaching/learning process supports achieving this outcome.

The EAC believes that lifelong learning is the responsibility of the nurse, and is essential for professional development, competence in nursing practice, and moving the profession of nursing forward. Consistent with the ANCC definition of continuing nursing education (CNE), the EAC believes that these learning activities are intended to "build upon the educational and experiential bases of the professional RN for the enhancement of practice, education, administration, research, or theory development, to the end of improving the health of the public and the RN's pursuit of their professional goals" (ANCC, 2015, p 55). In addition, the EAC believes that continuing education creates opportunities for nurses to develop self-awareness and empowerment, and integrate self-care and holism into their lives. Continuing education facilitates the integration of holism into practice settings as nurses grow personally and increase their knowledge of holistic nursing.

The EAC is committed to the professional development of nurses. This commitment is operationalized by:

1. approving individual educational activity applications in accordance with the ANCC Commission on Accreditation (COA) criteria,
2. setting policy within the guidelines of the ANCC COA and the AHNA Board of Directors, and
3. monitoring consistency and quality of AHNA Education Approver Unit approved activities through ongoing provider support

The AHNA Education Approver Unit adheres to the ANCC Primary Accreditation Conceptual Frameworks as illustrated and described below:
“The Primary Accreditation Conceptual Framework© is based on the quality improvement framework of Donabedian’s triad (structure, process, and outcome) (Donabedian, 1966). The accreditation criteria are organized by the domains in this framework. As applied within the Accreditation Program, criteria within the domain of Structural Capacity (structure domain) are used to evaluate the infrastructure of an organization and its capacity to function as an Accredited Approver. Criteria within the domain of Educational Design Process (process domain) are used to evaluate the quality of the peer review process used to evaluate educational planning, implementation, and evaluation by approved providers and/or individual activity applicants. Criteria within the domain of Quality Outcomes (outcome domain) are used to evaluate the impact of CNE on the professional practice of nursing and/or patient outcomes” (ANCC, 2015, p 7 & 8) © American Nurses Credentialing Center. All rights reserved. Reproduced with permission by the American Nurses Credentialing Center.
Overview of the Application Approval Process

This section includes essential information related to the development and submission of an individual educational activity for continuing nursing education (CNE). It begins with an overview of the application and submission review process, followed by more in-depth explanations of specific components of the application.

Submitting an Application for Approval of an Individual Educational Activity

1. Applications must be received at least 60 days before the start or go-live date of the educational activity, but it is recommended that applicants submit the completed application as early as possible to ensure there is maximum time for application review and the submission of any revisions or additional materials requested by the Nurse Peer Review Leader (NPRL).
2. Before beginning the application and supporting documents, familiarize yourself with the AHNA Resource & Instruction Manual for Individual Educational Activity Applicants.
3. Determine your ability to apply (see Eligibility Verification of the Individual Education Activity Applicant, p 8)
4. Complete, in full, the Application for Approval of an Individual Educational Activity
5. Submit the completed application packet as Microsoft Word documents in separate email attachments to approval@ahna.org. Application packets must include:
   1) Application for Approval of an Individual Educational Activity
   2) Written Outcome Measures
   3) All advertising / marketing material
   4) Disclosure to Learners document
   5) Certificate of Completion
   6) AHNA Approved Program Directory Data Form
   7) Additional documents as required for your specific activity
   8) Payment Form and payment method to the AHNA for application review

Application Review Process

1. The Education Assistant (EA) acknowledges receipt of the application with a reply email within three business days.
2. A tracking number is assigned to the application and must be used in all communication related to the application, particularly in the email subject line.
3. Application fees are processed through the AHNA secure system. If AHNA calculates a fee that is different from what the applicant calculates, the applicant is notified before the fee is processed.
4. The Education Assistant conducts a quantitative pre-review of application; additional materials may be requested after staff pre-review:
   A. Programs with an established start date have two (2) weeks to submit revisions
   B. Programs without an established start date can take up to two months to submit revisions; if there is no response from the applicant during that time, the application review process is stopped. Resubmission would constitute a new application with payment of fees.
5. When all staff pre-review criteria are met, the application is sent to the Nurse Peer Reviewer (NPR); please note that only complete applications will be sent for review.
6. The Education Assistant, working with the Nurse Peer Review Leader, notifies the applicant in writing the results of the application review. If revisions and/or additional information is needed, the applicant has two (2) weeks to submit this. It is important to remember that approval must occur **before the date** of the live or go-live event; **there is NO retroactive approval and contact hours cannot be awarded prior to approval.**

7. All application materials and communication between the applicant and the AHNA are kept confidential and securely stored at AHNA Headquarters for a period of seven (7) years.

**Types of Action Taken on Applications**

1. **Approval:** The application meets all criteria; approval granted for two (2) years.
2. **Decision Pending:** The application requires additional information before a decision can be determined.
3. **Denial:** The application does not meet the ANCC Commission on Accreditation criteria because the content is not eligible for continuing nursing education approval, the established criteria are not met, and/or the content is not considered holistic continuing nursing education.

**The Role of the Nurse Planner**

The **Nurse Planner (NP)** is accountable for oversight of **all phases** of the educational activity, from the initial planning stages until the post-activity assessment.

A Nurse Planner is a Registered Nurse who holds a current, unencumbered nursing license (or international equivalent) and a baccalaureate degree or higher in nursing (or international equivalent). The NP is actively involved in all aspects of planning, implementation and evaluation of the CNE activity. The NP **must** have direct involvement in: a) planning the activity from the beginning; b) preparation of the application; and, c) the evaluation and reporting process throughout the 2-year approval period. The NP should be familiar with the principles of adult education, and is responsible for ensuring that appropriate educational design principles are used and the processes are consistent with the requirements of the ANCC Primary Accreditation Program.

The Nurse Planner’s role in identifying and resolving actual and/or potential conflicts of interest is inclusive and requires in-depth evaluation of all individuals in a position to control the content of an educational activity. ANCC (2015) mandates that “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. Relationships with commercial interest organizations are considered relevant if they existed within the past twelve months” (p 27). If a planner/presenter has a relevant relationship with a commercial interest organization, the Nurse Planner must implement a process and take action to resolve the conflict of interest **prior to approval to award CNE.**

The NP validates that all required application materials are complete. The NP is responsible for orchestrating and maintaining post-activity evaluation summaries; these must be available upon request by the AHNA. Additionally, the NP ensures that the educational activity is consistent with the **AHNA / ANA Holistic Nursing: Scope & Standards for Practice (2013).**
The NP is responsible for receiving and responding to all communication from the AHNA Education Assistant and Nurse Peer Review Leader. If you have further questions about the Nurse Planner’s role and responsibilities, email approval@ahna.org.

We would like to acknowledge that the role of the NP requires hours of detailed oversight to ensure adherence to criteria and quality of nursing education necessary to move the profession forward.

Application for Approval of an Individual Educational Activity

Eligibility Verification of the Individual Educational Activity Applicant

Applicants must first determine whether they are eligible to apply for CNE (AHNA Application II Section A-C). The Individual Educational Activity Applicant is defined as an individual, organization, or part of an organization submitting an educational activity for approval from an Accredited Approver (e.g., AHNA). The Applicant must:

1. Have one qualified Nurse Planner: a licensed RN with BSN or higher in nursing
2. Have a Planning Committee with a minimum of two members; one planner must be a Content Expert
3. Not be a commercial interest (ANCC Content Integrity Standards 1-1-13 updated 12.7.16.pdf)
4. Be in compliance with all applicable federal, state, and local laws and regulations that affect the organization’s ability to meet ANCC accreditation criteria
5. Comply with all educational design requirements as noted in the application document
6. Have a holistic focus of content and learner engagement strategies

Types of Educational Activities

After determining, that the eligibility requirements are met, the Nurse Planner must identify which type of educational activity they are developing (AHNA Application II Section E).

1. Provider-directed, provider-paced (Live): The provider controls all aspects of the learning activity. The provider determines the desired learning outcome 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. Live activities may be in-person or web-based. 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, they must be resubmitted to AHNA for approval separately from the live program application.

The AHNA Application further distinguishes the Provider-directed, provider-paced activities into two categories for the AHNA’s annual reporting to ANCC:

<table>
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<tr>
<th>C</th>
<th>Course</th>
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<td>A course is a live educational activity where the learner participates in person. A course is planned as an individual event. Examples: annual meeting, conference, seminar.</td>
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2. **Provider-directed, learner-paced (Enduring, Non-live):** The provider determines the desired learning outcome 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 or she engages in the learning activity. Examples include print articles, self-paced online courses, e-books, and self-learning modules.

The expiration date of enduring material must be in print at the start of the activity, and this date represents the expiration of the approval. Prior to renewal of an enduring activity, applicants must review content for: 1) accuracy; 2) current application to practice; and, 3) evidence-based practice. Documentation of the review process must be submitted with the renewal application.

The AHNA Application further distinguishes the Provider-directed, learner-paced activities into two categories for the AHNA's annual reporting to ANCC:

<table>
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<th>EM</th>
<th>Enduring Material (Home Study)</th>
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<tr>
<td>IEM</td>
<td>Internet Activity Enduring Material</td>
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3. **Blended Activities:** These educational activities are a combination of live and enduring processes. Examples include educational activities in which the learners read print articles before attending the activity or engage in out-of-class homework assignments between/following live sessions. The applicable subtypes must be indicated on the application.

**Ensuring Independence and Content Integrity**

The information included in this section is used with permission and drawn largely from the 2015 *ANCC Primary Accreditation Approver Application Manual*, Chapter 3, pp 27 – 29.

**Independence from Commercial Interest Organizations**

The educational planning process outlined provides independent continuing education firmly rooted in the identification of professional practice gaps and learning needs of registered nurses and/or members of the healthcare team. In order to fully ensure independence of these CNE/
Interprofessional continuing education (IPCE) activities and meet accreditation criteria, actions that ensure there is no commercial influence in the planning and execution of these activities are an important component of the overall process. This process is the responsibility of the Nurse Planner and the Planning Committee.

The following is an abbreviated outline of the requirements for ensuring independence and content integrity when planning educational activities. See ANCC Content Integrity Standards for Industry Support in Continuing Nursing Educational Activities 1-1-13 updated 12.7.16.pdf, for full standard requirements.

Assessing Content for Relevance to Commercial Interest (AHNA Application III, Section A)

The first step is a general assessment of the content. The NP must evaluate each content component of the educational activity to determine whether the content is related in any way to a tangible product that is used on or by patients.

If there is NO relationship between any product and the content of the activity, then no Conflict of Interest (COI) forms are required.

If there is a relationship between any product and the content of the activity, the NP must conduct an individual conflict of interest evaluation of each person involved in planning, presenting and evaluating the program. This process begins with each individual planner, speaker, presenter, author, and / or content reviewer completing a Conflict of Interest (COI) form. The completed COI forms must be submitted with the application as individual documents. In order to effectively assess this information, the NP may need to elicit more detail from the presenter about the breadth of the content.

Conflict of Interest

A conflict of interest exists when an individual is in a position 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. Those in a position to control or influence content include, but are not limited to, those who develop or format content, select presenters/faculty, present and/or facilitate the delivery of content.

The Nurse Planner is responsible for identifying and resolving conflicts of interest during the planning and implementation phases of an educational activity. Relationships with commercial interest organizations are considered relevant if they existed within the past twelve months. Relationships of the individual’s spouse/partner are considered relevant and must be reported, evaluated, and resolved. The Nurse Planner is responsible for confirming all of the information reported on the COI form. This includes, for example, speaking directly with each individual, examining websites, and conducting google searches as indicated.

A. There are three key questions to consider when assessing for conflict of interest. The answers to all 3 questions must be yes in order for a conflict of interest to be present.

1) Does the individual have the ability to control the content?
2) Does the individual have a financial relationship with a commercial entity? A commercial entity is one that produces, markets, resells or distributes healthcare goods or services consumed by or used on patients; an entity controlled by such a company; or an entity that advocates for use of products / services of a commercial entity.
3) Are the products of the company related to content of the activity?

B. Determine the relationship of the individual with the COI and the commercial entity.
1) If the individual has a **non-employee relationship** with the commercial interest company then that COI can be resolved.

2) An **employee/owner** of a commercial entity cannot be involved with an activity if the products/services of that company are related to the content of the activity.

**If the Nurse Planner has a conflict of interest, he or she must recuse himself or herself from the role of Nurse Planner for the educational activity.**

**Resolution of COI**

When an individual has a non-employee relevant relationship with a commercial interest organization, the Nurse Planner must implement a process to resolve the conflict of interest. Actions taken to resolve conflicts must be documented on the individual Conflict of Interest forms **prior to approval**. The documentation must demonstrate (1) the identified conflict and (2) how the conflict was resolved.

Resolution processes may include but are not limited to the following:

1. Removing the individual with a conflict of interest from participating in all parts of the educational activity;
2. Revising the role of the individual with a conflict of interest so that the relationship is no longer relevant to the educational activity;
3. Not awarding continuing education contact hours for a portion or all of the educational activity;
4. Undertaking review of the educational activity by the Nurse Planner and/or member of the Planning Committee 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;
5. Undertaking review of the educational activity by the Nurse Planner and/or member of the Planning Committee 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;
6. 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; or
7. 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.
EVALUATING CONFLICTS OF INTEREST

Identify all individuals in a position to control or influence content of the educational activity

Able to control or influence content

Bio/COI documentation is required

Evaluate any relationships with declared with commercial interest organizations

No relationship with commercial interest organization present

No resolution required

Disclosure to learners: no COI

Relationship with commercial interest organization present; content of the educational activity is not related to the products or services of the commercial interest organization

No resolution required

Disclosure to learners: no COI

Relationship with commercial interest organization present; content of the educational activity is related to the products or services of the commercial interest organization

Resolution is required

Disclosure to learners: no COI

Actions taken to resolve COI may include but are not limited to:
- Remove individual from participating in all parts of the educational activity
- Revise the role of the individual with conflict of interest so the relationship is no longer relevant
- Do not award contact hours for a portion or all of the activity
- Evaluate activity for bias prior to delivery and monitor activity for bias during activity
- Evaluate activity for bias prior to delivery and assess learner feedback for bias after activity

Of note: Employees of a commercial interest organization may not participate in an educational activity if the content is related to the products or services of the commercial interest

ANCC Accreditation Program

Disclosure to learners: COI present
Commercial Support (AHNA Application VIII, Section D)

Commercial interest organizations may provide monetary funding or other support (Commercial Support) for continuing nursing educational activities in accordance with the fundamental principles that:

1. Commercial Support must not influence the planning, development, content, implementation, or evaluation of an educational activity
2. Receipt of Commercial Support must be disclosed to learners.
3. Amount of commercial support or the value of in-kind contributions must be documented on the Application
4. A signed Commercial Support Agreement must be submitted with application packet (Appendix A: Commercial Support Agreement)

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 nonmonetary resources or services used by a provider to conduct an educational activity, which may include, but are not limited to, human resources, marketing services, physical space, equipment such as audiovisual components, and teaching tools (for example, anatomic models or essential oil samples). When possible the names of commercial interest organizations are removed or covered from tools.

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

Commercial interest organizations providing commercial support for continuing educational activities may not influence or participate in the planning, implementation, or evaluation of an educational activity. The provider must satisfy all of the following requirements to ensure content integrity when commercial support is accepted.

1. The commercial interest organization and the provider must have a written agreement setting forth the terms of the relationship and the support that will be provided. The written agreement will also reflect the requirements set forth in items 2-, below.
2. All payments for expenses related to the educational activity must be made by the provider and may only be used to support expenses directly related to the educational activity.
3. The provider must keep a record of all payments made using Commercial Support funding and is responsible for maintaining an accounting of expenses related to Commercial Support.
4. A commercial interest organization may not jointly provide educational activities.
5. A commercial interest organization may support **non-educational** activities (e.g. providing snacks); a Commercial Support Agreement is not required if the support is related to non-educational activities.
**Joint Providership** (AHNA Application VIII, Section E)

Individual Educational Activity Applicants may jointly provide educational activities. The joint provider organization may **not** be a commercial interest. The Individual Educational Activity Applicant’s Nurse Planner must be on the planning committee and is responsible for ensuring adherence to the ANCC accreditation criteria.

The Individual Educational 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 ANCC accredited or approved, one will act as the provider of the educational activity and the other(s) will act as the joint provider(s).

The approved organization (Provider) assumes responsibility for adherence to the ANCC criteria. Materials associated with the activity such as marketing materials, advertising, agendas, and certificate of completion must clearly indicate that the approved organization (Provider) is awarding contact hours and is responsible for adherence to ANCC criteria.

Joint Providership Agreements are not required as part of the application packet. The AHNA does, however, recommend that a written agreement be utilized that clearly outlines the responsibilities of each party. A sample of a Joint Provider Agreement is included in (*Appendix B: Joint Provider Agreement*). This agreement is not required to be submitted for review.

Joint providership must be disclosed. The learners must be made aware of all of the organizations that were involved in the planning of the activity prior to the beginning of the activity.

**Educational Design Process**

The information included in this section is used with permission and drawn largely from the 2015 *ANCC Primary Accreditation Approver Application Manual*, Chapter 3, pp 23 – 35. The educational design expectations described and applicable at the individual educational activity level are fundamental to high-quality continuing nursing education (CNE). Accordingly, organizations accredited as Approver Units (e.g., the AHNA Education Approver Unit) must ensure that these expectations are met and that the ANCC criteria are applied in such a manner as to ensure the Individual Educational Activity Applicant offers educational activities that meet these criteria. It is recommended that the reader follow along the AHNA *Application for Approval of an Individual Educational Activity Application* in order to maximize the benefits of using this resource.

CNE is designed to advance the professional practice of nursing and to positively affect patient and/or population outcomes and healthcare systems. CNE is defined as “learning activities intended to build upon the educational and experiential bases of the professional RN for the enhancement of practice, education, administration, research, or theory development, to the end of improving the health of the public and RNs’ pursuit of their professional career goals” (ANCC, 2015, p 55). Interprofessional continuing education (IPCE) is defined as that which occurs “when members of two or more professions learn with, from, and about each other to enable effective collaboration and improve health outcomes” (www.jointaccreditation.org).
Advancement of the nursing profession requires that all CNE providers must design educational activities based on a critical analysis of current practice, identification of gaps in knowledge, skills and/or practice and the provision of content to achieve the desired state of nursing practice.

The following diagram illustrates this process.

IV.A.1.a **Current State**
What problem or opportunity for change is currently occurring for nurses relative to the practice of nursing? This should be about WHY the activity is needed, not a description of the course.

IV.A.1.b **Desired State**
This should describe a picture of the “perfect world” state of nursing practice (relative to the current state). Often the intended Learner Outcome of the educational activity is a step toward this desired state.

IV.A.1.c **Gap**
Identify if there is a knowledge, skill or practice (implementation) gap and what specifically creates that gap. It is not required to identify a gap in all three areas, but the identified gaps should be addressed by this activity’s content.

IV.A.4 **Learner Outcome(s)**
LOs must be at least a step toward the Desired State, written in measurable terms, and reflective of the problem. There may be one or more LOs. Conferences with multiple tracks may have more than one LO.

IV.B.1 **Content Abstract**
Describe the key points of content, incorporating how the learner will be engaged in the learning process. Be brief and concise and convey how the LO will be reached.

D. Fienhage, AHNA Education Assistant 2016
Professional Practice Gap / Needs Assessment (AHNA Application IV Section A.1.)

The process of planning begins with identifying when CNE or IPCE might be a desired intervention to address a change in a standard of care, a problem that exists in practice or an opportunity to advance nursing practice.

The Nurse Planner and Planning Committee starts by analyzing data that validate the need for the educational activity. This analysis forms the basis of identifying the professional practice gap.

IV.A.1.a. What is the learner’s current state – responses must be limited to what is the question, problem, or opportunity for change and growth? This is not a description of the course.

IV.A.1.b. What is the desired state – what should the nurse/learner know (knowledge), know how to do (skill), or practice differently in order to move the practice of nursing forward?

IV.A.1.c. The professional practice gap can then be defined by the difference between the current state and the desired state of practice. The NP must document where this gap exists in terms of knowledge, skills and/or practice.

It is important to note that a professional practice gap may exist for Registered Nurses or healthcare teams regardless of the practice setting. Professional practice gaps are not limited to clinical practice; they may also exist in areas of professional work such as administration, education, and research.

It is important to remember that gaps in all areas are not likely to be met in a short educational activity. The Nurse Planner is mindful of this as the activity is planned; for example, the learner may first need knowledge (cognitive) before being able to perform the skill. There is no requirement that every educational activity address gaps in all areas; it is required that the educational activity be developed in order to address the identified gap.

A useful tool for developing the needs assessment is the Gap Analysis Worksheet for Individual Educational Activities (Appendix C: Gap Analysis Worksheet for Individual Educational Activities)

Evidence to Validate Practice Gap (AHNA Application IV Section A.2)

Identify sources of evidence as well as a brief description of how these resources validate the current state and the gap(s).

Target Audience (AHNA Application IV Section A.3)

Once the educational need/gap has been identified, the Nurse Planner and Planning Committee can determine the target audience for the educational activity. The target audience is defined as the specific registered nurse learners or healthcare team members the educational activity is intended to impact.

Learning Outcome(s) (AHNA Application IV Section A.4)

The Nurse Planner and Planning Committee then develop the desired learning outcome for participants in the target audience. 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 educational activity. The learning outcome must be observable and measurable. It addresses the educational needs (knowledge, skills, and/or practices) 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 short term or long term. There may be more than one learning outcome for an educational activity (e.g. conferences with different learning tracks).

As a point of clarification, it is essential to differentiate learning objectives from the learning outcomes. Learning objectives define the expected goal of a presentation, course or curriculum in terms of demonstrable skills or knowledge that will be acquired as a result of instruction; they tend to be specific and discrete units of knowledge (e.g. ‘Define holistic nursing’, ‘Identify three aspects of presence’). Learning outcomes are statements that identify a broad change in nursing practice made up of many units of knowledge. They describe measurable and essential mastered content, knowledge, reflecting skills and competencies resulting from the educational activity (e.g. ‘The learner will address the spiritual needs of their patients’, ‘The learner will apply principles of holism in developing nursing curriculum’).

**Content Development and Delivery** (AHNA Application IV Section B)

Content for the educational activity may be chosen by the Nurse Planner and Planning Committee, or it may be selected by others participating in the educational activity such as individual speakers or authors. It is the responsibility of the Nurse Planner and Planning Committee to ensure that content is based on the most current evidence, which may include, but is not limited to, evidence-based practice, literature, peer-reviewed journals, clinical guidelines, best practices, and content experts’ opinion. If there is concern that content selected is not based on best available evidence or may be biased within the educational activity, the Nurse Planner and Planning Committee may choose to engage a Content Reviewer. The purpose of a Content Reviewer is to provide independent and expert evaluation of content to ensure best available evidence is presented, content is balanced, and content is not promotional or biased. The Content Reviewer is not a member of the Planning Committee.

In a Blended Educational Activity, the NP must describe how the out-of-class activities inform the educational content in order to address the professional practice gap. The entirety of the educational activity must be cohesive.

References and resources must be clearly identified (AHNA Application IV Section B.1.a). If, for example, a website is cited, the Nurse Planner must specify what exactly on this site is relevant to the educational activity. The Nurse Planner must be discerning when reviewing references; while 5 – 7 years is a helpful guide; some historical texts are relevant. On the other hand, some areas are changing so rapidly that 5-year-old reference materials may be outdated.

**Learner Engagement Strategies** (AHNA Application IV Section B.2)

As part of the design process, the Nurse Planner and Planning Committee develop ways to actively engage learners in the educational activity. Strategies to engage learners may include, but are not limited to, integrating opportunities for dialogue or question/answer, including time for self-check or reflection, analyzing case studies, and providing opportunities for problem-based learning. Active learner engagement may function as an opportunity for formative assessment during the educational activity by providing the presenter with immediate learner feedback. In congruence with ANCC criteria and holistic philosophy “Lecture & PowerPoint” are not sufficient as the sole teaching strategies.
Holistic Philosophy (AHNA Application IV Section B.3)

As part of the design process, the Nurse Planner and Planning Committee must describe how the philosophy of holism is foundational to and integrated within the educational activity. This may include relating the content to the AHNA Core Values and/or the AHNA/ANA Holistic Nursing: Scope & Standards of Practice (2013).

Evaluation of the Learning Outcomes (AHNA Application Section V)

The evaluation process is the means by which the NP and the Planning Committee determine to what extent the learning outcome has been met. The evaluation components and method(s) of evaluation should be relative to the identified gaps and the desired learning outcome(s) of the educational activity. This assessment may be formative and integrated within the educational activity and/or summative at the conclusion of the educational activity. Evaluation methods include assessment of change in knowledge, skills, and/or practice of the target audience. Change in knowledge, skills, and/or practice may or may not occur based on a variety of factors; however, evaluation should assess for such change. Evaluation may also include collecting data that reflects barriers to learner change.

See possible short and long-term evaluation methods to assess change in practice listed in the AHNA Application Section V.

Following the conclusion of the educational activity, the Nurse Planner and Planning Committee review the evaluation data to assess the impact of the educational activity and determine how results may be used to guide future updates to the content or the development of other educational activities, as applicable.

The NP is responsible for orchestrating and maintaining post-activity evaluation summaries which must be available upon request by the AHNA. This documentation must be maintained for a minimum of seven (7) years from the date of expiration.

Criteria for Successful Completion to Award Contact Hours (AHNA Application Section VI)

During the planning process, the Nurse Planner and Planning Committee determine the criteria that learners must meet to earn contact hours. Criteria should be based on the desired learning outcome(s). Criteria may include, but are not limited to, participation in the activity, attendance for a specified period of time (e.g., 100% of activity, or missing no more than ten minutes of activity), successful completion of a post-test (e.g., attendee must score X% or higher), completion of an evaluation form, or successful completion of a return demonstration. NOTE: When return demonstration is incorporated as a ‘completion requirement’, this denotes that a specific set of criteria must be met; thus, the applicant must provide documentation of how criteria will be made known to learners and what tool will be used to assess participants’ successful demonstration.

Calculation of Contact Hours (AHNA Application Section VII)

The Nurse Planner and Planning Committee determine the method for calculating the number of contact hours 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 = sixty minutes. 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.

Provider-directed, provider-paced activities (AHNA Application VII Section A.1.a or b and c) must outline times spent in various parts of the live activity. Time frames must match and support the contact hour calculation. If the activity is greater than 3 hours in length, evidence must be outlined in the agenda. Welcome, introductions, breaks, tours, and any other non-education components (e.g., viewing of exhibits) are not included in the calculation of contact hours. Evaluation time over 10 minutes must be justified in writing. (Appendix D: Sample Agenda and CNE Calculation)

For Provider-directed, learner-paced educational activities (AHNA Application VII Section A.2.a and b), the Nurse Planner and Planning Committee must show evidence of how they calculated the contact hours; methods of calculation might include historical data, pilot studies and/or complexity of content determined by a mathematical calculation. The Mergener Formula is one reliable way of calculating contact hours. (Appendix E: Mergener Formula)

Contact hours may not be awarded retroactively except in the case of a pilot study. Participants in a pilot study assist in determining the contact hours based on the length of time required for completing an educational activity.

Supporting Documents

Advertising (AHNA Application VIII Section A)

All advertising must be congruent with the information described on the approved application in terms of title and provider of the educational activity. Approval statements on advertisement are not required but highly recommended. When referring to contact hours, the terms “CEU” and “accredited contact hours” should never be used (contact hours are awarded. You are not required to advertise but if you plan to then the types of advertising developed or planned must be identified and submitted for review (e.g. printed or online materials).

Advertising of CNE must adhere to the following guidelines:

If advertising is released prior to approval AND after an application has been submitted, the following statement may be used (AHNA Application VIII Section A.2.):

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

If the advertising is to be released after approval is received, the following statement must be used (AHNA Application VIII Section A.3.):

This nursing continuing professional development activity was approved by American Holistic Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.
Written Disclosures (required) (AHNA Application VIII Section B)

Learners must receive required information prior to the start of an educational activity. In live activities, required information must be provided to the learner prior to initiation of the educational content. Disclosures can be made in the confirmation letter or other pre-event communication, posted clearly at the registration table, or at the beginning of activity via handout or the first slide of the first PowerPoint.

For activities designed for enduring materials (print, electronic, or web-based activities), the required information must be visible to the learner (printed prior to content of an article or slide presentation, included in registration material, etc.) prior to the start of the educational content. Blended activities that begin with learner-paced material must provide disclosures to learners before they begin the leaner-paced content.

Required disclosure information may not occur or be located at any point after the start of an educational activity.

Required Disclosures to learners include:

1. Requirements for Successful Completion or awarding contact hours: Learners are informed of the criteria that will be used to award contact hours, which may include, but are not limited to:
   A. Actual time spent in the educational activity;
   B. Required attendance time at activity (e.g., 100% of activity, or missing no more than ten minutes of activity);
   C. Successful completion of post-test (e.g., attendee must score X% or higher); and
   D. Completed evaluation form

2. Presence or absence of conflicts of interest for all individuals in a position to control content of the educational activity.
   A. For individuals in a position to control content who have a relevant relationship with a commercial interest organization (conflict of interest is present), the following required information must be provided to learners:
      1) Name of individual;
      2) Name of commercial interest;
      3) Nature of the relationship the individual has with the commercial interest
   B. For individuals in a position to control content who do not have a relevant relationship with a commercial interest organization, the activity provider must inform learners that no conflict of interest exists.

3. Official Approval statement and # of approved CNE contact hours. This statement must never be altered.
   This nursing continuing professional development activity was approved by the American Holistic Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation.

AHNA Non-Endorsement of Modality statement:
Approval for contact hours through the American Holistic Nurses Association is based on an assessment of the educational merit of this program and does not constitute endorsement of the use of any specific modality in the care of clients.
Additional required information for disclosure, if applicable, includes:

4. Commercial support: Learners must be informed if a commercial interest organization has provided financial or in-kind support for the educational activity;
5. Joint providership: Learners must be informed of the provider of the educational activity and all other organizations that participated in joint planning of the activity.
6. Expiration of enduring materials: Educational activities provided through an enduring format (e.g., print, electronic, web-based) are required to include an expiration date documenting the time period during which contact hours will be awarded; and

(Appendix F: Sample Disclosure Template)

**Certificate or Documentation of Completion** (AHNA Application VIII Section C)

A certificate or documentation of completion is awarded to a participant who successfully completes the requirements for the individual education activity.

The certificate or document must include:

1. Name of learner;
2. Name of the provider of the educational activity;
3. Address of the provider of the educational activity (web address acceptable);
4. Title of the educational activity;
5. Activity date;
6. Number of contact hours awarded;
7. Official Approval statement

*(Do not include the expiration of approval period on the Certificate of Completion)*

**Commercial Support** (AHNA Application VIII, Section D)

Please see page 13 of this manual for in depth discussion of Commercial Support

**Joint Providership** (AHNA Application VIII, Section E)

Please see page 14 of this manual for in depth discussion of Joint Providership

**Recordkeeping** (AHNA Application IX)

ANCC requires that records must be securely maintained for a period of no less than seven (7) from the date of expiration. For a detailed list of recordkeeping, see *(Appendix G: Individual Activity File Requirements)*

**Approved Program Directory Data Form** (AHNA Application X)

AHNA maintains a free directory that contains all educational activities approved by AHNA. This searchable directory connects learners with educational activities via a key word search. A completed Approved Program Directory Data Form must be submitted with the application packet.

*(Appendix H: Approved Program Directory Data Form)*
Withdrawal of an Application

Applicants may choose to withdraw an application at any point in the review process without prejudice toward future applications. There is no refund of application fees. All application materials and communication between the applicant and the AHNA are kept confidential and securely stored at AHNA Headquarters for a period of seven (7) years.

1. **Withdrawal Prior to Nurse Peer Review:**
   A. Applicant may withdraw the application from consideration by notifying the AHNA in writing.
   B. Application fees are not refunded, but may be applied if the application is resubmitted within three (3) months from the date of withdrawal.

2. **Withdrawal During or after Nurse Peer Review:**
   A. Applicant may withdraw the application from consideration by notifying the AHNA in writing.
   B. Application fees are not refunded.
   C. If application is resubmitted, it is treated as a new application and application fees are required.

Approval Period

The approval period for the educational activity is **two (2) years from the date that the AHNA issued the approval notice.** The activity can be repeated as often as desired during the two-year period.

Re-Approval of an Activity

ANCC requires that all program re-approval must adhere to a full application and approval process. Prior to the two-year approval period expiration date, the applicant can resubmit the activity for approval. This constitutes a new application process and fee. If the NPRL suggests improvements on the original application, these must be integrated into the new application. The approval process must be completed prior to awarding contact hours once the approval time has expired. Applicants must ensure that applications are submitted on current, up-to-date forms. Applicants must submit all application materials at least 60 days prior to expiration date in order to ensure continuous approval to award contact hours.

Appealing Denial of Approval

Applicants may appeal a Denial of Approval decision. In the event of an appeal, an Ad Hoc Appeals Committee will be convened to review the applicant's appeal.

1. Applicant sends a letter to the Nurse Peer Review Leader (NPRL) providing rationale for why the Denial of Approval should be reconsidered.
2. The Nurse Peer Review Leader (NPRL) convenes an Ad-Hoc Appeals Committee and forwards all application materials and communications to the members of this committee.

3. The Education Approver Unit Ad-Hoc Appeals Committee consists of three senior Nurse Peer Reviewers that have had at least 5 years of experience in reviewing applications. Only Nurse Peer Reviewers not involved in the original peer-review process for the application are eligible to serve on the Education Approver Unit Ad-Hoc Appeals Committee. The NPRL is not a member of the Ad-Hoc Appeals Committee.

4. Appeals Committee members review the information and send responses to the NPRL within five working days of receipt of packet.

5. If consensus cannot be reached by the Appeals Committee, the NPRL becomes involved in the process.

6. The NPRL notifies the Education Assistant within five days of the Appeals Committee decision.

7. The Education Assistant, working with the NPRL, notifies the applicant in writing of the Ad-Hoc Appeals Committee decision.

8. The Education Approver Unit Ad-Hoc Appeals Committee decision is final.

**Suspension or Revocation of Approval**

Approval status may be suspended or revoked for any of the following reasons:

1. Failure to comply and/or remain in adherence with the criteria, rules and requirements defined in the *AHNA Resource & Instruction Manual for Individual Educational Activity Applicants*

2. Investigation and verification of written complaints or charges made to the AHNA Education Approver Unit by consumers or others

3. Refusal to comply in an investigation of charges

4. Misrepresentation

5. Improper use of official approval statement

6. Failure to adhere to language and disclaimer policies

7. Failure to comply with AHNA/ANCC non-commercial policy

8. Failure to timely submit required/requested reports

Suspension and revocation are effective on the date the applicant receives the certified letter from the AHNA NPRL.

1. In the case of suspension, contact hours cannot be awarded until all of the conditions of suspension are met.

2. In the case of revocation, all statements regarding approval status must be removed from all marketing materials and certificates of attendance. Contact hours may not be awarded.

**Change in Approved Educational Activities**

The Nurse Planner is responsible for ensuring the completion of the evaluation, revision, and all recordkeeping of the individual educational activity. If during the ongoing evaluation process the NP determines that substantive revisions (e.g. change in Nurse Planner, additional or change in learning outcome, additional presenters/faculty) in the course is needed, a *Change of Course Form* and all
other required documents must be submitted to the AHNA for approval prior to offering the educational activity. *(Appendix I: Change of Course Form)*

### Conclusion

The AHNA EAC hopes that applicants find this *AHNA Resource & Instruction Manual for Individual Educational Activity Applicants* helpful in completing the application for approval to provide CNE for an individual educational activity. While questions/thoughts may arise during the process of application, the EAC believes that the information provides a solid foundation for applicants. As always, applicants are encouraged to contact the AHNA Education Assistant, Denise Beadles via email at eduassist@ahna.org or by phone at or 800-278-2462; or the AHNA Nurse Peer Review Leader, Deb Shields, at DEBSHIELDS@aol.com

The AHNA EAC would like to thank the American Nurses Credentialing Center for their support during the development of this resource. Materials within this manual have been drawn largely, with permission, from the 2015 ANCC Primary Accreditation Approver Application Manual. Silver Springs, Md.: American Nurses Credentialing Center. © American Nurses Credentialing Center. All rights reserved. Reproduced with permission by the American Nurses Credentialing Center.
Glossary

The information included in this Glossary is used with permission and drawn largely from the 2015 ANCC Primary Accreditation Approver Application Manual, pp 53 – 58.

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

**Accreditation:** The voluntary process by which a nongovernmental agency or organization appraises and grants accredited status to institutions and / or programs or services that meet predetermined structure, process, and outcome criteria (time-limited).

**Accredited Approver:** An eligible organization credentialed by ANCC after having submitted to an in-depth analysis to determine its capacity to assess and monitor other organizations’ compliance with ANCC accreditation criteria that support the provision of quality CNE activities, and to assess and monitor applicants’ compliance with ANCC accreditation criteria as Approved Providers (C/SNA and FNS only) and Individual Educational Activity Applicants (C/SNA, FNS, and SNO). AHNA is a Specialty Nursing Organization (SNO) and is accredited only to approve Individual Educational Activity Applications.

**Advertising Materials:** Method of announcing an educational activity. This may include a brochure, flyer, bulletin board announcement, newsletter, memo, email, intranet posting, electronic message, or website.

**American Nurses Credentialing Center (ANCC):** The mission of the American Nurses Credentialing Center (ANCC), a subsidiary of the American Nurses Association (ANA), is to promote excellence in nursing and health care globally through credentialing programs. ANCC's internationally renowned credentialing programs certify and recognize individual nurses in specialty practice areas. It recognizes healthcare organizations that promote nursing excellence and quality patient outcomes, while providing safe, positive work environments. In addition, ANCC accredits healthcare organizations that provide and approve continuing nursing education. It also offers educational materials to support nurses and organizations as they work toward their credentials. ANCC was incorporated in June 1990.

**Approver Unit:** Comprises the members of an organization who support the approval of other organizations and / or continuing nursing education activities.

**Best Available Evidence:** Choosing evidence based on an evidence hierarchy, with higher levels of the hierarchy consistent with a stronger evidence base (Polit and Beck, 2014).

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

**Biographical Data Information:** Required from Nurse Planners and content experts for Individual Educational Activity Applications. The data provided should document these individuals’ 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 producing, marketing, reselling, or distributing health care 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 health care goods or services consumed by or used on patients. Or an entity that advocates for use of the products or services of commercial interest organizations. Exceptions are made for nonprofit or government organizations and non-health-care-related companies.

**Commercial Support:** 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. Providers of commercial support may not be providers or joint 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 CNE. The COA is composed of at least nine members selected from CNE stakeholder communities and represent expertise from across the field of continuing education, including academia, educational companies, domestic and international nursing associations, and governmental organizations.

**Conflict of Interest:** An affiliation or relationship of a financial nature with a commercial interest organization that might affect a person's ability to objectively participate in the planning, implementation, or review of a learning activity.

**Contact Hour:** A unit of measurement that describes sixty minutes of an organized learning activity. One contact hour = sixty minutes. NOTE: Do Not use CEU. 1 CEU = 10 CNE contact hours.

**Content:** Subject matter of an educational activity that is based on the best available evidence and reflects the desired learning outcomes.

**Content Expert:** An individual member of the planning committee who has appropriate subject matter expertise for the educational activity being offered.

**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, bias, and any other aspects of the activity that may require evaluation.

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

**Education Assistant:** The Education Assistant provides support to the Nurse Peer Review Leader (NPRL) and the Nurse Peer Reviewers (NPR) to accomplish the daily, quarterly and annual goals of the unit. The Education Assistant manages the activities for the AHNA Education Approver Unit while maintaining records within ANCC guidelines and is the primary point of contact for applicants.

**Eligibility:** An applicant's ability to meet the requirements established by ANCC as a prerequisite to submitting an individual educational activity application for approval.

**Evaluation—Formative:** Systematic evaluation in the process of curriculum construction, teaching, and learning for the purpose of improving any of these three processes (Bloom et al, 1971).
Evaluation—Summative: Samples the entire range of outcomes associated over a long period and assesses student mastery of those skills (Bloom et al., 1971).

Evidence-based Practice: Applying the best available research results (evidence) when making decisions about health care. Health care professionals who perform evidence-based practice use research evidence along with clinical expertise and patient preferences. Systematic reviews (summaries of healthcare research results) provide information that aids in the process of evidence-based practice (http://effectivehealthcare.ahrq.gov/index.cfm/glossary-of-terms).

Gap Analysis: The method of identifying the difference between current knowledge, skills, and/or practices and the desired best practices.

In-kind Support: Nonmonetary support (e.g., marketing assistance, meeting room, event registration assistance) provided by the giver to the taker. (In the accreditation community, the “taker” is the provider of CNE.)

Interprofessional Education (IPCE): Education that occurs when members from two or more professions learn with, from, and about each other to enable effective collaboration and improve health outcomes (www.jointaccreditation.org).

Joint Providership: Planning, developing, and implementing an educational activity by two or more organizations or agencies.

Jointly Provided Activities: Educational activities planned, developed, and implemented collaboratively by two or more organizations or agencies.

Learner Engagement: Instructional methods and techniques that are in accord with principles of adult learning.

Advertising Materials: Method of announcing an educational activity. This may include a brochure, flyer, bulletin board announcement, newsletter, memo, email, intranet posting, electronic message, or website.

Multi-focused organization (MFO): An organization that exists for more than the purpose of providing CNE.

Needs Assessment: The process by which a discrepancy between what is desired and what exists is identified.

Nurse Peer Reviewer (NPR): A registered nurse who holds a current, unencumbered license (or international equivalent) and a baccalaureate degree or higher in nursing (or international equivalent) who is actively involved in evaluating each Approved Provider or Individual Educational Activity Applicant to evaluate adherence to the ANCC criteria.

Nurse Peer Review Leader (NPRL): A registered nurse who holds a current, unencumbered nursing license (or international equivalent) and a graduate degree, with either the baccalaureate or graduate degree in nursing (or international equivalent), who has the authority within the organization to evaluate adherence to the ANCC Primary Accreditation Program criteria in the approval of CNE.
**Nurse Planner**: A registered nurse who holds a current, unencumbered nursing license (or international equivalent) and a baccalaureate degree or higher in nursing (or international equivalent) who is actively involved in all aspects of planning, implementation, and evaluation of each CNE activity. The Nurse Planner is responsible for ensuring that appropriate educational design principles are used and processes are consistent with the requirements of the ANCC Primary Accreditation Program.

**Nursing Professional Development**: A specialized nursing practice that facilitates the professional development and growth of nurses and other health care personnel along the continuum from novice to expert.

**Outcome Measurement**: The process of observing, describing, and quantifying the predefined indicator(s) / outcome(s) of performance after an intervention designed to impact the indicator / outcome.

**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 expert). NOTE: One individual may serve both roles, but there must still be a second planner.

**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. The individual’s spouse / partner’s financial relationship with any commercial interest is also considered a relevant relationship.

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

**Target audience**: The group for which an educational activity has been designed.
References / Resources

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Western Multi-State Division (MSD) http://www.westernmsd.org/
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*Note: all documents in the Appendices can be downloaded as separate Word documents from the AHNA website [http://www.ahna.org/Education/Approval-CNE-Process](http://www.ahna.org/Education/Approval-CNE-Process)*
### Commercial Support Agreement - Individual Educational Activity

A commercial interest, as defined by the American Nurses Credentialing Center (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, government organizations, non-healthcare-related companies, and healthcare facilities are not considered commercial interests.

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.

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

<table>
<thead>
<tr>
<th>Title of Educational Activity:</th>
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<tr>
<td>Name of Commercial Interest Organization:</td>
<td>Name of Individual Educational Activity Applicant/Provider:</td>
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<tr>
<td>Total Amount of Monetary Commercial Support:</td>
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**Total Dollar Value of In-Kind Support:**

**Complete description of all Commercial Support provided including both financial and in-kind support:**

Please check all that apply:

- [ ] Unrestricted
- [x] Restricted*
  - [ ] Speaker honoraria
  - [ ] Speaker expenses
  - [ ] Meal
  - [ ] Other (please list):

*The Commercial interest may request that funds be used to support a specific part of an educational activity. The Individual Educational Activity Applicant may choose to accept the restriction or not accept the commercial support. The Individual Educational Activity Applicant maintains responsibility for all decisions related to the activity as described below.

<table>
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<tr>
<th>Terms and Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. All organizations must comply with the ANCC Content Integrity Standards for Industry Support in Continuing Educational Activities.</td>
</tr>
<tr>
<td>2. This activity is for educational purposes only and will not promote any proprietary interest of a Commercial Interest Organization (CIO) providing financial or in-kind support.</td>
</tr>
<tr>
<td>- The CIO will not recruit learners from the educational activity for any purpose</td>
</tr>
<tr>
<td>3. The Individual Educational Activity Applicant is responsible for all decisions related to the educational activity. The Commercial Interest Organization providing financial or in-kind support may not participate in any component of the planning process or implementation of an educational activity, including:</td>
</tr>
<tr>
<td>- Assessment of learning needs and professional practice gap</td>
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<tr>
<td>- Learning outcomes</td>
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</table>
4. The Individual Educational Activity Applicant will make all decisions regarding the disposition and disbursement of commercial support in accordance with AHNA and ANCC approval criteria.

5. All commercial support associated with this activity will be given with the full knowledge and approval of the Individual Educational Activity Applicant. No other payments shall be given to any individuals involved with the supported educational activity.

6. Commercial support will be disclosed to the participants of the educational activity.

7. 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.

**Statement of Understanding**

Completion of the form below serves as the electronic signatures of the representatives duly authorized to enter into agreements on behalf of the organizations listed and indicates agreement of the terms and conditions listed in the Commercial Support Agreement above.

<table>
<thead>
<tr>
<th>Individual Educational Activity Applicant/Provider Name:</th>
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<tbody>
<tr>
<td>Address:</td>
<td></td>
</tr>
<tr>
<td>Name of Representative:</td>
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<tr>
<td>Email Address:</td>
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<tr>
<td>Phone Number:</td>
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<td>Fax Number:</td>
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</table>

**Electronic Signature (Required) Date:** [Click here to enter a date.]

**Completed and Signed by:**
(Name and Credentials)

<table>
<thead>
<tr>
<th>Commercial Interest Name:</th>
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<td>Address:</td>
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<td>Name of Representative:</td>
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**Electronic Signature (Required) Date:** [Click here to enter a date.]

**Completed and Signed by:**
(Name and Credentials)
Appendix B
(Optional Resource)

Joint Provider Agreement - Individual Educational Activity

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

The Individual Educational 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 ANCC accredited or approved, one will act as the provider of the educational activity and the other(s) will act as the joint provider(s).

A qualified Nurse Planner from the Individual Educational Activity Applicant organization must be involved in planning, implementing and evaluating the educational activity to include: developing outcomes and content, selecting planners, presenters, faculty, authors and/or content reviewers, awarding contact hours, recordkeeping procedures, developing evaluation methods and managing commercial support and/or sponsorship. Decision-making responsibility may be shared collaboratively between the Individual Educational Activity Applicant and the joint providing organization(s); however, final responsibility rests with the Individual Educational Activity Applicant when awarding ANCC contact hours.

The Individual Educational 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 provider that includes the following:

- Name of Individual Educational 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 outcomes and content
  - Selecting planners, presenters, faculty, authors and/or content reviewers
  - Awarding of contact hours
  - Recordkeeping procedures
  - Evaluation methods
  - Management of commercial support
- Name and signature of the individual legally authorized to enter into contracts on behalf of the Individual Educational Activity Applicant
- Name and signature of the individual legally authorized to enter into contracts on behalf of the joint provider(s)
- Date the agreement was signed
AGREEMENT FOR JOINT PROVIDING A CONTINUING EDUCATION ACTIVITY

This educational activity is being joint provided by (Name of Individual Educational Activity Applicant/Provider) and (Name of Joint Provider).

Title of Activity: __________________________________________
Date(s): __________________________________________
Total Number of Contact Hours: __________________________________________

Individual Educational Activity Applicant Nurse Planner’s Name: __________________________________________

Each item must be checked to reflect the appropriate responsibility. Those items indicated as “Required” are the responsibility of the Individual Educational Activity Applicant.

<table>
<thead>
<tr>
<th>Responsibilities</th>
<th>Individual Educational Activity Applicant</th>
<th>Joint Provider Name</th>
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<tbody>
<tr>
<td>• Determining educational outcomes and content</td>
<td>Required</td>
<td>☐</td>
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<tr>
<td>• Selecting planners, presenters, faculty, authors and/or content reviewers</td>
<td>Required</td>
<td>☐</td>
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<tr>
<td>• Determining appropriate number of and awarding ANCC contact hours</td>
<td>Required</td>
<td>☐</td>
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<td>• Recordkeeping procedures</td>
<td>Required</td>
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<td>• Evaluation method</td>
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<tr>
<td>• Management of commercial support</td>
<td>Required</td>
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Other items (suggestions only):

• Marketing  ☐  ☐
• Printing  ☐  ☐
• Registration  ☐  ☐
• Supplies: List:  ☐  ☐
• Physical location  ☐  ☐
• Audio-visual supplies  ☐  ☐
• Food  ☐  ☐
• Other:  ☐  ☐
• Other:  ☐  ☐
• Other:  ☐  ☐
• Other:  ☐  ☐

Financial considerations are often not part of the joint provider agreement. However, there may be decisions related to costs or revenue and those can be included below. If exchange of money is included as part of the agreement, it is recommended that the financial arrangements be stipulated in the joint provider agreement. Jointly providing an educational activity is a collaborative venture that requires the direct involvement of the Nurse Planner. Contact Hours may not be purchased.
FINANCIAL AGREEMENT

The following is a description of financial responsibilities of the Individual Educational Activity Applicant and the joint provider(s):

1. __________________________________________________________________________
2. __________________________________________________________________________
3. __________________________________________________________________________
4. __________________________________________________________________________
5. __________________________________________________________________________

**Individual Educational Activity Applicant** Representative:

Name __________________________________________________________________________
Official title

*Signature of Individual Educational Activity Applicant Representative* __________ Date

Individual Activity Name/Agency: __________________________________________________________________________

Address: __________________________________________________________________________

Phone: ______________ Email address: __________________________________________________________________________

**Joint Provider** Representative:

Name __________________________________________________________________________
Official title

*Signature of Joint Provider Representative* __________ Date

Joint Provider Name/Agency: __________________________________________________________________________

Address: __________________________________________________________________________

Phone: ______________ Email address: __________________________________________________________________________

*Electronic/typed signature is acceptable
## GAP ANALYSIS WORKSHEET for INDIVIDUAL EDUCATIONAL ACTIVITIES

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Resource and Instruction Manual for individual Educational Activity Applicants, January 2020
Appendix D

Sample Agenda and CNE Calculation

Envisioning Healing through Reflective Practice:
Informing Healthcare Practice, Research and Education

April 26, 2014

7:30 – 7:50   Registration (Non CNE)

7:50 – 8:00   Welcome & Introductions (Non CNE)

8:00 – 9:30   Reflections on Healing and Healing Practices Through Dialogue (90)

9:30 – 9:45   Break (Non CNE)

9:45 – 10:45  Ethnographic Research as Reflective Practice:
Listening in End-of-Life Spaces (60)

10:45 – 12:00 Aesthetic Expressions: The Transformation from Focused to Community
Dialogue (75)

12:00 – 1:30  Lunch on your own (Non CNE)

1:30 – 2:45   Aesthetic Expressions: The Transformation from Focused to Community
Dialogue (continues) (75)

2:45 – 3:00   Break (Non CNE)

3:00 – 4:30   Critical Reflective Inquiry (90)

4:30 – 4:40   Questions and Evaluation (10)

4:40 – 5:15   Therapeutic Touch International Association, Inc. (TTIA)
Business Meeting (Non CNE event)

6:00    Join the TTIA Board for dinner at TAT (Non CNE event)

TOTAL CNE = 400 minutes divided by 60 = 6.6 CNE Contact Hours
Appendix E

Mergener Formula

MERGENER FORMULA by Stephen Z. Fadem, M.D., FACP, FASN

\[0.9 \times [-22.3 + (0.00209 \times w) + (2.78 \times q) + (15.5 \times d)]\]

- NUMBER OF WORDS \( w \) = 47000
- NUMBER OF QUESTIONS \( q \) = 100
- DEGREE OF DIFFICULTY \( d \) = 3

NUMBER OF MINUTES = 360
NUMBER OF HOURS = 6

Very Easy 1
Somewhat Easy 2
Moderate 3
Difficult 4
Very Difficult 5

RESOURCES FOR ONLINE LEARNING:


http://www.fda.gov/cder/mapp/4550.5R.pdf


Accreditation Council for Continuing Medical Education (ACCME®) - http://www.accme.org/

American Nurses Credentialing Center (ANCC) - http://www.nursecredentialing.org/

SCORM® from Advanced Distributed Learning (ADL)

*excludes tables and charts
## Appendix F

### Sample Disclosure Outline

Outline for required Disclosure to Learners to be included in the confirmation letter or other pre-event communication, posted clearly at the registration table, or at the beginning of activity via handout or the first slide of the first PowerPoint presentation. These must be provided in writing to the learner before the beginning of the educational content. The disclosures must include items 1-4 and 5-6 if applicable.

<table>
<thead>
<tr>
<th>Required area of information to be Disclosed</th>
<th>Suggested (or required-as indicated) wording of disclosure to be included in the handout or first slide of PowerPoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Title of the Course</td>
<td>Must be exactly as it appears on the application for approval</td>
</tr>
<tr>
<td>2. Criteria for Successful Completion</td>
<td>Insert participant requirements to receive contact hours</td>
</tr>
<tr>
<td>3. Conflict of Interest</td>
<td>MUST CHOOSE ONE and delete the others:</td>
</tr>
</tbody>
</table>
| Presence or absence of conflict of interest for all individuals in a position to control content (e.g. planners, presenters, faculty, authors and content reviewers) | This educational activity does not include any content that relates to the products and/or services of a commercial interest that would create a conflict of interest.  
OR  
No individuals in a position to control content for this activity has any relevant financial relationship to disclose.  
OR  
The following individuals in a position to control content for this activity declare they have a commercial interest relationship relevant to the content of this activity and it has been resolved with the nurse planner. 
(Name) (insert they type of relevant financial relationship and name of commercial interest entity) 
Examples:  
Ann Jones, RN is on the speakers Bureau for XYZ Company  
John Smith owns stock in ABC company |
| 4. Commercial Support                       | MUST CHOOSE ONE and delete the others:                                                                        |
| (Insert Name of Commercial Interest) provided financial or in-kind support for this activity. | (Insert Name of Commercial Interest) provided financial or in-kind support for this activity.  
OR  
There is no commercial support being received for this event. |
| 5. Official Approval Statement              | This continuing professional development activity was approved by the American Holistic Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation. |
| **This statement must not be altered.**    |                                                                                                               |
| 6. AHNA Non-endorsement of Modality Statement. | Approval for contact hours through the American Holistic Nurses Association is based on an assessment of the educational merit of this program and does not constitute endorsement of the use of any specific modality in the care of clients. |
| **This statement must not be altered.**    |                                                                                                               |
| 7. Expiration Date for Enduring Materials (learner paced activities) if applicable | Origination date: (Insert approval date)  
Expiration date: (Insert date-2 years from approval date) |
| 8. Joint Provider(s) if applicable          | This activity is being jointly provided by [Insert Applicant’s Organization Name] and [insert Joint Provider Organization’s name(s)]. |

Template has been developed and informed from the Western Multi-State Division (MSD) http://www.westernmsd.org/
Appendix G

Individual Activity File Requirements:

This is a list of the items that are required records that must be securely stored for a minimum of seven (7) years

Individual Activity Application

- Assessment of applicant eligibility - commercial interest
- Assessment of applicant eligibility – nurse planner license and baccalaureate degree confirmed

Contents of activity file

- Title and location 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 professional practice gap
- Evidence that validates professional practice gap
- Educational need that underlies the professional practice gap
- Description of target audience
- Desired learning outcomes
- Description of evidence-based content with supporting reference or resources
- Learner engagement strategies used
- Criteria for awarding of contact hours
- Description of evaluation process (how evidence that change in knowledge, skills, &/or practices of target audiences was assessed)
- Names and credentials of all individuals in a position to control content (must identify who fills the roles of Nurse Planner and content expert(s)).
- Conflict of interest disclosure documentation from all individuals in a position to control content (planners, presenters, faculty, authors, and/or content reviewers), if applicable.
  - Name of individual
  - Past 12 months
  - Spouse/significant other
- Evidence of a COI resolution process, if applicable
- Number of contact hours awarded for activity and method of calculation
- If the activity is longer than 3 hours, a copy of the agenda must be maintained in the file.
- Documentation of completion &/or certificate 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
  - Activity approval statement
  - Participant name
- Commercial Support Agreement with signature and date (if applicable)
  - Name of the Commercial Interest Organization (CIO)
• Name of the Provider
• Complete description of all the CS provided, including both financial and in-kind support
• Statement that the CIO will not participate in planning, developing, implementing or evaluating the educational activity
• Statement that the CIO will not recruit learners from the education activity for any purpose
• Description of how the CS must be used by the Provider (unrestricted use &/or restricted use)
• Signature of a duly authorized representative of the CIO with the authority to enter the binding contracts on behalf of the CIO
• Signature of a duly authorized representative of the Provider with the authority to enter the binding contracts on behalf of the Provider
• Date on which the written agreement was signed

● Evidence of disclosing to the learner:
  • Activity approval statement
  • Criteria for awarding contact hours
  • Presence or absence of conflicts of interest for all individuals in a position to control content (planning committee, presenters, faculty, authors, and/or content reviewers)
  • Commercial support (if applicable)
  • Expiration date (enduring material only)
  • Joint Providership (if applicable)

● Materials associated with this activity (marketing materials, advertising agendas, and certificates of completion) must clearly indicate the Provider awarding contact hours and responsible for adherence to the ANCC criteria
Appendix H

AHNA Website

Approved Program Directory Data Form

This document is to be submitted with the application for approval.

All approved educational activities are included in a searchable directory on the AHNA website. This directory is open to all website viewers. The information you provide should be directed to potential registrants. This listing is included with the application fee, and remains on the directory for the duration of the approval period. Other marketing options through AHNA can be found at http://www.ahna.org/Home/Advertise. The following information will be automatically populated to the listing from the information provided in the application:

- Title (as provided on application #3)
- AHNA approval number (assigned)
- Number of approved CNE contact hours (application #5 subject to approval)
- Expiration of the current approval period (from Approval letter)

Contact Information

If your organization has a specific person designated for potential participants to call with questions that is different than the information provided in Section 1 of the Application, please indicate as directed below:

☐ Check if all info is the same as #1 on Application, if not then complete the following data with any different information you wish to be posted on the directory. The directory only allows for one contact listing.

1. Name of contact person*
   Telephone:
   Email Address:
   Website:

   *if the contact person is not the applicant, or primary contact person designated in section 1 of the application for the activity and they are not already in the AHNA database, a contact record will be created using information provided for this activity to be linked to the Approved Program Directory.

Provide at least 5 key words relevant to the gaps, outcomes, or content of this educational activity that can be used in a keyword search of the directory. It is recommended to use focused key words rather than general terms like “holistic” or “nursing”, which are automatically implied within the context of the AHNA website.

Provide brief description of the program to be included in the directory listing. The description must not be promotional of any other material. ANCC prohibits solicitations in conjunction with educational content. It is recommended to include information related to the general content and it is helpful for learners to know what they will be able to know or do differently as a result of participation in the class. The programing does not allow for special formatting so it will appear in plain text format on the directory. Enter you program description below.
Appendix I

American Holistic Nurses Association
2900 SW Plass Ct, Topeka, KS 66611-1980 ● (800) 278-2462 ● Fax: (785) 234-1713
approval@ahna.org ● www.ahna.org

CHANGE IN COURSE FORM
For AHNA Approved Individual Educational Activity

Program Title: _____________________________

AHNA Approval Number: _______________________________

Contact Person: _____________________________
   Phone: _____________________________________________
   Email: ______________________________________________

What will you be changing or adding?

☐ Contact information for Activity
☐ Changing Nurse Planner
☐ Title or description of the Activity
☐ Adding or removing Presenters
☐ Presentation related Changes
   ☐ One or more learning outcomes (see Note below)
   ☐ Amending agenda/Schedule
   ☐ Adding/changing Methodology/Teaching methods
   ☐ Adding/changing Successful completion requirements
   ☐ Adding/Changing Evaluation components
   ☐ Adding/changing Commercial Support or Sponsorship
☐ Other - Describe:

Note: All documentation impacted by the requested changes must be revised and submitted for approval before changes are implemented.

Please explain each change to the activity; listing the old then the new information (attach any revised material):

Please contact AHNA Education Assistant at approval@ahna.org for any question related to the Change in Course form.
AHNA Response: