Nurse Planner Orientation

Eastern Maine Medical Center Clinical Education Provider Unit

August 2016
What is a Nurse Planner?

• A nurse that is actively involved in the planning, implementation, and evaluation of Continuing Nurse Education (CNE), responsible for ensuring appropriate educational design principles are used and processes are consistent with ANCC requirements.
What are the Requirements of a Nurse Planner?

• “A licensed RN with a BS or higher in Nursing who is actively involved in all aspects of planning, implementation, and evaluation of CNE activities” (NEMSD)

• Has experience in the field of adult learning (e.g., involved in training staff r/t job, engagement on CNE planning committees, higher education teaching experience, etc.)
CNE- Continuing Nurse Education

- “Learning activities that are intended to build upon the educational and experiential bases of the professional RN for the enhancement of practice, education, administration, research, or theory, to improve the health of the public and the RNs’ pursuit of their professional career goals” (NEMSD)

- CNEs may also be referred to as CEUs, however these terms are not interchangeable
Contact Hours

• Unit of measure of a CNE learning activity; required for performance evaluations and certifications, and in some states, to maintain licensure

• All CNE activities for which contact hours are awarded must be approved by the ANCC or through an ANCC Accredited Approver
What is ANCC?

• American Nurses Credentialing Center- a subsidiary of ANA- American Nurses Association

• ANCC is a credentialing body that serves many functions- Magnet accreditation, specialty certifications, etc.

• Also accredits organizations to provide contact hours for CNE

• A symbol of quality, ANCC exists to promote and protect nursing excellent and quality patient outcomes (ANCC)
NE-MSD: New England Multi-State Division

- Maine is part of a multi-state organization that operates as an ANCC Accredited Approver

- NE-MSD accredits EMMC Clinical Education Department to be a provider of ANCC-approved CNE for contact hours

- EMMC Clinical Education Department ensures that all CNE delivered is in adherence with ANCC best-practice guidelines to ensure content integrity and quality of nursing education and practice
EMMC Clinical Education Department Provider Unit

Sandy Benton, MSN, RN, CCRN
Nurse Manager, Clinical Education

Staff Developers

Erica Caron, BSN, RN
Primary Nurse Planner
Staff Developer

Shelley Ryan, BSN, RN
Nurse Planner
Staff Developer

Emily Herrin, CAP
Office Coordinator

EMMC Nurse Planners

EMHS Affiliates

Sebasticook Valley Hospital
C.A. Dean Memorial Hospital
Maine Coast Memorial Hospital
Mercy Hospital
Blue Hill Memorial Hospital
The Aroostook Medical Center
Inland Hospital
CNE Provider Structure

ANA

ANCC

NEMSD

EMMC Clinical Education Provider Unit

Nurse Planners

High-quality Continuing Nursing Education
Nurse Planner Role: Plan

First, think about your Purpose…
What is the education that is going to be provided and why are you doing it? What will the impact be on nursing, nursing practice, or the patient?
Nurse Planner Role: Plan

Needs Assessment-
What information do you have to support the need for this education?

• Quality data, requests, literature trends
• Drives your purpose
Nurse Planner Role: Plan

Gap Analysis:
- What specific gaps are you trying to address? What is the deficit in...
  - Knowledge
  - Skills
  - Practice
- Supported by the needs assessment
Nurse Planner Role: Plan

Objectives-
What do you hope the learner will accomplish as a result of the education?

• Should be practical and attainable
• Single action verb that defines the behavioral outcome of the objective- use Bloom’s Taxonomy
Objectives

Bloom's Taxonomy

- **Remember**
  - Recall facts and basic concepts
    - define, duplicate, list, memorize, repeat, state

- **Understand**
  - Explain ideas or concepts
    - classify, describe, discuss, explain, identify, locate, recognize, report, select, translate

- **Apply**
  - Use information in new situations
    - execute, implement, solve, use, demonstrate, interpret, operate, schedule, sketch

- **Analyze**
  - Draw connections among ideas
    - differentiate, organize, relate, compare, contrast, distinguish, examine, experiment, question, test

- **Evaluate**
  - Justify a stand or decision
    - appraise, argue, defend, judge, select, support, value, critique, weigh

- **Create**
  - Produce new or original work
    - design, assemble, construct, conjecture, develop, formulate, author, investigate
<table>
<thead>
<tr>
<th>LEVEL</th>
<th>VERBS AND SAMPLE OBJECTIVES</th>
<th>EXAMPLES OF DISCUSSION QUESTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>REMEMBER</td>
<td>Arrange, Define, Describe, Detail, Draw, Duplicate, Identify, Indicate, Inventory, Label, List, Locate, Match, Name, Outline, Pick, Point, Pronounce, Quote, Recall, Recite, Recognize, Record, Relate, Repeat, Reproduce, Restate, State, Underline</td>
<td>Who was the first president of the United States? What is the definition of a mammal? When was the Declaration of Independence signed? Where did the first battle of the Civil War occur?</td>
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<td>UNDERSTAND</td>
<td>Classify, Confirm, Contrast, Convert, Decipher, Defend, Designate, Differentiate, Equate, Estimate, Examine, Express, Extend, Extrapolate, Generalize, Give Examples, Group, Infer, Interpret, Liken, Order, Paraphrase, Predict, Reorder, Rephrase, Restate, Sort, Specify, Substitute, Tell, Translate</td>
<td>In history, who ruled as a dictator? What is an example of an adjective? Where does democracy differ from a dictatorship? When has one man been able to change history?</td>
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<tr>
<td>APPLY</td>
<td>Add, Allocate, Alter, Apply, Calculate, Change, Choose, Complete, Compute, Conduct, Coordinate, Demonstrate, Determine, Develop, Direct, Discover, Divide, Dramatize, Draw, Employ, Execute, Formulate, Gather, Graph, Make, Manipulate, Model, Multiply, Operate, Perform, Present, Provide, Recount, Report, Schedule, Show, Sketch, Subtract, Use, Utilize</td>
<td>How does the law of supply and demand explain the current increase in the price of fruit? Examine the graph and state how many trees were cut down to produce paper. Which events led to the start of the Civil War?</td>
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<td>Label the parts of the heart. Outline the steps in the writing process. List the steps taken to make a kite. Recite the Gettysburg Address.</td>
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<td>Defend your position about creating flat taxes. Give an example of an adjective. Contrast democracy and dictatorship. Re-state the role of project management in an organization.</td>
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<tr>
<td>LEVEL</td>
<td>VERBS AND SAMPLE OBJECTIVES</td>
<td>EXAMPLES OF DISCUSSION QUESTIONS</td>
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<tr>
<td>ANALYZE</td>
<td>Analyze, Appraise, Associate, Break Down, Criticize, Discern, Diagram, Discriminate, Dissect,</td>
<td>What is the relationship between probability and statistical analysis?</td>
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<td>Distinguish, Elect, Establish, Explain, Expound, Illustrate, Inspect, Profile, Question, Refute,</td>
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<td>Separate, Simplify, Subdivide, Summarize, Test</td>
<td>Why did the recession occur?</td>
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<td>Explain the ramifications of sexual harassment in the workplace.</td>
<td>How does... apply to...?</td>
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<td>CREATE</td>
<td>Assemble, Assimilate, Categorize, Collect, Combine, Compile, Compose, Condense, Construct,</td>
<td>Why does... work?</td>
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<td></td>
<td>Create, Design, Derive, Detail, Devise, Elaborate, Expand, Generate, Guide, Hypothesize,</td>
<td>How does... relate to...?</td>
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<td>Integrate, Invent, Manage, Modify, Originiate, Organize, Plan, Prepare, Prescribe, Produce,</td>
<td>What distinctions can be made about... and...?</td>
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<td>Propose, Rearrange, Reconstruct, Reorganize, Rework, Set Up, Simplify, Specify, Synthesize,</td>
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<td>Theorize, Transform, Write</td>
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<td>EVALUATE</td>
<td>Argue, Assess, Attack, Champion, Compare and Contrast, Conclude, Critique, Debate, Decide,</td>
<td>What would happen if...?</td>
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<td>Deduce, Diagnose, Evaluate, Forecast, Improv, Judge, Justify, Measure, Prioritize, Prove,</td>
<td>How can we improve...?</td>
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<td>Rank, Rate, Recommend, Resolve, Revise, Score, Select, Solve, Support, Value, Verify, Weigh</td>
<td>How can we solve...?</td>
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<td>Support the value of diversity in a project team.</td>
<td>How many ways can you...?</td>
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<td>Recommend a course of action for a comprehensive organizational change.</td>
<td>How do the data support...?</td>
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<td>Resolve ethical issues that plague researchers conducting experiments on animals</td>
<td>What hypotheses can you develop based on the data?</td>
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<td>Why?</td>
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Nurse Planner Role: Plan

Other Logistics-

• Planning Committee- must have at least a nurse planner and one other person involved in the planning to ensure content integrity.

• Plan for space, time, facilitators/presenters, etc.

• Coordinate with providers of inter-disciplinary credits (CME, MA, etc.)
Nurse Planner Role: Plan

Paperwork

- Can be found on EMMC Internal Education Services site and the EMMC Internet site

- All required paperwork must be submitted a minimum 30 days prior to the event

- All paperwork must be submitted together in one email with a completed planning checklist

- All forms must be typed, cannot be handwritten

- Send to clincaleducation@emhs.org and save a copy for yourself!
General Paperwork Requirements

• The clinical education office coordinator (Emily) will ensure all components have been submitted and will assign the file to a staff developer.

• If components are missing, you will be notified by the office coordinator. Once you have submitted the missing pieces, it will be assigned for review and approval.

• Once approved, you will be notified via email and given an activity number for the program.
General Paperwork Requirements

- To maintain content integrity, you must renew your file for recurring programs every 2 years- this means update and re-submit all paperwork via the clinicaleducation@emhs.org email address.
- This must be done 30 days prior to your first program date in the 2nd year.
- For example, your activity is approved September 21, 2016. You must submit new paperwork 30 days prior to your first program date in 2018.
- Recommend keeping a list of all your programs, activity numbers, and approval dates.
- Activity numbers include the year approved- “2016-14” means it was approved in 2016, and you will need to renew in 2018.
A few definitions before we start…

• Co-/Joint Provider
• Commercial Support
• Commercial Interest
• Sponsorship
• Enduring Materials

Please reach out to a staff developer before planning any program that meets any of the following criteria to ensure you are in compliance with ANCC requirements…
Co-/Joint Provider

• An activity that is planned, developed, and implemented by 2 or more organizations or entities.
• One of the organizations must be an approved provider of CNE and assume responsibility for the contact hour
• Must have a Joint-Provider Agreement form completed
Commercial Support

• Financial or in-kind (non-monetary) contributions given by a commercial interest which is used to pay all or parts of the costs of a CNE activity.
• These entities cannot be providers or co-providers of an educational activity.
• Any advertisements, exhibits, or giveaways from these entities must be separate in time and space from the activity
• Commercial Support Agreement required
Commercial Interest

• An entity (or an entity owned by an entity) that produces, markets, or distributes healthcare goods or services that are consumed by or used on patients.
• Exceptions include non-profit, government organizations, or non-healthcare related companies
Sponsorship

• Financial or in-kind contributions from an entity that does not meet the definition of a commercial interest
• Non-profit, government, non-healthcare related companies
• Also needs to be separated from the educational activity
• Sponsorship Agreement required
Enduring Materials

- “Non-live” activity
- Materials that may be used repeatedly and the learning can take place at any time
- Video, online tutorial, self-study
- Must do a pilot study to determine how long the activity takes to determine contact hours- indicate on Planning Form
- An evaluation, evaluation summary, and roster is still required
- **Must have a post-test to evaluate learning!**
Required Paperwork

- Planning Checklist
- Planning Form
- Planning Table
- COI Form (formerly known as the Bio Form)
- Agenda
- Evaluation
- Accreditation (Approval) Statement
- Disclaimer Statement
- Marketing Materials
- Post-tests or other evaluation material
Other Paperwork

• Optional:
  • Gap Analysis Worksheet

• If needed:
  • Joint Provider Agreement
  • Sponsorship Agreement
  • Commercial Support Agreement
So, to summarize some important points from the paperwork...
Planning Table

- Must list the objectives in measurable goals
- Need references listed, this is a must!
- Content outline doesn’t need to be overly-specific but enough to support the objective
COI (Bio) Form

• Need one for Nurse Planner & Content Expert listed on Planning Form (minimum required)
• Any other people who were part of the planning committee/team
• Any presenters or speakers
• May have a planning committee member who is also a speaker- only need 1 COI form but indicate both roles
• You may add speakers for recurring events over time, just send a bio form to your staff developer for that program prior to the event date
Agenda

• Must have for all programs- this is new
• Must outline times for each segment, to include introductions, breaks, lunch, evaluation and pre/post-test
• The content time on the agenda must be the same amount of time on the Planning table
• Time for introductions, breaks and lunch cannot be counted towards the total # of contact hours
• Time used for evals, Q&A, pre- and post-tests IS counted towards the contact hours as this is active learning time
Marketing Materials

• Flyer/brochure/email

• Must have accreditation statement and # of contact hours being offered
  – Do not release contact hours until approved by staff developer- can put “5 contact hours pending approval” if you need to send out before paperwork is approved, then send out updated flyer or put statement and final # of contact hours on agenda or PowerPoint

• The flyer ideally should also list at least one objective for the program.
Accreditation Statement

• Must be presented to participants BEFORE the start of the event- word for word!
• Include statement and # of contact hours
• Can present in different ways:
  – **Flyer**: do not release contact hours until approved by staff developer- can put “contact hours pending approval” if you need to send out before paperwork is approved, then send out updated flyer or put statement and final # of contact hours on agenda or PowerPoint
  – **Agenda or handout**: give out at start of program
  – **PowerPoint slide**: must have up at start of program
• May include other discipline’s accreditation statements on same form but must separate them (CME for example)
Disclaimer Statement

• Modify to include any real or perceived conflict of interest, commercial support, or sponsorship
• Can add other requirements for completion, such as a certain passing score on a post-test
• Example:

  Disclaimer Statement

  • Successful completion of this activity requires sign in to register, attendance at entire activity, and completion of/handing in the evaluation. Depending on the program, more may be required of the participant and will be defined in the program announcement.
  • Potential conflict of interest exists: Craig Gundersen, PhD., is a soybean industry-endowed professor and Executive Director of the National Soybean Research Laboratory.
  • Commercial support has NOT been received for this event.
  • This event is sponsored by EMMC, Education Department Provider Unit, and it has the responsibility for planning, content, evaluation, and execution of this educational activity.
  • If there is vendor support of this educational activity, it does not imply EMMC or ANA Maine approval or endorsement of any products.
Series Programs

• A series is a set of related educational activities that may be attended separately, but designed to all meet the same purpose and gaps

• **Examples:** Critical Care Course, Lecture Series, BFHI, Research Symposium- programs that will have multiple topics under a larger program

• You do not need a Planning Form for each activity, just separate planning tables, agendas, bios, evals, eval summary, and rosters

• Each sub-program will get it’s own activity number and contact hours assigned

• Attendees can earn contact hours for each individual session
Series Programs

• Please submit each new request for sessions within a series following the same process for new programs- 30 days prior via email to clinicaleducation@emhs.org

• Utilize planning checklist and indicate it’s a series (no Planning Form needed after the first one)
After the Program

• Submit to your staff developer who was assigned to the activity **within 30 days of completion** of the program

  • **Evaluation Summary**
  • **Attendance Tracking Sheet and Roster**
Evaluation Summary

• Need one for each date and activity #

• If you have multiple sessions in a program that are offering contact hours separately for each session, need a separate summary for each

• If the program is all the same activity # but multiple dates (such as tele class), can do one summary at the end of the program
Roster and Attendance Tracking Sheet

• Must use our roster that we provide, filled out completely (even for EMMC employees)

• Tracking sheet must be submitted, include activity # you were assigned for the program-helps us to ensure we credit the attendees to the correct course in HealthStream
Certificates

• We will send you a blank certificate with your activity number and approved file

• Do not give unless learner attended entire session and turned in an eval, as well as met any other criteria you established for successful completion
FAQs

• What if I am not a BSN?
  – You cannot be a nurse planner, however, you can be part of the planning committee and complete the paperwork, however if will need to be reviewed and signed by a BSN who has completed the nurse planner training.
FAQs

• What if I already have an existing program at EMMC- do I need to submit my forms through the new process?
  – For new programs or renewals, you must email to clinicaleducation@emhs.org.
  – For current programs, you may continue to email the roster and eval summary to Erica or Shelley.
FAQs

• I have a current program, do I need to re-do my paperwork?
  – No you will only have to renew the paperwork prior to the first class 2 years from the approval date
  – Example: Your activity is approved on July 2, 2016. You must submit new paperwork prior to your first class in 2018.
FAQs

• I have a current program at EMMC and I noticed the evaluation form is different, do I need to start using this one?
  – No you can continue to use your current evaluation form for the time being for current programs, but all new programs must use all the new forms
FAQs

• Do I need the accreditation statement and # of contact hours on both the flyer and agenda?
  – It must be in at least one place prior to the start of the program- typically people like to put on the flyer to promote the event and entice people to attend, but you may not know how many hours you have approved at that time.

  – You can indicate “contact hours pending” if you need to send out the flyer before the program is approved.

  – If you did not put the statement on the flyer or only put that the hours were pending, you will need to put on the agenda or a PowerPoint slide with the final number of approved contact hours.
FAQs

• Why do I need separate tables, evals, summaries, rosters, etc. for a series program, but I don’t for a course such as remote telemetry training that is also on different days?
  – To determine if you have a series course, ask yourself, is a person required to attend all sessions? A program like remote telemetry is essentially a single course broken up over several days due to the amount of material, and contact hours are not earned until you complete the entire course (partial credits are not awarded for any programs!).
  – A series program is set up so that all sessions are geared towards a common purpose/to meet a common gap, but learners can go to one and not another, and will get contact hours for each individual session attended.
FAQs

• What if I have a series program already approved, do I need to submit new sub-programs on the new forms?
  – Yes, all new submissions need to be on the new forms using the new process, including new segments of an established series program
FAQs

• Can an employee of Alaris Medical present about their updated equipment?
  – Yes then can, but you cannot issue contact hours. An employee of a commercial entity cannot be part of the planning or implementation of a CNE activity if the content is related to the product or service of that entity.
FYI's for current nurse planners

• An evaluation critique is no longer required on the evaluation summary

• An agenda is now required for all programs (not just those over 90 minutes) and must include all segments and breaks
Resources

Paperwork can be found at:

• EMMC Intranet site (THE HUB)- [Education Services page under Program Credits>CNE](http://emmc.org/Educational-Opportunities/Continuing-Nursing-Education-(CNE).aspx)

Resources

• NEMSD.org
  • Continuing Nursing Education>Frequently Asked Questions

• EMMC Staff Developers
  • Erica Caron- 973-7317 or ecaron@emhs.org
  • Shelley Ryan- 973-7313 or sryan@emhs.org
Next Steps…

• Erica will send you a Nurse Planner Bio Form (new NPs only at this time- will renew every 3 years- this is separate from nurse planner bio forms for each activity)

• Fill this out and return

• Start planning your first CNE event!
Questions?