

UT Southwestern Medical Center
Accredited Provider Unit
NCPD Nurse Planner Orientation
Session 6

11.03.022

Disclosure to Learners

UT Southwestern Medical Center is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation.

Requirements for successful completion:

- Attend the entire event
- Complete and submit the evaluation

Relevant Financial Relationships:

This is a non-clinical activity. Therefore, no relevant financial relationships with ineligible companies are needed for those involved with the ability to control the content of this activity.

Learning Outcome: After participating in this activity, 75% of the learners who complete the evaluation will self-report an increase in knowledge and intent to change nurse planner practice regarding the topic covered.

This activity provides 1.0 contact hour(s).

Recap Session 5

What do you recall from Session 5?

Recap Session 5

Content for NCPD Activity

- Based on best available evidence
- May need to engage a content reviewer
- Can we use previously developed content?

Recap Session 5

Active Learner Engagement

- Options for engaging learners?
 - Integrating opportunities for dialogue
 - Including time for self-check or reflection
 - Analyzing case studies of peer review
- Can be used as opportunity for formative assessment
 - Feedback provided in real-time can allow faculty to address gaps

Recap Session 5

Criteria for Awarding Contact Hours

- Options for awarding credit hours?
 - Attendance for a specified period of time
 - Completion/submission of evaluation
- Criteria should be based on the desired learning outcomes
- Required to show participants prior to content being delivered
- List what is required by the learner to receive credit

Recap Session 5

Evaluation

- Method determined by NP and Planning Committee
- Components and method of evaluation should be relative to the desired learning outcomes
- Include assessment of change in knowledge, skills, and/or practices
- Change in knowledge, skills, and/or practices may or may not occur based on a variety of factors
- Evaluation should assess for such change
- Evaluation may also include collecting data that reflect barriers to learner change
- Short or Long Term

Education Design Process Components

- ✓ Needs Assessment
- ✓ Professional Practice Gap
- ✓ Planning Committee
- ✓ Underlying Education Needs
- ✓ Target Audience
- ✓ Learning Outcomes
- ✓ Content for NCPD Activity
- ✓ Active Learner Engagement
- ✓ Criteria for Awarding Contact Hours
- ✓ Evaluation
 - Independence and Content Integrity
 - Commercial Support
 - How to Calculate Contact Hours

Agenda

- Independence and Content Integrity
- Ineligible Companies
- Integrity and Independence and Process
- Relevant Financial Relationship
- Identification and Evaluation
- Mitigation
- Commercial Support
- Ensuring Content Integrity in the presence of commercial support
- Vendor vs Commercial Support

Independence and Content Integrity

NCPD activities are:

- Designed to provide independent activities
- Rooted in identification of professional practice gaps and learning needs of target audience
- Ensure there is no commercial influence in planning and execution of activities

Ineligible Companies

- Any entity producing, marketing, selling, re-selling, or distributing healthcare goods or services consumed by or used on patients
- Any entity that is owned or controlled by an entity that produces, markets, re-sells, or distributes healthcare goods or services consumed by or used on patients

Exceptions

- Non-profit or government organizations, non-health care related companies, and healthcare facilities

Ineligible Companies

- Exclude owners/employees of ineligible companies from participating as planners/speakers unless one of the three exceptions apply:
 - When the content of the activity is not related to the business lines or products of their employer/company
 - When the content of the approved activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations
 - When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used
- Even though these exceptions exist – their financial relationship must still be disclosed to learners

Integrity and Independence Process

- Request financial relationships from everyone who has control over the activity content
- Exclude owners/employees from ineligible companies
- Identify financial relationships with ineligible companies within the last 24 months and if they are relevant
- Mitigate those people with relevant financial relationships
 - Record the mitigation strategy in the excel RFR form in the activity folder
- Disclose relevant financial relationships to learners
 - Clinical
 - Non-Clinical
 - Mitigation required (choose strategy)
 - Mitigation not required

When Financial Relationships not Needed

- Activity will only address a non-clinical topic
 - Leadership
 - Communication skills
- Activity is for a learner group that is in control of the content entirely
 - Spontaneous case conversation among peers
- Activity is self-directed
 - The learner will control their learning outcomes and report in resulting changes

Relevant Financial Relationship

Financial relationships are relevant if the following three conditions are met for the people who will control content of the activity:

- A financial relationship, in any amount, exists between the person in control of content and an ineligible company
- The financial relationship existed during the past 24 months
- The content of the education is related to the products of an ineligible company with whom the person has a financial relationship

Relevant Financial Relationship

- It is critical all individuals in a position to control content of an activity are provided with the definition of a commercial interest organization prior to disclosing relevant relationships.
- Relevant financial relationships are when the people who control or influence the content of the activity have a financial relationship with an ineligible company whose products or services are pertinent to the content of the activity.

Relevant Financial Relationship

The Nurse Planner:

- is responsible for identifying and mitigating conflicts of interest during the planning and implementation phases of an activity
- may engage the individual with the identified financial relationship to participate in the mitigation strategy process
- must be actively engaged in the mitigation process and is ultimately accountable for compliance
- responsible for informing learners of the presence or absence of financial relationships for all individuals in a position to control content of the activity

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

Identification and Evaluation

- STEP 1: Review collected information about financial relationships
 - exclude owners or employees of ineligible companies from participating as planners or faculty
- STEP 2: Determine relevant financial relationships
 - review the information for all persons whom you did not exclude in Step 1
 - determine whether each person's financial relationships with ineligible companies are relevant to the content of the education you are planning.
- STEP 3: Choose a mitigation strategy for each person who has a relevant financial relationship
 - implement that strategy before the person assumes their role
- Step 4: Review the relevant relationship spreadsheet in the activity file
 - document the mitigation strategy you used for each person with a relevant financial relationship
- Step 5: Disclose to learner
 - indicate presence or absence of relevant financial relationships for all persons in control of the content

Mitigation Strategies

- Necessary for each person who has a relevant financial relationship
 - implement that strategy before the person assumes their role
- You may select multiple strategies
 - use strategies appropriate to the role(s) that each person has
 - you can identify your own strategies for mitigation
- Document the mitigation strategies used

Mitigation Strategies for Planners

- Divest the financial relationship
- Recusal from controlling aspects of planning and content with which there is a financial relationship
- Peer review of planning decisions by persons without relevant financial relationships
- Other methods (please describe)

Mitigation Strategies for Faculty and Others

- Divest the financial relationship
- Peer review of content by persons without relevant financial relationships
- Attest that clinical recommendations are evidence-based and free of commercial bias
 - peer-reviewed literature
 - adhering to evidence-based practice guidelines
- Other methods (please describe)

Wrap Up

- Discussion
- Questions
- Next Steps for Series
- Next Steps for receiving contact hours