

Continuing Education Activity Development Guidance



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Overview

AffinityCE is an accredited continuing education provider for health care professionals and has been providing continuing education activities for more than 30 years. AffinityCE has a commitment to providing evidence-based, fair balanced, credibly referenced, compliant continuing education. This document will assist you in preparing content for CE activities. It is important that activities meet accreditation requirements, policies, and guidelines to be considered for continuing education credit.

Continuing Education Accreditation: Interdisciplinary Audience

This activity will provide accredited continuing education (CE) for multiple health professions. When developing content for an interprofessional audience, please consider content that is relevant to the educational needs of the widest possible audience.

Continuing Education Audiences

Health professions attending CE activities include the following. AffinityCE will provide continuing medical education (CME/CE) accreditation for the following professions:

Physicians	Accreditation Council for Continuing Medical Education (ACCME) <i>AMA PRA Category 1 Credit™</i>
Nurses	American Nurses Credentialing Center (ANCC)
Psychologists	American Psychological Association (APA)
Social Workers	National Association of Social Workers (NASW) (live event only)
Occupational Therapists	ACCME Non-Physician CE Credit
Physical Therapists	ACCME Non-Physician CE Credit
Rehabilitation Counselors	Commission on Rehabilitation Counselor Certification (CRCC)
Case Managers	Commission for Case Manager Certification (CCMC)
Speech-Language Professionals	American Speech-Language-Hearing Association (ASHA)

AffinityCE will also make available a statement of participation to all attendees completing the program evaluation.

In developing content for continuing education activities, faculty should keep in mind these health professionals. Additionally, it is important to be aware of the diversity in patient populations served by these health professionals, including underserved and minority populations. Faculty members are encouraged to develop content to meet the educational needs of the widest possible audience.

Continuing Education: Key Principles

Continuing medical education (CME) consists of educational activities that serve to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a health care professional uses to provide services for patients, the public, or the profession. The content of CME/CE is that body of knowledge and skills generally recognized and accepted by the profession as within the basic medical sciences, discipline of clinical medicine, and the provision of health care to the public.

A broad definition of CME/CE, such as the one found above, recognizes that all continuing educational activities that assist health care professionals in carrying out their professional responsibilities more effectively and efficiently are CME/CE.

Each continuing education activity should address certain key principles as delineated below. These principles are designed to enhance the awareness, knowledge, skills, and attitudes that a clinician needs to provide quality services to patients.

Course Content Rationale

Meet Educational Needs

What educational need is this activity designed to meet?

A program must meet the needs in the areas of the clinician's knowledge or competence or performance. The activity will increase the clinician's knowledge:

- Due to the lack of awareness in...
- By addressing the role of the clinician in disease prevention or treatment...
- Will impart new or improved methods for assessment, planning, and implementation...

Bridge Professional Practice Gaps

Which professional practice gap is this activity designed to address?

The continuing education activity will address gaps related to either the clinician's knowledge or competence or performance:

- Lack of awareness in...
- Inconsistencies with...
- Lack of contemporary knowledge in...

Achieve Improved Results and Outcomes

What is this activity designed to change?

The intended results of this continuing education activity are improvement in knowledge, providing or enhancing competencies which ultimately will lead to improved performance and patient care practices and overall health outcomes.

- Increase knowledge of...
- Impact the process of...
- Implementation of...
- Improves delivery of care for...

Fair Balance

The content or format of a CME/CE activity and its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial entity. A product or service must be presented in a fair and balanced manner with other similar products or services.

Presentations must give a balanced view of therapeutic options. Presenters should use scientific or generic names in referring to products in their lectures or enduring materials. Should it be necessary to use a trade name, then the trade names of all similar products within a class should be used.

Promotion

Presentations that promote a particular brand, device, treatment, or trade name over others in a category or contain logos of a specific brand cannot be accredited for continuing education.

CME/CE Content Validation

1. CME/CE is accountable to the public for presenting clinical content that supports safe, effective patient care.
2. The overall content of the activity must promote recommendations, treatment, or manners of practicing medicine that are reflective of generally accepted standard of care within the profession of medicine.
3. All recommendations involving clinical medicine in a CME/CE activity must be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients.
4. All scientific research referred to, reported, or used in CME/CE in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, and analysis.
5. All clinical recommendations must be based on “standard of care” for patients.
6. Recommendations must be based on evidence that is accepted within the profession of medicine as adequate justification for any indications and contraindications in the care of patients.
7. Data presented about the effects of any of recommended treatments or interventions must show results that are either a) clinically indistinguishable from a placebo or b) clinically indistinguishable from no intervention.

Information about off-label uses of approved products, unapproved product uses, nutrients, vitamins, and supplements

1. Disclosure must be made any time a product is mentioned, or information is provided about an unapproved use or unapproved use.
2. Information can be provided on studies and/or reports about unapproved product use or off label use of an approved product or products still in clinical trials, or evolving issues, but it must be presented as informational only. This information must be documented by generally accepted references. No conclusions, recommendations, or suggestions regarding therapy are to be presented or advocated. In these instances, any discussion must be noted as unapproved product information. An example: Nutrients, vitamins, and supplements, unless FDA approved for a therapeutic use, should not be recommended for therapeutic uses or purposes.

Active Learning Techniques

Continuing educational activities that health care professionals may engage must include active learning strategies to help learner engagement and knowledge retention.

- Case studies from practice-based settings and problem-solving techniques to help improve practice.
- Role play and simulation
- Team based learning and problem solving
- Small group learning
- Quizzes embedded in the live presentation to practice recall.

Learning Assessment Development and Rationale

Learner assessments may include group discussions, case presentations with explanation of correct answers supported by the clinical rationale and adequate references to support the correct response and encourage further study regarding the topic. Home based activities must also include the clinical rationale and adequate references to support the correct response, encourage further study and help support a deeper understanding and follow up questions if necessary.

Planning the Overall Agenda for the Activity

Live continuing education activities: Marketing, exhibits, and nonaccredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled as NON-CME, outlined and communicated as such.

Profession-specific CE Activity Development Criteria

Not all continuing educational activities that health care professionals may engage in are CME/CE. Health care professionals may participate in worthwhile continuing educational activities that are not related directly to their professional work, and these activities are not CME/CE. Continuing educational activities that respond to a non-professional educational need or interest, such as personal financial planning or appreciation of literature or music, are not CME/CE.

Certain disciplines require additional or special criteria when providing CME/CE. Please refer to the following sections for discipline-specific content development information.

Physicians

Continuing medical education activities can be developed to align with any one of the following core competencies.

Institute of Medicine Core Competencies

- Provide patient-centered care
- Work in interdisciplinary teams
- Employ evidence-based practice
- Apply quality improvement
- Utilize informatics

Accreditation Council for Graduate Medical Education Core Competencies

- Patient Care
- Medical Knowledge
- Practice-Based Learning and Improvement
- Interpersonal and Communication Skills
- Professionalism
- Systems-Based Practice

Nurses

Continuing education for nurses (CNE) involves systematic professional learning experiences designed to augment the knowledge, skills, and attitudes of nurses, and therefore enrich nurses' contribution to quality health care.

Continuing education for nurses must be applicable to nursing practice. A presentation that is accredited for physicians or another discipline may not be appropriate for continuing nursing education. Please ask yourself the following key items when preparing a presentation for nurses:

- Does the content organization reflect nursing process: Assessment, Planning, and Implementation?
- Does the content discuss the role of the nurse in health promotion and/or disease prevention?
- Does the content address the role of the nurse in the assessment/management of disease process?
- Does the content address cultural competencies/issues?

Content should be developed based on the most current available evidence. Documentation should support quality of evidence chosen for content. Examples should include evidence-based practice, literature or peer-reviewed journals, clinical guidelines, best practices, and content experts or expert opinions. Educational activities must meet the following guidelines to be eligible for awarding continuing education credit. Content must be:

- Beyond basic knowledge
- Generalized regardless of work setting
- Enhance professional development or performance of the nurse
- Evidenced based or based in the best available evidence
- Presented without promotion or bias
- At least 30 minutes in duration

Psychologists

Continuing education activities to be accredited for psychologists must build upon a completed doctoral program in psychology. Formal learning activities should: (1) be relevant to psychological practice, education, and science; (2) enable psychologists to keep pace with the most current scientific evidence regarding assessment, intervention, and education as well as important legal, statutory, or regulatory issues; and/or (3) allow psychologists to maintain, develop, and increase competencies to help improve services to the public and enhance contributions to the profession. Continuing education activities are not a substitute for the basic academic education and training needed for entry to the field of psychology, nor should it be the primary vehicle for career changes from one APA-recognized specialty area (e.g., clinical, counseling, school psychology) to another. Content must meet one of the following: focuses on application of psychological assessment and/or

intervention methods that have overall consistent and credible empirical support in the contemporary peer reviewed scientific literature beyond those publications and other types of communications devoted primarily to the promotion of the approach; focuses on ethical, legal, statutory, or regulatory policies, guidelines, and standards that impact psychological practice, education, or research; or focuses on topics related to psychological practice, education, or research other than application of psychological assessment and/or intervention methods that are supported by contemporary scholarship grounded in established research procedures.

Required Faculty Documentation

All faculty preparing a continuing education activity must provide certain information and be vetted for potential conflicts of interest. The following items are required and may be collected electronically via AffinityCE's Faculty Resource Center:

- Contact information
- Title, credentials, and current affiliation
- Curriculum Vitae or professional résumé
- Continuing Education Agreement (electronically signed)
- Disclosure of potential conflicts of interest (electronically signed)
- Activity learning objectives
- Presentation
- Post-test questions

In addition, all Planning Committee Members must complete a disclosure form related to potential conflicts of interest with an ineligible company (commercial interest).

Financial Relationships with Ineligible Companies

All individuals in a position to control the content of an activity are required to disclose all financial relationships with ineligible companies within the prior 24 months. These individuals include faculty, speakers, authors, planners, reviewers, and staff. Disclosures can be done by completing a disclosure form. Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor, royalties or patent beneficiary, executive role, an ownership interest- individual stocks and stock options need to be disclosed, diversified mutual funds do not. Research funding from ineligible companies should be disclosed by the principal or named investigator even if the individual's institution received the grant and manages the funds. There is no minimum financial threshold. Financial relationships with ineligible companies must be disclosed regardless of the amount and regardless of the potential relevance of each relationship to the education.

ACCME defines an ineligible company as a company whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

Learning Objectives/Outcomes

Learning objectives should be written in terms of measurement, e.g., "the learner will be able to define, recite, identify, describe," etc. Verbs that are open to many interpretations should be avoided.

Keep the following important points in mind when writing learning objectives:

- Learning objectives should indicate what the participant will be able to do at the conclusion of the activity

- Objectives should be derived from the overall purpose of the activity and should reflect the goals of changing the learner’s knowledge, competence, or patient care related outcomes
- An average of two to three objectives per presentation hour is realistic
- Objectives must be written with measurable verbs (see below)
- Vague or easily misinterpreted verbs that should be avoided include *know, understand, learn, appreciate, believe*, etc.

Suggested Verb List for Writing Measurable Learning Objectives/Outcomes

KNOWLEDGE	COMPREHENSION	APPLICATION	ANALYSIS	SYNTHESIS	EVALUATION
cite	associate	apply	analyze	arrange	appraise
count	classify	calculate	appraise	assemble	assess
define	compare	complete	contrast	collect	choose
describe	report	restate	criticize	specify	critique
draw	compute	demonstrate	debate	compose	determine
identify	contrast	dramatize	detect	construct	estimate
indicate	describe	employ	diagram	create	evaluate
list	differentiate	examine	differentiate	design	grade
name	discuss	illustrate	distinguish	detect	judge
point	distinguish	interpret	experiment	formulate	measure
read	explain	interpolate	infer	generalize	rank
recite	estimate	locate	inspect	integrate	rate
recognize	express	operate	inventory	manage	recommend
record	extrapolate	order	question	organize	revise
relate	restate	review	separate	plan	score
select	interpret	predict	summarize	prepare	select
state	interpolate	practice		produce	test
summarize	review	schedule		propose	
tabulate	locate	relate			
write	predict	report			
	translate	sketch			
		solve			
		translate			
		use			
		utilize			

Policy for Use and Disclosure of “Artificial Intelligence” in Continuing Education Activities

“Artificial Intelligence” (AI) systems may not always produce accurate and evidence-based information. Faculty and all individuals in control of content development should ensure that content is **accurate, evidence-based**, and that resources cited are **appropriate and accurate**.

- AI may be used to **analyze data** to identify trends or areas that need attention.
- Data collected and used by AI systems should **comply with relevant data protection regulations**.

- Data used for AI training should be **anonymized** and **de-identified** where necessary.
- Data retention should follow **best practices** and **legal requirements**.

Usage disclosure should include the following when AI tools are used in the development of educational content for a CE activity:

1. Name and version of the AI application (e.g., ChatGPT GPT-4o).
2. Where data used by the AI application was acquired and how permission for use was obtained (e.g., National Health Center for Health Statistics records available on the Internet at https://www.cdc.gov/nchs/data_access/ftp_data.htm, covered under CDC terms of use at <https://www.cdc.gov/other/agencymaterials.html>).
3. Purpose for which the faculty used the AI application (e.g., analysis of adverse drug reactions in patients).
4. Dates or range during which the AI application was used (e.g., January 5, 2024–March 18, 2025).

Slide Presentation Requirements: Compliance Slides

If your presentation will use PowerPoint slides, please insert the slides shown below. If you will not use slides for your presentation, the verbal equivalents of the following information should be conveyed to participants before you begin.

- Title slide with name, credentials, and affiliation of all authors and/or presenters
- Disclosures (sequence: after title slide)
- Learning outcomes (objectives) (sequence: following the disclosure slide)
- Describe the level of evidence on which the presentation is based with supporting data (study dates, design, and references most representative of the content presented and sourced from peer reviewed publications and journal articles from the last 5-7 years.
- How to earn credit (should be placed at the end of the slide deck)

Title and Faculty: Slide 1

Presentation Title

Mary Smith MD
Name, Credentials, Position or Affiliation

Disclosures: Slide 2

Disclosures

(Presenter's name) has no relevant financial relationships with ineligible companies to disclose.

Or

(Presenter's name)

Receives grant and/or research support from: (company name)

Is a member of the Speakers Bureau for: (company name)

Is a member of the Advisory Board for: (company name)

Disclosure will be made when a product is discussed for an unapproved use.

This continuing education activity is provided by AffinityCE and NABIS staff. AffinityCE staff, NABIS staff, as well as planners and reviewers, have no financial relationships with ineligible companies to disclose.

AffinityCE adheres to the ACCME's Standards for Integrity and Independence in Accredited Continuing Education. Any individuals in a position to control the content of a CME activity, including faculty, planners, reviewers, or others, are required to disclose all relevant financial relationships with ineligible companies. All relevant financial relationships reported for faculty, have been mitigated by the peer review of content by non-conflicted reviewers prior to the commencement of the activity.

Commercial support was not received for this activity.

Learning Outcomes or Objectives: Slide 3

Learning Objectives

At the conclusion of this activity, the participant will be able to:

- 1.
- 2.
- 3.
- 4.

References and Bibliography: Slide 4

References and Bibliography

Describe the level of evidence on which the presentation is based with supporting data (study dates, design, and references most representative of the content presented and sourced from peer reviewed publications and journal articles from the last 5-7 years.

Last Slide in the Presentation: Slide 5

How to Claim CE Credit

If you would like to receive continuing education credit for this activity, please refer to the link provided to registered participants.

Some Final Thoughts to Consider

please only include information from recent publications and studies. Please use recent references and citations-within the last 3 to 5 years. References and citations should be included on the slide displaying the information.

The Dos and Don'ts of Preparing a CME/CE Presentation

Your CE presentation must be evidence-based, fair-balanced, and nonpromotional. Please consider the following when preparing your slides.

DO

1. Provide information based on accepted, well-documented and referenced science
2. Cite current references
3. Remember that the audience is multidisciplinary
4. Let your audience know when you are discussing unapproved products or uses
5. Use case studies when possible
6. Encourage participation
7. Include the required CE slides or verbal equivalents if not using slides

DON'T

1. Use brand names
2. Include logos of commercial interests on your slides
3. Promote or favor a product or service
4. Recommend unapproved therapy