CONTINUING EDUCATION –CE PROGRAM
PROTOCOL GUIDE FOR EDUCATIONAL ACTIVITY
PROCESS FOR APPROVAL OF A CE ACTIVITY EVENT

Contact a CSL CE Planner at ceprograms@bayada.com for a planning session at least two (2) months prior to the planned education date. This is to help ensure timeliness of loading all courses to BAYADA Education Connection where learners receive their certificates. Also, to provide an opportunity for all members of the target audience to receive CE credit.

No contact hours will be awarded for any educational activity that has not received approval by a CSL CE Planner.

For all educational activities, the planning process will begin immediately upon notification to a CSL CE planner. The CE planning committee will include a CSL CE planner and an expert in the subject matter (main presenter or author) for the target audience.

The initial planning meeting agenda will include the type of educational activity, topic, intended target audience, learning needs, and designation of a Coordinator. Documentation of learning needs is required prior to approval of any educational activity. The needs documentation of why a particular topic is requested to be taught to your specific audience is the ticket to get an educational activity on the approval calendar.

The CSL CE Planner will provide the Coordinator all required forms to be completed by a designated deadline. The requirements for evaluation completion and certificate distribution for each continuing education event will also be reviewed.

Timelines may change at the discretion of the CSL Lead CE Planner contingent on the volume of pending educational activities. Large or multiple session program timelines may be increased to allow proper processing by The CE Program Committee.

The Coordinator will act as the contact person to the CSL CE Planner and will educate and direct all other presenters and planners associated with the educational activity (BAYADA and external to BAYADA) about CE programs protocol. The Coordinator will ensure return of all applicable CE Program forms by the designated deadline to ceprograms@bayada.com.

Any outstanding items must be submitted by the Coordinator within 10 business days of conclusion of the educational activity to ceprograms@bayada.com to facilitate accuracy of record keeping.

All advertising for educational activities will follow a standard format to meet BAYADA branding and accreditation requirements. This includes all communication documents and social media options. An advertising request form is used to ensure this process.

All enduring self-directed learning (SDL) (printed, e-learning, recorded webinar) educational activity contact hours will be determined by the planning committee to ensure appropriate method of awarding contact hours.

Please note: A presenter may not claim CE contact hours for an educational activity in which they facilitate as they are the subject matter expert. Contact hours will be prorated as applicable for sessions they have attended as a learner.
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COORDINATOR and PRESENTER RESPONSIBILITIES include but are not limited to:

- Review of guidelines for planning an educational activity as noted above. (There is no "blanket approval" for a presenter to be able to present a continuing education activity. Each presenter has to be approved for each educational activity even if they presented the same topic in the past. Each event stands alone and has to be approved individually as the needs for each target audience may vary).

- Maintain adherence to Compliance Guidelines to avoid violating any federal or state health care programs. See Appendix

- Maintain adherence to ANCC, AOTA and all credentialing bodies’ criteria throughout the educational activity.

- Use the approved CE Program PowerPoint template for any slide presentation (logos and branding limited to first and last slides). Facilitation notes must be added to ensure consistency of delivery of content for any repeat educational activities. If using an external presenter, the presenter may use their own PowerPoint template but it may only have a company name and logo on the first and last slide. It may not have company names or logos throughout the PowerPoint as this is interpreted as advertising by our accrediting bodies.

- Develop an educational activity with best available current content or evidence-based content with a minimum of 2 references no later than 5-7 years

- Represent original content of all material as your own independent work and that of BAYADA Home Health Care and not infringe on proprietary rights of another person or organization; obtain all required written permissions to reference, reproduce or otherwise use any resources for the content which you are not the author or copyright holder

- Reference the facilitator PowerPoint notes for consistency of the educational activity. Content integrity must be maintained therefore no revisions can be made to the content of the educational activity without notifying CSL CE Planner prior to the presentation.

- Provide an educational activity overview handout prior to any educational activity when a power point is not used. The document must include the title, date, presenter(s) profile, disclosure information, objectives, references, presenter(s) contact information and all accrediting bodies required accreditation statements.

- Obtain client consent if client photos or videos are to be used in the presentation. (See policy 0-2448)

- Maintain separate location outside of presentation room for all applicable marketing and vending materials.

- Provide the Disclosure Statement which must include accreditation statement prior to enrollment in the educational activity.

- Provide learning outcome and/or review of educational objectives prior enrollment to the educational activity.
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☐ Instruct the learners to complete evaluation (within one month) of the educational activity and claim certificate via BAYADA Education Connection site education.bayada.com

☐ Submit all documents to Coordinator to ensure accuracy of record keeping with CSL CE Planner.

Home Health offices please note:

- Any CE request for a “V” office must be reviewed with your Director of Area Sales prior to contacting the CE programs office (CSL).
- Any CE request for an “F” office must be reviewed by Sarah Walmsley prior to contacting the CE programs office.
### APPENDIX- CE COMPLIANCE GUIDELINES FOR NON-BAYADA LEARNERS

<table>
<thead>
<tr>
<th>What can be offered by BAYADA for Free (no cost to the learner for CE credit)</th>
<th>What cannot be offered by BAYADA for Free (no cost to the learner for CE credit)</th>
</tr>
</thead>
</table>
| - The event is for a referral source conducted at a neutral site (not BAYADA site; not on-site at a referral source facility) and  
  - The event is open to the general public and  
  - The event is advertised to the general public and  
  - The event does not include any attempts to market or promote BAYADA’s services. (Marketing may be conducted informally after the completion of the CE event but no attendee should be compelled to remain for any marketing discussions.)  
- The event is for a non-referral source which can be conducted at a BAYADA site or at the outside facility site (as long as the facility site is not owned/occupied by a referral source) | - The event is only open to the staff of a referral source regardless of site (referral source facility site or BAYADA site)  
- The event is not advertised to the general public  
- BAYADA is a speaker at the event held at a referral source facility site |

<table>
<thead>
<tr>
<th>What can be offered by BAYADA for a fee (learner must pay $$ for CE credit)</th>
<th>Other actions with limitations</th>
</tr>
</thead>
</table>
| - BAYADA is a speaker at the event held at a referral source facility site  
- The event for a specific referral source is held at a referral source facility site or a BAYADA site | - Participant/attendee lists from a CE course cannot be shared within BAYADA for marketing purposes (list is used to manage CEUs only)  
- Accepting any written communication requesting free CEUs from referral sources  
- Distributing and sharing the CE Course Topic List to anyone outside of BAYADA unless such persons will be paying a fee for the CEUs  
- A limited number (1-2 per year) of for-credit CE events (worth no more than 2 CEUs each) may be provided to payors at no fee provided the event is approved by CSL, formally tracked for reporting purposes and presents a relevant topic of education needed by the payor related to home health care (i.e., a payor cannot ‘cherry-pick’ from BAYADA’s CE Course Topic List)  
- Event must not include any attempt to market or promote BAYADA  
- Giveaways may only be of nominal value (worth less than or equal to $10 in the aggregate per attendee) and must be kept in a separate location outside of the event room  
- A light meal or snack (less than $15 per person) may be offered during the CE event but must be provided on-site only (no take home meals) (CCMC events excluded-no lunch & learns allowed) |

*The starting fee for a standard CE credit hour is $10 per person. Fees may increase based on course content. Fees will need to be established on a case-by-case basis, for each course, by the CE Program team.*