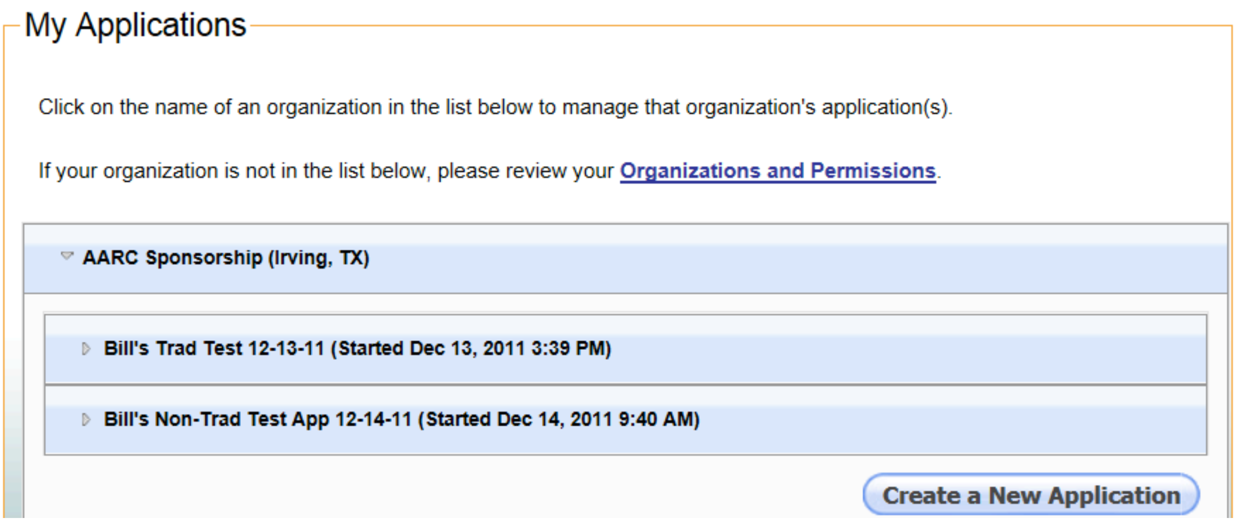
AARC CRCE Traditional Application Instructions

Author: Bill Dubbs (revised 11-21 -12)

Contents

Getting Started

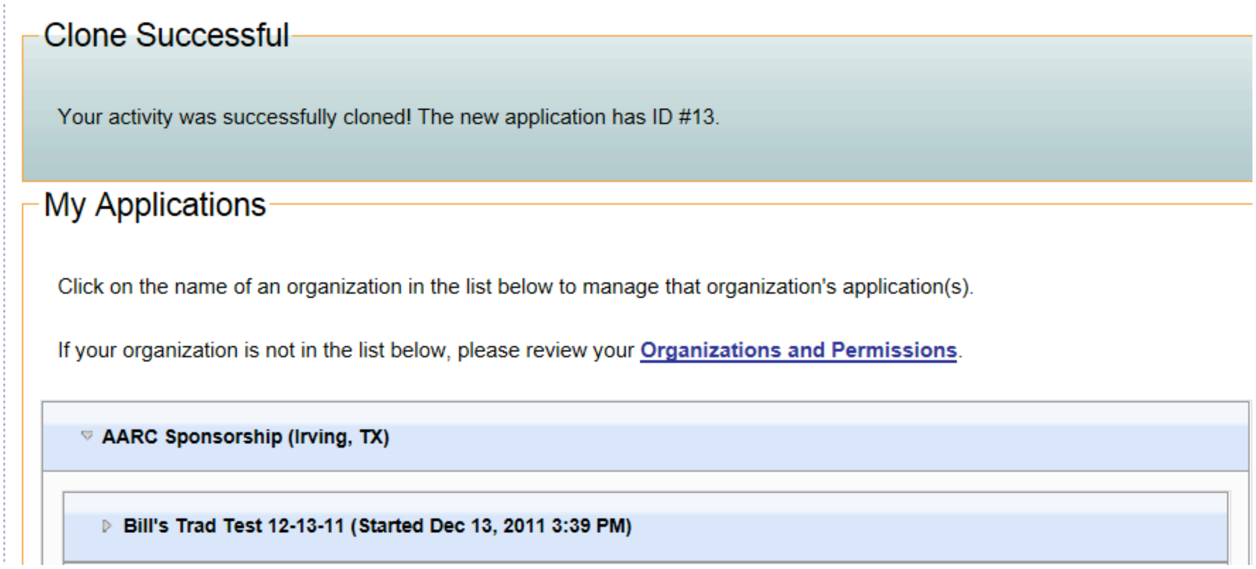


2 Options: (1) Select a previous listed application or (2) Create a new application

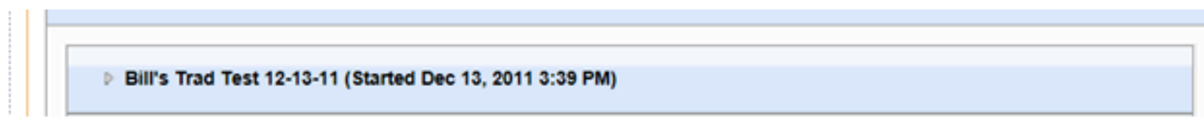
Option 1: Choose a previous application if you want to modify and submit one of your previous applications rather than creating a new application or to access the Application Services Center. If you chose Bill's Trad Test 12-13-11 the following screen appears:

Cloning an Existing Application

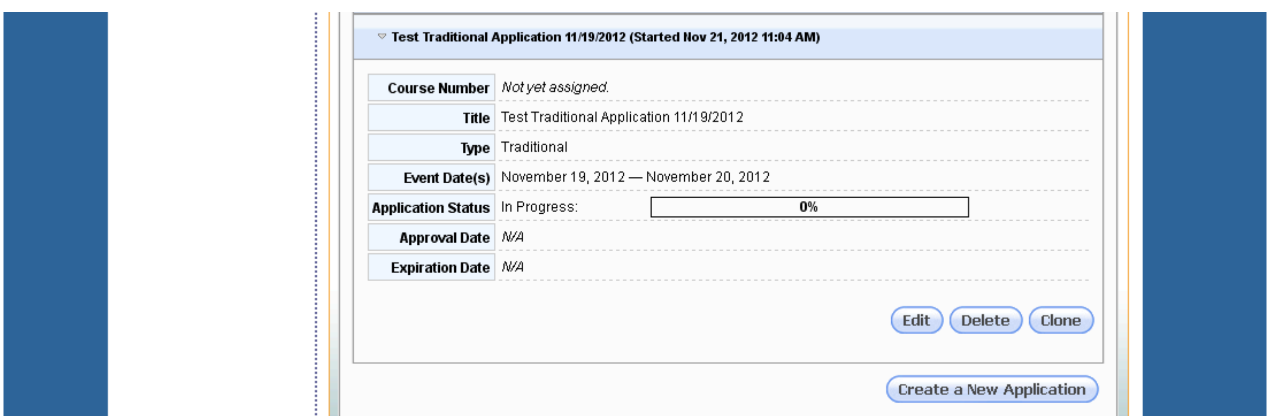
Selecting “Clone” allows you to copy and modify a previously submitted application.



The cloned application will appear at the bottom of your existing applications

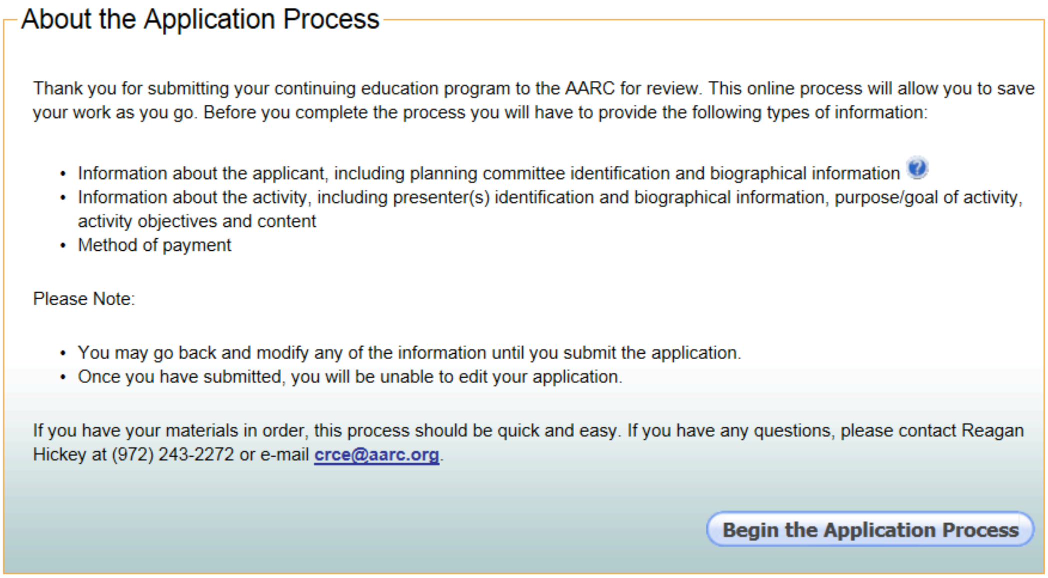


You may then click the cloned application and click Edit to make changes



Creating a New Application

Selecting the Create a New Application brings up this screen:


About the Application Process

Thank you for submitting your continuing education program to the AARC for review. This online process will allow you to save your work as you go. Before you complete the process you will have to provide the following types of information:

- Information about the applicant, including planning committee identification and biographical information
- Information about the activity, including presenter(s) identification and biographical information, purpose/goal of activity, activity objectives and content
- Method of payment

Please Note:

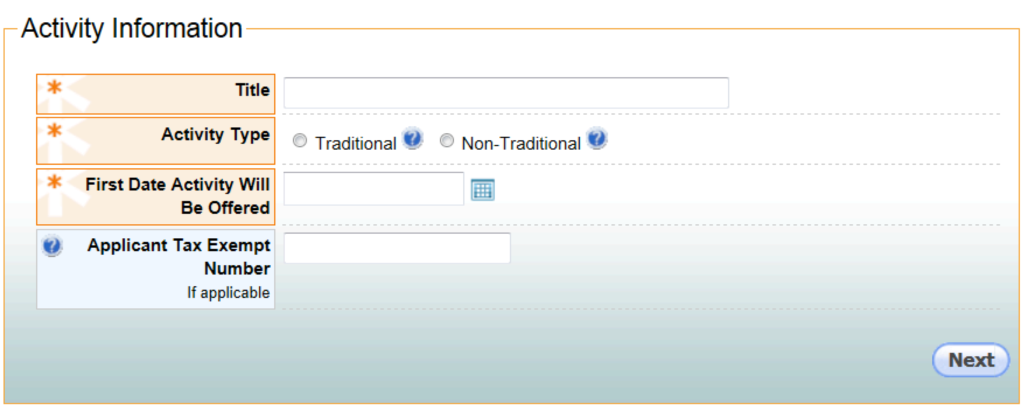
- You may go back and modify any of the information until you submit the application.
- Once you have submitted, you will be unable to edit your application.

If you have your materials in order, this process should be quick and easy. If you have any questions, please contact Reagan Hickey at (972) 243-2272 or e-mail crce@aarc.org.

Begin the Application Process

This screen provides some basic information about how the program works and the information you will need to complete the application. Note the question mark icon. These are inserted throughout the application where additional information may be helpful. Placing your mouse over this icon will reveal the information. If the box containing the information is larger than the window you may have to scroll down to read the entire contents. To close the information box, click the “x”.

After reviewing the information on the screen, click on “Begin the Application Process” to access this screen:


Activity Information

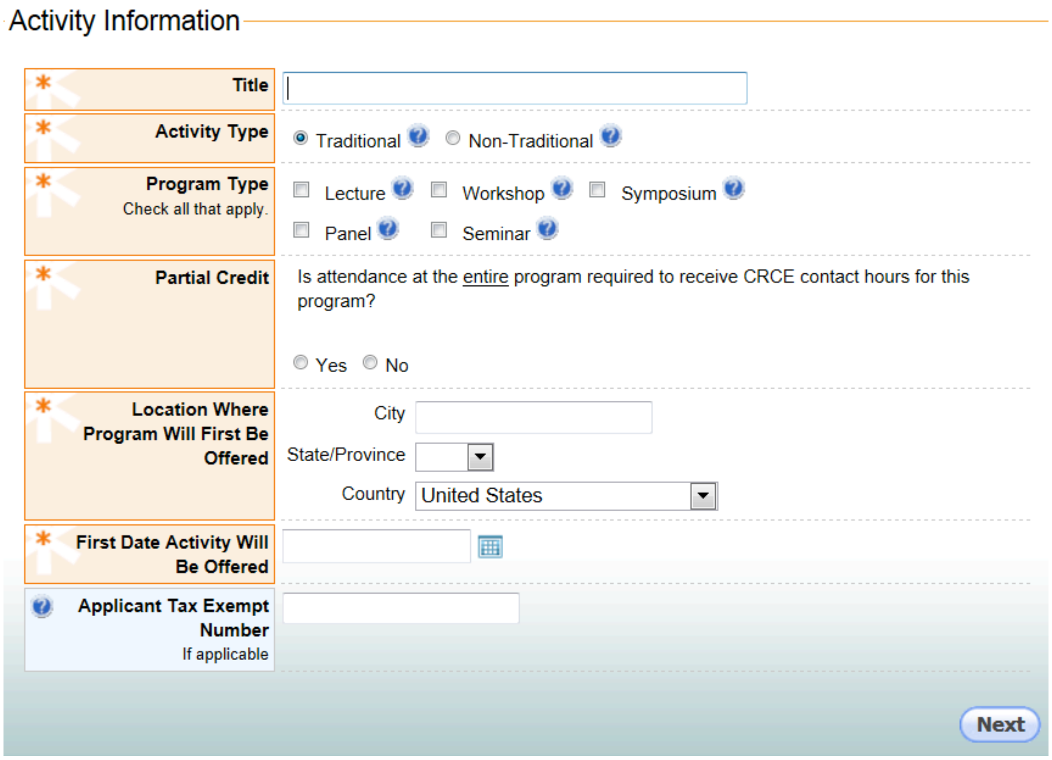
* Title
* Activity Type — Traditional / Non-Traditional
* First Date Activity Will Be Offered

Applicant Tax Exempt Number
If applicable

Next

You must enter the title of your program then select “Traditional” as the activity type. Should you neglect to complete any of the fields designated by an * you will be always be prompted to complete it before you can advance to the next screen.

When you select traditional the screen reappears as shown below:


Activity Information

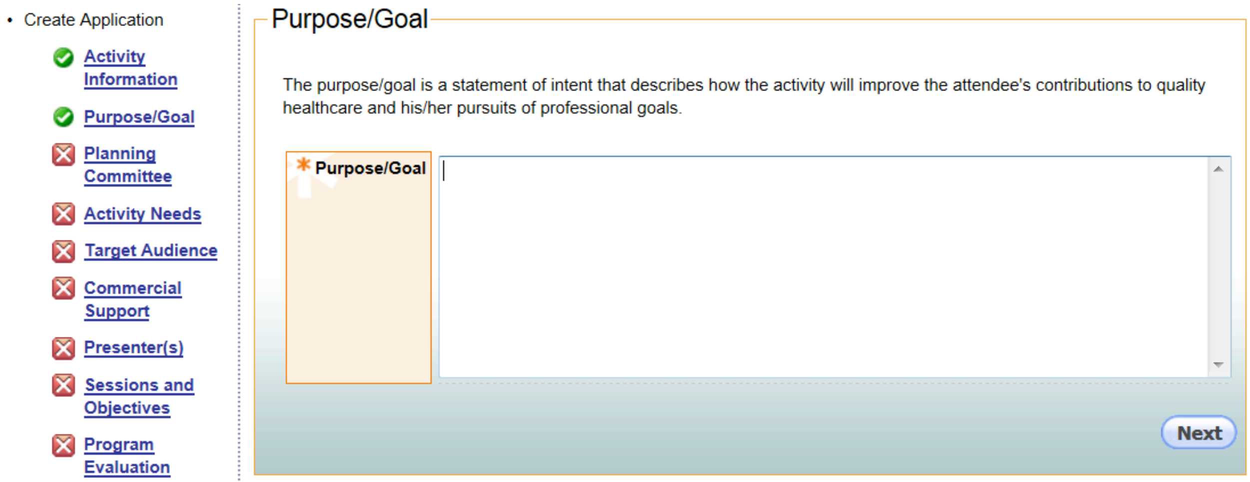
* Title	
* Activity Type	Traditional Non-Traditional
* Program Type Check all that apply.	Lecture Workshop Symposium Panel Seminar
* Partial Credit	Is attendance at the entire program required to receive CRCE contact hours for this program? Yes No
* Location Where Program Will First Be Offered	City State/Province Country United States
* First Date Activity Will Be Offered	
Applicant Tax Exempt Number If applicable	

Next

Select the program type that best describes your activity. Use the question icons to see the definitions of each. To have full or partial credit status assigned, indicate whether attendance at all sessions of the program is required. Identify the location of the first offering of this program in the fields provided. Continue by selecting the first date the program will be offered by clicking on the calendar icon. To assure the proper format, always use the icon selection rather than typing in the date. If you plan on repeating the course, you will be asked for that information later in the application. If your company is a for-profit company, leave the Tax Exempt Number field blank. If your company is a not-for-profit, enter your 9 digit tax exempt number provided by the federal government. This will be verified by our staff after your application reaches the payment page to assure that the proper application payment charge is assigned to your application.

Selecting “Next” brings you to this screen takes you to the purpose/goal screen.

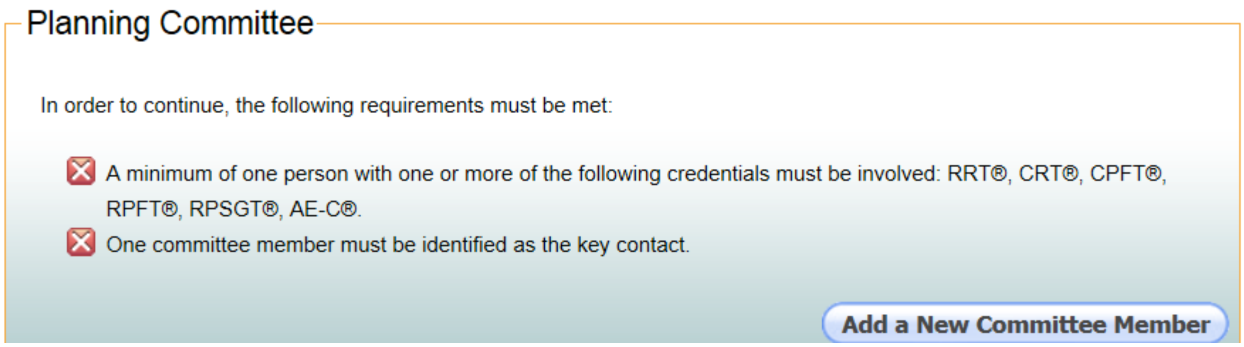
Purpose/Goal



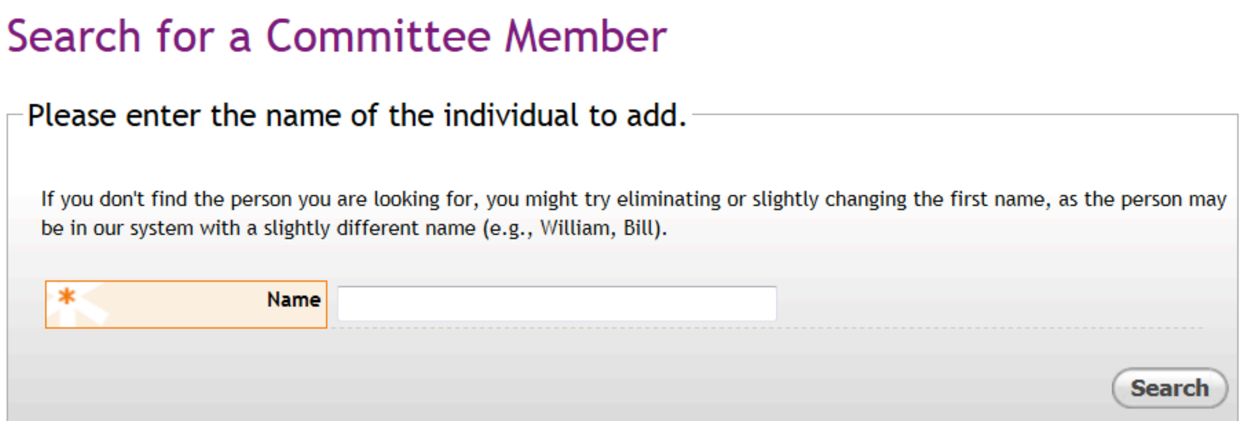
Describe the purpose/goal of this activity as defined in the instructions above the entry field. Note that a menu of essential application components now appears on the left of the screen. This menu allows you to see which components of the application have been completed (indicated by a green check) and which remain to be completed (indicated by a red “x”. You may go to any component of the application by clicking on one of the menu items.

Click “Next” to advance to this screen

Planning Committee

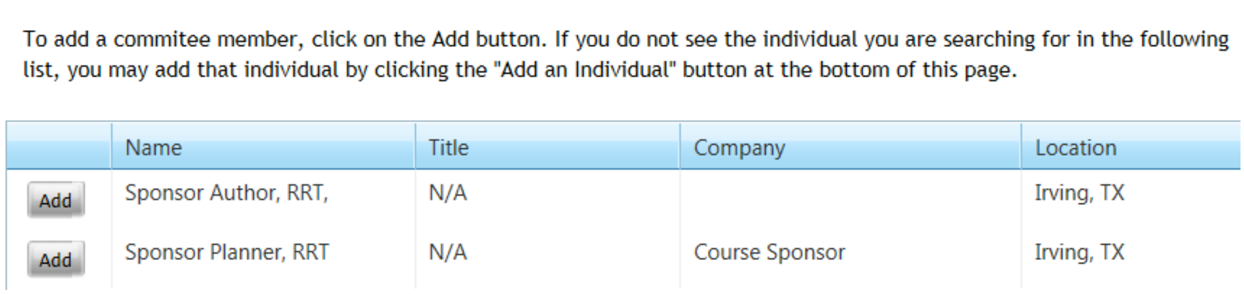


The requirements for a planning committee member are listed on this screen. After reviewing them click on “Add a New Committee Member” to begin identifying the Planning Committee member(s). The following screen will appear:



This field allows you to search the CRCE database for the individuals who have been previously entered into the system. This search is conducted for individuals made previously by your company and by other CRCE sponsors. If the individual is already in the data base it will minimize your data entry.

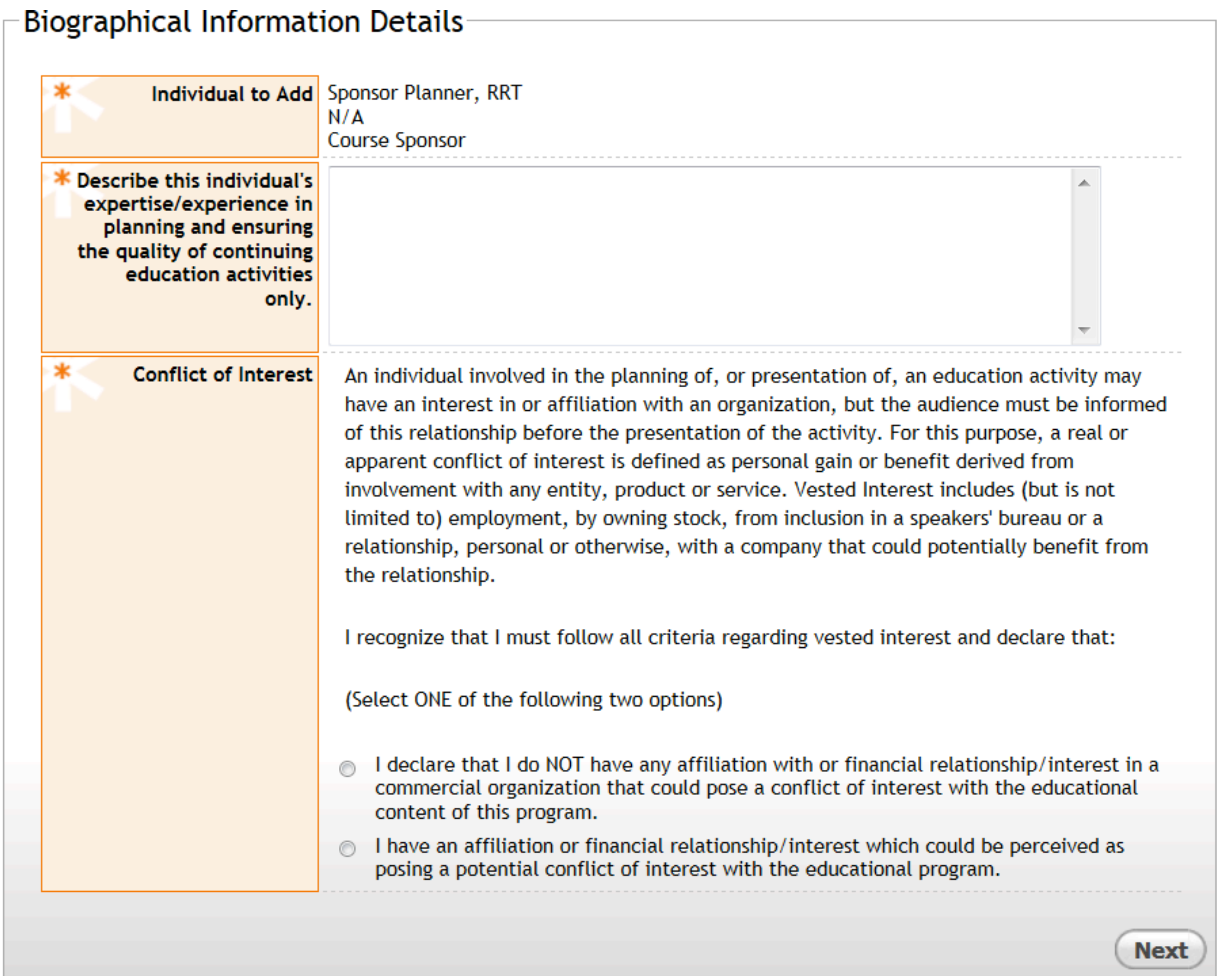
In this example I will enter “sponsor” which is part of the name of a fictitious person that exists in a testing data base. Two names are returned as shown below:


To add a commitee member, click on the Add button. If you do not see the individual you are searching for in the following list, you may add that individual by clicking the "Add an Individual" button at the bottom of this page.

	Name	Title	Company	Location
Add	Sponsor Author, RRT,	N/A		Irving, TX
Add	Sponsor Planner, RRT	N/A	Course Sponsor	Irving, TX

I will click on “Add” to left of Sponsor Planner. If the individual you are looking for does not appear see the information on page 11 titled Adding an Individual.

There must be a key contact for the planning committee. I will select Sponsor Planner for this role. Although one person can serve both roles I will designate another person at an additional member of the planning committee. Clicking “Next” brings up the following screen:

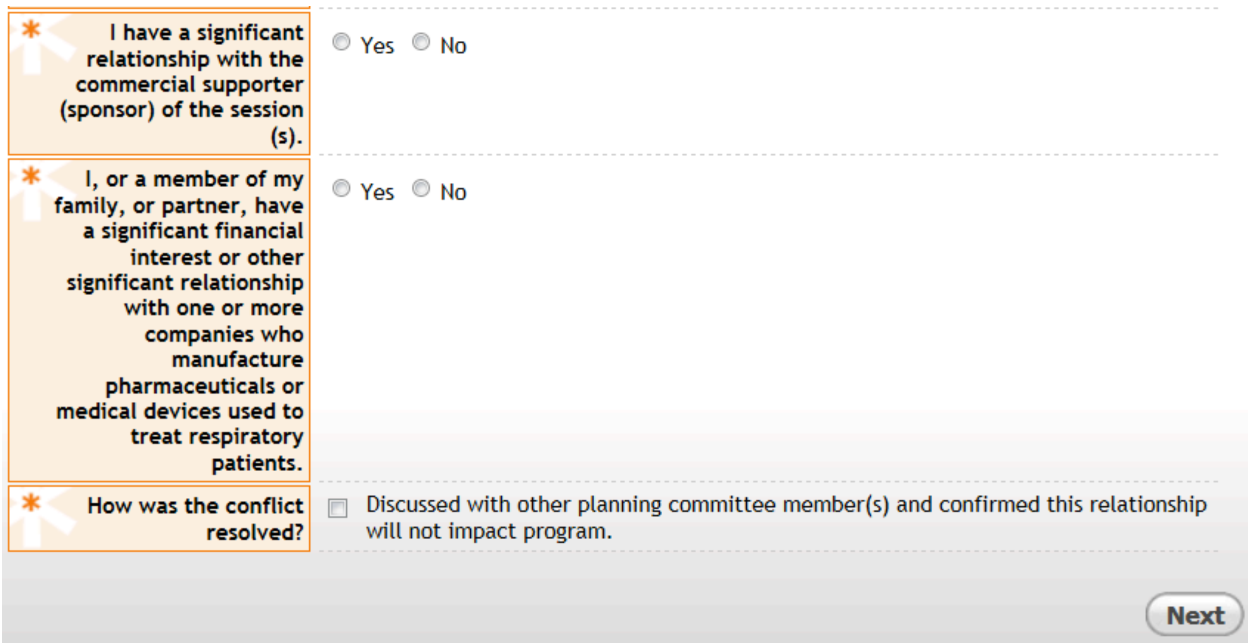


Biographical Information Details

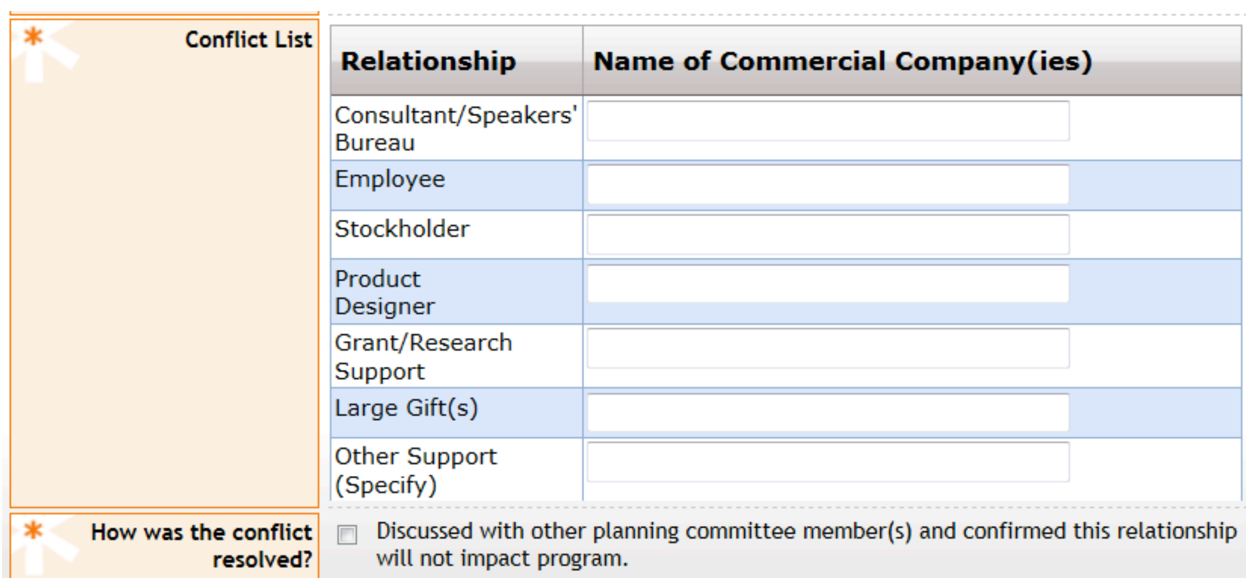
* Individual to Add	Sponsor Planner, RRT N/A Course Sponsor
* Describe this individual's expertise/experience in planning and ensuring the quality of continuing education activities only.	
* Conflict of Interest	An individual involved in the planning of, or presentation of, an education activity may have an interest in or affiliation with an organization, but the audience must be informed of this relationship before the presentation of the activity. For this purpose, a real or apparent conflict of interest is defined as personal gain or benefit derived from involvement with any entity, product or service. Vested Interest includes (but is not limited to) employment, by owning stock, from inclusion in a speakers' bureau or a relationship, personal or otherwise, with a company that could potentially benefit from the relationship. I recognize that I must follow all criteria regarding vested interest and declare that: (Select ONE of the following two options) ○ I declare that I do NOT have any affiliation with or financial relationship/interest in a commercial organization that could pose a conflict of interest with the educational content of this program. ○ I have an affiliation or financial relationship/interest which could be perceived as posing a potential conflict of interest with the educational program.

Next

On this screen two pieces of information are required. First a description of the person's expertise in relation to the program being planned and information about any potential conflict of interest (COI) they may have. These two bits of information are always required of planners- even those in the data base. If a potential COI is perceived the second button must be checked. The following additional information is required:



Answering Yes or No to first question will not change the screen. If “Yes” is selected as the response to the second question the following additional questions appear on the screen:



* Conflict List

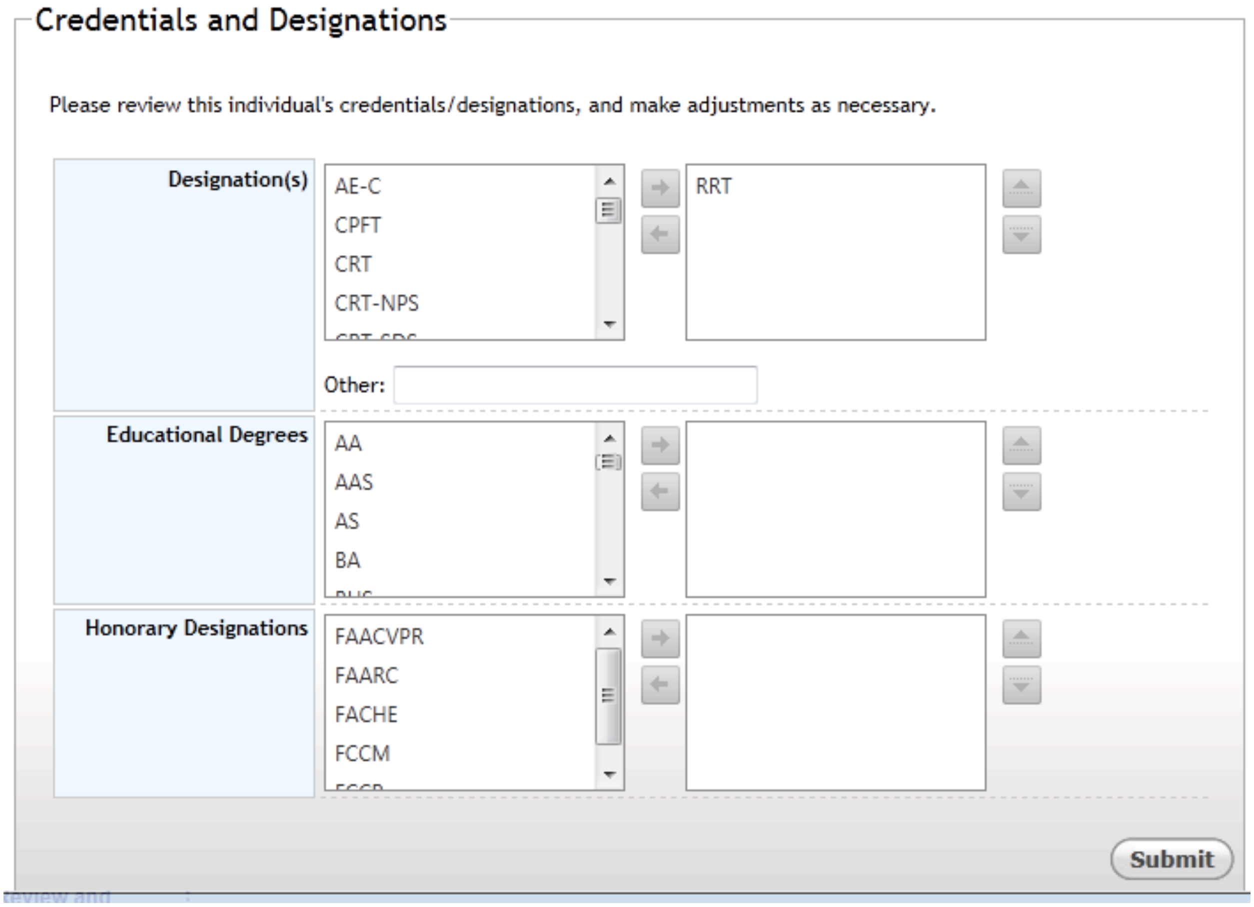
Relationship	Name of Commercial Company(ies)
Consultant/Speakers' Bureau	
Employee	
Stockholder	
Product Designer	
Grant/Research Support	
Large Gift(s)	
Other Support (Specify)	

* How was the conflict resolved?

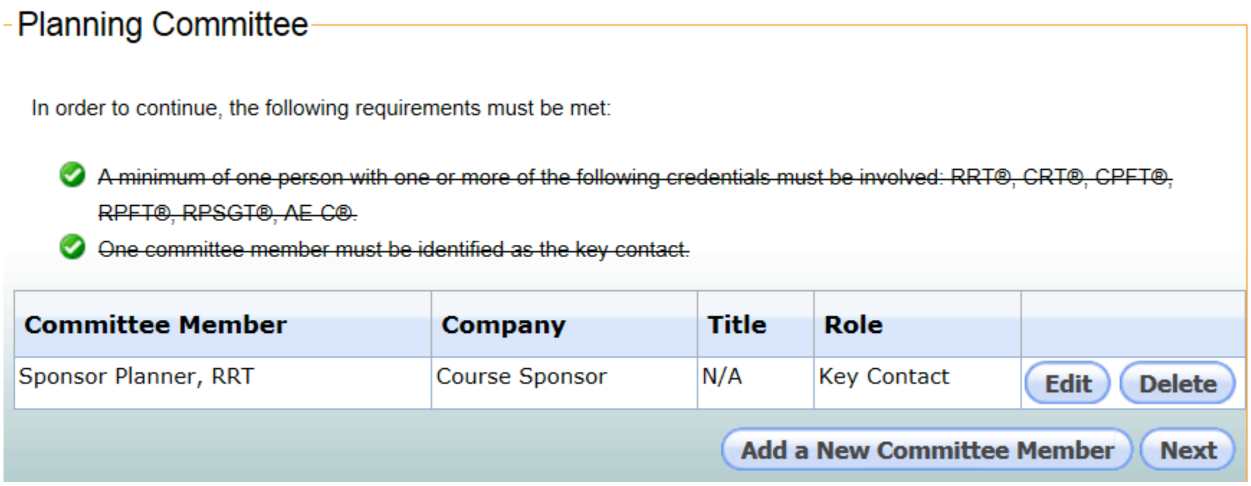
Discussed with other planning committee member(s) and confirmed this relationship will not impact program.

The entry of the name of a company is required to provide full disclosure of the potential COI and necessitates a discussion the situation with the other planning member(s) to confirm that Sponsor Planner’s relationship will not impact the integrity of the program. If the COI cannot be resolved to the satisfaction of the other members of the planning committee, Sponsor Planner cannot serve on planning committee. In this example, “Dexter” is entered in the Employee field. Checking the last box on this screen verifies that the COI has been discussed and resolved. The program will not allow the application to continue until this box is checked.

The following screen addresses credentials, degrees and honorary designations:



Sponsor planner had previously been entered into the database as an RRT. This is confirmed on this screen where it can be changed or other credentials added. To remove RRT, highlight it and click on the left arrow. To add another credential, scroll the left window until it appears then click the right arrow to move it into the selection window. If a relevant information is not listed, it may be added in the “Other” field. By leaving the credential as RRT and clicking the submit button, the following screen appears:


Planning Committee

In order to continue, the following requirements must be met:

- ~~A minimum of one person with one or more of the following credentials must be involved: RRT®, CRT®, CPFT®, RPFT®, RPSGT®, AE-C®.~~
- ~~One committee member must be identified as the key contact.~~

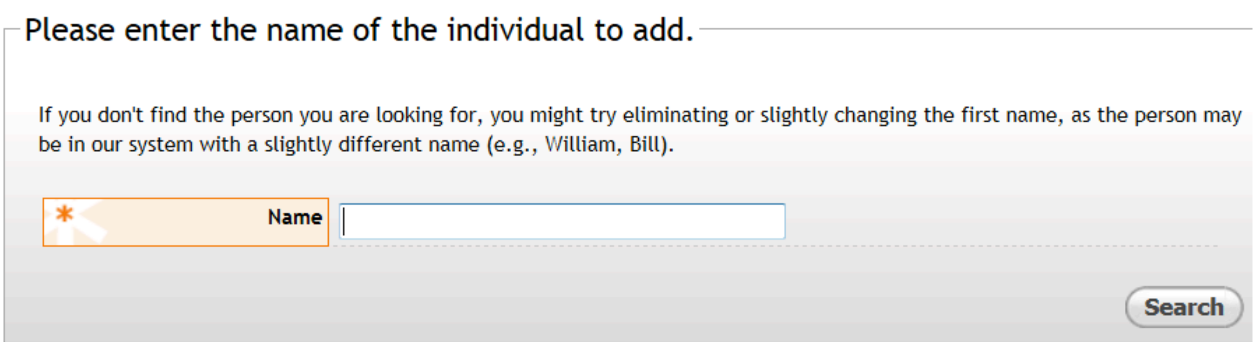
Committee Member	Company	Title	Role	
Sponsor Planner, RRT	Course Sponsor	N/A	Key Contact	Edit Delete

Add a New Committee Member Next

Notice the requirements at the top are crossed out and have a green check mark preceding them. This means that Planner met the requirements for the planning committee for this program. The information provided about this person thus far may be either edited or deleted at this time. By clicking “Add a New Committee Member” another person can be added to the committee.

Adding a New Individual

If the name of a person who is not in the data base is added, the following screen appears:


Please enter the name of the individual to add.

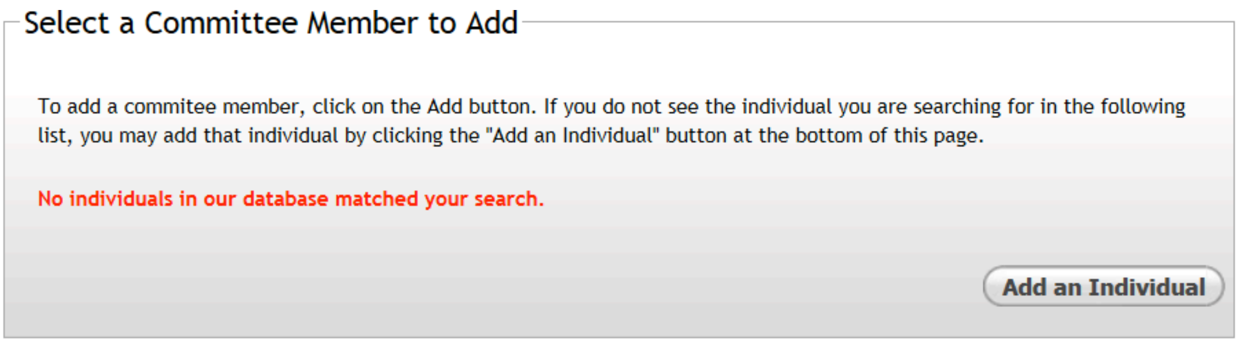
If you don't find the person you are looking for, you might try eliminating or slightly changing the first name, as the person may be in our system with a slightly different name (e.g., William, Bill).

* Name

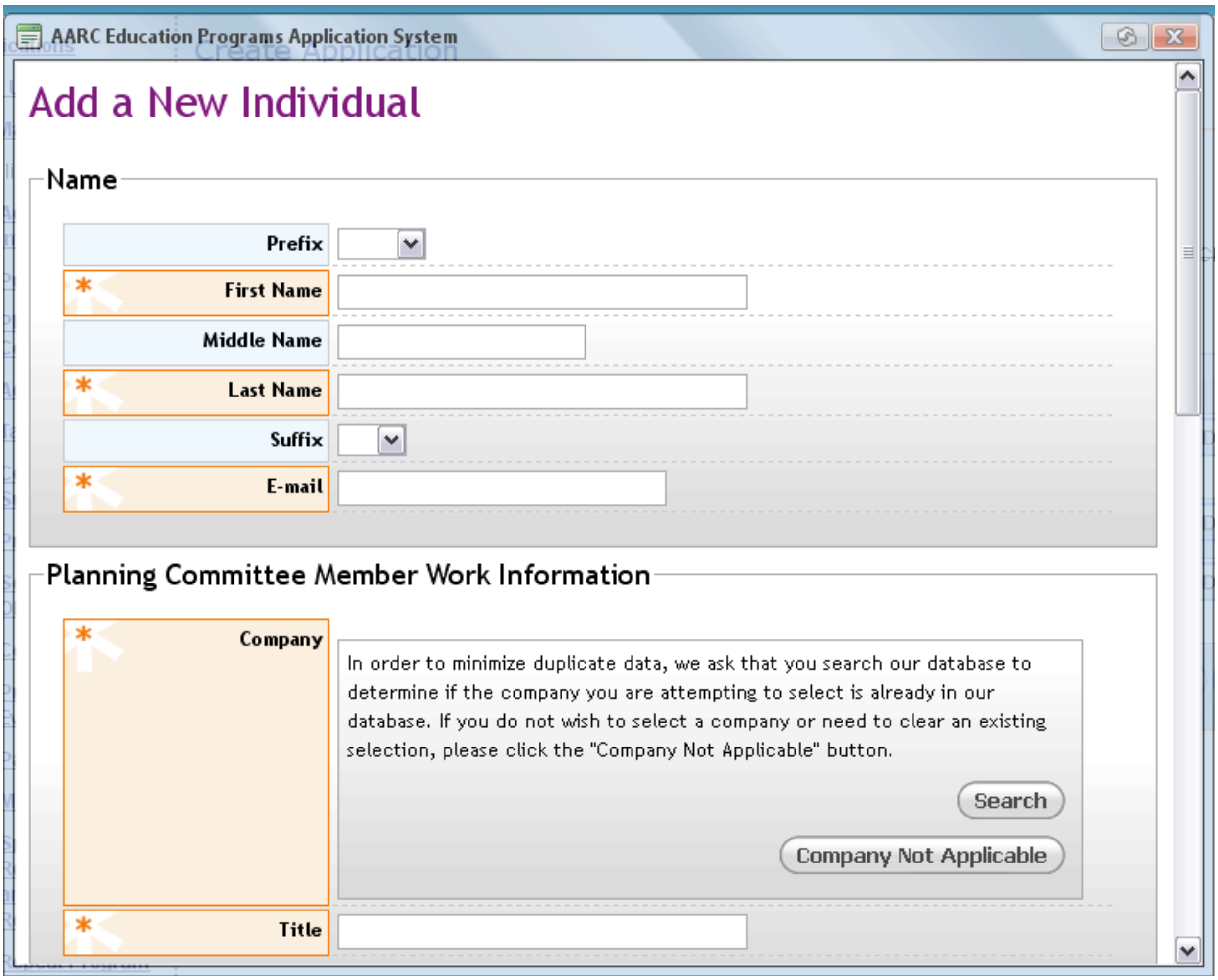
Search

The name of the person (Dirk Nowitzki) is entered and a search of the database is initiated by clicking on “Search”.

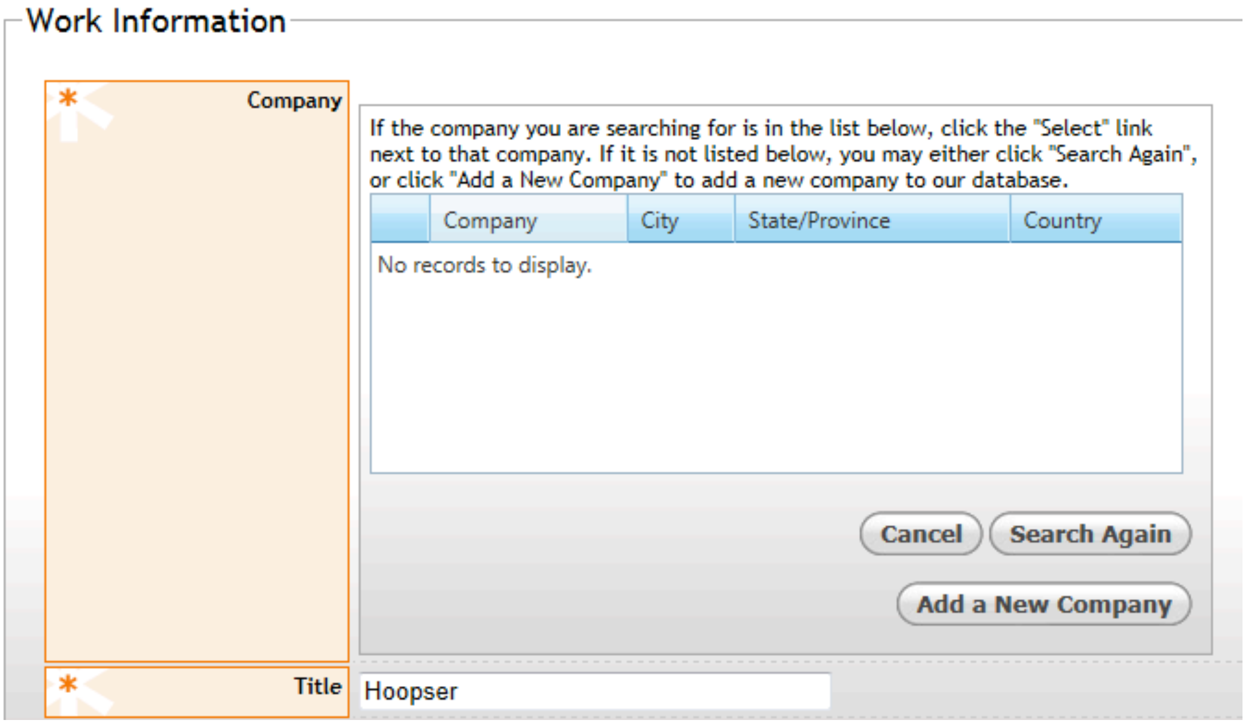
The following message is returned.



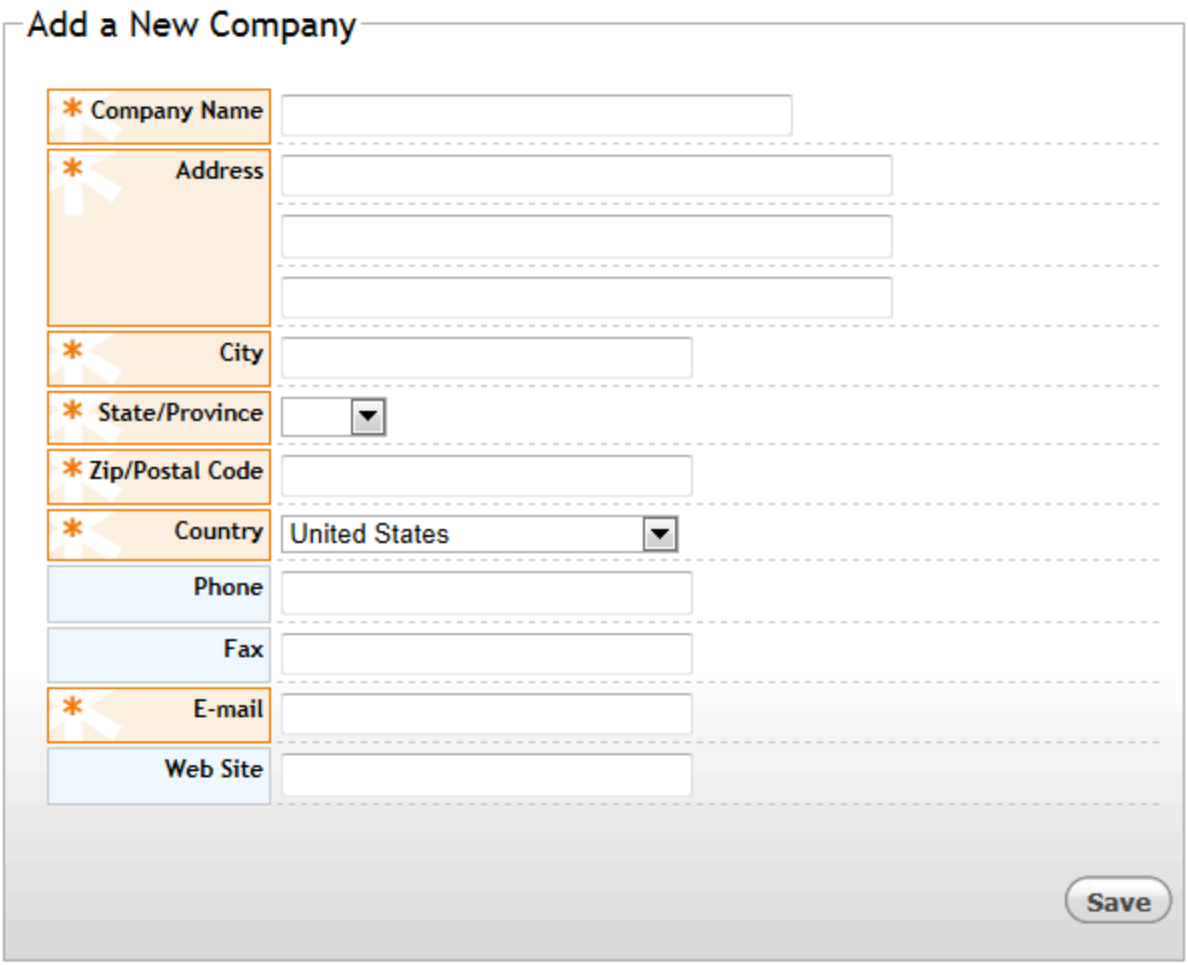
This confirms that Dirk is not in the database. Click on “Add an Individual”. You will also choose this button if you if another individual with the same name but associated with another city is returned. The following screen appears after clicking “Add an Individual”:



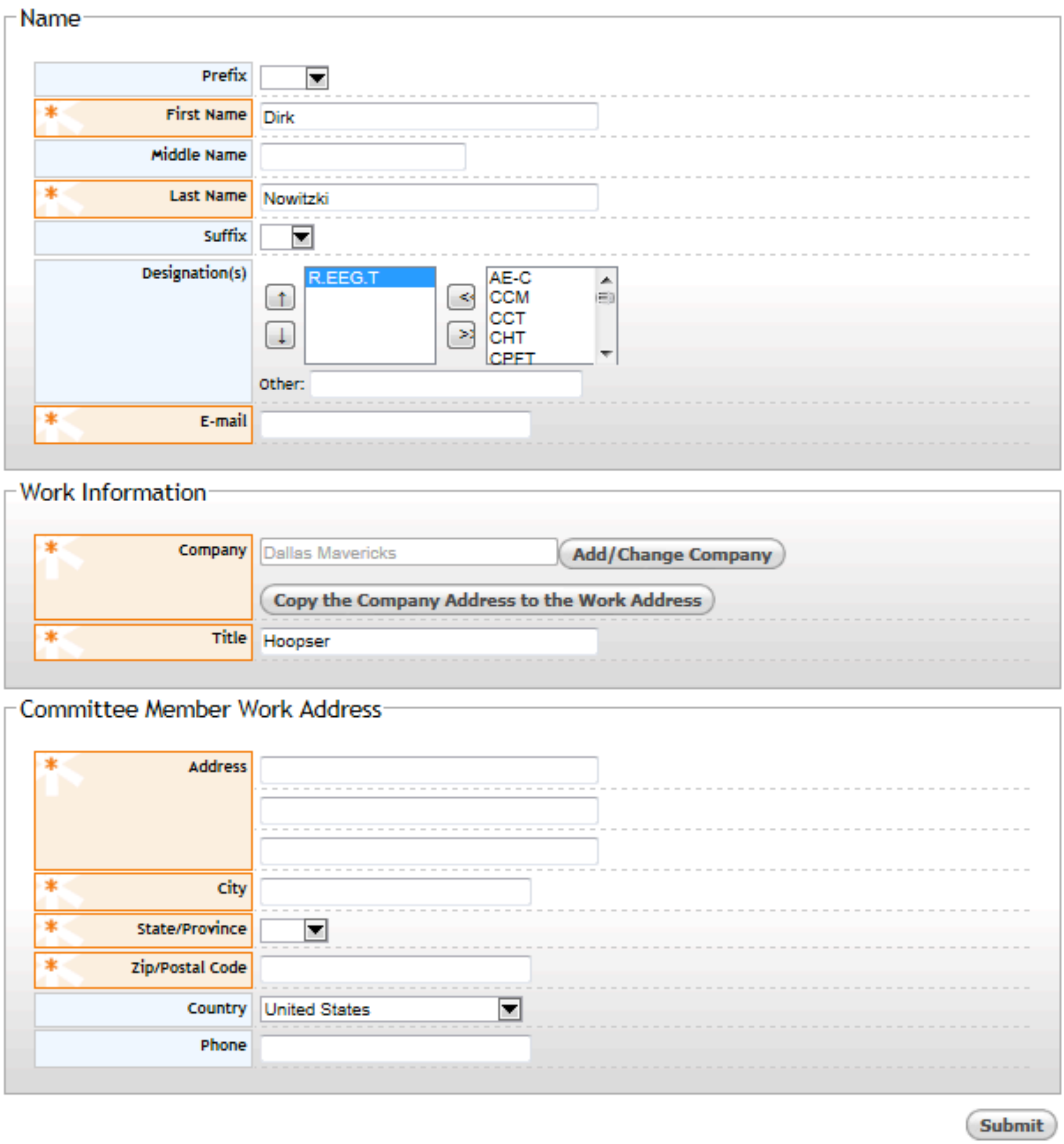
Required information (indicated by and*) fields in the Name, Work Information and Work Address fields must be completed. If the individual does not work for a company click on “Company Not Applicable” Since Dirk is employed by the Dallas Mavericks, his company (Dallas Mavericks) is entered as is his position as “Hoopster”. Clicking “Search” returns the following screen:



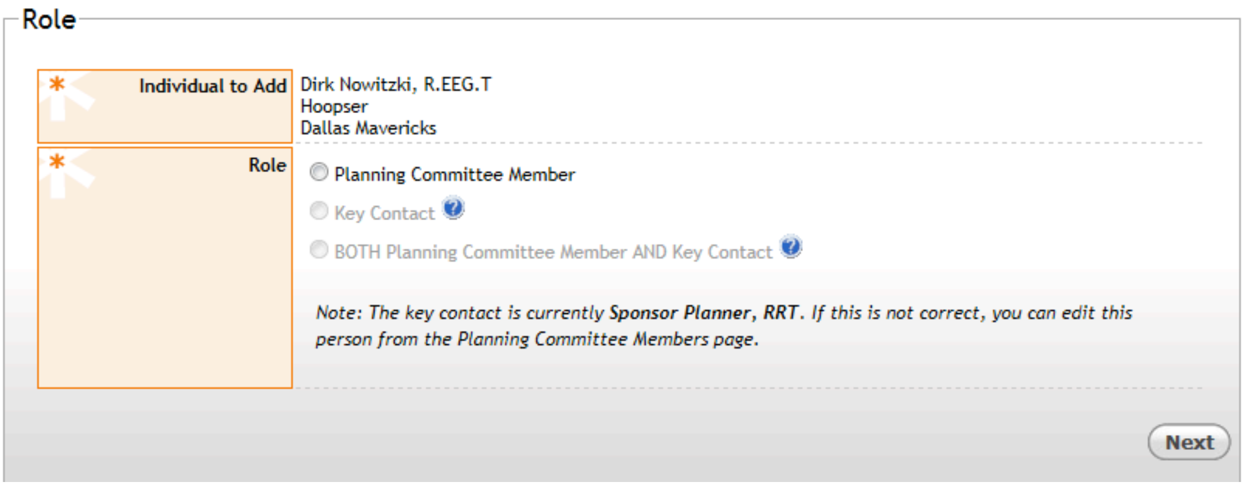
This screen documents that Dirk is not in the data base which requires that “Add a New Company” be clicked. The following screen is returned:



After all required fields are completed click the “Save” button. This will enter the company into the data base where the information will remain available to anyone searching for it. Clicking the “Save” button brings up the following screen:



This screen is requesting work contact information about the member of the planning committee whose work information was previously entered. If the person's address is the same as the company's address, then simply click "Copy the Company Address to the Work Address" which will automatically be populate the fields in the Committee Member Work Address section. If Company and the planner's work address are different, the Committee Member Work Address fields must be completed. Clicking on "Submit" brings up the following screen:


Role

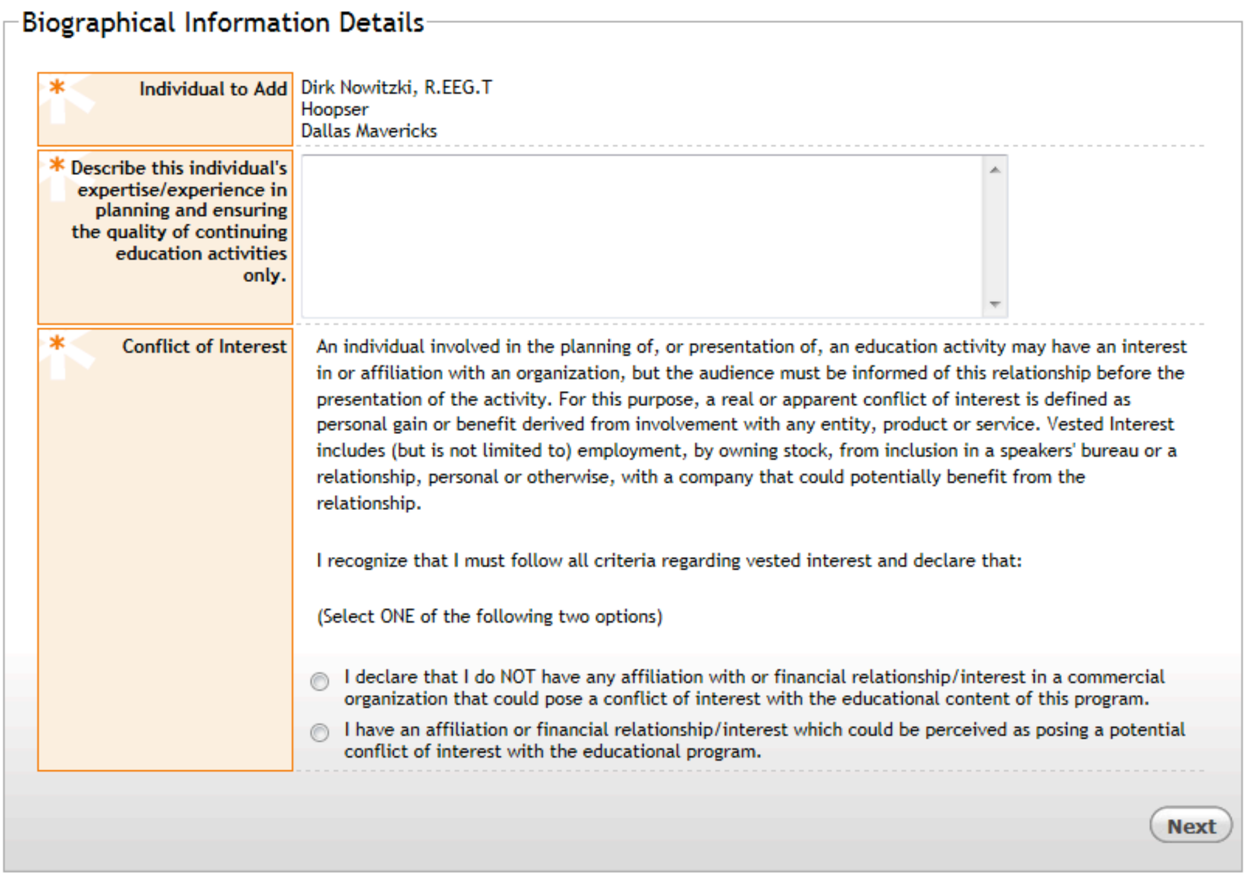
* Individual to Add | Dirk Nowitzki, R.EEG.T
Hoopser
Dallas Mavericks

* Role
Planning Committee Member
Key Contact
BOTH Planning Committee Member AND Key Contact

*Note: The key contact is currently **Sponsor Planner, RRT**. If this is not correct, you can edit this person from the Planning Committee Members page.*

Next

Because another person has been selected as the Key Contact, choose Planning Committee Member and then click “Next” to bring up the following screen:


Biographical Information Details

* Individual to Add | Dirk Nowitzki, R.EEG.T
Hoopser
Dallas Mavericks

* Describe this individual's expertise/experience in planning and ensuring the quality of continuing education activities only.

* Conflict of Interest

An individual involved in the planning of, or presentation of, an education activity may have an interest in or affiliation with an organization, but the audience must be informed of this relationship before the presentation of the activity. For this purpose, a real or apparent conflict of interest is defined as personal gain or benefit derived from involvement with any entity, product or service. Vested Interest includes (but is not limited to) employment, by owning stock, from inclusion in a speakers' bureau or a relationship, personal or otherwise, with a company that could potentially benefit from the relationship.

I recognize that I must follow all criteria regarding vested interest and declare that:

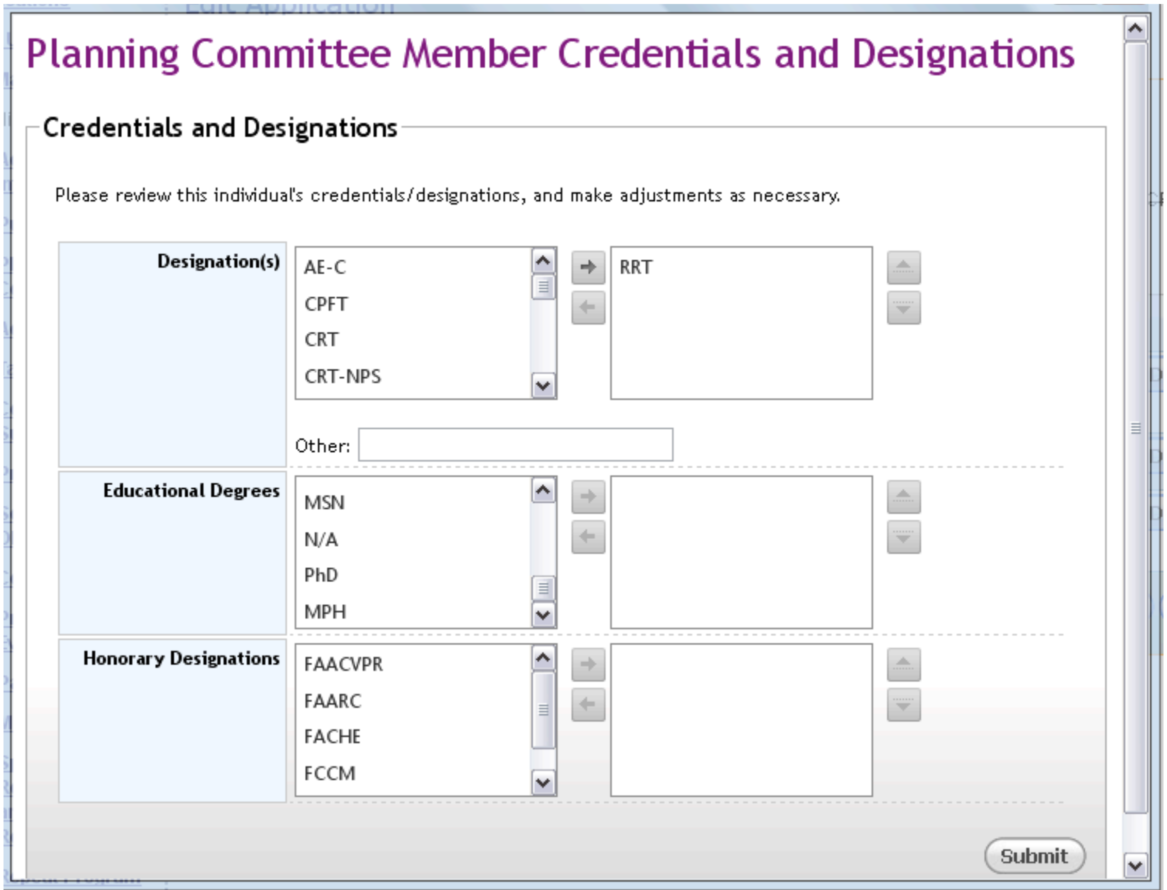
(Select ONE of the following two options)

I declare that I do NOT have any affiliation with or financial relationship/interest in a commercial organization that could pose a conflict of interest with the educational content of this program.

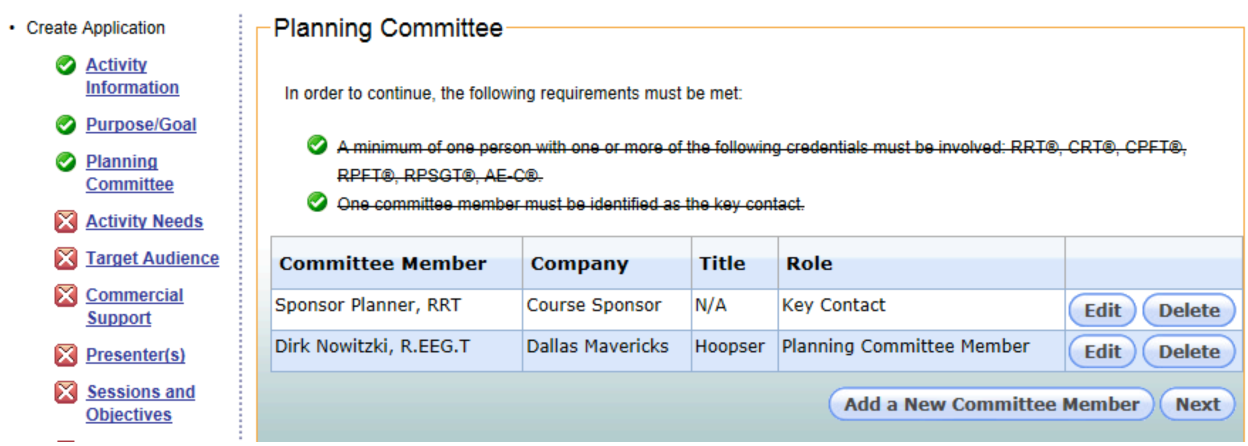
I have an affiliation or financial relationship/interest which could be perceived as posing a potential conflict of interest with the educational program.

Next

Complete this screen to provide the required planner information. This planner has no conflict of interest so the first response is checked. Clicking “Next” brings up the following screen:



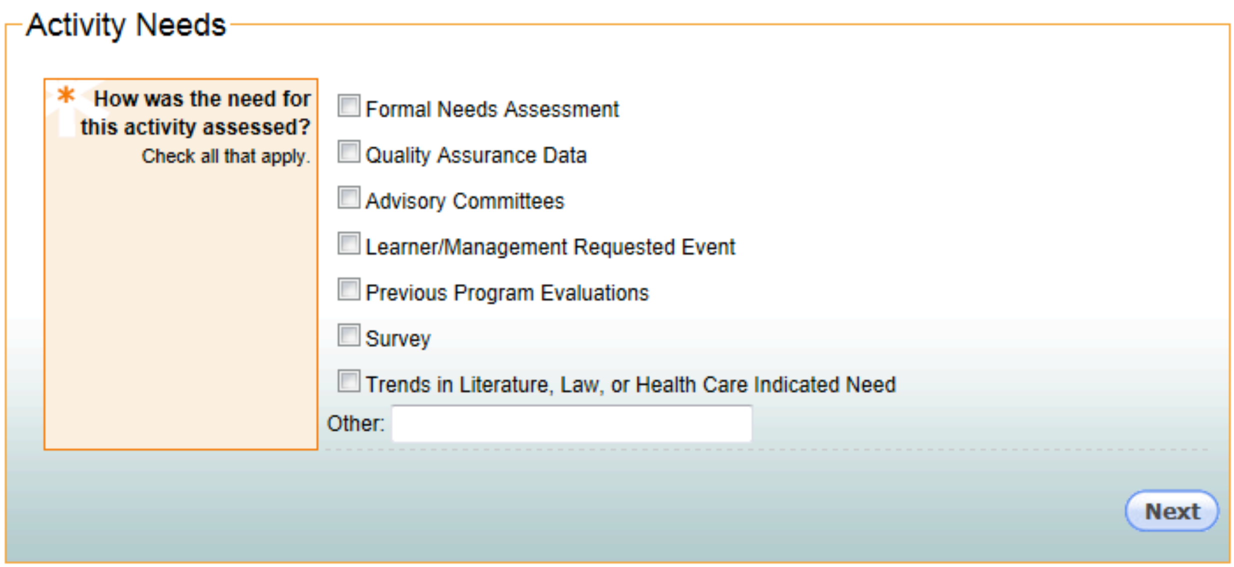
Again, as with the previous planner, Dirk's information requires verification. After verification click "Submit" and this screen will be displayed:



Note that the requirements for the planning committee have been met. Additional committee members may be added by clicking on "Add a New Committee Member". Indicate that all adding committee members have been added by clicking "Next" which advances to the next stage of the application-Activity Needs.

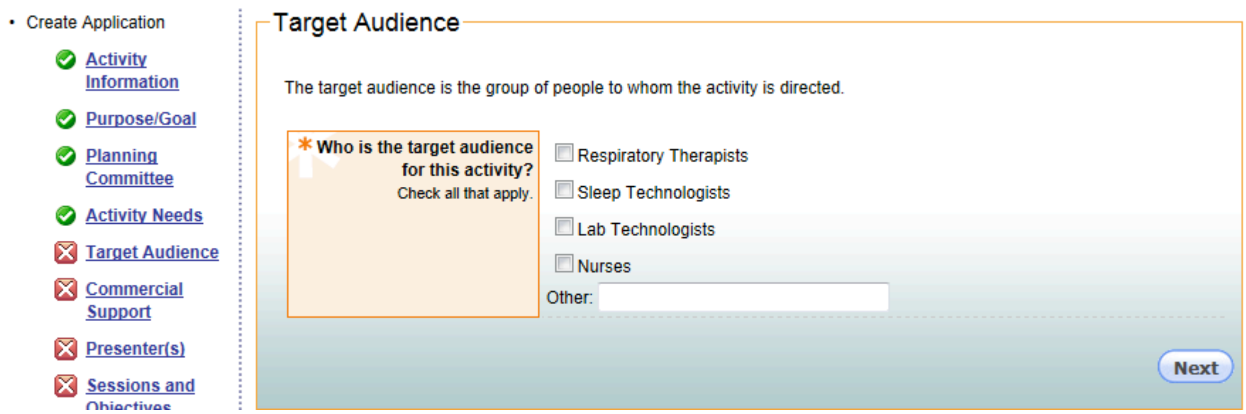
Activity Needs

The following screen appears:



Indicate all of the methods employed to determine the need for this program. Then click “Next” to move to the Target Audience section of the application.

Target Audience



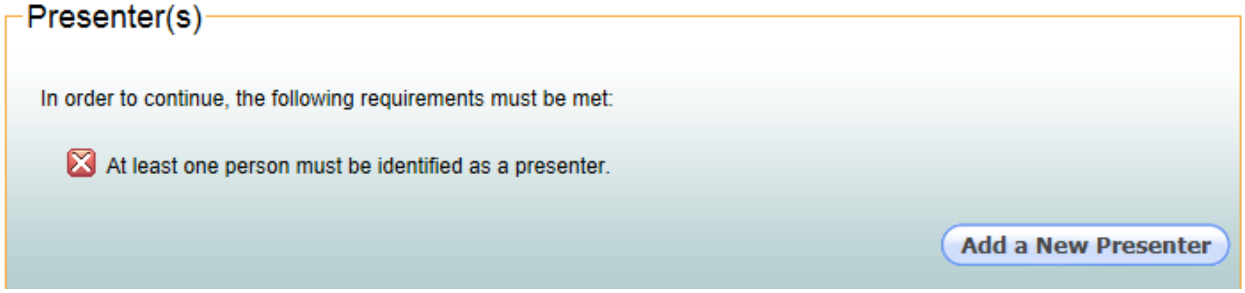
Click all applicable target groups then click "Next" to move to the Commercial Support section of the application.

Commercial Support

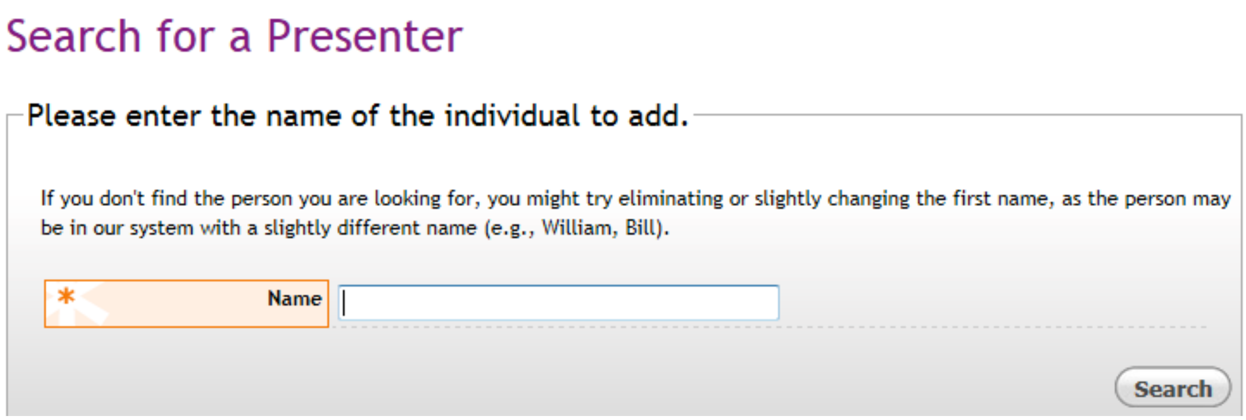
After reviewing the definition of commercial support, indicate whether the activity has commercial support. The default choice is no commercial support is provided. If commercial support is provided click the first statement. The following additional information questions appear on the screen:

Provide the information requested in the first comment field and check all appropriate boxes. All issues regarding content bias must be addressed and resolved. The last two boxes must be completed prior to the submission of the application. Click Next to advance to the presenter section of the application.

Presenter(s)



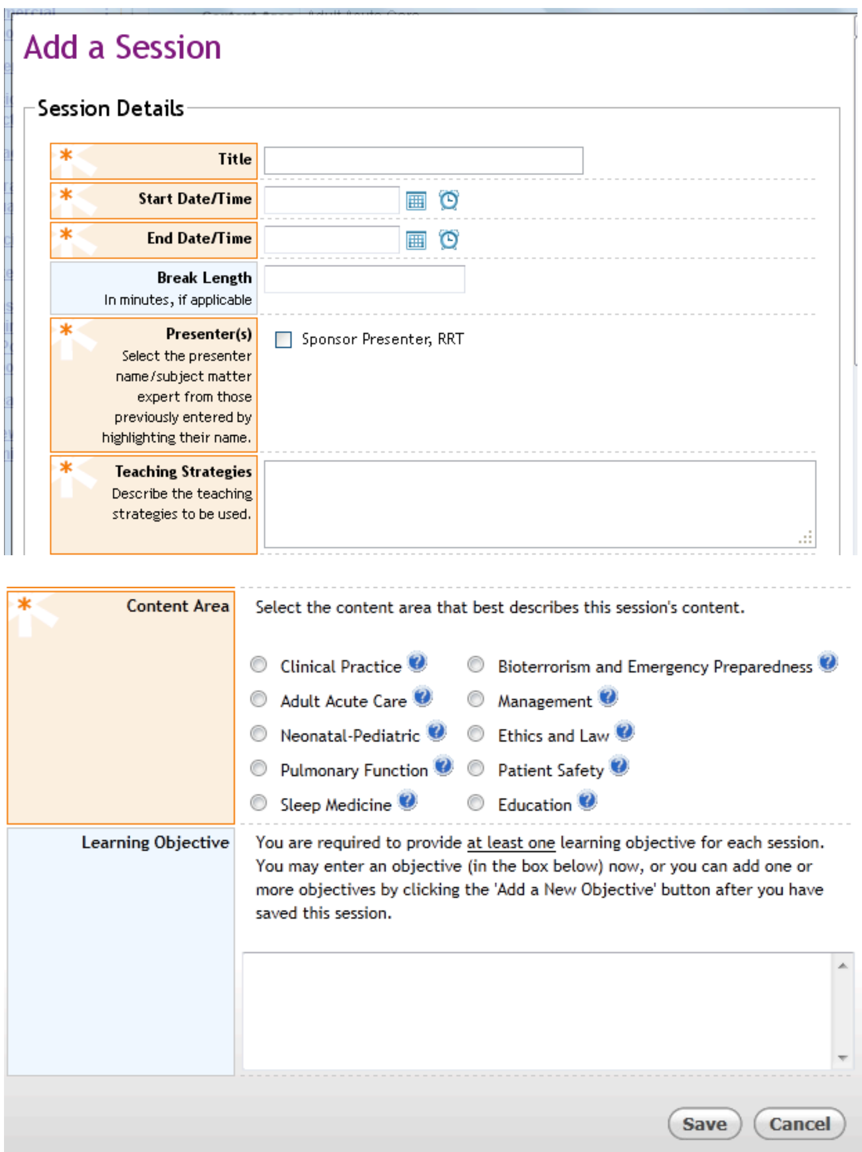
Click “Add a New Presenter” and the following screen appears:



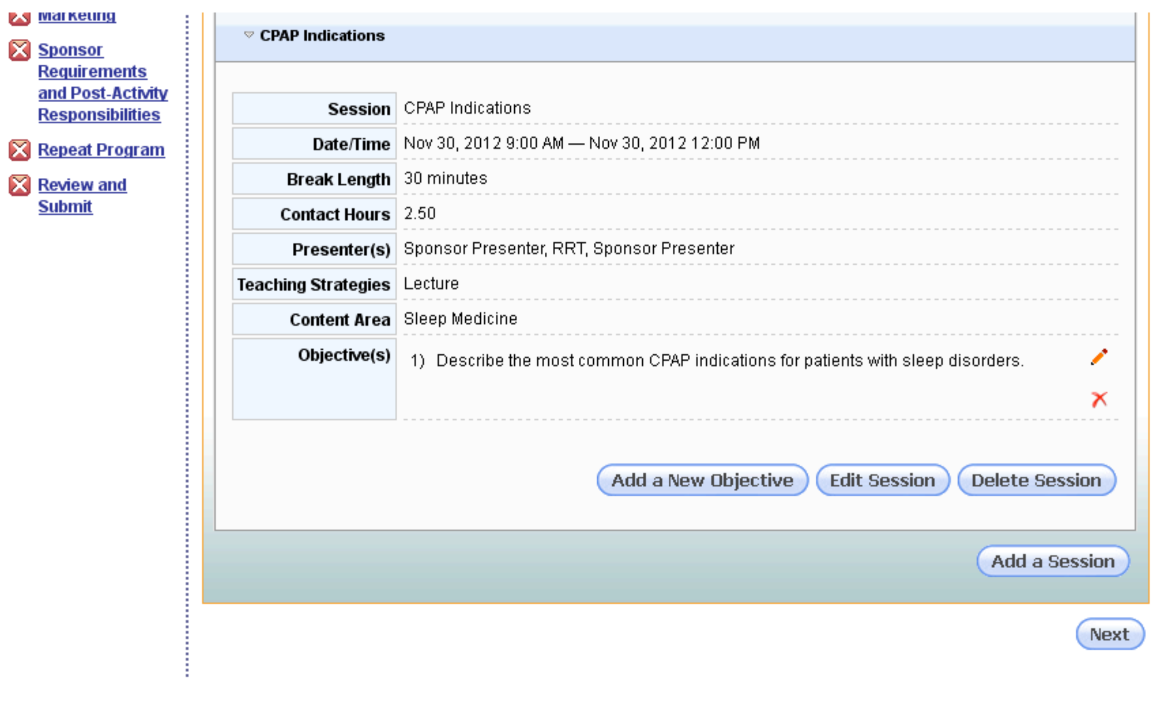
Here the same process is used to identify presenters as was used to identify members of the planning committee. Begin by entering the name of the presenter and click “Search” to determine if they are already in the database. You will follow the same procedures as described in the Planning Committee section of this document. You should enter all of the presenters for your program. You will be able to select and assign them to specific presentations that you will identify later in the application. When all presenters have been entered, click Next. The following screen will appear as you advance to the sessions and objectives part of the application.

Sessions and Objectives

Begin entering your learning sessions by clicking on “Add a Session”. The following screen appears:

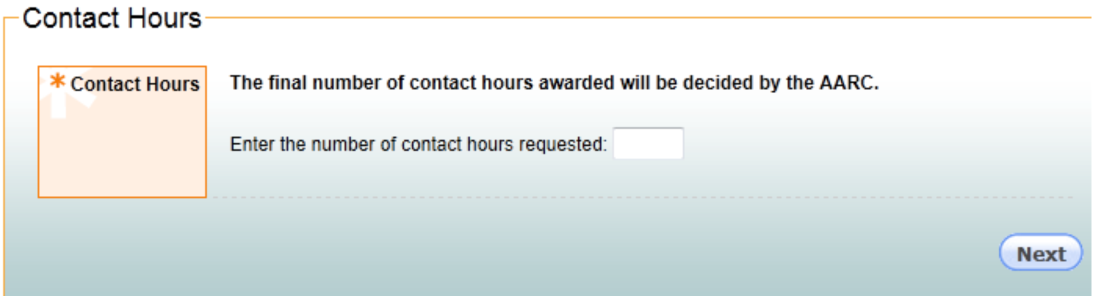


Enter the title of your learning session. Click on the calendar icon then select day the session is be offered. Click on the clock icon to select a starting time for the first session (you can manually type to adjust the time). If there is a break during the session, report the length of the break in minutes as instructed. Breaks occurring before or after a session need not be entered. The beginning, ending and break times reported will be used to calculate instructional time and automatically determine the number of CRCE contact hours awarded to your session. Select your presenter(s) from those whom you have previously entered in the Presenters section. Check all participating in that session. If you need to add additional presenters you must return to the Presenters section to add them. Describe the teaching strategies you will employ for this session (e.g. lecture, panel discussion, etc). Select the content area that best describes the information being presented from the available choices. Definitions of each choice are revealed by clicking on the "?" icon by each choice. Again the descriptions provided by clicking on the "?"icons will provide guidance in selecting the appropriate content area modifier. Final assignment of content areas will be made by the AARC reviewer during the review process. You must provide at least one learning objective stated in behavioral terms for each objective. Click on the "Save" button after all information has been entered. Based on the information entered for this example program the following screen appears:



Note the information entered for the session can be edited by clicking on "Edit Session". The session can also be deleted by clicking on "Delete Session". The objective can be edited or deleted by selecting the appropriate icon within that field. Additional objectives can be added by clicking on “Add a New Objective”. Additional sessions can be added by clicking on “Add a Session”.

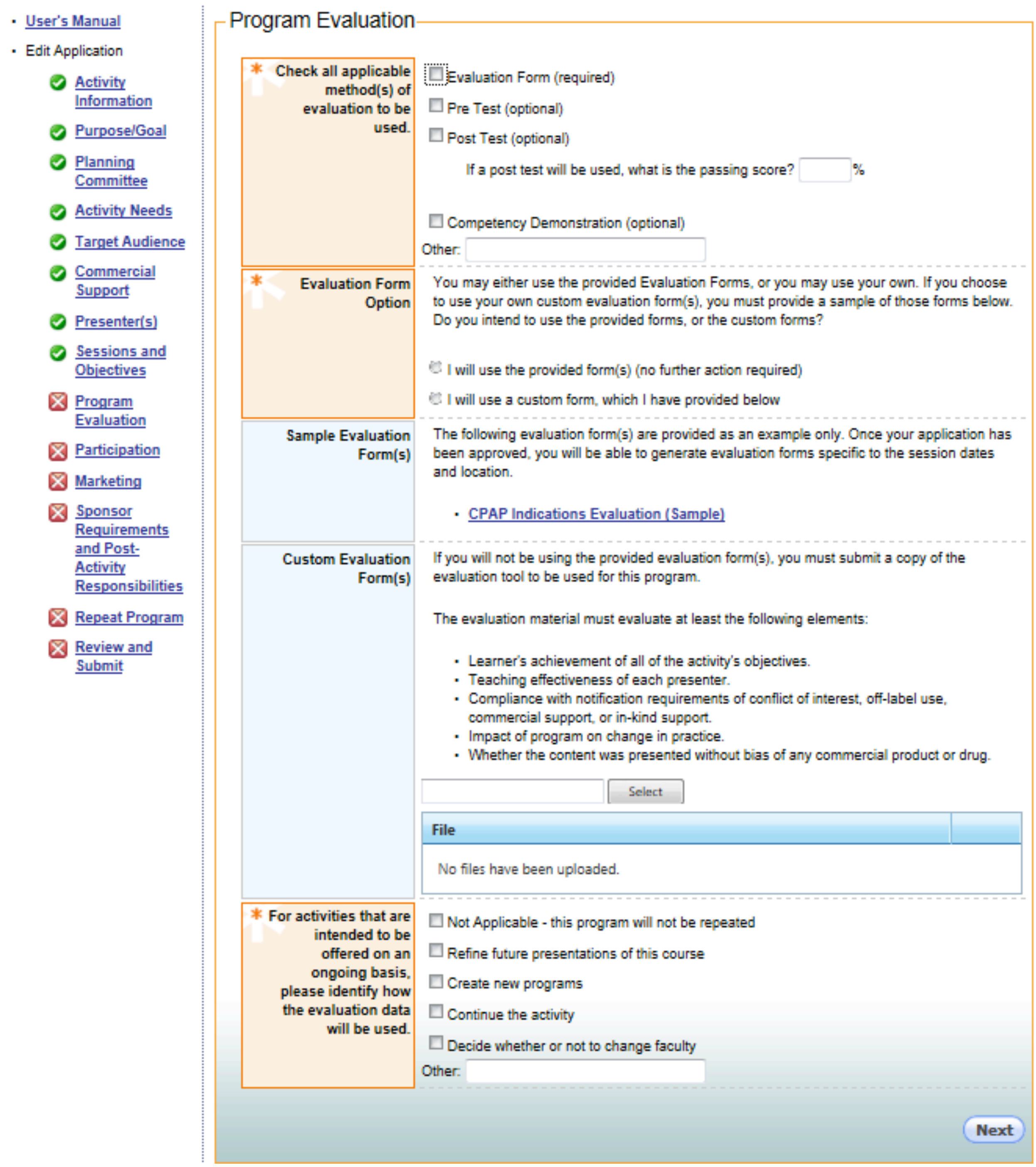
Click on “Next to access the following screen:



Enter the total CRCE contact hours requested for the course. Note that the total hours for each session are calculated in the session detail screens. The AARC makes the final determination of total contact hours.

Clicking on “Next” will take you to the Program Evaluation section.

Program Evaluation

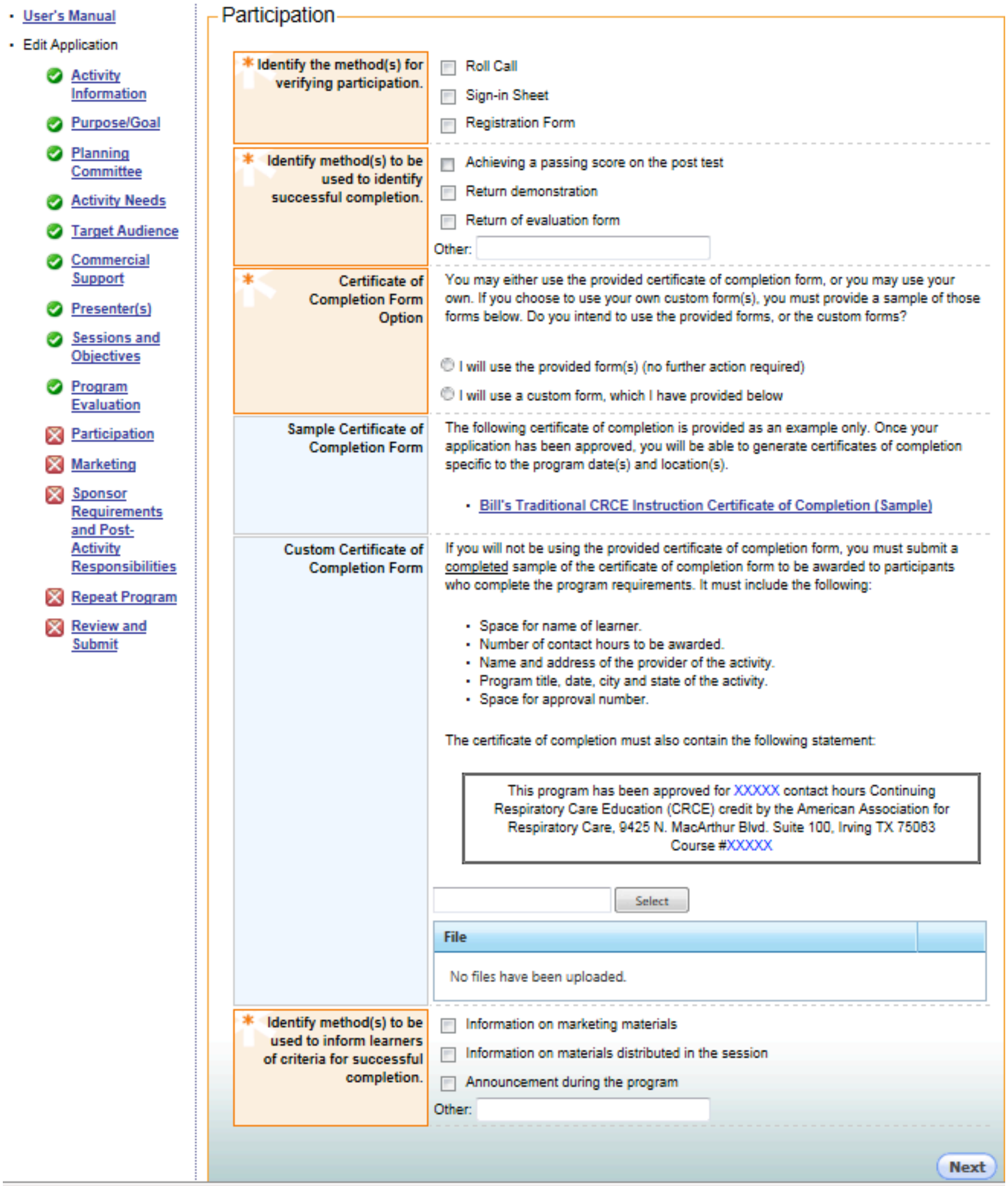


In the Evaluation Methods section of this screen click note that Evaluation Form is required for all programs. If using additional optional methods of evaluation indicate them here. In Evaluation Form Option you must indicate whether you will be using (1) the template evaluation provided and contains the required information based on the session and speaker information you provided thus in the application or (2) a custom evaluation form you will design and submit with your application. In making this decision realize that should you choose the template, a separate evaluation form is provided for each session. Thus the use of the template evaluation provided with the application may be impractical for programs that offer many sessions. You can preview this sample form(s) by clicking on the hyperlink(s) in the next section. If you select the Sample Evaluation Form the Sample Evaluation Form(s) and Custom Evaluation Form(s) will disappear leaving the last section in which you click on the appropriate descriptions of how the evaluation data will be used in future offerings of this course. If the course will not be repeated indicate that by checking the first box.

If you choose to submit a custom evaluation form, you must upload that form from your computer by clicking the “Select” button. This will enable a search of your computer directory and the selection of the desired file. The selected file will appear on the screen and will be submitted along with your application. Be sure the title of the document contains the word “evaluation”.

Click “Next” to access the Participation part of the application.

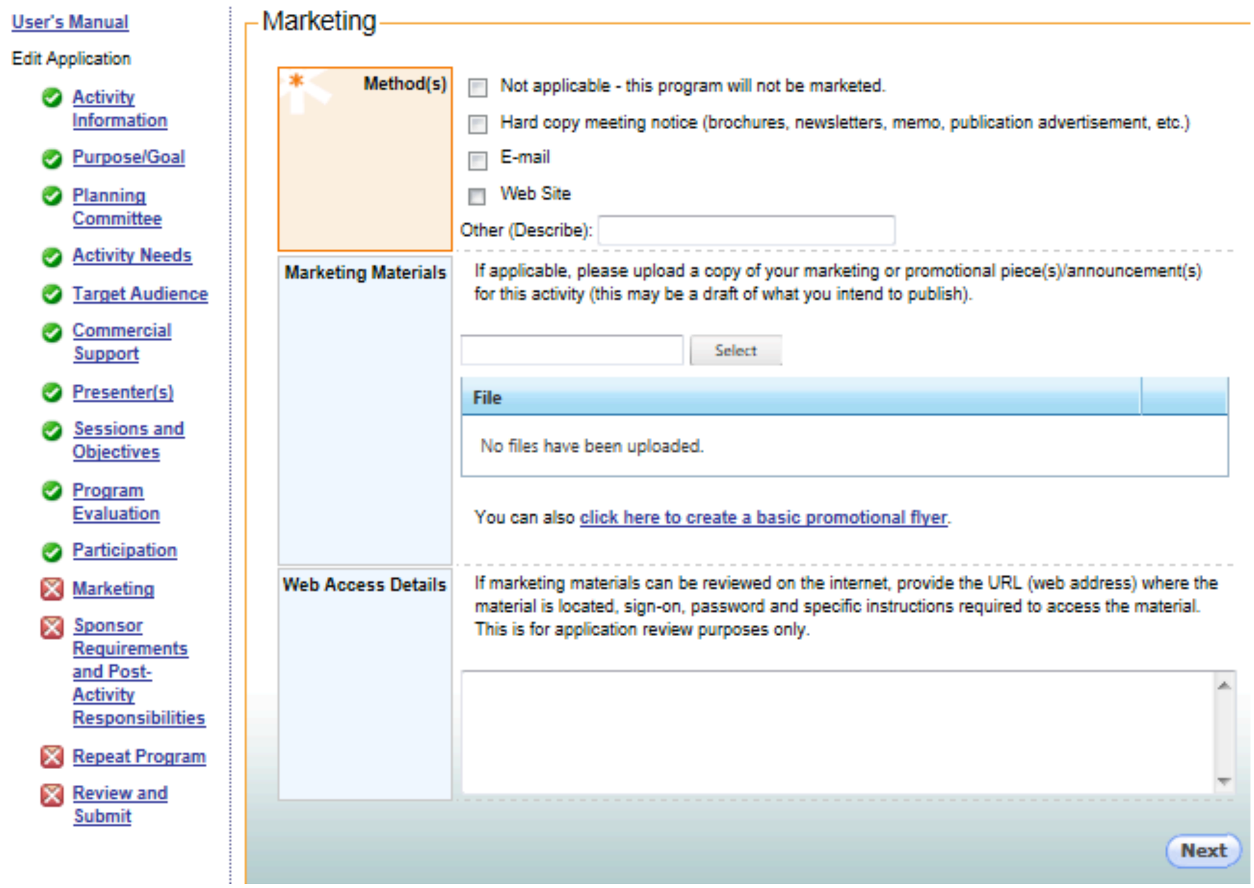
Participation



After selecting the method(s) for verifying participation and successful completion of the program, choose a Certificate of Completion option. The first option is to choose the Certificate populated with information provided in the application. You can preview this by clicking on the hyperlink in the next section. If you choose this option, the choices on the screen will collapse and you need only select the method(s) used to describe how learners will be informed of the criteria for successful completion of the program. Should you choose to submit a custom designed form you must upload that form from your computer by clicking the “Select” button. This will enable a search of your computer directory and the selection of the desired file. The selected file will appear on the screen and will be submitted along with your application. Be sure title of the document contains the word “certificate”.

Click “Next” to access the Marketing part of the application.

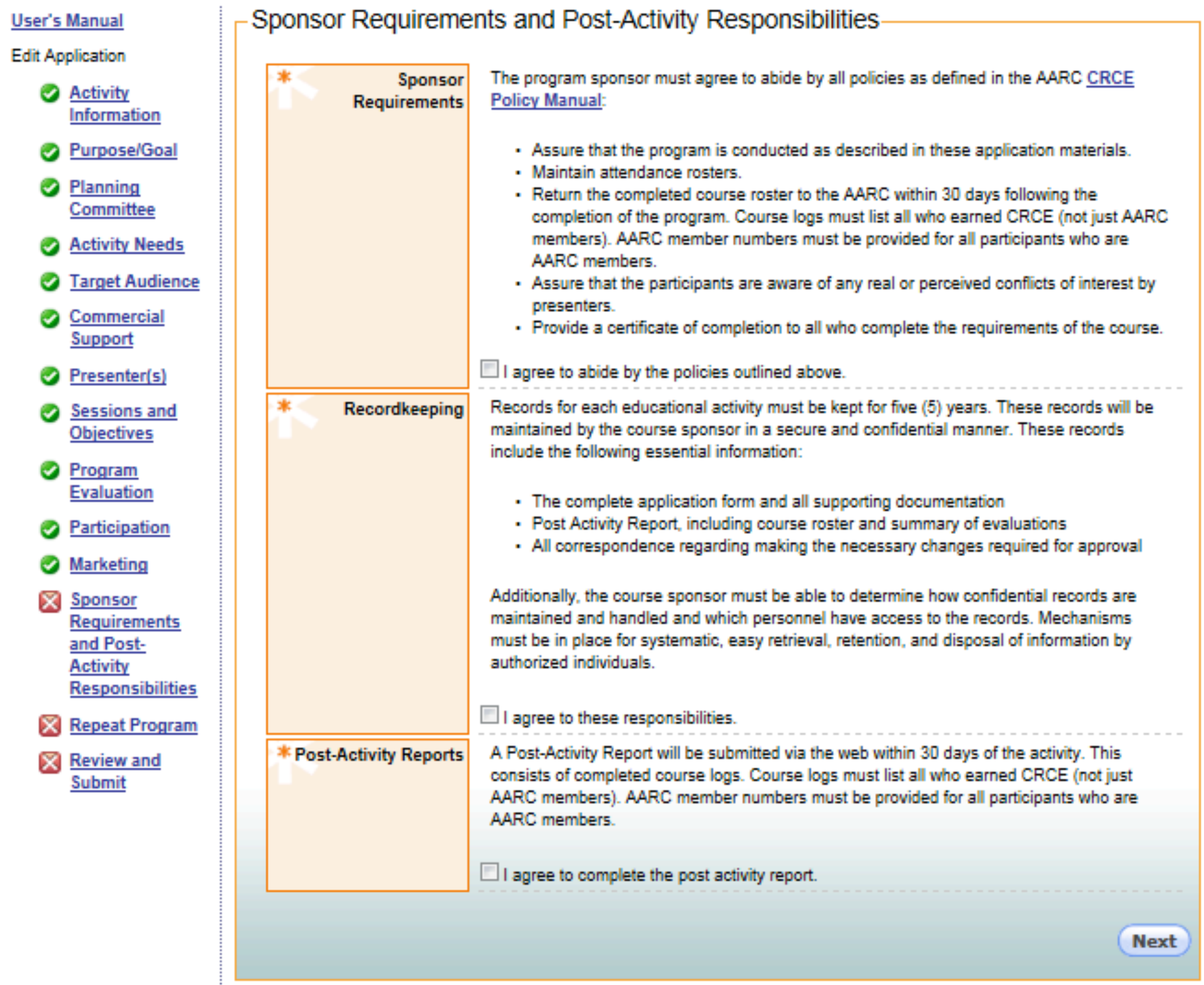
Marketing



If this program will not be marketed, indicate this by clicking the first box in the Method(s) section. If it will be marketed, indicate the method(s) by checking the appropriate box(s). If promotional materials are used to market the program, upload the documents describing them by clicking on the “Select” button. This will enable a search of your computer directory and the selection of the desired file. The selected file will appear on the screen and will be submitted along with your application. Be sure title of the document contains a description of the document and the word “marketing”. If marketing messages will appear on the internet provide the URL and any required access information.

Click “Next” to access the “Sponsor Requirements and Post-Activity Responsibilities” part of the application.

Sponsor Requirements and Post-Activity Responsibilities



User's Manual

Edit Application

- Activity Information
- Purpose/Goal
- Planning Committee
- Activity Needs
- Target Audience
- Commercial Support
- Presenter(s)
- Sessions and Objectives
- Program Evaluation
- Participation
- Marketing
- Sponsor Requirements and Post-Activity Responsibilities
- Repeat Program
- Review and Submit

Sponsor Requirements and Post-Activity Responsibilities

*** Sponsor Requirements**

The program sponsor must agree to abide by all policies as defined in the AARC CRCE Policy Manual:

- Assure that the program is conducted as described in these application materials.
- Maintain attendance rosters.
- Return the completed course roster to the AARC within 30 days following the completion of the program. Course logs must list all who earned CRCE (not just AARC members). AARC member numbers must be provided for all participants who are AARC members.
- Assure that the participants are aware of any real or perceived conflicts of interest by presenters.
- Provide a certificate of completion to all who complete the requirements of the course.

☐ I agree to abide by the policies outlined above.

*** Recordkeeping**

Records for each educational activity must be kept for five (5) years. These records will be maintained by the course sponsor in a secure and confidential manner. These records include the following essential information:

- The complete application form and all supporting documentation
- Post Activity Report, including course roster and summary of evaluations
- All correspondence regarding making the necessary changes required for approval

Additionally, the course sponsor must be able to determine how confidential records are maintained and handled and which personnel have access to the records. Mechanisms must be in place for systematic, easy retrieval, retention, and disposal of information by authorized individuals.

☐ I agree to these responsibilities.

*** Post-Activity Reports**

A Post-Activity Report will be submitted via the web within 30 days of the activity. This consists of completed course logs. Course logs must list all who earned CRCE (not just AARC members). AARC member numbers must be provided for all participants who are AARC members.

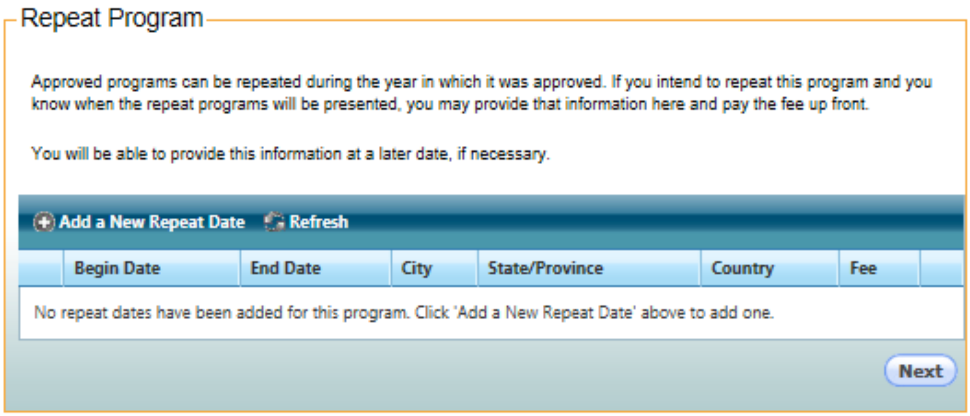
☐ I agree to complete the post activity report.

Next

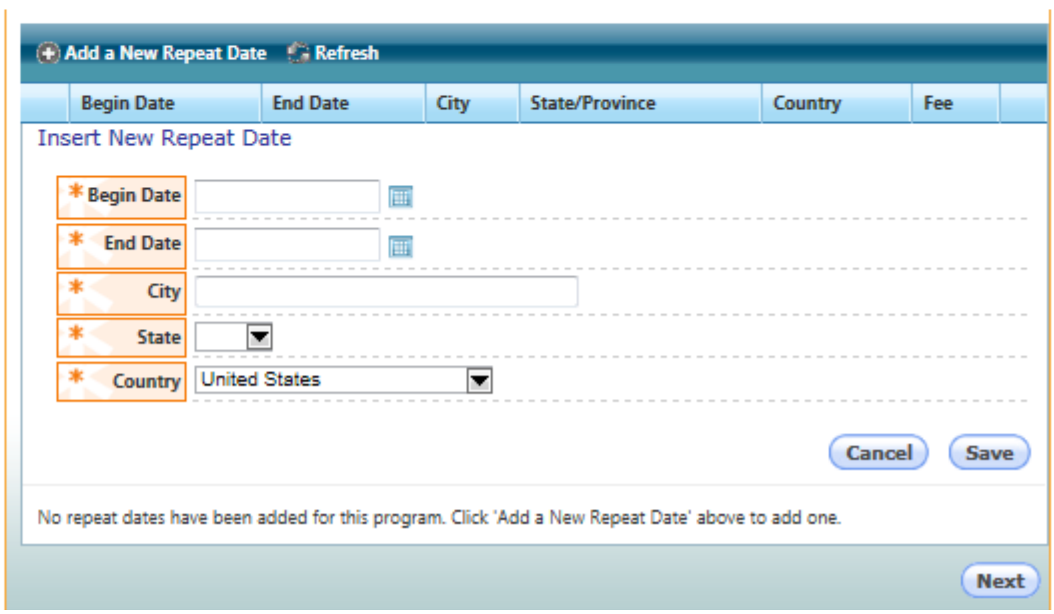
On this screen, carefully review each section and indicate the course sponsor's intended compliance by checking each box.

Click “Next” to access the “Repeat Program” part of the application.

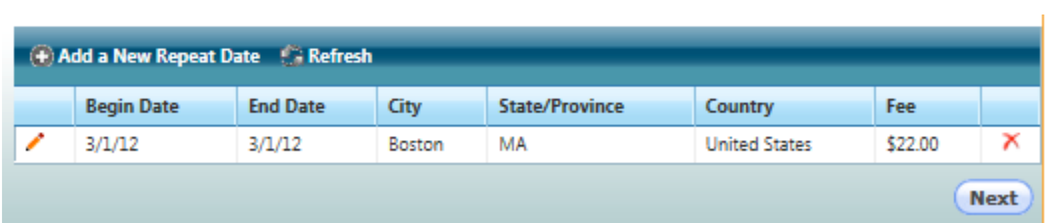
Repeat Program



This provides the option to establish repeat dates at the time of initial application if desired. Repeat program dates can be added anytime during the accreditation period. To add a repeat date click on “Add a New Repeat Date” and the following screen will appear:



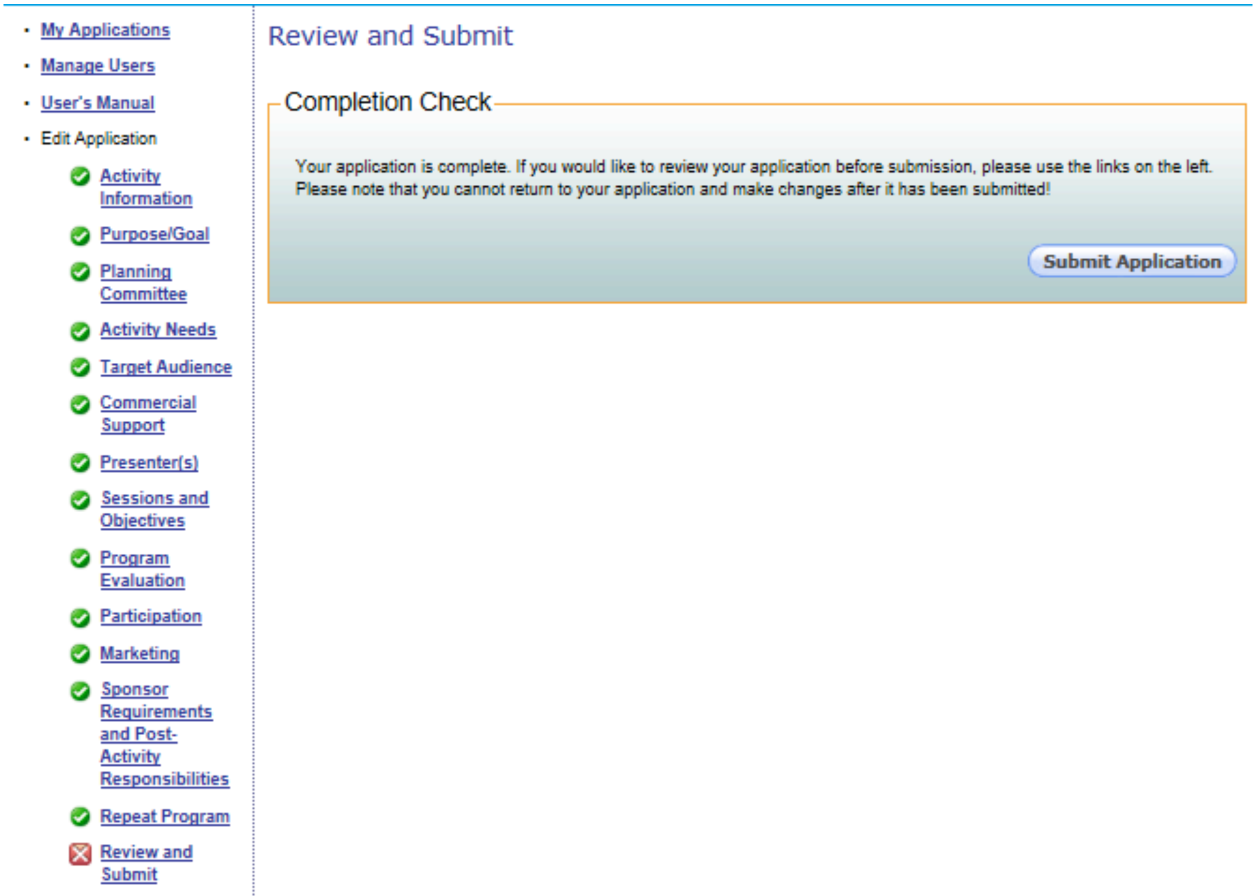
Click on the Calendar icons to select the beginning and ending date of the program. Enter the city and state where the program is being presented and click on “Save”. This screen shows the information entered for this example:



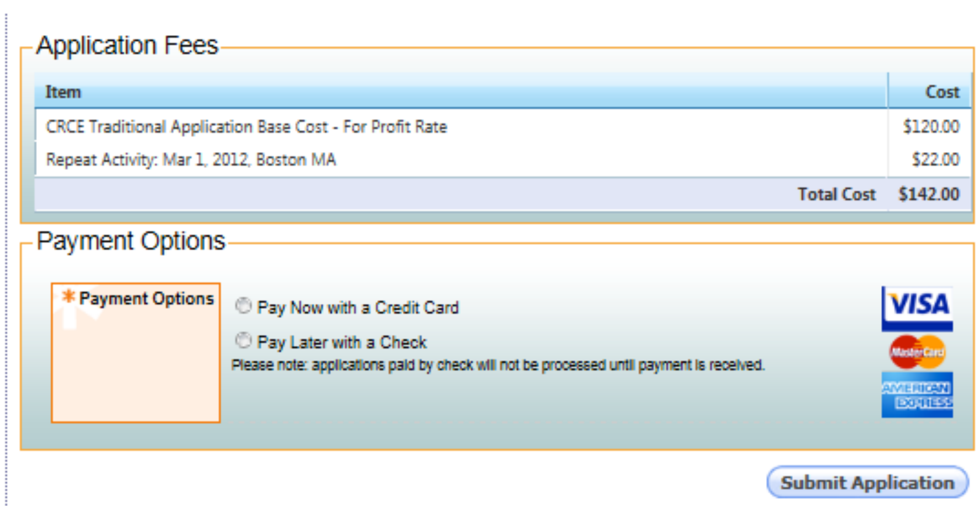
This repeat program can be edited prior to submission of the application by clicking on the pencil icon or deleted by clicking on the red x.

Click “Next” to access the “Review and Submit” part of the application.

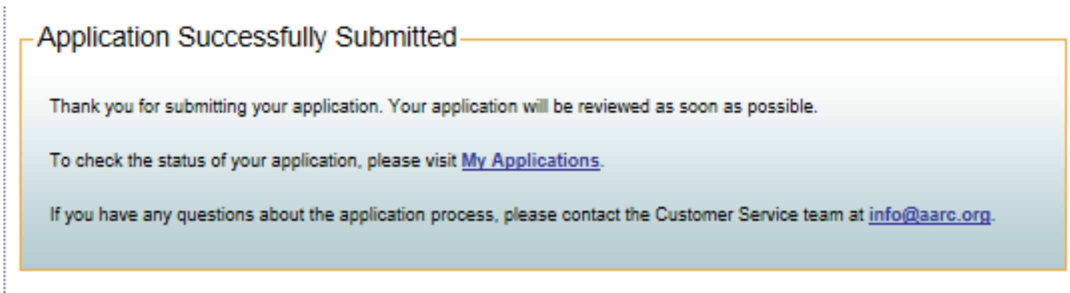
Review and Submit



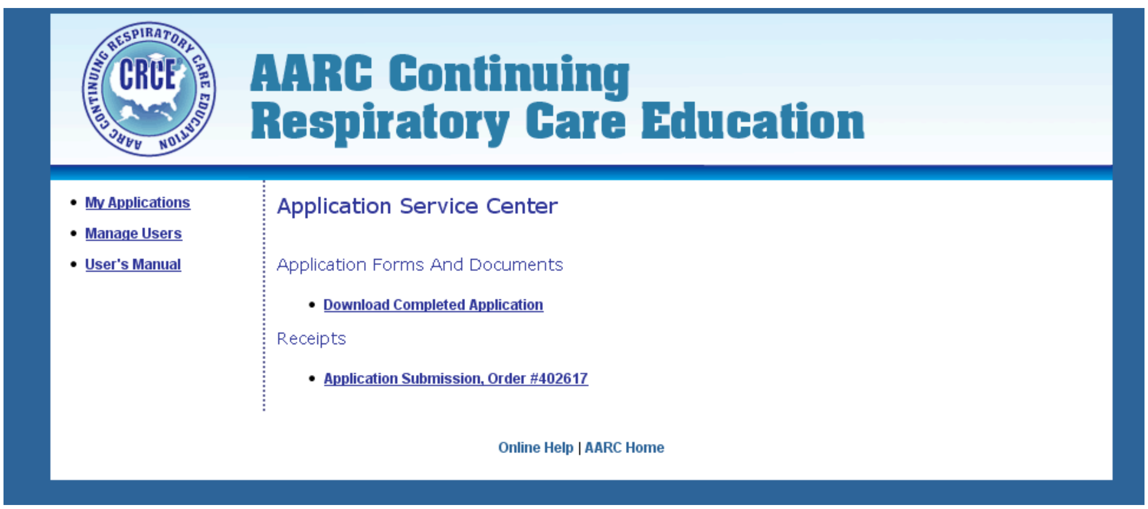
The application is now ready for submission. You may review any section of the application by clicking on the menu along the left side of screen. The application can be edited any time prior to submission. Click on "Submit Application" to move to the payment process.



Application fees are calculated based on For Profit/Not-For-Profit federal tax status, the number of CRCE contact hours approved for the program, any applicable late fees and repeat programs. After reviewing and confirming the accuracy of the charges, choose a payment option then click on Click on “Submit Application”. The following verification will appear and the key contact will receive an email to verify submission.



Click on “My Applications” to access the Application Service Center where you can download an invoice or receipt.



Clicking on “Application Submission” will download a receipt or invoice.

If you are paying by check please submit a copy of your invoice with the check.

You will immediately receive an email message acknowledging the receipt of your application.