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# Guidance Document for Vendors

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Pro**Cert** Continuing  
Competence Certification

Conference

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FSBPT

Federation of State Boards of  
Physical Therapy

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## Purpose of this Guidance Document

***The FSBPT strongly recommends that this document be reviewed prior to initiating any activity submission, and that it be used as a resource document during the submission process.*** The purpose of this document is to provide assistance to physical therapy continuing competence activity providers for the submission requirements of **ProCert**, the certification program of the Federation of State Boards of Physical Therapy (FSBPT). The information in the Guidance Document is your best resource for preparing and submitting your activity for certification review. **ProCert's** requirements and process are different from other certification or approval options for continuing competence activities; ideally activities are developed in accordance with **ProCert** requirements and this guidance. Familiarity with the content and development of the activity – or access to the person(s) responsible – are also critical to the process.

## Why Did FSBPT Launch a Continuing Competence Initiative?

Patients have every right to assume that a health care provider's license to practice is the regulating body's assurance of his or her current professional competence. Clinicians themselves would like assurance that those with whom they practice are current and fully competent. Additionally, physical therapists (PTs) and physical therapist assistants (PTAs) would like to have a method to evaluate options for maintaining their continuing competence.

Physical therapy licensing boards – FSBPT's members – have significant responsibility to the public in this area as they are required by law to ensure PTs and PTAs licensed to practice in their state continue to be competent throughout their career. As directed by these members, FSBPT developed **ProCert** as a comprehensive continuing competence activity certification program to evaluate the content of continuing competence activities for purposes of awarding certification.

## FSBPT Standards for Continuing Competence Activities

The [Standards for Continuing Competence Activities](#) ("Standards") are the foundation for the assessment of continuing competence activities. After collecting over 200 survey responses from stakeholders and additional review by the FSBPT Continuing Competence committee, FSBPT approved the Standards. The Standards have been validated as being applicable to all types of continuing competence activities. Not all Standards are required for certification to be granted. In addition to the Standards, the Committee established measurable, objective criteria for each Standard which will be used to gauge and measure the quality of the activity. Highly trained reviewers will determine whether or not the criteria have been met and will give feedback to the vendor. Those Standards that are required have required criteria.

## Purpose of ProCert Certification

**ProCert** evaluates continuing competence activities used to meet licensure renewal requirements in several U.S. jurisdictions. Activity value is measured by the extent to which the activity meets the standards to support the ongoing competence of the PT or PTA. The most current list of state licensing boards that accept or recognize FSBPT certification is evolving and can be verified by contacting FSBPT: [competencestaff@fsbpt.org](mailto:competencestaff@fsbpt.org).

## VENDOR SUBMISSIONS:

Conference and activity providers are referred to as "vendors" for purposes of the certification submission process. **The documentation that a vendor provides with the certification submission is vitally important. It is the sole means for the vendor to justify whether or not a standard and its criteria have been met. The reviewers will only evaluate documentation submitted by the vendor to make a decision regarding certification and will not look elsewhere for justification or supporting documentation (i.e. independently look to an Internet site, contact you for clarification, etc).** For example, if your website has all the information that would meet the requirement for a standard or criterion, you must upload the page or that information into aPTitude. The reviewers **WILL NOT** go to your website for the information. Additionally, the reviewers will only be looking for documentation to support the claims the vendor has

made with a certification submission; additional standards or criteria met that the vendor did not identify will not be credited. The reviewers will accept the claims by the vendor as credible and true; however in the event that the vendor certifies this standard has been met but over the course of the review the reviewers find there is evidence to dispute the vendor's claim, the review may be negatively impacted.

#### **FUTURE SUBMISSIONS:**

This version of the Guidance Document contains the most complete and accurate information regarding the submission requirements for **ProCert** certification at this time. FSBPT reserves the right to make modifications to the requirements in the future including adding additional standards and/or criteria, modifying documentation requirements, making optional standards or criteria required, or requiring additional documentation.

**PARTICIPANT FEEDBACK:** Another "check" on the **ProCert** certification system, specific to the validity of vendor's claims, comes in the form of activity feedback submitted by actual participants. User-generated comments provide a strategy for substantiating information that vendors supply with activity certification submissions. In addition to rating activities based on a 5-star system, users may post to any recorded activities their narrative comments that are accessible to all other users. Monitoring of this user-generated feedback by FSBPT staff and volunteers will augment other quality assurance efforts associated with certified activities.

#### **CURRENT AND RELEVANT MATERIALS AND REFERENCES**

FSBPT acknowledges the expense in updating existing course materials to reflect changes made to meet the requirements for certification. As long as the changes made to these materials (such as the wording of the objectives) do not create substantive changes to the activity itself, then it is permissible to supply the updates separately to the participants without re-printing of the original promotional materials. **Any changes, including new behavioral objectives, must be presented to participants before or during the activity. The vendor must upload for review an addendum with any modifications/edits. The vendor is required to have updated promotional materials and updates on all submitted documentation at the time of re-certification.**

The expectation is for activity providers to stay current with regard to the material that is being presented, taught, and assessed. Although some of the best (and sometimes only) research in the physical therapy field is older, most often it would be expected to see references that are less than 5 years old. Additionally, as the physical therapy field and health care evolves, course materials should be updated. If a developer/provider continues to use only the same materials for any activity that were used more than 5 years ago, the reviewer should look more closely to determine if that information is the most current and relevant.

#### **Tips for Starting a ProCert Submission**

1. **PERSONNEL:** Some Standards and Criteria require more than administrative knowledge of the activity. Access to, and consultation with persons with development and content knowledge of the activity will be necessary in order to properly justify credit for specific Standards and Criteria. This may be a change from your current methods of preparation.
2. **WHICH CRITERIA SHOULD I SELECT?:** Refer to the Typical Activity Standards & Criteria Guide in this document as this is a tool to guide you in terms of determining the likelihood specific criterion will be applicable for your specific activity type).
3. **GUIDANCE DOCUMENT:** Have this Guidance Document handy to use as a reference.
4. **PREPARE DOCUMENTATION:** Organize all of the documentation that you believe you will be submitting to support your application, and **any screenshots or webpage text**. (Reviewers WILL NOT go to your webpage even if given a link). Remember to clearly state for the reviewers what particular information is being used to meet the criterion and where in the document specifically it can be found. Taking the time to complete your submission this way will greatly increase the likelihood of the reviewer approving your request for credit for that criterion. All documents MUST be submitted electronically via an upload to aPTitude.
5. **KEEP AN OPEN MIND . . . AND BEGIN!**

## **Evaluation of Conferences**

Conferences will be evaluated globally, not at the level of each individual session. In most standards, the vendor will be required to submit proposal requirements for a session to be accepted for presentation at the conference.

At this time conferences are eligible for credit in a limited number of Standards and Criteria. **Vendors will not be required to fill out a content analysis for conferences (Standard 6) as they would for other activity types.** For purposes of Standards 6, all conferences will have a set content score of 2. These restrictions were based on the traits of a typical high quality conference and what might be reasonably expected from this type of activity. Vendors are required to supply the total time of the conference in hours.

The vendor must supply the appropriate documentation for a full certification review. The activity will receive credit only for those Standards and Criteria in which credit is earned. After careful consideration of the Standards and Criteria, the determination was made that the majority of conferences could reasonably meet ALL required Standards and Criteria as well as have the potential to meet the following value added Standards and Criteria:

Standard 9 Engagement: a, b, and c (self reflection, informal interaction, structured interaction)

Standard 10 Evidence Based Practice: b, d, and e (case studies by instructor, examine types of evidence, examine scientific literature)

Standard 12 Activity Design: a (design supports achievement of objectives)

Standard 14 Review and Evaluation: a (participant feedback) c (made changes- coming in system soon)

**Conferences do not automatically get credit for all the required and value added Standards and Criteria above.** Reviewers will complete a full review of the conference confirming that all Standards and Criteria claimed are indeed met. Deficiencies or discrepancies will be handled and reported in the same manner as any other activity type review.

Individual sessions may be submitted for certification as continuing education Conferences if the vendor chooses to do so.

**AT THIS TIME, CONFERENCES ARE NOT ELIGIBLE FOR CREDIT IN ANY OTHER STANDARD/CRITERIA EXCEPT FOR THE ABOVE.**

**AT THIS TIME, CONFERENCES MUST BE IN-PERSON ACTIVITIES TO BE ELIGIBLE FOR PROCERT CERTIFICATION.**

## Activity Details

Vendors are required to enter the amount of time for the conference in hours. Vendors should determine the time of a conference as a reflection of the time dedicated to educational programming related or applicable to physical therapy as defined by the FSBPT Model Practice Act. Time spent during the conference that is not educational, even if relevant to the practice of physical therapy such as the exhibition hall hours, organization policy sessions (networking and job- seeking, class reunions, section business meetings, or financial planning sessions (including the House of Delegates/Delegate Assembly)) should not be included in the total time for the conference. Use the Determining Time Chart below for calculations.

If a reviewer notices a discrepancy or problem with the time entered by the vendor, it will be noted it in Standard 5. This is unique to the review of conferences.

### **Determining Time of the Activity**

Minutes above full Hour	Rounding Guidance	Example
0-7 minutes	Round Down to 0 minutes	Activity is 6 hours and 6 minutes Total Time reported: 6 hours
8-14 minutes	Round Up to 15 minutes	Activity is 6 hours and 12 minutes Total Time reported: 6 hours and 15 minutes
15-22 minutes	Round Down to 15 minutes	Activity is 6 hours and 21 minutes Total Time Reported: 6 hours and 15 minutes
23-29 minutes	Round Up to 30 minutes	Activity is 6 hours and 23 minutes Total Time Reported: 6 hours and 30 minutes
30-37 minutes	Round Down to 30 minutes	Activity is 6 hours and 35 minutes Total Time Reported: 6 hours and 30 minutes
38-44 minutes	Round Up to 45 minutes	Activity is 6 hours and 44 minutes Total Time Reported: 6 hours and 45 minutes
45-52 minutes	Round Down to 45 minutes	Activity is 6 hours and 50 minutes Total Time Reported: 6 hours and 45 minutes
52-59 minutes	Round UP to nearest whole hour	Activity is 6 hours and 52 minutes Total Time Reported: 7 hours

**STANDARD 1: ADMINISTRATION**

A) STANDARD

1. The continuing competence provider has established processes for developing, administering and documenting the activity.
  - The provider identifies and provides a supportive learning environment, the physical, material, and technological resources necessary to support the activity
  - Documentation is maintained of the processes used to develop, administer, deliver, conduct and assess the activity and participants.
  - The provider maintains cumulative records with appropriate security for a period of five years

B) CRITERIA- REQUIRED

<p>1a. The provider maintains information on the development, administration and documentation of the activity.</p> <ul style="list-style-type: none"> <li>-The provider identifies and provides a supportive learning environment, the physical, material, and technological resources necessary to support the activity</li> <li>-Documentation is maintained of the processes used to develop, administer, deliver, conduct and assess the activity and participants.</li> <li>-The provider maintains cumulative records with appropriate security for a period of five years</li> </ul>	<p><b>REQUIRED</b></p>
<p><b>REQUIRED DOCUMENTATION</b></p>	<ol style="list-style-type: none"> <li>1. Justification Statement must contain: Vendor documentation of a description of the venue. The vendor must also identify and verify the availability of the specific resources (personnel, facilities, equipment, etc) required to achieve the objectives. Distinguish whether there is lab, lecture, or a combination learning environment.</li> <li>2. Upload: Copy of company policy on record privacy and storage</li> </ol>
<p><b>GUIDANCE</b></p>	<p>The provider of the CC activity is expected to provide what is needed for the participants to have a learning experience. Additionally, the vendor is expected to have record keeping procedures in place that will allow the vendor to communicate to the licensee or outside party that the participant took part in the activity. The vendor should maintain appropriate security to hold both confidential and non-confidential information appropriately. At minimum, the vendor should demonstrate the records policy and distinguish whether there is lab, lecture, or a combination learning environment.</p>
<p><b>EXAMPLES</b></p>	<p>If the activity specifically states participants will gain experience with a given technology, adequate access to the technology and adequate power sources must be available to allow all participants hands-on experience.</p> <p>A PT is being audited by his licensing board to ascertain whether he has met his CC/CE requirements for re-licensure and realizes that he has lost his attendance certificate from CC activity four years ago. The PT verifies his identity with the provider and a new certificate is e-mailed to him.</p>

C) CRITERIA - VALUE ADDED

N/A

D) RELATIONSHIP TO OTHER STANDARDS

**STANDARD 2: APPROPRIATE LANGUAGE**

A) STANDARD

2. The continuing competence provider uses language that does not show bias or cultural insensitivity

B) CRITERIA- REQUIRED

2a. The provider certifies the use of current terminology within the activity that does not show bias or cultural insensitivity.	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	Vendor affirms compliance with the Standard by checking the box.
<b>GUIDANCE</b>	<p>The intent of this standard is to communicate the importance of evaluating language and removing any bias or cultural insensitivity in the development, presentation, and administration of a continuing competence activity.</p> <p>In the event that the vendor certifies this standard has been met but over the course of the review the reviewer finds there is evidence to dispute the vendor’s claim, the reviewer should flag this standard for further review to determine the appropriate status.</p>
<b>EXAMPLES</b>	<p>Ideally, the vendor would incorporate people first language and be sensitive to cultural differences. People first language would include the following examples:</p> <p>Stroke patient- patient with a stroke            CP child- child with cerebral palsy            Cancer victim- person with cancer            Handicapped person- person with a disability</p> <p>Example of potential bias/cultural insensitivity: This Conference is not appropriate for females from cultures requiring a chaperone. Each participant must be able to fully participate; we are unable to accommodate this type of need.</p>

C) CRITERIA - VALUE ADDED

N/A

D) RELATIONSHIP TO OTHER STANDARDS

**STANDARD 3: NON-DISCRIMINATORY**

A) STANDARD

3. The continuing competence activity is available to all appropriate participants without unlawful discrimination.

B) CRITERIA- REQUIRED

3a. The provider certifies that the activity is available to all appropriate participants without unlawful discrimination.	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	Vendor affirms compliance with the Standard by checking the box.
<b>GUIDANCE</b>	<p>The intent of this standard is to communicate the importance that all rules and laws regarding discrimination should be followed in the development, presentation and administration of a continuing competence activity. While acknowledging that a given activity may have restrictions based on appropriateness to the educational preparation, target audience, qualifications, etc., these restrictions cannot be based on unlawful discrimination.</p> <p>In the event that the vendor certifies this standard has been met but over the course of the review the reviewer finds there is evidence to dispute the vendor’s claim, the reviewer should flag this standard for further review to determine the appropriate status.</p>
<b>EXAMPLES</b>	<p>Appropriate participants- Level 3 Conference requiring participants to have first completed Level 1-2</p> <p>Restricted to physical therapists only</p> <p>Inappropriate examples: Male PTs restricted from a women’s health Conference</p>

C) CRITERIA - VALUE ADDED

N/A

D) RELATIONSHIP TO OTHER STANDARDS



**STANDARD 4: COPYRIGHT AND DISCLOSURE**

A) STANDARD

- 4. Each continuing competence activity provides copyright and disclosure information
  - Copyright permissions of materials developed by others are identified on all audio-visual and activity materials
  - Copyrights of materials that are authored by the developers or instructors are identified on all audio-visual and Conference materials
  - Disclosure information regarding potential conflicts of interest and financial gain is identified and supplied to potential participants

B) CRITERIA- REQUIRED

4a. The provider must certify that appropriate permissions of copyright materials have been obtained, all copyright materials have been identified, and disclosures have been made.	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	Vendor affirms compliance with the Standard by checking the box.
<b>GUIDANCE</b>	<p>The intent of this standard is to communicate both the importance that all rules and laws regarding copyright protections should be followed in the development, presentation, and administration of a continuing competence activity and the necessity to make participants aware of any potential conflicts of interest or financial gain which may be derived by the presenter or developer directly because of the activity. Some information regarding the appropriate use of copyright material and the doctrine of Fair Use Section 107 of the 1976 Copyright Act can be found at the U.S. Copyright Office <a href="http://www.copyright.gov/fls/fl102.html">http://www.copyright.gov/fls/fl102.html</a>.</p> <p>It is the vendor’s responsibility to ensure compliance with all relevant copyright laws and rules.</p> <p>Any disclosures related to conflict of interest should be included in information provided to potential participants. CC providers and presenters/authors must disclose any known potential for conflict of interest or appearance of conflict. Material gain through any product or service should be addressed during the CC activity.</p> <p>In the event that the vendor certifies this standard has been met but over the course of the review the reviewer finds there is evidence to dispute the vendor’s claim, the reviewer should flag this standard for further review to determine the appropriate status.</p>
<b>EXAMPLES</b>	<p>An instructor plans to hand out full photocopies of several journal articles to support the Conference content. He/she must first determine if this would be an infraction of copyright law. The instructor may choose to share a bibliography instead.</p> <p>A conference on PTs and Imaging is sponsored and underwritten by the ultrasound machine manufacturer. It is necessary for the instructor/developer to inform participants of this fact.</p>

C) CRITERIA - VALUE ADDED

N/A

D) RELATIONSHIP TO OTHER STANDARDS

**STANDARD 5: CONTENT**

A) STANDARD

5. Content within the continuing competence activity is relevant to the physical therapy profession and the designated audience(s)

B) CRITERIA- REQUIRED

<p>5a. Content of the activity must relate to the scope of practice of physical therapy as defined by the FSBPT Standards of Competence, NPTE Content Outline, American Physical Therapy Association(APTA) Guide to Physical Therapist Practice, PT and PTA Normative Models for Education, American Physical Therapy Association Ethics Core Documents, descriptions of Specialty practice, state practice acts and regulations, The Model Practice Act and/or other relevant regulatory documents or other generally accepted professional standards.</p>	<p><b>REQUIRED</b></p>
<p><b>REQUIRED DOCUMENTATION</b></p>	<p>Justification Statement as to the focus of the activity and the relationship of the content to physical therapy practice</p> <p>Upload: Conference description and brochure; syllabus if applicable</p>
<p><b>GUIDANCE</b></p>	<p>For conferences only, reviewers will evaluate the vendor’s claim of the amount of time for the activity in this standard. If a discrepancy is found, reviewers will note in comments for 5a and fail this criterion (5a).</p>
<p><b>EXAMPLES</b></p>	<p>Multi-disciplinary conference on telehealth- Programming related to telerehab, licensure portability across state lines, proper documentation and billing, use of technology.</p> <p>Orthotics and Prosthetics conference: Focus of conference was on the fabrication of the prosthetic leg. Lab sessions were designed to allow participants to use fabrication equipment and devices. No education on fitting, function or care of the device. <i>Not appropriate for a physical therapist.</i></p>

5b. Content within the continuing competence activity is relevant to the targeted audience(s).		<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement must discuss why the targeted audience was selected and the relevance of the information to the targeted audience. If a mixed audience, such as PTs/PTAs or multi-disciplinary, the statement must additionally explain why the content is appropriate for all participants. (Example: Why is a Conference that covers some evaluation still appropriate for PTAs?)</p> <p>Upload: Conference description and brochure; syllabus if applicable</p>	
<b>GUIDANCE</b>	<p>The vendor must specify the target audience and justify why the activity is appropriate for ALL members of the target audience. PTs may attend courses given by other professionals that while still appropriate; discuss non-PT techniques such as surgery. The same holds true for PTAs attending courses with PT information such as evaluation and treatment progression (it is still appropriate for the PTA to learn the information, however the vendor must be explicit with the explanation of the relevance of the content to all participant groups).</p>	
<b>EXAMPLE</b>	<p>Audience PT, PTA, OT, OTA, AT. This course is designed to present and review the basics of assessment, evaluation and treatment for patients who present following a stroke resulting in hemiplegia. All participants would use the materials according to State/jurisdictional regulations.</p> <ul style="list-style-type: none"> <li>• The PT and OT will benefit from all aspects of the course from initial evaluation through the development of an inter-professional Plan of Care (POC) as well as the introduction and practice of Evidence Based treatment techniques.</li> <li>• The PTA and COTA will benefit from the understanding of the components and theory behind the evaluation process, and experience in testing techniques as well as treatment methods which would be determined in the POC designed by the therapist.</li> <li>• The Athletic Trainer who encounters the patient with hemiplegia in community activities will benefit from an understanding of the condition and how the inter-professional POC can be incorporated into a training program.</li> </ul>	

C) CRITERIA - VALUE ADDED

N/A

D) RELATIONSHIP TO OTHER STANDARDS

- STANDARD 11: Behavioral Objectives
- STANDARD 12: Activity Design
- STANDARD 13: Assessment

**STANDARD 7: INSTRUCTOR/DEVELOPER/STAFF QUALIFICATIONS**

A)STANDARD

7. The developers and deliverers of the activity have documented experience, education and training to allow attendees to meet the activity objectives.

REQUIRED: Yes

B) CRITERIA- REQUIRED

7a.The developers and deliverers of the activity have documented experience, education and training to allow attendees to meet the activity objectives.	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: document the sponsoring organization or event management company as the “developer” and state why the developer is appropriate to host the conference</p> <p>Upload: the conference’s criteria used in regard to speaker qualification and selection to ensure subject matter expertise</p>
<b>GUIDANCE</b>	<p>The intent of this standard is to communicate the importance of qualified personnel being used during the development and presentation of a continuing competence activity. FSBPT certification requires that the vendor supplies information that supports the qualifications of the personnel involved.</p> <p><b>Conferences are not required to list every instructor unless they would like to do so.</b> If the vendor chooses to enter the individual instructors, appropriate information about each must be provided (Resume or CV uploaded).</p> <p>The conference should enter the sponsoring organization or event management company as the “developer” (i.e. APTA for Combined Sections Meeting) and list criteria used in regard to speaker qualification and selection.</p>
<b>EXAMPLES</b>	<p>Conference requires that instructors have ABPTS certification.</p> <p>Conference requires a minimum of 5 yrs and 5500 treatment hours in the area to be taught.</p> <p>Proposal Submissions: must include the instructor’s educational credentials, professional licenses, additional certifications, publications, teaching experience, and research in this topic area.</p>

C) CRITERIA - VALUE ADDED

N/A

D) RELATIONSHIP TO OTHER STANDARDS

**STANDARD 8: INFORMATION AND MATERIALS**

A) STANDARD

8. The Continuing Competence Provider furnishes clear, complete information to potential participants about the activity format and content, biography of the activity deliverer/presenter, and participant requirements.

B) CRITERIA- REQUIRED

8a. The provider supplies sufficient information to allow prospective participants to judge the value and appropriateness of the activity.	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: The vendor should communicate the specific information that would be furnished to potential and actual participants</p> <p>Vendor must communicate in pre-registration materials if there is an assessment with a proficiency standard in order to get credit for the Conference (example: 70% required on post-test to get the completion certificate)</p> <p>Upload: Brochure or Screenshot/.pdf of information available on website. A link to the website is unacceptable.</p>
<b>GUIDANCE</b>	<p>The reviewer should look that the major components and information about the activity have been communicated. The reviewer should determine if there is enough information for them to decide if they would want to attend that Conference.</p>
<b>EXAMPLES</b>	<p>Examples of information helpful to a licensee to evaluate a continuing competence activity includes (NOT ALL REQUIRED):</p> <ul style="list-style-type: none"> <li>▪ Title and description</li> <li>▪ An outline of the material covered within the activity and if appropriate, a specification of the amount of time designated to each content area</li> <li>▪ The activity objectives</li> <li>▪ A list of Conference presenters/authors with pertinent biographical information. This biographic information documents an author/presenter’s expertise as it relates to the CC activity content</li> <li>▪ If applicable, the number of contact hours</li> <li>▪ The target audience for the CC activity, including the prerequisite level of knowledge or skill necessary for participation (Basic, Intermediate, Advanced, Multi Level)</li> <li>▪ Costs and cancellation/refund policies</li> <li>▪ The methods of presentations/instructional design used, and the requirements for successful completion of the CC activity.</li> <li>▪ Methods of assessment of learning</li> <li>▪ Informed consent is included if the CC activity could present risk to the participant.</li> <li>▪ Prerequisite assignments and or learning are identified.</li> <li>▪ Any disclosures related to conflict of interest should be included in information provided to potential participants. CC providers and presenters/authors must disclose any known potential for conflict of interest or appearance of conflict. Material gain through any product or service should be addressed during the CC activity</li> <li>▪ Author/presenter bias and/or opinion is clearly stated as such</li> <li>▪ Ratio of teacher/students</li> </ul>

C) CRITERIA - VALUE ADDED -N/A

D) RELATIONSHIP TO OTHER STANDARDS

## **STANDARD 9: ENGAGEMENT**

### **A) STANDARD**

9. The continuing competence activity fosters the participant's learning and professional engagement through reflection, interaction, participation and/or contribution to the profession and its body of knowledge.

REQUIRED: YES

### **B) CRITERIA – REQUIRED**

Required to have one of the criteria below, any others will be value added to the CCU score:

- 9a. Activity includes structured opportunities for self-reflection and identification of growth opportunities
- 9b. Activity offers informal opportunities for interaction and/or feedback from other professionals
- 9c. Activity includes opportunities for participation through structured interactive opportunities

### **C) CRITERIA - VALUE ADDED**

Any additional criteria met beyond the required element above:

- 9a. Activity includes structured opportunities for self-reflection and identification of growth opportunities
- 9b. Activity offers informal opportunities for interaction and/or feedback from other professionals
- 9c. Activity includes opportunities for participation through structured interactive opportunities

**GUIDANCE FOR MEETING STANDARD:** The activity is required to meet one of the criteria below; meeting any other criteria will add value to the CCU score. Each element of an activity (e.g., lab session) can only be counted toward one of the criteria. In order to claim credit for more than one criterion, the vendor **MUST** identify an element of the activity for each criterion being claimed. For example: 9a (self assessment tool administered) and another element that meets 9c (lab session).

9a. Activity includes structured opportunities for self-reflection and identification of growth opportunities	<b>REQUIRED AND/OR VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: Vendor will need to identify when/how in the activity self-reflection is performed. Self reflection is careful thought about your own behavior, beliefs, strengths, and weaknesses.</p> <p>Upload: Conference schedule agenda, screenshot, something that shows the self-reflection component of the activity  * If a self-assessment tool/instrument is used it must be uploaded</p> <p>Upload: Any self-assessment tool/instrument used including professional portfolio. May be a tool created by the vendor for this purpose or an alternate tool. At minimum, the vendor created self-assessment tool must contain open ended questions as to:</p> <ol style="list-style-type: none"> <li>1. Why the participant chose the Conference</li> <li>2. How the information from the Conference relates to their practice</li> <li>3. How the information gained will change the participant’s behavior in the future</li> </ol> <p>These questions <b>cannot</b> be integrated into the Conference evaluation form.</p>
<b>GUIDANCE</b>	<p>The self-reflection opportunities must be structured in order to get credit for this criterion. The vendor will need to identify when/how in the activity self-reflection is performed. Self reflection is an assessment of the participant’s strengths/weaknesses and application to practice not an assessment of the material learned or the logistics of the activity.  <i>Self-assessment is not the same as the assessment (standard 13) to demonstrate learning or proficiency.</i></p>
<b>EXAMPLES</b>	<p>Development of a personal portfolio required for the activity</p> <p>Self-reflection questions/breaks after instruction modules</p>

9b. Activity offers informal opportunities for interaction and/or feedback from other professionals	<b>REQUIRED AND/OR VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: Vendor specifies where the opportunities for interaction take place during the activity.</p> <p>This criteria is automatically selected when the activity is published as a live course. There is no need to upload documentation or to provide a justification statement.</p>
<b>GUIDANCE</b>	<b>Any in-person activity with other colleagues, participants, instructors, etc. would meet 9b.</b>
<b>EXAMPLES</b>	<p>Question and Answer period</p> <p>Small group discussion time: undirected and without topic assigned</p> <p>Break periods; discussions during <b>on-site</b> meal periods</p> <p>Morning/evening “catch up” time</p>

9c. Activity includes opportunities for participation through structured interactive opportunities	<b>REQUIRED AND/OR VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	Upload: Agenda or Conference syllabus with the specific activity noted
<b>GUIDANCE</b>	The vendor IS NOT required to verify the individual’s level of participation in the opportunity, only that the opportunity was an integrated, structured part of the activity. Does not include question/answer time.
<b>EXAMPLES</b>	Lab time, Discussion groups Small group discussion time: directed and with topic assigned Working meals with guided discussion topics/assignments Small group projects Moderated panel: 10-15 minutes minimum with greater than 2 panel members

D) RELATIONSHIP TO OTHER STANDARDS  
 STD 14: Review and Evaluation



**STANDARD 10: EVIDENCE BASED PRACTICE**

A) STANDARD

10. The continuing competence activity incorporates, reflects and promotes the use of evidence-based practice or incorporates current or proposed regulation of practice.

Required: Yes

B) CRITERIA-REQUIRED

10a. The activity is developed from the base of available evidence or current regulations; participants are provided references when appropriate.	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Upload: 1. Conference agenda, brochure, or syllabus and 2. Session proposal requirements that state the content must be based on evidence and requirements for a reference list. OR summary of how clinician experience and/or patient values are used in the development of the overall conference</p> <p>Justification Statement: If the activity is not based on research or regulatory document, the vendor must provide clarification of how clinician experience and/or patient values are used in the development of the activity and thus are part of Evidenced-based practice</p>
<b>GUIDANCE</b>	<p>Evidence-based practice (EBP) is broad, comprising three elements: research, clinician experience, and patient values. Clinicians rely on all three elements to direct choices, practice, behavior, or actions. Acknowledging the role of all three elements is important, particularly in situations where limited research evidence is available or patient values alter the available avenues of treatment.</p> <p><b>Non-clinical topics:</b> such as legal, educational, management or billing issues, the types of evidence used may be completely different and include regulatory documents, accepted professional guidelines, policy documents, or best practices in management.</p>
<b>EXAMPLES</b>	<p>Proposal Submission Requirements: Sessions must identify minimum of 10 peer-reviewed sources from the last 10 years to support content.</p>

C) CRITERIA - VALUE ADDED

<p>10b. Participants are presented with case studies and the provider includes a discussion of this type of evidence and its applicability</p>	<p><b>VALUE ADDED</b></p>
<p><b>REQUIRED DOCUMENTATION</b></p>	<p>Upload: 1. Conference agenda, brochure, or syllabus with the specific time or activity for case studies noted and 2. the case study that will be used by presenter</p> <p>Case study must include the following elements:</p> <ol style="list-style-type: none"> <li>1. discussion of outcomes</li> <li>2. strengths/weaknesses of the approach used in the case</li> <li>3. discussion of strength and applicability of case study evidence based on Sackett's hierarchy of evidence</li> </ol>
<p><b>GUIDANCE</b></p>	<p>Case studies presented to participants may be clinical or non-clinical in nature.</p>
<p><b>EXAMPLES</b></p>	<p>The case involves a patient with whom the presenter worked. The presenter discusses various approaches used during treatment, the rationale and evidence for each approach, and which ones were successful or unsuccessful. Discusses that case studies are low in Sackett's hierarchy and not as strong to base decision on as other research.</p> <p>Case studies presented may be clinical or non-clinical in nature. Examples case studies include; documenting the process for changing regulations, or how peer chart reviews improved documentation, etc.</p> <p>Presenter shows videos of various PT/PTA supervision scenarios. These scenarios are discussed for appropriateness, alignment with the state law, delegation of activity. Participants discuss these scenarios in small group settings with a facilitator.</p>

10d. Activity requires participants to review current scientific evidence published in peer-reviewed resources (applicable to the activity) or to review current regulatory documents	<b>VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: The vendor must demonstrate that the participants are required to perform the tasks and there must be time within the activity itself to discuss the review of current scientific literature or regulatory documents.</p> <p>Upload: Agenda, brochure, or syllabus with specific time for these activities noted. Any preparatory assignment list and requirements must be uploaded.</p>
<b>GUIDANCE</b>	<p>In 10d, the focus is on the highest levels of evidence; those requiring peer-review. This criterion may be met either during the activity itself or in preparatory work that is required for the activity. The activity sponsor may provide pre-activity reading materials or assignments in order to meet the requirements. The examination or review of documents may be done during the activity.</p> <p>Sources published by a university press will be considered peer-reviewed.</p>
<b>EXAMPLES</b>	<p>Given a regulatory document, participants are required to perform a literature search to either support or debate the current regulation or policy.</p> <p>Participants are required to read five assigned research studies prior to arriving for a continuing education Conference on manipulation.</p> <p>Given a list of reference material, students are required to determine which sources of information are peer-reviewed versus which are not.</p>

10e. Activity requires participants to critically analyze different types of evidence, questioning the accuracy and relevance of each type, and the completeness of the body of evidence.	<b>VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: The vendor must demonstrate that the participants are required to perform the tasks and there must be time within the activity itself to discuss the review of current scientific literature or regulatory documents.</p> <p>Upload: Agenda, brochure, syllabus with specific time for these activities noted. Any preparatory assignment list and requirements must be uploaded.</p>
<b>GUIDANCE</b>	<p>In 10e, different types of evidence, encompassing all of the levels of EBP described in 3a, may be utilized and discussed. It is expected that there will be an element of discussion as to the strength/weakness of the various forms of evidence utilized.</p> <p>This criterion may be met either during the activity itself or in preparatory work that is required for the activity. The vendor may provide pre-activity reading materials or assignments in order to meet the requirements. If performed, the examination or review of documents may be done during the activity.</p>
<b>EXAMPLES</b>	<p>Participants are required to read five assigned research studies prior to arriving for a continuing education conference on manipulation and determine where each fits on the hierarchy of evidence.</p> <p>Participants will analyze the practice act from their state and compare it to the Model Practice Act, identifying similarities/differences, creating a crosswalk and a plan for improvement.</p> <p>During the activity, participants will be trained to perform effective online searches for current best evidence. Search results will be discussed and analyzed for strength of evidence and which elements are present/missing in the materials found.</p>

D) RELATIONSHIP TO OTHER STANDARDS

**STANDARD 11: BEHAVIORAL OBJECTIVES**

A) STANDARD

11. The continuing competence activity includes behavioral objectives which reflect the full extent of the activity content

B) CRITERIA- REQUIRED

11a. Objectives sufficiently reflect the focus of the activity and the critical elements of the content	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Upload:</p> <ol style="list-style-type: none"> <li>1. Documentation stating the requirement for all conference sessions to have objectives</li> <li>2. Brochure, syllabus, or screenshot of the advertised overall conference objectives (not each session’s objectives)</li> </ol> <p>Complete: Vendor Objectives Submission Form on the Standard 11 submission screen</p>
<b>GUIDANCE</b>	<p>Conferences: in order to meet the standard/criterion, a conference must require objectives from each individual session as well as have stated objectives for the overall conference as a whole. However, these objectives for the individual sessions will not be evaluated. The overall objectives for the conference will be further evaluated in 11b.</p>
<b>EXAMPLES</b>	<p>Session proposals must include behavioral objectives.</p>

11b. Objectives are behavioral and at an appropriate level for the target participant	<b>REQUIRED</b>
<b>REQUIRED DOCUMENTATION</b>	<p>Upload:</p> <ol style="list-style-type: none"> <li>1. Documentation stating the requirement for all conference sessions to have objectives</li> <li>2. Brochure, syllabus, or screenshot of the advertised overall conference objectives (not each session's objectives)</li> </ol> <p>Complete: Vendor Objectives Submission Form on the Standard 11 submission screen adding each objective individually.</p>
<b>GUIDANCE</b>	<p><b><u>BEHAVIORAL</u></b>  <b><i>50% of objectives must meet all elements below:</i></b></p> <ol style="list-style-type: none"> <li>1. Audience: The objective may be written in terms of what the conference is attempting to accomplish. The objective of a conference is typically also its stated purpose.</li> <li>2. Conditions and specifics: The objective includes the conditions or circumstances under which the participant would be expected to demonstrate the behavior. Specifics, conditions, requirements and constraints are identified in order to make the objective make sense.</li> <li>3. Realistic: The objective listed is realistic for the level of the target audience.</li> <li>4. Time Frame: The objective states when behavior will be achieved  Examples include: By the end of Conference, Following presentation</li> </ol> <p><b><u>APPROPRIATE LEVEL</u></b>  When the information in the activity would reasonably allow a participant to accomplish the objective, and is related to the field of physical therapy, the objective should be deemed reasonable for the audience. <b>You do not need to match up the level of the objectives with the target level of the audience. The Conference does not need separate objectives for each attendee type.</b> For example, PTs may attend Conferences given by other professionals that discuss non-PT techniques such as surgery. Although the PT will not perform surgery it would still be appropriate for the objectives in this example to include things like: identify signs of procedure failure, identify contraindications to a procedure, or list the appropriate discharge drugs post-op.</p>
<b>EXAMPLES</b>	<p>Examples of acceptable behavioral objectives for conference:</p> <ol style="list-style-type: none"> <li>1. The conference will explore the role of the patient's values and perspectives, development of clinical expertise and skills, and the role of relevant research.</li> <li>2. The conference will represent the 3 Pillars of EBP in dynamic and informative, didactic and hands-on sessions, designed to enhance your clinical skills.</li> <li>3. The conference will provide an extensive Exhibit Hall to feature more than 400 companies showcasing the latest and greatest in products and services available to physical therapy professionals.</li> </ol>

**STANDARD 12: ACTIVITY DESIGN**

A) STANDARD

12. The activity is designed to support the achievement of the objectives.

-The provider is responsible for documenting how the activity enables the participant to achieve the stated objectives

B) CRITERIA- REQUIRED

N/A

C) CRITERIA - VALUE ADDED

12a. The documentation clearly describes how the activity is designed to support the achievement of the objectives.	VALUE ADDED
<b>REQUIRED DOCUMENTATION</b>	<p>Justification Statement: The vendor must sufficiently:</p> <ol style="list-style-type: none"> <li>1. Identify and document the availability of the resources (personnel, facilities, equipment, etc) required to achieve the objectives.</li> <li>2. Discuss appropriateness of the mode of delivery for the activity Reviewers evaluate if the information shared can appropriately be delivered in person or on-line</li> <li>3. Discuss appropriateness of selected teaching methods lab versus lecture, use of small groups, why pre-Conference prep work</li> <li>4. Discuss time as an element of the design If the objectives are extremely expansive or advanced, you will need a longer period of time to meet those objectives Why is the amount of time appropriate to allow the instructor to meet the objectives?</li> </ol>
<b>GUIDANCE</b>	<p>Activity design refers to the ways an activity is structured to make for a successful teaching/learning experience thus meeting the learning objectives.</p> <p>Conference expects 12,000 participants. Venue can accommodate that number with ample meeting space. Number of sessions is appropriate to meet the needs of that many people.</p> <p>The instructional methods (for “teaching” activities) must be commensurate with material promoted, presented, or assessed; becoming proficient with computerized documentation requires that the technology is available in enough supply for participants to get adequate hands-on experience.</p>
<b>EXAMPLES</b>	<p>A conference makes handouts of presentations available on-line, the schedule of offerings is posted in advance, and the session length is reasonable for the information to be delivered.</p>

D) RELATIONSHIP TO OTHER STANDARDS

Standard 11

**STANDARD 14: REVIEW AND EVALUATION**

A) STANDARD

14. Mechanisms exist for review and evaluation of the quality and the effectiveness of the continuing competence activity. Subsequent offerings incorporate modifications based on information gained from the review and evaluation.

B) CRITERIA- REQUIRED

N/A

C) CRITERIA - VALUE ADDED

14a. Recommendations for improvements are solicited from participants.		<b>VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	Upload: Conference evaluation form	
<b>GUIDANCE</b>	The traditional post-activity evaluation that is filled out by the participant either anonymously or with name.	
<b>EXAMPLES</b>	Participant evaluations completed at the conclusion of the activity. Participants are individually contacted by phone or e-mail post activity and asked for feedback.	

14b. The developer/provider has documented methods for analyzing data and incorporating results into future versions of the activity		<b>VALUE ADDED</b>
<b>REQUIRED DOCUMENTATION</b>	Upload: The vendor <b>MUST</b> include the analysis tool and a minimum of one example of a change that has been made. The vendor must provide full descriptions and documentation of the changes such as a change to policy language, change to venue(s), choice of instructors, etc.	
<b>GUIDANCE</b>	The vendor attempts to quantify the quality and effectiveness of the activity beyond the participant evaluation data that is typically collected. Evaluative data are used to measure overall activity effectiveness, design, content, objectives, etc. to support changes to future offerings.	
<b>EXAMPLES</b>	Conferences: After negative ratings for two consecutive years regarding the same venue and the distance that needed to be covered by participants between conference sessions, conference sponsors issued pedometers randomly to 10% of the registrants. At the end of the conference, the pedometers were collected with a small survey form asking about the number of sessions the participant attended. The data from the pedometers and survey forms were analyzed and demonstrated attendees were walking a mode of 3 miles per day to attend 4 sessions; the conference venue was changed for the next year.	

D) RELATIONSHIP TO OTHER STANDARDS



Typical Activity Standards & Criteria Guide	Conference
<b>STANDARD 1: ADMINISTRATION</b>	
The provider identifies and provides a supportive learning environment, the physical, material, and technological resources necessary to support the activity.	
Documentation is maintained of the processes used to develop, administer, deliver, conduct and assess the activity and participants.	
The provider maintains cumulative records with appropriate security for a period of five years.	
<b>STANDARD 2: APPROPRIATE LANGUAGE</b>	
The provider certifies the use of current terminology within the activity that does not show bias or cultural insensitivity.	
<b>STANDARD 3: NON-DISCRIMINATORY</b>	
The provider certifies that the activity is available to all appropriate participants without unlawful discrimination.	
<b>STANDARD 4: COPYRIGHT &amp; DISCLOSURE</b>	
The provider must certify that appropriate permissions of copyright materials have been obtained, all copyright materials have been identified, and disclosures have been made.	
<b>STANDARD 5: CONTENT</b>	
Content of the activity must relate to the scope of practice of physical therapy as defined by the FSBPT Standards of Competence, APTA Guide to practice....	
Content within the continuing competence activity is relevant to the targeted audience(s).	
<b>STANDARD 6: CONTENT ANALYSIS</b>	
Based on the level of coverage, the emphasis given to each of the categories of learning demand and the total time involved in the activity.	
<b>STANDARD 7: INSTRUCTORS &amp; DEVELOPERS</b>	
The developers and deliverers of the activity have documented experience, education and training to allow attendees to meet the activity objectives.	
<b>STANDARD 8: INFORMATION &amp; MATERIALS</b>	
The provider supplies sufficient information to allow prospective participants to judge the value and appropriateness of the activity.	
<b>STANDARD 9: ENGAGEMENT</b>	
<b>Need one of the following as required, all others value added</b>	
a. Activity includes structured opportunities for self-reflection and identification of growth opportunities.	
b. Activity offers informal opportunities for interaction and/or feedback from other professionals.	<b>GIVEN</b>
c. Activity includes opportunities for participation through structured interactive opportunities.	
d. Activity provides opportunities to contribute to the profession and its body of knowledge.	

<b>STANDARD 10: EVIDENCE-BASED PRACTICE</b>		
a.	The activity is developed from the base of available evidence or current regulations; participants are provided references when appropriate.	
b.	Participants are presented with case studies and the provider includes a discussion of this type of evidence and its applicability.	
c.	Participants present a case study relevant to the content of the activity and include a critical evaluation of whether the case study demonstrates a defensible approach, has broader applicability or would benefit from additional research.	
d.	Activity requires participants to review current scientific evidence published in peer-reviewed resources (applicable to the activity) or to review current regulatory documents	
e.	Activity requires participants to critically analyze different types of evidence, questioning the accuracy and relevance of each type, and the completeness of the body of evidence.	
f.	The provider has documentation to support that there is a linkage between participation in the activity and the increased use of evidence-based practice by participants.	
<b>STANDARD 11: OBJECTIVES</b>		
a.	Objectives sufficiently reflect the focus of the activity and the critical elements of the content.	**
b.	Objectives are behavioral and at an appropriate level for the target participant.	**
c.	Greater than ½ of the total number of objectives meet both required criteria	
d.	The objectives focus on higher levels of learning.	
<b>STANDARD 12: ACTIVITY DESIGN</b>		
	The documentation clearly describes how the activity is designed to support the achievement of the objectives.	
<b>STANDARD 13: ASSESSMENT N/A for conferences</b>		
<b>STANDARD 14: REVIEW &amp; EVALUATION</b>		
a.	Recommendations for improvements are solicited from participants.	
b.	The developer/provider has documented methods for analyzing data and incorporating results into future versions of the activity.	
c.	The developer/deliverer collects data regarding the quality and effectiveness of the activity outside of collecting participant feedback.	

## Vendor Objectives Submission Form: Behavioral Objectives Conferences

1. Click Add New Objective and enter the entire objective into the field. Follow the tool-tips (mouse-over the question mark) to ensure the objectives contain the required elements.
2. Complete all components of the bottom section, uploading the required documents as identified in the Standard 11 section of this document.

### Your Objectives

- New Objective ✕

[Add New Objective](#)

### Objective

Objective:  
New Objective

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### For Your Information, Required Elements of a Behavioral Objective

What is the timeframe of these objectives? [?](#)  
Who will perform the objective? [?](#)  
What are the specifics and conditions? [?](#)

Examples of Conference Objectives: [?](#)  
During the conference the participant will explore the role of patient values and perspectives as they relate to the physical therapy practice.  
  
During the conference the participant will foster development of clinical expertise and skills as related to neuromuscular dysfunction.  
  
During the conference the participant will explore the role of relevant research in progressing physical therapy in the 21st century and beyond.

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**Required:** Objectives sufficiently reflect the focus of the activity and the critical elements of the content.

I Agree

The conference developers require ALL sessions to have objectives:

Yes  No

[Use Existing Files](#) [?](#)  
OR  
[Upload file \(max 10MB\)](#)

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**Required:** Objectives are behavioral and at an appropriate level for the target audience.

I Agree

[Use Existing Files](#) [?](#)  
OR  
[Upload file \(max 10MB\)](#)