

POLICIES AND PROCEDURES FOR CONTINUING EDUCATION APPROVAL

**Ohio Physical Therapy Association
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Policies and Procedures for Continuing Education Approval

Ohio Physical Therapy Association

PURPOSE:

The purpose of this document is to provide and communicate a uniform process for evaluating continuing education courses, programs, and activities suitable for license renewal of individuals licensed to practice physical therapy in the State of Ohio.

The Ohio Physical Therapy Association (OPTA), through the Continuing Education (CE) Committee, is an entity authorized by the Physical Therapy Section of the Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board (hereafter referred to as the PT Section of the OT, PT, AT Board) to review and approve continuing education courses, programs and activities that contribute to the growth of a participant's professional competence in the practice of physical therapy. (Refer to Section 4755.53 (C) of the Ohio Revised Code.

Approved courses, programs, and activities must meet the standards delineated in Sections 4755.52 and 4755.53 of the Ohio Revised Code and described in this document.

SECTION A

STANDARDS FOR REVIEW AND APPROVAL OF CONTINUING EDUCATION COURSES, PROGRAMS, AND ACTIVITIES FOR PHYSICAL THERAPISTS AND PHYSICAL THERAPIST ASSISTANTS IN THE STATE OF OHIO

CRITERIA FOR CONTINUING EDUCATION

Note: The criteria in this section are derived from section 4755.52 (B) of the Ohio Revised Code. Regardless of how or where a CE course, program or activity is offered or completed, the criteria delineated in this section will be applied during the review process.

1.0 Course Content

- 1.1 Must contain content directly related to the practice of physical therapy, professional responsibility, or ethical obligations.
- 1.2 Must contain significant intellectual or practical content intended to improve a participant's professional competence in physical therapy.
- 1.3 Must contain current, high quality information, preferably evidence-based, designed to increase or enhance knowledge, skills, or attitudes consistent with current standards of practice in physical therapy.
 - 1.3.1 Programs or activities designed to meet initial or ongoing conditions of employment and programs that deal with the internal operating procedures of an organization or work-site specific procedures do not qualify for continuing education credit for license renewal.
 - 1.3.2 Broad-based programs, where the physical therapist or physical therapist assistant is not the target audience, may be approved for only partial credit or may not be approved.

2.0 Format

The continuing education activity must reflect an organized program of learning (in-person instruction or other methods of instruction) supported by learning objectives.

- 2.1 Types of programming eligible for approval:
 - 2.1.1 An on-site course, program, seminar workshop, structured debate, journal club, or live webinar specifically designed for continuing education.
 - 2.1.2 Distance education (home study; video, audio or web-based instruction; recorded/streaming webinar; etc.) developed by an individual or group qualified by practical or academic experience.

- 2.1.3 A course offered as a series. A series is defined as congruent material presented in short sessions or modules over a period of time. A course offered as a series must meet the following criteria: 1) overall course description must cover one clearly defined topic; 2) learning objectives must relate to all sessions/modules; 3) the course bibliography must support the scope of the content in the series; 4) participant must complete all sessions/modules to receive continuing education units (CEUs). A monthly journal club or a course that is offered over successive weeks/weekends are appropriate examples of a course offered as a series if they meet all of the above criteria. *A sequence of sessions or modules covering an array of topics is not considered a course offered as a series.*
- 2.1.4 A professional association's conference that contains multiple, concurrent educational sessions.

- 2.1.4.1 For sponsors of a multi-day conference where attendees have flexibility in the number of days and/or sessions to attend, **AND** where the sponsor has the ability to provide the attendee with a "transcript" showing the titles of the actual sessions/days attended, the sponsor can submit one conference application.

For each session of the conference, the following information must be provided:

- Learning Objectives
- Length of the session
- References (a minimum of five per session published within the last seven years based on the course date)
- Speaker bio
- List of specific topics to be discussed during session
- Session description
- Method of assessing attendee learning

For the overall conference, the following information must be provided

- Conference format (i.e. on-site, virtual real time webinar or recorded, etc.)
- Sample transcript
- Sample certificate
- Overall agenda (including overall maximum # CEUs possible)
- Method for verification of attendance (description of how session attendance is tracked)
- Sample evaluation form

Reviewers will have the option to approve a multi-day conference with an "up to xxx CEUs" approval. It is the responsibility of the attendee to only claim the actual number of CEUs earned as shown on the transcript.

- 2.1.4.2 For attendees of a multi-day conference submitting an individual application – **For each conference session attended**, the following information must be provided:
- Session description
 - Learning objectives
 - Speaker bio
 - References (a minimum of five per session published within the last seven years based on the course date)

For the overall conference, the following information must be provided

- Overall conference agenda
- Method of assessing attendee learning, including any post-tests given
- Certificate of participation
- Evaluation form

- 2.1.5 An academic course taken at an accredited college or university.

2.2 Learning objectives:

- 2.2.1 Course objectives must be clearly stated and relevant to the practice of physical therapy.
- 2.2.2 The course content must be consistent with the stated learning objectives/outcomes.
- 2.2.3 The objectives must include the expected learning outcomes for a participant (identifying what the participant will be able to do at the completion of the course or activity) and must relate to the practice of physical therapy, professional responsibility, or ethical obligations.

3.0 Faculty Qualifications

- 3.1 The continuing education program must be prepared and/or conducted by an individual or a group qualified to teach the course content to the specified target audience (as determined by the OPTA or the PT Section of the OT, PT, AT Board).
- 3.2 The faculty/presenter(s) must provide evidence of qualifications, such as educational background, practical experience, or academic credentials.

4.0 Instructional Hours

- 4.1 CEUs must be based upon clock-hours of instruction. One clock-hour of instruction equals one CEU. A portion of an instructional hour and associated CEUs are subdivided in no less than 15-minute increments (rounded to the nearest 0.25 CEUs.)
- 4.2 A course or program must contain a time schedule that accurately identifies the periods of instruction. Registration, introduction/welcome remarks, breaks, meals, pre-tests and time set aside for evaluation of the course will not be calculated in the clock-hours of instruction.
 - 4.2.1 The course schedule must allow suitable time for participants to absorb the material presented.
 - 4.2.2 Time set aside for Q&A and post-tests will be calculated in the clock hours of instruction.
 - 4.2.3 For any course where prerequisite work (including the reading of journal articles) is required before taking a course or participating in a journal club, CEUs may be awarded for time spent on the prerequisite work if documentation is provided showing how the sponsor determined the amount of time to be spent on the prerequisite work and the participant signs an attestation statement confirming prerequisite work was completed prior to the start of the course. Additionally, any prerequisite required reading must be within the current limits of the bibliographical requirements of the course.
- 4.3 Sponsors (authors) of distance education courses, which may be completed at the learner's own pace, must identify how the estimated number of hours to complete the course and the number of CEUs offered for the course were determined. See additional details in the "Policy on Distance Education" in a later section of this document.
- 4.4 See additional information on calculation of CEUs for other types of learning activities in Section B and in policies dealing with CEUs for teaching or authoring a publication in Sections H and I of this document.

5.0 Teaching Methods and Course Materials

- 5.1 Teaching methods must be appropriate for the content taught. (Examples include, but are not limited to, lecture, discussion, demonstration, problem-solving, case studies, laboratory practice.)
- 5.2 Course materials must include high-quality material, supported by a bibliography of at least five current references (e.g., articles from professional journals, textbooks, and websites) published within the past seven years. Five of these references must be from peer-reviewed or editor-reviewed sources. Digital publications (e-publications) are acceptable if they can be obtained digitally as full-text publications.
 - 5.2.1 Due to inconsistencies of artificial intelligence performance, if references provided are not found to be valid, the reference will not be accepted towards the bibliographic requirement of five references published within the last seven years based on course date.
- 5.3 Course materials must describe instructional aids and resource materials to be utilized.
- 5.4 When a textbook is used as the primary source of content for a course, as in a "read for CEU" format, it is preferred that the most recent version published should be used to maintain compliance with the reference requirement stated in Section B 2.4. Textbooks or chapters that do not have chapter references in compliance with the reference requirement should not be used for CEUs.

- 5.5 When a textbook is used as the primary source of content for a course, as in a “read for CEU” format, the actual chapter references from the textbook should be submitted to show compliance with the reference requirement stated in Section B. 2.4.

6.0 Setting/Environment

- 6.1 The physical environment for the course, program or activity must be suitable to the subject matter of the course and conducive to learning.

SECTION B

APPLICATION FOR CONTINUING EDUCATION UNITS

Purpose: To describe the application process and identify the documents that must be included in an application.

1.0 Obtaining and Submitting an Application

- 1.1 An application for review of a course or activity for CEUs may be submitted by either a COURSE SPONSOR (PROVIDER) or an INDIVIDUAL LICENSEE. The link to the online application portal and instruction sheets can be obtained from the OPTA web site (www.OhioPT.org/page/ContinuingEducation).
- 1.2 All applications and supporting information about a course must be submitted in English.
- 1.3 Sponsors can submit course applications at any time but are encouraged to submit applications 75-90 days prior to the course date to allow time to go through the review process and receive a determination before the course date. Applications can also be submitted after the course date and will go through the normal review process – if approved, the approval date will be retroactive to the course date submitted on the application.
- 1.4 Individual licensees are encouraged to submit applications for review within 60 days after completion of a continuing education course or activity.
- 1.5 Individual licensees bear the responsibility for applying to the OPTA for CE approval of a course that he or she has attended but that has not been reviewed by the OPTA and assigned an Ohio approval number.
- 1.6 Courses, programs, or activities with an approval number from another state or from any national organization, but without an Ohio approval number, still must be submitted to the OPTA for review, approval and assignment of an Ohio approval number.
- 1.7 Previous approval – even of a renewal application – does not guarantee current or future approval. Each application submitted goes through a thorough review and is approved or denied on its own merits.

2.0 The Application

To be considered complete, the following information must be submitted in the application:

- 2.1 Applications are to be submitted online to the portal with all requested information supplied. The application portal can be found here - <https://portalopta.cyzap.net/dzapps/dbzap.bin/apps/assess/webmembers/login?webid=OPTA>.
- 2.2 Learning objectives for the course.
- 2.3 In a brief description or an abbreviated CV (not to exceed two pages) the qualifications of each presenter/instructor to teach the course content.
- 2.4 A bibliography of at least five peer-reviewed references (e.g. journal articles, textbooks, etc.), published within the past seven years that supports the content of the course.
- 2.4.1 References submitted with either a sponsor or individual application must be current based on the course date listed on the application, not the date of application submission.
- 2.4.2 For websites, entire URL, publication date, and date of access must be supplied in order to verify that the site is still current. Consumer websites are not acceptable.
- 2.4.3 Due to inconsistencies of artificial intelligence performance, if references provided are not found to be valid, the reference will not be accepted towards the bibliographic requirement of five references published within the last seven years based on course date.

- 2.5 A detailed time schedule that outlines course content and identifies registration time, breaks, meals, and time set aside for Q&A, post-tests, and evaluation of the course.
- 2.6 The mechanism for providing verification of a participant's attendance and completion of the CE course or educational activity. A sign-in sheet or electronic scanning are acceptable for on-site courses. For distance learning courses, a separate and distinct method of attendance tracking is required. Examples include: an attestation of course completion, embedded questioning within distance learning materials, an inability to fast forward through online content, inability to take the post-test prior to reviewing the materials, etc. For webinar courses, tracking may include tracking log in/log out times and duration of attendance via the webinar platform, virtually signing in and out in the chat while keeping videos on, participation in poll questions, etc. (See additional details in "Policy on Verification of Attendance" in Section E of this document.)
- 2.7 A method of evaluation of the course speaker and whether the objectives were met.
- 2.8 A certificate of completion.
 - 2.8.1 The certificate should contain a course title, date of completion, attendee's name, number of CEUs/approval number, and signature of the sponsor. If the certificate submitted is a sample certificate, it can be blank but clearly marked sample and formatted to show that the information listed above will be included on the final certificate.
- 2.9 A method for evaluation of the student's learning (i.e. live Q&A, post-tests, lab demonstration, or case studies, etc.)
- 2.10 A summary statement describing how the content of the course or program is directly related to the practice of physical therapy and how the course content improves a participant's knowledge, skills, or attitudes consistent with current standards of practice in physical therapy. May include identification of target audience.
- 2.11 A course brochure, if available.

3.0 Applications submitted as a Renew Application

The Renew Application option can only be utilized for sponsor applications that remain exactly the same as the original application. Applications containing outdated information or that require "follow up" will be deemed ineligible for this option and will be returned to the sponsor to be re-submitted as a new application and placed in the review queue when payment is received.

- 3.1 Only sponsor applications approved in the previous 15 months will be eligible for the Renew option.
- 3.2 This option can only be used for applications for which there are **no changes** to the original application (bibliography is current as defined in Section B, 2.4; speaker(s), content, and agenda are still the same, etc.). All information must be current.
 - 3.2.1 References submitted with either a sponsor or individual application must be current based on the course date listed on the application, not the date of application submission.
 - 3.2.2 Due to inconsistencies of artificial intelligence performance, if references provided are not found to be valid, the reference will not be accepted towards the bibliographic requirement of five references published within the last seven years based on course date.
- 3.3 There is a limit of one renewal per application. If a sponsor wants to renew a course for a second time, the sponsor will need to submit the course as a new application to allow for a complete review of all course materials.
- 3.4 Any application submitted for renewal for a second time, or found to have outdated information, will be **cancelled** by the reviewers.
 - 3.4.1 When an application is cancelled, a credit equal to the amount of the application fee will be placed on the sponsor's account.
 - 3.4.2 The sponsor will receive an email stating that the application has been cancelled and withdrawn and needs to be re-submitted as a new application.
 - 3.4.3 The sponsor will need to submit a new application, which will be placed in the review queue based on the date payment is received. Regular review procedures will apply.

4.0 Application Fees

- 4.1 Reasonable and customary fees for reviewing and processing applications for continuing education credit are established and collected by the OPTA.
- 4.2 Fees are to be submitted with each application based on the number of CEUs requested.
- 4.3 Application fees are NONREFUNDABLE.
- 4.4 The review process begins when payment is received by the OPTA.

5.0 Calculation of CEUs in a CE Program

- 5.1 One CEU is equivalent to one clock hour of instruction in a continuing education program. A portion of an instructional hour and associated CEUs are subdivided in no less than 15-minute increments (rounded to the nearest 0.25 CEUs.)
 - 5.1.1 CEUs are not awarded for time set aside for registration, introductions/welcome remarks, breaks, meals, pre-tests, or evaluation of the course.
- 5.2 A sponsor of a distance education course must describe how the number of CEUs was determined for the course. (see guidelines in the "Policy on Distance Education" in Section J of this document.)

6.0 Calculation of CEUs for Academic Courses (taken at an accredited college or university)

- 6.1 Each hour of credit earned in a semester-based course shall constitute no more than 15 hours of continuing education credit.
- 6.2 Each hour of credit earned in a quarter-based course shall constitute no more than 10 hours of continuing education credit.

7.0 Calculation of CEUs for teaching a course or authoring a publication directly related to the practice of physical therapy

- 7.1 A licensee may apply for continuing education credit for these activities. (For details, see Sections H and I, "Policy on Teaching Activities" and "Policy on Publication Activities" in this document.)

SECTION C

OPTA CONTINUING EDUCATION COMMITTEE

Purpose: To describe the composition and functions of the Continuing Education (CE) Committee of the OPTA. This section also identifies the responsibilities and duties of the CE Committee.

1.0 Membership

The committee shall consist of no less than five members. The members of the committee must be active, life, affiliate, or life affiliate members of the OPTA. Members shall serve a three-year term. Appointments to the CE Committee shall be made by the Board of Directors of the OPTA. Members shall have consented to serve, with appointments occurring no later than 60 days prior to the term of office. The Board of Directors of the OPTA shall choose members based on a diversity of clinical experience and practice settings. Committee members are eligible for reappointment and may serve up to three consecutive terms, i.e. a total of nine years. Additionally, one to two PT or PTA student members can serve in a non-voting capacity on this committee. Student members can participate in audits, but must be mentored by a member with full voting rights. Student members who subsequently graduate and become licensed in the State of Ohio may be requested to serve in a full member capacity.

- 1.1 The CE Reviewer(s) and Executive Director of the OPTA shall serve as *ad hoc* members of the committee. The President of the OPTA shall serve as an *ex officio* member of the committee. All are non-voting members.
 - 1.1.1 A CE Reviewer is a contract employee of the OPTA, hired to evaluate CE applications. This individual must be a physical therapist, licensed in the State of Ohio, and knowledgeable about physical therapy education.

- 1.2 The chairperson of the committee must be an active member of the OPTA and shall serve as chairperson for a three-year term. The chairperson must serve on the committee for at least one year prior to the appointment as chairperson and is eligible for reappointment.
 - 1.2.1 The chairperson can serve as chair for a maximum of two terms (six years).
- 1.3 A member of the PT Section of the OT, PT, AT Board and a designated Director of the OPTA Board of Directors shall serve as Board Liaison to the committee.

2.0 Duties and Responsibilities

The committee shall:

- 2.1 Oversee the continuing education review process of the OPTA consistent with the policies and procedures outlined in this document.
- 2.2 Apply the “Standards for Approval of Continuing Education Courses, Programs, and Activities for Physical Therapists and Physical Therapist Assistants in the State of Ohio as described in the ORC 4755.52 (B) 1-6 and outlined in the first section of this document.
- 2.3 Oversee the quality of the OPTA CE review process by performing semi-annual audits of five percent (5%) of the courses reviewed over a six-month period. The responsibility for these audits is to be shared equally by all committee members.
- 2.4 With ongoing input from the OPTA CE Reviewer(s), Executive Director, and OPTA office staff, review and make recommendations to the OPTA Board of Directors for revision and updating of this document.
- 2.5 With input from the Executive Director and OPTA Finance Committee, make recommendations to the OPTA Board of Directors to set reasonable and customary fees for the review and processing of CE applications.
- 2.6 Review and vote on appeals of denials of CEUs for continuing education activities. (See “Policy on Denial and Appeal of CEUs” in Section G of this document.)
- 2.7 Provide input on the development of continuing education courses sponsored by the OPTA as needed.
- 2.8 Through collaboration of the OPTA Executive Director and the chairperson of the committee, interact with the PT Section of the Ohio OT, PT, AT Board by attending meetings at least twice a year or as needed.
- 2.9 Review the Policies and Procedures Manual at least once per each chairperson’s cycle or as needed.

3.0 Budget

The committee chairperson shall develop a yearly budget identifying projected expenses that will be reviewed by the Finance Committee and approved by the Executive Board of the OPTA.

4.0 Meetings

- 4.1 The committee shall meet at least two times a year to review and discuss the continuing education process and policies with the OPTA CE Reviewers, Executive Director and office staff.
- 4.2 The need for additional meetings will be determined by members of the committee; these meetings will be conducted by telephone conference or other electronic communication.

5.0 Reports

- 5.1 The chairperson of the committee shall prepare written reports for each meeting of the OPTA Board of Directors.
- 5.2 An annual reports will be given to the PT Section of the Ohio OT, PT, AT Board.

SECTION D

THE CE REVIEW PROCESS

Purpose: To describe the OPTA's process for reviewing and evaluating applications for approval of continuing education credits applicable for license renewal of physical therapists and physical therapist assistants.

1.0 Assignment of an application number

- 1.1 Each application for approval of a CE activity, submitted by a course sponsor or individual licensee, will be dated when received and assigned a temporary application number (for tracking purposes).

2.0 Evaluation of the course by an OPTA CE Reviewer

- 2.1 After the application has been moved to the review queue, the application will be reviewed in the order received.
 - 2.1.1 Reviewers must begin the review process of an application within 60 days of the application being moved to the review queue.
 - 2.1.2 As noted in Section C of this document, which describes the CE Committee, a CE Reviewer is a contract employee of the OPTA who is a physical therapist, licensed in the State of Ohio, and knowledgeable about CE for PTs and PTAs.
- 2.2 When evaluating a course or activity for CEUs, the OPTA CE Reviewer may request additional information/clarification from the applicant in order to meet the "Standards for Approval of Continuing Education Courses, Programs, and Activities for Physical Therapists and Physical Therapist Assistants in the State of Ohio" as described in the Ohio Revised Code and all relevant policies and procedures in this document.
 - 2.2.1 An application may remain "on hold," for up to 30 days during which time the OPTA CE Reviewer will contact the applicant at least twice to secure the missing information.
 - 2.2.2 After 30 days, if the OPTA CE Reviewer has not received the missing information, the file is closed, and the applicant is sent correspondence indicating why the file was closed.
 - 2.2.3 If an application is denied due to non-response after more than 30 days after receiving two requests by the reviewer for more information per policy 2.2.1 and 2.2.2, the application is permanently closed and not eligible for the appeal process. If the applicant wants further consideration of the course, a new application must be submitted, and a new application fee paid.
 - 2.2.4 Should an applicant decide to withdraw their application at any time, the file will be considered withdrawn and closed and no further action will be required by the OPTA CE Reviewer.
- 2.3 After the CE Reviewer has approved a course and has determined the number of CEUs to be awarded or has denied approval of an application, the CE Reviewer will notify the applicant of the decision.
- 2.4 The CE Reviewer will include and verify with his or her e-signature as a CEU reviewer the following information within the online portal system: 1) the course name; 2) the application number; 3) the decision (approval and number of CEUs awarded or denial); 4) the reasons for the decision if a course is denied approval; and 5) the date of the decision.
- 2.5 If a course is denied approval of all or a portion of the CEUs requested, the CE Reviewer must identify specific reason(s) for the decision and must cite the specific section number(s) of this document and the pertinent portion(s) of the Ohio Revised Code as justification for the denial. This information is submitted to the applicant and notated on the application.

3.0 Notification of the applicant

- 3.1 For a course that has been approved, OPTA will assign a permanent approval number to the course/activity and then will send written notification of the OPTA's decision to the applicant.
 - 3.1.1 The notification will include the course approval number and the number of CEUs awarded.
 - 3.1.2 **Course approvals are valid for one year from the course date entered on the application or the first date the course is offered and are not subject to change after approval.**

- 3.1.3 It is the sponsor's responsibility to promote accurate and updated approval numbers in their marketing materials, on their website postings, and on their completion certificates.
- 3.2 If a course/activity fails to meet the criteria for approval of all or a portion of the CEUs requested, the CE Reviewer will notify the applicant of the decision, in writing, and will specify the reasons cited for the denial. (Refer to the "Policy on Denial and Appeal of CEUs" in a later section of this document.)
 - 3.2.1 If a course/activity is denied CEUs, the applicant has the right to appeal the decision and request a review of the course or activity by the voting members of OPTA CE Committee.
 - 3.2.2 If a majority of the members of the CE Committee denies the appeal (upholds the initial decision), the applicant has the right to appeal the CE Committee's decision to the PT Section of the Ohio OT, PT, AT Board for a final decision.
 - 3.2.3 Applicant must submit their appeal in writing to the PT Section of the Ohio OTPTAT Board (board@otptat.ohio.gov) within 30 days of receipt of the CE Committee's decision.
- 3.3 If a course is requested to be withdrawn by an applicant, the OPTA will update the application accordingly. No refund of fees will be given.

4.0 Disposal of applications

- 4.1 Upon request, any original course material submitted with the application, may be returned to the applicant. Online records will be kept on file or at a secured off-site facility for a reasonable period of time.

SECTION E

POLICY ON VERIFICATION OF ATTENDANCE/PARTICIPATION IN CE ACTIVITIES

Purpose: To provide a method of documented attestation of a licensee's attendance and/or participation in approved continuing education activities.

- 1.0 It is the responsibility of sponsors or presenters of CE activities to verify a participant's attendance and completion of a CE course, program or activity.**
- 2.0 Sponsors or presenters seeking approval of a CE activity must submit a plan or system in the application to verify attendance of their participants. For all courses, tracking attendance is required. A sign-in sheet or electronic scanning are acceptable for on-site courses. For distance learning courses, a separate and distinct method of attendance tracking is required. Examples include: an attestation of course completion, embedded questioning within distance learning materials, an inability to fast forward through online content, inability to take the post-test prior to reviewing the materials, tracking log-on time, etc. For webinar courses, tracking may include tracking log in/log out times and duration of attendance via the webinar platform, virtually signing in and out in the chat while keeping videos on, participation in poll questions, etc.**
- 3.0 At the conclusion of an educational activity, the participant must be provided a letter or certificate of attendance that indicates the participant's name, the name and date(s) of the course, the signature of the course sponsor or instructor, the number of CEUs earned and the Ohio approval number of the course assigned by OPTA.**
- 4.0 A licensee, submitting an individual application for approval of CEUs for an academic course, must include an official college/university transcript in order to verify enrollment in and satisfactory completion of the course. Official digital transcripts submitted through a secured site, emailed directly to the OPTA office will also be accepted.**

5.0 The requirement for satisfactory completion of a continuing education course/activity entails completion of a specific instructional sequence over a predetermined period of time as indicated by the course schedule. Completion of only a portion of the instructional sequence (hours) may not qualify the individual to receive verification of his/her participation in the CE course.

- 5.1 For a course or program, if a participant completes less than the approved instructional hours, the sponsor or presenter has the responsibility to determine if a reduced number of CEUs should be awarded and provide a letter of verification of attendance signed by the sponsor or presenter indicating the number of contact hours the participant was in attendance (the correct number of CEUs awarded).
- 5.2 For a course in a series (i.e. journal clubs), the expectation is that all sessions are attended by a participant to receive CEUs. If less than 80% of the sessions are attended by a participant, then no CEUs are to be awarded by the sponsor to the participant.
- 5.3 It is the ethical and legal responsibility of the participant to report the actual hours of attendance when they are less than those indicated on the certificate.

SECTION F

POLICY ON RELEVANCE OF CONTINUING EDUCATION ACTIVITIES TO PHYSICAL THERAPY PRACTICE FOR LICENSE RENEWAL

Purpose: To assist course sponsors and licensees in identifying those educational activities qualifying as "...an organized program of learning dealing with matters directly related to the practice of physical therapy, professional responsibility, ethical obligations, or similar subjects...that maintain and improve the quality of physical therapy services in this state." (Section 4755.52 (B) (2) of the Ohio Revised Code.)

1.0 Definitions

(Reference: Webster's New World Dictionary)

- 1.1 Related: Connected or associated, as by origin of kind.
- 1.2 Relevant: Bearing upon or relating to the matter at hand; pertinent; implies close logical relationship with an importance to the matter under consideration).

2.0 Determination of relevance of subject matter to physical therapy

- 2.1 All CE activities reported for license renewal purposes will be evaluated on a course by course basis by the OPTA to determine their relevance to the practice of physical therapy (Section 4755.52 (C) of the Ohio Revised Code).
- 2.2 Programs or activities designed to meet initial or ongoing conditions of employment and programs that deal with the internal operating procedures of an organization or work-site specific procedures do not qualify for continuing education credit for license renewal.
- 2.3 Determination of relevance to physical therapy and delineation of the scope of practice of physical therapy are based on the sections of the Ohio Revised Code dealing with physical therapy and the content included in but not limited to the most recent editions of the following APTA documents.
 - 2.3.1 The Guide to Physical Therapist Practice
 - 2.3.2 The Normative Model for Physical Therapist Education and The Normative Model for Physical Therapist Assistant Education
 - 2.3.3 Standards of Practice for Physical Therapy
 - 2.3.4 Code of Ethics
 - 2.3.5 Guide for Professional Conduct,
 - 2.3.6 Standards of Ethical Conduct for the Physical Therapist Assistant.
 - 2.3.7 Guide for Conduct of the Physical Therapist Assistant

SECTION G

POLICY ON DENIAL AND APPEAL OF CEUs

Purpose: To identify the reasons that an educational activity can be denied approval for CE credit, or the number of CEUs awarded are fewer than requested.

1.0 A CE activity can be denied approval for the following reasons:

- 1.1 An application that remains incomplete without correspondence for 30 days despite periodic reminders (e-mail or telephone contacts) from the CE Reviewer.
- 1.2 Inconsistency between learning objectives and course content.
- 1.3 Insufficient instructor qualifications to teach the course content or meet learning objectives for the target audience.
- 1.4 Inability to verify participants' attendance and completion of the CE activity.
- 1.5 Insufficient relevance to the practice of physical therapy, as stated in the "Policy on Relevance..." in Section F of this document.
- 1.6 Lack of a bibliography of at least five references published in the past seven years based on the course date supporting the content and objectives of the course.
 - 1.6.1 Due to inconsistencies of artificial intelligence performance, if references provided are not found to be valid, the reference will not be accepted towards the bibliographic requirement of five references published within the last seven years based on course date.
- 1.7 Learning objectives and content of the course are not within the scope of practice of physical therapy.
- 1.8 Duplicate application, or an individual application with a current sponsor approval or an individual application where the sponsor's course has been denied. An exception may be made for an individual application submitted when the sponsor application has been denied due to non-response to requests for more information.

2.0 Limitations on CEUs Awarded

- 2.1 No more than 12 CEUs for a physical therapist or six CEUs for a physical therapist assistant will be granted for teaching during a biennial renewal period.
- 2.2 No more than 10 CEUs per publication will be granted to an author or co-author of a published article or book relevant to the practice of physical therapy.

3.0 Written notice of a denial

- 3.1 An explanation of the reason(s) for denial of all or a portion of the CEUs requested shall be given to the individual licensee or sponsor who submitted the application. CEUs are awarded based on contact hours, so there may be courses where *a portion* of the CEUs requested are approved.

4.0 The appeal process

- 4.1 A sponsor or an individual licensee may appeal a decision at two levels. The first appeal is sent to the OPTA CE Committee.
- 4.2 Requests for a formal appeal of a CE Reviewer's decision must be submitted in writing within 60 days of receiving notice of denial of CEUs. Requests should be sent to the OPTA office to the attention of the CE Committee.
- 4.3 A copy of the denial and additional information, which supports approval, rather than denial of the CE activity must be included in the appeal.
- 4.4 After all information necessary to process the appeal has been received by the OPTA, the CE Committee has 30 days to review and respond to the person who has made the appeal.
- 4.5 An appeal will be reviewed by all voting members of the CE Committee after receipt of a copy of the application materials and additional information submitted with the appeal. The committee will determine by means of a majority vote during a conference call whether to support or reject the appeal.
- 4.6 Conference calls for appeals are scheduled on an "as needed" basis as determined by the chairperson of the committee.

- 4.7 The committee shall identify reason(s) for supporting or rejecting an appeal. The chairperson will communicate the committee's decision on an appeal and the rationale for the decision to the OPTA office in writing. The office, in turn, will send written notification of the committee's decision to the individual who submitted the appeal.
- 4.8 If a majority of the voting members of the CE Committee rejects the appeal (upholds the initial denial), the applicant has the right to appeal the CE Committee's decision to the PT Section of the Ohio OT, PT, AT Board for a final decision.
- 4.9 Applicant must submit their appeal in writing to the PT Section of the Ohio OTPTAT Board (board@otptat.ohio.gov) within 30 days of receipt of the CE Committee's decision.

SECTION H

POLICY ON PUBLICATION ACTIVITIES FOR CEUs

Purpose: To maintain consistency in the review of a publication submitted by a licensee for approval of CEUs.

- 1.0 Publications submitted to meet the continuing education requirement for physical therapists and physical therapist assistants must comply with the standards and criteria in section 4755.52 (B) of the Ohio Revised Code and the items noted in this policy.**
- 2.0 All or part of the required number of CEUs in a biennial license renewal period may be obtained through publication activities. However, no more than 10 CEUs will be granted per publication as noted in section 4755.53 (A) (5) of the Ohio Revised Code.**
- 3.0 If a publication (written or video) is relevant to physical therapy and was published or accepted for publication during the period for which credit is claimed for license renewal, this publication may be used to meet CEUs. An individual licensee (PT or PTA), who is sole author of an original article (paper) published in a refereed professional journal may be granted up to seven CEUs. An individual licensee (PT or PTA) who is co-author of an original article (paper) published in a refereed professional journal, may be granted up to five CEUs. An individual licensee (PT or PTA) who has written or contributed to a first edition of an academic textbook may be granted up to 10 CEUs. An individual licensee (PT or PTA) who has revised a chapter of an academic textbook may receive up to five CEUs depending on the justification of hours spent on revision.**
 - 3.1 A refereed journal shall be considered one in which all submissions are subject to peer review by an editorial or review board prior to publication.
 - 3.2 Abstracts of platform or poster presentations, letters to the editor, personal opinions, etc., will not be approved for CEUs.
 - 3.3 Publications will be considered according to their original, first date of publication. In the case of e-publications and print publications of the same article, the date of the publication that occurs first will be utilized.
- 4.0 Reviews that are relevant to physical therapy and published or accepted for publication in a refereed journal during the period for which credit is claimed for license renewal may be granted CEUs. An individual licensee (PT or PTA), who is sole author of a review (critique) of a scientific book may be granted up to four CEUs. An individual licensee (PT or PTA) who reviews another author's published article may be granted up to three CEUs if the review is relevant to physical therapy and if the review was published or accepted for publication in a refereed journal.**
- 5.0 An applicant for CEUs must submit proof of authorship and publication.**
- 6.0 The applicant must provide the OPTA with an estimate of the number of clock-hours spent preparing, writing and revising the publication.**

SECTION I

POLICY ON TEACHING ACTIVITIES FOR CEUs

Purpose: To describe the requirements necessary to receive continuing education credit for license renewal for teaching activities.

Definitions for Categories of Teaching (identified in Section I (6.0), (7.0), and (8.0)):

- Section I (6.0) refers to teaching a course at an institution of higher education as a core faculty member (as defined in the Commission on Accreditation of Physical Therapy Education's Evaluative Criteria for Physical Therapist or Physical Therapist Assistant Entry-Level Education) with a full-time or part-time appointment whose primary responsibilities in the curriculum involve classroom and/or laboratory teaching.
- Section I (7.0) refers to teaching a course or portion of a course at an institution of higher education as a guest instructor or lecturer or as an associated faculty member but not as a core faculty member in the curriculum.
- Section I (8.0) refers to teaching a CE course or program that is not part of the curriculum at an institution of higher education.

- 1.0 A licensee may submit an individual application for review and approval of teaching activities to meet a portion of the continuing education requirement for license renewal as stated in section 4755.53 (A) (2), (3), and (4) of the Ohio Revised Code. The licensee must also comply with all laws, rules, and standards governing CE activity for physical therapists and physical therapist assistants in the State of Ohio.**
- 2.0 Teaching activities must take place as part of an organized program of learning, directly related to the practice of physical therapy, professional responsibility, ethical obligations, or similar subjects.**
- 3.0 The course syllabus or outline must contain:**
 - 3.1 Clearly stated learning objectives that directly support the content and format of the course.
 - 3.2 A bibliography of at least five references published during the past seven years based on the course date that support the content of the course. Five of these references must be from peer-reviewed or editor-reviewed sources.
 - 3.2.1 Due to inconsistencies of artificial intelligence performance, if references provided are not found to be valid, the reference will not be accepted towards the bibliographic requirement of five references published within the last seven years based on course date.
 - 3.3 A timed agenda and outline of the course's or program's content.
 - 3.4 A mechanism for students/participants to evaluate the quality of the course content and instruction.
 - 3.5 If a course syllabus does not include all of these elements, a separate document that includes the missing information may be provided.
- 4.0 Teaching activities may take place in an institution of higher education or any setting appropriate for the content and objectives of the course or program.**
- 5.0 A maximum of 12 CEUs for a physical therapist, or six CEUs for a physical therapist assistant may be awarded for teaching activities during a biennial renewal period.**
- 6.0 Teaching a course that is part of the curriculum of an institution of higher education in a capacity as a faculty member of the institution:**
 - 6.1 Applicants must verify their teaching by providing:
 - 6.1.1 A copy of the course description from the college catalog.
 - 6.1.2 Verification that the course actually was taught during the biennial reporting period.
 - 6.1.3 A course syllabus or class schedule identifying the applicant as a faculty member teaching the course.
 - 6.1.4 A course syllabus or outline that contains all of the items listed under Section I (3.0) of this policy.

- 6.2 For a faculty member with sole responsibility for a course, CEUs will be awarded based on .5 CEU for each credit hour in a semester-based course or an equivalent portion of a CEU for each credit hour in a quarter-based or trimester-based course taught. (See Section 4755.53(A) (2) of the Ohio Revised Code).

7.0 Teaching a course (or part of a course) that is part of the curriculum of an institution of higher education in a capacity other than as a faculty member:

- 7.1 Applicants must verify their teaching by providing:
- 7.1.1 A copy of the course description from the college catalog.
 - 7.1.2 A class schedule identifying the applicant as an instructor/lecturer for a particular course or portion of a course.
 - 7.1.3 Verification that the course actually was taught during the biennial reporting period.
 - 7.1.4 A course syllabus that contains all items listed under Section I (3.0) in this policy.
- 7.2 One CEU will be awarded for teaching one clock hour of a course. (See Section 4755.53(A) (3) of the Ohio Revised Code.)

8.0 Teaching a continuing education course or program that is not associated with academic credit at an institution of higher education:

- 8.1 Applicants must verify their teaching by providing the course/program information specified in Section I (3.0) of this policy and documentation of teaching from the sponsor, such as a course brochure.
- 8.2 CEUs will be awarded based on the number of contact hours of teaching a course/program X 3 for the first time and X .5 CEU per hour of teaching the same course/program subsequent times. (See Section 4755.53 (A) (4) of the Ohio Revised Code.)

SECTION J

POLICY ON DISTANCE EDUCATION

Purpose: To describe types of distance education activities that may be acceptable to meet the standards for license renewal and to identify the criteria by which these continuing education activities will be evaluated.

References: Section 4755.52(B)(3) of the Ohio Revised Code and the International Association for Continuing Education and Training (IACET), which contains a definition of and guidelines for distance education.

Definition: "Distance education is the acquisition of knowledge and skills through mediated information and instruction, encompassing all technologies and other forms of learning at a distance." (IACET)

Examples include educational activities provided by video or audio tapes, DVDs, recorded webinars, CD-ROM, web-based technology, or printed courses and study guides.

- 1.0 Distance education programs and courses must comply with all laws, rules, and standards that govern the approval of other CE activities acceptable for license renewal of physical therapists and physical therapist assistants in the State of Ohio as described in the first sections of this document.**
- 2.0 A licensee may acquire all or part of the required number of CEUs in a biennial renewal period through one or more distance education programs.**
- 3.0 The number of CEUs awarded for a distance education course or program shall be based on a thorough review of the course materials.**
- 4.0 A sponsor or individual licensee applying for approval of a distance education activity or program must submit the following:**
- 4.1 A copy of or access to all written course materials or a detailed topic outline of the course.
 - 4.2 Evidence that the course is relevant to physical therapy and contains current, high-quality intellectual or practical content designed to improve the professional knowledge or skills of the learner.

- 4.3 A bibliography of at least five references published within the last seven years based on the course date that provides evidence to support the course content. Five of these references must be from peer-reviewed or editor-reviewed sources.
 - 4.3.1 Due to inconsistencies of artificial intelligence performance, if references provided are not found to be valid, the reference will not be accepted towards the bibliographic requirement of five references published within the last seven years based on course date.
- 4.4 Evidence that the program or course was developed and prepared by individual(s) qualified to provide the educational activity.
- 4.5 Learning objectives that are congruent with the course content and that indicate the expected outcome(s) for the learner.
- 4.6 A sample (draft) or description of the mechanism(s) used to verify a participant's enrollment in and completion of the course or program such as an attestation of course completion, embedded questioning with distance learning materials, inability to fast forward through on-line content, inability to access the post-test prior to reviewing course materials, tracking log-on time, etc..
- 4.7 A sample (draft) or description of the mechanism(s) showing completion of the course or program, such as a certificate or letter of completion.
- 4.8 A sample (draft) of the course or program evaluation form to be completed by the participant.
- 4.9 An explanation by the sponsor/author of how the anticipated number of contact hours necessary to complete the course or program and the number of CEUs requested was calculated, i.e. pilot study, word count, video run time, etc.
- 4.10 A method for evaluation of the student's learning (i.e. post-test, case studies, competency testing, etc.).

SECTION K

POLICY ON DATA MAINTAINED FOR COURSE SPONSORS

Purpose: To identify how a record of CEU approvals is recorded and maintained in the OPTA database.

- 1.0 Upon approval of a CE activity by a CE Reviewer, the OPTA shall maintain a computer database of all courses approved for the current biennial license renewal period.**
- 2.0 The OPTA CE database will contain an organizational summary of courses submitted by sponsors and approved by the OPTA that includes:**
 - 2.1 CE course title and date(s).
 - 2.2 CEUs awarded.
 - 2.3 Ohio approval number and approval period.
 - 2.4 Name and address of sponsor.
- 3.0 Course approvals are valid for one year from the course date entered on the application or the first date the course is offered**
- 4.0 The OPTA shall provide a complete listing of all approved and denied courses, which were submitted by sponsors and reviewed, on the OPTA web site.**
 - 4.1 Approved and denied courses can be accessed on the OPTA web site at www.OhioPT.org.
 - 4.2 A summary record of approved and denied CE activities also will be maintained at the OPTA office for the term of the biennium in which it is approved or denied.
- 5.0 Applications are kept on file by OPTA for a period of time as advised by the PT Section of the OT, PT, AT Board.**