

OCA's CE Request Process

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The Plan for Today

- ▶ Review eligibility criteria to request CE hour approval
- ▶ Review application components, including templates
- ▶ Common issues in applications
- ▶ Approval letter and post event responsibilities
- ▶ Prioritizing accessibility in your events
- ▶ Questions

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Exciting news!

- ▶ We are now able to approve CE hours for counselors, social workers and marriage and family therapists
- ▶ Licensed chemical dependency professionals can use our CE hours as well
- ▶ We are exploring approval for the home study format
- ▶ Our goal? To help every OCA chapter, division and committee hold at least one successful CE event per year!



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Handouts

- ▶ 2020 OCA CE Approval Submission Form and Checklist
- ▶ Common Issues Impacting CE Approval
- ▶ Conference Session Information template
- ▶ Universal Design tip sheet (2)



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Why we need what we need...



- ▶ Adhere to commitment to assist chapters, divisions and committees to provide high quality professional development content
- ▶ Support the continued education and development of our members and our field
- ▶ ... We also get audited every 2 years by CSWMFTB to retain our approval status

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Behind the scenes...



- ▶ Submitted application is first reviewed by the Chair to ensure it is complete and to address any issues
- ▶ Application and materials sent to all PDC members to review
- ▶ PDC members vote via email, and hold discussion when necessary

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Behind the scenes...

- ▶ Chair advises requestor of approval outcome and sends official approval letter OR assists with revisions
- ▶ After the event, requestor provides Chair with post event materials
- ▶ The Chair enters the event on CE Broker and enters roster information
- ▶ The Chair is responsible for archiving all event information - with your help!

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Eligibility criteria review

- ▶ Must be submitted by the leadership of an OCA chapter, division or committee
- ▶ Individual OCA members, private practices, community agencies are not eligible
- ▶ HOWEVER - co-sponsorships and collaborative events ARE encouraged
 - ▶ Great way to reach a wider community
 - ▶ Be mindful of pricing ethics
 - ▶ OCA chapter, division or committee leadership must be the ones submitting the application

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Application review and walk through

- ▶ Submission deadline = **30 working days** prior to the date of the event
- ▶ Complete each section fully and make sure all information aligns appropriately
- ▶ Additional information to include for virtual events
 - ▶ Pre-registration strongly recommended
 - ▶ Platform being used
 - ▶ Attendance
 - ▶ Evaluations

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Application review



- ▶ Supplemental materials to include
 - ▶ Presenter(s) CV
 - ▶ Copy of evaluations, sign-in sheets, and CE certificate (if not using template)
 - ▶ If not using templates, still consult them for necessary wording
 - ▶ Advertising drafts
 - ▶ Do not state “CE’s pending” instead “CE’s applied for” if want to start advertising prior to CE approval
- ▶ All materials - the application and supplemental materials - should be emailed all at once

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Application review - Breakout Sessions and Conferences

- ▶ All day workshops with multiple sessions, conferences with breakout session options over the span of one or more days
- ▶ Utilize the application as a summary of the event
 - ▶ Make sure to list all of the possible hours, not just the total possible one attendee could get for the event

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Application review - Breakout Sessions and Conferences

- ▶ Use the “Conference Session Information template”
 - ▶ One for each session
- ▶ Consider standardized sign-in and evaluations for all sessions
- ▶ All materials - including the application and all supplemental materials - still need to be all turned in at once

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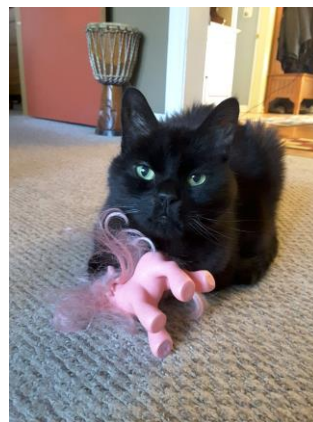
Application Review - Breakout Sessions and Conferences

- ▶ Try to be mindful of submitting materials with corresponding orders
 - ▶ For example, match the order of CV's to the order on the Conference Session Information Template - that makes it easier for the PDC members to scroll through and compare, as opposed to having to "hunt" for matching materials
- ▶ For larger conferences or a high number of breakout sessions, may need to utilize a shared drive to submit materials
 - ▶ Make sure to set up access via a link which can be shared

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Common Issues in Applications

- ▶ Content areas
- ▶ Incomplete applications/ information doesn't align
- ▶ Presenter expertise and background
- ▶ Client care focus



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Common Issues in Applications

- ▶ Supervision focus
- ▶ Inclusion of clinical and/or evidence-based content
 - ▶ Specific needs for law and ethical codes being referenced
- ▶ Pre-registration, attendance and evaluation

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Approval letter

- ▶ Your event is not officially approved for CE hours by the OCA PDC until you receive an Approval Letter via email from the Chair
- ▶ Approval letter includes:
 - ▶ Date of approval
 - ▶ Name of requester, title of program, and chapter/division/committee
 - ▶ Number and type of CE's awarded
 - ▶ Both OCA CE provider numbers to be included on certificates
 - ▶ Post-event responsibilities

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Post Event Responsibilities

- ▶ Provide - either physical or digital - CE certificate to all attendees
 - ▶ Consider reminding attendees to watch for the event to show up on their CE Broker account and then upload their individual certificate for CSWMFTB auditing purposes
- ▶ Send OCA Chair:
 - ▶ Copy of sign-in sheet OR evidence of attendees if virtual
 - ▶ Names and FULL license number
 - ▶ Copy of certificate and all advertising used
 - ▶ Copy of evaluations
 - ▶ Can also be a summary of evals if using a virtual polling format, but still needs to include all data

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Prioritizing Accessibility at Your Events

- ▶ Consider a “Universal Design” mindset
 - ▶ Designing all aspects of the event with accessibility in mind from start to finish
 - ▶ Accessibility begins with advertising
 - ▶ Consider asking about accessibility needs during registration
 - ▶ Ensure that your venue or virtual format can attend to accessibility needs

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Prioritizing Accessibility at Your Events: Suggestions

- ▶ Have an open question about accessibility on the registration or highlight who to contact for accessibility needs
- ▶ Common accessibility needs:
 - ▶ Service animals
 - ▶ Handicap accessible venues - including elevators and accessible restrooms near by
 - ▶ Screen reader ready handouts
 - ▶ Presenters that use microphones (even if they don't think it's necessary)
 - ▶ Closed captioning on virtual platforms or with any videos - with instructions
 - ▶ Content alerts
 - ▶ Sending handouts early so can load into software programs
 - ▶ Wifi access and statement supporting the use of devices

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Questions?

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Thank you!

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