

# REQUIREMENTS FOR CONDUCTING AN ALSO® REFRESHER COURSE – *Revised 11/11/08*



## OBJECTIVES

At the conclusion of this document, instructors will be able to:

1. List the responsibilities of the course director and faculty participants who are involved in teaching a refresher course.
2. Describe the meeting space requirements needed to conduct a refresher course.
3. Prepare a budget for conducting a refresher course.
4. Develop a promotional brochure in adherence with the Accreditation Council of Continuing Medical Education (ACCME) guidelines.

## INTRODUCTION

Planning and conducting an ALSO® Refresher Course is a very rewarding, yet time consuming, process. Course directors and instructors must be knowledgeable about the requirements for conducting a course. This document provides a clear description of the responsibilities of the course director, as well as other levels of instructors. Adherence to these requirements is essential to ensure consistency for each ALSO® Refresher Course conducted. Additional information may be found on the ALSO® website at [www.aafp.org/also](http://www.aafp.org/also).

## INSTRUCTOR QUALIFICATIONS AND RESPONSIBILITIES

An individual who wishes to be an ALSO® Refresher Course Director must be a current ALSO® Advisory Faculty. With the AAFP's direction and assistance, it is the role of the course director to oversee and manage all aspects of implementing the course. Although a coordinator or assistant may be used to assist with planning and implementation, the course director is ultimately responsible for ensuring that the course meets all course requirements specified in this chapter and in the Memorandum of Agreement from the AAFP. The course director must remain on-site during the entire course.

The AAFP utilizes an established procedure for identifying and analyzing continuing medical educational needs and interests of prospective participants. Each course director is required to determine if there is an identified need in his/her local community to offer the ALSO® Refresher Course. The course director should describe the need

and the mechanism used to determine this need, and submit this information on the Refresher Course Request/Authorization Form.

The course director is responsible for the selection of appropriate faculty. Currently, the faculty must consist of one additional ALSO® Advisory Faculty member and at least 50 percent ALSO® Approved Instructors (see subsequent pages for faculty definitions and responsibilities). The 50 percent requirement may include ALSO® Approved Instructors or ALSO® Instructor Candidates. The remainder of the faculty may include additional qualified health professionals who are comfortable with the goals and objectives of the course, and who agree to utilize standard course methods and materials. The optimal faculty-participant ratio is 1:5, and no more than 1:6.

The course director is required to involve the advisory faculty member in all aspects of the planning and development of the course to ensure that quality and consistency are maintained.

When AAFP Prescribed Credit is offered (*Refer to page 7, Continuing Medical Education Approval, for information on application for CME credit*) the course director is responsible for ensuring that all faculty for the course complete the required faculty disclosure forms in compliance with the ACCME Standards for Commercial Support of Continuing Medical Education, and **maintain copies for each faculty member** in the course file. The ALSO® staff can provide *sample* documents of these forms.

Required disclosure forms are to be kept on file by the course sponsor:

- Continuing Medical Education Disclosure Policy on Faculty and Provider Relationships
- Disclosure on Discussion of Unapproved Uses of Products

The course director is also responsible for completing and/or compiling all required ALSO® course reporting forms, including:

- Participant Information Form
- Faculty Information Form
- Instructor Candidate Evaluation Form (if applicable)
- Course Evaluation Forms
- Physician Questionnaire Forms

These forms can also be found on the ALSO® web site at [www.aafp.org/also](http://www.aafp.org/also). They are also included in the ALSO Course Materials CD ROM that is sent to the course director/coordinator prior to each approved course. The course director should return all completed forms to the AAFP within two weeks of the course completion date (*refer to page 10 for detailed instructions*).

A brief summary of activities that require the course director's involvement when conducting a course include the following:

- Strictly adhering to the Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Support of Continuing Medical Education
- Involving the AAFP in planning and developing the course
- Involving the advisory faculty member in all stages of the planning and development of the course
- Organizing a faculty meeting prior to the course
- Organizing equipment and meeting rooms
- Presenting opening announcements and introductions
- Being available for questions from faculty and participants
- Assuring that the course runs smoothly and according to schedule

### **ALSO® Advisory Faculty**

In addition to the course director, there must be at least one approved ALSO® Advisory Faculty member for each ALSO® Refresher Course. Individuals who wish to be designated as advisory faculty must:

- Have served as a course director for an ALSO® Provider Course.
- Have achieved ALSO® Approved Instructor status
- Have completed and submitted an application form, along with a letter of recommendation from a current advisory faculty member.
- Receive final approval from the ALSO® Advisory Board.

The primary responsibility of an advisory faculty member is to maintain the integrity and consistency of the ALSO® Program. This can be achieved by:

- Ensuring that the course director adheres to all AAFP requirements for conducting an ALSO® Refresher Course.
- Actively assisting the course director with planning and coordination of the refresher course, including faculty selection.
- Advising the course director on-site during the course and suggesting possible solutions if problems occur.
- Observing and evaluating instructor candidates teaching at refresher courses, using the ALSO® Instructor Candidate Evaluation Form, and submitting the forms to the ALSO® staff. The advisory faculty member must discuss the evaluation with the instructor candidate.
- If appointed by the ALSO® Advisory Board, serving as a liaison to an international entity.
- Remaining on-site during the entire refresher course.

## **Approved ALSO® Instructor/Instructor Candidate**

As previously mentioned, a minimum of 50 percent of the faculty at each refresher course must be Approved ALSO® Instructors, or ALSO® Instructor Candidates. An individual who wishes to achieve ALSO® Approved Instructor status must:

- Be a licensed physician, certified nurse midwife, or registered nurse and
- Achieve successful completion of the ALSO® Instructor Course to gain designation as an “ALSO” Instructor Candidate.”
- Have his/her teaching performance observed and evaluated within one year by an advisory faculty member. If the evaluation does not occur within a year, the Instructor Candidate’s status reverts back to provider status. The advisory faculty member must complete and sign an Instructor Candidate Evaluation Form and submit it to the AAFP. Only then will a wallet card be issued designating the individual as an Approved Instructor.

The responsibilities of instructor candidates and approved instructors include all of the following:

- Willingness and ability to assist the course director and advisory faculty in maintaining the consistency and integrity of the ALSO® Program by ensuring the course adheres to all AAFP requirements for conducting a provider course.
- Willingness and ability to assist the advisory faculty member and course director in answering participants’ questions regarding course content.
- Willingness and ability to function as effective team leaders, to exhibit good leadership skills, and to be able to convey a sense of order while role-playing in the workstations.
- Willingness and ability to remain on-site during the entire course.

The ALSO® Approved Instructor status may be maintained by teaching in three ALSO® courses within a five year period of time. Valid teaching experiences include teaching in provider, instructor or refresher courses. Instructors must also maintain an active maternity care practice, either personally, or through the supervision of residents. As long as an approved instructor maintains active status, retaking the ALSO® Provider Course is not necessary.

## **Additional Faculty**

The course director selects other individuals who wish to serve as faculty for the refresher course. Individuals may include qualified healthcare professionals who are comfortable with the goals and objectives of the course, and who agree to use standard course methods. Responsibilities of additional faculty include:

- Adherence to all AAFP requirements for conducting a refresher course
- Familiarity with all slides associated with the topic they are presenting
- Consultation with the course director and advisory faculty to answer any questions regarding content, or how material should be presented
- Arrival at the course 30 minutes prior to their presentation
- Participation in the pre-course faculty meeting

- Presentation of their topic(s) in a manner consistent with the course materials

### **Course Coordinator (if applicable)**

Administering an ALSO® course can be labor intensive and requires a large amount of time to plan and implement. It is helpful for the course director to appoint a course coordinator to help in this process. The course coordinator is encouraged to be the main contact with the ALSO® staff to organize the course.

### **Pre-course Faculty Meeting**

Faculty orientation is expected to be accomplished in a pre-course faculty meeting, conducted by the course director. Course faculty should receive written notice, reinforced by phone call(s), about the importance of this pre-course meeting and their personal pre-course preparation. *Minimum* personal planning time for *experienced* faculty to adjust to *each* new lecture and workstation they will teach is one to two hours, in order to become familiar with the content and slides.

The purpose of the pre-course meeting is as follows:

- Reinforce the evidence-based philosophy and materials of the course curriculum
- Review the structural changes in the course
- Reinforce the small group interactive teaching approach
- Review the plan and methods for testing, including written test and megadelivery scoring
- Emphasize that participants will be tested on all components, not just what is reviewed in the course
- Answer specific questions about course content and procedures

The pre-course meeting can be conducted any time close to the course. Common timing would be the evening before the day of course. This schedule assumes that all faculty have ALSO experience, show up on time, have read these orientation materials and have prepared their own lectures and workstations ahead of time:

- 10 minutes: Welcome and introduction of faculty
- 10 minutes: Newly revised chapters and one page evidence based addendums
- 10 minutes: Explain the color groups and how the participants will move from room to room
- 20 minutes: Practice/demonstration of the combined PPH/Maternal Resuscitation workshop
- 10 minutes: Practice/demonstration of OB cases workstation
- 10 minutes: Practice/demonstration of fetal surveillance workstation
- 10 minutes: Practice/demonstration and critique of a megadelivery test and scoring procedure.
- 10 minutes: Review of course schedule, assignments, AV equipment and room layout.

Total: 1.5 hours – at a minimum!

## **COURSE / CONTINUING MEDICAL EDUCATION APPROVAL**

**To conduct a course and receive approval for CME credit hours, the course director is required to submit a completed ALSO® Refresher Course Request/Authorization Form, a completed ALSO® Faculty form and a tentative course schedule / agenda to the AAFP.** There is no Accreditation application fee required to administer an ALSO® course. Once the documents listed above have been reviewed, the ALSO staff will forward the information to the AAFP's Accreditation department for CME review. The course director will also receive an ALSO course approval letter, materials order form and a written Memorandum of Agreement, which defines the course director's responsibilities. The course director must then sign the agreement and return it to the AAFP. Course materials will not be shipped to the course director without the signed Memorandum of Agreement. The Course Request/Authorization form may be downloaded online at [www.aafp.org/also](http://www.aafp.org/also).

## **PARTICIPANTS**

Course participants may include physicians, residents, nurse midwives, labor and delivery nurses, physician assistants and other maternity care providers. It is expected that course participants have at least a basic knowledge of prenatal, antepartum, and intrapartum care. The small size of each provider course is reflective of the faculty-intensive and "hands-on" nature of the course. Maximal course size is approximately 30 participants, with the average being 25.

## **FINANCIAL ARRANGEMENTS**

Financial arrangements are the responsibility of the course director who assumes all financial risk. An electronic budget worksheet is available online at [www.aafp.org/also](http://www.aafp.org/also), which will help the course director determine projected revenue and expenses. The course director should decide which faculty expenses (transportation, lodging, meals) will be covered by the course and what honoraria will be offered. Faculty honoraria vary, but the ALSO® Advisory Board recommends the following dollar amounts:

- Advisory Faculty                      \$500 - \$750
- Approved Instructor                 \$500
- Instructor Candidate                 \$350 - \$500
- Other Faculty                          \$300

## COURSE PROMOTION

While promoting an ALSO® Refresher Course, the course director must agree to abide by all copyright and trademark laws as they apply to the ALSO® name, logo, and course materials. The ALSO® acronym and logo may only be used for course promotion. Any other use such as gift items or give-away items (such as mugs, t-shirts, buttons) requires written approval in advance from the AAFP.

A promotional brochure for the course must be designed and produced by the course director and sent to the AAFP for approval **before** the brochure is printed. A standard ALSO® course brochure “template” is available at [www.aafp.org/also](http://www.aafp.org/also) and must be used when creating the course brochure (refer to Appendix B).

**If CME credits are awarded by the AAFP, the brochure must contain the following statements worded exactly as presented here:**

### **CME Credit Statement:**

This activity has been reviewed and is acceptable for up to \_\_\_\_\_ credit(s) by the American Academy of Family Physicians. \_\_\_\_\_ of these credit(s) conform to the AAFP criteria for evidence-based CME clinical content. CME credit has been increased to reflect 2 for 1 credit for only the EB CME portion. When reporting CME credit, AAFP members should report total Prescribed credit earned for this activity. It is not necessary for members to label credit as evidence-based CME for reporting purposes.

Misuse of the statement may result in withdrawal of AAFP credit hours and/or denial of future application to the AAFP for program approval.

The brochure must also contain the following:

- Course Objectives
- Course Schedule
- Course Disclaimer
- Faculty Roster

After receiving AAFP approval, the course director should mail the brochure to potential attendees at least three to six months prior to the course. Course materials will not be sent to the course director until the brochure is approved by the AAFP.

## COMMERCIAL SUPPORT

In keeping with the ACCME “Standards for Commercial Support of Continuing Medical Education,” funds from a commercial source should be in the form of an educational grant for the support of programming and the terms, conditions and purposes of such grants should be documented by a signed agreement. **The commercial support must be acknowledged in printed materials, including the course brochure and course handouts, though reference must not be made to specific products.**

CME faculty and the coordinating institution’s affiliations and relationships with commercial supporters should be disclosed to participants in program materials prior to

the educational activities, or from the podium. In compliance with the ACCME Standards, copies of all faculty disclosures must be kept on file with the course sponsor.

## **COURSE CURRICULUM**

### **REQUIRED LECTURES**

As of **October 15, 2008**, the Postpartum Hemorrhage and Maternal Resuscitation lectures will be combined into a workstation format. The ALSO Course Materials CD ROM, which is distributed to ALSO course sponsors, provides an instructional video and crib sheets to assist faculty with the implementation of this curriculum change.

### **REQUIRED LECTURES**

The only required lecture for the refresher course is the “Safety in Maternity Care” lecture. It is routinely given in the afternoon, just prior to the testing stations.

### **REQUIRED WORKSTATIONS**

The five required workstations for the refresher course are as follows:

1. Intrapartum Fetal Surveillance
2. Shoulder Dystocia
3. Assisted Vaginal Delivery
4. PPH / Maternal Resuscitation
5. OB Cases

## **COURSE CURRICULUM MATERIALS**

The AAFP will send course materials to the course director approximately six weeks before the course is scheduled. The course director should then send the ALSO® syllabus to participants **at least one month in advance of the course**. This provides ample opportunity for the participant to read the syllabus and to formulate questions prior to the course. It is helpful to enclose a reminder with the syllabus, telling attendees to bring the syllabus to the course since additional syllabi will not be available. Paper slides are now contained at the end of each chapter. A sample timeline for planning the course is available in Appendix A.

## **COURSE EQUIPMENT/COURSE FACILITIES**

### **Equipment and supplies to be obtained by local coordinating institution:**

#### **1. Audiovisual Equipment**

Classroom style seating: main lecture hall large enough to seat all participants and faculty – set as 2 people per 6’ table or 3 people per 8’ table

- ALSO® Slide Set CD ROM
- LCD Projector
- Large Projection Screen

- Laser Pointer with Mouse Remote for Client-provided Laptop
- Large Flipchart with Markers
- Four Lavalier Microphones
- Lectern with Microphone
- Overhead Projector

Breakout Rooms: separate workstation rooms set in theater style (only chairs, no tables) of 12 people to be placed in the middle of the room and (2) two 6' tables (place the 6' tables in opposite corners/sides of room). Each room will receive the AV equipment listed below (if have 36 participants, will have three breakouts, 48 participants, will have four breakouts and 60 participants, will have five breakouts):

- LCD Projector
- Projection Screen (size appropriate for the size of the room)
- Flip Chart with Markers

## 2. Clinical Equipment

Each mannequin workstation should have two pelvic mannequins along with two term fetal and two preemie fetal mannequins. Each room should also have two sets of forceps and two vacuum extractors. There should also be two six-foot long tables on each side of the workstation rooms for the equipment.

*Mannequins can be obtained from:*

- The American Academy of Family Physicians (**for rental only**): call (800)-274-2237, ext. 6556. May be rented on a first come, first serve basis.
- CPR Savers ([www.cpr-savers.com](http://www.cpr-savers.com)): for the discounted price of \$650.95, contact Brian at (800) 480-1277.
- Armstrong Medical Industries, Inc. ([www.armstrongmedical.com](http://www.armstrongmedical.com)): 575 Knightsbridge Parkway, Lincolnshire, Illinois, 60069. Customer Service (800) 323-4220 or 847-913-0101.
- Simulaid, Inc. ([www.simulaid.com](http://www.simulaid.com)): 12 Dixon Avenue, Woodstock, New York, 12498. (800) 431-4310 or 845-679-2475.
- Gaumard Scientific ([www.gaumard.com](http://www.gaumard.com)): 14700 SW 136 Street, Miami, Florida 33196-5691. 1-800-882-6655. Email: [sima@gaumard.com](mailto:sima@gaumard.com)

*Vacuum Extractors can be obtained from:*

- Columbia Medical Inc., A division of Utah Medical ([www.utahmed.com](http://www.utahmed.com)): PO Box 1530, Redmond, Oregon 97756-1530. (800) 548-8667.
- Cooper Surgical: 95 Corporate Drive Trumbull, Connecticut 06611. (203) 601-5200, (800) 243-2974
- Clinical Innovations, 747 West 4170 South Murray, Utah 84123. (801) 268-8200

**Equipment and supplies to be provided by the AAFP:**

1. ALSO® Syllabus 1 per attendee (\$145 each) - Price Increase Effective October 15, 2008
2. ALSO® Syllabus on CD Rom 1 per attendee (\$135 each)
3. Instructor Manual 1 per new instructor (\$50 each)
4. ALSO® Slide Set CD ROM with all updated slides 1 per course (\$75) (REQUIRED)

*\*Course sponsors are required to purchase the ALSO® Slide Set CD ROM at \$75.00 for each course offering to ensure the most current information is being presented at each course.*

5. A CD ROM with the following course reporting forms:

Written Examination, Examination Answer sheet, Examination Answer Key, Evaluation Forms, Megadelivery Instructions and Score Sheet, Participant/Faculty Forms, Course Evaluation Forms, OB cases, fetal surveillance tracings, NICHD guidelines and Instructor Candidate Evaluation Forms.

***The course sponsor will be invoiced at the time the course materials are shipped. Payment must be made within 30 days of the date of the invoice. Course completion certificates will not be sent until invoice is paid in full. The AAFP will only accept the return of defective or damaged products, within 30 days of receipt, for replacement or refund. Otherwise, per the AAFP policy, there are no returns of course materials. Shipping and Handling charges are non-refundable.***

**COURSE COMPLETION**

**All required course forms will be sent to the course director / coordinator on a CD ROM. You may download the documents for printing and duplicating.** The accurate completion of the required course reporting forms is extremely important to ensure the quality and integrity of the ALSO® records. Course participants, as well as faculty, are entered into the ALSO® database. This allows the AAFP ALSO® staff to track expiration dates for provider renewal status, faculty status (instructor candidate/approved instructor/advisory faculty), and test scores. The following required **typed forms** are to be completed and emailed to the ALSO® staff for processing within two weeks following course completion (available at [www.aafp.org/also](http://www.aafp.org/also)):

- Participant Information Form
- Faculty Information Form
- Instructor Candidate Evaluation Forms (if applicable)

The Course Evaluation Forms and Physician Questionnaire Forms should be mailed to:

ALSO  
American Academy of Family Physicians  
11400 Tomahawk Creek Parkway  
Leawood, KS 66211-2680

Course sponsors should retain the written exam answer sheets and megadelivery score sheets for their files. These documents no longer need to be submitted to the ALSO staff as this information must be recorded on the Participant Information Form.

ALSO® staff will tabulate all course evaluation forms. The final evaluation report will be emailed to the course coordinator six to eight weeks following the ALSO® department's receipt of the course evaluation forms.

**Once all course forms have been completed and returned to the ALSO staff, certificates will be emailed to the course coordinator to print and distribute to course participants (Provider Wallet Cards will be mailed). Per the AAFP payment guidelines, payment for invoices are due within 30 days of receipt. Course completion certificates will be issued after payment is received in full.**

Questions regarding the return of course materials or billing should be directed to ALSO® staff at (800) 274-2237, ext. 6554, or (913) 906-6000, ext. 6554.

APPENDIX A

Sample Timeline for Planning an ALSO® Course

Timeline	Planning Schedule
4 + months prior	Notify AAFP of intent to conduct an ALSO® course via the ALSO® Course Request/Authorization Form
4 + months prior	Sign the Memorandum of Agreement and return to ALSO® staff
4 + months prior	Determine the number of mannequins needed. Complete the mannequin rental request form, and return to ALSO® staff if applicable
4 + months prior	Obtain meeting space and hotel rooms
3 + months prior	Select faculty - mail confirmation letters
2 + months prior	Distribute ALSO® approved promotional brochures and accept registrations
2 + months prior	<b>Order CD slide set</b>
2 + months prior	Obtain forceps and vacuum extraction apparatus, along with other necessary equipment as needed
6 + weeks prior	The ALSO® staff will ship the required number of syllabi, instructor manuals, and a CD ROM with all of the forms necessary for conducting an ALSO® course, including the written examination, answer key and <b>billing invoice</b> .
4 + weeks prior	Course director should send the ALSO® Syllabus to each registrant
4 + weeks prior	Send ALSO® Instructor Manuals to each instructor. Paper slides for the lectures are contained in the final section of the syllabus.
2 weeks after	Complete the Faculty Information Form and the Participant Information form. Email all required course completion forms to ALSO® staff; mail course evaluation forms.
4 weeks after	After receiving the required course forms and invoices are paid in full, ALSO® staff will email course completion certificates to course coordinators to print and distribute (Provider Wallet Cards will be mailed).

## ALSO® PROMOTIONAL BROCHURE

**Advanced  
Life  
Support in  
Obstetrics (ALSO®)  
REFRESHER COURSE**

American Academy of  
Family Physicians



Program Date/Location

Local Coordinating  
Institution/Grantor  
Information

**This course is directed  
primarily toward  
maternity care  
providers, including  
physicians, nurses,  
and certified nurse  
midwives.**

Front Cover

**This brochure is  
designed to be done in  
landscape, double  
folded. (Although for  
the purposes of this  
manual, it appears in  
portrait)**

**ALSO® Refresher  
Course**

This one-day course is designed for maternity care providers whose ALSO® status is about to or has expired. Individuals who have not previously completed an ALSO® Provider Course will not be allowed to register. Participants successfully completing the ALSO® Refresher Course will achieve another five year provider status.

**OVERALL COURSE  
OBJECTIVES**

- Discuss ways of improving the management of obstetrical urgencies and emergencies, which may help standardize the skills of practicing maternity care providers.
- Discuss the importance of utilizing regional maternity care services and identify possible barriers which might limit access
- Successfully complete the course written test and megadelivery testing station

**ACCREDITATION  
(CME) STATEMENT  
FOR PHYSICIANS:**

This activity has been reviewed and is acceptable for up to \_\_\_\_ credits(s) by the American Academy of Family Physicians. \_\_\_\_ of these credit(s) conform to the AAFP criteria for evidence-based CME clinical content. CME credit has been increased to reflect 2 for 1 credit for only the EB CME portion. When reporting CME credit, AAFP members should report total Prescribed credit earned for this activity. It is not necessary for members to label credit as evidence-based CME for reporting purposes.

Additional  
Information

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***Course Disclaimer***

The material presented at this course is being made available by the American Academy of Family Physicians for educational purposes only. This material is not intended to represent the only, nor necessarily the best, methods or procedures appropriate for the medical situations discussed, but rather is intended to present an approach, view, statement, or opinion of the faculty which may be helpful to others who face similar situations.

The AAFP disclaims any and all liability for injury, or other damages, resulting to any individual attending this course and for all claims which may arise out of the use of the techniques demonstrated therein by such individuals, whether these claims shall be asserted by a physician, or any other person.

Every effort has been made to assure the accuracy of the data presented at this course. Physicians may care to check specific details, such as drug doses and contraindications, in standard sources prior to clinical application.

This Course has been determined to be a Level 2 classification under the AMA PRA Credit and Classification Guidelines. The AAFP does not certify competence upon completion of the ALSO® Provider Course, nor does it intend this course to serve as a basis for requesting new or expanded privileges.

**08/20/08**