

**THE CANADIAN DIABETES EDUCATOR
CERTIFICATION BOARD**

2018

**CERTIFICATION
MAINTENANCE**

by

**CREDIT PORTFOLIO
HOW TO GUIDE**



**2018 Certification Maintenance
Application Deadline - FEBRUARY 1ST, 2018**

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2018 Application for Certification Maintenance by Credit Portfolio

Deadline: February 1st, 2018

Please refer to the Applying for Certification Maintenance by Credit Portfolio section of this guide for more details.

There are three steps to apply for Certification Maintenance by Credit Portfolio.

Step 1: Preparation:

- Your portfolio should be complete and properly organized (pgs.16 - 17, 2018 HTG)
- Complete your Credit Summary form (appendix C, 2018 HTG)
- Scan and have available for upload;
 - A copy of government photo identification
 - A copy of proof of professional license/registration
 - A copy of signature
- Have your payment information available

Step 2: Go to www.cdec.ca. Complete the online Application form, Credit Summary form and payment information. The online Application form and Credit Summary form will be available mid-November, 2017.

The deadline to complete the online Application form and Credit Summary form is February 1st, 2018.

Step 3: Send the CDECB office **1 paper copy of your portfolio and a second copy on a USB stick in PDF format or on paper.** (activity forms and all supporting documentation) **POSTMARKED NO LATER THAN FEBRUARY 1ST, 2018**

Certification Maintenance by Credit Portfolio
Canadian Diabetes Educator Certification Board
13909 Hurontario Street
Inglewood (Caledon), Ontario, L7C 2C9

To Confirm CDECB receipt of your portfolio please choose Courier or Express/Registered Mail. Retain mail/courier receipts as proof of on-time submission. CDECB does not confirm receipt of portfolios until the portfolios are processed. Portfolios are processed in order received and timing depends upon volume.

-IMPORTANT NOTE REGARDING SUPPORTING DOCUMENTATION-

You must send in all your supporting documentation with your portfolio.

Please visit our website (www.cdec.ca) for updates.

Important Notices

Regarding updated activity forms: you DO NOT have to copy information from an already completed activity form on to a newer version.

If you have used a previous version of the How to Guide and activity forms issued during your current Credit Collection Period you DO NOT need to redo the forms to meet the current requirements; e.g. If you have been using a 2013 HTG and 2013 forms you DO NOT need to redo your entries on the 2018 activity forms and meet the 2018 HTG requirements for that activity. However, if you use the 2018 activity forms you must meet the requirements listed for that activity in the 2018 HTG.

As of January 1st, 2014 we aligned our Credit Collection Year with the calendar year. Please review the Credit Collection Period section of the How to Guide for details (page 11).

Changes in 2018 HTG

- For those applying for CM in 2018, only one paper copy of your portfolio is required and the second copy may be on paper or on a USB stick in PDF format.
- Clarification on who may sign an activity form.
- Clarification on completing the Word format forms.
- Questions must be received by December 1st to guarantee a response before the application deadline.

Acronyms

CC -Credit Collection

CCP - Credit Collection Period

CDE® - Certified Diabetes Educator

CDECB - Canadian Diabetes Educator Certification Board

CGM - Continuous Glucose Monitoring

CM - Certification Maintenance

CM by CP - Certification Maintenance by Credit Portfolio

CME - Continuing Medical Education

CP - Credit Portfolio

DC - Diabetes Canada

DES - Diabetes Educator Section

DCPSC- Diabetes Canada Professional Section Chapters

FIT - Forum for Injection Technique

HTG - How to Guide for Certification Maintenance by Credit Portfolio

SMBG - Self-Monitoring of Blood Glucose

TDC - The Diabetes Communicator

Part 1

Certification Maintenance by Credit Portfolio

As an alternative to performing Certification Maintenance by exam, a CDE® may perform Certification Maintenance by Credit Portfolio (CM by CP).

The CM by CP process is based on a system of credits earned for professional development activities listed in this How to Guide that either **enhance competency** or **demonstrate professional leadership**. It recognizes the relevance of lifelong learning on professional development.

During your Credit Collection Period, you compile a portfolio by documenting these activities and related credits on the activity forms provided by CDECB. It is important to pay attention for any additional documentation, such as certificates of attendance, that may be required and to make sure these are also included in your portfolio.

Applications for CM can be made once a year. When you are ready to apply for CM by CP you must complete the online application and credit summary forms and send in one paper copy of your entire portfolio (activity forms and supporting documentation) to CDECB and a second copy of your entire portfolio in paper format or on a USB stick in PDF format by the application deadline; February 1st.

Results for the CM by CP process are mailed out at the same time as those for the exam. This is usually the first week of July.

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Building your Portfolio

Building a credit portfolio is intended to be a slow, steady process where you document your professional development activities on an ongoing basis during your Credit Collection Period.

If you wait until the last minute, it can be difficult to find records and recall activities done several years ago. Some activity forms require a signature. It is easier to get a signature just after an activity is completed than to wait until your CM by CP application is due. To help you get started, refer to Appendix A, *Organizing Your Portfolio*.

Documenting Activities

In order to collect credits the following conditions must be met:

- You **must** hold continuous registration with a Canadian health professional regulatory body **and** be a CDE®.
- The professional development activity must take place during your Credit Collection Period and, for some activities, during a Credit Collection Year. Any credits claimed for activities that occur before, or end after your Credit Collecting Period **will not be accepted**.
- The professional development activities must either **enhance competency or demonstrate professional leadership**.
- Activity forms must be legible and completed correctly. If required, the form must be signed and/or be accompanied with supporting documentation.

Credit Collection Period

As some activities have limits as to how many credits will be accepted in a “year”, the Credit Collection Period is divided into five Credit Collection Years.

The start of your Credit Collection Period/first Credit Collection Year depends on how you earned your current CDE® designation.

Revised Credit Collection Period/Credit Collection Years

On January 1st, 2014 we aligned our Credit Collection year with the calendar year. This also altered the Credit Collection Period dates. How this affects you will depend on how and when you earned your current CDE® certificate.

CDE®s who earned their designation in 2014 and later are required to follow the revised Credit Collection Period and Years as defined in the next section; “Credit Collection Period/Credit Collection Years”.

Those with CDE® certificates earned in 2013, please refer to the “2013 CDE®s use of the revised Credit Collection Period/Credit Collection Years” section below.

The application deadline for Certification Maintenance will remain February 1st of the year you elect to apply.

Credit Collection Period/Credit Collection Years

For CDE®’s who earned their CDE® designation after January 1st, 2014.

If you obtained your CDE® by exam for the first time then your first Credit Collection Year begins **June 1st** of the year you obtained your CDE® designation. This date also applies to candidates with a lapsed CDE® designation and later regained the CDE® designation.

If your current CDE® designation was obtained by Certification Maintenance, your first credit collection year starts **January 1st** of the year you performed certification maintenance.

Your 2nd to 5th Credit Collection Years will start January 1st and end December 31st.

December 31st of your fifth Credit Collection Year marks the end of your Credit Collection Period.

Table 1 summarizes the start and end dates of CDE®’s’ Credit Collection Period and Years.

Table 1: Summary of CDE®’s’ Credit Collect Period and Credit Collection Years

	Collection year	Start Date	End Date
Credit Collection Period	1 st	January 1 st (Certification Maintenance by Exam or Credit Portfolio) June 1 st (initial CDE® or regained CDE® by exam)	December 31 st
	2 nd	January 1 st	
	3 rd		
	4 th		
	5 th		

When you need to specify the Credit Collection Year for an activity, indicate it as the calendar year; e.g. 2014.

It is not necessary to collect any particular number of credits per year.

2013 CDE®s use of the revised Credit Collection Period/Credit Collection Years

If you earned your current CDE® designation prior to January 1st, 2014 the start of your Credit Collection period/ 1st Credit Collection year is unchanged i.e.,

- If you obtained your CDE® by exam for the first time then your first Credit Collection Year began **June 1st** of the year you obtained your CDE® designation. This date also applies to candidates with a lapsed CDE® designation and later regained the CDE® designation.
- If your current CDE® designation was obtained by Certification Maintenance, your first Credit Collection year started **February 1st** of the year you performed certification maintenance.

For CDE®s who earned their CDE® in 2013:

- Your first Credit Collection year will end December 31st, 2013. Your remaining four Credit Collection Years will run January 1st to December 31st.

Switching to the revised Credit Collection Year is indicated by using a single year for the Credit Collection Year; i.e. Credit Collection Year 2016 is January 1st to December 31st, 2016.

Activity Forms

During a Credit Collection period, six How to Guides will be issued. You may use the activity forms from any of them to document your professional development activities. Activity forms must be completed as described in their associated How to Guide; e.g. activity forms from the 2018 How to Guide must be completed as described in the 2018 How to Guide.

To download the activity forms go to www.cdec.ca and click on the top Credit Portfolio drop down menu.

Activity Form Format

Activity forms are available in two formats:

Word version: When opened in Word, you will be able to move the cursor from cell to cell to enter information. The cell will expand as you type. Handwritten entries in these cells are not accepted.

Once completed, print out the form and by hand complete the Credits this page, Portfolio Page, and if required the signer's information and signature.

PDF version: Intended to be printed out as a blank form and then completed by hand. The entries must be legible.

Signatures on Activity Forms

Where applicable, once completed the activity form must be reviewed and signed by the person(s) indicated on the form. You may not sign your own activity form even if you hold the position indicated.

Activity Form/Supporting Document Dates

The preferred format is to write out the month; e.g. 1 June 2013 or March 1, 2013. The format for numerical dates on the activity forms will be dd/mm/yyyy. 01/09/13 will be interpreted as 1st September 2013, not January 9th 2013. If you enclose documents in your portfolio where the date is ambiguous, you should indicate the month by writing d/m/y, m/d/y, or write out the actual month near the date.

CTFN No.

It is a unique 10 digit number that CDECB uses to identify you. Your CTFN No. can be found on the lower left hand corner of your CDE[®] certificate.

Updated Forms

From time to time CDECB updates the activity forms.

You DO NOT have to copy information from an already completed form onto a newer version.

Only the most recent version of the activity forms will be available from CDECB.

You may use any version of an activity form issued during your Credit Collection Period.

Starting with the 2015 How to Guide, all activity forms will indicate the year they are issued; e.g. Issued: 2015.

Credit Type Definitions

This guide refers to three types of credits: required, submitted and accepted. They are interrelated and it is important to understand the meaning of each.

Required Credits refers to the Accepted Credit threshold for successful CM by CP. CDE[®]s are successful at Certification Maintenance by Credit Portfolio once the Certification Committee has accepted **250** credits from their portfolio.

Submitted Credits refers to the credits that you indicate on your Credit Summary form and the credits documented in your portfolio. There is no limit on the number of credits you can submit.

Accepted Credits refers to the credits that CDECB accepts from those that you have submitted. There are limits to the credits we accept from each activity/category. Please review the "Accepted Credit Limits" section below. When the sum of Accepted Credits equals or exceeds the Required Credits (250), you have achieved CM. Both your Credit Summary and portfolio must have enough accepted credits to reach the Required Credit threshold.

Your portfolio must match and support the credits you indicated on your credit summary form. The credit summary and portfolio will be compared. In the case of a major discrepancy, CDECB may only accept the lowest Accepted Credits from either your Credit Summary form or documented in your portfolio towards your CM.

Submitted Credit Limits

You are allowed to submit as many credits as you wish in each activity. Submitting more credits than the accepted credit limit allows for a reserve should some credits not be accepted. **Do not limit** your Submitted Credits to the categories' accepted credit limit if you have more. CDECB will apply this limit upon review of your credit summary and portfolio as applicable.

Accepted Credit Limits

To ensure diversity in the activities used for certification maintenance there are limits to the number of credits we will accept.

With the exception of category 1, **no more than 50% of the required credits will be accepted from any one of the other five categories.** Therefore, a maximum of 125 credits from categories two through six can be applied towards the 250 required credit threshold for CM. This limit ensures that candidates **submit credits using at least two activity categories.**

The accepted credit limit for category 1 is between 75 and 100 depending on the activity forms used. This is due to forms 1B and 3A being combined into one form; form 1C.

For any Credit Collection Year we accept credit from one form 1B (10 credits) and a corresponding form 3A (5 credits) OR one form 1C (15 credits).

Once we have completed the transition to using only form 1C, the accepted credit limit for category 1 will be 100.

Activities 1A, 1B, 1C, 3A, 4H, and 5F have limits on the number of credits that we accept per Credit Collection year.

Table 2 summarizes these limits and those that apply to activities 4B, 5D, 5G, 5H, 6A and 6B.

Table 2: Accepted Credit Limits

Activity	Accepted Credit Limit per Activity	Accepted Credit Limit per Category
1A	5 Credits per Credit Collection Year	75 -100 [†]
1B	10 Credits per Credit Collection Year [†]	
1C	15 Credits per Credit Collection Year [†]	
2A	Various, activity dependent	125
2B	10 Credits per course completed	
3A	5 Credits per Credit Collection Year for completing all the activities in 1B [†]	125
3B	Various, activity dependent	
4A	15 credits per resource developed and evaluated	125
4B	15 credits for each <u>type</u> of preceptorship program Each type may only be counted once in a Credit Collection Period.	
4C	15 credits per program developed or revised	
4D	15 credits per program developed and evaluated	
4E	5 credits per presentation or teaching	
4F	10 credits per professional conference presentation	
4G	10 credits per course or year of tutoring	
4H	5 credits per Credit Collection Year	
5A	15 credits per publication	
5B	Various, activity dependent	
5C	20 credits per publication	
5D	20 credits per proposal. A proposal may only receive credit once in a Credit Collection Period	
5E (i, ii, iii)	15 credits per project or policy	
5F	10 credits per Credit Collection Year	
5G	20 credits per project per Credit Collection Period	
5H	20 credits per program evaluated per Credit Collection Period	
5I	5 credits per external review performed	
6A	20 credits per group per Credit Collection Year as long as a different outcome can be shown for each year.	125
6B	10 credits per group per Credit Collection Year	

[†] For any Credit Collection Year we accept one form 1B (10 credits) and a corresponding form 3A (5 credits) **OR** one form 1C (15 credits) for a maximum of 15 Accepted Credits per Credit Collection Year.

Applying for Certification Maintenance by Credit Portfolio

Preparing your Portfolio for Submission

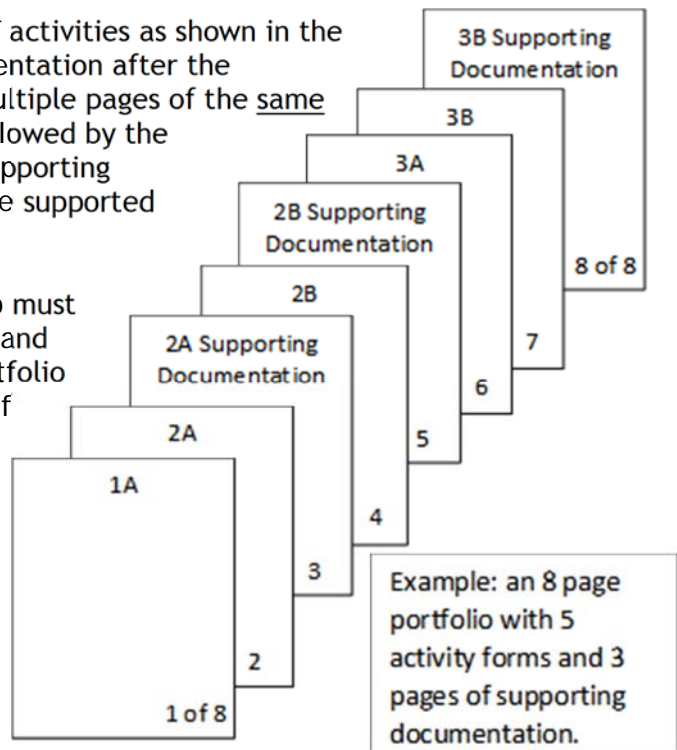
As the final step in building your portfolio, you are required to prepare your portfolio for submission. This will be your original portfolio which you will copy.

Check that your portfolio includes all completed activity forms and any supporting documentation for the credits you are submitting.

Your portfolio must be collated in the order of activities as shown in the How to Guide. Please place supporting documentation after the corresponding activity form. In the case of multiple pages of the same activity form, the activity forms come first followed by the supporting documentation for that activity. Supporting documentation should be in the same order the supported items are listed on the activity forms.

Once organized, all the pages of your portfolio must be numbered sequentially on the lower right hand corner. The total number of pages of your portfolio must be indicated on the first and last pages of your portfolio.

This will help us in several ways. It will help ensure that your portfolio remains intact during handling. The auditors will be able to confirm that they have received all the pages of your portfolio. The auditors will also have a page number to refer to when discussing your portfolio.



You may also benefit by being able to ensure that copies of your portfolio are complete.

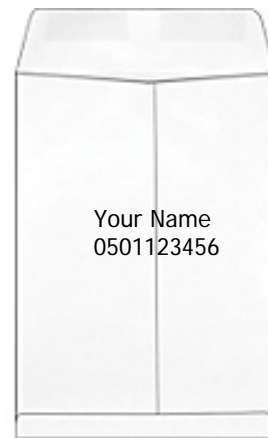
Submitted Portfolio Requirements

Make a copy of your portfolio. You may print on both sides of a sheet of paper (duplex printing). Submit only the copy of your portfolio, keep your original portfolio.

Please check that your copy is complete. We will not contact you to supplement your portfolio.

To keep your portfolio together we suggest you:

- Place the copy into a Duo-Tang,
- Use a binder clip to keep the copy together,
- Place the copy into an envelope with your name and CTFN No. on the outside



Please keep things simple. Do not;

- Separate your portfolio into sections by using dividers or sleeves:



February 1st Application Deadline

It is your responsibility to know when your CDE® designation expires. This date is found on the bottom left corner of your CDE® certificate. CDECB makes its best effort to mail out reminders however the responsibility falls upon you, the CDE®, to know when your designation expires.

The deadline to complete your online application form and credit summary form and send 1 paper copy of your portfolio and a second copy on a USB stick in PDF format or on paper is February 1st of the year you elect to perform CM. Portfolios postmarked after February 1st will not be accepted and will be returned, without exception.

Mailing Address

Certification Maintenance by Credit Portfolio
Canadian Diabetes Educator Certification Board
13909 Hurontario Street
Inglewood (Caledon), Ontario, L7C 2C9

You are strongly urged to use registered/express mail or courier to send in your portfolio. Should your documents go astray this will be your proof that you sent it in on time. Your documents must be post marked/in the courier's possession by February 1st.

Electronic Submission

CDE®s applying for CM by CP in 2018 will be required to complete their Application and Credit Summary forms online (www.cdec.ca).

You will also be required to upload the following:

- (a) Copy of your professional registration/licence
- (b) Copy of your signature
- (c) Copy of your Government issued photo identification

Upload Hint: Scan and store your documents on your local computer. Label them with your name and the document (example: First Last_signature). If obtaining a licence from URL (website) you will need to store it on your local computer as a document. CDECB does not accept links to a URL (website).

In order to proceed with your application you will be required to upload the documents. If you do not upload the documents, your application will not transmit to CDECB. Once the online portion of your application and Visa/Mastercard payment is successfully completed, an email receipt will be sent to the email address provided.

At this time, we will not be accepting portfolios online. You must send your 2 copies of your portfolio to CDECB POSTMARKED NO LATER THAN FEBRUARY 1ST, 2018

Acknowledgement of Receipt of Portfolio

To confirm that CDECB has received your portfolio by the deadline we suggest you use Courier or Express/Registered Mail. Retain the mail/courier receipts as proof of on time submission.

CDECB cannot confirm receipt of any portfolio until it is processed. Portfolios are processed in order received and timing depends upon volume.

CDECB will send out an acknowledgement of receipt of the portfolio and a receipt for fees paid by regular mail or e-mail at the address provided. This will not occur until mid-March.

Fees

Your application will not be processed until your Certification Maintenance by Credit Portfolio fee and any other applicable fee(s) are paid. If you do not pay your fee(s) by February 1st, we will assume that you have elected not to perform CM.

Result Notification

You will be notified of your CM result by mail. The CDECB office releases the results of all those who applied for CDE® certification (initial by Exam, CM by Exam and CM by Credit Portfolio) at the same time, usually in early July. We cannot confirm the result of any CM by CP by e-mail or phone.

Successful Candidates

If you are a successful candidate you can continue to use the CDE® designation until the expiration date on your new certificate. The name on the certificate will be printed exactly as your name appears on your professional accreditation. There is a fee for issuing a duplicate certificate or one in a different name from that on your professional accreditation.

Unsuccessful Candidates

If you are an unsuccessful candidate you will receive a report on your portfolio with your notification letter. You will no longer be able to use the Certified Diabetes Educator credential after the expiration date of your current certificate.

If you were unsuccessful at CM by CP there is no option to write the CDECB Exam for CM in the same year.

Regaining CDE® Certification

You may elect to apply for certification as a Certified Diabetes Educator by meeting all of the requirements for initial certification and passing the exam. Certification Maintenance will not be an option as you will not have a current CDE® designation.

Appealing the Results of Certification Maintenance

The results of the Certification Maintenance cannot be appealed. Appeals can only be made based on irregularities in the Certification Maintenance process, within 30 calendar days of notification of CM results. You must send in a letter detailing the nature of the appeal along with the appeal fee to CDECB. The fee will be refunded if the appeal is successful. CDECB will acknowledge the appeal within 15 calendar days of its receipt. A complete description of the appeal process will accompany the acknowledgement letter.

Revocation of Certification

Certification will be revoked for any of the following:

- Falsification of any information.
- Revocation, suspension or other disciplinary action by the individual's professional regulatory body.
- Proven unethical practice of diabetes education.
- Utilizing credits obtained by a person other than oneself.

CM by CP Survey

In order to gather your feedback on the CM by CP process you may receive an e-mail invitation to complete an online survey. All replies are anonymous.

Your responses and comments allow us to address your concerns and identify issues.

Questions

cpquestions@cdec.ca

Between June 1st and January 31st, the volunteers of the Credit Portfolio Committee are available to answer CDE®'s questions regarding the Certification Maintenance by Credit Portfolio process such as:

- Questions regarding the activity forms.
- Whether an activity can be claimed for credit.

Submit any questions you may have by December 1st to guarantee a response before the application deadline.

Before sending a question, please review the following:

- The How to Guide
- The FAQs on our website

Please limit each email to one or two questions regarding a particular subject. Be concise and if required, attach examples. Replies will be based upon the current How to Guide unless the question specifies another How to Guide is being used e.g. "I'm using a 2012 How to Guide...."

An autoreply message is sent as soon as we receive your email on our server (cpquestions@cdec.ca). If you don't see this reply in your email, please check you junk email.

Our response time to answer you will depend on your question, our volume of emails, holiday periods, etc.

Questions relating to the CM by CP process may also be faxed to the CDECB office fax number (next page).

General Inquiries, Administration and Initial Certification

For inquiries regarding your file with CDECB such as:

- Change of personal information; e.g. change of address, phone number
- Your CDE® Certificate
- Fees and payments
- Your online account

and initial certification or certification maintenance by CDECB exam please contact the CDECB office.

cdecb@cdecb.ca

Coordinator, CDECB
13909 Hurontario Street
Inglewood (Caledon),
Ontario, L7C 2C9

Phone: 905-838-4898
FAX: 905-838-4899

Part 2

Categories of Activities

The professional activities you may document for credit have been divided into six categories.

1. Practice Review and Self-Assessment.
2. Organized Learning.
3. Personally Designed Learning.
4. Educational/Developmental or Teaching.
5. Publications, Research and Quality Improvement.
6. Professional Leadership.

While you must collect credits from at least 2 categories, you do **not** need to collect credits in each category. Part 2 of this guide provides a detailed description of the activities within the six categories.

Using the Professional Development Activities for Credit

In this section a detailed description of the activities within each of the six categories is provided. The description provides the following information:

- A definition and description of the activity including brief examples.
- Criteria for each activity.
- Any supporting documentation which you must include in your portfolio.
- Number of credits for the activity.
- A sample form completed for each activity.

As there are a wide variety of potential activities, please read this section over carefully to become familiar with the organization of the professional development activities. The variety of activities were selected to recognize the diversity of learning and professional activities that CDE[®]s, in all parts of the country, in different professions and with different opportunities may engage in as part of their professional life. Take note of the required documentation and signatures that a CDE[®] must keep in a portfolio. For some activities a signature of a manager is required. Although it is possible to have the activity signed off by another CDE[®], preference is given for a manager's signature.

CDECB regularly reviews the activities eligible for credit, taking into consideration feedback from CDE[®]s. Please e-mail the Credit Portfolio Committee to make a request to include an activity not yet listed. cpquestions@cdec.ca

Eligibility of Activities for Credit

Professional development activities listed in this How to Guide that either **enhance competency** or **demonstrate professional leadership** can be used to earn credits. The current list of CDE® competencies can be found on our website at www.cdec.ca.

Some activities performed by CDE®s are not eligible for credit. The following list contains examples of activities that will **not** receive credit:

- Education provided directly to people with diabetes, families, those at-risk to develop diabetes, no matter where the education is provided - hospital, community centre, home, community location or diabetes summer camp. These activities are considered part of your working life, not professional development or learning.
- Public events such as health fairs, community fairs, diabetes fairs or picnics, pharmacy fairs or displays, health promotion presentations in schools or similar venues where basic diabetes information is presented/reviewed.

Use the activity assessment guide on the next page to help you assess your activities and their potential for credit.

Activity Assessment Guide

Read over all the approved activities a few times to become familiar with the broad categories and the specific activities in each one.



Consider your own activities at present and ones you may be able to do in the future to gain more credits.



If you are unsure about whether or not an activity will receive credit, use the following questions to help you decide.



1. Does the activity involve diabetes education for people with or 'at risk' to develop diabetes or their families?

NO —————→

YES —————→ Diabetes education with clients/patients/families is not eligible for credit

2. Ask yourself, "Have I been exposed to new learning in this activity?"

YES —————→

NO —————→ Not eligible for credit unless there has been or will be the potential for new learning

3. Ask yourself, "Will participation in this activity help me enhance my competency in one or more of the CDE® competencies, or does it represent professional leadership?"

YES —————→

NO —————→ Activities for credit need to enhance competency or demonstrate professional leadership, so this likely would not get credit

This activity will likely qualify for credit. To further confirm this, consider the required documentation and signature(s) for evidence of accomplishment.

CDE® Competencies

On activity forms that require it, you must indicate 1 to 3 CDE® competencies satisfied by your professional development activity.

Visit www.cdec.ca for the updated 2018 CDE® competencies

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What should I do if I am still unsure?

If you are unsure how to categorize a professional development activity for credit please contact us at cpquestions@cdec.ca . Be as concise as possible with your situation. You will be asked to include a copy of any decision from cpquestions@cdec.ca in your portfolio.

Please review the “Questions” section of the How to Guide prior to sending a question.

Submit any questions you may have by December 1st to guarantee a response before the application deadline.

Please note that questions will not be answered between February 1st and May 31st.

IMPORTANT NOTE REGARDING the SAMPLE FORMS

The Sample Forms are only intended to guide you in completing your forms. In order to cover as many situations as possible, some Sample Forms are completed with all the possible options.

As you perform Professional Development activities, you will document the credits earned by completing the appropriate sections of the form for that activity.

You **SHOULD NOT** be attempting to perform specific activities in order to match the Sample Forms.

Sample forms are enclosed in this border

Category 1 - Practice Review/Self-Assessment Activities

1A: External Review of CDE® Practice

This is a formal process of external review of the clinical practice of a CDE®. The review may include one or more of the following:

- Observation of the CDE® in his/her practice.
- Chart reviews
- Performance appraisal by Manager/Supervisor or someone familiar with the CDE®'s practice.

Criteria:

- The CDE® competencies **must** be considered in the review.
- The audit/review must be done by someone other than the CDE®.

Required Documentation: 1A	Credits Obtained
Form 1A signed by reviewer - see sample form on next page. You must use one form per Credit Collection Year and clearly indicate the Credit Collection Year for which you are claiming credit.	5 credits per Credit Collection Year Maximum 25 credits per Credit Collection Period

Form 1A: External Review of CDE® Practice

5 Credits per Credit Collection Year

Issued: 20XX

NAME: Jennifer Brown
CTFN No.: 0000009999

Sample Form

Criteria:

- The CDE® competencies must be considered in the review.
- The audit/review must be done by someone other than the CDE®.

The audit/review may include one or more of the following:

- Observation of practice.
- A chart audit.
- A performance appraisal by employer.

-All fields below must be completed for credit. -

Credit Collection Year: 2013

List 1 to 3 CDE® Competencies Satisfied During Review: 2B, 2D

Date of External Review of Practice (dd/mm/yy): 13/07/2013

Signature of reviewer: S. Black

Name (please print): S. Black

Position: Manager, Diabetes Program

Relationship to CDE®: Manager

Portfolio Page:

**1B:Self-Assessment
of Learning Needs**

Form 1B has been replaced by form 1C part A.

If you are about to document a new Self-Assessment of Learning Need please use form 1C. Part B of form 1C replaces form 3A used to report on your self-study.

IMPORTANT:

If you have completed 1B forms and corresponding 3A forms for previous Credit Collection Years, you do not need to transfer the information onto form 1C.

The Credit Summary form will continue to have an area to submit form 1B and form 3A credits.

For any Credit Collection Year we accept credit from one form 1B (10 credits) and a corresponding form 3A (5 credits) **OR** one form 1C (15 credits).

Use of form 1C is mandatory for those who attained their current CDE® certificate on or after February 1st, 2013.

1C:Self-Assessment of a Learning Need/ Report on Self-Study Plan

Use of form 1C is mandatory for those who attained their current CDE® certificate on or after February 1st, 2013.

Indicate the Credit Collection Year covered. For any Credit Collection Year we accept credit from one form 1C (15 credits) **OR** one form 1B (10 credits) and a corresponding form 3A (5 credits).

Part A: Self-Assessment of a Learning Need and outline of Self-Study Plan

This is a formal process of self-assessment of a learning need and an outline of a self-study plan completed by the CDE®. The Self-Assessment of a Learning Need and outline of a Self-Study Plan may be done annually by the CDE® and signed by their Manager or, if the manager is unavailable, another CDE® familiar with the CDE®'s practice. Part A is equivalent to form 1B.

Identifying a Learning Need

The learning need must be different for each credit collection year and may only be used once during a credit collection period (5 years).

To determine a learning need consider:

- The CDE® competencies for diabetes education - are there gaps in your knowledge or skill level?
- Controversies/clinical issues or problems in your professional practice or feedback from an external review of practice (form 1A).
- Your desire for more information, understanding from reading, discussion with colleagues, attendance at an educational event.

Part B: Report on Self-Study Plan developed in Part A.

Part B is equivalent to form 3A.

You may also use the activities performed to complete your self-study plan for credit in other categories. The activity must meet the stated criteria for the other category.

Criteria:

- Must consider the CDE® competencies. Refer to the CDE® competencies section of the How to Guide.
- Must use form 1C provided by CDECB - see sample on the next page.
- Self-Assessment **must** include a self-study plan with:
 - **1 to 3 CDE® competencies related to the identified learning need.**
 - a description of how the learning need relates to your professional practice.
 - Learning objective
 - Planned learning method and activities
- You must demonstrate successful completion of the self-study plan.

Required Documentation: 1C	Credits Obtained
<p>Completed Form 1C;</p> <p>Part A: signed by your Manager or, if the manager is unavailable, by another CDE® who is familiar with your practice. 1 to 3 CDE® Competencies must be indicated with a description of how the learning need relates to your professional practice. Learning needs must be different for each Credit Collection Year and can be only used once in a Credit Collection Period (5 year).</p> <p>Part B: Completed Report on Self-Study Plan with completion date.</p> <p>One learning need per Credit Collection Year. You must use a different form for each Credit Collection Year and clearly indicate the year for which you are claiming credit.</p> <p>For any Credit Collection Year we accept credit from one form 1C (15 credits) OR one form 1B (10 credits) and a corresponding form 3A (5 credits).</p>	<p>15 credits per Credit Collection Year when both part A and part B are completed.</p>

Form 1C: Self-Assessment of a Learning Need/Report on Self-Study Plan

15 Credits per Credit Collection Year when both parts are completed Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000009999

Part A: Self-Assessment of a Learning Need and Outline of a Self-Study Plan

Sample Form

The Self-Assessment of a Learning Need and outline of a Self-Study Plan may be done annually by the CDE® and signed by their Manager or, if the manager is unavailable, another CDE® familiar with the CDE®'s practice.

Credit Collection Year: 2014

LEARNING NEED	1 to 3 Related CDE® Competencies/Description
<i>What is schizophrenia? What learning methods are best with these clients? How are others working with them?</i>	<i>CDE® competency #4K Now have more clients in my practice being diagnosed with schizophrenia, some pre-diabetes and some with diabetes.</i>

How do you plan to address your learning need? Tick as many learning methods that apply and add others as needed.

Audio/video		Reading articles	✓
Continuing education event		Discussion with colleagues	✓
Organized clinical learning experience		Planned literature search and summary	
Internet search	✓		

How will you use this knowledge in your practice?

*I will be able to communicate more effectively with clients who have schizophrenia and diabetes.
Able to develop a teaching guide for clients with schizophrenia and diabetes.
Have a better understanding of clients with these conditions.*

Manager's Name: (print) <i>S. Blackstone</i>	Manager's Signature: <i>S Blackstone</i>
--	--

OR ANOTHER CDE® MAY SIGN ONLY IF A MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:	Name: (print)	Signature:
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Date Signed: 21/11/2014

For credit, Part B on next page must also be completed.

Portfolio Page:

Form 1C: Self-Assessment of a Learning Need/Report on Self-Study Plan

15 Credits per Credit Collection Year when both parts are completed Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000009999

Sample Form

Part B: Report on Self-Study Plan

Date completed: 12 December 2014

Indicate learning method(s) used to satisfy learning need

Audio/video		Organized clinical learning experience		Internet search	✓
Continuing education event		Planned literature search and summary		Discussion with colleagues	✓
Reading articles	✓				

Summary of learning

Spoke with diabetes educator in North Shore who has experience with these clients. Obtained information on various teaching methods which could be useful when dealing with clients who have schizophrenia and combined that with reading and I developed a plan for follow-up and working with local community mental services.

How will you use this knowledge in your practice?

These clients will get better care as I have a better understanding of their condition, have an organized follow-up plan and have started to work with local mental health services.

You may claim credit for this activity only once you have completed Part A and Part B. For any Credit Collection Year we accept credit from one form 1C (15 credits) **OR** one form 1B (10 credits) and a corresponding form 3A (5 credits).

Portfolio Page:

Category 2 - Organized Learning Activities

2A: Short Term Learning Events

A variety of learning events are available for credit in this category. Examples include:

- Conferences
- Seminars
- Programs
- Study group or Journal club
- Telehealth or Telemedicine
- DC Professional Section Chapters sponsored education events
- DC Leadership forum, diabetes related sessions only (**not business meeting time**)
- Short courses such as insulin pump training programs
- Industry sponsored education events. **Note: For events completed after January 1st 2014: No credit will be given for a session that teaches basic operation of blood glucose meters and insulin pens. To receive credit the activity must contain learning of a teaching tool that accompanies the device such as pattern management or insulin adjustment.**
- Workshops
- Lectures
- Webcasts/webinars
- *Rounds
- Inservices

Sponsors for these events may include: DC, ADA, AADE, college or university, health care institution or community agency, professional association or industry.

* General Ward Rounds are not accepted.

Criteria:

- Must provide new learning for the CDE®.
- Learning event must have direct relevance to diabetes education, care or treatment and be related to a CDE® competency.

For each activity documented on form 2A you must indicate 1 to 3 CDE® competencies. Learning events that are longer than 4 hours require supporting documentation.

For web based activities do not cite the portal, such as a search engine. You must cite the actual event provider.

There are four subcategories;

- Learning events of 4 hours or less
- Learning events of more than 4 hours duration including non-diabetes specific Conferences. (excludes Short Courses, Diabetes Specific Conferences)
- Diabetes Specific Conferences; e.g. IDF, DC, EASD, ADA, AADE, Diabète Québec.
- Short Courses

Learning events of 4 hours or less:

Activity Form and Supporting Documentation	Credits Obtained
Form 2A: Short Term Learning Events No supporting documentation required	1 credit per hour, Ex: if you attend a 3-hour diabetes workshop, you obtain 3 credits. If the event length includes part of an hour, round up to the next full credit. For example 1.5 hours would be counted as 2 credits. Event must be at least 30 minutes

Learning events of more than 4 hours duration including non-diabetes specific Conferences*: (excludes Short Courses, Diabetes Specific Conferences)

Activity Form and Supporting Documentation	Credits Obtained
Form 2A: Short Term Learning Events Required supporting documentation: <ul style="list-style-type: none"> • An agenda and, • An attendance certificate (signed and dated) Registration receipts alone are not adequate documentation. *Only sessions that are diabetes related and can be related to the CDE® competencies may be claimed for credit. Sessions attended must be indicated.	Without both an agenda and an attendance certificate, you can only claim <u>4 credits</u> for the <u>whole event/workshop/conference</u> . With both an agenda and an attendance certificate, for sessions that are diabetes related and can be related to the CDE® competencies 1 credit per hour or part of an hour. Each day, regardless of the number of activities attended <u>no more</u> than six credits can be counted. No matter the number of activities or length, the maximum credit for any one event/ workshop/conference is 18 credits.
Credits for diabetes specific pre-conference workshops:	
Activity Form and Supporting Documentation	Credits Obtained
Form 2A: Short Term Learning Events No supporting documentation required.	Workshop must be diabetes related; <ul style="list-style-type: none"> • ½ day - 2 credits • full day - 4 credits You may not claim more than 4 credits for the pre-conference day

Diabetes Specific Conferences; e.g. IDF, DC, EASD, ADA, AADE, Diabète Québec

Activity Form and Supporting Documentation	Credits Obtained
<p>Form 2A: Short Term Learning Events</p> <p>Required supporting documentation:</p> <ul style="list-style-type: none"> An attendance certificate (signed and dated) <p>Registration receipts alone are not adequate documentation.</p>	<p>Without an attendance certificate, you can only claim <u>4 credits</u> for the <u>whole conference</u>.</p> <p>With an attendance certificate;</p> <p>1 credit per hour or part of an hour for each session.</p> <p>Each day, regardless of the number of activities attended <u>no more</u> than six credits can be counted.</p> <p>For a 2 day conference you can claim <u>12 credits</u> for the <u>whole conference</u> as a single item.</p> <p>For a 3 day conference you can claim <u>18 credits</u> for the <u>whole conference</u> as a single item.</p> <p>No matter the number of activities or length, the maximum credit for a conference is 18 credits.</p>
Credits for the pre-conference workshops:	
Activity Form and Supporting Documentation	Credits Obtained
<p>Form 2A: Short Term Learning Events</p> <p>No supporting documentation required.</p>	<ul style="list-style-type: none"> ½ day - 2 credits full day - 4 credits <p>You may not claim more than 4 credits for the pre-conference day</p>

AADE Virtual Conference

Activity Form and Supporting Documentation	Credits Obtained
<p>Form 2A: Short Term Learning Events</p> <p>AADE Statement of Credit showing contact hours for each session.</p>	<p>1 credit for 1 contact hour e.g. 2.5 credits for 2.5 contact hours.</p> <p>No credit limit per day/conference.</p>

Short Courses:

In general, a Short Course is a learning event that;

- is not part of a formal academic program (see 2B)
- has a single theme or topic focus related to diabetes, and
- is 1 day or longer in length.

Examples include:

- Short self-study courses often provided online, must be diabetes related.
 - ContinuingEducation.com
 - Stanford University Leader Training Courses
 - Choices and Change
 - Craving Change Facilitator Training
 - Health Coaching
- Insulin Pump Training; Continuous Glucose Monitoring System Training

Supplier	Pump	CGM System
Medtronic	MiniMed® Veo™	MiniLink transmitter, Enlite glucose sensor; iPro2
Animas	One Touch Ping	-
	Vibe	Dexcom G4 Platinum CGM system
Omnipod	The Pod/Personal Diabetes Manager	-
Roche	Accu-Chek Spirit insulin pump <u>or</u> Combo System (consider as one pump)	-

Note: CGM training is independent of pump training, e.g. you may claim credit for Dexcom CGM system training whether or not you received training on the Vibe pump.

For each pump listed, you may claim credit once during your current Credit Collection period for;

- Initial training and certification on the insulin pump.
- A workshop on advanced pump features.

For each CGM listed, you may claim credit once during your current Credit Collection period for;

- Initial training and certification on the continuous glucose monitoring system.
- A workshop on interpreting CGM reports.

NOTE: *If you are uncertain if a course qualifies in this category please contact the Credit Portfolio Committee at cpquestions@cdec.ca. Provide details such as a course outline or a website.*

Activity Form and Supporting Documentation	Credits Obtained
Form 2A: Short Term Learning Events - Short Courses Required supporting documentation: <ul style="list-style-type: none"> • Certificate of Attendance and/or Certificate of Completion 	5 credits Each Short-Course may be counted only once in a Credit Collection Period (5 years).

Sample Form

Form 2A: Short Term Learning Events

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000009999

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Item	Date	Name of Event and Organization or Sponsor	1 to 3 CDE® Competencies	SUPPORTING DOCUMENTATION IN PORTFOLIO			
				Topic	Length	Credits	
1	Feb 21 2014	Telehealth presentation Sponsor: NovoNordisk	3.1 A-D	Initiation of Insulin Therapy	2.5 hrs	3	<input type="checkbox"/>
2	Mar 11 2014	DES Annual Workshop Sponsor: DES Chapter	3.3 A	Physical Activity and Type 2 Diabetes	7 hrs	6	<input checked="" type="checkbox"/>
3	23/01 2015	Webcast - from CDA professional conference	2.B	Mindless Eating: Why We Eat More Than We Think	1 hr	1	<input type="checkbox"/>
4	Oct 26, 2016	Pre-Conference Workshop A CDA/CSEM Professional Conference Ottawa 2016	2.A 6.B	Dishing Up for Diabetes: The Evaluation and Use of an Interactive Food Demonstration in Basic Group Diabetes Education	Half day	2	<input type="checkbox"/>
5	Oct 27-29, 2016	CDA/CSEM Professional Conference Ottawa 2016	3.1.B 3.3.A	Multiple topics	3 days	18	<input checked="" type="checkbox"/>
6	Sept 3 2017	Pattern management Sponsor: Lifescan	3.5 A 3.5 E	Learning tools of Pattern management accompanying Verio Meter	1hr	1	<input type="checkbox"/>
7	Nov 16 2017	Lunch-n-learn with Study Group	1.F, 2.D, 3.3A	Inflammation, CVD and Diabetes	1hr	1	<input type="checkbox"/>

Portfolio Page:

- Items 1 and 3; 1 credit per hour rounded up. Less than 4 hours duration, no supporting documentation required.
- Items 2 and 5; 1 credit per hour rounded up. Maximum 6 credits per day. Over 4 hours per day requires supporting documentation. No workshop/conference will be more than 18 credits no matter the length.
- Item 6; 1 credit per hour. It is learning of teaching tool, not just learning operations of meter.
- These are examples. You DO NOT have to have all these event types. Any combination of properly documented and valid events is permitted.

Sample Form

Form 2A: Short Term Learning Events - Short Courses

Issued: 20XX

5 Credits per Short Course with Documentation

NAME: Jennifer Brown CTFN No.: 0000009999

Credits this Page	10
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#	Date	Name of Event and Organization or Sponsor	1 to 3 CDE® Competencies	SUPPORTING DOCUMENTATION IN PORTFOLIO		
				Topic	Credits	
1	<i>February 16, 2014</i>	<i>Animas pump certification - Animas Canada</i>	<i>3.1.D</i>	<i>Advanced pump training, level 1</i>	5	<input checked="" type="checkbox"/>
2	<i>April 10-11, 2015</i>	<i>Health Coaching - Institute for Optimizing Health Outcomes</i>	<i>4B, 4M</i>	<i>Health Coaching workshop</i>	5	<input checked="" type="checkbox"/>
3						<input type="checkbox"/>
4						<input type="checkbox"/>
5						<input type="checkbox"/>
15						<input type="checkbox"/>

Portfolio Page:

2B: Formal Courses

Courses may be either academic or non-academic.

Examples of academic courses are those taken through a recognized academic institution (university or college) or professional institution and may include courses such as:

- Adult education
- Research design
- Critical appraisal
- Pharmacology
- Diabetes Education courses such as those provided by The Michener Institute (Toronto); Northern Diabetes Health Network at Cambrian College (Sudbury) or Confederation College (Thunder Bay); SIAST (Saskatchewan)

Example of non-academic courses:

- The DC self-study manuals;
 - Building Competency in Diabetes Education: The Essentials (2013) and,
 - Building Competency in Diabetes Education: Advancing Practice (2010).

Note: If you do not have a certificate of completion you may elect to claim reading each of these manuals a book (activity 3B). *Past editions will be accepted as long as completed within the five year credit collection period*

Criteria: Courses **must**;

- Be related to the CDE® competencies.
- Have project work, papers or examination requirements.

Required Documentation: 2B	Credits Obtained
<p>Document courses taken on Form 2B</p> <p>Required supporting documentation:</p> <p>For Building Competency in Diabetes Education: The Essentials and Building Competency in Diabetes Education: Advancing Practice <u>ONLY</u>:</p> <ul style="list-style-type: none"> • The certificate of completion you received for passing the exam. <p>All other courses;</p> <ul style="list-style-type: none"> • Documentation of successful completion of course (official transcript of marks, certificate) and, • An outline and/or syllabus of the course. <p>NOTE: <i>If you are uncertain if a course qualifies in this category, e-mail cpquestions@cdec.ca or fax 905 838 4899 and provide course details and a website if possible.</i></p>	<p>10 credits per course completed.</p>

Form 2B: Formal Courses

10 Credits per Course Completed. Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000009999

Sample Form

Date Completed: <i>December 2013</i>	
Institution or Organization: <i>CDA</i>	
Name of Course or Module: <i>Building Competency in Diabetes Ed</i>	
List 1 to 3 CDE® Competencies Related to the Course: <i>1-6</i>	
The Course had (CHECK ALL WHICH APPLY)	<input type="checkbox"/> PAPER
	<input checked="" type="checkbox"/> EXAM
<input type="checkbox"/> PROJECT : List title of Project(s)	
Required supporting documents in portfolio;	An official transcript of marks, certificate <input checked="" type="checkbox"/> and, An outline and/or syllabus of the course. <input type="checkbox"/>

Portfolio Page:

Category 3 - Personally Designed Learning Activities

3A: Report of Self-Study Plan Developed in 1B

Form 3A has been replaced by form 1C part B.

If you are about to complete a Report of Self-Study Plan to complement a completed form 1B, you may still use form 3A. The form can be downloaded from the CDECB website.

New Self-Assessment of a Learning Need/ Report on Self-Study activities must be done on form 1C.

IMPORTANT:

If you have completed 1B forms and corresponding 3A forms for previous Credit Collection Years, you do not need to transfer the information onto form 1C.

The Credit Summary form will continue to have an area to submit form 1B and form 3A credits.

For any Credit Collection Year we accept credit from one form 1B (10 credits) and a corresponding form 3A (5 credits) OR one form 1C (15 credits).

Use of form 1C is mandatory for those who attained their current CDE® certificate on or after February 1st, 2013.

3B: Self-Study - Through Reading

Self-study through journal articles, books and internet reading may be claimed for credit.

Criteria:

- All self-study must be new learning for the CDE®.
- The new learning must be diabetes related. If you are unsure, review the CDE® competencies.
- For each item indicate 1 to 3 CDE® competencies satisfied by your new learning.

Journal Articles:

- Must be from a peer-reviewed journal to count for credit.
- Each article must be listed with 1st and 2nd authors mentioned and indicate 1 to 3 CDE® competencies.
- The year of publication does not have to be within your 5 year Credit Collection Period, but the article must have been read during your Credit Collection Period.
- For the Canadian Journal of Diabetes, only articles under the headings Original Research and Review may be claimed for credit.
- Editor's notes, letters to the editor, abstracts and newsletters cannot be claimed for credit.

The CDECB website has a table of over 300 journals. The list is in alphabetical order and, for each entry, indicates if the journal is peer-reviewed or not. This list is not all inclusive.

If you are still unsure if the journal is peer-reviewed, send a question to cpquestions@cdec.ca

- Examples of frequently read peer reviewed journals include:
 - *Canadian Journal of Diabetes*
 - *Diabetes Care*
 - *The Diabetes Educator*
- Examples of non-peer reviewed publications **not** eligible for credit include:
 - *Diabetes Dialogue*
 - *Diabetes Forecast*
 - *Canadian Diabetes*

3B: Self-study -
Through Reading
(con't)

Internet Reading:

- Internet reading may be counted for credit if the article is professional-level and equates to reading a printed professional (peer-reviewed) journal article.
- You must cite an internet journal article as if it was printed, not the webpage it was accessed from.
- Public education publications are not accepted, e.g., DC or ADA public education publications.

Continuing Medical Education (CME):

- Examples of Web based CME; MEDSCAPE, *AdvancingIN, UPTODATE, mdBriefCase™, rxBriefCase™.
*Note: Diabetes Exchange CMEs from AdvancingIN cannot be claimed for credit.
- Provider must indicate that the CME is worth at least ½ credit. CMEs that the provider indicates as being worth less than ½ credit are not accepted. CMEs are not cumulative.

Books:

- The book may be intended for either a professional or a lay person.
- A book can be claimed for credit as long as there is new learning for the CDE® and,
 - The new learning must be related to 1 to 3 CDE® competencies. New learning must be diabetes related.
 - The CDE® must describe their new learning in 1 to 2 sentences.
- Do not provide a summary of the book as your new learning.
- Cookbooks are not accepted.
- You may elect to claim The Essentials and Advancing Practice each as a book read if you do not have a certificate of completion for them.

Activity Form and Supporting Documentation.	Item	Credits Obtained
<p>3B: Self Study - Through Reading.</p> <p>No supporting documentation required</p>	Journal articles	½ credit per journal article read
	FIT Recommendations	½ credit for reading the FIT Recommendations
	<p>Reading an entire issue of <i>The Diabetes Communicator</i>.</p> <p>Do not list authors for this publication.</p>	1 credit
	<p>Reading the Canadian Journal of Diabetes Clinical Practice Guidelines (CPGs);</p>	
	<p>Prior to the release of the 2018 CPGs;</p> <ol style="list-style-type: none"> 1. The 2008 CPGs 2. The 2013 CPGs; Full Guidelines 3. The 2013 CPGs; Executive Summary 	<p>Prior to the release of the 2018 CPGs only one of the three listed CPGs may be claimed for credit in your Credit Collection period (5 years)</p>
	<p>Once the 2018 CPGs are released:</p> <ol style="list-style-type: none"> 1. The 2013 CPGs; Full Guidelines 2. The 2013 CPGs; Executive Summary 3. The 2018 CPGs; Full Guidelines 4. The 2018 CPGs; Executive Summary 	<p>Once the 2018 CPGs are released only one of the four listed CPGs may be claimed for credit in your Credit Collection period (5 years)</p>
		<p><u>For the one listed CPGs you selected</u>, count ½ credit per article to a maximum of 18.5 credits if you read it completely</p>
	Internet reading	½ credit per article read
Web based CME	½ credit per article read	

Books	
Activity Form and Supporting Documentation	Credits Obtained
<p>3B: Self-Study - Books Read</p> <p>You must write 1-2 sentences to explain your new learning related to the 1 to 3 CDE® competencies listed. <u>Do not</u> provide a summary of the book.</p> <p>No supporting documentation required.</p>	4 credits per book read

Sample Form

Form 3B: Self-Study - Through Reading

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

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Author (1 st and 2 nd)	Journal Name or Internet CME Site	1 to 3 CDE® Competencies		Credits
		Articles: Title, Vol. (issue), pgs. or Internet CME: Program Title	↓	
Journal Example: McManus, R Giroux, I	Canadian Journal of Diabetes	Characteristics of Women with Recent Gestational Diabetes Mellitus Attending a Postpartum Diabetes Prevention Seminar 36(2), 68-70	5.D	0.5
Internet Reading Example: CDA-CPG Expert Committee	Canadian Journal of Diabetes	CDA 2013 Clinical Practice Guidelines for the Prevention and Management of Diabetes 37(Suppl 1), S1-S196	1.A-I 2.A-I 3.1.A-I	18.5
Internet CME Example: Amish Parikh Lori Berard	Advancingin.com	Diabetes Management in the 21st Century	3.5 A 3.5 E	1/2

Even though this was accessed on the internet, it should be recorded as if it was a printed journal article.

Portfolio Page:

Sample Form

Form 3B: Self-Study - Books Read
4 Credits per Book Read

Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000009999

Credits this Page	4
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#	Author	Title	Publisher and Year of Publication	CDE Competency	1 to 3 CDE® Competencies	Credits
					YOUR NEW LEARNING from the Book 1-2 SENTENCES TO EXPLAIN YOUR NEW LEARNING RELATED TO THE CDE® COMPETENCIES.	
1	Prochaska J.O., Norcross J.C., Diclemente C.C.	Changing for Good: A Revolutionary six stage program for overcoming bad habits and moving your life positively forward	Avon Books, New York, 1994	4.M	<i>I gained a greater understanding of the theory behind the concepts for Stages of Change</i>	4
2						
3						
4						
5						
6						

Do NOT provide a summary of the book. The 1-2 sentences you provide should describe what you learned as a result of reading this book.

Portfolio Page:

Category 4 - Educational Development/Teaching Activities

Several of the activities in Category 4 are projects which are in-depth and continue over a period of time. See activities 4A, 4C, and 4D.

To be considered for credit, remember the following:

- The CDE® who is claiming credit must be involved in all aspects of the project: both the development and evaluation.
- The project must be completed before credits can be claimed.
- If a project spans two Credit Collection Periods, claim the credits in the Credit Collection Period when the project is completed.
- For all completed projects, fill in the appropriate activity form and keep in your portfolio.

4A: Development and Evaluation of New Diabetes Related Educational Materials and Resources

Included in this section are:

- Patient education teaching materials and resources developed or significantly modified and evaluated for/by employer, DC or other academic or health care institutions, including industry
- Materials developed and evaluated by DC’s National Nutrition Committee.
- Creation of websites for diabetes education (refers to the diabetes content, not the technical aspects of website development).

Examples:

- Writing a manual for parents of children newly diagnosed with diabetes.
- Development of a teaching tool for use of insulin pen.
- Working as a member of a committee developing and evaluating new nutrition resources.

NOTE: Review of materials developed by others, as a peer reviewer, is claimed for credit in 5I.

Criteria:

- The development and evaluation may be done as an individual or as part of a team of which the CDE® is a member.
- For credit, the CDE® must be involved in **all** aspects of development and evaluation of the material or resource and be able to identify his/her specific contributions.

NOTE: the evaluation must be completed to qualify for credit.

Required Documentation: 4A	Credits Obtained
<p>Completed documentation using Form 4A. The form must be signed by the Manager. If the Manager is unavailable another CDE® who is familiar with your practice may sign.</p> <p>See sample form on next page.</p>	<p>15 credits per resource developed and evaluated</p>

Form 4A: Development and Evaluation of New Diabetes Related Educational Materials and Resources

15 Credits per Resource Developed and Evaluated

Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 000000001

DATE PROJECT COMPLETED: MONTH: August YEAR: 2014

Sample Form

NOTE: The information provided should not exceed two pages.

Name or Title of Resource.

Preventing Diabetes and Living Healthy

Describe the needs assessment which led to the development of the resource.

More clients with pre-diabetes are being referred to our program. We have no handouts for them and have not been able to find ones to suit our needs. Clients are asking many questions about starting to exercise - how much, when, what type? Literature review included Finnish and American study on diabetes prevention, internet review of resources from DPP.

Describe the resource, purpose in diabetes education, development methods.

We have developed a self-assessment, planning and record-keeping tool for people with pre-diabetes who would like to increase their level of physical activity. We use the tool in a group session and then each person takes it home with them. We have one group follow-up session and ask everyone to bring back his or her booklet.

The resource was developed with help from an exercise therapist outside our community (we don't have one). Drafts were reviewed by the diabetes educators and 10 clients with pre-diabetes. We reviewed the drafts for accuracy, ease of reading and practicality of the information.

Our resource is based on CPG re physical activity, a small literature search, expert advice and input from clients. We also used the 'stages of change' to help in the design.

Describe the evaluation design for the new resource.

Pre-distribution evaluation was done as described above. Once we started to use the resource in the classes we asked for written feedback in two post-class evaluation forms: one at the end of our group session and one 6 months later. After 10 months of use, another staff member facilitated a focus group of 6 clients, to understand how the clients used the resource and its usefulness to them.

What were the results of the evaluation (provide a concise description).

Generally the results were positive. Clients found the layout easy to use. They suggested that we use it in the follow-up class to remind them of all the different features and some of the content. Some clients asked us to clarify the section on buying proper footwear and give more suggestions. We have done this.

Who worked on the development and evaluation of the resource?

Needs assessment, initial design and data collection was performed by a RD and DNE in the diabetes program. An exercise therapist reviewed the material for accuracy and made suggestions to improve the content; a staff member in the Quality Improvement Department was consulted on the evaluation design and she conducted the focus group.

What was your role in the development and evaluation of the resource?

As the diabetes nurse educator, I worked collaboratively with the dietitian and we shared all parts of the workload equally. I did most of the background research and she wrote the first draft after we had both created the outline.

Manager's
Name: (print)

S. Blackstone

Manager's
Signature:

S Blackstone

OR ANOTHER CDE® MAY SIGN ONLY IF MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:

Name:(print)

Signature:

Portfolio Page:

4B: Preceptorship of a Student or New Diabetes Educator

A formal education program of **5 days or more duration** that must include needs assessment, learning objectives and evaluation of learner by a CDE®.

Criteria:

- Preceptorship must provide the student or New Diabetes Educator with diabetes specific knowledge.
- Required documentation must include needs assessment, objectives and evaluation done by CDE® for learner.
- Each type of preceptorship program **may only be counted once in 5 years (Credit Collection Period)**
 - e.g. One preceptorship of a:
 - dietetic internship in DEC
 - nursing student
 - new diabetes educator
 - pharmacy student

NOTE: for orientations of less than 5 days to diabetes education or its services for students or health care professionals, see activity 4E.

Required Documentation: 4B	Credits Obtained
<p>Completed documentation using form 4B.</p> <p>The form must be signed by the person preceptored and the Program Director/ Manager. If the Program Director/ Manager is unavailable another CDE® who is familiar with your practice may sign.</p> <p>See sample form on next page.</p>	<p>15 credits for <u>each type</u> of preceptorship program. Each type may only be counted once in a Credit Collection Period</p>

Form 4B: Preceptorship of a Student or New Diabetes Educator

15 Credits for Each Type of Preceptorship Program

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

Sample Form

DATE: MONTH: April YEAR: 2015

NOTE: The information provided should not exceed two pages.

<p>Type , Date and Number of Days(Preceptorship of Student or Diabetes Educator)</p> <p><i>Preceptorship of new diabetes educator. 14/04/2009, 10 days</i></p>
<p>Program is diabetes related <input checked="" type="checkbox"/> yes <input type="checkbox"/> no</p>
<p>Describe the needs assessment of the student / new diabetes educator.</p> <p><i>Program is competency based. New educator does a self-assessment on knowledge, skill and attitude competencies. Discusses the assessment with precepting team (nurse/dietitian) and together they formulate the learning objectives.</i></p>
<p>Describe the learning objectives of the student / new diabetes educator.</p> <p><i>Educator was already familiar with group education processes, but had self-rated low in the diabetes specific competencies for knowledge and skill. The overall objective was to achieve the basic level competencies (attached) within the first six months of employment in DEC.</i></p>
<p>Describe the evaluation design.</p> <p><i>For each competency the new educator completes practical written activities using The Essentials and additional activities provided by our program. The educator has been assigned case studies to hand in to the precepting team. Also, the new educator is observed working with clients in specific competency areas - does a self-assessment and also gets feedback from the precepting team member. The new educator and precepting team decide together when the educator has met a competency and the evidence of accomplishment is reviewed by the Manager.</i></p>
<p>What was your role in the preceptorship with the student/new educator?</p> <p><i>Dietitian preceptor for new educator. Provided guidance on all nutrition related competencies and some of the education and psychosocial competencies. Worked collaboratively with new staff member and nurse educator.</i></p>

New Diabetes Educator/ Student

Name: (print)

Signature:

Date:

G. Bolduc	<i>G Bolduc</i>	April 30 2015
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- And -

Program Director/Manager

Name: (print)

Signature:

Date:

S. Blackstone	<i>S Blackstone</i>	April 30 2015
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OR ANOTHER CDE® MAY SIGN ONLY IF THE MANAGER/PROGRAM DIRECTOR IS UNAVAILABLE TO SIGN

CTFN No.:	Name: (print)	Signature:	Date:
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Portfolio Page:

4C: Development or Significant Revision of a Program for Preceptorship of Students or New Diabetes Educators

The development or significant revision of a formal education program of **5 days or more duration** which must include needs assessment, learning objectives and evaluation of the learner by a CDE®.

Criteria:

- The development or significant revision may be done as an individual or as part of a team.
- The CDE® must be involved in **all aspects** of development/revision and identify his/her specific contributions.
- Complete documentation is required as specified in Form 4C.

Required Documentation: 4C	Credits Obtained
<p>Completed documentation using Form 4C. The form must be signed by a Manager. If a Manager is unavailable another CDE® who is familiar with your practice may sign.</p> <p>See sample form on next page.</p>	<p>15 credits per program developed or revised.</p>

Form 4C: Development or Significant Revision of a Program for Preceptorship for Students or New Diabetes Educator

15 Credits per Program Developed or Revised.

Issued: 20XX

NAME Jennifer Brown CTFN No.: 0000000001

Sample Form

DATE PROJECT COMPLETED: MONTH: August YEAR: 2015

NOTE: The information provided should not exceed two pages.

Name of Program.

Competency-Based Diabetes Program for New Diabetes Educators

Describe the needs assessment used in the development/revision of the program.

Needs assessment included: reviewing the job description and expectation of a diabetes educator in the first year of employment in a DEC, review of client needs, focus group held with current diabetes educators with varying experience in diabetes education. CDE® competencies were also reviewed by the focus group and designated as basic, intermediate or advanced for the new employee.

Describe the learning objectives of the program as developed/revised.

At the completion of the basic program the new diabetes educator will

- *demonstrate the knowledge required in each of the competency areas including both knowledge about diabetes education and care*
- *demonstrate the skills required for each competency in both individual and group client education*
- *demonstrate the attitude competencies when working with clients individually or in groups and with diabetes educator colleagues and staff member*

Describe the program as developed/revised.

New educator completes a self-assessment and discusses with Manager and precepting nurse educator/dietitian

Together they create a program of self-study from the core program which includes reading, practical exercises, observation of precepting educators and support client education opportunities with feedback.

Describe the evaluation design for the program as developed/revised.

Program evaluation includes - written feedback from new educator and preceptors at the completion of each learning module, short interviews mid-program, at completion and six months later by an educator not involved in preceptorship to assess program component effectiveness. Specific questions were developed.

What was your role in the development/revision of the program?

I was the dietitian CDE preceptor. Was involved in development of the program and took a lead role with nurse educator to create competencies, moderated the focus group, assisted with analysis and co-wrote the program with nurse educator.

Manager's
Name: (print)

S. Blackstone

Manager's
Signature:

S Blackstone

OR ANOTHER CDE® MAY SIGN ONLY IF A MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:

Name: (print)

Signature:

Portfolio Page:

4D: Development and/or Revision and Evaluation of a Patient or Professional Education Program

Programs considered in this section include formal interventions such as classes, telephone protocols, videos, computer learning programs, self-learning manuals etc.

Professional education programs are formal interventions with goals, objectives, a variety of learning methods and evaluation, for example:

- A formal competency based diabetes education program for Home Care nurses in diabetes.

Criteria:

- The development/revision and evaluation may be done as an individual or as part of a team.
- For credit, the CDE® must be involved in **all aspects** of development/revision and evaluation of the material or resource and be able to identify his/her specific contributions.

NOTE: evaluation must be completed to qualify for credit.

Required Documentation: 4D	Credits Obtained
<p>Completed documentation using Form 4D. The form must be signed by a Manager. If a Manager is unavailable another CDE® who is familiar with your practice may sign.</p> <p>See sample form on next page.</p>	<p>15 credits per program developed and evaluated.</p>

Sample Form

Form 4D: Development and/or Revision and Evaluation of a Patient or Professional Education Program

15 Credits per Program Developed and Evaluated Issued: 20XX

NAME: Jennifer Brown DATE (mm/yy): Project Completed: August 2016

CTFN No.: 0000000001 Evaluation Completed: February 2017

NOTE: The information provided should not exceed two pages.

NAME or TITLE of PROGRAM: *Practice based support for primary care physicians by diabetes educators.*

Describe the needs assessment which led to the development of the program.
Need for the program was identified by:

- *Diabetes educators - minimal client follow-up post basic education program*
- *Physicians - specific physicians identified interest in team practice, additional support*
- *Survey of clients re their interest in the service, potential benefits*
- *Review of literature on diabetes educators working in primary in other locations e.g. UK*

Describe the program, objectives, development methods.
Objectives:

- *To provide continuing diabetes education and support to people with diabetes/families in conjunction with visits to a primary care provider*
- *To work collaboratively with primary care physicians to support use of CPGs, ongoing care and management of diabetes and related conditions (complications, hypertension)*

Program design was tailored to each practice and minimum criteria were established for seeing clients in primary care. Educators used common tools for data collection and all introduced the CPG care flow sheet into the primary care practice. Educators spent 10-12 months in each practice.

Describe the evaluation design for the new program.
Major evaluation components were

- *Client satisfaction surveys at end of each visit x 6 months*
- *10% of clients were interviewed by external person within 2 weeks of their visit*
- *All educators and most physicians participated in interviews at the completion of project*
- *Data collection included both process indicators (satisfaction, team functioning etc.) and clinical and behavioral indicators*

What were the results of the evaluation (provide a brief description).
All (clients, physicians, educators) satisfied with service in same location, communication and convenience for clients. Major behavior changes: increase in frequency of blood glucose monitoring, greater frequency of screening tests for diabetes complications. Clinical indicators: average decrease in A1C was 1.4%. In addition, 34 clients were started on insulin through the primary care practice. The team function scores were measured pre, mid-point and at the end - improved over time - specific issues were identified which will help ongoing service in primary care.

Who worked on the development and evaluation of the program? *Core team of diabetes educators developed the service model, had assistance from Research Services in the design of evaluation and with statistical analysis. One member wrote the final report and everyone contributed to review and recommendations.*

What was your role in the development and evaluation of the program? *Member of the core team - active in promoting service, doing background reading, collected data as part of service, reviewed drafts of report and helped to write the recommendations and revise the service model.*

Manager's Name: (print) S. Blackstone	Manager's Signature: <i>S Blackstone</i>
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OR ANOTHER CDE® MAY SIGN ONLY IFA MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:	Name: (print)	Signature:
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Portfolio Page:

4E: Short Presentations or Teaching

Short presentations or teaching that is diabetes-related **and represents new learning for the CDE®**. The audience for these presentations may include:

- Health professional practitioners
- Students

NOTE: If these presentations require additional reading / research by the CDE®, claim credit under 3B.

Examples of acceptable presentations include:

- Presenting at a journal club of health professionals (new learning by reading current articles on topic).
- Presenting an inservice to students on a diabetes-related topic (new learning by updating knowledge, researching/reading related to the topic and presented at a level beyond client education).
- Giving a short presentation as part of a local workshop to Home Care Nurses (new learning by updating knowledge, researching/reading related to the topic and presented at a level beyond client education).
- Updating peers following the annual DC conference (new learning from the conference and requires CDE® to understand and explain information and perhaps related to/apply to clinical situations).

Examples of presentations **NOT** considered acceptable:

- Public presentation, service group or TV appearance to explain risk factors for type 2 diabetes (basic diabetes prevention information).
- Presentation to teachers on behalf of a child who is starting school (related to regular diabetes program).
- Presentation on diabetes medications to a local diabetes support group (basic diabetes education).
- Community presentation to people newly diagnosed with diabetes (basic diabetes education).
- Grocery store tour for the public or people with diabetes (basic diabetes education).

Criteria:

- Presentation or teaching must be diabetes specific and be related to the CDE® competencies.
- The preparation of the presentation **MUST** involve new learning for the CDE®.
- Each presentation/teaching topic can be counted only once in 5 years, unless there has been significant revision. For example, the same presentation may be given to different audiences (dietitians and pharmacists), but could only be counted once.

Required Documentation: 4E	Credits Obtained
<p>Documentation of presentations or teaching with required information on Form 4E. Do not include copies of presentations or program brochures</p> <p>NOTE: Be sure to list 1 to 3 learning objectives, CDE® competencies and 1 to 2 sentences about your new learning for each presentation.</p> <p>See sample form below.</p>	<p>5 credits per presentation or teaching</p>

Sample Form

Form 4E: Short Presentations or Teaching

5 Credits per Presentation or Teaching

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

Credits this Page	10
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Date	Topic	↓	1 to 3 CDE® Competencies	Your New Learning 1 to 2 Sentences	Audience	Credits
			Learning Objectives			
Jan 25/14	<i>Advanced Carbohydrate Counting - theory and practice</i>	2.H	<i>To learn the carbohydrate content of foods and calculate the carbohydrate content of meals.</i>	<i>I became aware of how to calculate carb content of sugar alcohols</i>	<input checked="" type="checkbox"/> <i>Students</i> <input checked="" type="checkbox"/> <i>Health Professionals</i>	5
Nov 8/16	<i>Insulin Adjustment for Home Care Nurses</i>	3.1.G	<i>To understand the principles of insulin adjustment including creating insulin grids for clients</i>	<i>I gained a better understanding of factors to consider when adjusting insulin doses at meals</i>	<input checked="" type="checkbox"/> <i>Students</i> <input checked="" type="checkbox"/> <i>Health Professionals</i>	5

Portfolio Page:

4F: Presentation as part of a Professional Conference

A professional body, academic or healthcare organization, or industry must sponsor the conference. The annual national DC Professional Conference and DCPSC conferences are included. Presentations may include: workshop session, seminar, plenary session, research abstracts or poster presentations (For other presentations see 4E).

Repeat sessions can only be counted once. A poster presentation and an oral presentation on the same topic, but at different venues, will each receive credit.

Examples of acceptable presentations:

- Presentation of a session at diabetes conference sponsored by the provincial diabetes program.
- Poster session at the DC/DCPSC Annual Professional Conference.
- Workshop for health professionals on stages of changes sponsored by a pharmaceutical company.

Example of presentation which is **NOT** acceptable:

- Presentation at DC sponsored public forum or expo.

Criteria:

- Conference presentation must be diabetes related.
- Sponsoring organization must be from the list above
- Presentations may be individual or as part of a panel or team.
- Presentation cannot be related to the activities considered to be part of a CDE®'s normal job routine and must demonstrate new learning for the CDE®.

Required Documentation: 4F	Credits Obtained
<p>Documentation of presentation on the Form 4F. Include a copy of the conference brochure or published abstract in your portfolio. If you received evaluation results, include this in your portfolio.</p> <p>See sample form on next page.</p> <p>NOTE: <i>If you are uncertain if a presentation qualifies in this category, e-mail cpquestions@cdec.ca or fax 905 838 4899 and provide details.</i></p>	<p>10 credits per conference presentation.</p>

Sample Form

Form 4F: Presentation as Part of a Professional Conference

10 Credits per Conference Presentation

Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000000001

Credits this Page	10
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Date and Conference Title	Presentation Title and Co-Presenters	Learning Objectives	Your New Learning 1 to 2 sentences	Credits	Supporting Documents in Portfolio
<p><i>May 15, 2014</i></p> <p><i>Provincial Nurses' Assoc. Conference</i></p>	<p><i>Multidisciplinary approach to mgmt. of women with pre-existing diabetes, planning pregnancy</i></p> <p><i>Pregnancy and Diabetes Team, IWK Health Center, Halifax, N.S.</i></p>	<p><i>- understand the role of each team member in mgmt.</i></p> <p><i>- the importance of frequent follow-up</i></p> <p><i>- goals of mgmt</i></p> <p><i>-expected outcome</i></p>	<p><i>I became familiar with most recent guidelines for pregnancy planning for women with diabetes.</i></p>	<p>10</p>	<p><input checked="" type="checkbox"/> <i>brochure / abstract</i></p> <p><input checked="" type="checkbox"/> <i>Session evaluation</i></p>

Portfolio Page:

4G: Teaching or Tutoring in a Course in an Academic or Recognized Institution

Teaching or tutoring in a course for more than 2 sessions. Recognized institutions may include health professional or healthcare organizations. Teaching/tutoring may also be through distance education.

Examples of tutoring: academic diabetes education course.

Criteria:

- The course content **must** be diabetes related.
- Teaching or tutoring courses which are repeated can only be counted once in 5 years unless there has been significant revision.
- Must have taught/tutored more than 2 sessions.
- Course curriculum must be included.

Required Documentation: 4G	Credits Obtained
<p>Documentation of teaching/tutoring on Form 4G.</p> <p>Manager or teaching/tutoring supervisor must sign each entry.</p> <p>Include a copy of the course curriculum in your portfolio.</p> <p>See sample form on next page.</p>	<p>10 credits per course or year of tutoring.</p>

4H: Writing Examination Questions for a Regulatory Body

A formal process of writing examination questions and directed by a regulatory body.

Criteria:

- The questions must be diabetes related

Required Documentation: 4H	Credits Obtained
<p>Document the writing of examination questions for a regulatory body on Form 4H.</p> <p>Include invitation letters or similar documentation from a regulatory body in portfolio.</p> <p>See sample form on next page.</p>	<p>5 credits per Credit Collection Year.</p>

Sample Form


Form 4G: Teaching or Tutoring in a Course in an Academic or Recognized Institution

10 Credits per Course or Year of Tutoring

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

Credits this Page	10
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Date	Course Title and Institution	Length	Course Objectives	Role of CDE®	Manager or Faculty Signature	Credits
<i>April 30, 2014</i>	<i>Advanced Diabetes Education Course, Closeby University</i>	<i>10 weeks</i>	<i>At completion of course learner will describe diabetes self-management demonstrate skill in facilitating self-management skills with people with diabetes as documented in the course syllabus</i>	<i>Tutor for 10 students in the program. Checked in with each student 2x during program, responded to student requests, marked assignments</i>		10

Portfolio Page:

Sample Form

Form 4H: Writing Examination Questions for a Regulatory Body

5 Credits per Credit Collection Year

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

Credits this Page	5
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Date of Activity	Name of Regulatory Body	Credits	Invitation Letter in Portfolio
<i>March 2015</i>	<i>College of Pharmacists, North Overshoe, continuing education exam</i>	5	✓

Portfolio Page:

Category 5 - Publications, Quality Improvement and Research Activities

For self-published items, such as eBooks, please contact the Credit Portfolio committee for pre-approval. Request must be received by September 30th of your 5th Credit Collection Year to allow for review prior to you applying for Certification Maintenance.

5A: Peer-Reviewed Publications

This activity includes the publication of items such as articles, papers, modules or book chapters which are peer reviewed.

Criteria:

- The published item must be diabetes related.
- The published item must cover 1 to 3 CDE[®] Competencies.
- The item must be published in your Credit Collection Period.

Required Documentation: 5A	Credits Obtained
<p>Document the name of paper/module/book chapter with complete citation of publication on Form 5A. Put a copy of the letter of acceptance for publication in your portfolio.</p> <p>See sample form below.</p>	15 credits per publication

Sample Form

Form 5A: Peer-Reviewed Publications
15 Credits per Publication

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 000000001

Credits this Page	15
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Publication Date	Complete Citation of Publication	1 to 3 CDE [®] Competencies		Publication Acceptance Letter in Portfolio
		↓	Credits	
<i>March, 2013</i>	<i>Smith B, Jones T. The History of Diabetes Education in Canada. Can J Diabetes. 2013; 34(3):3-6.</i>	<i>6.1</i>	15	✓

Portfolio Page:

5B: Non-Peer-Reviewed publications and Peer-Reviewed Case Studies or Letters

Activity includes publication of papers, pamphlets, internet articles, and book chapters. Case studies or letters to the editor, even if they are in a peer-reviewed journal, are considered in this activity.

Examples of publications may include:

- Diabetes Dialogue
- The Diabetes Communicator (TDC)*

Criteria:

- The published item MUST be diabetes related.
- The published item must cover 1 to 3 CDE® Competencies.
- The item must be published in your Credit Collection Period.

*If the article in TDC is original writing with references and not a synopsis of something written previously or a review of another author or a review of websites, books or conferences then you may claim 8 credits for this activity.

Required Documentation: 5B	Credits Obtained
Document the name of paper/module/book chapter with complete reference information on Form 5B. Put a copy of the letter of acceptance for publication in your portfolio.	5 credits per publication
<u>Original</u> referenced article in <i>Diabetes Communicator</i> (see * above) Document the article with complete reference information on Form 5B. Put a copy of the letter of acceptance for publication in your portfolio.	8 credits per publication

Form 5B: Non-Peer-Reviewed Publications and Peer-Reviewed Case Studies or Letters

Issued: 20XX

Sample Form

NAME: Jennifer Brown

CTFN No.: 000000001

Credits this Page

13

Publication Date	Complete Citation of Publication	1 to 3 CDE® Competencies		Publication Acceptance Letter in Portfolio
		↓	Credits	
September, 2014	Brown J., <i>Effecting Change in the Management of Diabetes, Diabetes Care News, Fall 2010 pgs 9-12.</i>	6.J	5	✓
February, 2016	Brown J., <i>Practical Tips for Working with Teenager using an Insulin Pump. The Diabetes Communicator. 201e;3(2):3-4 .</i>	3.1.B, C,D	8	✓

Portfolio Page:

5C: Publication of Books (peer-reviewed)

Books published.

Criteria:

- The content of the book must be diabetes related.
- 1 to 3 CDE® Competencies must be covered in the book.
- The book must be published in your Credit Collection Period.

Required Documentation: 5C	Credits Obtained
<p>Document the complete reference for the book on Form 5C. Give a brief description of how your book was peer reviewed. Indicate 1 to 3 CDE® Competencies covered in the book. Include a letter of acceptance for publication in your portfolio.</p> <p>NOTE: to obtain credits for this category, the entire book must have been written by the CDE®, not a chapter or a section. See 5A to obtain credit for writing a chapter or a section of a book.</p>	<p>20 credits per publication.</p>

Sample Form

Form 5C: Publication of Books (peer-reviewed)

20 Credits per Publication

Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000000001

Credits this Page

20

Publication Date	Complete Citation of Publication	Description of the Peer Review Process	1 to 3 CDE® Competencies		Publication Acceptance Letter in Portfolio
			↓	Credits	
March, 2015	<i>Brown J., Using Motivational Interviewing in Diabetes Education. Long Range Publications, Southby, Manitoba. 2007</i>	<i>Drafts of the publication were reviewed by University Professor trained in subject area; 3 diabetes educators who have training in subject and 3 who have no training in this area. All reviewers were given specific criteria for their review.</i>	1.A 3.2.C	20	✓

Portfolio Page:

5D: Involvement in Quality Improvement or Research Projects

Proposal Writing Component

The CDE® must be part of the core team for research or QI involving a diabetes specific project.

Criteria:

- The project may be done as an individual or as part of a team.
- For credit, the CDE® must be involved in **all** aspects of the proposal writing and be able to identify his/her specific contributions.
- Project must be diabetes specific and related to the CDE® competencies.
- The proposal writing or charter for quality improvement component must be completed to submit for credit.

Required Documentation: 5D	Credits Obtained
<p>Completion of Form 5D. The form must be signed by the Manager/Researcher. If the Manager/Researcher is unavailable another CDE® who is familiar with your practice may sign.</p> <p>Copy of the executive summary of the proposal for the research or quality improvement project.</p> <p>See sample forms on next page.</p>	<p>20 credits per proposal. A proposal may only be claimed for Credit once in a Credit Collection Period.</p>

**Form 5D (Research):
Involvement in Research Projects - Proposal Writing**

Sample Form

20 Credits per Proposal.

A proposal may only receive credit once in a Credit Collection Period.

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

DATE COMPLETED: MONTH: August YEAR: 2016

NOTE: The information provided should not exceed two pages.

<p>Name or Title of Proposal. <i>Community Diabetes Workers (CDWs): Partners in Diabetes Education</i></p>	<p><input checked="" type="checkbox"/> research project <input type="checkbox"/> quality improvement project</p>
<p>State the problem or issues which led to the research project. <i>Aboriginal clients with diabetes who live in the inner city frequently do not access services of the DEC and if they do attend usually do not participate in follow-up. Significant increase in diabetes in this population, which is often also dealing with poverty and associated issues, transient in the city.</i></p>	
<p>State the project objectives. <i>To provide a basic, individual, culturally sensitive diabetes education for urban dwelling Aboriginal people with diabetes. To examine the role of Community Diabetes Workers in diabetes education and assisting clients to access other resources in the city for support. To determine education and clinical outcomes pre and post intervention by the CDWs.</i></p>	
<p>Describe the design for the project. <i>Recruitment will be done through family physicians and community organizations for adults (over age 18) with diabetes who meet the study inclusion criteria. After consent and initial assessment of current self-care practices, knowledge and skills and clinical parameters, participants will be randomized into the intervention (visits by a CDW for 6 months) or control group (usual care). Follow-up measurements will be done in 6 months. Those in the control group will then receive the intervention and serve as their own controls (pre/post study).</i></p>	
<p>Who worked on the proposal for the project? <i>A team of 12 (3 nurse educators, 2 dietitians from our Diabetes Education Centre (DEC), 6 community diabetes workers and one university professor from Community Health and Nursing). I was the lead nurse educator from our DEC and was fully involved in all aspects of the research project development.</i></p>	
<p>What was your role in the proposal development? <i>I chaired research team meetings to discuss issues, literature review, proposal writing and funding application. I acted as one of the 5 representatives from our DEC (3 nurse educators, 2 dietitians), and was fully involved in all aspects of the research project development.</i></p>	
<p>Describe the CDE® competencies this project relates to and what new learning you received in the development of the research project and/or quality improvement project: <i>4A, 4B, 4J. I became more sensitive to aboriginal culture and the importance of adapting diabetes awareness programs to reflect these values.</i></p>	

<p>Manager's/Researcher's Name: (print) <i>S. Blackstone</i></p>	<p>Manager's/Researcher's Signature: <i>S Blackstone</i></p>
<p>Position: <i>Manager</i></p>	

OR ANOTHER CDE MAY SIGN ONLY IF A MANAGER/RESEARCHER IS UNAVAILABLE TO SIGN

CTFN No.:	Name:(print)	Signature:

Portfolio Page:

Form 5D (QI): Involvement in Quality Improvement Creating the Project Charter

Sample Form

20 Credits per Charter.

A Project Charter may only receive credit once in a Credit Collection Period. Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

DATE COMPLETED: MONTH: August YEAR: 2016

NOTE: The information provided should not exceed two pages.

<p>Name or Title of QI Project. <i>Improving Outcomes for People with type 2 diabetes referred for education and to a medical specialist</i></p>
<p>State the problem or issues which led to the QI project. <i>No previous method to track outcomes and no specific processes to ensure quality education or medical review. Unable to provide continuing follow-up due to referral volumes</i></p>
<p>State the QI project aim. <i>By xxx, people with type 2 diabetes referred for services will have</i></p> <ul style="list-style-type: none"> • <i>The offer of an initial visit within three weeks of their referral with one team member [sooner if triage criteria give a higher priority to the referral]</i> • <i>Be provided with access to ongoing support and follow-up over six months by diabetes team members and community based services</i> • <i>A discharge time and plan with both the client and physician receiving a copy of the plan</i>
<p>Describe the key measures for the project (outcome, process, balancing).</p> <p><i>Outcome:</i></p> <ul style="list-style-type: none"> • <i>90% of people with diabetes have a minimum of a 1% decrease in A1C</i> • <i>75% will have A1C \leq 7%</i> • <i>75% will have LDL and total cholesterol at CDA targets</i> • <i>90% of clients will have set at least one goal for self-management using the LWCC steps documented in chart</i> <p><i>Process:</i></p> <ul style="list-style-type: none"> • <i>Utilization of community resources</i> • <i>Workings days between referral and first appointment offer</i> • <i>Number of clients with a specific discharge plan sent to family physician and client</i> • <i>Number of clients with recorded behavior changes (bg monitoring, healthy eating, insulin start)</i> <p><i>Balancing:</i></p> <ul style="list-style-type: none"> • <i>Client and staff satisfaction with services</i>
<p>What was your role in the charter development? <i>I participated in all team meetings and decision making. I assisted with writing, reviewed documents and provided input along with other team members.</i></p>

<p>Manager's/Researcher's Name: (print) <i>S. Blackstone</i></p>	<p>Manager's /Researcher's Signature: <i>S Blackstone</i></p>
<p>Position: <i>Manager</i></p>	

OR ANOTHER CDE® MAY SIGN ONLY IF A MANAGER/RESEARCHER IS UNAVAILABLE TO SIGN

CTFN No.:	Name: (print)	Signature:
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Portfolio Page:

5Ei: Involvement in a Research Project. Implementation, Data Analysis, Interpretation and Dissemination Phases

5Eii: Development of Policies and Procedures

5Eiii: Involvement in a Quality Improvement Project

There are three options to 5E. Each option (research, quality improvement or policy/procedure) can be completed credit. You may complete more than one.

The CDE® must be part of the core team for research or QI involving a diabetes specific project

Criteria:

- The development and evaluation may be done as an individual or as part of a team.
- For credit, the CDE® must be involved in **all aspects** of implementation, data analysis, interpretation and dissemination phases and be able to identify his/her specific contributions.
- Project must be diabetes specific.
- Project must be completed to submit for credit.

Development of policies and procedures can be included as part of quality improvement.

Criteria: as above for QI or research project.

Required Documentation: 5E	Credits Obtained
<p>Research Project:</p> <ul style="list-style-type: none"> • Completion of Form 5Ei and a copy of the executive summary of the results from the research. <p>Development of Policy and Procedures:</p> <ul style="list-style-type: none"> • Completion of Policy and Procedure Form 5Eii. <p>Quality Improvement Project:</p> <ul style="list-style-type: none"> • Completion of Quality Improvement Form 5Eiii. <p>See sample forms on the next three pages.</p>	<p>15 credits per project or policy</p>

Form 5E i: Involvement in Research Projects - Implementation, Data Analysis, Interpretation and Dissemination Phases

15 Credits per Project or Policy

Issued: 20XX

NAME: Jennifer Brown
CTFN No.: 0000000001

Sample Form

DATE COMPLETED: MONTH: August YEAR: 2016

NOTE: The information provided should not exceed two pages.

Name of Research Project.

Community Diabetes Workers (CDWs): Partners in Diabetes Education

What were the objectives?

To provide a basic, individual, culturally sensitive diabetes education for urban dwelling Aboriginal people with diabetes.

To examine the role of Community Diabetes Workers in diabetes education and assisting clients to access other resources in the city for support.

To determine education and clinical outcomes pre and post intervention by the CDWs.

Describe the major findings as a result of the research project.

Clients who were seen by the Community Diabetes Workers had compared to the usual service group: a higher level of satisfaction with service; lower A1Cs ($p < 0.05$); better knowledge of self-care skills (n.s.); tested their blood glucose more often ($p < 0.05$)

What will be the impact of these findings?

The use of CDWs has the potential to enhance service and quality of care for 'hard to reach' clients.

The process evaluation demonstrated the need for a structured orientation and ongoing education program and regular follow-up for supervision and support of the workers. Study accepted for presentation at CDA professional conference and will also be presented at Health Region for funding.

Besides yourself, who worked on the research project implementation, analysis, and interpretation?

Researchers included University professors from Community Health and Nursing. Two nurse educators from the DEC were also on the research team and included in implementation, and interpretation of results.

What was your role in the research program?

One of the nurse educators fully involved in all aspects of the research project. Chaired research team meetings to discuss planning and eventually results. Will present on behalf of the team at CDA.

Manager's/Researcher's Name: (print)

S. Blackstone

Manager's /Researcher's Signature:

S Blackstone

Position: *Manager*

OR ANOTHER CDE® MAY SIGN ONLY IF MANAGER/RESEARCHER IS UNAVAILABLE TO SIGN

CTFN No.:

Name: (print)

Signature:

Portfolio Page:

Form 5E ii: Policy and Procedure Development

15 Credits per Project or Policy

Issued: 20XX

NAME: Jennifer Brown
CTFN No.: 0000000001

Sample Form

DATE COMPLETED: MONTH: August YEAR: 2017

NOTE: The information provided should not exceed two pages.

Name of Policy/Procedure:

Management of Hypoglycemia During Hospitalization

What needs prompted the development of the policy/procedure?

*Complaints from people with diabetes about inappropriate treatment of hypoglycemia during their hospitalizations [access to glucose, amount recommended, access to bg monitoring equipment]
Brief review of usual hypoglycemia management on inpatient units, including short knowledge quiz done by staff members on 6 inpatient units. [staff found not to be current with CDA guidelines]*

Summary of research done to develop the policy/procedure.

Working group formed representing managers, staff, clinical educator and DEC to

- *Review of CDA guidelines*
- *Contacted 4 other hospitals to review their policies and procedures*

Summary of the policy/procedure implementation and the evaluation process.

Implementation plan developed including posters on all units, unit in-services to nursing, medical and dietetics staff members. Follow-up audit on units in 3 months and 3-question survey with a random sample of inpatients with diabetes. Results indicated change in practice with minor areas of reinforcement needed.

Who worked on the development/implementation/evaluation of the policy/ procedure?

Working group as above did the design for all phases - development, implementation and evaluation.

What was your role in the development/implementation/evaluation of the policy?

I Chaired the committee and did the majority of the writing. I Assisted with data collection in the evaluation and analysis/review of the results.

Manager's Name: (print) *S. Blackstone*

Manager's Signature: *S Blackstone*

OR ANOTHER CDE® MAY SIGN ONLY IF MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:

Name:(print)

Signature:

Portfolio Page:

Form 5E iii: Involvement in Quality Improvement Project - Implementation

15 Credits per Project or Policy

Issued: 20XX

Sample Form

NAME: Jennifer Brown CTFN No.: 0000000001

DATE COMPLETED: MONTH: August YEAR: 2014

NOTE: The information provided should not exceed two pages.

Name of Quality Improvement Project.

Improving Outcomes for People with type 2 diabetes

What was the project aim (from charter)?

By xxx, people with type 2 diabetes referred for services will have

- *The offer of an initial visit within three weeks of their referral with one team member [sooner if triage criteria give a higher priority to the referral]*
- *Be provided with access to ongoing support and follow-up over six months by diabetes team members and community based services*
- *A discharge time and plan with both the client and physician receiving a copy of the plan*

Describe the major Plan/Do/Study/Act cycles in the project.

Pre-implementation PDSA cycles were done to test the materials with feedback from staff and potential clients.

In the first four months of implementation, PDSA cycles were done to further test the processes and forms being used - with each cycle changes and improvements were made.

After 8 months, data was collected for all process measures and early results for outcome measures. Client and staff satisfaction surveys were completed. Telephone interviews were done with 10% of clients who had completed the program.

After 14 months, all of the above data measures were collected again to form the final results of the quality improvement project.

What were the major results for the measures in the project charter?

Outcome:

- *88% of people with diabetes had a minimum of a 1% decrease in A1C*
- *65% had A1C \leq 7%*
- *76% had LDL and total cholesterol at CDA targets*
- *90% of clients set at least one goal for self-management*

Process:

- *58% of clients used community resources*
- *Average of 14 Working days between referral and first appointment offer*
- *98% clients with a specific discharge plan sent to family physician and client*
- *98% of clients with recorded behavior changes*

Balancing:

- *Client + staff satisfaction positive; several suggestions to improve program.*

What was your role in the QI program?

I assisted with final chart audits; reviewed and discussed results as part of team and presented to other program staff members. Part of the team which used these results to implement program changes and create a new program quality improvement charter.

Manager's Name: (print)

S. Blackstone

Manager's Signature:

S Blackstone

OR ANOTHER CDE® MAY SIGN ONLY IF MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:

Name: (print)

Signature:

Portfolio Page:

5F: Editorial Board, Editor or Associate-Editor for Diabetes Related Professional Journal

Activity relates only to peer-reviewed professional journals.

Excluded: Industry sponsored and non-peer reviewed journals such as Canadian Diabetes.

Criteria:

- The publication must be diabetes related.

Required Documentation: 5F	Credits Obtained
Activity documented on form 5F and, In your portfolio include letter of appointment as editor or assistant editor See sample form below.	10 credits per Credit Collection Year

Form 5F: Editorial Board, Editor or Associate Editor for Diabetes Related Professional Journal

10 credits per Credit Collection Year

Issued: 20XX

NAME: Jennifer Brown

Sample Form

CTFN No.: 0000000001

Credits this Page	10
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Date	Journal	Role and Description	Credits	Appointment Letter in Portfolio
January, 2014	Canadian Journal of Diabetes	Associate editor. Responsible for working with Editor and committee to develop the journal content plan, recruiting authors and monitoring the peer review process	10	✓

Portfolio Page:

5G: Development of Best Practice Guidelines or Clinical Practice Guidelines, Member of an Expert Panel

The best practice or clinical practice guidelines must be produced by an established academic, professional or health care institution/association.

Criteria:

- The guidelines must be related to diabetes and the CDE® competencies.
- The CDE® must be responsible for developmental processes, literature review, analysis, documentation and writing.
- Credit for any given project may only be claimed once in a Credit Collection Period.

Required Documentation: 5G	Credits Obtained
Activity documented on form 5G and, In your portfolio include a copy of the letter of invitation to participate on the expert panel and briefly describe your role. See sample form below.	20 credits per project per Credit Collection Period.

Form 5G: Development of Best Practice Guidelines or Clinical Practice Guidelines, Member of an Expert Panel

20 Credits per Project per Credit Collection Period

Issued: 20XX

Sample Form

NAME: Jennifer Brown

CTFN No.: 000000001

Credits this Page

20

Date	Group Producing Guidelines	Role and Description	1 to 3 CDE® ↓ Competencies	Credits	Appointment Letter in Portfolio
January 2014	Canadian Diabetes Association	<i>Member of expert panel on blood glucose monitoring. Responsible for literature review, grading evidence and writing and edit drafts, including recommendations, with 2 other panel members.</i>	1.A 3.2.C	20	✓

Portfolio Page:

5H: Program Evaluation - Design and Implementation

A formal process of conducting a program evaluation either through an external process or using your own evaluation against best practice guidelines.

Examples of acceptable external processes include:

- Program evaluation as part of CCHSA accreditation.
- Program evaluation as part of the DC’s National Recognition Program.

Criteria:

- The program under review must be diabetes specific.
- The CDE® must demonstrate his/her role in the evaluation process and must be actively involved in all aspects of the program evaluation.
- The minimum expectation for program evaluation is a peer review process.
- Credit for any given program evaluation may only be claimed once in a Credit Collection Period.

Required Documentation: 5H	Credits Obtained
<p>Documentation of the program evaluation process, outcomes using Form 5H. CDE® must also indicate his/her role in the process.</p> <p>The form must be signed by a Manager. If a Manager is unavailable another CDE® who is familiar with your practice may sign.</p> <p>See sample form on next page.</p>	<p>20 credits per program evaluated per Credit Collection Period</p>

Form 5H: Program Evaluation - Design and Implementation

20 credits per program evaluated per Credit Collection Period

Issued: 20XX

NAME: Jennifer Brown CTFN No.: 0000000001

Sample Form

DATE EVALUATION COMPLETED: MONTH: August YEAR: 2015

NOTE: The information provided should not exceed two pages.

Name of Program Evaluated. *Gestational Diabetes Program at DEC in Faraway, Canada*

What method was used for the program evaluation?

Part CCHSA organization accreditation Participated in the CDA/DES National Recognition Program Designed our own program evaluation - please list objectives

1. *To determine the impact of the program on outcomes of pregnancy*
2. *To determine the adequacy [convenience, coordination, overall satisfaction] of the service from the perspective of the clients*

Describe the program evaluation process used.

Objective 1: Reviewed 2003 Clinical Practice Guidelines to determine criteria for 'outcomes of pregnancy' - designed a data collection form and asked participating hospitals to complete a chart audit.

Objective 2: Designed a focus group process, facilitated by an external person, and invited 10 mothers who had been through the program in the past year to attend. Provided childcare, transportation, and snack for the group.

Describe the major findings as a result of the program evaluation.

Objective 1:

- *89% of women had screening for GDM done within 24-28 weeks gestation*
- *92% of women had babies at term with a birth weight <9 lbs.*
- *34% of women participated in the post GDM follow-up service and screening*

Objective 2:

- *Women were generally satisfied with program services and particularly appreciated the coordination between Home Care and Hospital services or tertiary referral service*
- *Women found community-based services convenient*
- *Women found the experience demanding and, at times frightening, even though they commented frequently about the supportive staff members*
- *Most women said they did not feel the need of follow-up postpartum, felt good, had difficulty getting extra appointments and did not like the idea of being tested again.*

How does your program plan to use these findings?

Greatest challenge is in the postpartum follow-up. We plan to discuss the results with the community health nurses, the community liaison workers and physicians. We believe we can find alternatives for testing, but also need to spend more time talking with clients, ensuring we understand their feelings on this issue, but also providing better information and support. Plan to hold another focus group 12 months after we develop and then implement our new strategies.

Who worked on the evaluation of the program? *Involved staff were: dietitian and diabetes nurse educator for the GDM program. We consulted with others involved in the program through the hospital, literature and an external consultant for the focus group.*

What was your role in the evaluation of the program?

As the diabetes nurse educator helped to develop the evaluation plan, participated in development of the focus group questions, reviewed the data from the chart audit and focus group and co-wrote the recommendations. Will also be involved in the follow-up plan.

Manager's Name: (print) *S. Blackstone*

Manager's Signature: *S Blackstone*

OR ANOTHER CDE MAY SIGN ONLY IF A MANAGER IS UNAVAILABLE TO SIGN

CTFN No.:

Name:(print)

Signature:

Portfolio Page:

5I: External Reviewer for Provincial, National or Regional Resources

Examples where CDE® may be an external reviewer:

- best practice or Clinical Practice Guidelines (CPG's).
- **full** research grant proposals; does not include "letters of intent".
- reviewer of CDECB exam questions.
- peer reviewer for journals, books, abstracts or posters.
- reviewer for National Nutrition Committee new or revised materials.
- member, Diabetes Dialogue editorial board.

Criteria:

- The CDE® competencies must be considered in the review.
- Specific review criteria must be used.

Required Documentation: 5I	Credits Obtained
Document activity on form 5I and, Letter/email inviting CDE® to be a reviewer included in portfolio. See sample form below.	5 credits per external review performed.

Form 5I: External Reviewer for Provincial, National or Regional Resources

5 credits per external review performed.

Sample Form

Issued: 20XX

NAME: Jennifer Brown

Credits this Page	10
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CTFN No.: 0000000001

Date	Organization	Role and Description	1 to 3 CDE® Competencies		Invitation Letter or Email in Portfolio
			↓ Credits		
January 2014	<i>Canadian Diabetes Association National Nutrition Committee</i>	<i>Volunteered to review a draft version of the new meal planning system - Beyond the Basics and provide written comments. Also asked to seek comments from colleagues.</i>	1.A 3.2.C	5	✓
February 2015	<i>Provincial Diabetes Program</i>	<i>Volunteered to review the insulin adjustment guide template, which was developed by a provincial working group. The guide was reviewed, revised and published in May 2015. It is now the provincial booklet in Manitoba for use in training Educators on how to work with patients to adjust insulin.</i>	3.1.G	5	✓

Portfolio Page:

Category 6 - Leadership Activities

6A: Professional Leadership in Diabetes Education

The CDE®, in a professional role, guides or directs the decision making process of a group resulting in an enhancement of diabetes education, knowledge or practice.

Examples of positions where a CDE® may demonstrate professional leadership include:

- Regional, provincial or federal advisory/task forces.
- Some DCPSC, DC boards and executive or standing committees.
- Some local committee/group work can receive credit if the CDE®'s membership is beyond the usual job expectations and the CDE® can demonstrate leadership and outcomes.

Attendance at the DCPSC Leadership Forum **cannot** be claimed for credit here. Please claim credit for any diabetes-related sessions that were part of the forum in section 2A: Short Term Learning Events.

Being a member of a committee does not automatically equate to credits.

Criteria:

- Group or committee must be diabetes related.
- The CDE® must demonstrate **both professional leadership; and**
- **be able to describe specific outcomes which resulted in an enhancement of diabetes knowledge or practice.**
- Credit for the same leadership position can only be claimed once in your Credit Collection Period unless different outcomes can be shown.

Required Documentation: 6A	Credits Obtained
<p>Document leadership and outcomes on Form 6A. Include a letter of appointment in your portfolio.</p> <p>If the leadership position is the same for more than one year, complete a form 6A for <u>each</u> Credit Collection Year indicating your specific role and the annual outcome. While in the same leadership position, you can only claim credit once for a given outcome during your Credit Collection Period.</p> <p>See sample form on next page.</p>	<p>20 credits per group per Credit Collection Year as long as a different outcome can be shown for each year.</p>

Form 6A: Professional Leadership in Diabetes Education

20 Credits per Group per Credit Collection Year as long as a different outcome can be shown for each year.

Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000000001

Sample Form

NOTE: The information provided should not exceed two pages.

Name of Group/Position Held

Regional Diabetes Working Group, Member

Year for which credit is being claimed. 2015

Purpose of the Group/Committee

Working Group has developed a diabetes plan for health region and is funded through a small annual budget from the provincial government. Three priorities chosen for this year and a working group formed for each one.

Describe your leadership role with this group

you must describe your leadership role

I was the Chair of working group which extended diabetes education services into primary care with family physicians as a pilot project with evaluation. I coordinated meetings of working group, liaison with evaluation support personnel, wrote draft of final report and facilitated discussion of recommendations.

Describe the outcomes achieved as a result of your leadership

Progress made with all 3 projects, two are completed and have evaluations done with final reports and recommendations. Group continues to coordinate several diabetes-related activities. Working group on diabetes ed services in primary care had positive outcomes and is now partnering with another group to enhance and continue service, extend evaluation to include behavioral and clinical outcomes.

Describe how your knowledge or practice was enhanced as a result of these outcomes

You must describe how your knowledge or practice was enhanced

This experience has allowed me to gain a better understanding of the diabetes services offered in our community, to make it easier to refer clients to appropriate services and to ensure that we more clearly document behavioral outcomes.

Letter of appointment/or invitation to participate in portfolio

Signed by Manager or Individual who can verify the CDE®'s leadership role and outcomes:

Name: (print) S. Black

Position: Chair, Regional Diabetes Working Group

Signature: *S. Black*

Portfolio Page:

6B: CDE® Acting as an Expert Advisor

CDE® is invited or appointed to a professional committee/task force as an expert resource person on a topic(s) related to diabetes education or care.

Examples may include:

- CDE® is invited to an expert committee to evaluate a teaching tool, involving several meetings.
- CDE® invited to a hypertension working group to provide diabetes expertise.
- CDE® sits on a regional or national DC committee to provide expert advice on diabetes or diabetes education (for example, DES Standards Review Program Committee).

Criteria:

- One day Advisory Boards **do not** count.
- Needs to be involved in more than one meeting.
- The purpose of the event cannot be related to the marketing of a new product.
- Expertise or advice provided as an expert by the CDE® must be diabetes related.
- Expertise or advice is beyond reviewing developed materials such as pamphlets or new materials from the National Nutrition Committee. See 5I to obtain credit as a reviewer.

Required Documentation: 6B	Credits Obtained
<p>Documentation of purpose of the committee/task force; expertise or advice provided by the CDE® on form 6B. Include a letter of appointment or invitation to participate in your portfolio. See sample form on next page.</p>	<p>10 credits per group per Credit Collection Year.</p>

Form 6B: CDE® Acting as an Expert and/or Advisor

10 Credits per Group per Credit Collection Year

Issued: 20XX

NAME: Jennifer Brown

CTFN No.: 0000000001

Sample Form

NOTE: The information provided should not exceed two pages.

Name of Group/Position Held: <i>Working Group on Self-Monitoring of Blood Glucose</i>
Year for which credit is being claimed: <i>2015</i>
Purpose of the Group/Committee: <i>Develop guidelines for the use of self-monitoring of blood glucose in people with Type 2 diabetes.</i>
Describe the expertise you have provided to this group in the past year: <i>I provided input regarding situations in which SMBG would be useful to help adjust lifestyle and medical management of diabetes. I provided knowledge of the current Clinical Practice Guidelines for nutrition, self-management education, blood glucose targets as it relates to SMBG. I reviewed relevant scientific literature to develop evidence based guidelines for the use of SMBG in Type 2 diabetes.</i>
Letter of appointment or invitation to participate in portfolio: <input checked="" type="checkbox"/>

Portfolio Page:

Appendix A - Organizing your Portfolio

Accurate documentation of completed activities is an important part of maintaining your credit portfolio. Details can easily be forgotten if not properly recorded and stored over the five-year period that you're building your credit portfolio. Do not try to commit the details to memory or wait until the final year to organize your activities.

Here are a few ideas for accurately recording and storing the information you will be required to have available for auditing purposes:

1. Purchase a binder with tabbed inserts, with attached pocket folders if possible.
 - a. Label each tab according to the activity groups (example Practice Review/ Self-assessment, Organized Learning, etc.).
 - b. When an activity is completed, record all the pertinent information pertaining to the activity in the appropriate section.
 - c. Store any Certificates of Attendance, test/exam results, peer evaluations etc. in the pocket portion. (as identified in the reporting forms for each activity).
 - d. After the Credit Portfolio is completed, the information can be easily retrieved and transferred to the Credit Summary Form.
 - e. As well, if audited, the required documents can easily be retrieved and matched to the Activity.
2. If using a computer, a database can be developed and stored in a similar manner.
 - a. One suggestion is making a file under My Documents with your favorite Word Processor or Spreadsheet program.
 - b. Try naming the new file as either CDECB or something related to the Certification Maintenance Credit Portfolio that will make it easy for you to find the file again. Then you can download the activity forms in the appendix and use these forms to record and store your activity records.
 - c. Be sure to add a way to check off a few things: if you received a certificate or verification of attendance, the place you filed the certificate and a copy of conference/workshop agendas. The copy of the agenda will have dates, topic names, length of time, etc. that will come in handy in the future or if your entry is audited. Written records can be stored in file folders (or an accordion file) for retrieval if necessary.
3. Be sure to enter the information in a timely manner so that details of the activity will not be forgotten.
4. All forms must be completed with the appropriate information to obtain full credit for the 'learning activity'.

Appendix B - Summary of Changes to CM by CP Process

As with any process, feedback and evaluation are critical to review and improve the program. As a result of questions from CDE®s, their feedback through surveys and the input of volunteer CDE®s participating with the Credit Portfolio Committees, changes have been made to the program. Please read this document carefully, share it with your colleagues and if you have questions contact us, preferably by e-mail, at cpquestions@cdec.ca

NOTE: If you started collecting credits prior to this issue of the How to Guide, you do **NOT** have to re-do anything, your forms and credits will be considered. It may be to your advantage to use some of the new credit options.

2018 HTG Changes

- For those applying for CM in 2018, 1 paper copy of your portfolio and a second copy on a USB stick in PDF format or on paper is to be submitted.
- Clarification on who may sign an activity form.
- Clarification on completing the Word format forms.
- Questions must be received by December 1st to guarantee a response before the application deadline.

2017 HTG Changes

- CTFN No.: added information on what it is and where to locate it.

Activity 2B

- We clarified that each of the DC self-study courses;

- Building Competency in Diabetes Education: The Essentials and,
- Building Competency in Diabetes Education: Advancing Practice

each may be claimed as a formal course.

2016 HTG Changes

2016 CM by CP Application

- CDE®s applying for CM by CP will be required to complete the application form and Credit Summary form online. CDE®s must send 3 paper copies of their Portfolio to the CDECB office.
- Appendix D: CM by CP Application Form removed from How to Guide.

Activity 2A revised

- Credit for virtual professional conferences added.

Activity 2A: Short Term Learning Events - Short Courses;

- For each pump listed, you may claim credit once during your current Credit Collection period for;
 - Initial training and certification on the insulin pump
 - A workshop on advanced pump features
- For each CGM listed, you may claim credit once during your current Credit Collection period for;
 - Initial training and certification on a continuous glucose monitoring system

- A workshop on interpreting CGM reports

Appendix B; continued

2016 HTG Changes (continued)

Activity 3B

- For CMEs documented on 2016 and later activity forms, only CMEs that the provider has indicated as being worth at least ½ credit can be claimed. CMEs that the provider indicates as being worth less than ½ credit are not accepted. CMEs are not cumulative.
- For Canadian Journal of Diabetes articles documented on 2016 and later activity forms, only articles under the headings “Original Research” and “Review” may be claimed for credit.

Category 5

Self published items may qualify for credit. CDE® must contact Credit Portfolio committee for pre-approval of item prior to applying for Certification Maintenance.

Appendix D: CM by CP Application Form

The CM by CP Application Form has been removed from the 2016 How to Guide.

2015 HTG Changes

- Activity forms show which Credit Collection Year they were issued; e.g. Issued: 2015
- Updated contact information for cpquestions.
- Data entered into the PDF Application form and Credit Summary form can be saved as a PDF file. (application package)
- Revised form 2B: Formal Courses introduced
- When documented on 2015 and later activity forms, all Continuing Medical Education self-study is ½ credit. (activity 3B)
- Increased page/space allowance for documenting activities

2014 HTG Changes

- Introduced a new form to record short courses as separate item: FORM 2A: SHORT TERM LEARNING EVENTS -Short Courses.
- Forms 1B and 3A removed from HTG, replaced by form 1C
- On forms 4E and 4F need to provide 1 to 2 sentences on new learning
- Alignment of Credit Collection Years with the calendar year

Appendix C - 2018 Credit Summary Form

Name: _____

CTFN No.: _____

How did you attain your current (2013) CDE® certificate?

- I wrote the exam for initial certification
- Certification Maintenance by exam
- Certification Maintenance by Credit Portfolio

Professional Status:

- Pharmacist Physician Physiotherapist Registered Dietitian
- Registered Nurse RN Extended Registered Social Worker Registered Psychologist
- Other: _____

Please enter the credits you are submitting in the appropriate location. All empty cells will be considered to be zero. You must submit a copy of all 3 pages with your 2018 CM by CP application.

Category 1. Practice Review/Self-Assessment		
Activity		Submitted Credits
1A:	External Review of CDE® Practice	
1B:	Self-Assessment of Learning Needs	
1C:	Self-Assessment of Learning Needs	
Category 1 Total		

Category 2. Organized Learning		
Activity		Submitted Credits
2A:	Short Term Learning Events	
2B:	Formal Courses	
Category 2 Total		

2018 Credit Summary Form; continued

Page 2 of 3

Name: _____

CTFN No.: _____

Category 3. Personally Designed Learning		
Activity		Submitted Credits
3A:	Report of Self-Study Plan Developed in 1B	
3B:	Self-Study - Through Reading	
Category 3 Total		

Category 4: Educational Development/Teaching		
Activity		Submitted Credits
4A:	Development and Evaluation of New Diabetes Related Educational Materials and Resources	
4B:	Preceptorship of Student or New Diabetes Educator	
4C:	Development or Significant Revision of a Program for Preceptorship of Students or new Diabetes Educators	
4D:	Development and /or Significant Revision and Evaluation of a Patient or Professional Education Program	
4E:	Short Presentations or Teaching	
4F:	Presentation as Part of a Professional Conference	
4G:	Teaching or Tutoring in a Course in an Academic or Recognized Institution	
4H:	Writing Examination Questions for a Regulatory Body	
Category 4 Total		

2018 Credit Summary Form; continued

Name: _____

CTFN No.: _____

Category 5: Publications, Quality Improvement & Research		Submitted Credits
Activity		
5A:	Peer Reviewed Publications	
5B:	Non-Peer Reviewed Publications and Peer Reviewed Case Studies or Letters	
5C:	Publication of Books (peer-reviewed)	
5D:	Involvement in Quality Improvement or Research Projects	
5E:	Involvement in Quality Improvement or Research Project - -Implementation, Data Analysis, Interpretation and Dissemination Phases.-Policy & Procedure Development	
5F:	Editorial Board, Editor or Associate Editor for Diabetes- Related Professional Journal	
5G:	Development of Best Practice Guidelines or Clinical Practice Guidelines, Member of an Expert Panel	
5H:	Program Evaluation - Design & Implementation	
5I:	External Reviewer for Provincial, National or Regional Resources	
Category 5 Total		

Category 6: Leadership		Submitted Credits
Activity		
6A:	Professional Leadership in Diabetes Education	
6B:	CDE® Acting as an Expert and/or Advisor	
Category 6 Total		

Total Submitted Credits	
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I certify this summary accurately summarizes my portfolio: _____

Signature