



# **National Association of Long-Term Care Administrator Boards**

## **NCERS Sponsor User Guide**

*(Updated February 19, 2019)*

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## 2 NCERS SYSTEM

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### A. SYSTEM INTRODUCTION

The National Continuing Education Review Service (NCERS) launched an updated system on March 21, 2016. The system, powered by Heuristics Solutions, has many updated features as outlined within this guide.

The unique usability engineering platform allows Sponsors to upload documents directly into their program applications, which will always remain part of the application. A communications platform allows sponsors to correspond directly with NAB staff. The course directory allows administrators to search on various fields (*keywords, sponsor, location, etc.*) for programs they require to meet their CE needs.

If you have any questions, please do not hesitate to contact NAB staff by phone at (202) 712-9040 or by email at [nab@nabweb.org](mailto:nab@nabweb.org).

### B. CHANGES TO YOUR BUSINESS/ COMPANY

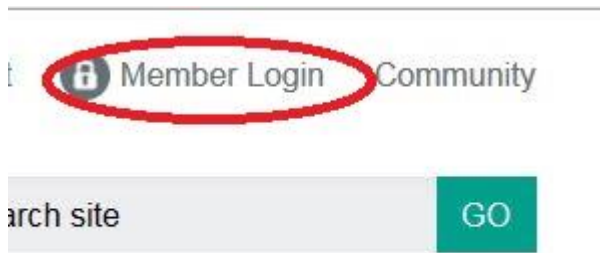
Since companies are required to meet specific criteria to become a sponsor member of NAB, all changes made to your company business model **MUST** be reported. This includes name changes, ownership changes, or changes to your overall company mission.

**PLEASE NOTE:** If a company is under new ownership or if the mission is no longer the original one that was submitted on the approved application, the new entity must retire the previous sponsor account and complete a new sponsor application. Certified Sponsor status is non-transferrable.

### C. SIGNING UP FOR A NABVERIFY ACCOUNT

Each company representative involved in the NAB CE process should have own, unique log in credentials. All company representatives with access to the NAB CE account will have administrator access which allows the option to create, edit, and submit CE courses in addition to reporting attendance to the CE Registry and paying sponsorship fees. Each company account will be assigned a primary contact and Sponsors are advised to check this for accuracy as all NAB communications are received to this email. If a company representative is also a licensed long term care (LTC) administrator with an active CE Registry, a new NAB account is not needed. Each record within our system is granted unique access and individuals can have access to their CE Registry and their company's sponsor records concurrently. Should employment change, an individual can still maintain their existing NAB account while removing the company record access.

**Please do not create multiple accounts within the NAB system.** Should you need an individual added to your company, please contact NAB at [nab@nabweb.org](mailto:nab@nabweb.org). Only existing company administrators can request for additional employees to be added to the account.



NABVerify can be accessed from the member login section of the NAB website (<https://www.nabweb.org/manage-my-account>). If you have an existing NAB account, please use your current username and password to avoid duplicate records.

If you have not created an account with NAB previously, choose the option “Not a Member? Sign Up!”  
If you are unsure of whether you have a NAB account, please email [nab@nabweb.org](mailto:nab@nabweb.org) to verify. If a customer tries to sign up for a member account with duplicate information, the system will give a warning that there is a record on file with this information.

## Login

Use the fields below to access our hidden section.

Username:   
Password:

[Forgot Password](#)  
[Not a member? Sign Up!](#)

After entering the appropriate demographic information, your NAB account will be created. This account can be used for all services that are offered through NABVerify (*as applicable*).

Please note that when creating a user login and password the system wants one that is alphanumeric meaning that ONLY letters and numbers are used without any special characters. While special characters are intermittently accepted during account sign up, this could prevent account access upon logging in at a later time.

## New Login Information

Each individual contact will have personal, unique login information (username and password). This login information is for the individual contact person named above.

User Login (alphanumeric)\*

Password (alphanumeric, mix, 8-16)\*

Repeat Password (alphanumeric, mix, 8-16)\*

## D. LOGGING INTO THE NCERS SYSTEM

Once you have created your NABVerify account, visit <https://www.nabweb.org/manage-my-account> to access your company’s account. Enter your user name and password. Please note that it may take 3-5 business days for company access to be granted and the process is only initiated once an email is received from an account administrator to [nab@nabweb.org](mailto:nab@nabweb.org).

News Events Contact **Member Login** Community

USE THE FIELDS BELOW TO ACCESS OUR HIDDEN SECTION.

Username:

Password:

**Login**

Once logging in, Providers/Sponsors will have the option to perform the following functions:

1. **NCERS Homepage/Third Party Certification Programs** – This will bring the sponsor directly to the NCERS homepage to add programs, check payment history, update/add speakers and many other features.
2. **NCERS Update Account Details** – This option will allow you to edit your **COMPANY** information. A sponsor can update their company name, address, main phone number, main email contact, and web address. A sponsor can also complete these same edits under the Company Profile link.
3. **NCERS Sponsor – Manage Employee Contacts** – This option allows the sponsor to remove employees from the **COMPANY** record who are no longer associated with the company. To remove an employee, click on their name and note the employee end date.
4. **HSE Application** – This is where you can submit an application for the Health Services Executive (HSE) qualification. Company contacts will not have access to your application as this information is part of your **INDIVIDUAL** account rather than the company account.
5. **CE Registry** – This is where administrators can track personal CE credits. As noted with the HSE application, company contacts will not have access to an administrator's personal CE Registry as this is part of an **INDIVIDUAL** account.
6. **Company Profile** - This option will allow you to edit your **COMPANY** information. A sponsor can update their company name, address, main phone number, main email contact, and web address. A sponsor can also complete these same edits under the "NCERS Update Account Details" option.
7. **Individual Profile** – This option will allow you to edit your **INDIVIDUAL** information. An individual can update their name, their work address, phone number, and password. It is important to note information changed within individual profiles will not update the company record.
8. **Join NAB** – This will allow you to join NAB as an **INDIVIDUAL** member. Please choose the "NCERS Homepage/Third Party Certification Program" option to pay your provider initial or renewal membership fees.
9. **Pay Invoices/Renewals** – This lists payments that are outstanding to NAB. **PLEASE NOTE: This is NOT where you would renew your NCERS Sponsor membership.** To review program payments or to pay to renew your sponsor membership, please visit the NCERS Homepage and choose the My Account option.

## E. ADD A NEW EMPLOYEE (SYSTEM ADMINISTRATOR) TO YOUR SPONSORSHIP ACCOUNT

As changes occur within your organization, it is crucial to update your company record within the NAB system. All employees should maintain their own individual logins. Employees added to your company's account will allow these individuals the capability to:

- Pay annual sponsorship membership fees.
- Add, edit, and submit courses and report attendance.

- Add additional speakers to the account.
- Report CE credits to NAB's CE registry.

In order to terminate an employee's access to the NCERS system, add an employment end date under the "NCERS Sponsor – Manage Employees Contact" section of the NABVerify system. This will not terminate access to a personal CE Registry if company access is removed.

In order to add a new employee to a company account within NABVerify, a current administrator listed within the company account will need to email NAB at [nab@nabweb.org](mailto:nab@nabweb.org). Please include the person's name and email address as this will be used to create the new employee account. New employees can only be added after they have [signed up for a NABVerify Account](#).

## F. CHANGING YOUR ACCOUNT'S CONTACT INFORMATION

Company administrators have the capability to update an organization's contact information. This should be updated if a new individual should receive the automated emails from the NABVerify system (*e.g. program updates, approval codes, fees, etc.*).

To change the contact information on a company account, a current account administrator must log into <https://www.nabweb.org/manage-my-account> with their credentials and click on "Company Profile" on the Manage My Account page.

### Company Profile

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<b>Company Name:</b>  <b>Work Address:</b>  <b>Work Phone:</b>  <b>Website:</b>  <b>Email:</b>	<p>A form will appear with the current contact information, address, phone, website, and email where all automated communications will be sent. If a new email address should be used for communications, please click on the Edit button, make any necessary updates, and then click Save.</p>
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## G. END AN EMPLOYEE'S ACCESS TO YOUR COMPANY'S ACCOUNT

If an employee should no longer have access to your account as a company administrator, an end date can be added to prevent access to your NABVerify account beyond that date. This will not prevent a former employee from accessing their personal CE Registry or HSE application.

In order to terminate employee access, log into <https://www.nabweb.org/> with your credentials and click on "NCERS Sponsor – Manage Employee Contacts."

## Manage My Account

Share/Print Page: [f](#) [t](#) [e](#) [p](#)

*If you are viewing this information on a mobile device you may find that the login process to access the "Members Only" section will work better if you use your desktop or laptop device instead.*

[NCERS Homepage](#) [Third Party Certification Programs](#) [NCERS Update Account Details](#)  
[NCERS Sponsor - Manage Employee Contacts](#) [HSE Application](#) [CE Registry](#)  
[Individual Profile](#) [Company Profile](#) [Join NAB](#) [Pay Invoices/Renewal](#) [NAB 2018](#)  
[Mid-Year Meeting](#) [Log Out](#)

A list of all employees will appear. Please click on the person's name whose access you want to terminate.

Employee Start Date

Employee End Date

You will see the form with their name and email. Please enter an end date when access should be terminated and click Save.

### 3 NAVIGATING THE NCERS HOMEPAGE

Once a sponsor has logged in on the NAB website and clicked on the "NCERS Homepage" link, you will automatically be redirected to the NCERS Sponsor homepage. Most of the work in regards to creating programs, reporting attendance, and running reports will be completed on this site. The NCERS sponsor homepage contains several links in which sponsors will find useful.

Once you have logged in and selected the option to access the NCERS Homepage, you will see the following. You can also access this page by hovering your mouse over the "Sponsor" tab at the top of the page and clicking on Programs.

**NAB** NATIONAL ASSOCIATION OF LONG TERM CARE ADMINISTRATOR BOARDS

Welcome [My Account](#) [Logout](#) ?

[Application / Registry](#) [Sponsor](#)

### Programs

As a provider of education through NAB, you can do the following:

- View all Programs by clicking [here](#)
- Manage Speakers by clicking [here](#)
- View expiring Programs by clicking [here](#)
- Look up and export a list of NAB Registry ID Numbers by clicking [here](#).
- Get a list of all programs and additional sites [here](#)
- **Get a list of all programs for which you have not yet reported attendance [here](#)**
- Pay NCERS Annual Sponsor Membership Fees by clicking [here](#)

To report No Attendance for a course, please click on the gear button to the right of the course and select "No Attendance."

Attendance can be reported at any time after a program has been completed.

**Please change Status to All when searching for a program.**

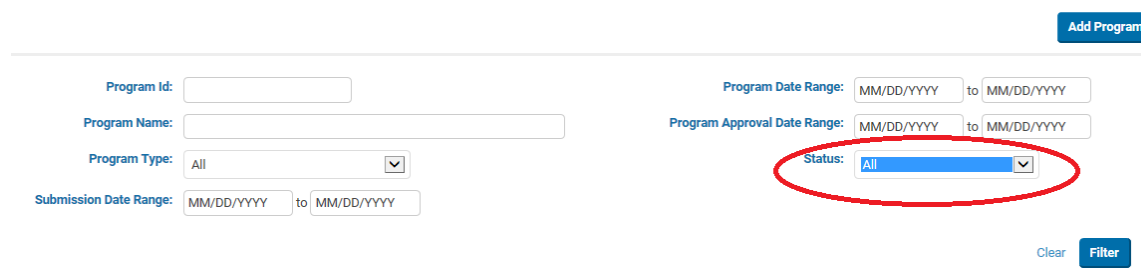
[Add Program](#)

The Programs homepage feature allows Sponsors to navigate the different areas of the site with ease through the use of hyperlinks. You can view all programs, add/manage speakers, pay your annual dues, and even receive a report listing all programs for which you have not yet reported attendance through the CE Registry. At the bottom right, you will notice a blue button that read's "Add Program". This is where you will start your new program submission.

## A. HOW TO SEARCH FOR A PROGRAM

Below the homepage's site navigation, you will see sort options to search for a specific program. The options on the search page allow you to look up courses by program ID, name or keywords, or even program type such as in person or distance learning. A Program ID is a unique ID assigned to all program applications within the system. For any programs that are in process or in review, the program ID will start with the letter "A" followed by 5 numbers. Once a program has been approved, the program ID will match the NAB approval number. The unique code above will be a part of the NAB approval number so you may still use this to search for approved programs. Program ID numbers allow sponsors to search their entire program directory (*distance learning programs, in person programs, and additional sites*). The Status search feature will allow sponsors to sort by the state of review the program is in currently. The search options include the option to search 1) all programs, 2) pending programs (*including the ones in review*), or 3) completed programs (*including all programs that have been approved/denied*).

**It is crucial to ensure that the "Status" search feature is set to the "All" status in order to search the entire course database.** Once you have chosen the search feature applicable to a specific program, click on the blue "Filter" button



The screenshot shows a search form with the following fields:

- Program Id:
- Program Name:
- Program Type:
- Submission Date Range:  to
- Program Date Range:  to
- Program Approval Date Range:  to
- Status:

Buttons: [Add Program](#), [Clear](#), [Filter](#)

Below the program search section is where current programs will appear. If you perform a search, this will also be where the search results are returned.

<a href="#">Program Id</a>	<a href="#">Program Name</a>	<a href="#">Program Type</a>	<a href="#">Program Date</a>	<a href="#">Sponsor Name</a>	<a href="#">Submission Date</a>	<a href="#">Program Approval Date</a>	<a href="#">Media Type</a>	<a href="#">No Attendance</a>
	↑							

[Add Program](#) [Filter](#) [Settings](#)

The button next to the course listing will contain different language/colors depending on the current status of the course. The most common buttons are:

- Enter Program Details
- Enter Additional Site
- Pay Fees
- Approved

- Denied/Withdrawn

The following information will be listed for each course is listed in the program search section:

- **Program ID** – For courses in progress, the Program ID will start with “A”, followed by 5 digits. It is a unique system number that is different from the NAB approval number. This number will allow sponsors to search for programs. Once a course is approved the Program ID will be in the following format: **YYYYMMDD-hrs-A12345-IN or DL**. This approval number represents the following information about the program:
  - ✓ **YYYYMMDD** – This represents the date that the program will expire.
  - ✓ **hrs** – This number represents the total program hours that are approved. Participant hours might be lower than this number if breakout sessions are part of your program.
  - ✓ **A12345** – The third number represents the original Program ID automatically assigned to a specific program application when it was created.
  - ✓ **IN or DL** –The IN stands for an In Person course and DL indicates a Distance Learning course.
- **Program Name** – This is the name a sponsor has titled the program when creating the record.
- **Program Type** – Four program types are listed in this field:
  - ✓ In Person
  - ✓ In Person – Additional Site
  - ✓ Distance Learning
  - ✓ Distance Learning – Additional Site.
- **Program Date** – This lists the scheduled date the program is to be held. This can be one date or a range, if the program is a multi day event or a distance learning self-study course.
- **Sponsor Name** – Your company’s name.
- **Submission Date** – This notes the date the course was submitted for approval.
- **Program Approval Date** – The date the course was approved.
- **Media Type** – This lists the type of distance learning course being offered. Please review the [Select your Media Type section](#) for more information on various media types.
- **No Attendance** – This sections provides reporting information for the CE Registry. If it says Yes in this column it means you have reported “no attendance” to this course.

## 4 SUBMITTING A CONTINUING EDUCATION PROGRAM

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NAB defines Continuing Education (CE) programs as any programs which will enhance an administrator’s continuing competencies while covering content beyond that obtained within a basic entry level educational program.

In order for programs to be considered for NAB CE approval, subject matter must:

- relate to long term senior living and health services administration.
- promote continued knowledge and skill(s) within the NAB Domains of Practice.
- have been developed by the sponsor organization offering the CE program or CE Sponsor has explicit approval from the content owner to present the program content.

The following programs/events are **NOT** eligible for NAB CE credit:

- Membership and/or volunteering within an association
- Board or Committee meetings
- Trainings, company meetings, or any event that deals with the internal affairs of the organization

- Trainings in which the specific purpose is to provide commercial promotion of specific products and services. \*
- Preceptorship of an Administrator in Training (AIT) \*\*
- Self-Study programs that **DO NOT** have an evaluation of participant learning (e.g. *posttests*)
- Programs which offer more than eight (8) CE hours within a 24 hour period. (*Multi-day conferences and self-studies which exceed this limit are permitted as long as the CE provider can demonstrate learning occurred over several days.*)

*\* Sponsored Programs are permitted and a sponsoring organization is allowed to provide promotional material. However, any commercial promotion of a specific product or service must be deducted from the overall CE totals being offered.*

*\*\* Many states offer renewal credits to those administrators serving at preceptors. However, this is not eligible for NAB credit. Please contact your state licensing board directly in order to determine preceptorship renewal options. State contact information can be found at <https://www.nabweb.org/state-licensure-requirements>.*

Types of continuing education programs include:

- In Person – see [ENTERING AN IN-PERSON PROGRAM](#)
- Distance Learning – see [ENTERING A DISTANCE LEARNING PROGRAM](#)
- Self-study – Self-studies require a post-test (Archived Webinars, Printed Material, and Pre-recorded digital media). See [Digital Media](#) and [FOR SELF-STUDY PROGRAMS](#)
- Live Web Events (Live Webinars and Virtual Conferences). See [Live Webinar/Teleconference](#)

If offering a private (corporate) event, NAB suggests that the following statement be added to the program advertisement. Additionally, please review the information regarding [CORPORATE \(PRIVATE\) PROGRAM ACCEPTANCE BY STATE BOARDS](#).

*“This program is approved as a Corporate (Closed/Private) program for xxx CE. It is pertinent to note that not all states accept programs that are closed/private. For more information regarding state requirements, please visit [www.nabweb.org/state-licensure-requirements](http://www.nabweb.org/state-licensure-requirements). Any comments can be sent to [nab@nabweb.org](mailto:nab@nabweb.org).”*

## A. PROGRAM TIMELINES AND FEES

The recommended timeframe for all program’s applications submitted by non-certified sponsors is 60 days prior to your scheduled program date. This timeframe allows the sponsor to obtain the maximum advertising benefits of their program on the [NAB Approved CE Database](#). In order to be added to the [NAB Approved CE Database](#), CE programs are required to be open to the public and approval for CE credits must be obtained.

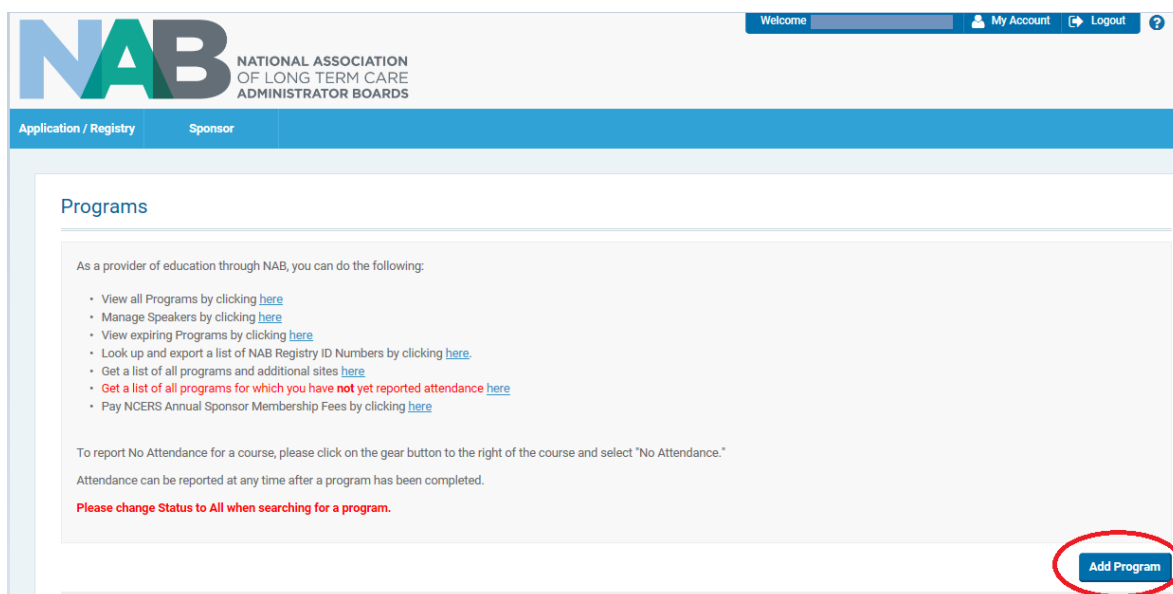
Any program application submitted less than 45 days in advance of the requested approval date requests will incur a late fee (*a minimum of 3 days for certified sponsors*). All programs must be submitted through the NAB NCERS online application system in order to be reviewed. A late fee of \$400 will be applied to the sponsor’s program application in addition to the regular program fees. If a sponsor chooses to remit payment by check, this should be paid within 10 business days of submission date (*unless alternate arrangements are made*). All program payments not received within this timeframe will be returned to the sponsor and late fees will be applied if applicable. **All fees are non-refundable, even if program is denied.**

Due to the volume of program applications received, any obtained less than 15 days prior to the requested program start date may be delayed and/or rejected.

## B. ENTERING AN IN-PERSON PROGRAM

Prior to beginning a new program application, NAB recommends that sponsors enter all speakers that will be associated with your event. (Please see [ADDING SPEAKERS/ PROGRAM DEVELOPERS](#) for detailed instructions how to enter speakers.) If you begin your program application prior to entering the speakers, please make sure to select “Finish Later” prior to exiting the program application.

After entering the speakers, return to the NABVerify homepage by clicking on the NAB logo and choose the “Add Program” button.



Please add the unique program title in the top field and then click “select” next to **In Person**. Each program within your account will need to have a unique name.

**Add Program**

Program Name\*:

Sponsor\*:

**Program Type**

**Distance Learning**  
Distance Learning can be printed material, web-based, digital media, teleconference or webinar. Live webinars are considered distance learning. Select

**In Person**  
In-Person is defined as being within the same physical location as the speaker/trainer. Select

Once you select your program type, you will be able to access the program application where program details are entered. The following information is required:

1. **Program Title:** The program name entered on the previous page will auto populate this field. If you choose to update this within the application, it will update it throughout the application.
2. **Public or Private program:** If you are a Corporate 10 or Corporate Unlimited sponsor, you will be given the option to enter private programs. (Please see [Private Programs](#) definition.)
3. **Domains of Practice:** Please choose the domains that will be covered within your program
4. **Program Description:** This is a detailed description of the overall purpose of the program.
5. **Speakers:** If the speakers were added to the speaker database prior to beginning the program application you can just type the first few letters of their first name and click on the speaker you would like to add from the dropdown menu. (Please see [ADDING SPEAKERS/ PROGRAM DEVELOPERS](#) for detailed instructions how to enter speakers.)
6. **Total Program Hours** – Total program hours are a summation of all hours of education content. All breakout session hours are counted separately (e.g. a program with 5 sessions held from 8 am – 9 am would be 5 total program hours.)
7. **Total Participant Hours** – Participant hours are the maximum number of educational hours any one participant can attend. If you have breakout sessions, only one of these courses is counted in participant hours (e.g. a program with 5 sessions held from 8 am – 9 am would be 1 participant hour.)
8. **Program Agenda:** All NAB sponsors are required to use the [NCERS Approved Agenda](#) template. Detailed instructions on how to complete the agenda can be found within the program template.
9. **Supplemental Documentation:** This is optional and should be used only if additional information is needed for NAB reviewers to effectively evaluate your program.
10. **Learning Objectives:** Please provide clear learning objectives for the program. It is recommended that one day programs have a maximum of three learning objectives. Multiday day programs should have 3-5 learning objectives. For more information on writing measurable objectives, review [Bloom's Taxonomy](#) and [S.M.A.R.T Goals/Objectives](#) within the provider resources section of this handbook.

11. **Relevance:** Describe the program relevance to Home and Community Based Services Executives (HCBS), Resident Care/Assisted Living Administrators (RCAL) and/or Nursing Home Administrators (NHA).
12. **Attendance Verification Method:** Select your attendance verification method as well as agree to report to the CE Registry within 30 days of the program end date.
13. **Requested Approval Start Date:** Please note the first date in which you plan to hold the program/event. If it is a self-study, what is the date in which you will begin to offer CE credits. Please note: Programs must be submitted 45 days in advance, or you will be charged a nonrefundable \$400 late fee if you are a noncertified sponsor member of the NAB.
14. **Registration Web Link:** These web links are optional and can be used if desired. If a registration web link is added, you will be charged an additional \$70.00 fee.

The next section of the application will ask you to enter the media details of the program. For in-Person programs, you will be asked if there are additional information/resources to be mailed. If you select yes, your application will not be sent out to NAB reviewers until this information is received.

The final portion of the application will ask you to enter informational details about the initial program site. All program sites must be entered **prior** to the program submission. The site start date cannot be before the Program Approval Start Date, after the Program Expiration Date, or after the Sponsor Expiration Date.

**IMPORTANT:** If you intend on holding this course multiple time during the year, please enter the FIRST date you will hold the course. Once this program is approved, you can add Additional Sites for a nominal charge. Additional sites are required to be added for any repeated in person programs, live webinars, or virtual conferences as each site/date must have its own NAB ID.

The following items are required on this page:

1. Site Start Date – the first day of your program
2. Site End Date – the last day of your program

If you do not enter the exact start and end date for this location, you will receive errors when uploading administrators credits to the CE Registry. You are also required to complete the following information about the program site.



3. Location/Site Name
4. Address
5. City
6. State
7. Zip Code

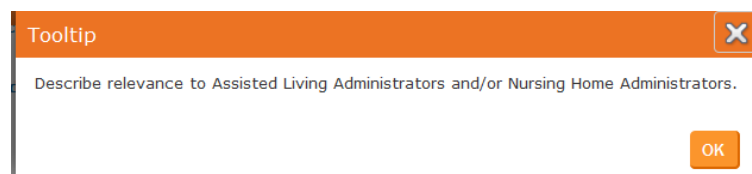
Once the site information has been completed, you will be directed to the program payment page to pay all fees. Once all fees are paid, programs are initially reviewed by the NAB staff to confirm that all elements of the program application have been completed correctly. Following this, your program will be assigned to three NAB program reviewers to evaluate the overall content to be presented. NAB program reviewers are given 2 weeks to complete their evaluation of the program. Please note that if any additional information is required, programs

will be returned to the sponsor for that information. If a site changes after a program is approved, please contact NAB at [nab@nabweb.org](mailto:nab@nabweb.org) to make this change. All sites need to be correct by the date of the program.

**PLEASE NOTE:** If you are a certified sponsor, you may omit certain application criteria. **For more information on items that may be omitted or information on how to become a certified sponsor, please visit [NCERS CERTIFIED SPONSOR INFORMATION](#).**

## **Relevance\*:**

Throughout the application, sponsors will see the “” beside select items. Upon clicking on this “” (*highlighted*), a Tooltip will be displayed to further assist sponsors in filling out program applications.



## C. FILLING OUT NAB APPROVED PROGRAM AGENDA

All sponsors are **required** to submit their program outline within the [NAB Approved Program Agenda](#). This agenda will calculate total program and participant hours\* that are entered into the application.

*\*Participant hours will only be calculated if the main conference track is entered within the first section of the agenda template. If submitting a multitrack program, please enter all sessions within the first track and only enter the additional breakout sessions within the additional tracks.*

If the [NAB Approved Program Agenda](#) is not used, the program will be returned to you to complete the agenda in the correct format.

**PLEASE NOTE:** Per NAB policy, a program session may not be any longer than two hours without including the time for a 15-minute break. Breaks do not have to be entered into the agenda, but time MUST be allotted. If a program is an all-day event, please include a minimum of 30 minutes for a lunch break. In Person programs are limited to awarding a maximum of eight (8) CE hours. Programs that do not follow these guidelines will be returned, delaying the review and approval process.

The following information will need to be added to the [NAB Approved Program Agenda](#):

1. **Session Name(s)** - Please enter the name of all sessions being offered. The session name must match the title from the conference program or advertising material.
2. **Session Start Time** - Please enter your session start time. Session times cannot be longer than 2 hours and concurrent sessions cannot be longer than 2 hours without a 15-minute break. For full day programs, please include a minimum of 30 minutes for lunch. The 30 minutes for lunch cannot be counted for CE (*e.g. working lunches*). Start times need to be on the quarter hour. (*e.g. 12:00 pm, 12:15 pm, etc.*)
3. **Session End Time** - Please enter your session end time. Session times cannot be longer than 2 hours and concurrent sessions cannot be longer than 2 hours without a 15-minute break. For full day programs,

please include a minimum of 30 minutes for lunch. The 30 minutes for lunch cannot be counted for CE (e.g. *working lunches*). End times need to be on the quarter hour (e.g. *12:00 pm, 12:15 pm, etc.*).

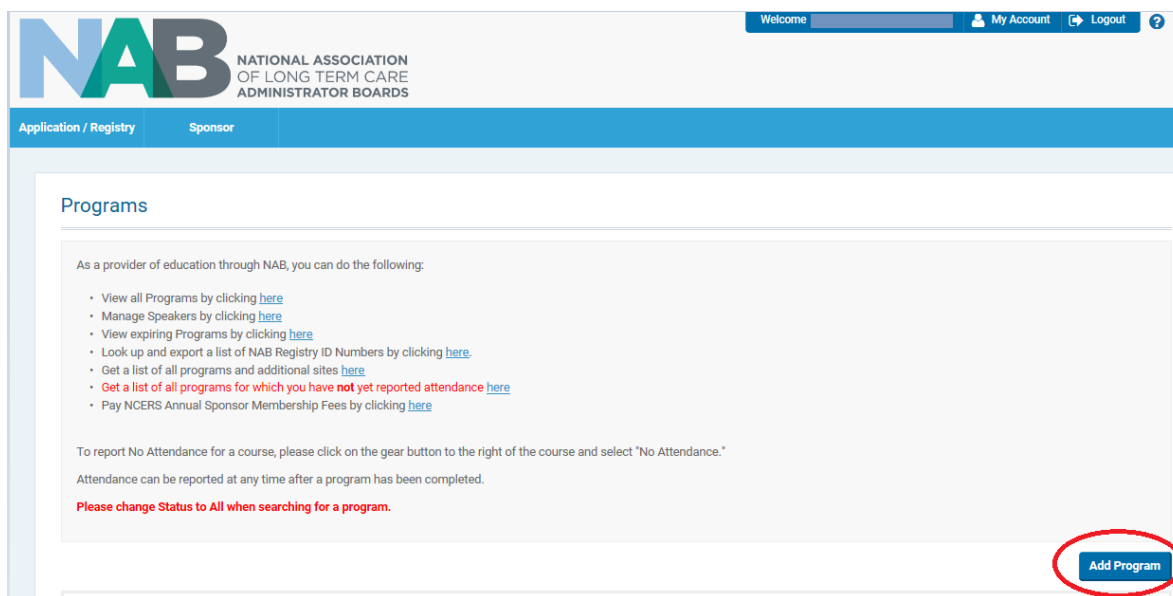
4. **Session Date** – Please list the date in which the program is occurring for both one day and multiday programs.
5. **Track/Concurrent Session** - Please enter all sessions within the same track into the first grid, as this is how you will calculate your participant hours. If you have concurrent sessions at the same time, please use the additional grids. You can label them Track 1, Track 2, Track 3, etc.
6. **CE Hours Requested** - List the CE hours you are requesting. You must have a break per 2 hours of CE. For full day programs, please include a minimum of 30 minutes for lunch. The 30 minutes for lunch cannot be counted for CE (e.g. *working lunches*). Also, all CE hours must be calculated to the nearest quarter hour (e.g. *11:15 - 12:45 would be 1.5 CE*). The **TOTAL** number of CE hours requested will be calculated at the bottom of the spreadsheet. These are the hours that will need to be entered into the **TOTAL PROGRAM HOURS** field within the NCERS System. Please do not count breaks, lunches, receptions into the total program hours. **PARTICIPANT HOURS** are the maximum total hours any attendee can earn. If you do not have a multitrack program, your program hours and participant hours will be the same.
7. **Session Description** - Please include the full session description. This is mandatory for standard sponsors and optional for certified sponsors.

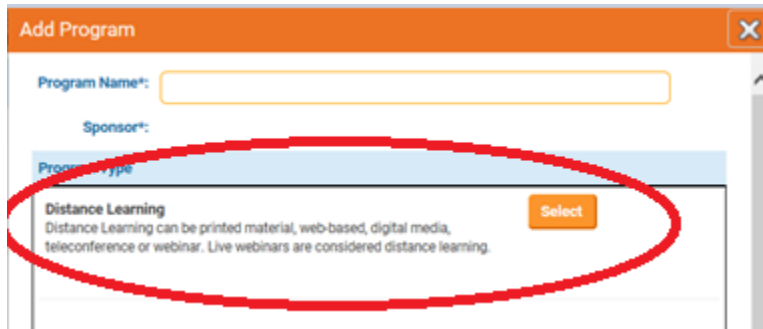
## D. ENTERING A DISTANCE LEARNING PROGRAM

Prior to beginning a new program application, NAB recommends that sponsors enter all speakers that will be associated with your event. (Please see [ADDING SPEAKERS/ PROGRAM DEVELOPERS](#))

If you begin your program application prior to entering the speakers, please make sure to select “Finish Later” prior to exiting the program application.

After entering the speakers, return to the NABVerify homepage by clicking on the NAB logo and choose the “Add Program” button.





Please add the unique program title, in the top field and then click “select” next to **Distance Learning**.

Once you select your program type, you will be able to access the program application where program details are entered. The following information is required to be completed within the application:

1. **Program Title**: The program name entered on the previous page will auto populate this field. If you choose to update this within the application, it will update it throughout the application
2. **Public or Private Program**: If you are a Corporate 10 or Corporate Unlimited sponsor, you will be given the option to enter private programs.
3. **Domains of Practice**: Please choose the domains that will be covered within your program.
4. **Program Description**: This is a detailed description of the overall purpose of the program.
5. **Media Type**: For distance learning programs, Providers/Sponsors must select at least one Media Type. Providers/Sponsors have the following four media types to select from when applying for programs:
  - **Printed Material** – This option should be selected for any printed programs. (*e.g. book studies*). Please note that all printed material should be calculated on 12,000 words = 1 CE hour. **Additionally, these programs must include a posttest which contains five questions per hour of CE requested. The system will automatically calculate and add a quarter hour of additional credit per two CE hours of instructional time to allow for completion of the posttest.** Please review NAB’s [intellectual property use](#) policy to determine if your program has met these guidelines.
  - **Web Based/Pre-Recorded Program** – This option should be selected for programs that are archived webinars prerecorded from live events. All Web Based/Pre-Recorded Programs must include a posttest, which contains five questions per hour of CE requested. The system will automatically calculate and add a quarter hour of additional credit per two CE hours of instructional time to allow for completion of the posttest.
  - **Digital Media** – This option should be selected for programs that are audio video, or multimedia productions. This option should be chosen for any other media other than a webinar that meets the definition of [Self-Study](#).
  - All Digital Media programs must include a posttest which contains five questions per hour of CE requested. **The system will automatically calculate and add a quarter hour of additional credit per two CE hours of instructional time to allow for completion of the posttest.**
  - **Live Webinar/Teleconference** – This option should be selected for programs that are live and have a set date/time. All attendees should be present within a phone conference or a webinar setting. It is necessary that all live webinars/teleconference provide a mechanism to measure engagement (*e.g. polling questions*). If this educational event occurs more than once, an additional site must be added. (Please see [ADDING ADDITIONAL PROGRAM SITES](#).)

*After selecting a media type, the application will be tailored to gather needed information based on that choice.*

6. **Speakers:** If the speakers were added at the beginning of the application, you can just type the first few letters of their first name and click on the speaker you would like to add from the dropdown menu. (Please see [ADDING SPEAKERS/ PROGRAM DEVELOPERS](#) for detailed instructions how to enter speakers.)
7. **Supplemental Documentation:** This is optional and should be used only if additional information is needed for NAB reviewers to effectively evaluate your program.
8. **Learning Objectives:** Please provide clear learning objectives for the program. It is recommended that one day programs have a maximum of three learning objectives. Multiday day programs should have 3-5 learning objectives. For more information on writing measurable objectives, review [Bloom's Taxonomy](#) and [S.M.A.R.T Goals/Objectives](#) within the provider resources section of this handbook.
9. **Relevance:** Describe the program relevance to Home and Community Based Services Executives (HCBS), Resident Care/Assisted Living Administrators (RCAL) and/or Nursing Home Administrators (NHA).
10. **CE Reporting Requirement:** Select that you agree to report to the CE Registry within 45 days of the program completion.
11. **Reviewer Web Link:** This web links option is provided to share the entire program content with the NAB reviewers. This link will only be seen by NAB reviewers and not share with the public audience. reviewer instructions area or on the subsequent media information page(s).
12. **Requested Approval Start Date:** Please note the first day in which you plan to hold the program/event. If this is a self-study, please note the first date you plan to offer program for CE credits. Please note: Programs must be 45 days in advance or you will be charged a nonrefundable \$400.00 late fee if you a noncertified sponsor member of the NAB.
13. **Registration Web Link:** These web links are optional and can be used if desired. If a registration web link is added, you will be charged an additional \$70.00 fee. If reviewers will need a link to your program site to evaluate your program, please add this in the reviewer instructions area or on the subsequent media information page(s).

The next section of the application will ask you to enter the media details of the program. Depending on the media type selected will determine which of the following information will need to be entered:

1. **Hours Rationale** – All distance learning media types will require this information. Please provide 2-3 sentences containing justification for the hours being requested for the program.
2. **Media Type** – Please check that the media type selected is correct. If submitting a distance learning course, a minimum of one media type should be selected. If this is incorrect, please click the blue “Back” button to return to the first part of your application and update this information
3. **URL** – The URL is required for web-Based/Pre-Recorded Programs so NAB reviewers can effectively evaluate the course material. URLs for live webinars and digital media are optional but should be submitted if required to participate.
4. **Login/Password** – The URL is required for web-Based/Pre-Recorded Programs so NAB reviewers can effectively evaluate the course material. The login/password for live webinars and digital media are optional, should be submitted if required to participate
5. **Credit Hours** – Please document the actual run time to complete the live or web-based/pre-recorded program. If your course is printed material (e.g. magazines, book studies, etc.), NAB requires that credits are documented based on word count using the following calculations:
  - a. 12,000 words equals 1 credit hour
  - b. 3000 words equals .25 credit hour

- c. Round down to the nearest quarter hour  
Digital media course hours can be calculated using word or run time information.
6. **Posttest** – This is required for any distance learning program with the exception of live webinars. Posttests should have a minimum of five questions per hour of credit requested. The system will automatically calculate a quarter hour (.25) of additional credit per two CE hours of instructional time to allow for completion of the posttest.
7. **Mailed Documentation** – Please note if additional information will be sent to the NAB office. It is preferred that all documentation is submitted electronically if possible, to [nab@nabweb.org](mailto:nab@nabweb.org) as this will expedite the review process. Supplemental documentation (e.g. posttests, program manuals, etc.) should be uploaded within the program application. Should a document need to be mailed to the NAB office, please mail it to the following address:

NAB  
1120 20th Street, NW, Suite 750  
Washington, DC 20036

**PLEASE NOTE:** If you intend on holding a live webinar multiple times during the year, please enter the FIRST date you will hold the course. Once this program is approved, you can then add Additional Sites for \$10 additional charge. Each site/date must have its own NAB ID. Recorded webinar must be submitted as a separate program application.

Once the program media information has been completed, you will be directed to the program payment page to pay all fees. Once all fees are paid, programs are initially reviewed by the NAB staff to confirm that all elements of the program application have been completed correctly. Following this, your program will be assigned to three NAB program reviewers to evaluate the overall content to be presented. NAB program reviewers are given 2 weeks to complete their evaluation of the program. Please note that if any additional information is required, programs will be returned to the sponsor for that information. If a site changes after a program is approved, please contact NAB at [nab@nabweb.org](mailto:nab@nabweb.org) to make this change. All sites need to be correct by the date of the program.

**ALL DOCUMENTS MUST BE RECEIVED BEFORE A PROGRAM CAN BE SENT FOR REVIEW.**

**PLEASE NOTE:** The fields that you are responsible for filling out will differ based on your sponsor status (*certified sponsors may omit certain items from the application*). For more information on items that may be omitted by certified sponsors or information on how to become a certified sponsor, please visit [NCERS CERTIFIED SPONSOR INFORMATION](#). Items that are marked with an asterisk are NOT all required for certified sponsors.

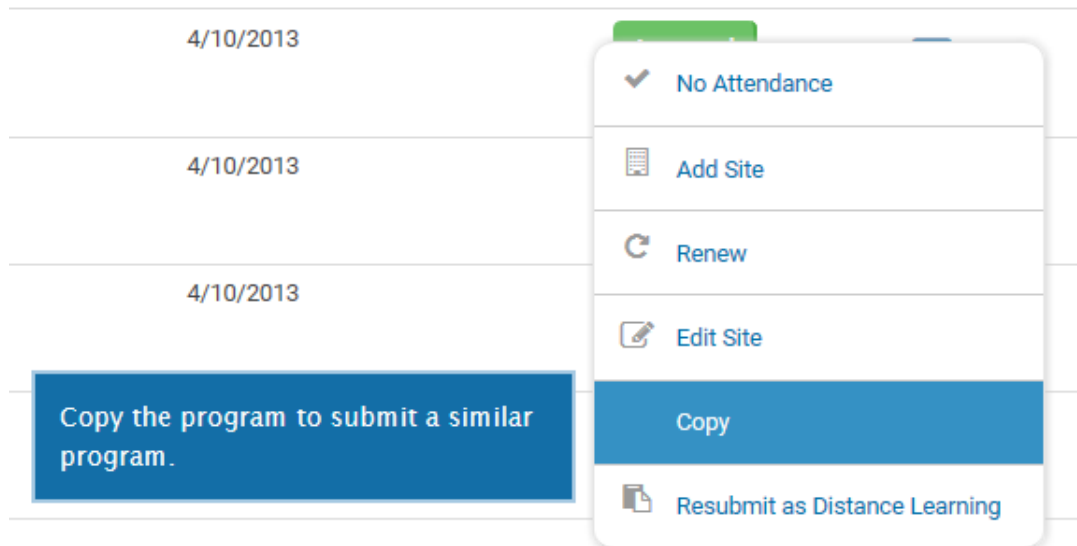
## E. CREATING A COPY OF AN EXISTING PROGRAM

If a program is similar to an existing application within the sponsor account, a copy can be created to eliminate the need to reenter the entire application.

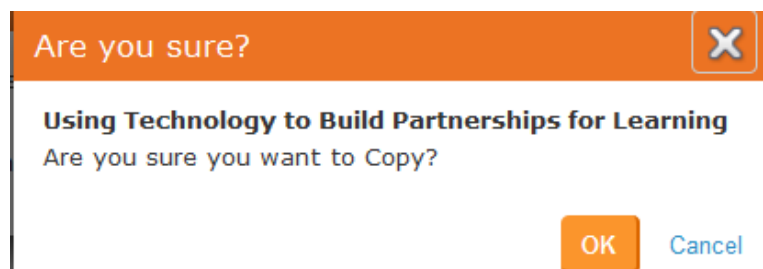


To copy a program application, click on the gear icon within your account.

The status of the program will determine the options the Sponsor can see when clicking on the gear button. In order to make a copy, please select Copy after clicking on the gear button. Whether Approved or In Progress, sponsors can choose to select Copy to make a duplicate of an existing program application.



The Sponsor will then be prompted to verify they selected the correct program to copy.



Once choosing to copy a program, please rename with a unique title and verify all information is correct and not related to the previous program prior to submission, including attachments.

## F. RENEWING AN EXISTING PROGRAM

Both Distance Learning and In Person programs may be renewed 90 days prior to their expiration date. **Programs may not be renewed one year after expiration.**

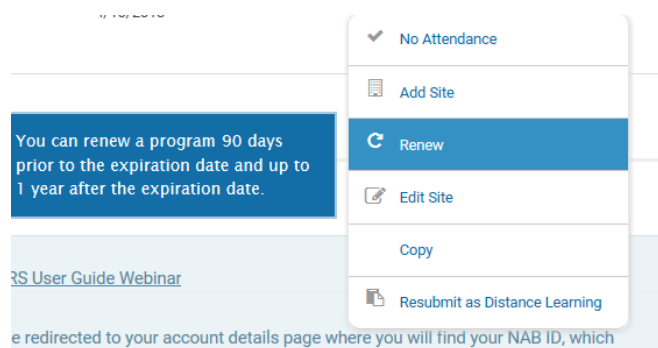
When a Sponsor renews a program prior to the expiration date, the new date will be one year from the original date of expiration. When a Sponsor renews a program after the expiration date, it will renew on the date of the application submission.

**NOTE:** If you are a certified sponsor, programs must be renewed **three days prior** to the program start date without incurring a late fee. For standard and corporate sponsors, programs **must** be renewed **ten days prior** to the program start date without incurring a late fee.

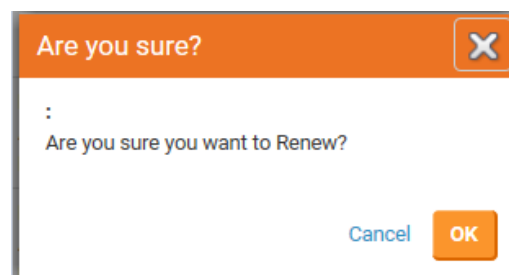
To renew an existing program, choose the gear icon next to an approved program within the 90-day renewal window or after the program expiration date. (**PLEASE NOTE:** Program late fees do apply with renewals.)



Then select Renew from the drop down box.

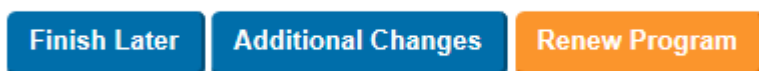


It will ask you if you are sure you want to renew. Please click OK.



When renewing a program, only select changes are allowed, including:

- Program Title
- Registration Web Link
- Contact Email
- Speakers



Once all allowed changes are made, select the “Renew Program” button. If additional changes are needed, select the “Additional Changes” button. If this option is chosen, and

the company is not a certified sponsor, the program will be sent out for a full review and will have to be submitted 45 days in advance of the program start date.

## G. ADDING ADDITIONAL PROGRAM SITES

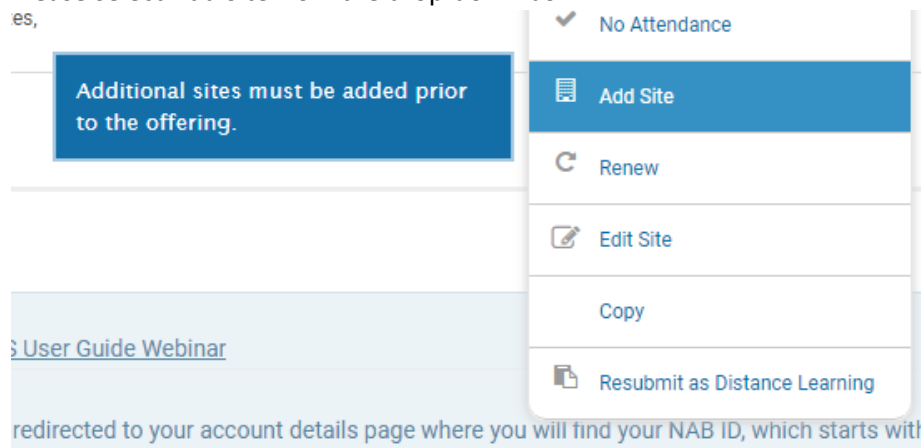
If you are holding the exact same program on a different date and/or at a different location, an additional site may be added for a nominal fee.

Please see [NAVIGATING THE NCERS HOMEPAGE](#) on how to search for approved programs within a program site. Choose “All Programs or “Completed Programs” to access approved programs.

An additional site can only be added to an In Person course, not an In Person – Additional Site course. Once a program is marked as approved, click on the gear icon within the Sponsor account to add a site.



Please select Add Site from the drop-down box.



It will ask you if you are sure you want to renew. Please click OK.

Please update all the mandatory fields as it relates to the additional site, including the site start date, site end date, location, and address, and then click the “Next” button.

**Please Note:** The site end date cannot be after the program expiration date.

Once completed, you will be directed to the “Pay Fee” option. All additional sites fees are \$10. Once payment is completed, the additional site will be automatically approved and available within your sponsor account.

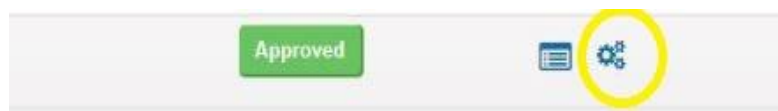
Program approval numbers will be different for each site so any programs occurring on different dates OR at a different location will need to be submitted as an additional site.

## H. RESUBMITTING A PROGRAM AS A DISTANCE LEARNING COURSE

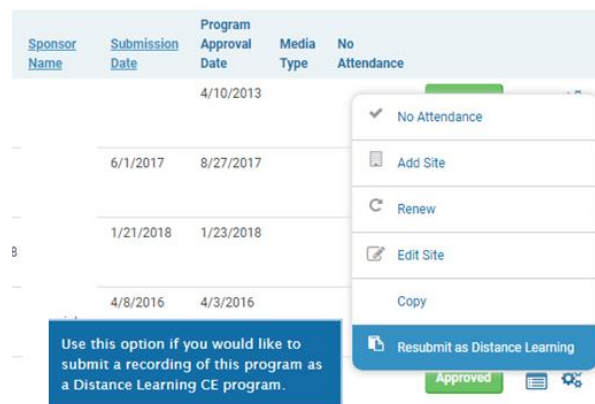
An in person program that has been approved can be copied and resubmitted as a distance learning course type.

Please see [NAVIGATING THE NCERS HOMEPAGE](#) on how to search for approved programs within a program site.

Once you have found the program to be resubmitted as distance learning, click on the gear button next to the course.



Next, select Resubmit as Distance Learning.



You will be asked if you are sure. Please click OK.

The program details page will appear, with most of the program information copied for you. Edits can be made to the original program application. In addition, you will need to enter information related to the media type, confirm that you agree to the attendance reporting agreement, and update the approval start date. Click Next.

On the Enter Media Information page, additional fields will need to be completed, including identifying the credit hours requested and click next. The Pay Fees screen will be available for you to either pay by credit card by clicking “Pay Fees”, or to have an invoice sent if you click “Send Invoice”.

## I. ADDING SPEAKERS/ PROGRAM DEVELOPERS

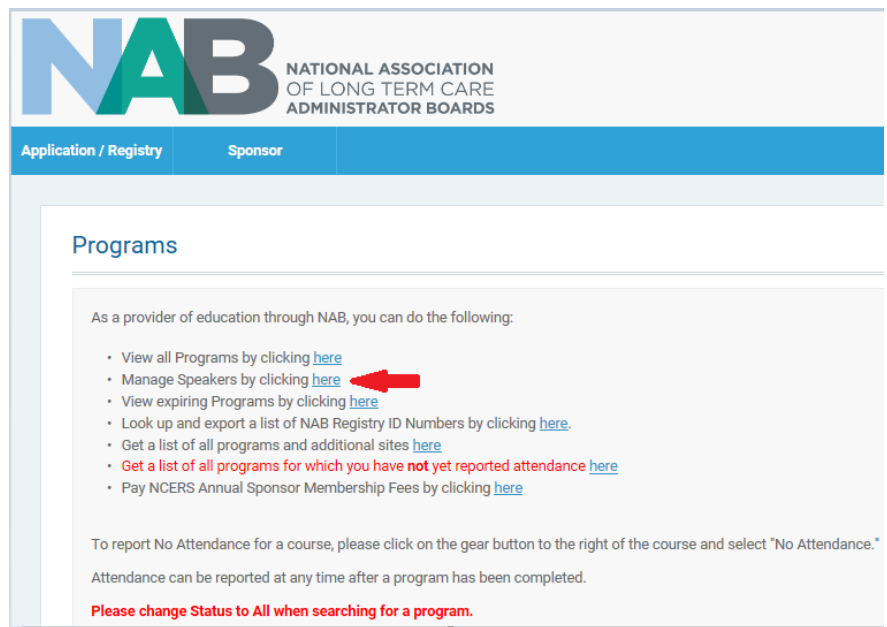
Prior to entering a program, NAB recommended that sponsors add all speakers associated with their program since this information is located outside of the application section.

As part of the submission process, NAB requests speaker information in order to verify qualifications. To be approved to present NAB accredited content, speakers/presenters must have:

- ✓ expertise in the subject matter presented.
- ✓ insight into educational and instructional methods for adult learners.

Speakers that do not meet the above criteria will be requested to provide additional information or will be denied.

To enter a speaker, choose “Manage Speakers by clicking here” from the Programs page. This is also known as the homepage sponsors will see when they first log into their account



If a Sponsor is unsure if a speaker has been added to their database, a search can be done by speaker name.

Speaker ID:

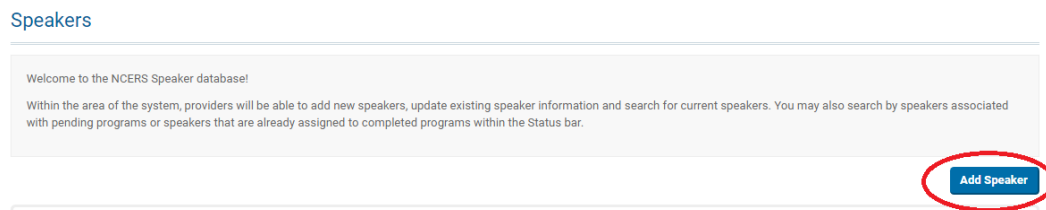
Speaker Name:

Program Type: Speaker

Status: All

Clear Filter

Add a speaker by clicking on the Add Speaker button. Then enter the speaker’s name and click submit.



**Standard Sponsors** will need to provide detailed information regarding speaker qualifications. Please note that Employer, Job Title, Experience, and Academic History (at least one per speaker) are items that are required. Speaker resumes are optional and can be uploaded by clicking on the blue Upload button. Once all information is complete, click the Save button at the bottom of the Enter Speaker form. **Certified Sponsors** need to provide only the first and last name for the speaker. Additional information is optional.

Enter Speaker

**Standard Sponsors:** Please provide the detailed information regarding speaker qualifications. Please note that the **Employer, Job Title, Job Description, Experience, and Academic History** (one per speaker) fields are required. Speaker resumes are optional.

**Certified Sponsors:** Please provide the first and last name of your speaker. Additional information is optional.

**Certified Sponsor:** Yes

**Speaker Name\*:**

**Employer\*:**

**Job Title\*:**

**Job Description\*:**

**Experience\*:**

**Resume:** [Choose from library](#) or Upload

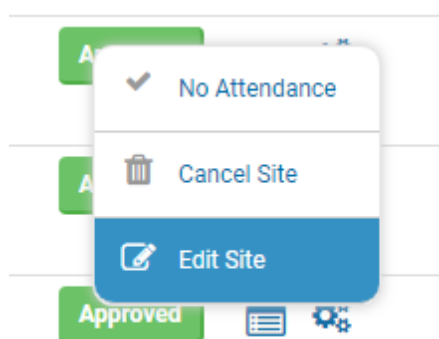
Speakers can be archived if they are no longer used by sponsors. If a speaker is archived, they will no longer show up in the active speakers lists and will not be able to be chosen for applications. See [ARCHIVING AN EXISTING SPEAKER](#).

## J. EDITING COURSE PROGRAM, SPEAKER, AND/OR LOCATION

As a sponsor you can change the speaker and/or location of a program without contacting NAB, as long as the date is in the future.

**PLEASE NOTE:** The topic, objectives, or individual sessions that are part of an in person program cannot be changed.

Please see [NAVIGATING THE NCERS HOMEPAGE](#) on how to search for approved programs within the site. Choose the status “All Programs or “Completed Programs” to access approved programs.



When you have found the course you would like change the location of, please click the gear button and select Edit Site. You will then be able to update the speakers and/or location. Please click Save once you have made any changes. Speakers must have been entered into the speaker database in order to be added to the application.

## K. ARCHIVING AN EXISTING SPEAKER

The NABVerify system offers sponsors the ability to archive speakers who are no longer working with your company. To archive a speaker, begin by entering their name in the search fields and clicking the blue “Filter” button.

---

Speaker ID:

Speaker Name:

Program Type: Speaker

Status:

Clear

A speaker list will be returned in the results area below the search fields. Once locating the speaker in which you want to archive, click on the gear icon to the right of their name and select the “Archive Speaker” option. The system will ask if you are sure. Please click OK.

A speaker can no longer be selected for a program once they have been archived. They will now be listed as Inactive.

To re-active the speaker, click on the gear icon on the right and select “Edit Speaker”. Click Save on the next form and they will be reactivated.

## L. EDITING AN EXISTING SPEAKER’S INFORMATION

To edit an existing speaker’s information, begin by entering their name in the search fields and clicking the blue “Filter” button.

---

Speaker ID:

Speaker Name:

Program Type: Speaker

Status:

Clear

A speaker list will be returned in the results area below the search fields. Locate the speaker in which you would like to update. Please click on the gear button to the right of their name and select “Edit Speaker”. The system will ask if you are sure. Please click OK.

The Enter Speaker form will now appear, and you can edit the information as needed. Make sure you click the “Save” button at the bottom of the page or changes will be lost. Additionally, the speaker’s record will remain in edit mode and you will not be able to add them to program applications.

## M. WHEN A SUBMITTED COURSE IS APPROVED

**Notification of NCERS Application Approval:** Sponsors will receive an email notification once a program review has been completed. If approved, the notification email will contain the official NCERS approval code along with the number of approved hours. Sponsors should use the NCERS approval code along with the NAB CE language found within the email received as well as in this document on all advertising and promotional material. The NCERS approval code will also be used to report attendance to the CE Registry.

Once a course is approved, the Program ID will be in the following format: **YYYYMMDD-hrs-A12345-IN or DL**. Below outlines the various components of what this number represents:

- **YYYYMMDD** – This represents the date that the program will expire.

- **hrs** – This number represents the total program hours that are approved. Participant hours might be lower than this number if breakout sessions are part of your program.
- **A12345** - The third number represents the original Program ID automatically assigned to a specific program application when it was created.
- **IN or DL** – The IN stands for an In-Person course and DL indicates a Distance Learning course.

Program approval codes can change if there is a modification to the program date or program hours. Should the need arise for a new code to be generated, an updated approval message will be sent. To locate all approval messages (*on or after 3/15/16*) sent to your company by NAB, please visit [ACCESSING COMMUNICATIONS SENT FROM NAB](#).

## N. WHEN A SUBMITTED COURSE IS RETURNED OR DENIED

When a course has been submitted for NCERS review, reviewers will return a course to NAB if there is particular questions or something is unclear within the material presented. NAB staff reviews the request and will contact the sponsors through email if necessary.

The most common reasons courses are returned:

- The attached agenda is not in the correct format. (Find the [NAB Approved Program Agenda](#) here.)
- Program session start/end times do not end on a quarter hour.
- Providers have not included the required 15-minute break for every two hours of content.
- Course application has very brief descriptions and NAB reviewers cannot effectively evaluate the content.

### **Notification of NCERS Application Denial:**

Consensus is reached among three NAB program reviewers for all programs that are denied. If a program is denied, a letter is sent to the primary sponsor contact's email notifying them of the program outcome along with the reason(s) behind the denial. If a program is denied, sponsors can submit an appeal within 30 days of receiving the denial notification.

**NAB Program Appeal Process:** If the program is denied or partially approved (*approved for less hours than requested*), the Sponsor has thirty (30 days) from the date that the notice of denial/partial approval was received to appeal the decision. All appeals must be made in writing and document additional information for clarification therefore justifying further review. Once received, an Appeals Panel, consisting of three NCERS reviewers who were not assigned to the original program application, are assigned to review the additional information submitted.

The Appeals Panel may affirm, modify, or reverse the original reviewers' recommendation. Decisions are made by majority vote and will issue its decision in writing within sixty (60) days of the receipt of notice of the appeal from the sponsor. The written decision will include the Appeal Panel's determination, any recommendations, and its rationale for both. **All Appeals Panel decisions are final.**

## 5 AFTER THE PROGRAM HAS BEEN HELD

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As of April 1, 2018, NAB approved CE sponsors are required to report all attendee CE records to the CE Registry **for all NCERS/ NAB approved programs**. It's a sponsor's responsibility to record an administrator's attendance to their CE Registry. While sponsors are requested to report credits as soon as possible (*e.g. 14 days*), it is mandatory for all credits to be reported within **thirty (30) days** from the end date of the educational event. Sponsors are required to attempt reporting of an administrator's attendance a minimum of three times within 45 days, with one attempt being after you have requested they create a CE Registry.

**PLEASE NOTE:** Attendance or "no attendance" must be reported within 30 days of an event or your company could become subject to suspension of program approvals and membership as a NCERS sponsor. Please visit our website to review the current sponsor user agreement.

[https://www.nabweb.org/filebin/pdf/NCERS Provider Sponsor Agreement 181108.pdf](https://www.nabweb.org/filebin/pdf/NCERS_Provider_Sponsor_Agreement_181108.pdf)

If an attendee fails to create a CE Registry after being contacted by the sponsoring company, they assume responsibility for self-reporting the credits. This does not exclude sponsors for reporting credits if an error is received during the upload process. Please see [COMMON ATTENDANCE REPORTING ERRORS AND WHAT THEY MEAN](#) for more information.

### A. RECORD MAINTENANCE

In order to ensure an accurate license renewal process for all long-term administrators, Sponsors agree to retain the following items for a minimum of two years from the date of the program occurrence:

- ✓ Attendance sheets documenting participation for in person courses. (*If using electronic scanners, please retain a digital copy of data received.*)
- ✓ Data to demonstrate how attendance and/or completion of a course was monitored for distance learning courses (*actual copies of posttests do not need to be retained if posttest scores are retained to demonstrate successful completion of a course*).
- ✓ A summary of course evaluation results submitted by program attendees pursuant to NAB's [PROGRAM EVALUATION PROCEDURES](#).
- ✓ A master list of all individuals who participated in the course along with total participant hours earned.
- ✓ An example certificate that was presented to attendees, if course occurred prior to April 1, 2018. Please refer to the NCERS CE Sponsor Handbook for a sample certificate. \*\*
- ✓ \*\* *If a program date occurred on or after **April 1, 2017**, and CE credits have been reported to the NAB CE Registry, certificates are NOT required to be kept for the requisite two years. If individual course attendance has not been reported due to failure in providing a NAB ID number, CE records must be retained, but Sponsors are not obligated to issue a completion certificate to the participant after efforts have been made to obtain the ID. For more information, please see [CERTIFICATE OF ATTENDANCE FOR ATTENDEES](#)*

## B. HOW TO SEARCH FOR A NAB ID OF AN INDIVIDUAL

To verify if someone has a CE Registry and find their correct NAB ID, you can do a search within the NCERS Homepage section of our website.



While on the NCERS Homepage, click on the “Sponsor” menu option (*in the blue bar, under the NAB logo*). Once the drop-down menu appears, please select “Registry Search”.

You can look up a person by their last name to see if they have a registry. A first initial can also be used to narrow down the results. The name being entered must match the name used to create their CE Registry exactly or the individual will not show up in the search result. NAB strongly recommends the use of last names only due to the use of nicknames, abbreviated names, middle names, etc.

### Registry Search

Please use the below search fields and identify all information you have on the licensee to locate their unique NAB ID number. CE records cannot be recorded without the NAB ID.

Please use the official postal abbreviation (2 letters) to use the state search field. For a full list of state abbreviations, [click here](#).

First Name:	<input type="text"/>	Last Name:	<input type="text"/>	Email:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/>	Zip:	<input type="text"/>
County:	<input type="text"/>	Role:	NAB	NAB ID:	<input type="text"/>

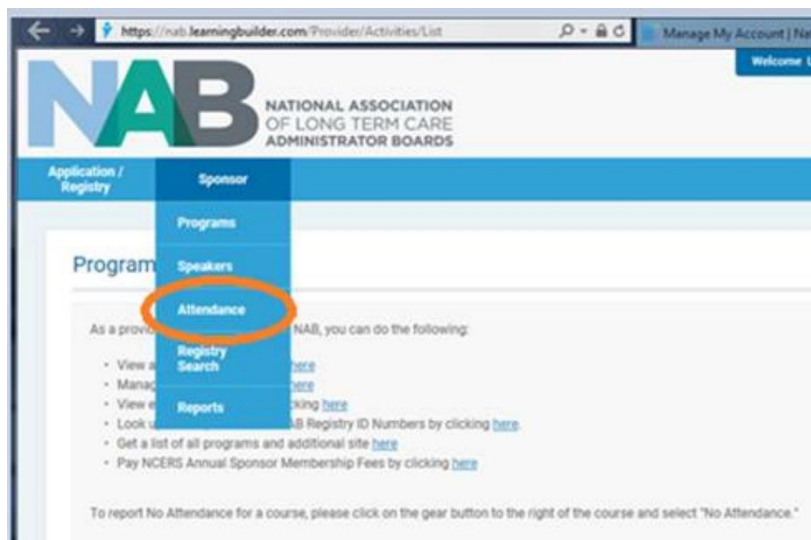
Clear

## C. REPORT ATTENDANCE FOR AN NCERS COURSE VIA SPREADSHEET UPLOAD

Sponsors of NAB/ NCERS approved courses are required to report attendance to the CE Registry within 30 days of a course completion.

Using an upload spreadsheet is recommended if there several attendees to report. The system allows up to 500 lines per upload. In addition, more than one course can be included within the same spreadsheet. If an individual attended multiple sessions at an event with one approval code, please total the CEs that they earned and include it in one line on the spreadsheet. Do not enter the same person with the same approval code more than one time.

While on the NCERS Homepage, please click on Sponsor, below the NAB logo, and then select Attendance.



To upload an attendance spreadsheet, please click on Upload Attendance.

#### Program Attendance

Please choose one of the button options to upload continuing education records for your education attendees.

**Upload Attendance** will allow you to add multiple records from an excel spreadsheet. **Enter Attendance** should be used to add individual CE records.

Individual NAB ID numbers can be found by using the [Registry Search](#) feature.

[Upload Attendance](#) [Enter Attendance](#)

An attendance sheet will need to be created in a specific format, which you can obtain by clicking “Download Template” in the lower right-hand corner of the Upload Program Attendance Page.

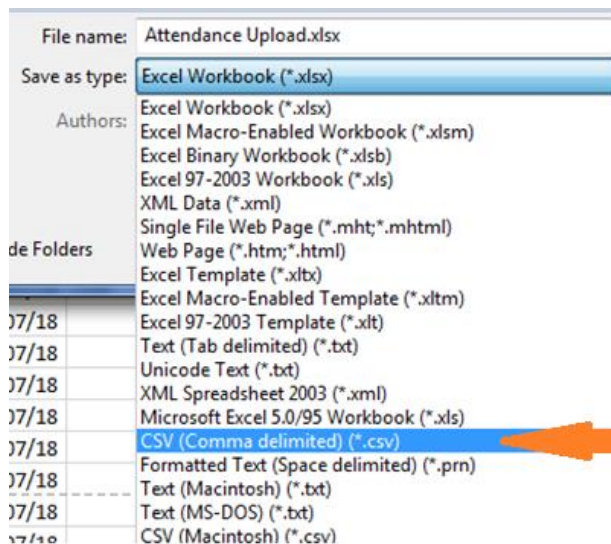
The headers are as follows:

Program Approval Code	Completion Date	Participant Hours Earned	NAB ID	First Name	Last Name	Sessions Attended
-----------------------	-----------------	--------------------------	--------	------------	-----------	-------------------

If your data is already in an Excel spreadsheet, you can use this as long as the columns are renamed with the respective headers above.

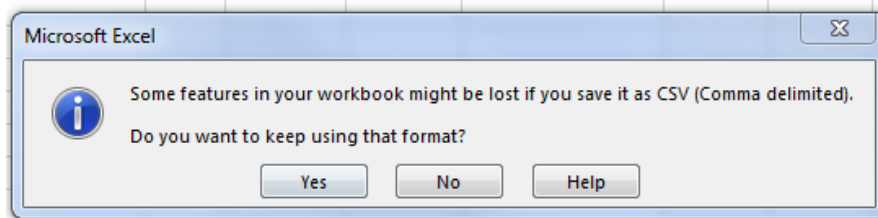
Some items to remember when using the “Upload Attendance” option:

- In column 4 (*NAB ID*): If you do not have an individual’s NAB ID number, you can upload dating using an attendee’s email address or primary state license number. This must be the email address or primary state license number the individual has used to create their NAB ID. If you use a license number, the format will need to be the state abbreviation-license number (i.e. NJ-12345)
- The date format needs to be MM/DD/YYYY.
- The last column, Sessions Attended, can be left blank, but the header needs to be present. This is an optional field to help sponsors track sessions attended.



Once you have completed the attendance spreadsheet within Excel, please Save the file as a .CSV (Comma delimited) file.

Once the file is saved as a .CSV file, it can be uploaded.



If you are asked if you want to keep using the CSV format, please click Yes.

Next, click on “Choose File” on the Upload Program Attendance page, browse to find the attendance file to be uploaded, and click Open. The Provider field will be completed with your sponsor name.

After the attendance file has been selected from your computer, please click Process File.

Provider:

Choose a file to process:  No file chosen

## Program Attendance Upload Succeeded

The attendance records that you uploaded have been successfully processed.

Attendance Records Processed: 1

If the upload was successful, the following message will appear with the number of records successfully upload.

If you receive any alerts, the row number will be included for investigation of the issue. For help understanding common error messages and how to fix them, please see [COMMON ATTENDANCE REPORTING ERRORS AND WHAT THEY MEAN.](#)

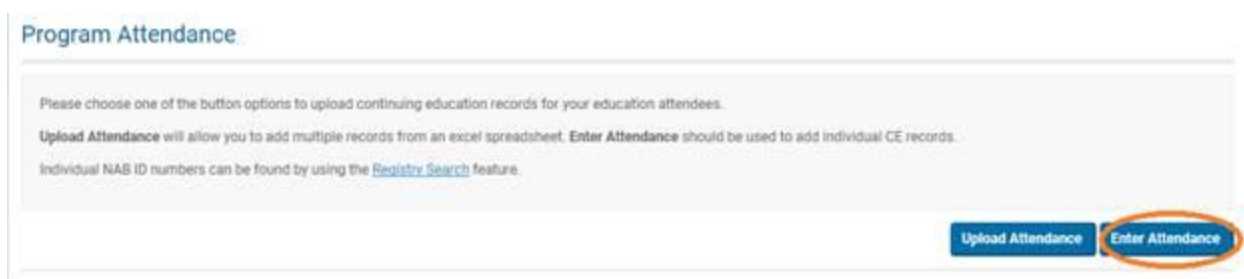
Should an error message be received, **NONE** of the records process successfully. Lines that have a problem can be cut and saved to a different spreadsheet to be corrected later. Those lines that are acceptable can then be uploaded. Once issues are corrected with the problem lines, they too can be uploaded. Course attendance does not need to be uploaded all at the same time, but an attendee can only have a specific course reported once.

If any corrections need to be made after a successful upload, such as credits earned, please email the details to [nab@nabweb.org](mailto:nab@nabweb.org). Please include the individual's first and last name, NAB ID, program approval code, completion date, and the correction requested.

#### D. REPORT ATTENDANCE FOR AN NCERS COURSE ONE ATTENDEE AT A TIME

If you only have a few individuals in which to report attendance for, the more efficient way would be to enter the details one at a time. This is not recommended for a large group.

While on the Program Attendance page, please click on Enter Attendance.



The following form will need to be completed. The Sponsor field will auto populated with your sponsor name.

<b>Sponsor *:</b>	<input type="text"/>
<b>Program Approval Code*:</b>	<input type="text"/>
<b>Completion Date*:</b>	<input type="text"/>
<b>Participant Hours Earned*:</b>	<input type="text"/>
<b>NAB Id*:</b>	<input type="text"/>
<b>First Name*:</b>	<input type="text"/>
<b>Last Name*:</b>	<input type="text"/>
<input type="button" value="Process"/>	

Once you have completed all the fields, please click the orange “Process” button. If you receive an error message, please see [COMMON ATTENDANCE REPORTING ERRORS AND WHAT THEY MEAN](#) for help.

The screenshot shows a web form for reporting attendance. At the top, a grey box contains the message "Record was successfully processed", which is circled in red. Below this message are several input fields, each with a label and an asterisk: "Sponsor \*:", "Program Approval Code\*:", "Completion Date\*:", "Participant Hours Earned\*:", "NAB ID\*:", "First Name\*:", and "Last Name\*:". At the bottom of the form is an orange button labeled "Process".

If you are successful in reporting an individual's attendance it will say "Record was successfully processed" above the form.

After the entry is recorded, some fields will still have information present, such as the course approval code and completion date, should you need to enter another attendee for the course. As the program success message is easily overlooked, this may lead you to report attendance for the same attendee again. If this is done, you will receive "Cannot add Program Id [XXXXXXXXX] because it has already been added, and this group does not allow duplicates," error message. This error notes that this person's attendance has already been reported and you will not be able to report it again.

If any corrections need to be made, such as credits earned, please email the details to [nab@nabweb.org](mailto:nab@nabweb.org). Please include the individual's first and last name, NAB ID, program approval code, completion date, and the correction requested.

## E. COMMON ATTENDANCE REPORTING ERRORS AND WHAT THEY MEAN

Below are the most common errors that have been received by NCERS sponsor. If you receive any error messages, the spreadsheet row number will be included for investigation of the issue.

Some common alerts include:

- NAB ID [RXXXXXXXX] was not found.

This means the NAB ID is incorrect or does not exist. You can always look up the administrator and verify their NAB ID. See directions on [HOW TO SEARCH FOR A NAB ID OF AN INDIVIDUAL](#).

In addition, verify that there are no spaces between the R & the number or at the end of the number. Check if the NAB ID is too short/ long (*the NAB ID begins with an R, followed by 7 digits, with no spaces*).

- Cannot add Program Id [XXXXXXXXX] because it has already been added, and this group does not allow duplicates.

You have already reported attendance for this person for this course or there is a duplicate entry of this person and approval number already in the spreadsheet. Remove any duplicate lines and/or verify if the individual's attendance has been previously reported by following the instructions on how to [RUN AN ATTENDANCE REPORT TO VERIFY ATTENDEES](#).

- Completion Date [MM/DD/YYYY] must be greater than or equal to the Start Date [MM/DD/YYYY] associated with the Activity.

This means that the date of the course is incorrect for the approval code you have used. Please confirm that the program approval code dates are correct for the completion date you are entering. The dates entered must occur between the program's site start and end dates. If the program ran over the course of several days, please use the last day of the course as the completion date.

- First Name [TOM] doesn't match the name on file [THOMAS].

Please change the name in your file accordingly. This can also happen for a person's last name. If need be, please consult your attendance sheet to verify you have the correct person.

## F. REPORTING "NO ATTENDANCE" TO AN NCERS APPROVED COURSE

Attendance or "no attendance" must be reported for all courses.

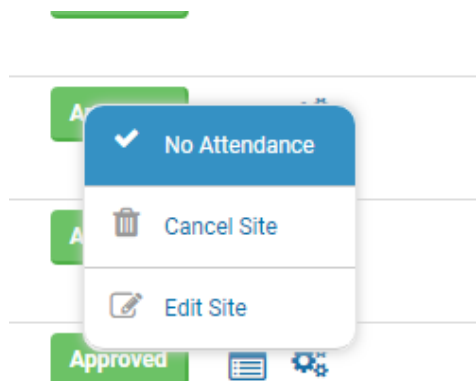
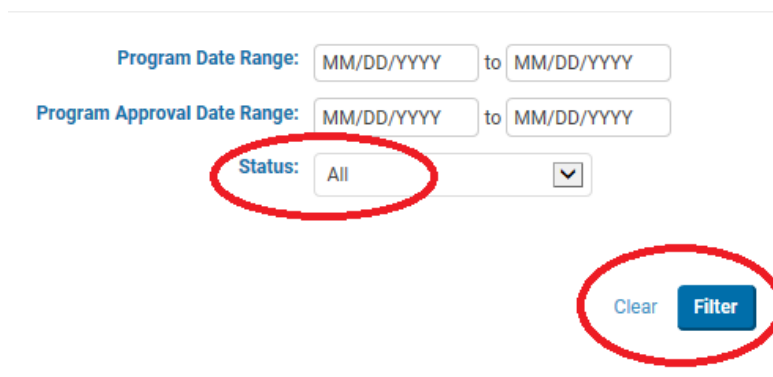
Please report "no attendance" if:

- there were no individuals who attended and earned NAB credit between April 1, 2018 and the program end date,
- no one attended who needs credit reported to the CE Registry (*i.e. nurses*),
- the program was cancelled,
- an administrator did not have a CE Registry within 45 days of the course being completed.

Reporting "no attendance" should be done within the 30 days reporting deadline, or sooner if possible.

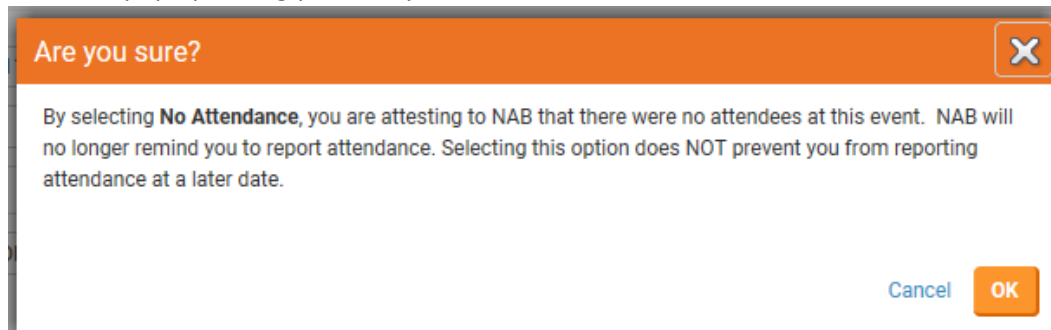
On the Programs page please search by course title or approval code to find the course you wish to indicate had no attendees.

Please change Status to "All" and then click the blue "Filter" button.



Once you have found the course you wish to report no attendance for, please click on the gear icon to the right of the course and select "No Attendance".

A box will pop up asking you “are you sure?” Please select OK.



**PLEASE NOTE:** If you need to report attendance for this course at a later time, you will be able to do so through the usual means of uploading a spreadsheet or entering attendance individually. Reporting “no attendance” will not stop you from reporting attendance later.

## G. RUN AN ATTENDANCE REPORT TO VERIFY ATTENDEES

If you need to verify if you have reported an individual’s attendance, the number of CE hours reported, or if an individual has reported their own attendance for a course, the “Attendance Report” can be run to obtain this information.



While on the NCERS Homepage, please click on Sponsor, below the NAB logo, and then select Reports.

Next, click on Attendance Report.

## Reports

### Sponsor

#### [All Programs](#)

This report lists all approved programs including additional sites.

#### [All Programs 2](#)

This report lists all approved programs including additional sites.

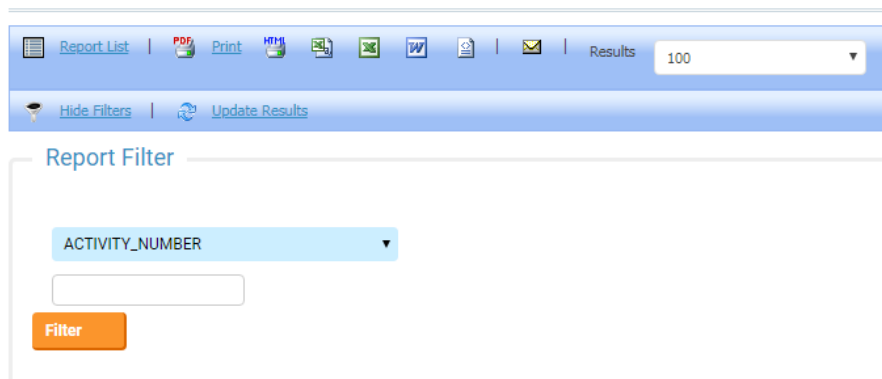
#### [Attendance Report](#)

The report shows all people whose registry shows that they attended a course offered by you. Note: Uploaded attendance may take up to 15 minutes to appear on this report. Attendance recorded and then deleted after the upload will not on the report. The report include self-reported attendance that was not uploaded.

Clicking on the Attendance Report will return results in two sections of the report. The first part is a list of all your courses and the number of attendees that are provider reported (*your company reported the credits*). The second part of the report will list all individuals who have your course(s) reported on their CE Registry, whether their attendance was provided reported or if the individual administrator self-reported their credits.

If you would like to limit the report to just one course, enter the approval code (*also called activity number*) in the box and then click on Filter.

### View Report



If it says “yes” under Sponsor Verified, this means that you, as the sponsor, have reported their attendance. If it says “no” under Sponsor Verified, it means the individual self-reported their attendance.

This report also notes the actual CE credits recorded to their registry in the “Hours” column. You will have to scroll to the left to see all entries in this report.

**Please Note:** It can take at least an hour after you have reported attendance for it to appear in this report.

## H. API OPTION FOR NCERS SPONSORS

API is the acronym for Application Programming Interface, which is a software intermediary that allows two applications to talk to each other. NAB is working with the system developer to bring interested sponsors the potential of connecting systems to report credits automatically to the NAB CE Registry.

If you are interested in setting up an API to report course attendance, please review the directions at [https://www.nabweb.org/filebin/pdf/NAB\\_API\\_Guide\\_2019-01.pdf](https://www.nabweb.org/filebin/pdf/NAB_API_Guide_2019-01.pdf) and contact NAB at [nab@nabweb.org](mailto:nab@nabweb.org).

**An initial set up fee might occur for sponsors who opt to use API technology.**

## I. RUN AN UNREPORTED COURSE LIST FOR ALL OUTSTANDING COURSE

As a sponsor, you can run a report of all the courses for which you have **NOT** yet reported attendance or “no attendance.” There are two ways to run the Unreported Attendance report.

### Programs

While on the NCERS Homepage, please click **Get a list of all programs for which you have not yet reported attendance** [here](#).

As a provider of education through NAB, you can do the following:

- View all Programs by clicking [here](#)
- Manage Speakers by clicking [here](#)
- View expiring Programs by clicking [here](#)
- Look up and export a list of NAB Registry ID Numbers by clicking [here](#).
- Get a list of all programs and additional sites [here](#)
- **Get a list of all programs for which you have not yet reported attendance** [here](#)
- Pay NCERS Annual Sponsor Membership Fees by clicking [here](#)

Or while on the NCERS Homepage, please click on Sponsor, below the NAB logo, and then select Reports.

### Reports

#### Sponsor

##### [All Programs](#)

This report lists all approved programs including additional sites.

##### [All Programs 2](#)

This report lists all approved programs including additional sites.

##### [Attendance Report](#)

The report shows all people whose registry shows that they attended a course offered by you. Note: Uploaded attendance may take up to 15 minutes to appear on this report. Attendance recorded and then deleted after the upload will not be on the report. The report includes self-reported attendance that was not uploaded.

##### [Expiring Programs](#)

This report lists programs that are expiring soon.

##### [Registry ID List 2](#)

This report lists all registry members with their license number.

##### [Unreported Attendance](#)

This report lists all programs, with an end date after April 1, 2018, that have not had any sponsor reported attendance (or “no attendance”). It will include any courses with end dates in the future. These courses do not need attendance reported until after they have been held.

Next, click on the “Unreported Attendance” report.

This report will include all courses that have not had any attendance or “no attendance” reported by you yet.

Please change the Results to “All” to see all outstanding courses. You can also sort the list by clicking on the headers, such as “Site End Date,” which would bring the oldest courses to the top.

Program ID	Program Title	Program Type	Site Start Date	Site End Date
------------	---------------	--------------	-----------------	---------------

**PLEASE NOTE:** This report will have courses with future end dates. These courses would not need attendance reported until after they have been held.

## 6 MEMBER SPONSORSHIP

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### A. HOW TO BECOME AN NCERS SPONSOR MEMBER AND SUBMIT COURSES

All companies wishing to submit programs for NAB approval must be a sponsor member of NAB. Please complete the following steps to become a member:

1. Complete a NCERS Sponsor Application (*linked below*) on behalf of your company and return it by email to [nab@nabweb.org](mailto:nab@nabweb.org) or fax 202-216-9646.
  - [https://www.nabweb.org/filebin/pdf/NCERS\\_New\\_Sponsor\\_Application\\_2018.pdf](https://www.nabweb.org/filebin/pdf/NCERS_New_Sponsor_Application_2018.pdf)
2. Once submitting your application, please create an individual member account on the NAB website for the staff member who will become the primary contact for NAB (*if they do not currently have a NAB account*). This is for the **INDIVIDUAL** who will maintain the account, not the actual **COMPANY** account. For more information on creating individual accounts, visit [SIGN UP FOR A NABVERIFY ACCOUNT](#).
3. All new company accounts must be set up by NAB staff. This will be set up once your application has been received, at which time the main company contact will receive a confirmation email that the account has been created.
4. Once receiving the confirmation email regarding the creation of your company account, please sign and return [The National Association Continuing Education \(CE\) Program Sponsor Agreement of Long Term Care Administrator Boards \(NAB\)](#).
5. Select and pay for the appropriate sponsor membership. If you are unsure which membership is most appropriate for your company, visit the “[Become an NCERS Sponsor](#)” page on the NAB website.
  - See directions [RENEWING A PROVIDER/ SPONSOR MEMBERSHIP](#)
6. While sponsors may begin a program application prior to completed membership payment, programs cannot be submitted for review until membership payments are received and membership activated.
  - See directions: [ENTERING AN IN PERSON PROGRAM](#)
  - See directions: [ENTERING A DISTANCE LEARNING PROGRAM](#)
7. Program payments must be received prior to a program being sent out for review. A panel of three reviewers are asked to complete the program review within 14 calendar days. If questions arise during the review process, the program is returned to the sponsor for clarification.
  - See [IF A SUBMITTED COURSE IS RETURNED](#)
8. Once a program review has been completed, an email will be sent with the program approval code, CE hours approved, and program date. At this time, a program (if open to the public) is added to the [NAB Approved CE Directory](#).
9. Hold the course, reminding all attendee to submit their NAB ID number to you so you can report the credits to NAB.
10. Report course attendance, or “no attendance,” within 30 days of an administrator completing a course. Failure to report course attendance may result in suspension of your sponsor membership.
  - [REPORT ATTENDANCE FOR AN NCERS COURSE VIA SPREADSHEET UPLOAD](#)
  - [REPORT ATTENDANCE FOR AN NCERS COURSE ONE ATTENDEE AT A TIME](#)
  - [REPORTING “NO ATTENDANCE” TO AN NCERS APPROVED COURSE](#)

## B. PAYING PROVIDER/ SPONSOR MEMBERSHIP FEES

NAB/NCERS currently has three sponsor membership types, Standard, Corporate 10, and Corporate Unlimited. In order to submit programs, your sponsor membership must be paid through the date of any course being submitted.

The NAB/NCERS sponsor membership types are:

- **Standard Sponsor** - Annual fee includes unlimited public programs. (*This does not include any program submission fees.*)
- ✓ **Corporate Ten Sponsor**- Annual fee includes up to ten private programs and unlimited public programs. (*This does not include any program submission fees.*) A private program is one that is only available to a select group and is not listed in NAB's public directory of courses. A public program is one that anyone can attend and will be listed in the online NAB Approved CE Database. **Staff orientations, business meetings, and company-wide meetings are not CE eligible.**
- ✓ **Corporate Sponsor** - Annual fee includes unlimited private and public programs. (*This does not include any program submission fees.*) **Staff orientations, business meetings, and company-wide meetings are not CE eligible.**

Please visit <https://www.nabweb.org/Become-a-NCERS-Sponsor> for current pricing information on sponsorship levels. In order to become a sponsor member of NAB, please visit the [certified sponsor](#) page on the NAB website.

To pay for a sponsor membership, please go to the NABVerify homepage, select the option to “Pay NCERS Annual Sponsor Membership Fees by clicking here.”

**PLEASE NOTE:** You must first log in on the NAB website and click on the “NCERS Homepage/Third Party Certification program” web link to pay sponsor membership fees.

Next, click the orange “Continue” button while on the Applications/ Registries page next to Sponsor Application.

Application / Registry	Status
<input checked="" type="radio"/> Sponsor Application	Awaiting Fees <input type="button" value="Continue"/>

NAB/NCERS currently has three Sponsor Membership types. Programs or sessions that deal with internal affairs of an organization do not qualify for credit.

If you would like to submit programs for review and approval that are open only to your employees/members, you will need to register as one of the corporate sponsor types.

If you have additional questions, please contact NAB's Director of Credentialing at [nab@nabweb.org](mailto:nab@nabweb.org).

NOTE: Sponsor Membership is NOT required to submit Third Party Certification Programs.

Click the orange “Select Sponsor Type” button to review and select the appropriate membership level. The levels are listed with current pricing information for Standard, Corporate 10, or Corporate. If you are a certified sponsor, fees will automatically reflect the pricing difference once selecting your sponsor type.

**Awaiting Sponsor Type**

NAB/NCERS currently has three sponsor membership types as described below. In order to submit programs, please choose from one of the following membership types below.

- Standard Sponsor - This is an annual fee. It includes unlimited public programs. (this does not include any program submission fees)
- Corporate Ten Sponsor - This is an annual fee. It includes up to ten private programs and unlimited public programs. (this does not include any program submission fees)
- Corporate Sponsor - This is an annual fee. It includes unlimited private and public programs. (this does not include any program submission fees)

Please note:

1. If you are a certified sponsor, you can be any of the following member types. If you have additional questions please contact NAB's Director of Credentialing at [nab@nabweb.org](mailto:nab@nabweb.org).
2. Sponsor Membership is NOT required to submit Third Party Certification Programs.

**Select Sponsor Type**

Select the appropriate sponsorship type (level) from the drop-down menu and click the orange "Next" button. You will be given two payment options: Submit a credit card payment or mail a check.

**Sponsor Application: Select Sponsor Type**

NAB/NCERS currently has three sponsor membership types as described below. In order to submit programs, please choose from one of the following membership types below.

- Standard Sponsor - This is an annual fee. It includes unlimited public programs. (this does not include any program submission fees)
- Corporate Ten Sponsor - This is an annual fee. It includes up to ten private programs and unlimited public programs. (this does not include any program submission fees)
- Corporate Sponsor - This is an annual fee. It includes unlimited private and public programs. (this does not include any program submission fees)

Please note:

1. If you are a certified sponsor, you can be any of the following member types. If you have additional questions please contact NAB's Director of Credentialing at [nab@nabweb.org](mailto:nab@nabweb.org).
2. Sponsor Membership is NOT required to submit Third Party Certification Programs.

Current Sponsor Type: Standard

Certified Sponsor:

Sponsor Type\*: Standard

Cancel Next

Once choosing your sponsor type and completing payment (*it will be calculated upon checkout*), your membership will be activated or renewed for the year. If a Sponsor chooses to pay by check, your membership will not be active until the payment has been received. For those sponsors renewing their sponsorship and paying by check, please calculate ample time for payment to be received to avoid a lapse in membership.

All sponsor types are eligible for certified sponsor status if their application is approved and they meet the requirements. Please see Certified Sponsor requirements [NCERS CERTIFIED SPONSOR INFORMATION](#).

To access an archived webinar presentation on how to use the updated NCERS platform, please [CLICK HERE](#). This presentation was given in March 2016. You will need to enter your username and email to access the recording.

## C. NCERS CERTIFIED SPONSOR INFORMATION

For Providers/Sponsors of continuing education to become a certified sponsor, the following criteria must be met:

- ✓ The Sponsor must be reputable in the field of expertise related to the subject presented and associated with any of the following: an accredited educational institution, a recognized professional or trade association, or other legitimate entities capable of conducting adult continuing education.
- ✓ The Sponsor must have been a proven provider of continuing education under the NCERS program for a minimum of 2 years and remain in good standing.
- ✓ The Sponsor has submitted a minimum of ten programs for review during their membership period.

- ✓ Upon approval, the Sponsor signs the Certified Sponsor Agreement which sets forth the stipulations for continued approval.

Currently, there are no fees associated with applying for certified sponsor status. Upon approval, membership rates will increase at time of renewal. Both Standard and Corporate members are eligible to apply. The benefits to becoming a certified sponsor are:

- ✓ Programs will only incur a late fee if they are entered 3 days prior to the initial program start date (*versus the 45 day late fee for standard sponsors*).
- ✓ Sponsors are not required to enter the following fields within their program applications:
  - \* Program Description
  - \* Learning Objectives
  - \* Relevance
  - \* Certificate Issuance Process
  - \* Attendance Verification Method
  - \* Hours Rationale (*for distance learning programs only*)
- ✓ Providers/Sponsors only have to enter the first and last name of the speakers (*in lieu of speaker expertise, bio, and educational background*) when entering them within the program application.
- ✓ When entering a Distance Learning program, posttests and supplemental program booklets are not required to be submitted to the NAB.
- ✓ Programs are not required to be reviewed by NCERS reviewers and are reviewed by NAB staff. If sponsor follows the guidelines for certified sponsors and if total program and participant hours are calculated correctly, they will be sent a program approval number within three days of application submission date.

Certified Sponsor applications are reviewed for approval twice a year by NAB's Continuing Education committee. These reviews occur during the NAB Annual Meeting in June and the NAB Mid-Year meeting in November. Once decisions are made, NAB's Director of Credentialing will notify all applicants. If the Sponsor's application was approved for certified sponsor status, then the NAB/NCERS Certified Sponsor Agreement will be sent for signature. Once completed, the Sponsor account will be updated to the certified sponsor status.

Applications for the spring review must be submitted to the NAB office by **March 15th**, and applications for the fall review must be submitted by **August 15th**.

**Beginning in November 2019**, all providers who currently certified sponsor members of the NAB will be required to renew their status. NAB is diligently working to send all sponsors notification regarding their status renewal dates. More information will be distributed soon regarding the process of renewing your certified sponsor status.

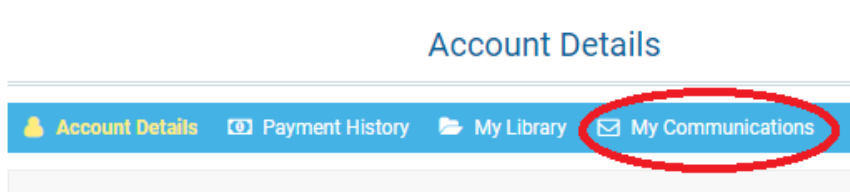
For additional questions regarding certified sponsors, please contact the NAB office at (202) 712-9040 or by email at [nab@nabweb.org](mailto:nab@nabweb.org).

## 7 MISCELLANEOUS

### A. ACCESSING COMMUNICATIONS SENT FROM NAB

NAB communicates regularly with sponsor through NABVerify's automated email service. Messages are sent from NAB in regard to program submission, program approval, payment confirmation, etc. to the primary email address listed on your company account. These messages are archived within the communications area of the system. If you need to locate a message that was sent to you in the past, please visit "My Communications" while logged into your account.

In order to access the communications archive, first log in to your account and choose "NCERS Homepage/Third Party Certification Programs". Once you are in the NABVerify system, click on "My Account" in the upper right-hand corner, which will take you to your Account Details page.



Click on the "My Communications" link below your company name. A list of all messages sent from the NCERS system will be listed.

Click on the email title to open the message for review.

A screenshot of the 'My Communications' page. The page has a blue header with the title 'My Communications'. Below the header is a navigation bar with four links: 'Account Details' (with a person icon), 'Payment History' (with a calendar icon), 'My Library' (with a folder icon), and 'My Communications' (with an envelope icon). Below the navigation bar is a table with two columns: 'Subject' and 'Sent Date (EST)'. The table contains seven rows of messages, each with a checkmark icon in the 'Subject' column. The messages are: 'NAB Payment Confirmation' (10/30/2018 04:40 PM), 'NAB: Program Site Notification (20190122-100-A50021-IN)' (10/30/2018 04:40 PM), 'NAB: Program Approval Email (A49914)' (10/30/2018 01:53 PM), 'NAB: Notice of Registry Reporting Requirements for Sponsors' (10/30/2018 01:53 PM), 'NAB: Program Site Notification (20190811-56-A49956-IN)' (10/27/2018 11:19 AM), 'NAB Payment Confirmation' (10/27/2018 11:19 AM), and 'NAB: Program Site Notification (20181205-3-A49925-IN)' (10/26/2018 12:56 PM).

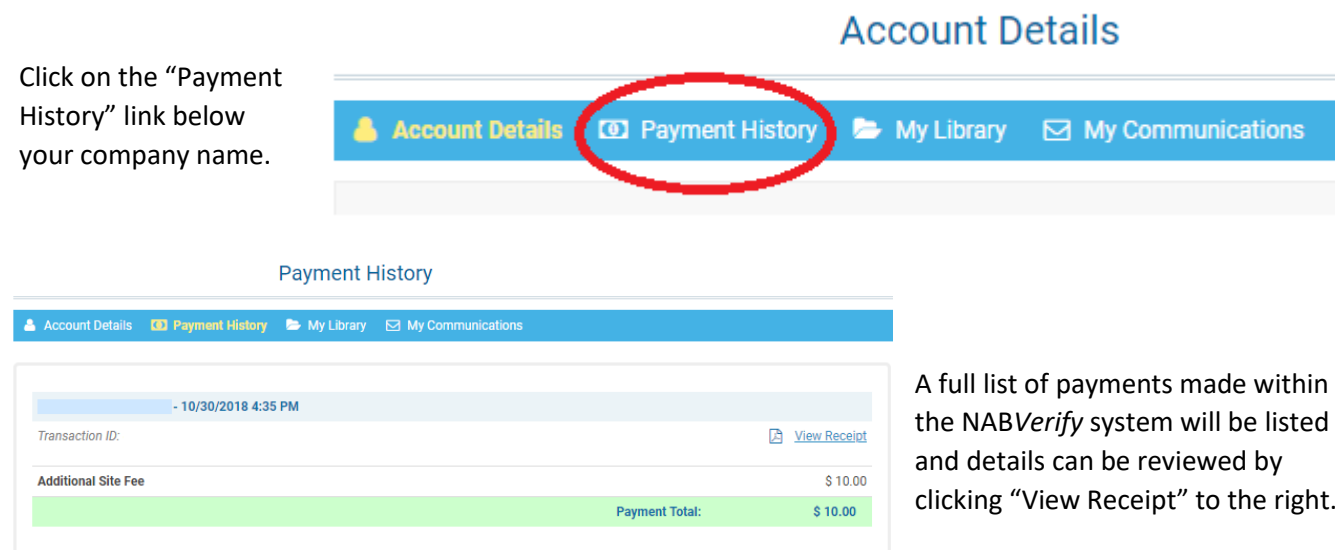
Subject	Sent Date (EST)
☑ NAB Payment Confirmation	10/30/2018 04:40 PM
☑ NAB: Program Site Notification (20190122-100-A50021-IN)	10/30/2018 04:40 PM
☑ NAB: Program Approval Email (A49914)	10/30/2018 01:53 PM
☑ NAB: Notice of Registry Reporting Requirements for Sponsors	10/30/2018 01:53 PM
☑ NAB: Program Site Notification (20190811-56-A49956-IN)	10/27/2018 11:19 AM
☑ NAB Payment Confirmation	10/27/2018 11:19 AM
☑ NAB: Program Site Notification (20181205-3-A49925-IN)	10/26/2018 12:56 PM

In order to search your message history, type Ctrl & F. This will open the find function. You can enter the initial program ID (*this begins with an "A" followed by 5 numbers*) to search for a specific approval email. The find function will only work one page at a time. You may need to advance to the next page, by clicking the "Next" button at the bottom of the list of communications, to continue the search.

### B. ACCESSING PAYMENT RECEIPTS

The NABVerify system also archives payment receipts. In order to find a payment receipt for a program or sponsorship, first log in to your account and choose "NCERS Homepage/Third Party Certification Programs". Once you are in the NABVerify system, click on "My Account" in the upper right-hand corner, which will take you to your Account Details page.

Click on the “Payment History” link below your company name.



The screenshot shows the 'Account Details' page. At the top, there is a navigation bar with four links: 'Account Details' (with a person icon), 'Payment History' (with a document icon and circled in red), 'My Library' (with a folder icon), and 'My Communications' (with an envelope icon). Below this, the 'Payment History' section is displayed. It shows a transaction for '- 10/30/2018 4:35 PM' with a 'Transaction ID:' and a 'View Receipt' link. Below this, a table shows 'Additional Site Fee' for '\$ 10.00' and a 'Payment Total' for '\$ 10.00'.

A full list of payments made within the NABVerify system will be listed and details can be reviewed by clicking “View Receipt” to the right.

## 8 NAB/NCERS PROCEDURE GUIDELINES

### A. APPLICATION STANDARDS FOR PROGRAM CONTENT

The National Continuing Education Review Service (NCERS) strives to provide a continuing education review service that assures the over 45,000 licensed long term care administrators in the U.S. who attend these approved programs, along with state licensing jurisdictions who accept NAB approval as meeting their CE requirement, that the educational content has been reviewed as relevant to the NAB Domains of Practice and is qualified as continuing education. NCERS reviewers ensure that these programs meet high standards for program content, presenter qualifications, and attendance verification.

All CE program applications are accepted through NAB’s online CE system. Program fees remitted to the NAB are non-refundable. In order for programs to be considered for CE approval, subject matter:

- ✓ relates to long term senior living and health services administration.
- ✓ Promotes continued knowledge and skill(s) within the NAB Domains of Practice.
- ✓ has been developed by the sponsor organization offering the CE program or CE Sponsor has explicit approval from the content owner to present the program content.
- ✓ does not contain subject matter dealing with the internal affairs of the organization. \*
- ✓ does not contain commercial promotion of specific products and services. \*

*\* NAB approval will not be granted for sessions related to the internal affairs of the organization and/or advertisement of products/services. These specific activities will need to be deducted from the total CE hours requested prior to approval.*

### B. APPLICATION STANDARDS FOR SPEAKERS/PRESENTERS

As part of the submission process, NAB requests speaker information in order to verify qualifications. To be approved to present NAB accredited content, speakers/presenters must have:

- ✓ expertise in the subject matter presented.

- ✓ Insight into educational and instructional methods for adult learners.

*Programs that do not meet the above criteria will be requested to provide additional information or will be denied.*

### C. ATTENDANCE MONITORING AND VERIFICATION PROCESS

By submitting a program to the NCERS for review (*with subsequent approval*), Sponsors agree to adhere to all current monitoring and reporting requirements as specified by NAB.

**FOR LIVE PROGRAMS:** The attendance monitoring and verification procedures are listed below:

- ✓ Sponsors will verify attendance to ensure attendees receive credit for only sessions attended.
- ✓ If no credits were awarded for an approved program, sponsors will report “No Attendance” to the NAB CE Registry.
- ✓ Report all credits to NAB’s national CE Registry within 30 days of session completion.

**FOR SELF-STUDY PROGRAMS:** The attendance monitoring and verification procedures are listed below:

- ✓ Sponsors will administer a program post-test to verify learning and ensure course completion (*post-tests should contain a minimum of 5 questions per 1 hour of CE content. (Additional CE credits will be awarded for completion of the post-test)*)
- ✓ Report all credits to NAB’s national CE Registry within 30 days of session completion.
- ✓ If no NAB credits were awarded for an approved program, sponsors will report “No Attendance” to the NAB CE Registry.
- ✓ Require a score of 70% or better on the post-test to receive a certificate of completion

For more information regarding NAB’s CE Registry, please visit <https://www.nabweb.org/ceregistry>.

### D. SUBMISSION OF APPLICATION AND REVIEW PROCESS

**Submission of application—Timelines and Late Fees:** The recommended timeframe for application submission is 60 days prior to scheduled program date. This allows the Sponsor to obtain the maximum advertising benefits of their program on the NAB Approved CE Database. In order to be added to the NAB Approved CE Database, CE programs are required to be open to the public to attend and are approved for CE credit.

In order to not incur a late fee, programs must be submitted through the NAB NCERS online application system at least 45 days in advance of the program date (*a minimum of 3 days for certified sponsors*). A late fee of \$400 will be applied in addition to the program application fees if submitted less than 45 days (or 3 days for certified sponsors) in advance of the program date. Programs not paid within 10 business days of submission date will be returned to the Sponsor and late fees will be applied if applicable. **All fees are non-refundable, even if program is denied.**

Due to the volume of program reviews, applications received less than 15 days prior to program date may be rejected.

**Notification of NCERS Application Approval/Denial:** Sponsors will receive an email notification once a program review is complete. If approved, the notification email will contain the official NCERS approval code along with the number of approved hours. Sponsors should use the NCERS approval code along with the NAB CE language found within the email received as well as in this User Guide on all advertising and

promotional material. If the program approval is denied, Sponsors will receive email notification along with a follow-up letter outlining the reasoning behind the denial and how to appeal the decision.

**NAB Program Appeal Process:** If the program is denied or partially approved (approved for less hours than requested), the Sponsor has 30 days from the date that the notice of denial/partial approval was received to appeal the decision. All appeals must be made in writing and include additional information that addresses the reason for denial. Once received, additional information will be reviewed to determine if it is sufficient to reverse the initial decision. **All appeal decisions are final.**

## E. RECORDS MAINTENANCE

In order to ensure an accurate license renewal process for all long term administrators, Sponsors agree to retain the items below for a minimum of two years from the date of the program occurrence:

- ✓ Attendance sheets documenting participation for in person courses. *(If using electronic scanners, please retain a digital copy of data received.)*
- ✓ Data or post-tests to demonstrate how attendance and/or completion of a course was monitored for Distance Learning courses.
- ✓ A summary of course evaluation results submitted by program attendees pursuant to the "Program Evaluation" provisions noted within this handbook.
- ✓ A master list of all individuals who participated in the course along with total participant hours earned. \*\*
- ✓ An example certificate that was presented to attendees. \*\*

*\*\* If a program date occurred on or after **April 1, 2017**, and CE credits have been reported to the NAB CE Registry, items noted with \*\* are NOT required to be kept for the requisite two years. If individual course attendance has not been reported due to failure in providing a NAB ID number, CE records must be retained, but Sponsors are not obligated to issue a completion certificate to the participant after efforts have been made to obtain the ID.*

## F. INTELLECTUAL PROPERTY USE

Intellectual Property is an area of law that governs the ownership and rights to "products of the mind." With the rise of eLearning courses being developed, the amount of copyright infringements in relation to intellectual property has increased. It is imperative for content developers to realize copyright protection begins as soon as the work is presented in a tangible medium, whether in published form or not. If a course is developed from a provider who is **NOT** the intellectual property owner, the following guidelines should be adhered to:

1. Content used should fall under the [Fair Use Guidelines](#).
2. If content does not fall under the Fair Use Guidelines, the provider should have explicit approval from the original author to use the intellectual property.
3. Content development should require the learner to analyze the information and apply it to their own practices in long term care. Courses that do not promote critical thinking will not be considered for NAB credit.

For more information regarding eLearning and Intellectual property rights, please [CLICK HERE](#). To review the official guidelines regarding the Copyright Law of the United States, [CLICK HERE](#).

## G. EXTENT OF NAB/ NCERS APPROVAL

The Sponsor understands that the approval of NAB/NCERS covers only the programs submitted and that while the approval may be extended upon the request of the Sponsor and the approval of NAB to cover additional, identical offerings of the same program at any time within a year from the date of the first program offering, if there is a change or an addition in presenters, dates or locations, the Sponsor agrees to submit the information in advance of such changes. Further, the Sponsor understands that extensions for identical offerings of an approved program beyond one year may be obtained only by submission of a renewal request and that NAB accepts no responsibility for sending reminders to Sponsor regarding expiration of program approval.

## H. ACCEPTANCE OF NAB MONITORS AT APPROVED NCERS SESSIONS

The Sponsor agrees to accept NAB designated monitors at NCERS approved programs and understands that such monitors will appear randomly, without advance notice. The monitor will present an official letter from NAB verifying their status as a NAB monitor and must be permitted to attend without being required to pay a registration fee.

## I. USE OF NAB/ NCERS NAME ON PROMOTIONAL MATERIAL

Below is language for all Providers/Sponsors to use on promotional materials. Language is provided for the different stages of the approval process. Please note that this is the approved language by NAB/NCERS, and the Sponsor agrees to use only the following language in promotional marketing materials:

- **If the program has already been approved by NAB:**  
*"This program has been approved for Continuing Education for xx total participant hours by NAB/NCERS—approval #xxxxxx-xxxx-x"*
- **If the program has been submitted for review but the sponsor has not yet been notified of the NAB decision:**  
*"This program has been submitted (but not yet approved) for Continuing Education for xx total participant hours from NAB/NCERS. Call \_\_\_\_\_ (name and phone number of sponsor contact) for further information."*

Please refrain from adding the NAB email address or creating an email address for your company referencing NAB. (e.g. [nab@gmail.com](mailto:nab@gmail.com) should NOT be used).

## J. USE OF NAB LOGO

The NAB logo is the sole and exclusive property of the NAB. The logo may be used only by NAB accredited colleges and universities, and by sponsors of NCERS approved programs or NCERS certified and corporate sponsors in good standing if, and only if, such is made pursuant to the terms and conditions of this limited and revocable license. Any failure by a user to comply with the terms and conditions contained herein may result in the immediate revocation of this license, in addition to any other sanctions imposed by NAB. NAB, in its sole discretion, shall make the interpretation and enforcement (or lack thereof) of these terms and conditions, and compliance therewith.

The logo is made available to NAB accredited Colleges and Universities and to sponsors of NCERS approved programs or NCERS certified and corporate sponsors in good standing in camera-ready, electronic, in color and/or black and white. If academic accreditation, registered or certified sponsor designation, or program approval is not in good standing, the organization agrees to destroy all related promotional materials and cease use of the NAB logo. The logo may not be revised or altered in any way, and must be displayed in the same form as produced by NAB. It may, however, be displayed on different (neutral) backgrounds, so long as those backgrounds do not conflict graphically with the clear appearance, readability and recognition of the logo. Ideally, the logo should be displayed as a black and white positive image against a neutral background. The logo may be displayed in black & white, or in Pantone Matching System (PMS) 8183. No other colors may be used, nor may the logo be displayed on patterned backgrounds (such as polka dots, wavy lines, etc.) that alter its character and message. The logo is a graphic symbol, not a text character. It is not to be used as part of a sentence or headline.

The logo may be used in a professional manner on the user's promotional literature, including brochures, company website, or advertisements, or in any other comparable manner to signify the user's accreditation or approval by the NAB. The logo may never be used independent of the term "NAB Accredited" by NAB accredited colleges and universities or "NCERS Approved" by sponsors of NCERS approved programs and/or NCERS certified or corporate sponsors.

The NAB logo and/or the term 'NAB Accredited' must be accompanied by the following statement: 'The long term care administration program at (school name) is accredited by the National Association of Long Term Care Administrator Boards. For additional information, contact NAB at 1120 20th St., NW, Suite 750, Washington, DC 20036, (202)712-9040, or [www.nabweb.org](http://www.nabweb.org).

The NAB logo and/or the term 'NCERS Approved' must be accompanied by the following statement: 'This program is approved by the National Association of Long Term Care Administrator Boards. For additional information, contact NAB at 1120 20th St., NW, Suite 750, Washington, DC 20036, (202)712-9040, or [www.nabweb.org](http://www.nabweb.org).

Notwithstanding the foregoing, the logo may not be used in any manner that, in the sole discretion of NAB, discredits NAB or tarnishes its reputation and goodwill; is false or misleading; violates the rights of others; violates any law, regulation, or other public policy; or mischaracterizes the relationship between NAB and the user.

Use of the logo shall create no rights for users in or to the logo or their use beyond the terms and conditions of this limited and revocable license. The logo shall remain at all times the sole and exclusive intellectual property of NAB. NAB shall have the right, from time to time, to request samples of use of the logo from which it may determine compliance with the terms and conditions. Without further notice, NAB reserves the right to prohibit use of the logo if it determines, in its sole discretion, that user's logo usage, whether willful or negligent, is not in strict accordance with the terms and conditions of this license, otherwise could discredit NAB or tarnish its reputation and goodwill, or the user is not in good standing.

## K. ATTENDANCE VERIFICATION

The Sponsor agrees to provide a means of monitoring attendance and will note in the online program application how this will be accomplished. This ensures that attendees only receive credit for time present at the educational event and should include routine monitoring throughout. The recording of attendance at the initiation and completion of the session should not be the primary means of monitoring.

## L. PROGRAM EVALUATION PROCEDURES

The Sponsor agrees to provide a means for program attendees to evaluate the content and delivery of the program and program relevancy to long term care administrators' jobs. It is recommended that evaluations incorporate items included in the sample NCERS Program Participant Evaluation form as presented in the [MODEL EVALUATION](#). In addition, all programs must publish the email address [cecomments@nabweb.org](mailto:cecomments@nabweb.org) should an attendee opt to provide feedback directly to NAB.

## M. CERTIFICATE OF ATTENDANCE FOR ATTENDEES

With the implementation of NAB's CE Registry on April 1, 2018, it is no longer required that sponsors provide individual certificates of program attendance. Reporting to the CE Registry is required for all NAB approved programs and will allow administrators to print certificates as needed.

Sponsor can still issue individual certificates of program attendance to each participant if they choose to do so. The certificate should include:

- ✓ The name of the lead sponsoring company as it is listed in the NAB Public Directory. Should a name change be required, please email [nab@nabweb.org](mailto:nab@nabweb.org) for more information
- ✓ The attendee name
- ✓ The program title, which should match exactly what is listed within the NAB Public Directory.
- ✓ The lead company contact's name along with sponsor signature
- ✓ The number of CE credits earned
- ✓ The NCERS approval number. Please remember that all NCERS approval numbers for live webinars and in person courses are unique and additional sites must be added for NAB credit to be earned.
- ✓ The NAB Domains of Practice. \*\*\*

*\*\*\* Because some states require their licensees to complete CE in specific Domains of Practice, sponsors are urged to also include the Domains of Practice covered by the program directly on the certificate of attendance.*

Please review the [MODEL CE CERTIFICATE](#) as an example.

## N. ATTENDANCE REPORTS TO STATES

Effective June 30, 2018, with the implementation of the mandatory reporting requirements to the NAB CE Registry, CE sponsors are no longer required to report an administrators' credits to their respective state board.

## 9 APPENDIX

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### A. MODEL CE CERTIFICATE

**Program Name**

**Certificate of Completion**

*First and Last name*

has successfully completed this course and earned \_\_\_\_\_ participant hours of

NAB Approved Continuing Education

NAB/NCERS Approval Number: \_\_\_\_\_

[NHA/RCAL/HCBS Domains of Practice/*recommended*]



\_\_\_\_\_  
[Lead Sponsor Contact's Name or Signature]

\_\_\_\_\_  
[Lead Sponsor's Title]

[Your logo]

[Lead CE Sponsor's Company Name]

*This program has been approved for Continuing Education for xx total participant hours by NAB/NCERS—approval  
#xxxxxxxx-x-xxxxxx-xx*

## B. SAMPLE CE CERTIFICATE ISSUED VIA NAB'S CE REGISTRY



## C. MODEL EVALUATION



Program title:

NCERS approval #:

Sponsoring Organization:

Program date(s):

Scale:           5=Excellent  
                  4=Good  
                  3=Average  
                  2=Needs Improvement  
                  1=Unsatisfactory

Rate the following aspects of the program:

\_\_\_\_\_ Learning objectives we met

- \_\_\_\_\_ Content material was engaging
- \_\_\_\_\_ Appropriateness of topic and content to long term care
- \_\_\_\_\_ Usefulness of the knowledge/skills acquired
- \_\_\_\_\_ Instructor's knowledge of materials/topic
- \_\_\_\_\_ Instructor's presentational skill
- \_\_\_\_\_ Overall program rating

*This program has been approved for Continuing Education by NAB/NCERS. NCERS strives to approve quality programs whose content can reasonably contribute to the professional development of long term care administrators. Should you have any confidential comments concerning this program, please direct them to NAB by phone or email at (202) 712-9040 or [cecomments@nabweb.org](mailto:cecomments@nabweb.org).*

## D. CONTINUING EDUCATION ATTENDEE VALIDATION STATEMENT

The following statement is available for NAB Providers/Sponsors to voluntarily use at their discretion within their meeting programs to enhance their attendees understanding of NAB/NCERS CE credit.

"This professional continuing education offering has been reviewed and approved as meeting the expectations set forth by the National Continuing Education Review Service (NCERS) on behalf of the National Association of Long Term Care Administrator Boards (NAB)."

Administrators are eligible to receive professional continuing education credit (CE) when the following expectations are met, and a valid Certificate of Attendance is obtained via the CE Registry following the Sponsor organization reporting attendance. Below are the expectations which are required to be met for the issuance of valid approved credit:

- ✓ The Attendee provides full name, address, title, contact information, license number(s) and state (jurisdiction) of issuance, and NAB ID.
- ✓ While not required, attendees are encouraged to complete an evaluation for each program they attend, to help Sponsors monitor attendee satisfaction and compile suggestions for future programming.
- ✓ Monitoring attendance is part of the Sponsor's responsibility to NCERS, NAB and the attendee, with approved credits. In order to ensure that credit is received, the attendee has the obligation to be present for the full duration of the approved education session, including any question and answer or discussion period at the conclusion of in-person education programs. Evidence of attendance will occur when the attendee complies with the attendance verification procedures in-place for this approved Sponsor.
- ✓ The maximum number of credits that may be earned in one 24 hour period is limited to eight (8) credit hours.

**Note:** Only those officially registered for this approved CE session are eligible to receive CE credit.

**If you have comments about this program, please contact NAB through [www.nabweb.org](http://www.nabweb.org).**

## E. CORPORATE (PRIVATE) PROGRAM ACCEPTANCE BY STATE BOARDS

NAB offers three different types of membership: the Standard, the Corporate 10, and the Unlimited Corporate. Please see [RENEWING A PROVIDER/ SPONSOR MEMBERSHIP](#) for a description of each membership type and benefits.

**PLEASE NOTE:** Not all state boards will accept private programs for CE renewal credit.

Please review the [Corporate Sponsored \(Closed\) Program Requirements](#) to determine which states are ineligible for credit. If you are offering a private/closed program for CE credit, NAB suggests that the following statement be added to program advertised.

“This program is approved as a Corporate (Closed/Private) program for xxx CE. It is pertinent to note that not all states accept programs that are closed/private. For more information regarding state requirements, please go to [www.nabweb.org/state-licensure-requirements](http://www.nabweb.org/state-licensure-requirements). Any comments may be sent to [nab@nabweb.org](mailto:nab@nabweb.org).”

## F. NHA/ RCAL/ HCBS DOMAINS OF PRACTICE

### 10. Customer Care, Supports, and Services

- 10.01. Establish care recipient service policies and procedures that comply with applicable federal and state laws, rules, and regulations.
- 10.02. Ensure plans of care are evidence-based, established, implemented, updated, and monitored based on care recipient preferences and assessed needs.
- 10.03. Ensure the planning, development, implementation/execution, monitoring, and evaluation of admission/move in process, including preadmission/premove information, to promote a quality experience for care recipients.
- 10.04. Ensure the planning, development, implementation/execution, monitoring, and evaluation of discharge/move out process to promote a quality experience for care recipients.
- 10.05. Ensure the planning, development, implementation/execution, monitoring, and evaluation of programs to meet care recipients' psychosocial needs and preferences.
- 10.06. Ensure the planning, development, implementation/execution, monitoring, and evaluation of care recipients' activities/recreation to meet social needs and preferences.
- 10.07. Ensure the planning, development, implementation/execution, monitoring, and evaluation of a health information management program to meet documentation requirements in compliance with federal and state regulations.
- 10.08. Ensure the planning, development, implementation/execution, monitoring, and evaluation of medication management that supports the needs of the care recipient.
- 10.09. Ensure the planning, development, implementation/execution, monitoring, and evaluation of a rehabilitation program to maximize optimal level of functioning and independence for care recipients.
- 10.10. Ensure the planning, development, implementation/execution, monitoring, and evaluation of systems for coordination and oversight of contracted services.

- 10.11. Ensure the planning, development, implementation/execution, monitoring, and evaluation of policies and procedures for responses to care recipient-specific incidents, accidents, and/or emergencies.
- 10.12. Ensure the planning, development, implementation/execution, monitoring, and evaluation of housekeeping and laundry services for care recipients.
- 10.13. Ensure the planning, development, implementation/execution, monitoring, and evaluation of education intended for care recipients and their support networks.
- 10.14. Ensure the planning, development, implementation/execution, monitoring, and evaluation of nutritional needs and preferences of care recipients.
- 10.15. Ensure the planning, development, implementation/execution, monitoring, and evaluation of dining experience that meets the needs and preferences of care recipients.
- 10.16. Ensure care recipients' rights and individuality within all aspects of care.
- 10.17. Integrate support network's perspectives to maximize care recipients' quality of life and care.
- 10.18. Ensure transportation options are available for care recipients.
- 10.19. Ensure the provision of a customer service culture that leads to a quality experience for care recipients.

## **20. Human Resource**

- 20.01. Ensure that human resource management policies and programs comply with federal and state rules and regulations.
- 20.02. Establish the planning, development, implementation, monitoring, and evaluation of recruitment, selection, and retention practices.
- 20.03. Establish the planning, development, implementation, monitoring, and evaluation of employee training and development programs.
- 20.04. Establish the planning, development, implementation, monitoring, and evaluation of employee evaluation programs.
- 20.05. Establish the planning, development, implementation, monitoring, and evaluation of compensation and benefit programs.
- 20.06. Establish the planning, development, implementation, monitoring, and evaluation of employee health and safety programs.
- 20.07. Establish the planning, development, implementation, monitoring, and evaluation of employee satisfaction and organizational culture.
- 20.08. Establish the planning, development, implementation, monitoring, and evaluation of employee disciplinary policies and procedures.
- 20.09. Establish the planning, development, implementation, monitoring, and evaluation of employee grievance policies and procedures.
- 20.10. Establish the planning, development, implementation, monitoring, and evaluation of leadership development programs.
- 20.11. Promote a safe work environment (such as safety training and employee risk management).
- 20.12. Promote a positive work environment (using techniques such as conflict resolution, diversity training, staff recognition programs).

- 20.13. Facilitate effective written, oral, and electronic communication among management and employees.
- 20.14. Ensure employee records and documentation systems are developed and maintained.
- 20.15. Establish a culture that encourages employees to embrace care recipients' rights.

### **30. Finance**

- 30.01. Ensure that financial management policies, procedures, and practices comply with applicable federal and state rules and regulations.
- 30.02. Develop, implement, and evaluate the service provider's budget.
- 30.03. Oversee the billing and collections process and monitor the accuracy of charges and timely collection of accounts.
- 30.04. Negotiate, interpret, and implement contractual agreements to optimize financial viability.
- 30.05. Develop, implement, monitor, and evaluate financial policies and procedures that comply with Generally Accepted Accounting Principles (GAAP).
- 30.06. Monitor and evaluate the integrity of financial reporting systems and audit programs.
- 30.07. Establish safeguards for the protection of the service provider's assets (such as insurance coverage, risk management).
- 30.08. Develop, implement, monitor, and evaluate systems to improve financial performance.
- 30.09. Manage and adjust expenses with fluctuations in census/occupancy/care recipient levels (such as staffing ratios).
- 30.10. Monitor and address changes in the industry that may affect financial viability.

### **40. Environment**

- 40.01. Ensure that physical environment policies and practices comply with applicable federal, state, and local laws, rules, and regulations
- 40.02. Ensure the planning, development, implementation, monitoring, and evaluation of a safe and secure environment
- 40.03. Ensure the planning, development, implementation, monitoring, and evaluation of infection control and sanitation.
- 40.04. Ensure the planning, development, implementation, monitoring, and evaluation of emergency and disaster preparedness program, including linkage to outside emergency agencies.
- 40.05. Ensure the planning, development, implementation, monitoring, and evaluation of environmental services, housekeeping and laundry.
- 40.06. Ensure the planning, development, implementation, monitoring, and evaluation of maintenance services for property, plant and all equipment, including preventative maintenance.
- 40.07. Ensure the planning, development, implementation, monitoring, and evaluation of appropriate HIPAA compliant technology infrastructure.
- 40.08. Establish, maintain, and monitor a physical environment that provides clean, safe, and secure home-like surroundings for care recipients, staff, and visitors
- 40.09. Identify opportunities to enhance the physical environment to meet changing market demands.

- 40.10. Establish, maintain, and monitor an environment that promotes choice, comfort, and dignity for care recipients.
- 40.11. Assess care recipients' environment for safety, security, and accessibility and make recommendation for referral or modification.

## **50. Management and Leadership**

- 50.01. Ensure compliance with applicable federal and state laws, rules, and regulations.
- 50.02. Promote ethical practice throughout the organization.
- 50.03. Develop, implement, monitor, and evaluate policies and procedures that comply with directives of governing body.
- 50.04. Develop, communicate, and champion the service provider's mission, vision, and values to stakeholders.
- 50.05. Develop, implement, and evaluate the strategic plan with governing body's endorsement.
- 50.06. Promote and monitor satisfaction of the care recipients and their support networks.
- 50.07. Identify, foster, and maintain positive relationships with key stakeholders.
- 50.08. Educate stakeholders on services provided, regulatory requirements, and standards of care.
- 50.09. Solicit information from appropriate stakeholders for use in decision making.
- 50.10. Manage the service provider's role throughout any survey/inspection process.
- 50.11. Develop and implement an intervention(s) or risk management program(s) to minimize or eliminate exposure.
- 50.12. Identify and respond to areas of potential legal liability.
- 50.13. Implement, monitor, and evaluate information management and technology systems to support service providers' operations.
- 50.14. Develop, implement, and monitor comprehensive sales, marketing, and public relations strategies
- 50.15. Ensure the written agreements between the care recipient and the service providers protect the rights and responsibilities of both parties.
- 50.16. Develop, implement, and evaluate the organization's quality assurance and performance improvement programs.
- 50.17. Lead organization change initiatives.
- 50.18. Facilitate effective internal and external communication strategies.
- 50.19. Promote professional development of all team members.

## **G. PROVIDER RESOURCES**

**Blooms Taxonomy:** <https://cft.vanderbilt.edu/guides-sub-pages/blooms-taxonomy/>

(A taxonomy created in 1956 by Dr. Benjamin Bloom to promote higher forms of thinking within education and is a good resource to use when writing learning objectives.)

**Continuing Education White Paper:**

[http://www.nabweb.org/filebin/pdf/Continuing\\_Education\\_White\\_Paper.pdf](http://www.nabweb.org/filebin/pdf/Continuing_Education_White_Paper.pdf)

(A white paper, written by Phillip Brown, defining continuing education and its role in developing continued competencies)

**NAB Website:** [www.nabweb.org](http://www.nabweb.org) (When visiting the NAB website, choose the Continuing Education option. This will provide information regarding the NAB Approved Program agenda, the Sponsor/User Agreement, and many other resources to aid providers of Continuing Education)

**S.M.A.R.T Goals/Objectives:** <http://www.yourcoach.be/en/coaching-tools/smart-goal-setting.php> and [https://en.wikipedia.org/wiki/SMART\\_criteria](https://en.wikipedia.org/wiki/SMART_criteria) (A useful tool to use as it provides information on how continuing education programs should be developed.)

## H. NAB GLOSSARY/COMMON ACRONYMS

**Domains of Practice** – The tasks performed by nursing home administrators along with the knowledge, skills, and abilities identified as necessary to perform those tasks by NAB as outlined within the professional practice analysis. The professional practice analysis summary can be found on the NAB website and is subject to change every five years.

**HSE™** -- HSE™ stands for “Health Services Executive”. Health Services Executives are individuals licensed at the state level, but has national entry level leadership competencies established for a nursing facility, assisted living community and home and community based service provider.

**NABVerify** – NABVerify is the national system used by NAB to:

- ✓ accept CE applications from sponsor members of NAB.
- ✓ submit/review HSE applications for qualified administrators.
- ✓ rack CE credits submitted to NAB by sponsor members in order for long term care licensee to use for licensure renewal.

**Private Programs** – A private program is one that is only available to a certain group of people, such as a company’s employees. It is not open to the public and it will not be included in the online NAB Approved CE Database. Please see CORPORATE (PRIVATE) PROGRAM ACCEPTANCE BY STATE BOARDS.

**Public Programs** – A public program is one that anyone can attend and is open to the public. It will be included in our online NAB Approved CE Database. <https://nab.learningbuilder.com/public/activitysearch>

**Self-Study** – These are programs that an individual would complete by oneself. These educational opportunities are completed without direct supervision or attendance in a classroom. NAB requires all self-studies have a posttest with a minimum of 5 question per hour of CE content. An archived webinar, digital media course, and a book study would all be considered as self-studies.

**Webinar** – A live presentation that takes place on the Internet at a set date and time. The benefits of this education type is that individuals are able to participate from many locations, can see/hear the presenter, and ask questions in real time. Although a live event, these programs are still considered as distance learning by NAB.