

## **ICEP Learning Portal Planning Consulting and Quality Assurance Meetings**

**Use the following guidance for scheduling course development consultation and/or quality assurance final course review meetings with the ICEP Learning Portal Technology Manager.**

### **Course Development Consultation**

Purpose: Discuss how the course(s)/registration should be built in Ethos when the course does not follow the typical structure or when the Accreditation Specialist has questions about the technology functionality and how to communicate this with the planners. Items to discuss include parent/child configuration, course formats, pricing options, coupons, enrollment options, special credit types and credit letters, how the course fits into current and future context for the partner, and special requests.

**Time allotted: .5 - .75 hours.**

Timing: This meeting should occur prior to providing options to the planners

Variables to take into consideration when determining the best build include adhering to accreditation criteria and standards, learner experience, issuing credit, ICEP resources (including people's time), cost, and sustainability.

**Follow-up Check-in Meetings:** When the course(s) is being built, periodic checks may be necessary.

Time allotted: .25 - .5

Timing: No less than two weeks before anticipated go live date.

The following course types or features may necessitate check-ins during the build process to avoid re-work:

- a. Courses with multiple instances of the same content: Courses offering multiple instances of the same content housed under a parent course: Schedule a review of the first course so that can be used as a template for the remaining.
- b. Courses with multiple pricing options, coupons, enrollment questions. (Details must be submitted to the Technology Manager no less than two weeks before the go live date.)
- c. Other Courses as determined during the initial meeting.

How to schedule a meeting:

Send a meeting invite to the Portal Technology Manager with the subject: <<Course Title>> New Course Consultation.

In the body of the invite provide details about the course, attach any agendas or other and any questions.

## Quality Assurance Course Review

*This applies to all courses in Ethos, including*

1. Courses with free registration
2. Courses with paid registration
3. Courses with backend enrollment/credit claiming

**Time:** Meeting should be scheduled for .25 hours per course being reviewed.

**Timing:** This meeting should be conducted after the entire course, including course objects and reminders, is complete, and prior to a course opening for registration.

There may be exceptions (for example, planners are not ready to provide virtual live event URLs) – please contact the Portal Technology Manager prior to the meeting to determine whether we will move forward with the review.

NOTE: When cloning a course, review and updated ALL variables. Date/time is not the only change that needs to be made. Common changes include: date/time, credit type or amount, add newest certificates, change the course format, updating wording regarding COI, accreditation statement, credit designation statement(s), add accessibility information, update the course outline, update reminders including any hyperlinks.

Use the guide below to check your course and verify all is accurate **prior** to attending the Quality Assurance Course Review.

### Quality Assurance Final Course Review Checklist

Item	Type of Course	Complete Before or During Final Review?
General Outward Facing Settings <ul style="list-style-type: none"> <li>• Dates</li> <li>• Instructions</li> <li>• Cancellation policy</li> <li>• Whether enrollments will close prior to event (live)</li> <li>• <a href="#">Accreditation and Credit Designation Statements</a> (and make sure they match the credit types/amounts and activity format) – including MOC statement if applicable (<i>Participant completion information will be shared with the &lt;Board&gt; through PARS. By recording your attendance at this event, you are giving UW-ICEP permission to share this information with &lt;Board&gt;.</i> Reference the UW ICEP Accreditation and Credit Designation Statement Document in the CE Planner Learning Community.</li> <li>• <a href="#">Faculty tab</a> – Disclosure Policy statement, faculty disclosure table (mitigated relationships). You need to insert a table, not link to a disclosure course.</li> </ul>	ALL	Before
Credit Types and Credit Letters	ALL	Before
Course Outline	ALL	Before

<ul style="list-style-type: none"> <li>• course objects</li> <li>• IF virtual, webinar links</li> <li>• required or optional</li> <li>• release dates</li> </ul>		
<b>Pricing, attributes, and coupons:</b> Submit to Portal Technology Manager 2 weeks prior to Quality Assurance Meeting	Paid	Before
<b>Enrollment type (enrollment questions):</b> Submit to Portal Technology Manager 2 weeks prior to Quality Assurance Meeting	Paid / Free	Before
Registration tab cancellation policy and accessibility	Paid / Free	Before
Course visibility (Show on catalog/calendar/transcript, search API) Course should be unpublished or hidden during setup.	ALL	During
Custom URL	ALL	Before or During
Automatic Email Reminders <ul style="list-style-type: none"> <li>• Enrollment email (all) – be sure to check which are on for parent/child relationships</li> <li>• Reminders before event (live)</li> <li>• Reminders after event (live)</li> <li>• Final reminder (live)</li> <li>• Regular reminders to complete (enduring)</li> <li>• End of year reminder(s) (enduring)</li> <li>• End of activity reminder (enduring)</li> <li>• 3-month follow up with survey (if applicable)</li> </ul>	ALL	Before
Enrollment Open/Closed	ALL	Before
<b>ACCME Tab:</b> Completed by Portal Technology Manager, indicates check is complete	ALL	During final check
Other		