
Policies and Procedures for Clinical Continuing Education Programs

1. **Records** - ACER will maintain a complete and accurate copy of the following records for each program offered. Records will be stored for 7 years. See ***Confidentiality of Participant Information regarding storage of records.***
 - a. Roster identifying program participants.
 - b. List of all live event program presenters, including presenter qualifications, a copy of the presenter's CV/ resume, and a description of the content presented by that presenter.
 - c. Clinical education program content description
 - d. Attendee/participant evaluations
 - e. Clinical education program promotional/marketing materials
 - f. Program agenda and materials distributed to participants, including the learning objectives.

2. **Confidentiality of Participant Information** - ACER will protect the confidentiality of participant information, including, but not limited to, participant identity and information and materials submitted to the organization by training participant(s). ACER will take the following steps to ensure participant confidentiality:
 - a. Provide a secure registration platform via the ACER website.
 - b. Provide a secure payment platform via the ACER website.
 - c. Restrict communication regarding participant(s) to secure communication platform managed by Metrocare Services
 - d. Store records that include participant information in a secure electronic location only accessible to the ACER Education and Strategic Initiatives team members who monitor registration and processing on behalf of the ACER Education team. *All secure platforms are managed by the internal IT department.*
 - e. Confidentiality regarding protected client information during live event programs will be addressed for participants in *Procedure for Training Event 1.c.* and for trainers in *Procedure for Trainer/Presenter/Author Submission, Verification and Program Approval 3. c.*
 - f. Limits to confidentiality: Metrocare reserves the right to pursue accreditation for educational programs that may require information to be shared when seeking accreditation, and limits may be expanded in the future to include access to accrediting bodies in question.

3. **Clinical Education Program Complaints** - During ACER training events, the trainer is granted the authority to address and resolve any concerns.
 - a. The trainer will do their due diligence to address concerns during the training, including making room adjustments (temperature, table configuration, increasing volume), addressing staff issues, etc.
 - b. If the trainer cannot resolve the participant's concerns, the complaints shall be presented in writing to the Associate Director of Clinical Education and Research of ACER by the complainant at acer@metrocareservices.org. All clinical education program complaints/disputes will be reviewed by the Associate Director of Clinical Education and Research of ACER within 5 business days. Consultation with the Executive Director of ACER may occur to determine an appropriate resolution and/or will be consulted when a participant is dissatisfied with the outcome of the complaint. Should the complaint be

against the Associate Director, the Executive Director will review the complaint instead and respond to the complainant within 5 business days. ACER seeks to engage in fair and equitable resolutions for all participants.

4. **Clinical Education Program fees - ACER reserves the right to determine appropriate fees as relates to** content, length, and trainer qualifications.
 - a. Each course will explicitly identify what participants can expect concerning fees, refunds, and cancellations initiated by either the Provider or the participant before enrolling in the training.
 - b. In most cases, Metrocare employees can complete ACER training for free. In special cases, a nominal fee may be assigned to a clinical education program based on training-related costs.
5. **Clinical Education Program Cancellation Policy** - ACER reserves the right to cancel any training 5 business days prior to the first day of the scheduled training if it does not meet its minimum attendance requirement of 8 participants. ACER is not responsible for reimbursing participants for any travel-related costs associated with cancellations due to attendance.
6. **Unforeseen Circumstances** - ACER recognizes that unforeseen and uncontrollable circumstances can occur, impacting training. Last-minute cancellations made by ACER due to inclement weather, natural disaster, or illness/death of a trainer or direct family member are unlikely but possible. In the event this occurs, ACER will communicate as soon as possible via email. In these circumstances, participants may receive credit for a future training event or be refunded full course fees. ACER is not responsible for reimbursing participants for any travel-related costs associated with cancellations due to unforeseen circumstances.
7. **Participant Cancellation Policy** - Participants may cancel registration up to 48 business hours before the first day of training. Cancellations must be in writing to the Associate Director of Clinical Education and Research at acer@metrocareservices.org.
8. **Attendance Policy** – ACER programs calculate, and issue credit measured as 1 credit for every 60 minutes of actual presentation time using one-quarter (.25) hour increments. Attendees seeking a certificate must follow the below attendance policies to receive credit for events:
 - a. Arrive promptly and be signed-in for the start of training,
 - b. Be physically present for the number of hours indicated on the certificate of completion,
 - c. Remain in the training until the trainer concludes the event and evaluation and sign-out procedures are complete.
 - d. Note: ACER will not offer any credit for partial attendance for same day training events. *This policy will be noted at registration and reiterated at the start of training and the recommendation will be that participants plan to arrive 10-15 prior to the start of training.*
 - e. Attendance policy fidelity during the event will be determined by the trainer of the event.
9. **No-Show Policy for In-person FREE CE Events – Due to limited space for live in-person events, individuals who register for FREE in-person live-format events and no-shows without a 48-hour cancellation (see policy above)** may lose the opportunity to register for these events in advance in the future. They may instead be put on the waitlist and sent an invite via email if space is available after registration closes, 4-5 business days before the day of the event.

10. Refunds

- a. If ACER cancels a scheduled training, participants will receive a full refund to their method of payment. Refunds will be processed within 7-10 business days from the date of cancellation.
- b. If the participant requests to cancel their registration, participants will receive a refund of their registration fee if cancellation is received 48 business hours before the event; Cancellations will be subject to a 30% cancellation fee. Refunds will be processed within 7-10 business days from the date of cancellation.
- c. Last-minute cancellations with less than 48 business hours notice will not be subject to refund.

11. Education Program Materials - ACER ensures that all qualifying clinical education program materials are professional in content and appearance, including all informational and advertising materials.

- a. ACER ensures all Clinical education program materials do not infringe upon or violate the intellectual property or privacy rights of another party, including copyright, trademark, and license rights.
- b. Any materials used are either owned by ACER, its affiliates, or the organization/trainer has received expressed permission to use such materials while giving appropriate credit to the original source.
- c. Materials created for continuing education are periodically updated and reviewed based on relevant research and findings.
- d. All clinical education training content shall be evidentially supported and cite relevant and up-to-date peer-reviewed sources.
- e. Content should be relevant to the population served at Metrocare and be developmentally supportive of the graduate-level clinical practitioners (and trainees) providing services at Metrocare services and/or clinicians serving individuals within Dallas County and surrounding communities.
- f. ACER will provide reasonable accommodation for participants who indicate accessibility needs in advance. *See ADA Accommodations for more information.*

12. ADA Accommodations for Training Events - Metrocare Services and The Altshuler Center for Education and Research are committed to complying with the Americans with Disabilities Act (ADA). As such, the following practices are consistent with ADA regulations:

- a. ACER staff should schedule all training at an ADA-compliant facility.
- b. Participants will be able to indicate specific accommodation needs at the time of registration. If food is served, participants will have the ability to report allergies or food restrictions at the time of registration so alternative options can be available. Should the event not require registration, event marketing materials will inform individuals of how to request accommodation. If participants accommodation needs are not reported at registration or 5 business days before the event, ACER cannot ensure the participant's needs will be met. This will be stated in the registration document.
- c. ACER will inform the trainer of any accommodation-related needs 5 business days prior to the training event so that modifications can be made to the training as needed.
- d. ACER will coordinate with the trainer should an interpreter needs be required for training events.

13. Clinical Education Program Advertising - ACER makes all clinical education program advertising and marketing materials available to the public without restriction, except for training commissioned by private organizations or those offered exclusively to Metrocare employees. All

marketing materials will be developed by Metrocare's marketing department in compliance with relevant standards for advertising and marketing.

14. Clinical Education Program Information Publication & Program Information Access -

ACER will make the following information available to the public, participants, and governing entities in a complete and accurate manner unless the clinical education training program is commissioned by a private organization or offered exclusively to Metrocare employees, in which case it will only be available to participants:

- a. Program registration requirements
- b. Program content description and learning objectives
- c. The name and qualifications of each program presenter or author
- d. The number of Certificate hours offered for completion of the program.
- e. The provider's contact information, including mailing address, telephone number, e-mail address, and website address.

15. Qualified Presenters & Relevant Content - All trainers/presenters/authors must be qualified based on relevant education and/or experience requirements to the content area being presented.

- a. ACER prefers all trainers/presenters/authors meet the following criteria: (Category 1) a graduate degree in a mental health field from a regionally accredited educational institution and be qualified by appropriate education, experience, and/or training to train/present/author on the subject matter. Trainers/presenters/authors must have demonstrated competency and experience in the content area discussed. ACER will also consider (Category 2) trainers/presenters/authors who *graduate degree from a regionally accredited educational institution directly related to the subject matter presented* under special circumstances.
- b. ACER reviews all training materials to ensure they relate to relevant content areas as outlined by the NBCC, the content areas are as follows: Counseling Theory/Practice and the Counseling Relationship, Human Growth and Development, Social and Cultural Foundations, Group Dynamics and Counseling, Career Development and Counseling, Assessment, Research and Program Evaluation, Counselor Professional Identity and Practice Issues, and Wellness and Prevention.
- c. Any material included in ACER clinical education programs that relates to the content areas of counseling theory, counseling practice, counseling relationships, and the evaluation and/or treatment of clients is presented/authored by a Category 1 Presenter which is an individual that holds a graduate degree in a mental health field from a regionally accredited educational institution (preferably CACREP or COAMTE accredited) and is qualified by appropriate education, experience, and/or training to train/present/author on the subject matter

16. Clinical Education Program Evaluation Policy - Evaluations are a required part of all ACER training.

- a. Evaluations are completed via pen and paper.
- b. Each evaluation includes the title and date of the program and gathers information on participant satisfaction in the areas of content, setting, faculty/presenter effectiveness, and instructional methods using a 1 to 5 Likert rating scale, with a 1 representing strong disagreement with the statement and a 5 representing strong agreement with the statement. A section for general comments and improvements is included.
- c. Evaluations are collected at the conclusion of every training event and are kept on file for seven years from the date of the program, in line with the record storage policy of Metrocare.

- d. Completed evaluations are reviewed by the presenter and the ACER administrative team. Feedback, both positive and negative, is viewed as an opportunity for growth and is used to inform future program events. ACER seeks to improve training based on feedback on participant experience, training content, and training staff. ACER may also improve the facility or organization of the event, updating topics or training content and/or improving the trainer’s approach and methods for training delivery based on findings.
- e. Any modifications made to the clinical education program based on participant evaluations are reported to the Associate Director of Clinical Education and Research and any governing authority before conducting the same program again.

17. ACER Provider Status & Maintenance – Metrocare’s ACER are not accredited continuing education providers but observe the right to apply for accreditation at any time. Should Metrocare’s ACER become a provider, their education team will ensure compliance with all policies including but not limited to:

- a. Offering relevant credit for each program that satisfies all Policy requirements.
- b. Displaying logos or trademarks of that accrediting body on all print and electronic program advertising, promotional and informational materials, and program website
- c. Notifying the accredited body concerning any changes or modifications to the program requirement.

Procedure for Training Event

1. Registration & Sign-In

- a. Participants register and complete payment online through a secure platform linked with ACER website: www.metrocareservices.org/acer-education/
- b. Participants must acknowledge the attendance, cancellation, and refund policy at registration.
- c. Participants must review and agree to acknowledge that they will not share information about their clients without informed consent from their clients for that event.
- d. A roster is generated based on registrations to use on the day of the training.
- e. The ACER event staff will ensure that sign-in procedures are completed. Sign-in procedures: A pen-and-paper “registration form” is available for registrants to sign in at the beginning of the event. Registrants are requested to provide their arrival time, first and last name, signature, and email address they registered with, as well as their license type and state of licensure.
- f. The trainer will review the attendance policy at the start of training.

2. Evaluations, Certificates & Sign-Out - Participants are provided with evaluation forms at the end of each ACER event.

- a. The training staff member is responsible for making an announcement requesting the completion of evaluation forms and explaining that certificates cannot be provided to the participant until ACER staff have received a completed pen and paper evaluation form.
- b. Instructions are given stating that once the evaluation is completed to submit the evaluation form and complete the sign-out procedures before leaving (time out and initials). *This announcement is made at the beginning of the training and is reiterated prior to the close of the educational event.*
- c. ACER staff will verify that all fields on the sign-in/sign-out sheet and the evaluation are complete prior to issuing the participants’ certificate.
- d. Once ACER staff have ensured all the required documentation is completed, the signed certificate is issued to the participant.
- e. Certificates for live-format programs include:

- a. The name and contact information for ACER;
- b. The title and date of the live program;
- c. The name of the participant to whom completion certificates are awarded;
- d. The number of hours completed by the named participant;
- e. The name and signature of the Associate Director of Clinical Education and Research
- f. The Altshuler Center for Education and Research; or name/number of entity granting certificate or hours

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