

Advocate Health IPCE RSS Renewal and End-of-Year Management Process

This process establishes a unified, standardized approach for the annual renewal, management, and end-of-year control of Regularly Scheduled Series (RSS) within Advocate Health's Interprofessional Continuing Education (IPCE) program. It integrates renewal requirements with year-end workload controls to ensure compliance, operational efficiency, and accreditation integrity.

1. Scope

This process applies to all IPCE Analysts, Activity Directors (ADs), planners, faculty, moderators, and supporting staff involved in the planning, renewal, administration, and evaluation of RSS activities.

2. Annual Renewal Timeline and Responsibilities

Phase 1: Intent to Renew (July)

- Activity Directors receive, via email, annual outcome summaries, and RSS evaluation results to confirm whether changes are anticipated for the upcoming calendar year.
- All planners, faculty, and moderators update their disclosure of financial relationships.

Phase 2: Intent to Renew Confirmed (August 15)

- Activity Directors must confirm intent to renew.
- All disclosures for ADs, planners, and all individuals influencing the education must be completed.

Phase 3: Analyst Review and Documentation (August 15 – October 15)

- IPCE Analysts confirm renewal status with Activity Directors and document any reported changes.
- Mitigation process will be initiated and completed.
- All supporting documentation (surveys, KRA data, attendance, bibliographies, grids, and credit audits) must be uploaded and current.

Phase 4: System and Accreditation Updates (By October 15)

- Analysts update RSS applications in CE Learning Platform with verified changes.
- Disclosure status is confirmed for all planners, faculty, and moderators. Session work will not be processed unless all disclosures for planning teams have not been completed.
- Approval letters, branding-compliant flyers, surveys, and session templates are prepared.

- RSS series pages are created for the new year when all documentation listed above is complete.

Phase 5: RSS Session builds and approvals (Starting Oct 16)

- If all documentation is complete, series will be published by October 15th.
- Planners/Coordinators will generate all session, upload documentation to platform and put sessions in “needs review” for approval.
- Only first quarter sessions will be processed at this time. Sessions should not be built out in advance for the year. If it is done, the sessions will be deleted, and the planner/coordinator will need to resubmit.
- Sessions cannot be promoted until approved by the IPCE team. IPCE team will approve sessions as they are submitted. Sessions are approved within 2 weeks of submission. However, during renewal season there may be delays.

3. End-of-Year Workload Control Measures

To protect compliance, staff capacity, and data integrity, the following controls apply annually:

- There will be a hold on new RSS CE applications from November 1 through January 31. Requests for new series will be considered February 1. (This does not include courses/enduring)
- Limit new initiatives, program changes, or added work requests are accepted during the year-end freeze period.

4. Disclosure and Credit Release Enforcement

Fourth quarter claiming credit codes will not be released until all required disclosures are completed by August 15th. Failure to do so could result in a delay for the following year.

5. Compliance and Review

Missing documentation or lack of responses from planning teams may result in delayed approvals, withheld credit codes, or non-renewal of RSS activities.