Accredited Continuing Education Record Retention Policy

Purpose

To ensure that participation and accredited activity records are available for credit verification, annual reporting, reaccreditation review, and responses to inquiries or complaints.

Scope

This policy applies to the Office of Continuing Professional Development (OCPD). OCPD is responsible for maintaining records for accredited continuing education activities, including activities certified for *AMA PRA Category 1 Credit™*.

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1. Attendance and credit records

OCPD will maintain a reliable record of attendance data for at least six years from the activity completion date. Records will identify the person, activity, participation or completion date, and credit claimed or awarded.

For *AMA PRA Category 1 Credit™*, documentation provided to a physician must accurately reflect the credit claimed or awarded and include the physician's name, accredited provider name, activity title, learning format, activity or completion date, and number of credits.

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2. Activity files

OCPD will retain records of activity planning and evaluation for the period required by the Accreditation Council for Continuing Medical Education (ACCME): the current accreditation term (four or six years, depending on commendation status) or the last 12 months, whichever is longer. Activity records are to be sufficient to document how the activity was planned and presented and to support required reporting and reaccreditation review.

Examples include the needs assessment and educational planning records, activity materials, disclosures and resolution documentation, attendance or participation information, evaluations, and records of credit designation. The applicable records will depend on the activity.

3. Storage, access, and disposal

Records may be maintained electronically or in paper form if they remain complete, readable, secure, and retrievable throughout the retention period. Access will be limited to staff with a legitimate business or accreditation need.

Records will not be destroyed if they are subject to an audit, accreditation review, complaint, investigation, litigation, or other preservation requirement. When the retention period has passed and no preservation requirement applies, records may be securely destroyed in accordance with institutional procedures.

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4. Learner data

OCPD will not sell or distribute learner data for commercial purposes. Course directors and planning committee members are prohibited from selling, sharing, disclosing, or otherwise distributing learner data to any person or organization outside OCPD. OCPD may report learner participation or credit to licensing, credentialing, or other boards only when the learner has provided consent through the Learning Management System. Learner data may otherwise be accessed or used only for purposes authorized by OCPD and necessary to plan, administer, evaluate, or document the accredited activity, or to meet applicable institutional requirements.

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