JOINT ACCREDITATION™
INTERPROFESSIONAL CONTINUING EDUCATION

GUIDE TO THE JOINT ACCREDITATION PROGRESS REPORT PROCESS
For Progress Reports to Be Reviewed in 2027

Joint Accreditation expects providers found to be in noncompliance with Core Joint Accreditation Criteria and/or applicable Joint Accreditation policies and requirements to demonstrate compliance through the progress report process. Descriptions of the specific performance issues that must be addressed in the progress report are provided in the decision materials from your recent review, along with the due date for your report. Noncompliance findings in the Menu of Criteria for Joint Commendation criteria should NOT be addressed in the progress report.

Progress Report Fee

There is a fee for the progress report. Providers will be sent an invoice for the fee and payment is requested upon receipt. Please submit payment to:

Joint Accreditation c/o ACPE
190 S. LaSalle Street, Suite 3000
Chicago, IL 60603-4810

Contents of a Progress Report

For the specific performance issues described for noncompliance findings, providers must:

- describe improvements and their implementation; and,
- where applicable, provide activity-level evidence to demonstrate compliance.

Expectations of Materials Submitted

All materials submitted to Joint Accreditation must contain only true statements, must not omit any necessary material facts, must not be misleading, must fairly present the organization, and must be the property of the organization. Materials submitted for accreditation (progress report, evidence of compliance in activity files, other materials) must not include individually identifiable health information, in accordance with the Health Insurance Portability and Accountability Act (HIPAA).

Decision-Making

Joint Accreditation expects providers found to be in noncompliance with Core Joint Accreditation Criteria and/or applicable Joint Accreditation policies and requirements to demonstrate compliance through the progress report process. Descriptions of the specific performance issues that must be addressed in the progress report are provided in the decision materials from your recent review, along with the due date for your report.

Providers will receive a decision from Joint Accreditation based on a review of all the information and materials submitted as part of the progress report. A progress report review may result in the following feedback from Joint Accreditation:

- **All Criteria Have Been Brought into Compliance:** The provider has demonstrated that it corrected the criteria or policies that were found to be in noncompliance. The Joint Accreditors may change the provider's joint accreditation status as a result of the findings of a progress report.
- **All Criteria Have Not Yet Been Brought into Compliance:** The provider has not demonstrated that it has corrected the criteria or policies that were found to be in noncompliance. Either a second report or a focused accreditation interview may be required. The Joint Accreditors may change the provider's joint accreditation status as a result of the findings of a progress report.

- **Clarification Required:** Additional information is required to be certain that the provider is in compliance. An additional progress report may be required, or the issue(s) may be assessed at the time of the next review.

There may be circumstances when a progress report is deferred to a future cohort, because, for example, a provider has not had sufficient time within the context of its CE program to implement improvements or to produce evidence to support compliance.

Submission Instructions

Please submit your organization's progress report electronically to info@jointaccreditation.org. Format the progress report as a single PDF that includes bookmarks to identify the criteria that you are addressing, your narrative descriptions and, where applicable, evidence from the three activities that you have selected for each of the criteria/policies that you are addressing.

Make all required submissions according to Joint Accreditation's specifications and by established deadlines. Failure to do so may result in a delay of your progress report review and/or a change of your organization's joint accreditation status. **Your submission must include:**

a) Narrative descriptions of improvements made in cited areas of noncompliance in the Core Joint Accreditation Criteria and/or applicable Joint Accreditation policies and requirements; and,

b) Evidence from three activities, as applicable.

You should address ONLY the Criteria or Policies cited as noncompliant in the decision materials from your recent review.

NOTE: For any activity evidence submitted, please provide the title, date, format, and target audience for the given activity.

Reporting Requirements for Joint Accreditation Criteria/Policies

The information below provides a guide for determining the content of the progress report to address noncompliance findings with Core Joint Accreditation Criteria and/or applicable Joint Accreditation policies and requirements. Responses should be developed in the context of the specific performance issue(s) identified in the decision materials from your recent review. Please contact Joint Accreditation staff if you have questions about what to include in your progress report.

Mission and Overall Program Improvement	
Area of Noncompliance	**Required for Progress Report**
JAC 1	*The provider has a continuing education (CE) mission statement that highlights education for the healthcare team with expected results articulated in terms of changes in skills/strategy, or performance of the healthcare team, and/or patient outcomes.* **Narrative Description:** **Provide** the expected results component of your CE mission statement. The expected results must be articulated in terms of changes in skills/strategy or performance of the healthcare team, and/or patient outcomes.

JAC 2	*The provider gathers data or information and conducts a program-based analysis on the degree to which its CE mission—as it relates to changes in skills/strategy, or performance of the healthcare team, and/or patient outcomes—has been met through the conduct of CE activities/educational interventions.* **Narrative Description:** **Describe** your organization's conclusions on the degree to which it has met the expected results of its CE mission. These conclusions should be based on the data you have obtained in your analysis of team and/or patient outcome change across your overall program of accredited activities.
JAC 3	*The provider identifies, plans and implements the needed or desired changes in the overall program (e.g., planners, teachers, infrastructure, methods, resources, facilities, interventions) that are required to improve its ability to meet the CE mission.* **Narrative Description:** **Describe** the needed or desired program changes that your organization identified, planned, and implemented since its last accreditation decision in order to improve its ability to meet its CE mission.

Activity Planning and Evaluation	
Area of Noncompliance	**Required for Progress Report**
JAC 4	*The provider incorporates into IPCE activities the educational needs (knowledge, skills/strategy, or performance) that underlie the practice gaps of the healthcare team and/or the individual members' knowledge, skills/strategy, or performance as members of the healthcare team.* **I. Narrative Description:** **Describe** how your organization identifies the professional practice gaps of the healthcare team/members and the educational needs that underlie these practice gaps. **II. Activity Files: For THREE of your organization's recent activities:** 1. **State** the professional practice gap(s) of your learners on which the activity was based. 2. **Indicate** the educational need(s) that apply to this activity: knowledge; skills/strategy; and/or performance. 3. **State** the educational need(s) that you determined to be the cause of the professional practice gap(s).
JAC 5	*The provider generates activities/educational interventions that are designed to change the skills/strategy, or performance of the healthcare team, and/or patient outcomes as described in its mission statement.* **I. Narrative Description:** **Describe** how your organization designs activities to change the skills/strategy or performance of the healthcare team, or patient outcomes. **II. Activity Files: For THREE of your organization's recent activities:** **Explain** what this activity was designed to change in terms of the healthcare team's skills/strategy or performance, or patient outcomes.

JAC 6	*The provider utilizes an integrated planning process that includes health care professionals who are reflective of the target audience the activity is designed to address.* **I. Narrative Description:** **Describe** how your organization's process for planning CE activities is reflective of the target audience for the activity. (*continued*)
JAC 6 (CONT.)	**II. Activity Files: For THREE of your organization's recent activities:** 1. **Explain** how the planning process for the activity was reflective of the activity's target audience.
JAC 7	*The provider designs education that promotes active learning – so that teams learn from, with, and about each other – consistent with the desired results of the activity.* **I. Narrative Description:** **Describe** the strategies your organization implements to ensure that its education is designed to promote active learning – so that teams learn from, with, and about each other – consistent with the desired results of the activity. **II. Activity Files: For THREE of your organization's recent activities:** **Explain** how the activity promotes active learning for the healthcare team that is consistent with the activity's desired results.
JAC 8	*The provider develops activities/educational interventions in the context of desirable attributes of the healthcare team (e.g., Institute of Medicine competencies, professional competencies, healthcare team competencies: values/ethics, roles and responsibilities, interprofessional communication, teams and teamwork).* **I. Narrative Description:** **Describe** how your activities/educational interventions are developed in the context of desirable attributes of the healthcare team. **II. Activity Files: For THREE of your organization's recent activities:** **State or list** the desirable attribute(s)/competency(ies) this activity addresses. **Describe** how these attribute(s)/competency(ies) were incorporated into the planning/development of the activity.
JAC 9	*The provider utilizes support strategies to sustain change as an adjunct to its educational interventions (e.g., reminders, patient feedback).* **I. Narrative Description:** **Describe** the support strategies your organization implements as an adjunct to its educational interventions in order to sustain change. **II. Activity Files: For THREE of your organization's recent activities:** **List** the specific support strategy(ies) used with this activity and **describe** how the strategy(ies) were designed to sustain change.

JAC 10	*The provider implements strategies to remove, overcome, or address barriers to change in the skills/strategy or performance of the healthcare team.* **Narrative Description:** **Describe** how your organization implements strategies to remove, overcome, or address barriers to change for the healthcare team. These instances might be specific to the planning of a CE activity or at the overall CE program level. **Include two examples** of different educational strategies that have been implemented to remove, overcome, or address barriers to the healthcare team.
JAC 11	*The provider analyzes changes in the healthcare team (skills/strategy, performance) and/or patient outcomes achieved as a result of its IPCE activities/educational interventions.* **I. Narrative Description:** Based on data and information from your program's activities/educational interventions, **provide** your analysis of changes in the healthcare team's skills/strategy, performance, or patient outcomes. **II. Activity Files: For THREE of your organization's recent activities:** **Describe** the strategies used to obtain data or information about changes achieved in the healthcare team's skills/strategy or performance or patient outcomes as a result of this activity, including, for example, questions you asked learners about changes in healthcare team skills/strategy or performance or other change data such as quality improvement or patient outcomes. **Submit** the data or information generated from the activity about changes achieved in the healthcare team's skills/strategy, performance, or patient outcomes. If available, also **include** a template of the evaluation tool or method used to obtain this information.

JAC 12 (Standards for Integrity and Independence)	
Area of Noncompliance	**Required for Progress Report**
JAC 12a (Standard 1)	*Standard 1: Ensure content is valid.* **I. Narrative Description:** **Describe** the processes and procedures your organization has in place to ensure that your accredited CE program, as well as the content of its CE activities, meet all four elements of Standard 1. **II. Activity Files: For THREE of your organization's recent activities:** **Include, or provide access to**, an unaltered set of CE materials as appropriate for the format of the activity: • If the activity is an Internet, Journal-Based, or Enduring Material CE activity, **include** the CE product itself, so reviewers may experience the activity as your learners experience it. With your submission, provide a URL/link to the activity and generic login(s) and password(s), if necessary for access. The product must be available for review from the point of submission through the end of your current accreditation term. If internet activities are no longer available online, you may provide access to an archived website. If this is not an option, please submit screenshots. • If the activity is a Regularly Scheduled Series (RSS): **Include** a listing of the

	dates, faculty, location, and topics of each session. • If the activity is any other type of activity: **Include** the activity topics/content, e.g., agenda, brochure, program book, or announcement. The documentation must include the nature and the scope of the content of the CE activity.
JAC 12b (Standard 2)	*Standard 2: Prevent commercial bias and marketing in accredited continuing education.* **I. Narrative Description:** **Provide** a narrative description of changes in your organization's processes and procedures 1. **For progress reports addressing noncompliance with elements 1 or 2 of Standard 2, describe** the processes and procedures your organization has in place to ensure that your organization, and the content of its accredited CE activities, meet expectations for elements 1 and 2. 2. **For progress reports addressing noncompliance with element 3 of Standard 2, describe** the processes and procedures your organization has in place to ensure that names are not shared without the explicit consent of learners. **II. Activity Files: For THREE of your organization's recent activities:** **Include, or provide access to** the required documentation described, for each activity, based on the type of activity as indicated in the JAC 12a - Standard 1 section of this guide. **Attest** that the activity meets the expectations of all three elements of Standard 2.

JAC 12c (Standard 3)	*Standard 3: Identify, mitigate, and disclose relevant financial relationships.* **I. Narrative Description:** **Describe** the process(es) you have in place to collect information from all planners, faculty, and others in control of educational content about all financial relationships with ineligible companies to meet the expectations of Standard 3.1 and that your process includes: a) the complete definition of an ineligible company and b) the individual completing the form/mechanism is instructed to include ALL financial relationships with ineligible companies for the prior 24 months. **Indicate** if your organization uses employees or owners of ineligible companies in its accredited activities. (Yes/No) • **If YES:** Describe the processes you have in place to meet the expectations of Standard 3.2 (a-c) **Describe** the process(es) you use to determine which financial relationships are relevant to the educational content. **Describe** the method(s) you use to mitigate all relevant financial relationships for individuals involved in the planning of CME activities, such as planner/editor/ reviewer roles. **Describe** the methods you use to mitigate all relevant financial relationships for individuals with speaker/author/moderator/facilitator roles. **Describe** the method(s) you use to inform learners of the presence or absence of relevant financial relationships of all individuals in control of content. **Describe** the method(s) you use to inform learners that all relevant financial relationships have been mitigated. **Describe** what you do to ensure that your organization does NOT engage in joint providerships with ineligible companies. (*continued*)

JAC 12c (Standard 3) (CONT.)	**II. Activity Files: For THREE of your organization's recent activities:** **Include, or provide access to** the required documentation described, for each activity, based on the type of activity as indicated in the JAC 12a - Standard 1 section of this guide. **Indicate,** for each activity, if the activity meets one of the exceptions listed below? (Yes/No) • Accredited education that is non-clinical, such as leadership or communication skills training. • Accredited education where the learner group is in control of content, such as a spontaneous case conversation among peers. • Accredited self-directed education where the learner controls their educational goals and reports on changes that resulted, such as learning from teaching, remediation, or a personal development plan. When accredited providers serve as a source of information for the self-directed learner, they should direct learners only to resources and methods for learning that are not controlled by ineligible companies. • **If YES: describe how the activity met the exception.** **Indicate,** for each activity, if owner(s)/employee(s) of ineligible companies participated as planners or faculty in the activity? (Yes/No) • **If YES:** for each owner/employee that participated in this activity, **Provide** information to demonstrate the individual's involvement meets one of the exceptional circumstances listed in Standard 3.2. **Indicate,** for each activity, if an ineligible company took the role of non-accredited partner in a joint provider relationship in this activity? (Yes/No) **Include,** for each activity, a single example of each of the form(s) or mechanism(s) that you use to collect information that meets the expectations of Standard 3.1. Ensure that this/these mechanism(s) include: i) the complete definition of an ineligible company ii) instructions to the individual completing the form/mechanism to include ALL financial relationships with ineligible companies for the prior 24 months. **Download and Complete** the spreadsheet linked HERE**,** for each activity, by providing information in each column for each individual in control of content, as applicable. **Include** each spreadsheet as a separate worksheet within a single EXCEL file. **Include,** for each activity, evidence of the disclosure about the presence or absence of relevant financial relationships for all individuals in control of CME content, *as it was presented to learners*. **Include,** for each activity, evidence of the statement that all relevant financial relationships were mitigated, if applicable, *as it was presented to learners*.

JAC 12d (Standard 4)	*Standard 4: Manage commercial support appropriately.* **I. Narrative Description:** 1. **Indicate** whether your organization accepts commercial support. (Yes/No) 2. **If YES: Describe** what processes and procedures your organization uses to ensure that it meets the expectations of all four elements of Standard 4. **II. Activity Files: For THREE of your organization's recent activities that received commercial support:** **Include, or provide access to** the required documentation described, for each activity, based on the type of activity as indicated in the JAC 12a - Standard 1 section of this guide. (**NOTE:** If your organization has not implemented an activity that received commercial support since receiving your accreditation decision, please indicate this in your narrative description. If this is the case, you do not need to submit Activity File evidence at this time.) 1. **Complete and submit** a table listing the name(s) of the commercial supporter(s) of the activity and the dollar value of any monetary commercial support and/or indicate in-kind support. 2. **Submit** each executed commercial support agreement for the activity. 3. **Submit** an income and expense statement for the activity that itemizes the source(s) of commercial support and details the receipt and expenditure of all the commercial support. 4. **Submit** evidence of the disclosure of commercial support (monetary and non-monetary), as it was presented to learners.
JAC 12e (Standard 5)	*Standard 5: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education* **I. Narrative Description:** **Indicate** whether your organization offers opportunities for ancillary activities, including advertising, sales, exhibits, or promotion for ineligible companies and/or nonaccredited education in conjunction with its accredited CE activities? (Yes/No) If **YES: Describe** what your organization does to meet the expectations of all three elements of Standard 5**.** **II. Activity Files: For THREE of your organization's recent activities that offered ancillary activities:** **Include, or provide access to** the required documentation described, for each activity, based on the type of activity as indicated in the JAC 12a - Standard 1 section of this guide. **Indicate** if the activity included ancillary activities. **If the activity included ancillary activities …** **Describe** what you did to ensure that the education was separate from marketing by ineligible companies—including advertising, sales, exhibits, and promotion—and from nonaccredited education offered in conjunction with the activity. **Include** the activity materials if advertising or marketing for or on behalf of ineligible companies was permitted in any materials associated with the activity. OR **Include** evidence to demonstrate that it was separated in space and/or time from the accredited education if nonaccredited education was allowed.

Please contact Joint Accreditation staff by email at info@jointaccreditation.org if you have any questions about Joint Accreditation's progress report review process.