



**Academy**  
*of General Dentistry*

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***PACE***  
**Program Approval for  
Continuing Education**

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# PACE PROGRAM GUIDELINES

REVISED MAY 2016

Academy of General Dentistry

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The AGD PACE Program Guides are subject to modification from time to time by the AGD at its discretion. The most current edition of this document can be accessed at:

<http://www.agd.org/education-events/pace/pace-guidelines.aspx>

Information on how to successfully apply PACE Criteria to continuing education programs can be accessed at:

<http://www.agd.org/education-events/pace/apply-for-pace-approval.aspx>

# Standard IV Needs Assessment

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1. Program providers must utilize identifiable mechanisms to determine objectively the current professional needs and interests of the intended audience, and the content of the program must be based upon these needs.

## Criteria

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- A. The program planner must be responsible for carrying out or coordinating needs assessment procedures.
- B. Identified needs/interests must be developed from data sources that go beyond the program provider's own perceptions of needs/interests.
- C. The program provider must document the process used to identify needs/interests and must include input from the provider's advisory committee.
- D. The program provider must state the needs/interests identified and indicate how the assessment is used in planning educational activities.
- E. The program provider must involve members of the intended audience in the assessment of their own educational needs/interests.
- F. Consistent use of needs assessment data from multiple sources is required for use in planning continuing education activities.

# Standard V Objectives

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1. Specific written educational objectives identifying the expected learner outcomes must be developed for each activity and published in advance for the intended audience.

## Criteria

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- A. The program planner must be ultimately responsible for assuring that appropriate objectives are developed for each activity. The educational objectives may, however, be prepared by instructor, course director, or program planner.
- B. Educational objectives must be developed for each activity during the earliest planning stages. These provide direction in selecting specific course content and choosing appropriate educational methodologies.
- C. The written educational objectives must be published and distributed to the intended audience as a mechanism for potential attendees to select courses on a sound basis.
- D. Educational objectives must not conflict with or appear to violate the ADA Principle of Ethics and Code of Professional Conduct.
- E. For conventions and major dental meetings that involve multiple course topics and speakers present during a multi-day period it is sufficient to publish detailed course descriptions that enable participants to select appropriate course offerings however it shall be the responsibility of the provider to ensure that the individual courses presents are following the guidelines in their presentations.

## Recommendations

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- A. Educational objectives shall form the basis of evaluating the effectiveness of the learning activity.

**NOTE:** Accurate educational objectives succinctly describe the education that will result from attending the course. Specific educational objectives must describe the expected outcome(s) of the learning experience. They may include, but are not limited to, the following categories:

1. Changes in the attitude and approach of the learner to the solution of dental problems;
2. Corrections of outdated knowledge;
3. Provision of new knowledge in specific areas;
4. Introduction to and/or mastery of specific skills and techniques;
5. Alterations in the habits of the learner.

# Standard VI Admissions

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1. In general, continuing education activities must be made available to all dentists.
2. If activities require previous training or preparation, the necessary level of knowledge, skill, or experience must be specified in course announcements.

## *Criteria*

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- A. As an activity is designed, the program planner may determine that previous training or preparation is necessary for learners to participate effectively in the activity. In all such cases, the program provider must:
1. Provide a precise definition of knowledge, skill, or experience required for admission;
  2. Demonstrate the necessity for any admission restriction, based on course content and educational objectives;
  3. Specify in advance and make available a method whereby applicants for admission may demonstrate that they have met the requirement;
  4. Develop methods that are objective, specific, and clearly related to the course content and stated requirements;
  5. If attendees are required to provide materials and equipment, the program provider must make this requirement clear to potential enrollees and must provide enrollees with specific descriptions of all equipment and materials required.

## *Recommendations*

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- A. Where activities are offered at an advanced level, program providers are encouraged to provide sequentially planned instruction at basic and intermediate levels, to allow participants to prepare for the advanced activity. Though program providers are not obligated to provide CDE activities for all dental occupational groups, admission policies that discriminate arbitrarily against individuals within an occupational group, without a sound educational rationale, are not acceptable. Where restrictive registration requirements have been determined to be necessary on the basis of the foregoing Standards and Criteria, course applicants might demonstrate compliance with the requirements through documentation of attendance at CDE activities, submission of patient treatment records, or actual demonstration of required skills or knowledge.

# Standard VII Patient Protection

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1. Participants must be cautioned about the hazards of using limited knowledge when integrating new techniques into their practices.
2. Where patient treatment is involved, either by course participants or instructors, patient protection must be ensured as follows:
  - a. The program provider must seek assurance prior to the course that participants possess the basic skill, knowledge, and expertise necessary to assimilate instruction and perform the treatment techniques being taught in the course.
  - b. Informed consent from the patient must be obtained in writing prior to treatment.
  - c. Appropriate equipment and instruments must be available and in good working order.
  - d. Adequate and appropriate arrangements and/or facilities for emergency and postoperative care must exist.

## *Criteria*

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- A. Participants must be cautioned about the dangers of incorporating techniques and procedures into their practices if the course has not provided them with adequate, supervised clinical experience in the technique or procedure to allow them to perform it competently.
- B. The program provider must assume responsibility for assuring that participants treating patients (especially those from outside the state/province where the course is held) are not doing so in violation of state dental licensure laws.
- C. The program provider is responsible for obtaining the informed consent of all patients.
- D. Patients must be informed, in non-technical language, of:
  1. The training situation;
  2. The nature and extent of the treatment to be rendered;
  3. Any benefits or potential harm that may result from the procedure;
  4. Available alternative procedures;
  5. Their right to discontinue treatment.
- E. The program provider must assume responsibility for completion of treatment by a qualified clinician, should any question of the course participant's competence arise.
- F. There can be no compromise in adequate and appropriate provisions for care of patients treated during CDE activities; aseptic conditions (where possible, and, where not possible, antiseptic conditions), equipment, and instruments, as well as emergency care facilities, must be provided.
- G. Sufficient clinical supervision must be provided during patient treatment to ensure that the procedures are performed competently.
- H. The program provider must assume responsibility for providing the necessary post-course treatment, either through the practitioner who treated the patient during the course or through some alternative arrangement.
- I. Program providers, instructors, and participants should have adequate liability protection.

## *Recommendations*

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- A. In order to meet course objectives, patients should be screened prior to the course to ensure that an adequate number is present, with conditions requiring the type of treatment relevant to the course content.
- B. Program providers are advised to consult legal counsel regarding informed consent requirements in their locale and appropriate procedures for obtaining patient consent.

# Standard VIII Instructors

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1. Instructors chosen to teach courses must be qualified by education and/or experience to provide instruction in the relevant subject matter.
2. The number of instructors employed for a CDE activity must be adequate to ensure effective educational results.
3. Providers must ensure that instructors support clinical recommendations with references from the scientific literature whenever possible. References must have a sound scientific basis, as defined in the Lexicon of Terms. References must be published and/or translated into English.

## *Criteria*

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- A. Program providers must assume responsibility for communicating specific course objectives and design to instructors early in the planning process.
- B. The number of instructors assigned to any activity must be predicated upon the course objectives and the educational methods used.
- C. The instructor-to-attendee ratio is most critical in participation courses. Great care must be taken to ensure that close supervision and adequate direct interchange between participants and instructors will take place. The instructor-to-attendee should not exceed 1:15 during any hands-on activities.
- D. CDE providers that utilize one instructor to present 50% or more of the provider's CDE activities must submit a Curriculum Vitae containing complete information on the instructor's education, professional training, positions held, publication and presentation history when applying for the AGD PACE recognition.
- E. CDE program providers must assume responsibility for taking steps to ensure that images presented in courses have not been falsified or misrepresent the outcome of treatment. Signed affidavits of image authenticity must be obtained from all faculty members.

## *Recommendations*

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- A. Program providers should work closely with instructors during course planning to ensure that the stated objectives will be addressed by the presentation.
- B. Each program provider should have a carefully formulated plan for selecting qualified instructors. A wide variety of sources for qualified instructors should be explored and utilized.
- C. The teaching staff for any CDE program should consist of dentists and other professionals in related disciplines who have demonstrated ability, training, and experience in the relevant fields.
- D. Instructors should also possess the demonstrated ability to communicate effectively with professional colleagues, and possess an understanding of the principles and methods of adult education.
- E. Expertise and assistance in development and use of instructional materials and aids, when needed, should be available to support the teaching staff.
- F. Program providers should develop clearly defined policies on honoraria and expense reimbursement for instructors.

# Standard IX Publicity

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1. Publicity must be informative and not misleading. It must include:
  - a. Course title
  - b. A description of course content
  - c. The educational objectives
  - d. A description of teaching methods to be used
  - e. Costs
  - f. The name of the program provider, joint-providers and contact person
  - g. Course instructor(s), their qualifications, and any conflict of interest
  - h. Refund and cancellation policies
  - i. Location
  - j. Date
  - k. Specify number of hours awarded by educational methods used (lecture, clinical participation, self-instruction, etc.) and AGD subject code
  - l. Time and period of availability for internet-based courses
  - m. The names of any entities providing commercial support
2. For effective presentation and assimilation of course content, the prior level of skill, knowledge, or experience required (or suggested) of participants must be clearly specified in publicity materials.

## Criteria

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- A. Any publicity for CDE activities must provide complete and accurate information to the potential audience.
  - B. Care must be taken to avoid misleading statements regarding the nature of the activity or the benefits to be derived from participation.
  - C. Accurate statements concerning credits or approvals granted for the activity must be included. Great care must be taken to ensure that such statements follow the wording prescribed by the agency granting the credits or approvals, so that participants cannot misinterpret them.
  - D. Approved program providers must use the approved AGD PACE logo/brand with the appropriate credit statement in all printed brochures and promotional materials for their educational program.
  - E. The terms “accredited,” “accreditation,” “certification” or “endorsement of” must not be used in conjunction with PACE approval. Providers must not make statement implying AGD PACE Approval or endorsement of individual courses.
  - F. If the program provider requires the continuing dental education course(s) to gain access to its services and/or products, any and all guidelines or limitations pertaining to prospective course participants’ access to said services and/or products must be disclosed, in any and all publicity, including any initial registration packet for the course(s) such that prospective participants are fully aware of these guidelines and limitations.
  - G. Providers that offer self-instructional activities must publish the following information on publicity materials for the activity and in the activity itself:
    - a. Original release date;
    - b. Review date (if activity is reviewed and rereleased);
    - c. Expiration date (a maximum of 3 years from the original release date or the last review date, whichever is most recent).
- NOTE:** The program provider must submit with the application up to five samples of publicity from the past twelve months, from all forms of media (i.e., printed advertisements, radio spots, on-line postings, etc.) in print format.
- The attendees’ expectations concerning course content and anticipated learning are based on course publicity. Materials containing less than complete and accurate information will almost always result in disappointment and dissatisfaction on the part of all or some attendees. Further, complete and detailed publicity materials will help to ensure that those who want and need the course will attend, and that they will be motivated to learn

## Using the AGD PACE Logo

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PROVIDER is designated as an Approved PACE Program Provider by the Academy of General Dentistry. The formal continuing dental education programs of this program provider are accepted by AGD for Fellowship, Mastership and membership maintenance credit. Approval does not imply acceptance by a state or provincial board of dentistry or AGD endorsement. The current term of approval extends from (DATE to DATE).  
Provider ID <AGD ID Number>



Approved PACE Program Provider  
FAGD/MAGD Credit  
Approval does not imply acceptance by a state or provincial board of dentistry or AGD endorsement.  
(DATE) to (DATE)  
Provider ID <AGD ID Number>

- The AGD PACE Logo should be between 3/4 of an inch and two inches in height and not be larger than the provider's logo
- Either one of the above approval statements must appear in your promotional copy placed either under or directly to the right of the AGD PACE Logo.
- Type size should not be less than 6 point. Type style should be san serif (Helvetica, Ariel, etc.).

# Standard X Evaluation

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1. The program provider must develop and utilize activity evaluation mechanisms that:
  - a. Are appropriate to the objectives and educational methods;
  - b. Measure the extent to which course objectives have been accomplished
  - c. Assess course content, instructor effectiveness, and overall administration

## *Criteria*

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- A. The program provider must provide an evaluation mechanism that will allow participants to assess their achievement of personal objectives. Such mechanisms must be content-oriented and provide feedback to participants so that they can assess their mastery of the material. This is especially important if the activity is self-instructional in nature. The educational objectives for the activity must form the basis for the evaluation.
- B. The program provider must provide an evaluation mechanism that will help the program provider assess the effectiveness of the CDE activity and the level at which stated objectives were fulfilled, with the goal being continual improvement of the program provider's activities.
- C. The program provider is required to periodically conduct an internal review of completed course evaluations to determine:
  1. The extent to which the goals are being achieved;
  2. The extent to which activity evaluation effectively and appropriately assesses:
    - a. Educational objectives;
    - b. Quality of the instructional process;
    - c. Participants' perception of enhanced profession effectiveness;
  3. If evaluation methods are appropriate to and consistent with the scope of the activity;
  4. How effectively activity evaluation data are used in planning future CDE activities.
- D. The advisory committee must be involved in the provider's periodic assessment of the effectiveness of its continuing education program.

## *Recommendations*

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- A. Minimally, the evaluation mechanisms should:
  1. Be appropriate to the educational objectives and methods for the activity;
  2. Measure the extent to which objectives have been met;
  3. Determine participant assessment of course content with regard to whether it was practically useful, comprehensive, appropriate, and adequately in-depth;
  4. Assess instructor effectiveness;
  5. Assess adequacy of facilities;
  6. Assess overall administration of the activity.
- B. The program provider should provide feedback to the instructor concerning the information that evaluation of the CDE activity has produced.

# Standard XI Course Records

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1. Program providers must maintain accurate records of individual attendance and make such records accessible to attendees for a minimum of seven years or more if required by local or national regulations.
2. Any record supplied in connection with the continuing education activity must not be, nor resemble, a certificate or diploma that attests to or might appear to attest to specific skill, specialty, or advanced educational status. Providers must design such documentation to avoid misinterpretation by the public or professional colleagues.
3. Credit awarded to participants of an approved program provider's educational activity must be in compliance with AGD policies related to credit allocation.
4. Effective January 1, 2017, program providers must submit continuing education credits for lecture and participation hours for all AGD member attendees directly to the AGD through the AGD online roster within 30 days. Self-instruction hours may be submitted to the AGD using the AGD online roster or the AGD-approved standardized roster submission forms.

## Criteria

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- A. Program providers must accept the responsibility of maintaining accurate records of individual attendees at each activity, to accommodate the growing number of legal and professional requirements.
  1. Rosters submitted using incorrect forms or with missing information will be returned to the program provider for completion. Corrected rosters must be returned to the AGD within 21 days.
- B. Credit must be awarded based on the following calculations:
  1. For formal structured lectures, credit will be awarded based on actual number of contact hours. No credit will be awarded if the course is less than one hour in duration.
  2. For courses in which at least 30% of course content involves the participant in the active manipulation of dental materials or devices, the treatment of patients, or other opportunities to practice skills or techniques under the direct supervision of a qualified instructor, participation credit will be awarded based on actual number of contact hours (excluding meals and registration periods).
  3. Participants who complete audio, audio-visual, or electronically delivered self-instructional programs must receive credit equal to the length of the instructional time with a minimum being one half an hour (30 minutes) of credit.
  4. Participants who complete self-paced self-instructional programs must receive credit based on an educator's estimate of the time required to complete the program, with the minimum being one half an hour credit (30 minutes) and the maximum being eight credit hours.
  5. For protocol courses, credit will be awarded hour-for-hour for the formal, on-site session(s). The amount of credit for the homework component must not exceed, but may be less than, the amount of credit awarded for the initial formal on-site session(s) and be commensurate with the level of difficulty of the homework assignment. Additional credit will be awarded hour-for-hour for the case presentation session. To determine if hours are participation or lecture, use these conditions:
    - a. If the participant completes the formal on-site session(s), does the homework component and passes the final case presentation all hours awarded may be coded as participation.
    - b. If a participant does not complete all these components (on-site lecture session, homework and case presentation) participation credit can only be awarded if the initial demonstration session(s) contained hands-on activities and as defined in Standard XI.B.2 above.
- C. Providers must issue accurate records of individual participation to attendees.
- D. Verification of participation documentation must clearly indicate at least:
  1. The name and PACE provider ID number of the program provider;
  2. The date(s), location and duration of the activity;
  3. The title of the activity and specific AGD subject codes;
  4. Educational methods used (e.g., lecture, clinical participation, self-instruction)
  5. Number of credit hours (excluding meals);
  6. A course completion code for each educational activity.
    - a. When attendees can attend one or more portions of a program, completion codes should be issued at the end of each portion of the program.
  7. The name of the participant
  8. The title of each individual CDE course the participant has attended or successfully completed as part of a large dental meeting or other similar activity (and number of credits awarded for each)
  9. The recognition status of the provider, through the use of the authorized statement, and, whenever feasible (given space considerations) the use of the AGD PACE logo in conjunction with the authorized approval statement. (See page 19.)

## *Recommendations*

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- A. Program providers should be aware of the professional and legal requirements for continuing dental education that may affect their participants.
- B. Program providers should cooperate with course participants and with requiring agencies in providing documentation of course attendance at the end of each educational activity, as necessary. Electronic scanning devices to collect participant information should be used at the end of each educational activity.

# Standard XII Commercial or Promotional Conflict of Interest

In 1997 the U.S. Food and Drug Administration (FDA) issued a policy statement entitled “Guidance for Industry: Industry Supported Scientific and Educational Activities.” This policy states that activities designed to market or promote the products of a commercial company are subject to FDA regulation under the labeling and advertising provisions of the Federal Food, Drug and Cosmetic Act, whereas.

Activities that are independent of commercial influence and non-promotional are not. In this context, the AGD PACE standards and criteria are designed to ensure separation of promotional activities from continuing education activities in the following ways: 1) CDE providers must demonstrate that all educational activities offered are independent of commercial influence, either direct or indirect, and 2) CDE providers must ensure that all financial relationships between the provider and commercial entities, as well as all financial relationships between course planners and faculty and commercial entities are fully disclosed to participants.

1. The PACE standards and criteria are designed to ensure that:

- a. CDE providers must ensure that continuing education activities promote improvements in oral healthcare and not a specific drug, device, service or technique of a commercial entity.
- b. If commercial relationships exist between the program provider, course presenters, and/or a commercial company and its products, they must be fully disclosed to participants.
- c. Providers must disclose to participants in CDE activities any conflicts of interest the planners and lecturer/author/instructors or a continuing education activity may have. Disclosure must be made at the beginning of the continuing education activity and must be made in writing in publicity materials, course materials and/or audiovisual materials.
- d. Financial aid is acknowledged in printed announcements and brochures.

## Criteria

- A. CDE program providers must assume responsibility for ensuring the content quality and scientific integrity of all CDE activities. Educational objectives, course content, teaching methods, instructors and advisors must be selected independent of commercial interest.
- B. CDE program providers must operate in accordance with written guidelines and policies that clearly place the responsibility for program content and faculty selection on the program provider. These guidelines must not conflict with the PACE Standards/Criteria for Approval. Each CDE learning experience offered must conform to this policy.
- C. The ultimate decision regarding funding arrangements for CDE activities must be the responsibility of the CDE program provider. CDE activities may be supported by funds received from external sources if such funds are unrestricted. External funding must be disclosed to participants 1) in announcements, brochures, or other educational materials, and 2) in the presentation itself.
- D. CDE program providers receiving commercial support must develop and apply a written statement or letter of agreement outlining the terms and conditions of the arrangement and/or relationship between the program provider and the commercial supporter.
- E. CDE program providers and instructors must disclose to participants any monetary or other special interest the program provider may have with any company whose products are discussed in its CDE activities. Disclosure must be made in publicity materials and at the beginning of the presentation itself.
- F. Product-promotion material or product-specific advertisement of any type is prohibited in or during CDE activities. Live promotional activities (staffed exhibits, presentations) or enduring promotional activities (print or electronic advertisements) must be kept separate from CDE. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided during CDE activities.
  - a. For live, face-to-face CDE, advertisements and promotional materials cannot be displayed or distributed in the educational space during a CDE activity. Providers cannot allow presenters or representatives of Commercial Interests to engage in sales or promotional activities during the CDE activity.
  - b. For print CDE activities, advertisements and promotional materials will not be interleaved within the pages of the CDE content. Advertisements and promotional materials may face the first or last pages of printed CDE content as long as these materials are not related to the CDE content they face and are not paid for by the commercial supporters of the CDE activity.
  - c. For electronically mediated/computer based CDE activities, advertisements and promotional materials will not be visible on the screen at the same time as the CDE content and not interleaved between computer ‘windows’ or screens of the CDE content.

- d. For audio-and video-based CDE activities, advertisements and promotional materials will not be included within the CDE. There will be no 'commercial breaks.'
  - e. Educational materials that are part of a CDE activity, such as slides, abstracts and handouts, cannot contain any advertising, trade name or a product-group message.
  - f. Print or electronic information distributed about the non- CDE elements of a CDE activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product promotion material or product-specific advertisement.
- G. Arrangements for commercial exhibits or advertisements must not influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CDE activities.
- H. CDE program providers must ensure that a balanced view of all therapeutic options is presented. Whenever possible, generic names must be used to contribute to the impartiality of the program presented.
- I.. CDE program providers must assume responsibility for the specific content and use of instructional materials that are prepared with outside financial support.
- J. CE program providers must assume responsibility for taking steps to protect against and/or disclose any conflict of interest of the advisory committee, CDE activity planners, course directors and lecturer/author/ instructors presenting courses. Signed conflict of interest statements must be obtained from all advisory committee members, CDE activity planners, course directors and lecturer/author.
- K. If providing electronically mediated distance learning, embedded advertising and direct commercial links are inappropriate within the educational content and must be avoided.
- L CDE providers that also offer activities designed to promote drugs, devices, services or techniques must clearly disclose the promotional nature of the activity in publicity materials and in the activity itself. The CDE hours awarded must not include the promotional hours.
- M. The advisory committee must be involved in evaluating and taking steps to protect against conflicts of interest that CDE activity planners, course directors and lecturer/author/instructors may have.

### *Recommendations*

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- A. The following are examples of outside or commercial support that is customary and proper: payment of reasonable honoraria, reimbursement of out-of-pocket expenses for faculty, and modest meals or social events held as part of the educational activity.
- B. The CDE program provider and the commercial supporter or other relevant parties should each report to the other on the expenditure of funds each has provided, following each subsidized CDE activity.

# Lexicon of Terms

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Many discussions of CDE result in misinterpretation or confusion because frequently used terms may be defined differently in the context of continuing education (CE). To clarify the intent of this document, the following terms are defined as they will be used in relation to CDE. CDE providers should familiarize themselves with these definitions to ensure complete understanding of information provided in this document.

**ACTIVITY:** An individual educational experience such as a lecture, clinic, or home-study package. (See COURSE)

**ADMINISTRATIVE AUTHORITY:** The person(s) responsible for the coordination, organization and dissemination of planned CDE offerings. Typically, it is an employee of the provider; the provider is responsible for the overall quality.

**ADVISORY COMMITTEE:** An objective entity that provides peer review and direction for the program and the provider. A majority of the committee must be dental professionals, including at least one licensed practicing dentist who is independent from other responsibilities for the provider. The composition of the advisory committee should include objective representatives of the intended audience, including the members of the dental team for which the courses are offered.

**BEST PRACTICES:** Those strategies, methods, activities, or approaches that have been shown through research and evaluation to effectively promote continuous quality improvement of CDE in accordance with the ADA CERP Recognition Standards and Procedures AGD PACE Program Guidebook.

**COMMERCIAL BIAS/COMMERCIAL INFLUENCE:** Any activity or material designed to promote a specific proprietary business interest or entity with a commercial interest.

**COMMERCIAL INTEREST/COMMERCIAL ENTITY:** Any proprietary entity producing health care goods or services, with the exception of non-profit or government.

**COMMERCIAL SUPPORT:** Financial support, products, and other resources contributed to support or offset expenses or needs associated with a provider's CDE activity.

**COMMERCIAL SUPPORTER:** Entities which contribute financial support, products, and other resources to support or offset expenses and /or needs associated with a provider's CDE activity.

**CONFLICT OF INTEREST:** When an individual has an opportunity to affect CDE content with products or services from a commercial interest with which he/she has a financial relationship.

**CONTACT HOUR:** Unit of time equal to a minimum of fifty (50) minutes and not more than sixty (60) minutes.

**CONTINUING DENTAL EDUCATION (CDE):** Educational activities designed to review existing concepts and techniques, to convey information beyond basic dental education, and to update knowledge on advances in dental and medical sciences. The objective is to improve the knowledge, skills, and ability of the individual to deliver the highest quality of service to the public and profession. The basic sciences and behavioral and social sciences should be considered inseparable from technical knowledge in their influence on the professional person and, for this reason, educational experiences in these areas are an equally valid part of CDE.

CDE programs are usually of short duration and are not structured or sequenced to provide academic credit toward a certificate or degree. Such courses are not applicable to advanced standing in specialty education programs. CDE courses are conducted in a wide variety of forms using many methods and techniques and are sponsored by a diverse group of institutions, schools, and organizations. CDE should favorably enrich past educational experience. These programs should make it possible for dentists and allied team members to attune dental practice to modern knowledge as it continuously becomes available. All CDE should strengthen the habits of critical inquiry and balanced judgment that denote the truly professional and scientific person.

**COURSE:** A type of CDE activity; usually implies a planned and formally conducted learning experience. (See ACTIVITY)

**COURSE COMPLETION CODE:** Also referred to as Verification code. Random code announced by program provider toward the end of each course to help verify that each participant has taken part in the entire course.

**EDUCATIONAL METHODS, METHODOLOGIES:** The systematic plan or procedure by which information or educational material is made available to the learner. Some examples include lectures, discussions, practice under supervision, audiovisual self-instructional units, case presentations, and Internet-based or other electronically mediated formats.

**ELECTRONICALLY MEDIATED LEARNING:** Continuing education activities that use one or more of the following technologies to deliver instruction to participants who are separated from the instructor and to support interaction between the participants and the instructor: (1) the internet; (2) one-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices; (3) audio conferencing; or (4) DVDs, CD-ROMs, and videocassettes if these are used in a course in conjunction with any of the other technologies listed. Electronically mediated learning may be delivered through live courses or self-instructional activities.

**EVIDENCE-BASED DENTISTRY:** An approach to oral health care that requires the judicious integration of systematic assessments of clinically relevant scientific evidence, relating to the patient's oral and medical condition and history, with the dentist's clinical expertise and the patient's treatment needs and preferences. (See *Center for Evidence-Based Dentistry* at <http://ebd.ada.org>.)

**FINANCIAL RELATIONSHIPS:** Any relationship in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest contracted research, or other financial benefit or. The AGD considers relationships of the person involved in the CDE activity to include financial relationships of a family member. Financial relationships must be disclosed to the participants.

**GOAL:** A statement of long-range expectations of a CDE program.

**JOINT PROGRAM PROVIDER:** An AGD PACE-recognized or non-AGD PACE-recognized provider that shares responsibility with an AGD PACE-recognized provider of CDE for planning, organizing, administering, publicizing, presenting, and keeping records for a program of CDE. Administrative responsibility for development, distribution, and/or presentation of CDE activities must rest with the AGD PACE-recognized provider whenever the provider acts in cooperation with providers that are not recognized by AGD PACE. When two or more AGD PACE-recognized providers act in cooperation to develop, distribute, and/or present an activity, each must be equally and fully responsible for ensuring compliance with these standards.

**JOINT PROVIDERSHIP (or co-providership):** Any continuing education activity in which an AGD PACE-approved provider agrees to jointly offer a program with another CDE program provider. When an AGD PACE- approved provider jointly offers a CDE activity with a non-approved provider, the PACE-approved provider assumes responsibility for the planning, organizing, administering, publicizing, presenting, and keeping records for the planned continuing dental education activity. Administrative responsibility for development, distribution, and/or presentation of continuing education activities must rest solely with the AGD PACE-approved provider. When two or more AGD PACE-approved providers act in cooperation to develop, distribute and/or present an activity, each must be equally and fully responsible for ensuring compliance with these standards. Letters of agreement between the joint or co-providers must be developed to outline each party's responsibilities for the CDE activity. Letters of agreement must be signed by all parties.

**LECTURE COURSE:** A live presentation intended to communicate information or teach people about a particular subject. Lectures are used to convey critical information, history, background, theories and equations and do not significantly involve audience participation with the exception of asking and answering questions.

**NEEDS ASSESSMENT:** The process of identifying the specific information or skills needed by program participants and/or interests of the program participants, based on input from participants themselves or from other relevant data sources. The specific needs thus identified provide the rationale and focus for the educational program.

**LECTURER/AUTHOR (also instructor, faculty, faculty member):** The person or persons responsible for the development and presentation of specific CDE course material for the intended audience.

**LIVE COURSE / ACTIVITY:** Continuing education courses that participants must attend (whether in person or virtually) in order to claim credit. Live courses can be offered in a variety of formats including national and local conferences, workshops, seminars, and live Internet-based conferences and teleconferences.

**OBJECTIVE:** Anticipated learner outcomes of a specific CDE learning experience or instructional unit, stated in behavioral or action-oriented terms for the participant.

**PARTICIPATION/HANDS-ON COURSE:** A presentation intended to teach a particular subject, technique or skill that actively involves the audience. Participants will actively manipulate dental materials and/or devices, treat patients, or practice clinical skills or techniques under the live or electronically-mediated supervision of a qualified instructor. When live patient treatment is involved, live instructor direct supervision is required. The participation activities must represent a minimum of 30% of total course time, and must directly address the educational objectives of the course and be an extension and amplification of the lecture portion of the course.

**PLANNED PROGRAM:** The total efforts of a sponsoring organization as they relate to CDE activities offered to professional audiences. A sequence or series of CDE activities, courses, or events that in total constitutes the sponsoring organizations' activities as they relate to CDE activities offered to professional audiences. These individual activities, courses, or events must be substantially distinguishable from one another. A planned program of CDE activities must consist of more than a single course offered multiple times. A single course offered multiple times may not exceed 50 percent of the total number of courses offered per year. The CDE provider's administrator must not function as a sole lecturer/author.

**PRODUCT TRAINING:** Courses where the central theme is focused on the use of a single product. Course content must be free from any sales and/or marketing information and should enhance a dental professional's knowledge and/or skill to deliver quality service to the public.

**PROGRAM PLANNING:** The total process of designing and developing CDE activities. This process includes assessing learning needs; selecting topics; defining educational objectives; selecting lecturer/author, facilities, and other educational resources; and developing evaluation mechanisms. All steps in the program planning process should be aimed at promoting a favorable climate for adult learning.

**PROTOCOL COURSE:** Courses which assign homework involving clinical activities and award CDE credit for these clinical activities successfully completed outside of the classroom. Participants must present assignment results to the course instructor or course director before CDE is awarded.

**PROVIDER:** An agency (institution or organization) that is responsible for organizing, administering, publicizing, presenting, and keeping records for the CDE program. The CDE provider assumes both the professional and fiscal liability for the conduct and quality of the program. If the CDE provider contracts or agrees with another organization or institution to provide facilities, faculty, or other support for the CDE activity, the recognized provider must ensure that the facilities, faculty, or support provided meet the standards and criteria for recognition. The CDE provider remains responsible for the overall educational quality of the CDE activity. (See SPONSOR)

**RECOGNITION:** Recognition is conferred upon CDE providers or sponsoring organizations that are judged to be conducting a CDE program in compliance with the Standards and Criteria for recognition. (The term "accreditation" is not used in the context of CDE, as "accreditation" has a precise educational meaning that implies that an on-site review based on curricular or patient service standards have been conducted by an accrediting agency recognized by the U.S. Department of Education or the Council on Postsecondary Accreditation. The review process used by AGD PACE does not meet these specific criteria.)

**RECOMMENDATIONS:** Detailed suggestions and/or assistance in interpreting and implementing the Standards and Criteria for recognition. (See STANDARDS AND CRITERIA FOR RECOGNITION)

**RELEVANT FINANCIAL RELATIONSHIPS:** For a person involved in the planning, administering or presentation of a continuing dental education activity, relevant financial relationships are financial relationships in any amount, occurring in the last 12 months, that are relevant to the content of the CDE activity and that may create a conflict of interest. AGD PACE considers relevant financial relationships of the person involved in the CDE activity to include financial relationships of a family member. Relevant financial relationships must be disclosed to participants in CDE activities. (See CONFLICT OF INTEREST and FINANCIAL RELATIONSHIPS),

**SELF-INSTRUCTIONAL COURSE / ACTIVITY:** Continuing education courses in printed or recorded format, including audio, video, or online recordings that may be used over time at various locations.

**SOUND SCIENTIFIC BASIS** CDE material should have peer-reviewed content supported by generally accepted scientific principles or methods that can be substantiated or supported with peer-reviewed scientific literature that is relevant and current; or the CDE subject material is currently part of the curriculum of an accredited U.S. or Canadian dental education program and, whenever possible, employ components of evidence-based dentistry.

**SPONSOR:** Another term used to designate the agency (institution or organization) that is responsible for organizing, administering, publicizing, presenting, and keeping records for the CDE program. (See PROVIDER)

**STANDARDS AND CRITERIA FOR RECOGNITION:** The criteria which applicant CDE providers will be expected to meet in order to attain and then retain recognition status. (See RECOMMENDATIONS) The verbs used in the Standards and Criteria for recognition (i.e., must, should, could, may) were selected carefully and indicate the relative weight attached to each statement. Definitions of the words that were utilized in preparing the standards are:

1. Must — expresses an imperative need, duty, or requirement; an essential or indispensable item; mandatory.
2. Should — expresses the recommended manner to meet the standard; highly recommended, but not mandatory.
3. May or could — expresses freedom or liberty to follow an idea or suggestion.

**UNRESTRICTED SUPPORT:** Financial or in-kind contributions to an organization and the use of the contributions is not restricted by the donor(s).

**VERIFICATION CODE:** Also referred to as Course Completion Code. Random code announced by program provider toward the end of each course to help verify that each participant has taken part in the entire course.