Participation and Credit Tracking Guidelines for Partnered Activities

In order for an activity to be compliant, records must reflect who attended the activity and the amount and type(s) of credit claimed. Because this information is essential, OCPD has developed templates and processes that must be used to document and provide this information. OCPD will provide you with the template and instructions, including the submission deadlines.

Participation Tracking

Participation data reflects the information of all of those who attended the activity and must include the following information:

- First Name
- Last Name
- Email Address
- Professional Designation (MD, DO, RN, etc.)

If you opt for OCPD to provide registration services, OCPD will capture this required information and provide you with a final registration list that you will use onsite at your activity. You will be responsible for updating this list to reflect onsite registrations, no shows, etc. and returning it to OCPD after the activity.

If you opt to manage registration on your own, OCPD will review your registration process to ensure all required information is collected and you will be responsible for submitting this participation data using OCPD’s template that will be provided to you by your Education Consultant.

Credit Tracking

Credit tracker data reflects information provided by each individual learner about the type(s) of credit they are requesting and the amount of time they attended the activity. OCPD will issue Statements of Participation to those individuals who submit the credit tracker. The following information must be included in the credit tracker data:

- First Name
- Last Name
- Email Address
- Professional Designation (MD, DO, RN, etc.)
- Type of credit requested (AMA PRA Category 1 Credits™, ANCC contact hours, etc. – varies based on credit types offered)
- Amount of credit claimed

There are three options available for Credit Tracking:

1. OCPD’s Online Credit Tracker – OCPD will create an online form to collect this required information. As part of this service, OCPD will email the registrants a link to the Online Credit Tracker the day of the activity, send one reminder email and provide a URL that you can include in your onsite materials so learners can submit their information.
2. You can create and manage your own online form to collect the required credit tracker data. OCPD will review your online form and approve it. You will use a template from OCPD to provide the required credit tracker data to OCPD.

3. You can use a paper worksheet to collect the required information for credit tracking. OCPD will review your paper form and approve it. You will use a template from OCPD to provide the required credit tracker data to OCPD.