

ANNUAL REPORTING WEBINAR





ANNUAL REPORTING IN PARS/JA-PARS

TOPICS

- 5 Steps for Annual Reporting
- Tips
- Excel Template to Update Learners and Close Activities
- Demo



ANNUAL REPORTING IN PARS/JA-PARS

What you need to do – 5 steps by 3/31/23

1. Accept the terms for the ACCME annual agreement, located on the dashboard in PARS under Agreement Page. Each year, all accredited providers are asked to accept the annual agreement regarding data submission and compliance with ACCME policies and procedures.

The screenshot shows the ACCME PARS/JA-PARS dashboard. At the top right, there are links for "Back to Accreditation Management" and the user name "Marcie Bonilla". The main navigation bar includes the ACCME logo and the text "Accreditation Council for Continuing Medical Education", along with menu items for "Dashboard", "Activities", "Learners", and "Reports". Below the navigation, the user is greeted with "Hello, Marcie" and their organization information: "AAA Test Organization | Organization ID: 1234567". A notification banner indicates "2 notifications require your attention". A list of items is shown, with "Agreement Page" highlighted and marked with a green circle containing the number "1".



ANNUAL REPORTING IN PARS/JA-PARS

What you need to do – 5 steps by 3/31/23

2. Enter and close all activities that ended in 2022. For non-enduring material activity formats, providers are encouraged to enter activities that started in 2022 and are remaining active into 2023.

The screenshot shows the ACCME dashboard interface. At the top right, there is a blue header with the text "Back to Accreditation Management" and "Marcie Bonilla" with a dropdown arrow. Below this is a navigation bar with the ACCME logo and the text "Accreditation Council for Continuing Medical Education". The navigation tabs are "Dashboard", "Activities" (highlighted with a green circle containing the number 2), "Learners", and "Reports". Below the navigation bar, the main content area displays "Hello, Marcie" and "AAA Test Organization | Organization ID: 1234567". There are two links: "Program Summary" and "Agreement Page". On the right side of the main content area, there is a red notification box with a white arrow icon and the text "2 notifications require your attention".

ANNUAL REPORTING IN PARS/JA-PARS

Which activities need to be closed?

- Activities are no longer closed automatically.
- All activities that ended in 2022 should be entered and closed.
- Enduring materials are the only format that does not need to be entered new every 12 months.
- Activities that span calendar years (i.e., RSS on academic year) do not need to be closed for 2022 and a new one entered for 2023. As long as they are entered for no longer than 12 months, you can just close them when they end.



ANNUAL REPORTING IN PARS/JA-PARS

What you need to do – 5 steps by 3/31/23

3. Enter all enduring material activities that occurred in 2022, if you haven't already. For those that are continuing into the next year, update the cumulative total learner counts as of December 31, 2022. Enduring materials should remain open until the end date, which may be up to 3 years from the start date. Once you have entered the enduring material, you will only need to update learner counts each year thereafter, until the activity closes.

You no longer need to enter enduring material activities for each year they are provided. Once you have entered the enduring material once, you will only need to update learner counts each year thereafter, keeping the activity open until the end date arrives.



ANNUAL REPORTING IN PARS/JA-PARS

What you need to do – 5 steps by 3/31/23

4. Complete and submit your Program Summary, located on the dashboard in PARS.

The screenshot shows the ACCME dashboard interface. At the top right, there are links for "Back to Accreditation Management" and the user name "Marcie Bonilla". Below this is a navigation bar with the ACCME logo and the text "Accreditation Council for Continuing Medical Education". The navigation tabs are "Dashboard", "Activities", "Learners", and "Reports". The "Dashboard" tab is active. Below the navigation bar, the user is greeted with "Hello, Marcie" and their organization information: "AAA Test Organization | Organization ID: 1234567". A notification banner at the top right states "2 notifications require your attention". In the main content area, the "Program Summary" link is highlighted with a green circle containing the number "4", indicating it is the current step in the process. Below it is the "Agreement Page" link.



ANNUAL REPORTING IN PARS/JA-PARS

What you need to do – 5 steps by 3/31/23

5. Review and update your contact information. You can do this by clicking Back to Accreditation Management in the top right section of the PARS dashboard.

The screenshot shows the ACCME PARS dashboard interface. At the top, a blue navigation bar contains a yellow circle with the number '5' and the text 'Back to Accreditation Management', followed by the user name 'Marcie Bonilla' and a dropdown arrow. Below this is a white header section with the ACCME logo on the left and navigation links for 'Dashboard', 'Activities', 'Learners', and 'Reports'. The 'Dashboard' link is underlined. The main content area is light blue and displays 'Hello, Marcie' and 'AAA Test Organization | Organization ID: 1234567'. Below this are links for 'Program Summary' and 'Agreement Page'. On the right side of the main content area, there is a red notification banner with a white play button icon and the text '2 notifications require your attention'.



ANNUAL REPORTING IN PARS/JA-PARS

Enduring Materials – Historical Data Entry

- Enduring materials used to have to be entered in each reporting year they were offered, which meant you had multiple versions of the same activity in PARS/JA-PARS. Sometimes providers entered a start date based on the reporting year, and not the true start date of the activity.
- In “old” PARS/JA-PARS, your activity summary view was only for what was entered in one reporting year. Now you see all activities previously entered on one screen.
- Seeing multiple versions doesn’t mean they are duplicates.
- When the new system was launched, ACCME added end dates to activities that didn’t have one. For EMs, we generally set the end date to be 3 years from the start date. If the end date we entered for your closed activities is not correct, it does not need to be updated.



ANNUAL REPORTING IN PARS/JA-PARS

Enduring Materials – Current Data Entry

- Enduring materials should be entered with their true start and end dates, with a duration of up to three years.
- For annual reporting, you should update the learner count through at least 12/31 until it ends, and then you input final counts and close the activity.
- If your LMS automatically updates the learner counts throughout the year, that's fine.
- If an enduring material is reviewed and renewed for another “term” you should enter it as a new activity with new start and end dates, with a duration of up to three years.



ANNUAL REPORTING IN PARS/JA-PARS

How can you tell what's missing?

- Review your internal list of activities that ended in 2022 and make sure all have been entered in PARS/JA-PARS.
- Search for draft activities and enter any missing information so that you can close them. Look for red text to show you what's missing to get out of draft status.
- Review your ready to close activities to make sure information is up-to-date and complete, including adding/updating final learner counts. Look for red text to show you what's missing in order to close.
- ACCME generally does not re-open activities that were closed during the annual reporting period for 2021 and earlier. We can assist with re-opening 2022 activities that require edits. Email us at info@accme.org.



ANNUAL REPORTING IN PARS/JA-PARS

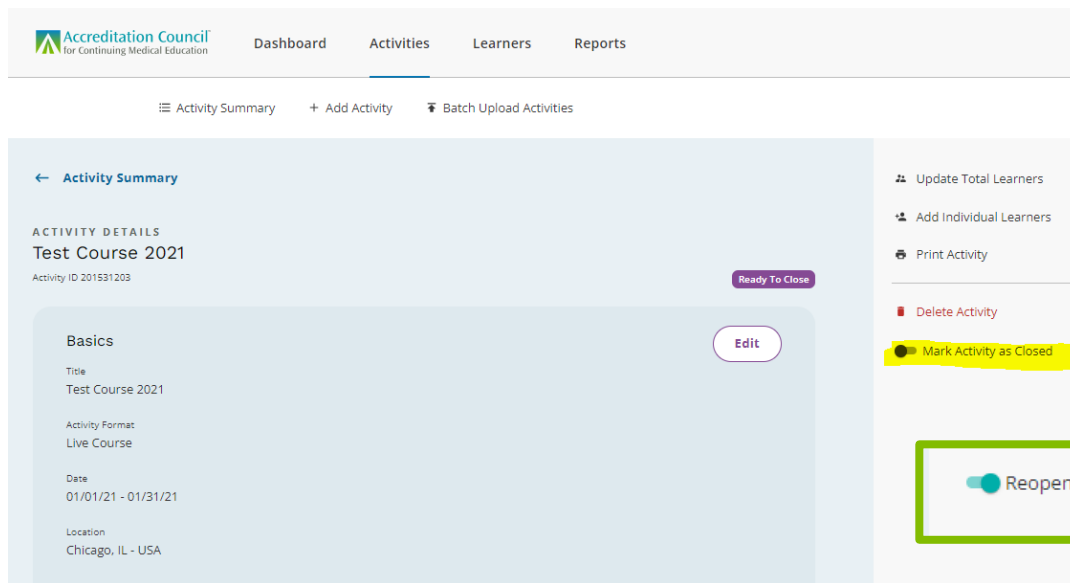
Options for closing activities

- Individually close your activities manually
- Bulk close your activities manually
- Use the Excel activity batch file to upload and/or update and close your activities
- Use the abbreviated Excel batch file to just update learner counts and/or close your activities

ANNUAL REPORTING IN PARS/JA-PARS

Closing Activities – Individual Option

- From activity summary, click on the title of the activity
- Review the detail page for any red text indicating information is missing
- If there is no missing data, you should have a Mark Activity as Closed slide
- Click on that to close your activity
- Can re-open within 30 days of closing



Accreditation Council
for Continuing Medical Education

Dashboard Activities Learners Reports

Activity Summary + Add Activity Batch Upload Activities

← Activity Summary

ACTIVITY DETAILS
Test Course 2021
Activity ID 201531203

Ready To Close

Basics Edit

Title
Test Course 2021

Activity Format
Live Course

Date
01/01/21 - 01/31/21

Location
Chicago, IL - USA

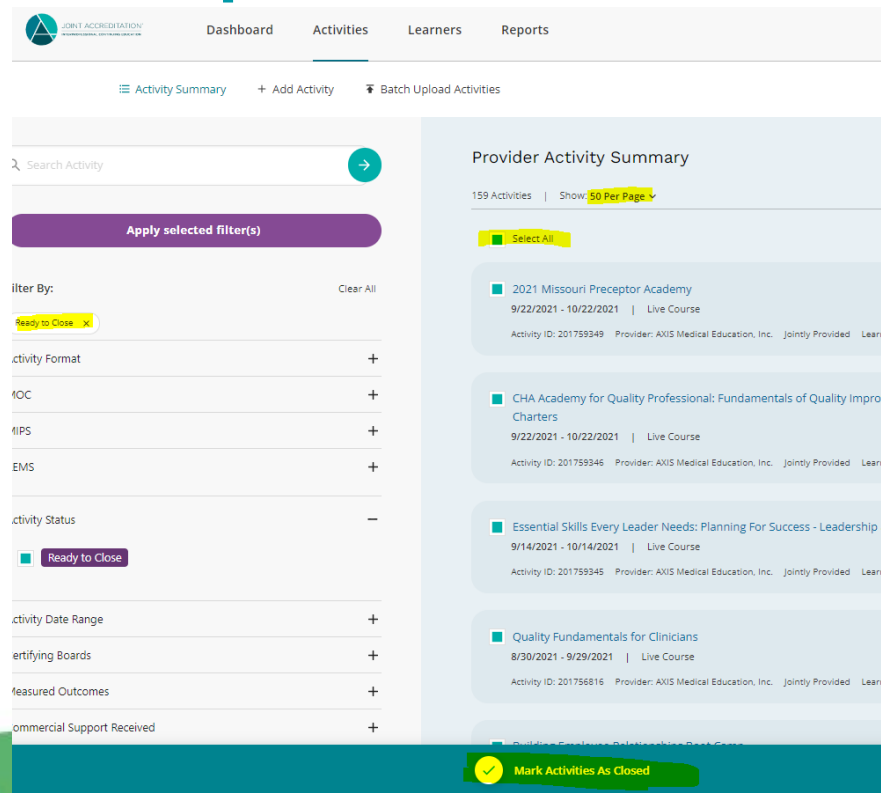
Update Total Learners
Add Individual Learners
Print Activity
Delete Activity
Mark Activity as Closed

Reopen

ANNUAL REPORTING IN PARS/JA-PARS

Closing Activities – Bulk Option

- Go to your activity summary, filter on activities with a status of ready to close.
- Change the selection to show 50 per page.
- Check the select all box.
- You should now get a banner popping up at the bottom of your page to Mark Activities As Closed.
- Click on Mark Activities As Closed
 - If all your activities have all required data, you will get a pop up asking you to confirm you want to close the activities. Click on the Yes, Close button.
 - If the system found activities that have data missing, you will get a message with the activity IDs of those activities that can't be closed.



The screenshot shows the ACCME PARS/JA-PARS interface. At the top, there are navigation tabs: Dashboard, Activities (selected), Learners, and Reports. Below the navigation, there are options for 'Activity Summary', '+ Add Activity', and 'Batch Upload Activities'. A search bar is present with a search icon and a right arrow. Below the search bar, there is a purple button labeled 'Apply selected filter(s)'. The 'Filter By:' section shows 'Ready to Close' selected. The 'Activity Format' section has a '+' sign. The 'IOC' section has a '+' sign. The 'MPS' section has a '+' sign. The 'EMS' section has a '+' sign. The 'Activity Status' section has a '-' sign and a 'Ready to Close' button. The 'Activity Date Range' section has a '+' sign. The 'Certifying Boards' section has a '+' sign. The 'Measured Outcomes' section has a '+' sign. The 'Commercial Support Received' section has a '+' sign. On the right side, there is a 'Provider Activity Summary' section with '159 Activities' and 'Show: 50 Per Page'. Below this, there is a 'Select All' button. The list of activities includes:

- 2021 Missouri Preceptor Academy (9/22/2021 - 10/22/2021) | Live Course
- CHA Academy for Quality Professional: Fundamentals of Quality Improvement Charters (9/22/2021 - 10/22/2021) | Live Course
- Essential Skills Every Leader Needs: Planning For Success - Leadership (9/14/2021 - 10/14/2021) | Live Course
- Quality Fundamentals for Clinicians (8/30/2021 - 9/29/2021) | Live Course

 At the bottom right, there is a green banner with a checkmark icon and the text 'Mark Activities As Closed'.



ANNUAL REPORTING IN PARS/JA-PARS

Add/Update and Close with Excel Batch

	Leave this column blank when adding a new activity				Complete these only for Live Course or Regularly Scheduled Series activities	Complete these only for Enduring Material activities										
Record Action	ACCME Activity ID	Internal ID	Activity Title	Activity Format	Delivery Method - In-Person	Delivery Method - Livestreamed	Delivery Method - Online	Delivery Method - Print/Other	Activity Start Date	Activity End Date	Location - Country	Location - City	Location - State	Location - Zip Code (optional)	AMA PRA Category 1™ Credits	
Add		Example1-1	Diabetes Management Strategies	Enduring Material			Yes	No	1/1/2021	12/31/2023					2	
Update	20112334	Ex2-1	Grand Rounds	Regularly Schedule	Yes	Yes			1/17/2021	12/17/2021	USA	Naperville	IL		24	

																If entering more than one name, separate with a semi-colon (;)
Include on CME Finder?	Activity Description	Activity URL	Who Can Register?	Fees for Learners?	Providership	Joint Provider Name	Measured Outcomes - Learner Competence	Learner Competence Measurement - Objective								
Yes	This is an example activity entry. The goals are to improve diabetes management strategies for healthcare professionals.	http://www.notarealurl.n	Open to all	Variable	Joint	Hospital ABC; Soci	Yes	Yes								
No	Grand rounds for staff physicians and residents. Topics vary throughout the year.	https://fakeurl.intranet.o	Limited	No, it's free	Direct		No	No								



ANNUAL REPORTING IN PARS/JA-PARS

Add/Update and Close with Excel Batch

Repeat these three columns as a group for each source of commercial support			Repeat these 7 columns for each certifying board for which an activity will be registered. For a list of accepted credit types and practice/specialty areas for each board see the reference sheet in this file. Separate multiple practice or specialty areas with a semi-colon.								
Commercial Support Type	Commercial Support Source	Amount Received	Register for MOC?	MOC Credit Deadline Date	Certifying Board	MOC Credits/Points	MOC Credit Type	Additional MOC Credit Type	Additional MOC Credit Type	Additional MOC Credit Type	Practice or Specialty Area(s)
Monetary	Abbott (Any division)	25000	No								
			Yes	3/31/2022	ABPath	20	Lifelong Learning	Lifelong Learning			Endocrinology; Oncol

Pharmacy audience - Pharmacists	Pharmacy audience - Pharmacy Technicians	Pharmacy sequence number	Pharmacy activity type	Pharmacy Topic Designator	Pharmacy Live Date	Is Pharmacy Certificate Program?
Yes	No		Knowledge	04 - General Pharm	1/18/2021;2/18/20 No	

Total Learners - Physicians	Total Learners - Other Learners	Close Activity?
5	10	Yes

In order to close an activity, an activity information must be entered, and the end date must be in the past. Once an activity is closed, it cannot be edited.



ANNUAL REPORTING IN PARS/JA-PARS

Abbreviated Excel Batch

- New record action called “Total Learners/Close”
- Can ONLY be used to enter/update learners counts and/or close activities that have already been entered into PARS/JA-PARS.
- Requires the ACCME activity ID.
- System will ignore any data in cells other than:
 - Record action
 - ACCME activity ID
 - Learner count fields
 - Close activity field



ANNUAL REPORTING IN PARS/JA-PARS

Abbreviated Excel Batch

- Choose “Total Learners/Close” as the record action
- Enter the ACCME Activity ID
- Enter final learner counts (JA has more learner columns)
 - For PARS, both physician and other columns must have a number (0 is okay)
 - For JA-PARS, at least one learner category must have a number (0 is okay)
- Select Yes in the last column to close activity
- All information must have previously been entered other than learner counts
- End date must be in the past

Record Action	ACCME Activity ID	Total Learners - Dentists	Total Learners - Allied Dental Staff	Total Learners - Registered Dietitians	Total Learners - Dietetic Technicians, Nurses	Total Learners - Optometrists	Total Learners - Pharmacists	Total Learners - Pharmacy Technicians	Total Learners - Physicians	Total Learners - Physician Assistants	Total Learners - Psychologists	Total Learners - Social Workers	Total Learners - Athletic Trainers	Total Learners - Other	Close Activity?
Total Learners/Close	201759725	5	7	0	0	0	0	0	0	0	0	0	0	0	0 Yes
Total Learners/Close	201759726	0	0	25	0	687	0	0	0	0	0	0	0	0	0 Yes
Total Learners/Close	201759727	0	0	0	0	0	0	687	264	361	127	0	0	0	0 Yes

Questions?



ANNUAL REPORTING IN PARS/JA-PARS

Demo

Agreement

Filtering to find draft, ready to close, learners not reported

Manually close individually

Manually close in bulk

Program Summary

Back to Accreditation Management



ANNUAL REPORTING IN PARS/JA-PARS

Resources

- **Annual Reporting Checklist:** <https://accme.org/publications/year-end-reporting-pars-checklist-and-resources>
- **PARS webpage:** <https://accme.org/new-pars>
- **JA-PARS webpage:** <https://www.jointaccreditation.org/ja-pars>
- **Training videos:** <https://vimeo.com/channels/1745075/videos>
- **PARS Activity Statuses:** <https://accme.org/publications/new-pars-activity-statuses-overview-and-definitions>
- **JA-PARS Activity Statuses:** <https://jointaccreditation.org/new-ja-pars-activity-statuses-overview-and-definitions>

QUESTIONS?

Contact info@accme.org

