

ASHA Third-Party Planner Manual

Policy, Procedures, and Requirements

Version: June 2025

1. Overview and Purpose

All ASHA CE events planned in cooperation with PSHA must be developed **under the guidance of the Association's ASHA CE Consultant**.

Before planning, **review this entire document** to ensure compliance with all requirements.

Cooperative course offerings are defined by ASHA:

<https://www.asha.org/ce/for-providers/admin/tutorial/6/#fee>

[Please review Standards for ASHA Continuing Education](#)

Timeline:

The typical timeline from beginning to completion of a project is 90 days

All required materials must be submitted by PSHA to ASHA **30 days prior to the event start date** to allow adequate review and approval.

Therefore, interested partners should reach out to PSHA at least 90 days prior to the event for an initial meeting, submit all required materials to PSHA by 45 days prior to the event so approval can be gained by ASHA within the 30 days.

2. Getting Started

Initial Contact

Email **ceadministrator@psha.org** to receive:

- Event submission instructions
- CE Consultant contact information
- Course Policy Template (includes deadlines)

Action: Sign and return the Course Policy Template to begin event planning.

Deadline: 90 days prior to the event.

3. Planning Checklist

Prepare the following materials:

Administrative and Financial

- **Complete application and secure deposits/payments (due 60 days prior to event)**

- **Submit Needs Assessment.** ASHA Standard 2.1 Identifies means of obtaining learning needs of the target population.
 - The expressed needs of the target audience.
 - The needs of patients/clients, communities, or populations.
 - Available data and information about gaps in the knowledge base, competencies, or performance of audiologists, speech-language pathologists, and/or speech, language, and hearing scientists.
 - New, revised, or updated legislation or regulations.
 - New research or practice guidelines.
 - New developments in products or practices.

Prepare a statement explaining how it was determined this CE Event was needed. For example: "After surveying our members, it was determined a session on this topic would be beneficial to all those within the profession."

- **Prepare all required policy documents**

Policies must be published and accessible to attendees, presenters, and PSHA CE staff:

- Accessibility/Accommodation Policy

Registration shall include options to indicate accessibility needs such as hearing impaired, visually impaired, wheelchair and other. Fonts, layout, colors, etc. will be considered for ease of reading. Provide a link or actual Accessibility Policy/Statement.

Example: The Association is committed to providing an outstanding experience for all participants at its events. We strive for full access to the activities of these events and accommodations relating to mobility, hearing, vision, or other areas may be provided. We ask that requests for reasonable accommodations at the event be made as early as possible, and well in advance of the event, so we may explore options to best meet the individual's need or provide a resource/suggestion to help meet the individual's requirement. Potential Barriers: Although we strive to make this event as accessible as possible to all members, some barriers may remain due to financial, logistical, facility, vendor or volunteer/staffing limitations. If the association is unable to provide an accommodation due to one or more of the reasons stated above and the individual feels attendance is no longer an option, the Association will provide a full refund of the event registration fee.

- Complaint Policy

Develop a statement for how to deal with complaints from attendees: **Example:** Questions and concerns should be emailed to ceadministrator@psa.org. Complaints arising during or after an event, can indicated in the program evaluation and emailed to ceadministrator@psa.org

- Professional Conduct and Non-Discrimination Policy

Printed promotional materials shall include a statement directing the participant to view the official statement/policy on the website. Presenters must view and acknowledge your Policy.

Example:

Policy:

All individuals involved in PSHA CE activities—including planners, instructors, and committee members—are expected to uphold the highest standards of professional conduct, respect the rights and dignity of all individuals, and actively promote diversity, equity, and inclusion (DEI).

Expectations include:

- Inclusive course content that reflects diverse populations and experiences
- Use of non-discriminatory, person-first language
- Respect for diverse identities, perspectives, and access needs
- Acknowledgment of systemic barriers in communication sciences and disorders.
- Adherence to the ASHA Code of Ethics and the PSHA Code of Conduct

- Refund/Cancellation Policy

The policy for each particular event shall be clearly stated on all printed promotional items and/or within online registration forms. Determine the deadline for cancellations, how refunds will be handled, and how to cancel.

Example: Cancellations accepted until October 6, 2025. A 10% processing fee will be deducted from registration fees paid.

- Data Security Policy

All personal/payment information should be stored/secured appropriately.

Example: PSHA is committed to protecting the privacy and security of all individuals associated with its continuing education activities, including learners, instructors, and planners. All personal and identifying information collected in the course of CE programming shall be handled in compliance with applicable federal and state privacy laws, including the Family Educational Rights and Privacy Act (FERPA) and Health Insurance Portability and Accountability Act (HIPAA), where applicable.

- Privacy Policy

If sharing participant personal information is a feature for a specific event, participants must be given the opportunity to opt in/out.. When collecting the attendees ASHA number and personal information, attendees must be notified that by providing such information, they are authorizing the organization and/or a third party to report their hours earned and personal information to ASHA.

Example: **""By providing your ASHA number and personal information you are authorizing the organization and/or a third party to report your earned hours and other information to ASHA."**

Once the items above are prepared, submit them to the CE Administrator on the Cooperative Course Offering Application for final review and processing for continuing education credit.

4. Presenter and Session Requirements

Each presenter must provide:

- Session title, abstract, learner outcomes, and level of learning
- Biography
- Disclosure Form and Statement (financial, non-financial, and product)
- Acknowledgement of:
 1. Professional Conduct and Non-Discrimination Policy
 2. Content Validity Statement
 3. Intellectual Property and Copyright Statement

PSHA has created a google form with all required elements needing to be obtained from the presenter. You may request the use of this form from the CE Administrator.

Example Acknowledgements

Professional Conduct and Non-Discrimination Policy:

I have read and agree to abide by PSHA's Professional Conduct and DEI Commitment

Content Validity:

Abstracts shall disclose the levels and types of evidence behind any clinical recommendations presented as well as risks and benefits of referenced treatment and techniques.

Intellectual Property and Copyright:

The organization respects the research and work developed by individuals. Presenters must honor intellectual property and copyrights for items in their presentation. Presenter attests that appropriate permissions have been obtained and all source materials properly cited.

5. Marketing and Promotional Requirements

Required Elements

All printed, web, and email materials must include:

- **PSHA/ASHA Brand Block** (image provided by PSHA)
- **Continuing Education Statement(s)** (listing DEI, Supervision, or Ethics hours if applicable)
- **Satisfactory Completion Statement**

- **For Webinars/Single Sessions:**

Example: Certificates will be awarded after full attendance, submission of a completed evaluation, and a learning assessment. No partial credit available.

- **For Conventions/Multi-Sessions:**

Example: Certificates will be awarded after full attendance and completion of required evaluations and assessments. Partial credit is available for this event.

- **Required Policies:**
 - Cancellation/Refund
 - Complaint
 - Accessibility/Accommodation
 - Conduct and Non-Discrimination
 - Privacy/Opt-In-Out options

Example: Vendors will receive attendee lists. Attendees must be provided the option to opt out of sharing personal information.

- **Presenter Disclosures** (linked or listed)
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7. Learning Assessment and Evaluation

Assessment of Learning

- Each session must include some assessment of learner knowledge. Acceptable methods of learning assessment include:
 - Completion of a project
 - Intent to change statement
 - Peer feedback
 - Performance/Equipment Demonstrations
 - Presentations
 - Quiz/Exam (does not have to be graded)
 - Report/Essay/Summary
 - Self Assessment/Reflection

Post-Event Evaluation

Create a survey (e.g., SurveyMonkey) to assess session content, presenter quality, facilities, and suggestions for future programs.

Program Improvement Example:

Post-event surveys will guide improvements in content, presenter selection, and logistics for subsequent events.

PSHA has a google form of our course evaluation which can be found [here](#)

8. Reporting and Certificates

Submit all materials to PSHA CE Consultant and Administrator for review.

Once registered with ASHA, PSHA will provide:

- Certificate of Completion template
 - Participant reporting document
 - Final checklist and balance due notice
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11. Fees

ASHA Fees (charged through PSHA)

- \$400 per event
- \$50 for subsequent offerings in consecutive months

PSHA Fees- Please choose your expected attendance. If your actual attendance exceeds the chosen attendance level, the balance will be due immediately following the event.

Participants	ASHA CEUs Only	ASHA + ACT 48
1–20	\$100	\$150
21–50	\$200	\$250
51–75	\$300	\$350
76–100	\$400	\$450
101–200	\$500	\$550
201+	\$600	\$650

12. Optional Services

Service	Description	Fee
Speaker Information Form	PSHA customizable Google form to collect presenter details	Free
PSHA Website Promotion	PSHA creates webpage + eblast to promote event	\$150
PSHA Virtual Classroom	PSHA manages assessments, evaluations, and certificates electronically	\$100
PSHA eblasts to members	Email of the flyer for your event will be emailed to all members	\$50

13. Course Registration and Review

- Courses registered for five years undergo routine and pre-renewal review.
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