Seminar Manual Submission Guidelines

The seminar manual is a complement to your professional presentation and a reflection of PESI. Abiding by the guidelines below will help to ensure your manual is completed accurately and in a timely manner. If you have any questions at any time, please email the manuals team at manuals@pesi.com.

Manual Components

Manual Content

The manual can include PowerPoint(s), text documents, forms, and any other handouts that you would like attendees to have. For continuing education credit application purposes, a draft of your manual is **due 10 weeks (70 days) prior to your first event**. The finalized version of your manual is due 4 weeks prior to your first event.

To ensure compliance with both PESI and continuing education board standards, all instructors are responsible for providing the following information in each presentation:

1. **Statement of Accuracy and Utility/Scope of Practice:** Please insert the following slide immediately following your title slide:

   "Materials that are included in this course may include interventions and modalities that are beyond the authorized scope of practice for your profession. As a licensed professional, you are responsible for reviewing the scope of practice, including activities that are defined in law as beyond the boundaries of practice in accordance with and in compliance with your profession's standards."

   The slide above is available as a downloadable .pptx file on www.pesi.com/speakerinfo under the Program Content Requirements section.

2. **Conflicts of Interest:** Please insert the following slide immediately after the "Scope of Practice" slide:

   "As required by several accrediting boards, speaker and activity planning committee conflicts of interest (including financial relationships with ineligible organizations) were disclosed prior to the start of this activity. To view disclosure information, please see activity advertising."

   The slide above is available as a downloadable .pptx file on www.pesi.com/speakerinfo under the Program Content Requirements section.

3. **Limitations of the Research and Potential Risks:** Please include 1-2 slides that clearly note the state of the literature related to the topic, limitations (where more research is needed, etc.), special considerations, and potential risks, including the most severe and most common risks. Please note that there is a question on our attendee evaluations as to whether this information was covered.

   Example limitations and risks statements:
   - While the literature suggests **XXX** is effective with the **XXX** population, there are limited studies among other **XXX** groups.

- **XXX**, et al suggests that **XXX** clients may not derive any benefit from the addition of **XXX** methods.
- The experience of **XXX** is probably mediated to a significant degree by culture, race, and other variables which are often not adequately represented in the literature.

4. **Content Warnings, if applicable:** If your video, demonstration, or exercise includes sensitive material that could be activating, please add a content warning slide. This allows attendees to prepare themselves and engage in the way that feels safest for them.

Please note: PESI presenters are expected to adhere to their respective profession's Code of Ethics as it relates to the use of confidential/protected client information (case studies, video/audio clips, etc.). This includes obtaining appropriate client consent as well as changing all identifying client information.

Please do NOT include your program's learning objectives in your slides or manual. Learning objectives may change, and we want to make sure that the slides do not have outdated learning objectives.

Additional limitations and risks information and the slide above are available for download on www.pesi.com/speakerinfo under the Program Content Requirements section.

Bibliography/Reference List Requirements:

- Number of references:
  - If your program is less than 3 hours, provide at least 3-5 citations/entries/references
  - If your program is 3 hours or longer, provide at least 1 reference per hour
- 50% or 5 entries (whichever is less), of which you are not the author, should be from peer-reviewed journals dated within the past 5 years
- There should be a clear link between the references and program content
  - If you are unable to provide peer-reviewed articles to directly support program content, provide references that tie the content back to generally accepted mental health principles, clinical reasoning, or earlier research.
    - Be sure to also address limited research in your discussion of Limitations and Risks.
- There should be references included from others beyond the originators or proponents of a particular theoretical position or technique
- Peer-reviewed, scientific journal articles should directly support program content, learning objectives, and marketing, including:
  - Theories
  - Assessment
  - Treatment
  - Interventions
  - Skills
  - Treatment outcome claims (ability to impact, affect, achieve, or guarantee treatment outcomes)
- If your program covers ethics, please include a reference to any Code of Ethics that are covered (Ex. ACA, NBCC, APA, AAMFT, NASW, ANCC etc.)
- If your program covers supervision for the behavioral health professions, please include a reference to the AAMFT Standards of Supervision, the APA Guidelines for Clinical Supervision, and any other guidelines or models of supervision that are covered
- Entries should be written in APA format (bibliographies not written in APA format will not be accepted by several accrediting bodies)

Post-Test Question Requirements:

All distance-learning and self-study programs will include a post-test and program evaluation. On the evaluation, learners will be asked to what extent the activity met each of the learning objectives, in addition to several other content, facility, and faculty-related questions.

The purpose of the post-test is to assess the extent to which the learner has achieved the learning objectives, so each post-test question should directly assess a learning objective. **Please submit your post-test questions 10 weeks (70 days) prior to your first event.** Post-test question templates can be found at www.pesi.com/speakerinfo.

Post-Test question requirements:

- Test questions should be written at a level appropriate to the post-graduate expertise of the participants
- Test questions should test participants' ability to *apply the content* covered in the program (e.g., case study questions) as well as recall of facts
- Test questions should allow learners to demonstrate their attainment of the learning objectives, and all learning objectives should be assessed by post-test questions
- 10 questions minimum for a one-hour program; 5 per hour after that. Add additional questions for partial hours as follows:
    - Over the hour by 6 minutes or less → no additional questions needed
    - Over the hour by 7-14 minutes → add 3 questions
    - Over the hour by 15+ minutes → add 5 questions (full hours' worth)
        - For example, a 6 hour and 15-minute program should have 40 multiple choice questions; a two-day (12.5 hour) program should have 70 multiple choice questions
        - Suggestion: Including a few extra questions is helpful in case your program runs longer than expected, and it may reduce the chance that we would need to reach back out to you for additional questions.
- Each question should have four (4) possible answer selections, one (1) of which is correct.
- Each question should contain all information necessary required to answer (e.g., if a case study question is being asked, please include the case information even if it was provided in an earlier question).
- The following answer selection types are NOT permissible and may not be used at all:
    - All/None of the above
    - All except…
    - Both…
    - X and Y
    - A, B, and D
    - True/False

Submission Timeline

Due with your final brochure content:
Bibliography/References: If you have not already submitted your bibliography with your brochure content, please submit it here: https://airtable.com/shrDzIuFMaJ887JwB. You may choose to revise the bibliography later, but we will use it to start the Continuing Education approval process.
Due 10 weeks prior to first event:
Post-Test Questions: Email attendee post-test questions, **along with the answers,** to manuals@pesi.com. These will be copy/pasted into our online testing system. A subset of test questions will be used for the in-person program (if applicable) and the full set will be used for webcast or home-study purposes.
Draft of your Seminar Manual PowerPoints, handouts, etc.: Send your draft of seminar materials, PowerPoint(s), text documents, etc., preferably by email (cepesi@pesi.com) or www.wetransfer.com.* Alternatively, an upload link can be sent upon request. Mail a hard copy only if it is not electronic. **Always include the original PowerPoint.**
Due 4 weeks prior to first event:
Seminar Manual PowerPoints, handouts, etc.: Send your finalized PowerPoint(s), text documents, etc., preferably by email (manuals@pesi.com) or www.wetransfer.com.* Alternatively, an upload link can be sent upon request. Mail a hard copy only if it is not electronic. **Always include the original PowerPoint.**

Submission Reminders

Deadlines: To ensure accurate and timely formatting of your manual, please honor all set deadlines for receipt of manual materials.

Finalizing Material: Please submit *only* **"manual-ready"** materials (i.e., correct all typos and ensure your materials are exactly how you want them to appear in the manual).

File Order: If you are submitting more than one (1) file, please provide us with the order in which you would like the files to appear within your manual.

Copyrighted Material: When determining fair use, courts will weigh a variety of factors. To abide by copyright laws and reduce infringement, we have provided guidelines and recommendations for your media usage. It is the responsibility of the speaker to determine whether materials are copyrighted or proprietary and to obtain written authorizations and permissions when applicable.

- No Disney or affiliate materials or clips (including images and screen shots)
- Make sure that the material you're using is educational in nature
- Always give proper credits/citations
- Expand on the material you're using to tie it back to the educational content of your program
- If you're unsure if the material falls under Fair Use, seek written permission from the copyright holder

Frequently used media types include:

- **YouTube** – Do not assume all material is available for anyone to use. If a video does not fall under fair use guidelines, take the appropriate steps to obtain permission for use.

- o Tip: Always read the details section below YouTube videos. Information regarding permission for use or copyright can often be found there.
- **Movies/TV Shows/Other Motion Pictures** - A small portion of the overall production - no more than 5% is our recommendation.
    - o For example: Using a three-minute clip from a two-hour motion picture is acceptable. Using a 15-minute clip from a two-hour motion picture is not.
- **Music** - Royalty free music can be used or any other music the speaker has received the permissions to play. Generally, music videos should not be used.
- **Pictures/Graphics/Images** - Images should only be used if necessary to clarify information (not for decorative purposes). When using images, the proper citations and/or permissions should be included.
- **Printed Material**- Copies of assessment tools, worksheets, research articles, or book passages should only be included in your attendee handouts if you have permission to copy and share them.

If you are questioning any media usage, please reach out to your business manager to discuss further. To learn more about fair use, click here: More Information on Fair Use | U.S. Copyright Office

Commercial bias and product promotion: Due to accrediting board rules, all continuing education activities must be free of commercial influence or bias. This means that books, program recordings and other products cannot be promoted during the continuing education activity and should be left out of program materials (i.e., your PowerPoint presentation).

Here are some examples of things to exclude from your PowerPoint and lecture:

- Advertisements & logos
- Brand names
    - o Medications should be referred to by their generic names
    - o Equipment/devices should be referred to by the device type, not by manufacturer or model name
- Images of pill boxes or bottles
- Links to purchase books, programs, resources, etc.
- Product or service promotion

Images used to convey or clarify information, such as charts, tables, diagrams, or visual representations, are encouraged and can be included in your PowerPoint presentation. Images such as cartoons, illustrations, and clip art should only be used if necessary to clarify information (not for decorative purposes) and when proper permission has been granted.

Document Formatting and Legibility Standards

Length: Keep the manual length to a level you can manage for a presentation. If you are using a PowerPoint, we recommend keeping the number of slides to 200 or less. *That being said, we prefer that you have more slides instead of crowding information on slides in an attempt to make it under a "limit."*

Legibility: If you are using PowerPoint, please do not use dark backgrounds or difficult-to-read fonts. For lengthy text, **do not crowd slides**; consider more slides with less text or submit a Word document for those sections. Please **do not** use a font size smaller than 24pts. Anything less may not be difficult for learners to read. If you are submitting hard copies or scanned images of any materials, make sure the materials are free of unnecessary marks/blemishes and are of good quality. While digital manuals may be in color, printed manuals requested by learners are printed in grayscale/black and white. We do NOT have a color printer available.

Page Breaks: Consider using page breaks in Word documents; this ensures that headings remain where they should, charts/tables aren't cut in half, etc. (In Word: Insert-Break, then select "Page Break" in the dialog box.)

Page Numbers: Please refrain from using page numbers. Our master page numbers will be added to the document at the time of pagination (unless you are submitting a fully print-ready manual).

Table of Contents: You may include a table of contents (TOC). However, you may need to renumber it to match the actual page numbers in the finished manual unless you are submitting a fully print-ready manual.

Please submit your materials and questions to:
The manuals team: manuals@pesi.com

*www.wetransfer.com is a free web service that allows you to send files up to 2 GB in size.