



Regularly Scheduled Series (RSS)

CME Training Manual

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CONTINUING MEDICAL EDUCATION DEFINED

What is Continuing Medical Education (CME)?

Continuing medical education (CME) consists of educational activities which serve to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a physician uses to provide services for patients, the public, or the profession. The content of CME is that body of knowledge and skills generally recognized and accepted by the profession as within the basic medical sciences, the discipline of clinical medicine, and the provision of health care to the public.

The Accreditation Council for Continuing Medical Education (ACCME) definition of CME is broad, to encompass continuing educational activities that assist physicians in carrying out their professional responsibilities more effectively and efficiently. Examples of topics that are included in the ACCME definition of CME content include:

- Management, for physicians responsible for managing a health care facility
- Educational methodology, for physicians teaching in a medical school
- Practice management, for physicians interested in providing better service to patients
- Coding and reimbursement in a medical practice

When physicians participate in continuing education activities that are not directly related to their professional work, these do not fall within the ACCME definition of CME content. Although they may be worthwhile for physicians, continuing education activities related to a physician's nonprofessional educational needs or interests, such as personal financial planning or appreciation of literature or music, are not considered CME content by the ACCME.



Source: Accreditation Council for Continuing Medical Education (ACCME)

What is a Regularly Scheduled Series?

A regularly scheduled series (RSS) is defined as a CME activity that is planned as a series with multiple sessions that occur on an ongoing basis (offered weekly, monthly, or quarterly) and are primarily planned and presented by Allgheny Health Network's professional staff.

Examples of activities that are planned and presented as RSS are grand rounds, tumor boards, case conferences, journal clubs, and M&M conferences.

Who's Who in CME?

The primary players in CME include the American Medical Association (AMA) and Accreditation Council for Continuing Medical Education (ACCME).

- **AMA – American Medical Association – <http://ama-assn.org>**

The AMA officially owns the Category 1 CME credit system. Providers of CME credit (i.e., AHN's Department of CME) must ensure all CME-certified activities comply with the Physician's Recognition and Award System as well as other CME-related AMA policies.

- **ACCME – Accreditation Council for Continuing Medical Education – <http://www.accme.org>**

The ACCME serves as the body accrediting institutions and organizations offering CME and identifies, develops, and promotes the standards for quality CME utilized by physicians in their maintenance of competence and incorporation of new knowledge to improve quality medical care for patients and their communities. Providers of CME credit (i.e., AHN's Department of CME) must ensure all CME-certified activities comply with the ACCME Accreditation Criteria, Standards for Commercial Support, and Policies.

- **Pennsylvania Board of Medicine** requires 100 CME credits every 2 years for physicians to maintain their medical license. The credits can be awarded in across 2 categories. Category 1 is known as AMA PRA Category 1 Credit, which is awarded by AHN CME. For more information visit <https://www.dos.pa.gov/ProfessionalLicensing/BoardsCommissions/Medicine/Pages/CME-Requirements.aspx>
- CME department staff will work with you to ensure your CME activity complies with all CME-related policies.



CME POLICIES AND PROCEDURES FOR RSS

AHN's Department of CME certifies more than 200 RSS meetings each year (over 5,000 individual RSS meeting sessions) in addition to approximately 30 live courses and internet enduring materials.

CME staff provides accreditation oversight and monitoring, interpretation and development of policies and procedures as well as staff resources to ensure continued compliance.

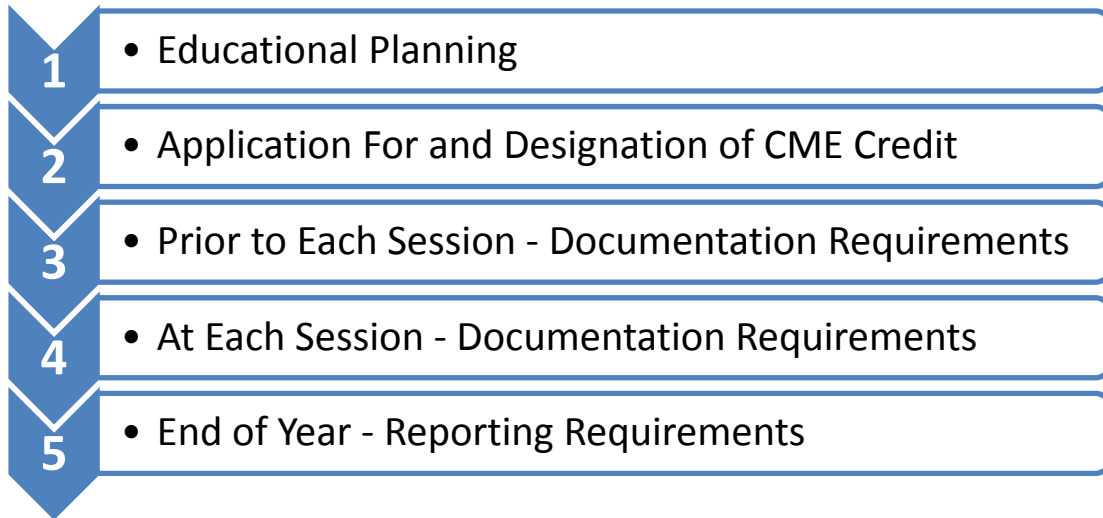
Each RSS meeting is required to:

- Address a demonstrated practice gap (clinical/professional problem), identify educational objectives and desired outcomes, and present unbiased educational content.
- Have a dedicated course director (physician) and department coordinator (administrator) to provide administrative support. The administrative support is required to prepare meeting documentation to ensure compliance with all CME policies and procedures.

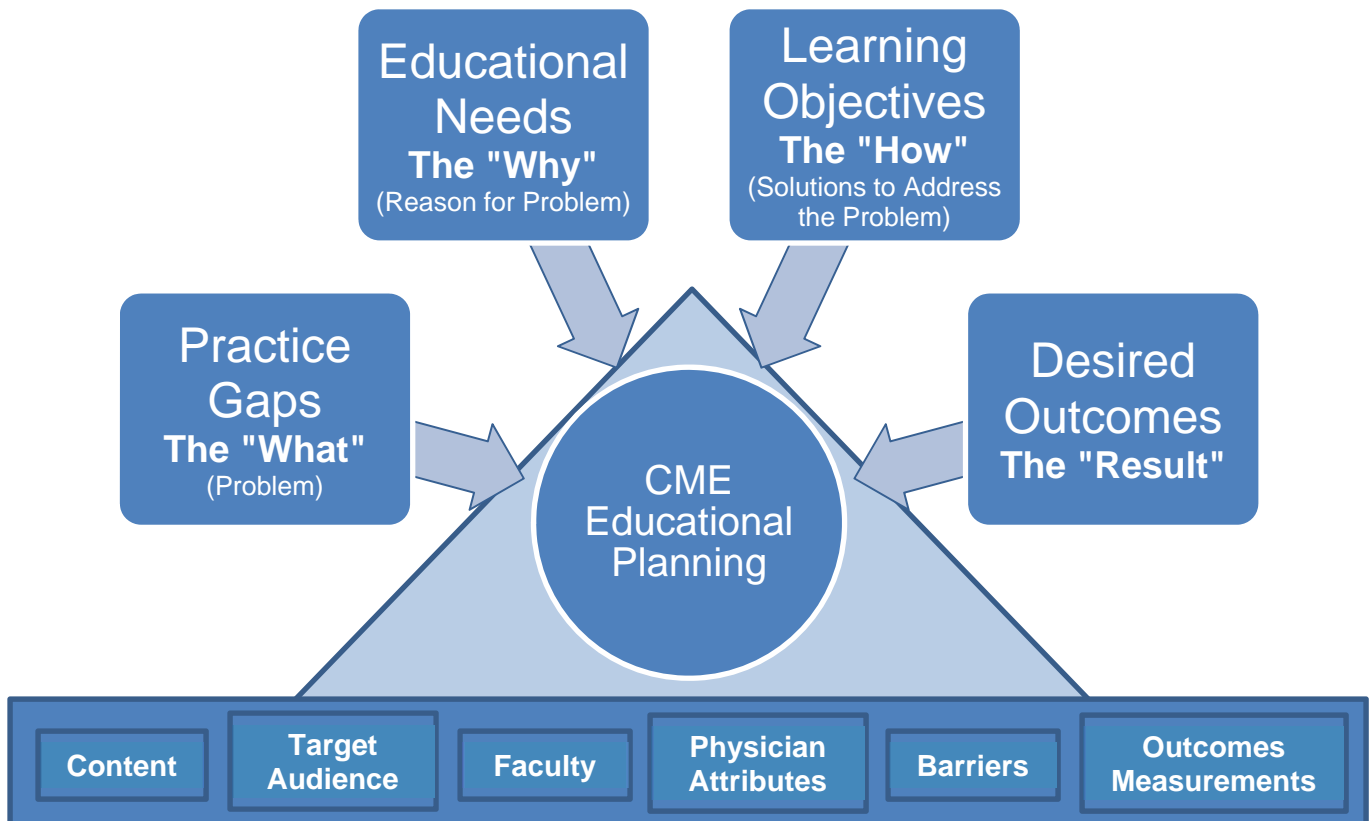
Who may serve as Course Directors? A physician faculty member employed by the Allegheny Health Network should be part of the planning team. Non physician faculty members may be considered for leadership positions based on compelling need; this requires prior approval by the Manager, Continuing Medical Education or the AHN CME Committee.

- Have a flyer prepared prior to each meeting that includes required CME information (a template will be provided).
 - Completed flyers must be distributed/displayed to all meeting participants prior to the start of each meeting (additional information provided in next section).

RSS PLANNING AND EXECUTION OVERVIEW



EDUCATIONAL PLANNING





CME activities must be designed to...

- Address educational needs defined by at least one (1) professional practice gap.
- Change provider competence (improve abilities/strategies), performance (modify practice), and/or patient outcomes.

The primary purpose for a CME meeting should be to improve the problems identified in practice (practice gaps) as well as foster the continuing professional development of physicians and other healthcare providers.

Identifying Practice Gaps – Helpful Questions

- Have any areas of improvement been identified by quality or departmental data, reports, committees, etc.?
- What are the key issues or obstacles to patient care you or your colleagues encounter?
- What kinds of clinical situations do you or your colleagues find difficult to manage or resolve?
- Why do these problems/challenges exist? What is contributing to them? How can this meeting help address and improve/eliminate these problems/challenges?

Additional information regarding the planning process can be found within the CME application.

APPLICATION FOR AND DESIGNATION OF CME CREDIT

An application is required for each regularly scheduled series, not each session. Once an application has been approved, the AHN Department of CME will advise you when the application content needs to be updated. Applications are accepted for new CME activities throughout the year. Submit your application at least four (4) weeks prior to the first date of your meeting.

An online CME application form must be completed before your activity can be considered for CME credit. In addition to the completed online application, the following materials must be completed and/or submitted to the CME department:

- A completed Conflict of Interest (COI) Disclosure form for each course director and planner identified on the application.
- Preliminary schedule or list of topics if a set schedule was not indicated on the application (i.e. weekly every Thursday, monthly every 1st Monday, etc.).

Allegheny General Hospital is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide *AMA PRA Category 1 Credits*[™].

An RSS must be officially approved before CME credits can be awarded to meetings. We cannot retroactively provide CME credits per the American Medical Association (owner of the CME credit system).

CONFLICT OF INTEREST (COI) DISCLOSURE

Who Needs to Disclose?

All persons in a position to influence or control content (medical student, resident, nurse, physician, staff, patient, etc.) must complete the COI disclosure form identifying any relevant financial relationships with commercial interests¹.

The COI disclosure form must be **completed prior to** the individual's involvement in planning or presenting content.

Anyone who refuses to complete the required disclosure form will not be allowed to present OR CME credits will not be provided to their presentation.

What is a Conflict of Interest?

A conflict of interest (COI) occurs when individuals (or their spouse/partner) in a position to control the content of CME have a relevant² financial relationship³ – of any financial amount – within the past 12 months with a commercial interest that produces, markets, re-sells, or distributes health care goods or services consumed by, or used on patients.

What if there is a COI?

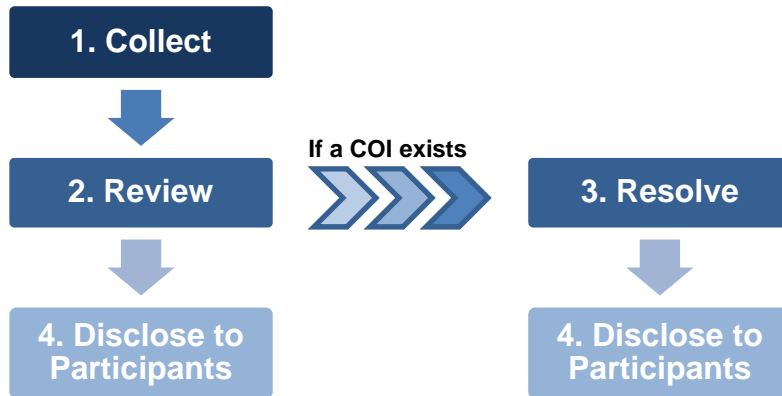
If the individual indicates they do have a COI (relevant financial relationships to disclose), contact the CME department immediately in order to resolve the relationships.

¹ [ACCME Definition of a Commercial Interest](#): any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients.

² **Relevant financial relationship**: A financial relationship with a commercial interest and the opportunity to affect the content of CME about the products and/or services of that commercial interest.

³ **Financial relationships**: those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria for promotional speakers' bureau, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. ACCME considers relationships of the person involved in the CME activity to include financial relationships of a spouse or partner. The ACCME has not set a minimum dollar amount for relationships to be significant. Inherent in any amount is the incentive to maintain or increase the value of the relationship.

Management of Conflicts of Interest



1. Disclosure forms are **REQUIRED** for anyone in a position to control the content of a CME activity.

- Disclosure forms must be completed by the **course director, co-director, and all planning committee members at the time of applying for CME credit**; applications for credit will not be approved until all disclosure forms are completed.
- **Presenters and moderators** must complete a disclosure form **prior to their involvement/presentation**.

2. Review of Disclosure Forms

- If the individual indicates they have no relevant financial relationships to disclose, then no further action is required; move on to step #4.
- If the individual indicates they do have relevant financial relationships to disclose, then proceed to step #3.

3. Review and Resolve Conflicts of Interest

- **When?** If the individual indicates they do have relevant financial relationships to disclose, then the conflict(s) must be reviewed and resolved by the CME department prior to their involvement/presentation.
- **How?** Resolution occurs by sending the CME department the individual's disclosure form and contact information. If a Grand Rounds Speaker has a conflict the CME office will need to review their presentation prior to the conference as well.

4. Communicate the Disclosures to Meeting Participants

- The results of all disclosures must be communicated to meeting participants in advance of each meeting they were involved with (*i.e.*, *John Smith, MD has indicated he serves on the speakers' bureau for Pfizer – OR – Presenter/John Smith, MD has no relevant financial relationships with commercial interests to disclose*).
- Common methods of communicating this information include posting a CME flyer or sending the information via email in advance of each meeting (see below for additional information).
- **NOTE: Before creating your meeting flyer, you must verify the disclosure has been completed and ensure the disclosure information on the meeting flyer matches the information on the disclosure form.**

CME Conflict of Interest forms are valid for 12 months. It is the individual's responsibility to complete a new form if there is a change in a relationship during this 12 month period.

Independence in CME

All CME-certified presentations must be free from commercial bias, therefore...

- Planners, speakers, and topics must be identified and selected by AHN faculty or staff member.
- Employees of commercial interests cannot suggest speakers or topics, provide a list of potential speakers or topics for the department to choose from, identify gaps or needs, etc.
- Employees of commercial interests cannot present content at CME-certified meetings if the content is related to their employers' business lines and/or products.

REQUIRED STEPS BEFORE EACH MEETING OF AN RSS SERIES

DISCLOSURE (ACCME Standard 2): All individuals in a position to control content (identification, selection of content/topics, presentation of content, etc.) are required to complete a CME conflict of interest disclosure prior to their involvement/presentation.



RESOLUTION OF CONFLICTS OF INTEREST (ACCME Standard 2): If an individual has identified a financial relationship on their CME disclosure, then disclosure form and their contact information must be submitted to the CME department at least 1 week prior to their presentation in order for CME to take appropriate steps to “resolve” the conflict of interest.



COMMUNICATION OF DISCLOSURES TO LEARNERS (ACCME Standard 6):

The results of all disclosures must be communicated to the audience in advance of each meeting they were involved with (*i.e., John Smith, MD has indicated he serves on the speakers' bureau for Pfizer – OR – Presenter/John Smith, MD has no relevant financial relationships with commercial interests to disclose*).

Common methods of communicating this information include posting a CME flyer or sending the information via email in advance of each meeting (see below for additional information).



COMMUNICATION OF IMPORTANT CME INFORMATION TO LEARNERS (ACCME Standard 6):

A CME flyer must be customized to include the meeting date, topic, speaker, and speaker disclosures. **This flyer must be distributed/ displayed to all meeting participants prior to the start of each meeting.** Note, the CME department will provide you with a flyer template for your use.

Methods of distribution:

- **Email to all meeting participants with the flyer attached – OR – contents of the flyer included in the email text**
- **Flyer posted in the room and visible as individuals enter the room**



Will your meeting receive any financial support in the form of an educational grant or promotional exhibit (i.e., display table)?

If yes, please read below.

If no, please skip to the next section.



EDUCATIONAL GRANTS ** must contact/notify the CME office BEFORE applying for education grants

If your meeting receives any financial support from a commercial interest...

- It must be documented through a **Letter of Agreement** that is **signed by the company and by the CME department BEFORE the meeting** occurs.
 - **NOTE: Only the Manager of CME is authorized to sign grant agreements on behalf of AHN.**
- Once the letter of agreement is fully executed (signed by the company and the Manager of CME), **the support must be acknowledged to meeting participants** (i.e., This CME activity is supported by an educational grant from ABC Pharmaceutical Company.).



PROMOTIONAL EXHIBITS (i.e., display tables)

If your meeting will allow commercial interests to purchase an exhibit/display table...

- An exhibit agreement must be signed and provided to CME in advance of the meeting.
- The company must be charged a fee for the exhibit table (if more than one company will be exhibiting, they must be charged the same fee for the same amount of exhibit space).
- Exhibits must be placed outside of the space where the education will be occurring (i.e., the exhibit cannot be located inside the same room where the presentation will be given).



Sample CME Flyer

Conference Name

Presentation Title
Speaker/Moderation Name

Conference Date
Time

Objectives (can be global)

Accreditation Statement: *DO NOT MODIFY THIS STATEMENT*

Allegheny General Hospital is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

Allegheny General Hospital designates this live activity for a maximum of 1.0 *AMA PRA Category 1 Credits™*. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Disclosure Statement: In accordance with the Accreditation Council for Continuing Medical Education (ACCME) and the policy of Allegheny General Hospital, presenters must disclose all relevant financial relationships, which in the context of their presentation(s), could be perceived as a real or apparent conflict of interest, (e.g., ownership of stock, honoraria or consulting fees). Any identifiable conflicts will be resolved prior to the activity. Any such relationships will be disclosed to the learner prior to the presentation(s).

John Smith, MD has indicated he serves on the speakers' bureau for Pfizer – OR – Presenter/John Smith, MD has no relevant financial relationships with commercial interests to disclose

****Claim CME Credit****

Text Attendance Code to (412) 301-9919

****here is where you may want to include whether an evaluation is required OR if they will receive credit automatically after texting****

REQUIRED STEPS **BEFORE** EACH MEETING OF AN RSS SERIES

The following documentation must be documented **BEFORE** each meeting:

1. **Meeting Notice:** Mechanism used to communicate the required CME information to meeting participants. Appropriate mechanisms include:
 - **CME FLYER:** a template is provided with the CME approval that is customized with the global learning objectives, accreditation statements, etc. for your meeting. If you choose this method, you are required to update the flyer for each meeting to include the meeting date, topic (if applicable), speaker name(s), and speaker disclosures. **The flyer must then be displayed to all meeting participants prior to the start of each meeting.** (NOTE: the flyer must be saved in your CME Shared folder or uploaded to the session in ethos).
 - **EMAIL:** another option is to send an email to all meeting participants with the flyer attached – OR – add the contents of the flyer into the email text (NOTE: the flyer still must be saved in your CME Shared folder or uploaded to the session in ethos).
2. **Educational Grant** – if your meeting will receive an educational grant, a grant letter of agreement must be signed by the Manager of CME AND the company providing the grant PRIOR to the meeting. (NOTE: you must acknowledge the grant support on the flyer).

REQUIRED STEPS **AFTER** EACH MEETING OF AN RSS SERIES

The following documentation must be submitted to CME AFTER each meeting, *if applicable...*

1. If grant support received: Submit final budget detailing how grant funds were actually spent.
2. If promotional exhibits were allowed: Submit a copy of exhibit check, final budget detailing how exhibit funds were actually spent, and copy of signed exhibitor agreement.

WHAT IS REQUIRED AT THE END OF THE APPROVAL PERIOD?

Regularly Scheduled Series are renewed on an annual basis. Information regarding documentation required to close-out the previous approval period as well as instructions for the renewal will be distributed to the identified course director and department administrative coordinator approximately 2 months prior to the end of the approval period.

CME REPORTS

Through our new CME Portal, EthosCE, all department coordinators now have access to the following reports:

- **Attendance by Session:** This report allows you to see how many people, and who specifically, have received CME credit for each session of your meeting. We encourage you to review these reports often and remind your participants to claim their CME credits!
- **Transcript Report** – view, download, print CME credit transcripts for your providers
- **Master Attendance Code Spreadsheet** –
Go to: <https://cme.ahn.org/admin/reports/course/sms-codes>
Sort By Series Name
Download CSV file

TOOLS AND RESOURCES

CME Website:

Visit <https://cme.ahn.org/content/rss-coordinator-resources#overlay-context=> for all available tools and resources.

CME Contacts:

- Ashley Knoch, CME Coordinator, 412-330-4068 or ashley.knoch@ahn.org
- Bernice Sulkowski, CME Coordinator, 412-330-2643 or bernice.sulkowski@ahn.org
- Rachel Phillips, Manager of CME, 412-585-4514 or rachel.phillips@ahn.org