REGULARLY SCHEDULED SERIES (RSS)
Annual Training for CME Associates

Office of Continuing Medical Education

Presented by Cindie Garcia-Garza

Summer 2010
OBJECTIVES

- Discuss roles/responsibilities of CME Associates and RSS Chairs/Committees
- Discuss UTHSCSA CME policies and procedures for Regularly Scheduled Series
- Describe process for submitting complete and compliant RSS CME Applications
- Provide assistance/guidance to RSS Chairs with completing the CME RSS Application
- Describe the process for obtaining approval for ethics and/or professional responsibility
- Contact CME Office for assistance
ACCREDITATION

The Office of CME is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

CME consists of educational activities to maintain, develop or increase:

- Knowledge
- Skills
- Professional Performance
- Relationships

that physicians use to provide services for patients, the public, or their profession
ACCME defines Regularly Scheduled Series as…

…*daily, weekly or monthly* CME activities that are *primarily planned by and presented to* the provider’s professional staff.
June 2 & 3 – RSS Annual CME Associate Training for:

- Grand Rounds
- Tumor Boards
- Journal Clubs
- Lecture Series
- M&M Conference
- Didactic Conferences/Lecture Series
- Case Conference
- Skills Demonstration
- Quality/Risk Management
CME RSS 2010-11 TIMELINE

**June**– 2010-2011 CME Applications e-mailed to all CME Associates/Departments. CME applications will also be available on CME website.

**August 2**-- CME completed applications and supporting documentation are **due** to the CME Office.

**September** – Approval letters are sent to Departments
COMPLETING THE RSS APPLICATION
WHO IS RESPONSIBLE?

- The RSS Chair is required to complete an annual application for AMA PRA Category 1 Credit™.

- The CME Office will provide the CME Associates with the 2010-2011 Regularly Scheduled Series application
  - Application materials emailed by June 2010.
  - Application materials will be available on the CME Website by June 2010
    - http://cme.uthscsa.edu/RSSForms
COMPLETING THE APPLICATION
(What you need to provide the CME Office)

• Source Documents that provide evidence that the series is planned based on real data

• Tentative Agenda/Schedule (quarterly)
  ◦ September, October, and November due by August 2, 2010

• Disclosure Forms for new faculty and planners only

• Attestation Form for new faculty and planners only
  ◦ Only if relationship with commercial interests are disclosed
  ◦ Commercial interests
    • Pharmaceutical Companies
    • Medical Device Companies
    • Any other company that is regulated by FDA
COMPLETING THE APPLICATION
(What you need to provide the CME Office)

• Sample Marketing Material
  ◦ If multiple methods are used include a sample for each method
  ◦ Materials must include Accreditation Statement and AMA PRA Category 1 Credit Designation Statement
  ◦ Should include financial disclosure for planner/speaker

• Sample Attendance Form
  ◦ Pre-printed Sign-in Sheet

• Sample Evaluation Tool
  ◦ Sample evaluation template provided by CME Office
  ◦ Your sample evaluation form is subject to feedback from CME Office
  ◦ CME Office provides innovative evaluation development services
    • Use needs assessment and learner-focused objectives
      provided by Series organizers
NEEDS ASSESSMENT
SUPPORTING DOCUMENTS

- A minimum of 2 supporting documents must be submitted with the application.
- Applications submitted without a minimum of 2 supporting documents will be considered incomplete, and may result in delayed approval.
# Needs Assessment Supporting Documents

## Data Sources

<table>
<thead>
<tr>
<th>Inferred Needs</th>
<th>Expressed Needs</th>
<th>Data Driven Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>- New diagnostic and treatment methods</td>
<td>- Requests from participants in your current series</td>
<td>- Epidemiological data</td>
</tr>
<tr>
<td>- The availability of new medications or new indications</td>
<td>- Results of formal surveys</td>
<td>- Evidence Base Guidelines</td>
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<tr>
<td>- New technology or new applications for existing technology</td>
<td>- Informal comments among colleagues</td>
<td>- QI/QA data</td>
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<td>- Expert opinion about advances in medical knowledge</td>
<td>- Consensus of physicians in a department</td>
<td>- QI Outcomes data</td>
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<td>- Acquisition of new equipment or facilities</td>
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<td>- Morbidity/Mortality data</td>
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<td>- Legislative, regulatory, organizational changes affecting patient care</td>
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<td>- Hospital statistical data e.g. infection control</td>
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<td>- Information from re-credentialing reviews</td>
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<td>- Procedural Statistics e.g. surgical</td>
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<td></td>
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<td>- External requirements e.g. professional society guidelines, licensure requirements</td>
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<td>- Evidence based peer-reviewed journal articles</td>
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</tbody>
</table>
NEEDS ASSESSMENT
SUPPORTING DOCUMENTS

• Examples of Data Sources (Inferred Needs)
  ◦ Documentation of new diagnostic and treatment methods
  ◦ Documentation of the availability of new medications or new indications for existing medications
  ◦ Documentation of new technology or new applications for existing technology
  ◦ Expert opinion about advances in medical knowledge
  ◦ Acquisition of new equipment or facilities
  ◦ Legislative, regulatory, organizational changes affecting patient care
NEEDS ASSESSMENT
SUPPORTING DOCUMENTS

• Examples of Data Sources (Expressed Needs)
  ◦ Requests from participants in your current series
    • Documented results of focus group discussions
    • Documented summary of responses from presentation evaluations
      • future topics
      • Challenging areas
  ◦ Documented Results (summary) of formal surveys
  ◦ Documented informal comments among colleagues
  ◦ Documented consensus of physicians
    • in a department
    • in a clinic
Based on the information that you heard today, what remains unclear to you?

- After Dr. Guerra’s presentation my only question is “what is it going to take to mobilize our community?” Wow!
- How do we make these needed reforms
- How healthcare information that is electronically stored will be protected against computer hackers
- How the government proposes to pay for healthcare reform and current global propositions being considered
- How the healthcare reform will impact mental health outcomes
- Unsure
- How to make a difference in healthcare reform
- Mankind
- Where we will be with technology in healthcare in the near future
- Healthcare issues overview did not touch on mental health care generally or in South Texas. How do we rate on that?
- Why I get unclear information about what workshop was to be about. I thought it was on ethics and healthcare.
- Bring awareness to patients and give information to work on solutions

How to improve the flow of information and education of primary providers as to the necessity and coordination of care.

Medical community commitment to patient care above profit concern remains a main factor

Still unclear at confidentiality/privacy issues of medical records
What other topics or speakers would you be interested in for future presentations/events?

- Near-death experience and afterward
- Discussion of pulling the plug on brain dead patients
- Medical/Religion/Spiritual related topic. Integrative medicine.
- Palliative care. Team building.
- Conflict of interest and health care providers
- Anything related to HIV care
- Mental health caregivers' role and central importance to palliative and end of life care. Understanding about the process of reincarnation.
- Information on grief and bereavement
- PTSD – what to know, latest research on what works, how work effectively and combat vets and others
- Leon Kass!!
- Spirituality's role in care
- Mental illness
- How to be a good change
- Lifetime fitness and working out, as suggested by Jack LaLane, the 95 year-old.
- Scope of healthcare needs and support services for today's military veterans and their families as conflicts continue
- Christina Puchalski
- Spirituality and religion in medical care
- MRSA
NEEDS ASSESSMENT
SUPPORTING DOCUMENTS

• Examples of Data Sources (**Data Driven Needs**)
  ◦ Epidemiological data
  ◦ Evidence Base Guidelines
  ◦ QI/QA data
  ◦ QI Outcomes data
  ◦ Morbidity / Mortality data
NEEDS ASSESSMENT
SUPPORTING DOCUMENTS

• Examples of Data Sources (Data Driven Needs)
  ◦ Hospital statistical data e.g. infection control
  ◦ Information from re-credentialing reviews
  ◦ Procedural statistics e.g. surgical
  ◦ External requirements e.g. professional society guidelines, licensure requirements
  ◦ Evidence based peer-reviewed journal articles
BIOGRAPHICAL DATA FORMS

• Speaker(s)
  ◦ Bios for UTHSCSA speakers are available in eCV (http://inside.uthscsa.edu/)
  ◦ Outside speakers (non-UTHSCSA) need to provide a bio data form to the CME Office

• Planner(s)
  ◦ Bios are not needed for planners.
    • The RSS Chair verifies that all individuals involved as planners for the series have the necessary qualifications and experience
*SPEAKERS & TOPICS*

• For the months of:
  ◦ September, October, November
    • Submit to CME Office by August 2, 2010
  ◦ December, January, February
    • Submit to CME Office by November 1, 2010
  ◦ March, April, May
    • Submit to CME Office by February 4, 2011
  ◦ June, July, August
    • Submit to CME Office by May 3, 2011

*Applies to grand rounds, lecture and didactic series*
FINANCIAL DISCLOSURE FORMS

- **Speaker(s)**
  - Outside speakers (non-UTHSCSA) need to provide a financial disclosure form
    - It is the responsibility of the RSS Chair to ensure that the speaker is identified
    - CME Associates maintain disclosure information and provide to the CME Office upon request
      - Call us if you have a question about disclosure
FINANCIAL DISCLOSURE

• As a sponsor accredited by the ACCME, the UT Health Science Center San Antonio School of Medicine must ensure that all CME activities are independent of the commercial interests control or influence.

• Relevant financial relationships for all planners and speakers participating in any UTHSCSA activity must be disclosed to the participants prior to their participation in the activity.

• Applies to speaker/planner or immediate family member
FINANCIAL DISCLOSURE

• Only upon request
• CME Office has a disclosure database
• CME Associates provide CME Office with list of names only
• CME Office will query its disclosure database
  ◦ If speaker/planner disclosure is found, CME Office will provide to CME Associate for verification with speaker or planner
  ◦ If not found, CME Office will inform the CME Associate that the disclosure form is required
SOME EXAMPLES OF RELEVANT FINANCIAL RELATIONSHIPS

Speaker/planner:

• On a speakers bureau of a **pharmaceutical company or medical device company**
• Owns of stock in a **pharmaceutical company or medical device company**
• Employed by a **pharmaceutical company or medical device company**
• Consults for a **pharmaceutical company or medical device company**
• Applies to speaker/planner or immediate family member
SOME EXAMPLES OF RELEVANT FINANCIAL RELATIONSHIPS

Speaker/planner:

- Member of Professional Society
- Faculty member of an academic institution
- Board Diplomat
- Editor of a publication/journal
- Part owner of a publishing company
APPLICATION REVIEW PROCESS

- CME staff reviews completed application and supporting documentation
- CME Office forwards complete and compliant applications to CME Content Expert for review/approval
  - Each SOM department/Center has a CME Content Expert
    - Approve
    - Approve pending additional information
    - Disapproval (rarely happens)
APPLICATION REVIEW PROCESS

• Upon approval from CME Content Expert the CME Office will:
  ◦ Establish a CME Project ID (PID) # (If activity is new, not renewed)
  ◦ Set-up the activity in the CME database, and
  ◦ Add activity to our CME course catalog
    • Accessible on CME Website - http://cme.uthscsa.edu/CourseCatalog
      • We encourage you to paste our link to your website
UPCOMING CONTINUING MEDICAL EDUCATION EVENTS

<table>
<thead>
<tr>
<th>Type</th>
<th>Department</th>
<th>Month</th>
<th>Day</th>
<th>Event Name</th>
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<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>47th Annual Teaching Conference: Pediatrics for the Practitioner</td>
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<td>All</td>
<td>All</td>
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<td>Admittance To Determine Left Ventricular Pressur - Volume Relations In Mice</td>
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<td>Jun 11, 2010 Friday 9:00 AM - 5:00 PM</td>
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<td>2010 Annual Meeting of the Texas Infectious Disease Society</td>
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<td>Jun 11 - 13, 2010 Sunday - Monday 10:00 AM - 3:00 PM</td>
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<td>Admittance To Determine Left Ventricular Pressur - Volume Relations In Mice</td>
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<td>Jul 16, 2010 Friday 9:00 AM - 5:00 PM</td>
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<td>Aug 13, 2010 Friday 9:00 AM - 5:00 PM</td>
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<td>Sep 10, 2010 Friday 9:00 AM - 5:00 PM</td>
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<td>MYOPHAN 2010</td>
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<td>Oct 3 - 7, 2010 Sunday - Thursday 8:15 PM - 5:00 PM</td>
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<td>Oct 8, 2010 Friday 9:00 AM - 5:00 PM</td>
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<td>Nov 12, 2010 Friday 9:00 AM - 5:00 PM</td>
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<td>6th Annual International External Fixation Symposium</td>
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<td>Dec 9 - 11, 2010 Thursday - Saturday 7:10 AM - 6:00 PM</td>
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USE THE FILTERS ABOVE TO NARROW YOUR CHOICES FOR ACTIVITIES
Click HERE for a calendar view
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<thead>
<tr>
<th>Date and Time</th>
<th>Event Name</th>
<th>Location</th>
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<tbody>
<tr>
<td>May 26, 2010</td>
<td>OB GYN Grand Rounds: TBA</td>
<td>School of Medicine 309 - 310L</td>
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<td>Ophthalmology Grand Rounds: Case Presentations</td>
<td>School of Medicine 209L</td>
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<tr>
<td>Jun 2, 2010</td>
<td>Physiology Lecture</td>
<td>Dental School 5.303T</td>
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<tr>
<td>Jun 4, 2010</td>
<td>Ophthalmology Grand Rounds: Case Presentations</td>
<td>School of Medicine 209L</td>
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<td>Friday 8:00 AM</td>
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<td>Jun 9, 2010</td>
<td>Physiology Lecture</td>
<td>Dental School 5.303T</td>
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<td>Jun 11, 2010</td>
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<td>Friday 8:00 AM</td>
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<tr>
<td>Jun 16, 2010</td>
<td>Case Presentations</td>
<td>Dental School 5.303T</td>
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<td>Jun 23, 2010</td>
<td>Research</td>
<td>Dental School 5.303T</td>
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APPROVAL LETTER

• Approval letters sent in September 2010 to:
  ◦ RSS Chair
    • CC – Department Chair/Center Director
    • CC – Department/Center Administrator
    • CC – CME Associate

• Includes ACCME Accreditation Statement and AMA PRA Category 1 Credit Designation Statement

• Request for Commercial Support

• Presentations on Ethics and/or Professional Responsibility Credit

• Administrative Fee
  ◦ IDT or invoice sent after approval notification (September)
  ◦ Due to CME Office within 30 days of receipt of approval letter
COMMERCIAL SUPPORT

- Any request for monetary support from a commercial interest
  - Must be in the form of an *educational grant* completed and submitted by the CME office to the commercial interest.
  - If you wish to receive commercial support we encourage you to consider requesting support for your series rather than individual presentations and are happy to assist you in developing such a request.

- We will need to receive the following information **no less than 90 days prior** to the presentation/series:
  - Company name
  - Amount of grant to be requested
  - Date of the presentation or series
  - Title of the presentation or series
  - Activity budget
  - Activity agenda
COMMERCIAL SUPPORT

In compliance with UTHSCSA CME Office policy and ACCME Standards for Commercial Support all commercial support associated with a CME activity must be given with the full knowledge and approval of the provider (UTHSCSA-CME Office). The terms, conditions and purpose of the commercial support must be documented in a letter of agreement between the commercial entity and the CME Office.

All educational grants are subject to a 10% CME grants management fee.
- 10% of amount received
- CME grants management fee is in addition to activity budget
- When grant funds are received and deposit appears in general ledger, then the grant funds (less 10%) are transferred to respective department/center.
- Example: $5,000 grant received - $4,500 transferred to department/center

All educational grants are subject to reconciliation and unused funds are returned to commercial interests.
ETHICS AND/OR PROFESSIONAL RESPONSIBILITY

• CME Associate must submit the request to RSS Coordinator
  ◦ 2 weeks prior to presentation date (if possible).

• Request should include:
  ◦ Title/Date of presentation
  ◦ Speaker Name(s)
  ◦ Learning Objectives
  ◦ Slide Presentation (preferably *.ppt) or content outline

• CME Office forwards request and supporting documentation to CME Content Expert for Ethics and/or Professional Responsibility determination

• When the request for Ethics and/or Professional Responsibility is approved, RSS Coordinator notifies CME Associate by e-mail
ATTENDANCE AND CME CREDITS

- Submit all Attendance Sheets via fax or campus mail to CME Office within one week of a presentation.
- Participants can request a transcript of all credits for RSS for the past six years.
- Most transcript requests will be turned around within two weeks (10 business days).
  - Effective May 18, 2010 CME transcripts are provided to the participant only.
  - CME database contains RSS attendance data starting in September 2005. Credit information previous to September 2005 is accessible and can take up to 30 days to retrieve.
CME WEBSITE

- Visit our CME Website - http://cme.uthscsa.edu/
- Download forms for completion or distribution
WEBSITE RESOURCES

Visit our CME Website
http://cme.uthscsa.edu

ACCME Website
www.accme.org

AMA Website
www.ama-assn.org

TACME Website
www.tacme.org
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WE ARE HERE TO HELP YOU

Please contact us at any time when you have a question or need help

- The sooner the better
- There are no silly questions
SUMMARY

• What have we covered?
  ◦ Roles/responsibilities of CME Associates and RSS Chairs/Committees
  ◦ UTHSCSA CME policies and procedures for Regularly Scheduled Series
  ◦ Process for submitting complete and compliant RSS CME Applications
  ◦ Process for obtaining approval for ethics and/or professional responsibility
  ◦ Process for obtaining CME Transcripts
  ◦ How to contact the CME Office for assistance
ANY QUESTIONS?
THANK YOU!