

Regularly Scheduled Series (RSS) Handbook

(Grand Rounds, M&M, Lecture Series, Journal Club, etc.)



**UT Health Science Center San Antonio
Office of Continuing Medical Education**

Mailing Address:

**7703 Floyd Curl Drive, MSC 7980
San Antonio, Texas 78229**

Physical Address:

**7411 John Smith Drive, Suite 740
San Antonio, Texas 78229-3900
(210) 567-4491 ♦ Fax: (210) 562-5579**

Email: cme@uthscsa.edu

Website: <http://cme.uthscsa.edu>

Table of Contents

Table of Contents.....	2
Introduction.....	3
Administrative Fees	5
Step-by-Step process for requesting <i>AMA PRA Category 1 Credit</i> [™]	6
Step 1 – Contact the UTHSCSA CME Office	7
Step 2 – Complete the RSS CME Planning Guide.....	8
Step 3 – Submit Sample of Marketing Materials.....	9
Step 4 – Submit Planning Committee and Speaker Documentation	10
Step 5 – Submit Commercial Support Requests	11
Step 6 – Submit Requests for Medical Ethics and/or Professional Responsibility Credit	12
Step 7 – Submit Evaluation Summaries (electronic format).....	13
Step 8 – Submit attendance documentation (electronic format)	14
Step 9 – Submit Final Budget	15
Step 10 – Responsibilities	16
GLOSSARY OF CME TERMS.....	20

Introduction

Regularly Scheduled Series (RSS) are defined as daily, weekly or monthly CME activities that are **primarily planned by** and **presented to** the accredited organization's own professional staff and are designated for credit as one activity. Examples of activities that are planned and presented as a Regularly Scheduled Series are Grand Rounds, Tumor Boards, M&M Conferences, Lecture Series and Journal Club.

The Office of Continuing Medical Education serves as the provider of CME credit for **UT Health Science Center San Antonio School of Medicine (UTHSCSA SOM)**. The CME Office plays a critical role in the planning, implementation and evaluation of all RSS.

UTHSCSA SOM Continuing Medical Education Office has developed a process that monitors all regularly scheduled series ensuring compliance with the Accreditation Council for Continuing Medical Education (ACCME) Essential Areas and Elements, ACCME Standard for Commercial Support and UTHSCSA Policies. This system ensures that activities are:

1. Planned, implemented and evaluated based on real performance data
 - State the learner's performance gaps (for professional practice gaps that are identified in methods other than direct measurement of your professional staff – e.g., national trend data, state level data – explain how you connect these gaps to your own RSS attendees (learners)
 - State the needs you identify based on these gaps
 - Articulate the need in terms of knowledge, competence or performance
 - Incorporate the identified needs into the RSS (state specific topics that will address needs)
 - Describe how the content of your RSS is matched to your learner's current or potential scope of practice
 - Establish improvement measures
 - Describe changes in performance, competence, or patient outcomes that take place as a result of improvements derived from the RSS educational interventions

2. Each UTHSCSA SOM Department or Center that organizes RSS is expected to comply with Institutional and SOM policies located on the Office of CME website and the following step-by-step processes as they relate to how the RSS will be planned, implemented and evaluated. UTHSCSA SOM Departments and Center should consider the following when planning RSS activities:
 - A complete RSS CME Planning Guide must be submitted to the UTHSCSA SOM Office of CME no less than two months prior to the beginning of the RSS. Should grant funding be required, the RSS CME Planning Guide should be submitted four months prior to the beginning of the RSS. This allows time for review and follow up with the Department/Center should there be any questions or additional information required by the Office of CME.
 - There must be at least one individual from the Department or Center who serves as the CME Associate for each RSS series.
 - The CME Associate must participate in CME RSS training and adhere to the UTHSCSA SOM Office of Continuing Medical Education RSS Handbook guidelines.
 - Each RSS series will be required to measure and document the effectiveness of the activity in meeting identified educational needs in terms of satisfaction, knowledge improvement, skill improvement and practice performance, competence and/or patient outcomes. Please see Step 7 and Sample Evaluation form on the Office of CME website Forms and Resources.
 - The UTHSCSA Office of CME has available and accessible to the attendee records with the following information.
 - Name/topic of activity/presentation
 - Date of activity

- Amount of credit claimed/available by the attendee
 - Note – per the AMA PRA/The Physician's Recognition Award (PRA) and credit system 2010 revision :
 - **Credit certificates, transcripts or other documentation available to physicians**
 - Only physicians (MDs, DOs and those with equivalent medical degrees from another country) may be awarded *AMA PRA Category 1 Credit™* by accredited CME providers.
 - **Credit certificates, transcripts or other documentation available to non-physician participants**
 - Non-physician health professionals and other participants may not be awarded *AMA PRA Category 1 Credit™*. However, accredited CME providers may choose to issue documentation of participation to non-physicians that states that the activity was certified for *AMA PRA Category 1 Credit™*.

Participants can download/print a transcript of all CME credits/attendance for RSS for the past six years via <http://cmecourses.uthscsa.edu/credittranscripts.html>.

- The Office of CME customers have access to their transcripts 24/7. Anyone who participates in UTHSCSA CME-sponsored activities (grand rounds, tumor boards, M&M conferences, journal clubs, lecture series, live conferences, internet courses, etc.) has the ability to view and print their CME transcript. All CME credits/attendance will be available for viewing and printing two weeks after receipt of the roster from the sponsoring department.
- It's easy as 1, 2, and 3!
 1. Visit our website: <http://cme.uthscsa.edu/>
 2. Click on "CME TRANSCRIPTS" (left-hand side of the screen) and follow the instructions. **(If you've attended any of our CME activities you already have an account setup – so be sure to login as an existing user using your email address as your username. Use your last name as your password).**
 3. View and print your UTHSCSA CME transcript!
- If you have any questions, please contact the Office of CME via email at cme@uthscsa.edu or at 210.567.4491. We are here to assist you!

Participants may also request a transcript of all CME credits/attendance from the Office of CME at cme@uthscsa.edu. A minimum of 10 business days is needed to process the request.

Administrative Fees

Sessions	Fee
1-12 sessions	\$ 700.00
13-24 sessions	\$ 1,100.00
25-36 sessions	\$ 1,600.00
37-52 sessions	\$ 2,000.00
53-78 sessions	\$ 2,400.00

Other costs:

- For all grant requests, a grants management fee of 10% of the face value of the grant will be charged.
- If you wish to offer your live activity as an enduring material, please contact the Office of CME for a fee schedule.
- If medical ethics credit is requested for a presentation, an additional \$125 fee will be charged.

Step-by-Step process for requesting *AMA PRA Category 1 Credit*[™]

Planning a quality Continuing Medical Education (CME) program is a thoughtful process which often begins a year or more prior to intended activity. The Accreditation Council for Continuing Medical Education (ACCME) requires that the UT Health Science Center San Antonio School of Medicine use planning processes that link identified educational needs with a desired result in its provision of all CME activities. To assist with this process the Manager of the Office of Continuing Medical Education meets annually with UTHSCSA RSS Chairs to discuss how the Office of CME can be involved in the overall planning process for RSS, and to provide ACCME, AMA, or UTHSCSA SOM Office of CME updates for RSS.

If this is a new series, please contact our office as early as possible before you begin to plan the series so we can schedule a meeting. Educational activities that are planned prior to approaching the UTHSCSA Office of CME may not be considered for designation of CME credit.

Following is a step-by-step process to help guide you.. We realize the application process may appear overwhelming and we want to make it as simple as possible for you. If you need assistance, please contact your assigned conference coordinator listed in the table on Page 8.

Step 1 – Contact the UTHSCSA CME Office

The first step is to contact the CME Office to inform us of your intent to plan an RSS and your desire to have this activity designated for *AMA PRA Category 1Credit*[™]. At this time, you can inform us of the dates/times of planning meetings, your target audience, the general description of your RSS, and provide an overview of how the educational need for this activity was identified. Below are some resources that will be helpful in completing the various components of your application.

Website Resources

- A. **CME Forms** - can be found on the Office of CME website under the Forms & Resources tab at http://cme.uthscsa.edu/forms_resources.asp

- B. **Needs assessment** - Below are some web-accessible resources for needs assessment. Your respective conference coordinator is available for assistance..
 - 1. AHRQ National Healthcare Quality Report - <http://statesnapshots.ahrq.gov>
 - 2. US Department of Health and Human Services <http://www.hhs.gov>
 - 3. HHS Office of the Surgeon General - <http://www.surgeongeneral.gov>
 - 4. Texas Health Data - <http://soupfin.tdh.state.tx.us/>
 - 5. Robert Wood Johnson - <http://www.rwjf.org/>
 - 6. JAHCO - <http://www.jointcommission.org/>
 - 7. Council of Medical Specialty Societies (with links to member Specialty Societies) <http://cmss.org/>
 - 8. Journal of the American Medical Association <http://jama.ama-assn.org/>
 - 9. New England Journal of Medicine <http://content.nejm.org/>
 - 10. The Lancet <http://www.thelancet.com/>
 - 11. The State of Quality Healthcare <http://www.ncqa.org/tabid/447/Default.aspx>
 - 12. Institute for Healthcare Improvement <http://www.ihl.org/ihl>
 - 13. National Institute for Quality Improvement and Education <http://www.niqie.org/>

- C. **Outcomes measurement** - Below are some web-accessible resources, which provide helpful information for outcomes measurement. Your respective conference coordinator can provide assistance in developing or implementing outcomes measurement.
 - 1. ACGME Toolbox of Assessment Methods <http://www.chd.ubc.ca/files/file/instructor-resources/Evaluationtoolbox.pdf>
 - 2. ACGME - Outcomes Project (Teaching From a Competency Perspective) <http://www.paeaonline.org/index.php?ht=a/GetDocumentAction/id/110022>
 - 3. AAMC Medportal <https://www.mededportal.org/>
 - 4. HEDIS and Quality Measurement <http://www.ncqa.org/tabid/59/Default.aspx>

Step 2 – Complete the RSS CME Planning Guide

Access the RSS CME Planning Guide at http://cme.uthscsa.edu/forms_resources.asp. Complete the **RSS CME Planning Guide** and submit it to the Office of CME by clicking the submit button. Upon receipt of your planning guide, UTHSCSA CME will review for completion. Completed planning guide documentation will include:

- Source documents which provide evidence that the series is planned based on real data
- Financial disclosure forms for all planning committee members
- Specific educational needs of the target audience (professional performance gaps)
- Overall (general) series learner-focused objectives
- Proposed educational format that is consistent with educational need and learning objectives
- Specified desired results
- Evaluation plan
- Outcomes measurement plan
- Proposed agenda with dates, topics and speakers

After assessment by the Office of CME and determination that the RSS series is at minimum in full compliance with ACCME Essentials and Policies, the CME Office will establish a CME Project ID # for your activity, set-up the activity in the CME database, send a Service Agreement to the department chair, department administrator, RSS chair and CME Associate. The activity will be assigned to a CME Conference Coordinator for RSS who will serve as the liaison between the Office of CME Office and the Department or Center.

If you need assistance completing the RSS CME Planning Guide, please contact your respective conference coordinator listed below.

Cindie Garza GarciaC16@uthscsa.edu 7-4447	Erika Bowen boweneo@uthscsa.edu 7-6531
Cardiothoracic Surgery	Anesthesiology
Emergency Medicine	Cancer Therapy & Research Center
OB/GYN	Center for Medical Humanities & Ethics
Pathology	Family & Community Medicine
Pediatrics	Medicine
Psychiatry	Neurology
Radiology	Ophthalmology
Surgery	Orthopaedics
Transplant Center	

Manager, Office of Continuing Medical Education
Letti Bresnahan
Bresnahan@uthscsa.edu
210-567-0299

Step 3 – Submit Sample of Marketing Materials

A sample of each type of marketing material used to market or announce your RSS series must be attached when submitting the RSS Planning Guide. Marketing materials include flyers, posters, websites and/or e-mails.

All marketing materials must be approved by the Office of CME in advance of their circulation and include one of the following statements in your course brochure, presentations handouts and announcements.

CME Statement Examples:

If you choose to market a single educational activity please use the following:

The UT Health Science Center San Antonio School of Medicine is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

The UT Health Science Center San Antonio School of Medicine designates this live activity up to a maximum of **1.0 AMA PRA Category 1 Credit™**. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Nurses and other healthcare professionals will receive a Certificate of Attendance. For information on applicability and acceptance, please consult your professional licensing board.

If you choose to market the entire annual series please use the following:

The UT Health Science Center San Antonio School of Medicine is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

The UT Health Science Center San Antonio School of Medicine designates this live activity up to a maximum of **52.0 AMA PRA Category 1 Credits™**. Physicians should claim only credit commensurate with the extent of their participation in the activity.

Nurses and other healthcare professionals will receive a Certificate of Attendance. For information on applicability and acceptance, please consult your professional licensing board.

Step 4 – Submit Planning Committee and Speaker Documentation

The following documentation must be submitted with your RSS CME Planning Guide.. All forms can be found on the Office of CME website under the Forms & Resources tab at http://cme.uthscsa.edu/forms_resources.asp.

Biographical Data form - No bio is required for UTHSCSA faculty. Bios are required for all non UTHSCSA speakers who will be presenting during the proposed series. (Please **do not** send CVs. Profiles and Biographical Sketches that contain the same information requested on the CME Biographic Data form are acceptable.)

Financial Disclosure form - is required for all speakers and planning committee members. If a speaker/planner does not provide their completed Financial Disclosure form in advance of the lecture, then the activity cannot be awarded *AMA PRA Category 1 Credit™*.

Step 5 – Submit Commercial Support Requests

***All letters of requests** for educational grants from commercial interests must be sent in writing to the Office of CME 3 months prior to the educational activity and must be approved by the CME Office prior to submission to the commercial interest. All Letters of Agreement for Commercial Support (LOAs) are agreements between the commercial entity and the UTHSCSA SOM CME Office and must be signed by the commercial entity and the UTHSCSA Manager of the Office of Continuing Medical Education prior to the activity taking place. A fully executed LOA should be sent from the commercial supporter to the UTHSCSA SOM Office of CME prior to the educational activity.

*Submission of online requests for educational grants by anyone other than the Office of CME is strictly prohibited by industry.

An additional 10% grants management fee will apply for all educational grant monies received.

Step 6 – Submit Requests for Medical Ethics and/or Professional Responsibility Credit

The Office of CME can facilitate the review of any presentation within the series for compliance with criteria established by the Texas Medical Board regarding Ethics and or Professional Responsibility. To facilitate this process please provide the following information to your CME Conference Coordinator contact no less than 30 days prior to the presentation.

1. Date of presentation
2. Title of presentation
3. Speaker title and biographical information
4. Learning objectives
 - a. For presentations related to medical ethics the learning objectives must mention ethics
 - b. For presentations related to professional responsibility (which include risk management, domestic abuse or child abuse), the learning objectives must mention risk management
5. Presentation slides (preferably in ppt)

If your presentation is approved for Medical Ethics and/or Professional Responsibility you will be required to update your marketing material with the following statement.

For a detailed listing of medical ethics and/or professional responsibility fee schedule see below.

Texas Medical Board Ethics Statement:

This presentation meets the Texas Medical Board criteria for formal continuing medical education involving the study of medical ethics and/or professional responsibility.

Step 7 – Submit Evaluation Summaries (electronic format)

Per the ACCME, attendees of your program must be provided with the opportunity to **evaluate the educational activity's effectiveness in meeting the identified educational need in terms of their satisfaction, knowledge improvement, and skill improvement**. You must provide our office with a sample of the evaluation tool with your completed application that will be used by participants to evaluate the effectiveness of the activity in meeting the identified educational need(s). In other words, there should be an obvious link between the needs assessment, the educational program and the program evaluation. Therefore, development of the evaluation tool also needs to be discussed during the planning process. The Office of CME staff is available to provide training for Google Docs and Survey Monkey in developing effective evaluation templates.

CME Associates are responsible for capturing evaluation results electronically, i.e. through an electronic form via Google Docs, Survey Monkey, summarized Word document, etc.

CME Associates responsibilities in regarding evaluations:

- Create an electronic form via Google Docs, Survey Monkey, Word document, etc.
- Send out an email with link to evaluation or Word document to attendees post-activity. At the conclusion of the RSS session the CME Associate is responsible for providing the Office of CME with a summary of the evaluations. We recommend that the results are shared with the presenter and the planning committee.

Step 8 – Submit attendance documentation (electronic format)

Newly assigned CME associates should contact their assigned CME conference coordinator to schedule training.

Attendance documentation will be accepted only in an electronic format (via Google Docs or by using the Attendance Roster template on the CME website under Forms and Resources/Regularly Scheduled Series)). **Hard copy sign-in sheets will no longer be accepted.** Attendance documentation for each session is due to the Office of CME no later than 5 business days after the session has ended.

The Office of CME will provide:

- Google Docs training
- Access to respective Google Docs electronic form for attendance
- QR Code for use in email communications, on-site flyers, and presentations
- Email broadcast template with link embedded

Departments using Google Docs

Electronic Form will capture relevant information needed by the Office of CME:

- Session title
- Session date
- Attendee name
- Attendee credentials (The CME Office requires credentials as this determines what type of credit (*AMA PRA Category 1 Credit*[™] or Certificate of Attendance) the attendee receives on their transcript.
- Is attendee a Resident?
- Attendee email (for access to online CME transcripts)
- Per the AMA, speakers must self-report *AMA PRA Category 1 Credit*[™] for their lecture time. They cannot claim lecture time via the UTHSCSA department.

“Check-in” Process

1. Onsite (for those with Smart Devices): QR Code on display at activity
2. Post-session (at your desktop/laptop): Link provided onsite and via email. Attendees can sign-in within 48 hours after the end of the activity.

CME Associate responsibility in maintaining attendance via Google Docs:

- Send out an email (template created by Office of CME) to attendees with the link 1-2 days prior to activity
- Include new “check-in” process on their website, if available
- Print out QR Code and place throughout the activity for attendee “check-in”
- Have link available on a slide prior to the activity for attendee “check-in”
- After 48 hours:
 - Export attendance information into an Excel spreadsheet and key all attendees who manually signed in at the activity.
 - Update the Google Docs form to reflect the Session title and date for the following week’s CME session.
 - Delete all registration history in preparation for the following week’s CME session.
- Excel file should be emailed to cme@uthscsa.edu and file name format should be MedGR 10-22-13. Files not in the correct file name format will be returned to the CME Associate for correction.

Departments not using Google Docs

- If your department elects not to use the Google Docs process an electronic excel spreadsheet is still required for attendance documentation. Please use the Attendee Roster template located on the Office of CME website.
- Excel file should be emailed to cme@uthscsa.edu and file name format should be MedGR 10-22-13. Files not in the correct file name format will be returned to the CME Associate for correction.

Step 9 – Submit Final Budget

At the conclusion of your series, we require electronic submission to cme@uthscsa.edu of the following post activity documentation:

- Final budget – use template found on the Office of CME website

Step 10 – Responsibilities

The **RSS Chair/Content Expert** is responsible for the following:

- Ensuring your Regularly Scheduled Series is in compliance with the UTHSCSA Guidelines for Interactions Between Clinicians and Industry, Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Interest the ACCME Essential Areas & Elements, and Institutional and SOM CME policies.
- Completing and signing the **RSS CME Planning Guide**
- Providing the CME Associate with Planning Committee meeting documentation - i.e., minutes, e-mails, etc.
- Providing the CME Associate with Grant request information
- Providing the CME Associate with proposed and confirmed Speaker(s) and their information
- Supporting the CME Associate in obtaining the required documentation from proposed Speaker(s)
- Reviewing speaker presentation(s) to resolve Conflict of Interest (when applicable) and email the respective CME conference coordinator accordingly.
- Complete the Clinical Content Review and Validation form quarterly and when a visiting faculty presents
- Directing each presentation or designate an individual to direct it Completing Verbal Disclosure form (if applicable) located on the Office of CME website

The **CME Associate** is responsible for the following:

- Ensuring your Regularly Scheduled Series is in compliance with the:
 - UTHSCSA Guidelines for Interactions Between Clinicians and Industry
 - UTHSCSA Policy on Conflict of Interest
 - UTHSCSA Policy on Review and Approval of CME Ethics and/or Professional Responsibility Credit
 - UTHSCSA Continuing Education Policy
 - Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Interest
 - ACCME Essential Areas & Elements
- Submitting to the Office of CME:
 - Completed RSS CME Planning Guide with supporting documentation to CME Office
 - Completed Speaker/Planner Financial Disclosure forms
 - Verification that Financial Disclosure took place before presentation
 - Verification may include Financial disclosure on a slide, course handouts, and/or verbally*.
 - *Verbal disclosure requires that a Verbal Disclosure form be completed as proof of documentation.
 - Biographical Data Form for non UTHSCSA Faculty and Staff (Office of CME will not accept CVs)
 - Talent Release Form for non-UTHSCSA faculty if session is videotaped
 - Presentation Learning Objective(s)
 - Marketing Materials (Print and electronic)
 - Evaluation Form and Evaluation Summary
 - Submitting all Attendance information via Google Docs/Attendee Roster template to the Office of CME
 - Submitting Final Budget to the Office of CME
 - Outcome Measures - Performance Improvements

- Providing Grant Request information to Office of CME. All grants and letters of agreement must be processed through the Office of CME.
- All presentations, learning objectives, handouts
- Distributing the learning objectives, disclosure information, accreditation and designation statements in the marketing materials - i.e., flyers, e-mail announcements
- Arranging speaker lodging, travel, and honorarium (if applicable)

The **Office of CME** is responsible for the following:

- Responding promptly to CME inquiries
- Communicating with CME planners on a regular basis regarding updates
- Reviewing the completed **RSS CME Planning Guide** to ensure compliance current ACCME accreditation criteria.
- Review presentations for any commercial bias
- Identify potential conflicts of interest
- Notifying the RSS Chair when there is a Conflict of Interest and provide the RSS Chair with the Speaker's presentation and a Clinical Content Review and Validation Form for completion prior to the speaker's lecture.
- Designating approved regularly scheduled series for *AMA PRA Category 1 Credit™*.
- Tracking CME participation and credit for your RSS activity for up to six years
- Submitting requests for educational grants from commercial interests
- Executing letters of agreement with commercial interest for educational grants
- Communicating updates to CME Associates via emails/newsletters/workshops
- Monitoring the Regularly Scheduled Series usage of ACCME accreditation and AMA designation statements, and the documentation submitted by the CME Associate
- Monitoring the Regularly Scheduled Series for compliance with UTHSCSA CME Guidelines, UTHSCSA Guidelines for Interactions Between Clinicians and Industry, Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Support, and the ACCME Essential Areas & Elements

Office of CME Management Fees:

The Office of CME offers any one of the following services for all CME activities. For a customized quote contact your respective CME Conference Coordinator. Standard services provided for UTHSCSA RSS activities are **highlighted** below.

File Management for CME	
	Inclusive of record data management, credit records, transcripts, audit services for state/national medical board, retention of records
Accreditation Maintenance	Monitoring and ensuring compliance with various accreditation bodies, manage peer review process for content
Online syllabus preparation	Gather, upload, prepare, manage peer review process for content
Faculty Management	Communication with faculty regarding logistics, travel, honoraria, disclosures, syllabus materials
	Collect and review faculty documentation needed for CME accreditation
	Manage disclosure process and conflicts of interest resolution process
Technical Support	Provide on-line registration services
	Develop on-line record of attendance
	Develop an electronic sign-in template
	Develop/maintain on-line evaluation instrument
	Develop on-line evaluation template

	Develop Online certificates and/or transcripts
	Design and manage registration in CME data services
	Upload activity to CME Web site
External credit application process	Gathering and collating all data record for other CE credit applications
Internal business administration	Parking, payment of faculty honoraria & travel expenses
	Coordinate prior approvals
	requirements/coordination of audio visual services
	Prepare name badges, rosters
Marketing	Deposit registration funds/exhibit payments
	Provide direct mail and email services
	Coordinate website and journal posting
	Management and distribution of press releases
Staffing	Exhibit management
	Onsite attendee registration
	Onsite faculty registration
	Onsite exhibitor registration
Administrative and management	Payment of bills
	Close out hotel contract
	Reconcile activity budget
	ACCME annual reporting
	Reconcile grants - budget and outcomes data
Program Director post conference meeting	Electronic evaluation summaries (available only through the use of CME database)
Program Director post conference meeting	Financial Report
	Post-activity meeting
	Pre-planning activities for upcoming year

GLOSSARY OF CME TERMS

(Portions Extracted from ACCME and AMA Guidelines)

Accreditation: The decision by the Accreditation Council for Continuing Medical Education (ACCME®) or recognized state medical society that an organization has met the requirements for a CME provider as outlined by the ACCME. The standard term of accreditation is four years.

Accreditation Council for Continuing Medical Education (ACCME): The ACCME sets the standards for the accreditation of all providers of CME activities. The ACCME has two major functions: the accreditation of providers whose CME activities attract a national audience and the recognition of state or territorial medical societies to accredit providers whose audiences for its CME activities are primarily from that state/territory and contiguous states/territories.

Accreditation Statement: The standard statement that must be used by all accredited institutions and organizations.

Activity: An educational event for physicians, which is based upon identified needs, has a purpose or objectives and is evaluated to assure the needs are met. For RSS, your activity consists of all presentation in your annual series.

Annual Report: The form of data collection that requires an annual submission of data from each accredited provider and allows the ACCME to monitor changes in an individual accredited provider's program and within the population of accredited providers.

Commercial Interest: Any entity producing, marketing, re-selling or distributing health care goods or services consumed by or used on patients. The ACCME does not consider nonprofit or government organizations, non-health care related companies or providers of clinical service directly to patients to be commercial interests.

Commercial Support: Financial or in-kind contributions given by a commercial interest, which is used to pay all or part of the costs of a CME activity. Advertising and exhibit income **is not** considered commercial support.

Conflict of Interest: A conflict of interest exists when person(s) involved in program planning or implementation has personal considerations that could potentially influence the person's ability to be objective and unbiased in performance of program-related duties. In continuing medical education, the undesirable outcome of "conflict of interest" is typically the introduction/demonstration of a bias in favor of a commercial product in return for personal gain.

Continuing Medical Education: Continuing medical education 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.

Credit: The "currency" assigned to hours of CME. Requirements for the designation of credit are determined by the organization responsible for the credit system, e.g., AMA-PRA (Category 1 and 2 Credit), AAFP (Prescribed and Elective Credit), and ACOG (Cognates).

Designation of CME Credit: The declaration that an activity meets the criteria for a specific type of credit. The accredited provider (CME Office) is responsible to these agencies, programs and societies in the matter of designation of credits and verifications of physician attendance.

Documentation Review: The form of data collection that allows the CME office to determine if the required documentation of the standards presented by ACCME has occurred.

Enduring Materials: Enduring materials are printed, recorded or computer-presented activities that may be used over time at various locations and which, in themselves, constitute a planned CME activity. In an enduring material the provider creates the content.

Exhibitor: A representative of a commercial organization which pays a fee for the ability to display products or services related to a CME activity or of interest to the participants of a CME activity in the exhibit area outside a CME activity.

Journal-based CME: A journal-based CME activity includes the reading of an article (or adapted formats for special needs), a provider stipulated/learner directed phase (that may include reflection, discussion, or debate about the material contained in the article(s)) and a requirement for the completion by the learner of a pre-determined set of questions or tasks relating to the content of the material as part of the learning process.

Needs Assessment: Needs Assessment is the process of identifying and analyzing data that reflect the need for a particular CME activity. Needs assessment data could result from a survey of the potential learners, evaluations from previous CME activities, needed health outcomes, identified new skills, etc. Needs assessment data provides the basis for developing learner objectives for any CME activity. The ACCME does not want to limit the scope of CME providers' or learners' educational projects. Part or all of some professionals' practices include important non-clinical, non-patient care elements which are still considered relevant to continuing medical education. When there is a gap between what the professional is doing or accomplishing compared to what is "achievable on the basis of current professional knowledge," there is a professional practice gap.

Objectives: Statements that clearly describe what the **learner** will know or be able to do after participating in the CME activity. The statements should result from the needs assessment data.

Participant: An individual who attends or participates in a CME activity.

Professional Performance/Practice Gap: This is an ACCME adaptation of an Agency for Healthcare Research and Quality (AHRQ) definition of a gap in the quality of patient care – where the gap is "the difference between health care **processes or outcomes** observed in practice, and those **potentially achievable** on the basis of current professional knowledge."

Regularly Scheduled Series: A course is identified as an RSS when it is planned to have **1)** a series with multiple sessions that **2)** occur on an ongoing basis (offered weekly, monthly, or quarterly) and **3)** are primarily planned by and presented to the accredited organization's professional staff. Examples of activities that are planned and presented as a regularly scheduled conference are Grand Rounds, Tumor Boards, Lecture Series, Journal Clubs and M&M Conferences.

Site Review: The form of data collection that allows the CME office to observe an activity and document compliance with the requirements for accreditation.

Support: Funds which help to finance CME activities. Support can come from various sources, including government, private, or commercial. When support is from commercial organizations (such as pharmaceutical or device companies, a letter of agreement for commercial support must be completed and signed by representatives of the accredited sponsor (CME Office) and the commercial supporter.

Abbreviated CME Terms

ACCME	Accreditation Council for Continuing Medical Education
AMA	American Medical Association
COA	Certificate of Attendance
COC	Certificate of Credit
COI	Conflict of Interest
CME	Continuing Medical Education
CPE	Continuing Professional Education
LOA	Letter of Agreement for Commercial Support
PRA	Physician's Recognition Award
RSS	Regularly Scheduled Series
SOA	Statement of Attendance