

Beaumont

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.

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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 Beaumont'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., Beaumont'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., Beaumont's Department of CME) must ensure all CME-certified activities comply with the ACCME Accreditation Criteria, Standards for Commercial Support, and Policies.

- **Michigan Board of Medicine** requires 150 CME credits every 3 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 Beaumont CME. For more information visit <http://www.beaumont.edu/continuing-medical-education/plan-cme-activity/forms-tools>.
- Additional regulatory players in CME can be viewed at <http://www.beaumont.edu/continuing-medical-education/plan-cme-activity/forms-tools>.
- CME department staff will work with you to ensure your CME activity complies with all CME-related policies.

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CME POLICIES AND PROCEDURES FOR RSS

Beaumont's Department of CME certifies more than 200 RSS meetings each year (over 5,000 individual RSS meeting sessions) in addition to over 200 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 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.
- 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).
 - **Flyers must be submitted to the CME department at least 3 days PRIOR to each meeting. Failure to comply may result in withdrawal of CME credits. For full policy, [click here](#) (view page 16 of the "Beaumont Department of CME Policy" book).**

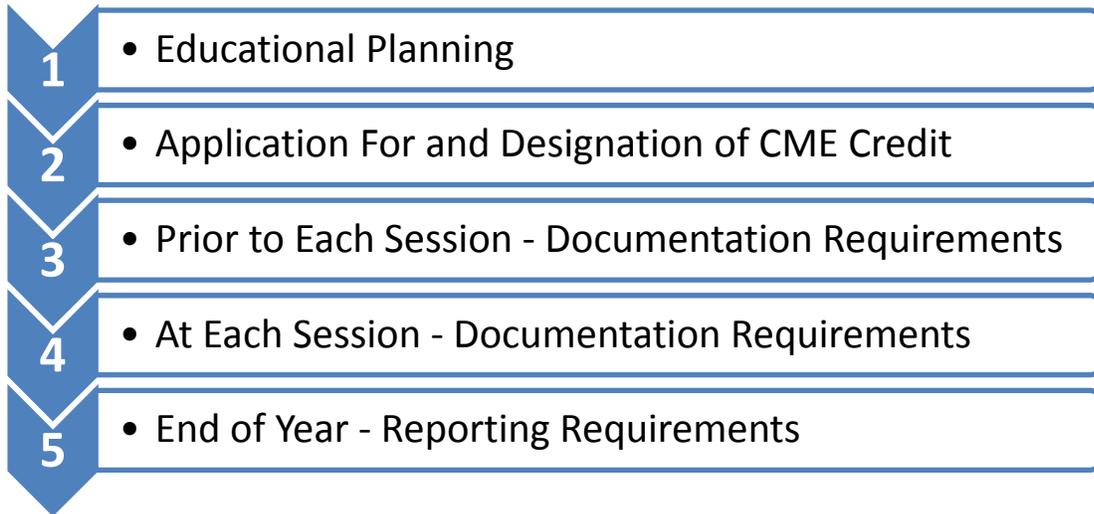
RSS Monitoring and Improvement Plan

All RSS meeting documentation must be received by the CME department **PRIOR** to the meeting date. If documentation is not received within this time frame, an appropriate intervention will take place as identified below. In addition, the below interventions may occur if non-compliance is identified at any point during the CME approval period.

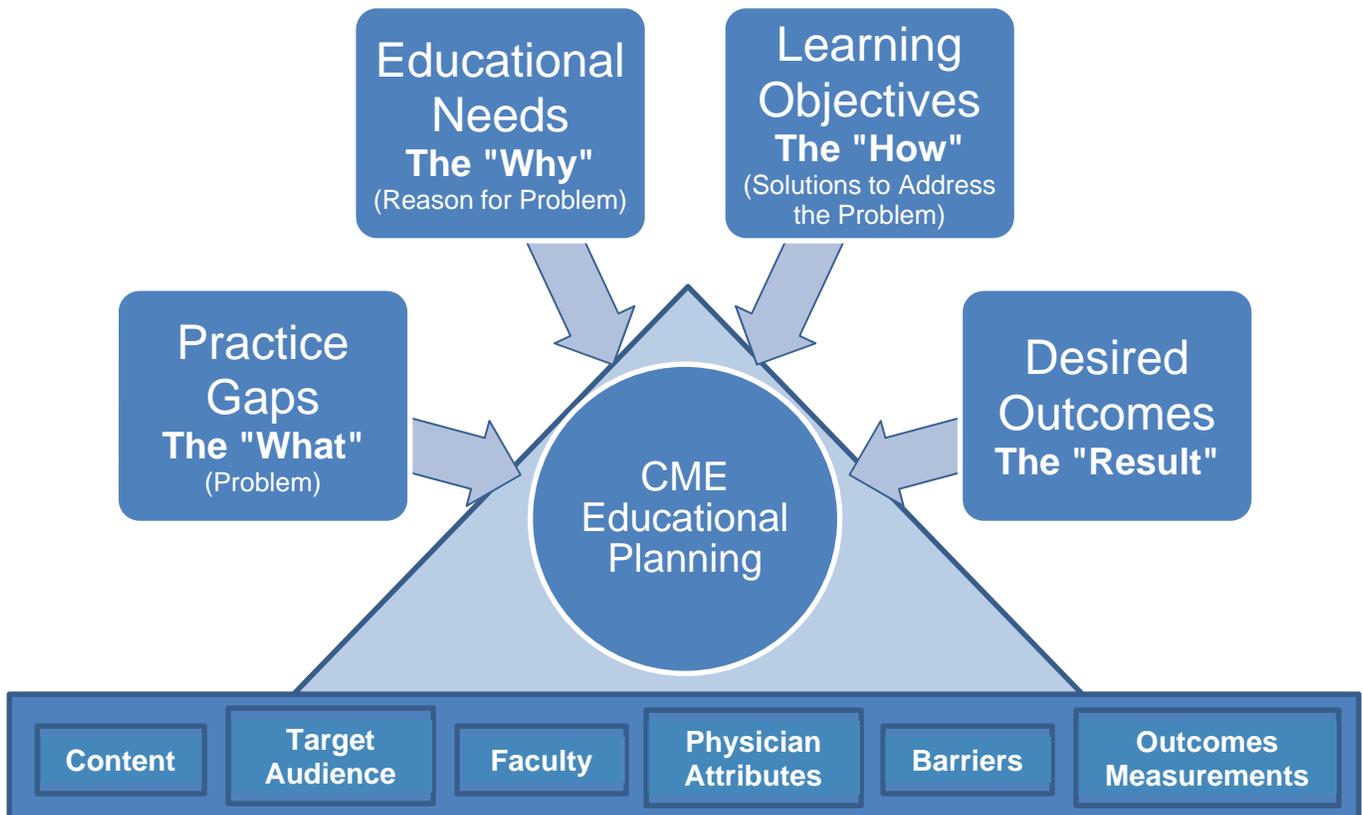
- 1st Intervention: communication/education session with department coordinator(s).
- 2nd Intervention: communication/education session with department coordinator(s) and course director(s).
- 3rd Intervention: withdrawal of CME credits from applicable meeting session(s).
- 4th Intervention: withdrawal of CME credits from applicable meeting session(s) as well as all remaining meeting sessions in the series through the remainder of the approval period (December 31).

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RSS PLANNING AND EXECUTION OVERVIEW



EDUCATIONAL PLANNING



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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 Beaumont 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. The disclosure form should be completed online at <https://beaumont.cloud-cme.com>.
- 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.).
- Review of Beaumont and Accreditation Council for Continuing Medical Education (ACCME) guidelines.

Beaumont Health 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. Beaumont cannot retroactively provide CME credits per the American Medical Association (owner of the CME credit system). For information on other organizations that provide different types of credit, contact the CME department at cme@beaumont.edu.

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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.

How do I know if a disclosure has already been completed?

Beaumont CME uses an online disclosure system. All disclosures are valid for 12 months from the date the disclosure was completed. It is the individual's responsibility to update their disclosure if a relationship changes during this 12 months.

CME will assign you access to completed disclosure forms through the CME portal at <https://beaumont.cloud-cme.com>. Sign-in and click 'Administration' at the bottom. Contact cme@beaumont.edu if you have any problems accessing or using the report.

What if there is a COI?

If the individual indicates they do have a COI (relevant financial relationships to disclose), then the CME department must review the presentation slides prior to their presentation in order to resolve the relationships. See page 7 for additional information.

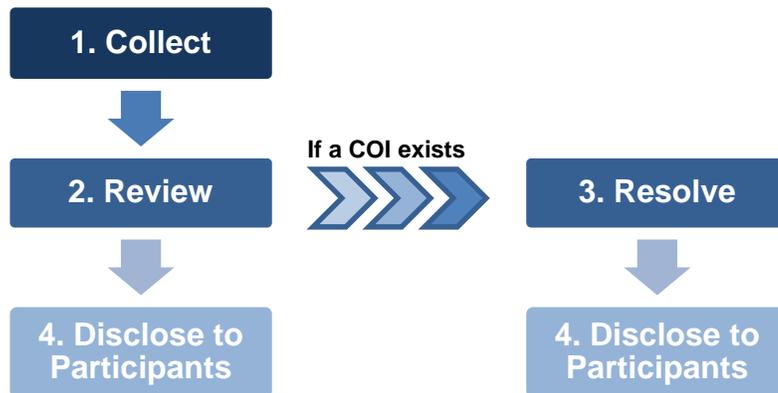
¹ **ACCME Definition of a Commercial Interest:** any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients.

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.

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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**.
- Disclosure forms can be completed online at: <https://beaumont.cloud-cme.com>.

2. Review of Disclosure Forms

- You can access the results of the online CME disclosure form at <https://beaumont.cloud-cme.com>. Sign-in and click 'Administration' at the bottom of the screen. Contact cme@beaumont.edu if you need assistance.
- 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 presentation slides at least 1 week prior to their presentation. The CME department will review the presentation for bias. If biased, the CME department will advise certain content changes to bring the presentation into compliance.

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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 – 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.**

Currently, the CME Conflict of Interest disclosure form is separate from the Beaumont Health institutional conflict of interest form. CME is not able to access the institutional conflict of interest information and therefore, a separate CME conflict of interest form must be completed.

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 a Beaumont 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.

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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.

The disclosure form can be completed online at: <https://beaumont.cloud-cme.com>.



RESOLUTION OF CONFLICTS OF INTEREST (ACCME Standard 2): If an individual has identified a financial relationship on their CME disclosure, then their content (presentation slides) 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 – 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** (NOTE: the CME department must be cc'd on the email and the email must be **sent at least 3 days prior** to the meeting date if this method is utilized).
- **Flyer posted in the room and visible as individuals enter the room** (NOTE: the CME department must receive an electronic copy of this flyer **at least 3 days prior** to the meeting date if this method is utilized).

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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

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 Director of CME is authorized to sign grant agreements on behalf of Beaumont.**
- Once the letter of agreement is fully executed (signed by the company and the Director 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.).

The Beaumont CME Letter of Agreement template as well as additional “Helpful Hints for Grants” can be accessed at <http://www.beaumont.edu/continuing-medical-education/plan-cme-activity/forms-tools> (under Grants & Exhibits section).



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).

Additional “Helpful Hints for Exhibits” as well as the Beaumont Exhibitor Agreement template can be accessed at <http://www.beaumont.edu/continuing-medical-education/plan-cme-activity/forms-tools>.

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Sample CME Flyer

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Nutritional Health and Integrative Medicine Meeting #24519 **[INSERT DATE]**

10:00 a.m. – 12:00 p.m. • Beaumont Health Center Library

[INSERT PRESENTATION TITLE]

SPEAKER: [INSERT SPEAKER]

Disclosures must match COI forms

All text highlighted in gray must be updated by the department prior to distribution/posting.

CME INFORMATION

Disclosures:
Katherine Nori, MD (course director), Maureen Anderson, MD (planning committee) have no relevant financial relationships with commercial interests to disclose. Beaumont Health implemented mechanisms to identify and resolve conflicts of interest for all individuals in a position to control content of this CME activity. All CME staff and content reviewers have no relevant financial relationships with commercial interests to disclose.

Speaker: All individuals involved with the discussion have no relationships to disclose.

Educational Objectives:
Those participating in this series should be better able to:

- Develop nutritional and integrative medicine guidelines that can be used for treatment options and strategies.
- Apply strategies to improve outcomes in all patient types using evidence-based nutritional and integrative medicine treatment modalities.
- Review current challenging cases among the nutritional and integrative medicine programs to improve patient outcomes and to prompt learning and identify further practice gaps.

ACCREDITATION and CREDIT DESIGNATION:
Beaumont Health is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

Beaumont Health designates this live activity for a maximum of 2.0 *AMA PRA Category 1 Credit(s)*™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

****CLAIM CME CREDITS****

TEXT **24519** to **313-329-7050** within 1 hour after the meeting
OR – ONLINE at <https://beaumont.cloud-cme.com>

All information in the red box must be communicated to learners before each meeting session. This information is locked by CME; to have it updated, contact CME.

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REQUIRED STEPS BEFORE EACH MEETING OF AN RSS SERIES

The following documentation must be submitted to CME 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 and a copy provided to the CME office before the meeting occurs. You can list multiple dates, speakers and topics on each flyer.**
 - **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 email must be sent prior to the meeting date and your assigned CME staff member must be cc'd on the email for documentation purposes).
 - **FAX:** a third option is to include the information on a fax cover sheet (NOTE: the fax must be sent prior to the meeting date and your assigned CME staff member must be a recipient of the fax as well for documentation purposes).
2. **Educational Grant** – if your meeting will receive an educational grant, a grant letter of agreement must be signed by the Director of CME AND the company providing the grant PRIOR to the meeting.

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 a copy of the grant check and 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.

Please note, if no financial support was received for any meetings, but you did have meeting expenses (i.e., honoraria, travel, food, etc.), you will be required to report these expenses to CME during the annual closeout and renewal process. To assist you with tracking these expenses throughout the year, a budget template is available at <http://www.beaumont.edu/continuing-medical-education/plan-cme-activity/forms-tools> (under Application section).

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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, CloudCME, 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 this report often and remind your participants to claim their CME credits! Low CME credit claims may result in your meeting not being renewed for CME credits.
- **Credits** – this is another way to view CME credits claimed for your meeting – it provides a list of everyone who received credit on each date
- **Faculty Disclosures** – view all completed disclosures easily
- **Transcript Report** – view, download, print CME credit transcripts for your providers

TOOLS AND RESOURCES

CME Website:

Visit <http://www.beaumont.edu/continuing-medical-education/plan-cme-activity/forms-tools> for all available tools and resources.

CME Contacts:

- Sherrie Ode, CME RSS Coordinator, 248-551-0429 or sode@beaumont.edu
- Linda Fennell, CME Administrative Assistant, 248-551-0200 or linda.fennell@beaumont.org
- Brooke Taylor, Director of CME, 248-551-0908 or brooke.taylor@beaumont.edu