

Series Policy

Recurring live meetings (Series), are activities that are comprised of a number of “sessions” held several times during the course of a year. Series will be sponsored by the Case Western Reserve University CME Program in order to provide diverse educational opportunities throughout the CWRU School of Medicine and its affiliated teaching hospitals, sustain faculty/physician performance improvement, and support clinical integration of UH Cleveland Medical Center (UHCMC) and its affiliated healthcare providers at their points of service.

To assure that Series are planned and implemented in accordance with the **ACCME Accreditation Requirements and Policies, including the Standards for Commercial Support**, the Activity Director of the Series must agree to the terms and conditions of the following policy prior to commitment by the CME Program to sponsor or renew sponsorship of the Activity:

- 1. Sponsorship Agreement:** The sponsorship agreement for the activity must be submitted by the Activity Director or designated representative to the CME Program at an interval sufficient for full evaluation prior to the first session. No sessions may be held unless a signed and fully executed sponsorship agreement is in place for both initial activity sponsorship and activity renewals.
- 2. Eligibility:** The Activity Director of a Series must be an active staff member of the CWRU School of Medicine or on the Medical Staff of UHCMC or another CWRU teaching affiliate.
- 3. Planning Committee:** The Activity is guided by a planning committee representing both the prospective audience and the faculty providing the education. The Activity Director and all members of the planning committee must disclose financial relationships as required by the Standards for Commercial Support.
- 4. CME Program Mission:** The content and design of the activity fit the Mission of the CME Program.
- 5. Professional Practice Gaps, Needs, Learning Objectives and Educational Design:** The planning committee develops a Statement of Need based on their learner’s Professional Practice Gaps and assessment of the audience’s educational needs. From this information, global Learning Objectives are identified. The committee designs the educational structure most appropriate to affect knowledge, performance, competence and change behavior as intended.
- 6. Compliance:** The Activity Director agrees to comply with all *ACCME Accreditation Requirements and Policies, including the Standards for Commercial Support*, in accordance with the policies and procedures established by the CME Program.
- 7. Submission of Documentation:** It is the Activity Director’s responsibility to assure that required documentation from each session of the Series is received by the CME Program Manager according to the information provided in the approval letter and on the Series Checklist. All required documentation is requested 2 weeks prior to each activity. If not received within 5 days of the activity, accreditation for that activity will be revoked. Complete post session documentation must be received not more than 30 days following the session. If such documentation is not received within 30 days, it may be necessary to suspend the activity.
- 8. Commercial Support:** Whenever funds are contributed in support of the activity or a session of the activity, commercial support agreements (typically referred to as “letters of agreement”)

compliant with the *Standards for Commercial Support* must be appropriately authorized and provided to the CME Program along with copies of checks for the related grants, and a final reconciliation of how the funds were used. Exhibit Fees can also be accepted from a commercial entity. An Exhibit Agreement is required for each exhibit fee, as well as a copy of the check. No matter how funds are received, a commercial entity may NOT pay directly for any expenses related to an accredited conference (i.e. food, travel, honorarium, etc.) under any circumstances.

9. **Disclosure of Financial Relationship and Resolution of Conflict of Interest:** Activity Directors must obtain disclosure of financial relationships from activity planners that participate in the planning of the activity, and from all faculty before any and all presentations; and resolve any real or apparent conflicts of interest as discussed in the CME Program's Commercial Support Policy. Review of documentation of disclosure and conflict of interest resolution by the CME Program will take place retrospectively on submission on a session by session basis. Action may be taken thereafter as necessary if concern is raised about the management of any instance of perceived or actual conflict of interest. Activity Directors must assure that every presenter's disclosure is received and made part of the marketing flyer, and that the presenter verbally discloses at the beginning of his/her presentation.

10. **Evaluation Plan:** The activity planning committee will offer a systematic Evaluation Plan for the Activity.

11. **Monitoring:** The Activity will be monitored by the CME Program for compliance with this Series Policy. The CME Program will support performance improvement initiatives to assure compliance when called for. Monitoring will involve session attendance by a CME Program staff member periodically. Deficiencies in compliance will be documented and brought to the attention of the Activity Director within 30 days of the date the deficiency is noted.

12. **Improvement Plan:** A plan for improvement will be developed, documented in writing to the CME Program and implemented by the Activity Director. This plan will be reviewed at the time of sponsorship renewal of the Activity or sooner if designated by the CME Program.

13. **Suspension of an Activity:** Failure to bring the Activity into compliance is cause for suspension of the Activity until such time as the elements for full compliance are demonstrated to be in place. Sponsorship for activities which cannot resolve such defaults may be cancelled under CME Program policy. CME credit for individual participants cannot be earned while an Activity is under suspension. Sponsorship of an activity not in compliance at a level acceptable to the CME Program will not be renewed subject to review by the CME Advisory Committee.

14. **Fees:** The provider of the Series agrees to pay an annual sponsorship and session fee as designated by the CME Program.

15. **Attendance Transcripts:** The CME Program will provide learners with current, accurate data on their participation in the Activity in the form of a transcript. Attendance data will be maintained for six years. Individual transcripts may be obtained through our website. This service is complimentary.

16. **Graphic Identity and Publicity:** Case Western Reserve University, UHCMC and other affiliated teaching hospitals must be properly identified on all publicity materials. The format for all publicity materials must be reviewed and approved by the CME Program prior to publication or listing.