

## CME Handbook - Activity Planning

### Planning a CME Activity at CMKC

Those creating an educational activity targeted to physicians are encouraged to apply for CME credit for their activity. Activities considering CME should have a planning committee comprised of representatives reflecting the target audience for the activity, with an identified Course Director. The Course Director is responsible for ensuring the activity addresses the professional practice gaps of physicians, is free of commercial influence, and is fiscally sound. They agree to familiarize themselves with ACCME guidelines and, if approved for CME, to collaborate with the CME office on planning, implementation, and evaluation of the activity. Other planning committee members can assist Course Directors with these responsibilities. There can also be activity coordinators involved in the planning and implementation of the activity.

1. Complete a [CE Pre-Planning Form](#) *PRIOR* to developing content. **Failure to include the CME office from the beginning could result in denial of CME.**
2. Identified planners of the activity, including the course director and any others currently involved in the activity, must complete a Relevant Financial Relationship Form online.
3. Preliminary agenda or schedule (if available)
  - a. For a single activity, an outline of the proposed schedule can be sent.
  - b. If the activity is ongoing, i.e. a regularly schedule series, please include a preliminary schedule, list of topics, etc.

Once the above items are received, the CME Office will review the application, including submitted relevant financial relationship forms, and an approval decision will be made.

### Oversight of CME Activities at Children's Mercy

It is the CME office's responsibility to maintain Children's Mercy CME accreditation through Accreditation Council for Continuing Medical Education (ACCME). To ensure compliance with accreditation guidelines, we must oversee and have visibility to all CME activities at CMKC. This oversight includes involvement in planning the activity, receiving updates or changes to approved activities, invitations/access to the activity, and receiving required documentation prior to the activity. This oversight also includes reuse of CME recordings and/or presentations beyond the intended activity.

### Relevant Financial Relationship Forms

To comply with the *Standards of Integrity and Independence in Accredited Continuing Education*<sup>i</sup>, anyone considered in control of content, including planning members, faculty, etc., must complete a Relevant Financial Relationship Form online before the activity occurs. Forms completed online will remain active for 1 year, meaning those involved in planning or presenting at multiple CMKC activities over a year will only have to complete the form once (however, faculty can update this form at any time and are encouraged to do this when a known relationship begins). Planners can check CloudCME to see if forms have been completed.

Relevant Financial Relationship forms are reviewed, and mitigated as needed, by the CME Office. The Course Director, or their designee, is responsible for notifying the CME Office of any changes to the planning committee, faculty, education gap, learning outcomes, or activity schedule, so adjustments to

## CME Handbook - Activity Planning

CME approval and/or hours offered can be made. Failure to communicate these changes in a timely manner may result in interventions (below) or withdrawal of CME approval.

### Activity Implementation

Once approved, the CME Office can consult on the activity, but it is the activity planning committee's responsibility to manage their activity and provide required documentation back to the CME Office.

Upon approval, the CME office will provide a document to the planning committee outlining responsibilities and associated deadlines for each. Failure to meet deadlines could result in withdrawal of CME for the activity.

CME accreditation guidelines impact many aspects of the activity, so the CME Office should be informed or consulted on a broad range of activity-related items. These items include, but are not limited to:

- Speaker forms
  - o Relevant financial relationship forms
  - o Title and objectives
  - o Speaker agreement forms, if any, such as presentation release forms, honoraria agreements, etc.
- Marketing efforts – ads, brochures, emails, etc.
  - o All marketing for a CME approved activity must include the CME statement, provided by the CME Office.
  - o The CME Office should review materials prior to their distribution to ensure compliance with ACCME guidelines.
  - o This can include:
    - Emails
    - Brochures
    - Ads
    - Participant materials/handouts
- Attendance capture system
  - o Can be captured through CloudCME
  - o If captured outside of CloudCME, the CME office must receive a spreadsheet with the following information on each attendee:
    - First Name
    - Last Name
    - Email
    - Credentials
- Evaluation of the activity
  - o Can be captured through CloudCME if notice is given to CME office at least 1 month before activity
  - o Evaluations not managed in CloudCME must be reviewed by the CME Office to ensure they meet ACCME guidelines and accurately measure the desired outcome(s) of the activity.
- Financial Support

## CME Handbook - Activity Planning

- ACCME Standards of Integrity and Independence requires the CME provider review/approve all grant agreements to ensure compliance. We also must retain a copy of the agreement in our activity files.
- This includes:
  - Government monetary grants
  - Private money donations
  - Advertising income
  - Registration income
  - In-kind support
- Grants & Exhibitors
  - Education must be approved for CME prior to promotion of the activity and/or requests for funding (grants or exhibits).
  - CME approved education must be separated from exhibitors and potential marketing efforts, both by physical space and/or time.
  - The CME Office can assist with ensuring regulatory requirements are met for those CME approved activities that accept exhibitors.
  - We must also include exhibit income received for activities in our annual report.

### One Week Prior to the Activity the CME Office must have:

- All Relevant Financial Relationship forms
- Learning Objectives
- Presentations (or content)

### One Week After the Activity the CME Office should receive:

- Attendance
- Evaluation Data
- Registration revenue
- Other funding – grants, exhibits, etc.

### **Activity Monitoring and Improvement Interventions:**

As course directors and activity planners, you assume responsibility for ensuring approved activities comply with all accreditation criteria and keeping the CME Office informed of any changes to the activity. The CME Office is here to assist you with this, but we cannot be directly involved with each approved activity at Children's Mercy. Instead, the CME Office will audit courses periodically. During this review, if criteria are not being met, the countermeasures below will be utilized:

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

## CME Handbook - Activity Planning

### **Special Considerations**

#### **CME Activities Associated with Grant or Research Funding**

Many times, grant or research projects include an educational component. Those considering a grant or research proposal that wish to include CME-approved education must engage the CME office prior to developing the education and submitting their proposal. To meet CME requirements, the activity must be planned and approved prior to applying for grant funding.

CME approved activities offered in conjunction with funding from a grant or research project may be subject to a CME fee. This fee helps offset expenses associated with CME staff and resources that are needed to help develop, implement, and report on these CME activities. The fee is determined by several factors including, but not limited to, the type of activity, hours of education, how long the activity will be active, etc.

Please contact the CME department for information on potential CME fees so it can be taken into consideration and included in the grant proposal.

#### **Jointly Provided<sup>ii</sup> CME**

Children's Mercy CME department does approve some jointly sponsored CME activities. Approval of such activities is based on several factors, including but not limited to current resources, type of activity, target audience, etc.

Please see the CMKC Joint Providership Guidelines and Joint Providership Agreement or contact the CME office for more information.

#### **Use of Online Courses**

Online courses are developed and intended for individual learners. Online courses should not be used in group learning settings. Those interested in pediatric topics for group training should contact [Provider Relations](#) to learn more about available topics and how to arrange for CMH faculty to present.

## CME Handbook - Activity Planning

### References

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<sup>i</sup> Accreditation Council for Continuing Medical Education, Standards for Integrity and Independence in Accredited Continuing Education; December 2020; [https://accme.org/sites/default/files/2022-06/884\\_20220623\\_Standards%20for%20Integrity%20and%20Independence%20in%20Accredited%20Continuing%20Education.pdf](https://accme.org/sites/default/files/2022-06/884_20220623_Standards%20for%20Integrity%20and%20Independence%20in%20Accredited%20Continuing%20Education.pdf)

<sup>ii</sup> [Children's Mercy Kansas City CME Handbook – About CME](#), page 3