

ISMA CME PROVIDER CONFERENCE

MAY 20, 2022



ACCME Update

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Recognition, ACCME



Agenda

1. ACCME Updates
 - ✓ ACCME Academy
 - ✓ CE Educators Toolkit and Worksheet Guide
 - ✓ Advancing Social Justice Resources
2. ACCME's Standards for Integrity and Independence



ACCME ACADEMY

- ACCME's Learning Management System
- Home for self-directed learning and resources for CE Professionals

ACCME Academy

- For Accredited Providers, there are 14 courses available for free and two curricula available for purchase
- For non-accredited individuals, there are 11 courses/curricula available for purchase on the public dashboard
- Top Courses in the Academy:
 - *Academy Answers*
 - *Concepts for CE Planning Explained*
 - *Accreditation Tips*
 - *Key Concepts in the Standards for Integrity and Independence*
 - *Demonstrate the Value of CE*

What do you want to do?

I want to develop skills and strategies for building and improving my CE program.

**Academy
Answers for
CE Program
Management**



I want simple strategies for meeting the accreditation requirements and pursuing Commendation.

**Accreditation
Tips**



I want to ensure my program and faculty follow the Standards for Integrity and Independence in Accredited CE.

**Tools for
Integrity and
Independence**



I want to equip my faculty with educational strategies and teaching tools for effective, engaging education.

**Effective
Teaching
Toolbox**



I want to find strategies for designing education that promotes equity and is accessible to all learners.

**Education for
Equity and
Access**



I'm new to the CE office and want to learn more about accreditation.

**Accredited CE
Orientation:
New Staff**



I want to train my faculty on how to use the accreditation requirements to support educational planning.

**Accredited CE
Orientation:
New Faculty**



à la carte purchase

Who has access?



WELCOME TO
ACCME
Academy

FREE

All accredited providers (ACCME, state-accredited, Joint Accredited) get enrollment keys to create 3 user accounts.

**ADD
USERS**

Purchase access for additional users at academy.accme.org

Need access for >10 users?
Contact us at academy@accme.org

Get Assistance

- Check out the FAQs page
- Take the “Getting Started with ACCME Academy” course
- Email academy@accme.org



Frequently Asked Questions

The answers to your questions

I've completed my course, but it still shows as “Re-enroll” inst...

Can I sign up for ACCME Academy? How do I sign up?

What information do I need to sign

Do I need to purchase a course on

How do I login?



Getting Started with ACCME Academy

Online Course · 15m

★★★★★ (8)

Start



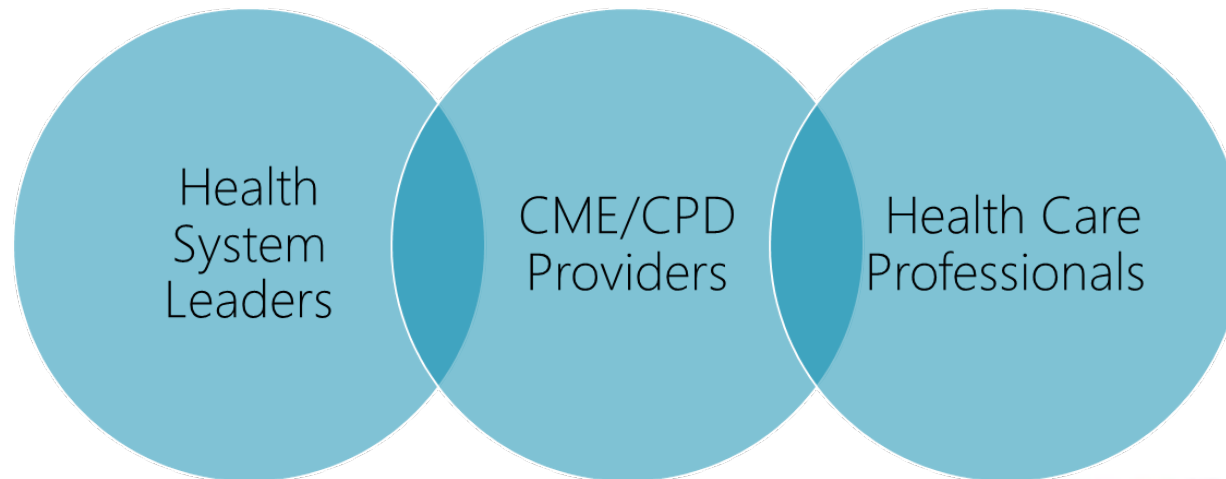


CE EDUCATOR'S TOOLKIT

- Provides best practices in educational design
- Developed by the Society for Academic CME through an ACCME research grant
- Provides instruction on developing:
 - Small-group learning
 - Case-based learning
 - Reflective learning

Why a CE Toolkit

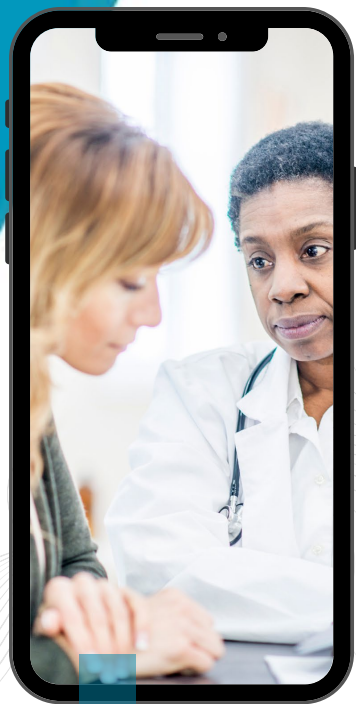
An educational toolkit provides a tool to facilitate the recognition, understanding, and **deployment of effective educational strategies** for CPD among CE professionals, regardless of experience level.



What's in it?

- [CE Educator's Toolkit](#)-189pp PDF
 - Use of the toolkit
 - Educational design
 - Step by step development for implementing the three strategies
 - Quick guide to assessing and evaluating CE interventions
- [Worksheet Guide](#)-21 pp PDF
 - Assistive resources to help continuing education (CE) leaders through the planning and development phases of their educational sessions.

Thank You



The Society for Academic Continuing Medical Education

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Accreditation Council for Continuing Medical Education

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Debbie Brucki

Any questions: info@accme.org



Take a picture to
view the toolkit



ADVANCING SOCIAL JUSTICE RESOURCES

- Promoting diversity and inclusion:
ACCME Strategic Goal
- Videos and resources
- Respond to healthcare inequities and
social injustices in the context of the
healthcare education environment
- Includes the **Meeting Challenges
Together** webinar series

Advancing Social Justice Resources

Home / Advancing Social Justice Resources

SHARE THIS PAGE



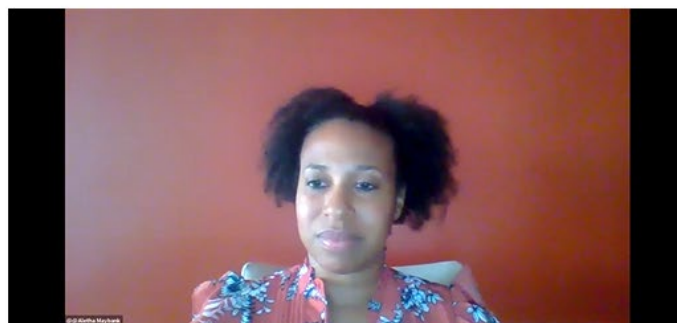
This page includes videos and resources to help accredited continuing education leaders, clinician educators, and administrators respond to healthcare inequities and social injustices. As an educational community, we have an opportunity to be part of the solution, navigating a path from empathy to understanding to action.

This resource page is part of the **Meeting Challenges Together** webinar series, created to convene our accredited continuing education community to address important, topical concerns and opportunities for our learners, educational teams, organizations, and the communities we serve.

Share these resources and tag us on [Facebook](#) or [Twitter](#) using the hashtag #MeetingChallengesTogether.

If you have any questions, please contact us at info@accme.org. We're here to help.

Archived Webinar



- [Advancing Social Justice Webinar PowerPoint Slides](#)
- [Advancing Social Justice Webinar Participant List](#)

- ✦ Train clinicians to recognize implicit bias in their own perceptions and practices
- ✦ Incorporate empathy training into your continuing education curricula
- ✦ Address equity, diversity, and inclusion (EDI) through your program's continuing education practice and activities
- ✦ Pursuing policy development for equity in CME division and organization

<https://www.accme.org/advancing-social-justice-resources>



STANDARDS FOR INTEGRITY AND INDEPENDENCE

Standards for Integrity and Independence in Accredited Continuing Education

Adopted by:



Accreditation Council for Continuing Medical Education (ACCME)



American Nurses Credentialing Center (ANCC)



Accreditation Council for Pharmacy Education (ACPE)



American Osteopathic Association



American Academy of Family Physicians (AAFP)



Association of Regulatory Boards of Optometry's Council on Optometric Practitioner Education (ARBO/COPE)



American Academy of PAs (AAPA)



Joint Accreditation for Interprofessional Continuing Education™

Standards

- Preamble/Eligibility (all)
- Standard 1: Ensure Content is Valid (all)
- Standard 2: Prevent Commercial Bias and Marketing in Accredited Continuing Education (all)
- Standard 3: Identify, Mitigate, and Disclose Relevant Financial Relationships (all)
- Standard 4: Manage Commercial Support Appropriately (only if applicable)
- Standard 5: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education (only if applicable)

No disclosures needed

Non-clinical activities

- ✓ leadership, communication skills etc.

Spontaneous case conversations among peers

- ✓ Hallway discussions, consults at the bedside

Self-directed education

- ✓ learning from teaching, remediation, personal development plan

NEW STANDARDS RESOURCES

Standards Toolkit – Now in an Editable Microsoft Word Version

- ✓ Tools for Identifying, Mitigating, and Disclosing Relevant Financial Relationships
- ✓ Tools for Ensuring Valid Clinical Content
- ✓ Quick Tool to Simplify Educational Planning When Identification, Mitigation, and Disclosure is Not Required



Available now at <http://www.accme.org/standards-resources>



Template for Collecting Information about All Financial Relationships from Planners, Faculty, and Others: Page 4 of Toolkit

Your
Logo
Here

Template for Collecting Information about All Financial Relationships from Planners, Faculty, and Others

For more information, visit
accme.org/standards

To be completed by education staff.

Name of Individual:

Title of Continuing Education:

Date and location of Education:



Individual's prospective role(s) in education

Identify the prospective role(s) that this person may have in the planning and delivery of this education (choose all that apply)

- ☐ Planner
Examples: planning committee, staff involved in choosing topics, faculty, or content
- ☐ Teacher, Instructor, Faculty
- ☐ Author, Writer
- ☐ Reviewer
- ☐ Other

As a prospective planner or faculty member, we would like to ask for your help in protecting our learning environment from industry influence. Please complete the form below and return it to [Contact Name/email](#) by [Date](#).

The ACCME Standards for Integrity and Independence require that we disqualify individuals who refuse to provide this information from involvement in the planning and implementation of accredited continuing education. Thank you for your diligence and assistance. If you have questions, please contact us at [Contact Name/email](#).

To be Completed by Planner, Faculty, or Others Who May Control Educational Content

Please disclose all financial relationships that you have had in the past 24 months with ineligible companies (see definition below). For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s). There is no minimum financial threshold; we ask that you disclose all financial relationships, regardless of the amount, with ineligible companies. You should disclose all financial relationships regardless of the potential relevance of each relationship to the education.

Enter the Name of Ineligible Company
An ineligible company is any entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. For specific examples of ineligible companies visit accme.org/standards.

Enter the Nature of Financial Relationship
Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed. Diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

Has the Relationship Ended?
If the financial relationship existed during the last 24 months, but has now ended, please check the box in this column. This will help the education staff determine if any mitigation steps need to be taken.

Example: ABC Company

Consultant

☒

☐

☐

☐

☐

☐

☐



In the past 24 months, I have not had any financial relationships with any ineligible companies.

I attest that the above information is correct as of this date of submission.

Date:

Template for Collecting Information about All Financial Relationships from Planners, Faculty, and Others:

Page 4 of Toolkit

To be Completed by Planner, Faculty, or Others Who May Control Educational Content

Please disclose **all financial relationships** that you have had in the **past 24 months** with ineligible companies (see definition below). For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s). There is no minimum financial threshold; we ask that you disclose all financial relationships, regardless of the amount, with ineligible companies. You should disclose all financial relationships regardless of the potential relevance of each relationship to the education.

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Enter the Nature of Financial Relationship
Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

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Example: ABC Company

Consultant

☒

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In the **past 24 months**, I have not had any financial relationships with any ineligible companies.

ACCREDITATION PROCESS

Excel Spreadsheet for Documenting Financial Relationships

- Used in ACCME's accreditation process
- Applies to all performance in practice not under Standard 3 exceptions
- Efficient way to track management of financial relationships
- Where to find the template:
 - ✓ ACCME Website > Publications > Accreditation Requirements and Fees > Reaccreditation
 - ✓ <http://www.accme.org/standards-resources>

ACCREDITATION PROCESS

Excel Spreadsheet for Documenting Financial Relationships

Name of Individual	Individual's Role(s) in Activity	Name of Ineligible Company(s)	Nature of Relationship(s)	Mechanism(s) Implemented to Mitigate Relevant Financial Relationships Appropriate to Role(s) in the Activity
Pat Stuart, MD, MPH	Activity Director, Speaker	Starfleet Pharmaceuticals	Speaker's bureau, Stock Options	Activity Director Role: Review of planning decisions by nonconflicted planner: L. Nimoy, MD, Speaker Role: review of content by : G. Takei, PharmD
Leah Nimoy, MD	Activity Director	N/A	N/A	N/A
Gavin Takei, PharmD	Content reviewer	N/A	N/A	N/A
Donna Kelley, MSN, ACRN	Speaker	PhaserBiotech	Consultant	Review of content by G. Takei, PharmD
Bonnie Spiner, DO, MPH	Speaker	Riker Healthcare	Principal Investigator Company Sponsored Research	Review of content by G. Takei, PharmD

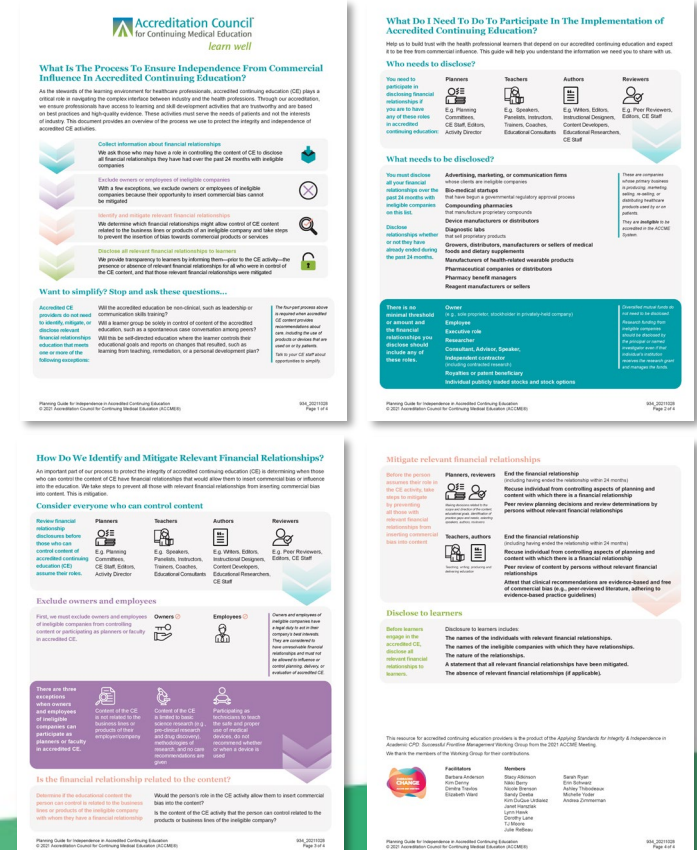


NEW STANDARDS RESOURCES

Planning Guide for Independence in Accredited Continuing Education

Electronic (PDF) document and companion Microsoft PowerPoint slide presentation that accredited providers can use with **planners and faculty** to explain the process for collecting, mitigating, and disclosing relevant financial relationships.

Available now at <http://www.accme.org/standards-resources>



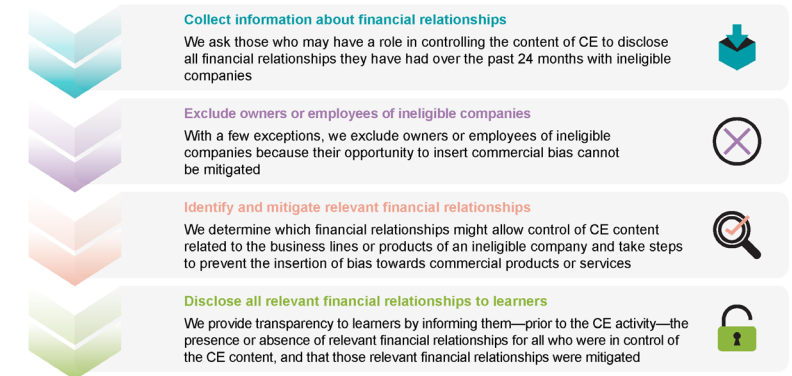
NEW STANDARDS RESOURCES

Planning Guide (cont.)

Overview of how CE providers use the Standards to ensure independence in accredited education.

What Is The Process To Ensure Independence From Commercial Influence In Accredited Continuing Education?

As the stewards of the learning environment for healthcare professionals, accredited continuing education (CE) plays a critical role in navigating the complex interface between industry and the health professions. Through our accreditation, we ensure professionals have access to learning and skill development activities that are trustworthy and are based on best practices and high-quality evidence. These activities must serve the needs of patients and not the interests of industry. This document provides an overview of the process we use to protect the integrity and independence of accredited CE activities.



Want to simplify? Stop and ask these questions...

- | | | |
|---|---|--|
| <p>Accredited CE providers do not need to identify, mitigate, or disclose relevant financial relationships education that meets one or more of the following exceptions:</p> | <ul style="list-style-type: none"> Will the accredited education be non-clinical, such as leadership or communication skills training? Will a learner group be solely in control of content of the accredited education, such as a spontaneous case conversation among peers? Will this be self-directed education where the learner controls their educational goals and reports on changes that resulted, such as learning from teaching, remediation, or a personal development plan? | <p><i>The four-part process above is required when accredited CE content provides recommendations about care, including the use of products or devices that are used on or by patients. Talk to your CE staff about opportunities to simplify.</i></p> |
|---|---|--|

Available now at <http://www.accme.org/standards-resources>



NEW STANDARDS RESOURCES

Planning Guide (cont.)

Helpful, non-technical explanations of what is required from those who wish to participate as planners, teachers, and reviewers in accredited CE.

Who needs to disclose?

You need to participate in disclosing financial relationships if you are to have any of these roles in accredited continuing education:

Planners



E.g. Planning Committees, CE Staff, Editors, Activity Director

Teachers



E.g. Speakers, Panelists, Instructors, Trainers, Coaches, Educational Consultants

Authors



E.g. Writers, Editors, Instructional Designers, Content Developers, Educational Researchers, CE Staff

Reviewers



E.g. Peer Reviewers, Editors, CE Staff

What needs to be disclosed?

You must disclose all your financial relationships over the past 24 months with ineligible companies on this list.

Disclose relationships whether or not they have already ended during the past 24 months.

Advertising, marketing, or communication firms
whose clients are ineligible companies

Bio-medical startups
that have begun a governmental regulatory approval process

Compounding pharmacies
that manufacture proprietary compounds

Device manufacturers or distributors

Diagnostic labs
that sell proprietary products

Growers, distributors, manufacturers or sellers of medical foods and dietary supplements

Manufacturers of health-related wearable products

Pharmaceutical companies or distributors

Pharmacy benefit managers

Reagent manufacturers or sellers

These are companies whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

*They are **ineligible** to be accredited in the ACCME System.*

Available now at <http://www.accme.org/standards-resources>

NEW STANDARDS RESOURCES

Planning Guide (cont.)

Explains how mitigation of relevant financial relationships occurs using the Standards.

Mitigate relevant financial relationships

Before the person assumes their role in the CE activity, take steps to mitigate by preventing all those with relevant financial relationships from inserting commercial bias into content

Planners, reviewers



Making decisions related to the scope and direction of the content, educational goals, identification of practice gaps and needs, selecting speakers, authors, reviewers

Teachers, authors



Teaching, writing, producing and delivering education

End the financial relationship

(including having ended the relationship within 24 months)

Recuse individual from controlling aspects of planning and content with which there is a financial relationship

Peer review planning decisions and review determinations by persons without relevant financial relationships

End the financial relationship

(including having ended the relationship within 24 months)

Recuse individual from controlling aspects of planning and content with which there is a financial relationship

Peer review of content by persons without relevant financial relationships


Attest that clinical recommendations are evidence-based and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines)

Available now at <http://www.accme.org/standards-resources>

NEW STANDARDS RESOURCES

Case Scenarios: When It Is Acceptable to Use Owners and Employees of Ineligible Companies in Accredited Continuing Education

- Document with multiple case vignettes
- Microsoft PowerPoint slides
- Online quiz

A large version of the ACCME logo, consisting of a blue and green gradient background with a white mountain peak shape on the right side.

Quiz: Case Scenarios: When It Is Acceptable to Use Owners and Employees of Ineligible Companies in Accredited Continuing Education

Explore a series of case vignettes that provide examples of scenarios when the exceptions in Standard 3.2 of the Standards for Integrity and Independence do and do not allow owners and employees of ineligible companies to participate as planners/faculty in accredited continuing education (CE). You can download a document or Microsoft PowerPoint version of this quiz at <http://www.accme.org/standards-resources>. If you have questions about the Standards, please contact your continuing education accreditor or contact ACCME at info@accme.org.

Click NEXT to begin!

Available now at <http://www.accme.org/standards-resources>

USING CASES TO THINK THROUGH MITIGATION OF RELEVANT FINANCIAL RELATIONSHIPS

Case 1: Standard 3 – Abstract Reviewer

A dermatologist has been assigned to review and grade scientific abstracts for an upcoming annual meeting at which selected abstracts will be presented as part of the accredited CME. He is a compensated researcher for a company that has products in many areas of dermatology, which will likely be related to the abstract content.

How can this relationship be mitigated?

Mitigation approaches –for planners

Planners, reviewers



Making decisions related to the scope and direction of the content, educational goals, identification of practice gaps and needs, selecting speakers, authors, reviewers

End the financial relationship

(including having ended the relationship within 24 months).

Recuse individual from controlling aspects of planning and content with which there is a financial relationship.

Peer review planning decisions and review determinations by persons without relevant financial relationships.

Case 2: Standard 3 – Speakers' Bureau

A plastic surgeon has disclosed that she serves on a speakers' bureau for the manufacturer of an acne drug. She is facilitating a meet-the-professor discussion on challenging cases in managing scar revision for acne vulgaris.

What process, if any, is necessary to ensure that her discussions are balanced and evidence-based?

Mitigation approaches – for faculty

Teachers, authors



Teaching, writing, producing and delivering education

End the financial relationship

(including having ended the relationship within 24 months).

Recuse individual from controlling aspects of planning and content with which there is a financial relationship.

Peer review of content by persons without relevant financial relationships.

Attest that clinical recommendations are evidence-based and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines).

Case 3: Standard 3- Patent holder

An orthopedic surgeon has obtained a patent for a new type of pedicle screw. She is receiving royalties from a device company that is commercializing the product.

Is she able to participate as a speaker in a CME activity presenting on spinal surgery, and if so, what are some steps that would mitigate this relationship?

Financial Relationships

Planners/Faculty	Disclosed and Mitigated	Excluded from CME
... has patents that result in royalties	X	
... consults for a biomedical startup or industry	X	
... is employed by a biomedical startup with no products yet	X	
... has stock or stock options in a medical company	X	
... is <u>employed</u> by or <u>owns</u> a biomedical enterprise AND has initiated approval at FDA or similar AND CME content is related to product(s) or business lines		X

The three exceptions for owners/employees...

Owners and employees of ineligible companies (such as pharma or a startup) can participate as presenters and planners in CME if...

the content of the activity is not related to the business lines or products of their employer/company.

the content of the accredited activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.

if they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used.

Case 4: When the relationship is ownership

Dr. Potash is presenting on a new smoking cessation product, which she invented, that recently received FDA approval. She also owns the company that will be marketing the product. This medication is given using an implantable dispensing device. She will discuss different approaches to smoking cessation (without mentioning her product) and demonstrate the safe and proper implantation of the device on a volunteer.

Can she present in this accredited activity?

Answer – When the relationship is ownership

Dr. Potash is presenting on a new smoking cessation product, which she invented, that recently received FDA approval. She also owns the company that will be marketing the product. This medication is given using an implantable dispensing device. She will discuss different approaches to smoking cessation (without mentioning her product) and demonstrate the safe and proper implantation of the device on a volunteer.

No, this scenario does not meet the exception.

Rationale: The presenter is going beyond teaching the safe and proper use of the device to include information about ways to help patients stop smoking cessation. This could create a reasonable opportunity to market smoking cessation products (including hers) to the learners.

Case 5: An employee as a presenter

Dr. Jones is an employee of a company that produces and markets vaccines. She has been asked to speak on the logistics of supply chains as she previously worked for a company that pioneered global supply chains for vaccines requiring extremely low temperature storage.

Answer - An employee as a presenter

Dr. Jones is an employee of a company that produces and markets vaccines. She has been asked to speak on the logistics of supply chains as she previously worked for a company that pioneered global supply chains for vaccines requiring extremely low temperature storage.

Yes, this scenario meets the first exception: not related.

Rationale: The logistics of supply chains (even if those are used for vaccines) is sufficiently separated from the clinical use of vaccines to make it unlikely the speaker would introduce bias about her company's vaccines.

QUESTION & ANSWER

Q&A

Q: When do we need to implement the 30-minute separation between accredited continuing education and another activity?

Q&A

Q: When do we need to implement the 30-minute separation between accredited continuing education and another activity?

A: Implement separation if next activity is in the same space AND

- a) is controlled by ineligible company OR*
- b) includes any clinical education (non accredited) OR*
- c) contains any marketing/promotion*

Q&A

Q: Why would we ask “...has the relationship ended” on our disclosure form and how should we manage responses?

Q: Are we to use the term “relevant” financial relationship per the new standards?

Q&A

Q: Why would we ask “...has the relationship ended” on our disclosure form and how should we manage responses?

A: If the financial relationship is relevant and it has ended, then no other mitigation steps are necessary. That relevant relationship must still be disclosed to learners.

Q: Are we to use the term “relevant” financial relationship per the new standards?

A: The Standards have replaced the term “conflict of interest” with “relevant financial relationship” because of the negative connotation that some planners/faculty have with the concept of COI...it is up to you to decide what terminology you want to use.

Q&A

Q: Please confirm that once a relationship has been mitigated, the mitigation strategy does not have to be shared with learners.

Q&A

Q: Please confirm that once a relationship has been mitigated, the mitigation strategy does not have to be shared with learners.

A: The mitigation strategy does not need to be shared, but Standard 3 does require the provider to inform the learners that relevant financial relationships have been mitigated.

Other Questions?



THANK YOU!

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Contact us: info@accme.org