

Continuing Medical Education

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COLLEGE
OF MEDICINE

Records Retention Policy

Policy

- All CME Office Records will be maintained and stored in accordance with Accreditation Council for Continuing Medical Education (ACCME), American Medical Association (AMA), and University of Arizona requirements.

Explanation and Clarification

- The CME Office calendar is based on the University's fiscal year calendar.
- Per ACCME requirements, the CME Office will retain activity files/records of CME activity planning and presentation during the current accreditation term or for the last 12 months, whichever is longer.
- Per ACCME and AMA requirements, the CME Office will record and, when authorized by the participating physician, verify participation for 6 years from the date of the CME activity. This requirement may be met by the use of electronic data storage. The ACCME and AMA do not require the use of manual sign-in sheets.
- The CME Office will retain additional participant information on regularly scheduled series (RSS) so that information on a learner's participation can be retrieved by the learner. The information that will be available includes: learner identifier, name/topic of activity, date of activity, and hours of credit designated or actually claimed. This information will be stored electronically and will be retained for 6 years from the date of the CME activity.
- When activity records or participant records have exceeded the required retention durations, the University of Arizona Records Management and Archives Department shall be notified before the records are destroyed.
- CME Office financial records are maintained by the College of Medicine Administration. The CME Office may retain copies of invoices, receipts, purchase orders, and other financial documents for tracking purposes. These copies shall be destroyed no later than 12 months after they are closed out.
- All other CME Office documents and records will be retained per the University of Arizona Common Records Retention and Disposition Schedule: <http://records.web.arizona.edu>.