

Continuing Medical Education

PO Box 245121 | Tucson, AZ, 85724-5121

Tel: (520) 626-7832 | FAX: (520) 626-2427

uofacme@email.arizona.edu | www.cme.arizona.edu



COLLEGE
OF MEDICINE

Regularly Scheduled Series Planning Guide

The ACCME defines a regularly scheduled series (RSS) as an activity that is planned as a series with multiple, ongoing sessions (e.g., sessions that are offered weekly, monthly, or quarterly), and that is primarily planned by and presented to the accredited organization's professional staff. Examples include grand rounds, tumor boards, and morbidity and mortality conferences. The UA CME office must make available and accessible to the learners a system through which data and information on a learner's participation can be recorded and retrieved. Meaning, upon request, we must be able to provide your physicians with a CME transcript of their attendance at UA-sponsored RSS events. Therefore, activities that are not regularly scheduled to occur at least once per quarter will not be approved as RSS activities. Similarly, if the majority of attendees at your event are not members of your professional staff, your event may not be approved as an RSS activity.

Assuming that your live event has been approved as an RSS, you then need to plan your schedule of events for the coming year. In order to assure that the CME Office can authorize *AMA PRA Category 1 CME Credit™* for your attendees, what else must happen?

1. We must approve *in advance of distribution* all instances where you discuss CME credit or the University of Arizona.
2. As the Activity Planner, you must assure that there is no possibility for commercial bias in your program.
3. You must communicate the program's goals to your speakers and your audience.
4. You must provide us with information on your speakers and, if requested, copies of presentations, handouts, and other activity materials.
5. You must communicate information on conflicts of interest and how they were managed to your audience.
6. You must document the amount of CME credit claimed for each participant and send these records to us.
7. After the activity, you will distribute CME certificates or work with us to provide certificates. All certificates must have the appropriate accreditation and sponsorship language.
8. You must evaluate the activity's educational effectiveness and share the results with us.

Click the links for more information.

[What can/must I say in my announcements, flyers, and handouts?](#)

[How should I detect and manage commercial bias?](#)

[What must I tell my speakers and my audience?](#)

[What do I need to send to you before the series begins?](#)

[What do I need to send you once the series has started?](#)

[How do I document CME credit and what records do you need?](#)

[How do my participants get their CME transcripts?](#)

[What kind of evaluation do you require?](#)

Announcement, Flyers, Brochures, and Handouts

You can announce and describe your series in any way you wish, as long as you do not mention *AMA PRA Category 1 CME Credit™* or the University of Arizona®. However, if you wish to mention CME credit, *you must have received approval*. You cannot say “credit pending,” “credit applied for,” or anything similar.

In the case of general “Save the Date” announcements, which describe only topic, date, and location, you can say that *AMA PRA Category 1 CME Credit™* sponsored by the University of Arizona College of Medicine at the Arizona Health Sciences Center is available. For longer announcements, Website registration pages, or any other information associated with the activity that describes the content, agenda, goals, etc., you *have* to include the following wording:

Directly Sponsored Regularly Scheduled Series (College of Medicine Department or Center)

The University of Arizona College of Medicine - Tucson is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

The University of Arizona College of Medicine - Tucson designates this live activity for a maximum of ___ *AMA PRA Category 1 Credit(s)™*. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

Jointly Provided Regularly Scheduled Series (External to the College of Medicine)

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education through the joint providership of The University of Arizona College of Medicine - Tucson and (*name of your organization*). The University of Arizona College of Medicine - Tucson is accredited by the ACCME to provide continuing medical education for physicians.

The University of Arizona College of Medicine - Tucson designates this live activity for a maximum of ___ *AMA PRA Category 1 Credit(s)™*. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

You may use the University’s logo on CME certificates that we approve, but you may not otherwise use our logo unless your CME program is a directly sponsored activity. If you do use the logo, you must comply with [University of Arizona trademark requirements](#). Please do NOT use the University’s logo or other branded material in any way without authorization.

The brand, *AMA PRA Category 1 CME Credit™* is owned by the AMA and the AMA has requirements about its use. The phrase should always be trademarked, italicized, and used in its entirety. The phrase “Category 1 Credit” must never be used when referring to *AMA PRA Category 1 Credit™*.

Before your series, you must communicate the purpose or objectives of the series to your faculty and your learners. For a regularly scheduled series, there should be an overall set of objectives and, almost certainly, separate sub-objectives for each event or meeting. We ask that all participants be aware of

the overall objectives and that those persons (faculty and learners) who participate in a specific event also be advised of that event's specific objectives. The best way to do this is:

1. Send written information about the overall needs and learning objectives to your faculty and ask them to develop specific objectives for their participation. *Send one copy of your correspondence to us.*
2. Include your overall learning objectives in your series announcements and promotions. *Send copies of these to us.*
3. Present your event-specific objectives to your learners as a slide or handout at the event. *Send us copies of these disclosures.*

You also must comply with the Americans with Disabilities Act (ADA) if you are using a "place of public accommodation." We suggest the following wording in your information materials:

Persons with a disability may request a reasonable accommodation, such as sign language interpreter, by contacting (*name, number, and Email - if possible*). Requests should be made as early as possible to allow time to arrange the accommodation.

Detecting and Managing Commercial Bias

Before your proposal was approved, you should have sent us conflict of interest disclosures on all Planning Committee members. If there were any conflicts, these should have been addressed before approval. After approval, we look to you to detect and manage conflicts. There are two principal ways that commercial bias can influence an educational activity:

1. Persons in a position to influence the educational program can manipulate the program for the benefit of a commercial interest.
2. Commercial interests can directly or indirectly market their products to learners as part of an educational activity.

We expect you to avoid both of these possibilities and, when appropriate, document the steps you have taken to do so. For detailed guidance on detecting and managing commercial bias, please see our policies on Conflict of Interest and Commercial Support.

At a minimum, we require that you send us signed (or digital equivalent) conflict of interest statements for all faculty members and letters of agreement or grants between the University of Arizona and all commercial supporters. We must be a party to all grants for commercial support. We also require copies of all agreements with commercial exhibitors, although we do not always need to sign these agreements. Please see our **Commercial Support Policy** if you have questions about the management of commercial support.

You only need to send faculty disclosures once a year (for faculty members who make multiple presentations) unless you become aware of new conflicts. This could occur if a faculty member's commercial relationship was not relevant to one presentation, but is relevant to another.

Required Information for Speakers and Audience

As noted previously, you must communicate the purpose or objectives of the activity to your faculty and your learners. We need evidence that this has occurred. The best way to do this is:

1. Send written information about the overall needs and learning objectives to your faculty and ask them to develop specific objectives for their participation. *Send one copy of your correspondence to us.*
2. Include your overall learning objectives in your series announcements and promotions. *Send copies of these to us.*
3. Present your event-specific objectives to your learners as a slide or handout at the event. *Send us copies of these disclosures.*

During the series you must also present all disclosure information for the Planning Committee, the faculty, and the College of Medicine (the CME Provider). You must also disclose to the learners how you resolved any conflicts (e.g., persons with conflicts of interest were removed from the program, or Dr. X disclosed a conflict of interest and her presentation was reviewed by Dr. Y to confirm that all recommendations were based on published studies). Please do this at each event. You can do this via a slide as part of an oral presentation or a written handout, but we need evidence that this occurred. You must either send us a copy of the relevant disclosure slides, a signed attestation that specific disclosures were made, or (better) a copy of a meeting agenda, brochure, or syllabus listing the relevant disclosures. (To read more about identifying and managing conflicts, and to view examples of disclosure statements, please see our **Conflict of Interest Policy**.)

What to Send Us before the Series Begins

Here is your checklist of what we will need from you before the series begins:

1. An approved CME Proposal, including proposed budget, agenda, and Planning Committee disclosures.
2. All materials that mention CME credit or the University of Arizona.
3. Sample faculty invitations.
4. An explanation of how you resolved any Planning Committee conflicts of interest, if this occurred.
5. Evidence that your needs assessment, practice gap, and learning objective statements will be communicated to the audience.
6. A copy of your evaluation form or description of how you will measure the educational effectiveness of your series.
7. All agreements with commercial interests that are providing support for the series. Please see our **Commercial Support Policy** for further information on what is required if your series has commercial support.

What to Send Us During the Course of the Series

Once your series begins, you will add speakers, learners, and, possibly, commercial support. We will need the following materials on a quarterly basis:

1. Schedule and brief description of each event.
2. Biographical information on each presenter.
3. Disclosure forms for each presenter and documentation of how any conflicts of interest were resolved.

4. Evidence that your needs assessment, practice gap, and learning objective statements were communicated to the audience.
5. Documentation of all individuals requesting CME credit (see below) and numbers of event attendees.
6. Information on commercial support that has not been previously sent.

Documenting CME Credit

You must have a mechanism for physicians to claim credit and you must award the actual number of *AMA PRA Category 1 Credits™* claimed by each physician. If you have any question about this requirement, consult the American Medical Association's [Physician's Recognition Award booklet](#).

Many series organizers use a handwritten sign-in sheet for physicians to document and claim CME credit. Please send these to our office regularly, but no less often than quarterly. In the near future we expect to revise this process to allow for electronic submission of series attendance.

Note that only physicians (MDs, DOs and those with equivalent medical degrees from another country) may be awarded *AMA PRA Category 1 Credit™* by accredited CME providers. If non-physician participants request a certificate, one can be issued, but the wording is not the same as a physician's certificate. This is explained in the [Physician's Recognition Award booklet](#).

For regularly scheduled series, we will maintain a database of individuals who have been awarded CME credit or a certificate. We will also record the numbers of physicians and non-physicians who participated in your series.

Distributing CME Transcripts to Participants

We do not issue CME certificates to physicians who participate in regularly scheduled series. Instead we maintain a database of participants from which we create transcripts on demand. Currently, there is no fee for producing and mailing a transcript. To obtain a transcript of attendance at a regularly scheduled series, with evidence of CME credit awarded, a physician should send an e-mail to uofacme@email.arizona.edu or contact our office.

Evaluating Your Series

We expect you to measure the outcomes of your regularly scheduled series. We also expect you to share this information with us and to use it in planning future activities. You may want to know if learners were happy with the overall program and the facilities, but we will also expect you to determine:

- Whether there were perceptions of bias or commercial influence in the series.
- Whether the learning objectives were met.
- The extent to which the practice gaps you identified were closed.

We do not require that you use certain measurement tools, but we do expect that you will share your tools with us and report the results of your evaluation. Please see our **CME Evaluation Guide** and **Sample CME Activity Evaluation Form** for more discussion.

After the series has concluded, usually at the end of the approval year, please send us:

- A summary of your educational evaluation.
- Documentation of how disclosures were given to learners.
- A reconciliation of commercial support.
- Any other required documents that have not been sent previously, such as Letters of Agreement from supporters.