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Commercial Support in Today's CME: Documentation is Key

by Lea A. Mabry, MEd

The use of funds from commercial interests to underwrite CME expenses is a long-standing practice. Today this practice is subject to close scrutiny by the ACCME and the health care community. Therefore, documentation of **all** funds or in-kind support received from commercial supporters is a vital key to successful compliance with the ACCME Standards for Commercial Support and continued CME credit approval.

What defines a commercial interest? According to the ACCME, it is "any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients." The ACCME does not consider providers of clinical service directly to patients as commercial interests. These include: 501-C Non-profit organizations (*Note: ACCME screens 501c organizations for eligibility. Those that advocate for 'commercial interests' as a 501c organization are not eligible for accreditation in the ACCME system. They cannot serve in the role of joint sponsor, but they can be a commercial supporter.*); Government organizations; Non-health care related companies; Liability insurance providers; Health insurance providers; Group medical practices; For-profit hospitals; For profit rehabilitation centers; For-profit nursing homes.

Can commercial supporters specify how to spend the funds? No, the funds must be unrestricted. The commercial supporter cannot dictate what expenses will be paid from the funds. A commercial supporter cannot directly pay any CME event related expenses. All funds must be received by the CME provider of the event and **all** expenses are paid by the provider.

What kind of documentation of commercial support is expected? The ACCME expects to be able to review income and expense statements for all CME activities. You will need to submit the following documentation to the OCME:

- A budget that reflects:
 - *Significant sources of income:* Including income from commercial support, advertising and exhibit fees, tuition and registration fees, internal budget allocations and any other source that represents greater than 20% of total income.
 - *Significant expenses:* Including staff salaries, meeting costs, honoraria, faculty travel expenses and any other item that represents greater than 20% of total expense.
- Signed and dated Letters of Agreement and copies of checks for **all** educational grants.
- List of all exhibitors and fees paid. This should match what is listed in the budget.

Careful record keeping of all income and expenses is **the key** to providing compliant documentation and successfully meeting all the responsibilities of receiving commercial support.

10, 9, 81!!! Happy New Year! Its official, the hustle and bustle of the Holiday season has ended. Although I will miss the glistening lights, longer shopping hours, the joy of being with family and friends, and the platters of cookies, fudge, and every other sweet delicacy that are ever so popular during the holiday season, I am looking forward to a new year. I only have one goal this year and that is to Shine in 2009!

Reflecting on 2008, I want to thank everyone for a great year. There has been much improvement in the world of RSSs (Regularly Scheduled Series). As I am finishing up my first round of audits for this academic year (2008-2009), I have noticed a couple of things that still need attention.

1) Disclosure: For compliance with ACCME criteria, disclosure to the participants, prior to the educational activity, has to be made regardless if there is a financial relationship to disclose or not. This can be done verbally, by a slide, or a sign posted where everyone can see. If you haven't checked out the disclosure template on our website, please do so. It is entitled "How to Disclose: A PowerPoint with Slide Templates for Proper Disclosure Method."

2) Timeliness: The CME office is required to monitor compliance of ACCME criteria. Your closing reports are a major component of the monitoring system, therefore they must be submitted in a timely matter. This includes a session report, announcement, disclosure form(s) and method of disclosure, attestation of disclosure and sign-in sheets. Due dates are:

If your conference(s) is/are weekly or bi-weekly, then your closing reports are due within two weeks following the date held.

The due date for monthly or quarterly conferences is within one month of the date held.

If you are interested in having your regularly scheduled series accredited, it's not too late. The academic year doesn't end until June 30th so call ASAP for details and pro-rated fees.

Moving forward in 2009, we have a fresh start with new ideas and innovations to better serve you. If you have any comments or suggestions on how I can be of better service to you, please feel free to contact me at LLRatliff@uams.edu.

Together as a team, we will Shine in 2009!

Lindsay Ratliff, MBA

in the
spotlight:

LISA BLAIR

by Lindsay Ratliff, MBA



Lisa is in the spotlight this quarter because she continually does an outstanding job! Lisa has been with UAMS for 11 years, and has been doing CME for about 10 of it. She does CME work for both the Regularly Scheduled Series (RSS) and formal conferences that her department provides. With all of this in addition to her day-to-day work, she stays busy, but continues to rise above. Thank you Lisa,

you are greatly appreciated!

Which department do you work for?

Otolaryngology Head and Neck Surgery

What do you like best about the work you do to support the CME both for formal conferences as well as the RSSs?

There are two things. First, I am learning that there are so many wonderful medical treatments and ongoing research for diseases of the head and neck. Second, I witness the growth of young physicians into medical care providers.

What advice do you have for planning successful CME events?

Be proactive and don't wait until the last minute to plan.... which is hard to do when you have other responsibilities. Try to stay on top of the CME rules and regulations. Have all your faculty sign their disclosure forms to be turned in with your CME application. If you have multiple CME applications, have the faculty sign one disclosure to cover all CME events. This way the faculty does not become frustrated with signing multiple disclosure forms.

What is the most surprising thing that has happened or that you have observed in the course of your CME work?

The whole learning experience with CME can be surprising and challenging. The UAMS CME office is always willing to help out when you need help getting through the challenges of re-applying for CME.

What is one (or more) interesting facts about you?

I love to write and have written many children's stories.

HATS
OFF
TO
YOU!!



by Alicia Edmiaston

As many of you know, this is a reaccreditation year for the OCME. I'm happy to report that our self-study has been completed and submitted, along with all the documentation to the ACCME office in Chicago!

I would like to take this opportunity to thank each and every one of you for the fantastic job you do daily in helping this office achieve its mission. A special thanks to everyone who responded, so positively and quickly, to requests for additional documentation during the self-study process. It is due to all of you working so hard, maintaining good records and making sure your activities adhere to the Essential Areas and Criteria of the ACCME guidelines that insure our continued accreditation. This is truly a team effort!

Thank you again! Keep up the good work getting those signed letters of agreement for commercial support, performing disclosure properly, documenting needs assessments and all of the other documentation and details necessary for successful and compliant CME events.

COMING SOON

Planning and Documenting ACCME Compliant CME Activities Workshop

Several dates will be available but space will be limited. Watch for further announcements in the near future!

**TRANSCRIPTS OF CME CREDIT
NOW AVAILABLE BY EMAIL!**

To request a transcript, contact the OCME by e-mail to LAMabry@uams.edu or phone 661-7962.

An Interview with **KAREN FLEMING** Continuing Medical Education for the College of Medicine

by Lea Mabry, MEd

Karen is a valued, versatile member of the OCME. In April, she will have been with the OCME for twelve years. This longevity has made her our "go to" person whose knowledge is both wide and deep of all things CME!

Her technical and creative skills combine to produce stunning brochures, signage, and this newsletter. She keeps our software program, CME Web Tracker, humming along keeping track of credits, registration, and events. She also was instrumental in working with IT to get the badge swipe system up, running, and interfacing with the Tracker program. She is currently working on getting online transcripts available...look for it to be available in the months ahead. Way to go, Karen!

What changes have you witnessed in your twelve years in CME?

The biggest changes are based in the new ACCME requirements for outcomes-based systems, incorporating more educational design, and the more stringent rules for commercial support.

What is the most challenging part of your job?

Keeping Tracker updated, tested, and running properly is quite challenging.

What is the most enjoyable part of your job?

It is always fun when the opportunity comes to do creative graphic design work. During managed conferences, seeing the hard work come to fruition and interacting with participants is very satisfying.

What do you like to do when you are away from the office?

I enjoy landscaping and working in the yard.

Is there anything else you would like to add?

The OCME is a great place to work. This a wonderful group of women to work with. Almost daily I am grateful and always appreciative of what each one contributes.



UPCOMING EVENTS

FEBRUARY

- 06-07 The Heart Summit 2009
The Peabody Hotel
- 20-21 Geriatric Medicine Update: Cardiovascular Disease in Older Adults
The Crown Plaza Hotel, Little Rock, AR
- 28 - Mar 6 AACH Winter Course 2009: Living in & Adapting to Challenging Environments
Franciscan Renewal Center, Scottsdale, AZ

MARCH

- 13 Community Based Participatory Research Wkshop
UAMS Stephens Neurosciences Institute
- 14 Ophthalmology Pearls for the Non-Ophthalmology Physician
UAMS Jones Eye Institute
- 20 12th Annual Rasco Symposium on Colorectal Cancer
UAMS Rockefeller Cancer Institute
- 26-28 Symposium on Critical Care & Emergency Medicine
Arlington Hotel and Resort Spa, Hot Springs, AR

APRIL

- 3 Conference On Children's Health & The Environment
UAMS Stephens Neurosciences Institute
- 15 Best Practices in the Continuum of Care
Embassy Suites Hotel, Little Rock, AR
- 18 Diabetes Update 2009
UAMS Wilson Lecture Hall
- 18 AR Radiological Society: Pediatric Injury Update 2009
UAMS Stephens Neurosciences Institute

Tips for Planning a Successful Conference: The Home Stretch

by Valerie Thomas

As your conference day approaches, like Santa Claus, you are making your list and checking it twice! To make sure everything is ready for the conference, do a walk through the day before at the reserved location. If your conference is at a hotel, schedule a pre-conference meeting to review details with the hotel staff.

Always contact your speakers to ensure they will arrive as scheduled and they have all the information that they need. Double check any arrangements you have made for the speakers. Have you made each one a name badge, arranged travel and transportation, lodging, and meals?

For each pre-registered participant, make sure they 1) are on the sign-in sheet, 2) have a name badge (if providing), 3) have a certificate prepared (if using certificates), and 4) have a syllabus or handout. Bring blank sign-in sheets, name badges, extra syllabi (handouts) and certificates for those who register on site. Create a conference supply kit that contains ink pens, markers, tape, scissors, extension cords, etc., to ensure that your conference runs smoothly.

The final days before a conference are very hectic, but you are in the home stretch. Remember, planning a conference is all about details. So as you check your list for the last time before conference day, make sure to take a deep breath, exhale, and most importantly, get a good night's rest.

Coming next quarter: It's Conference Day!

Remember! Whenever you need a CME form, please get a new one from <http://www.uams.edu/cme/coursedirectors/default.asp> to ensure you use the latest version.

Window to the Web

- UAMS CME <http://www.uams.edu/cme/default.asp>
- ACCME <http://www.accme.org/index.cfm>
- AMA <http://www.ama-assn.org/ama/pub/category/2922.html>
- AR Medical Board <http://www.armedicalboard.org/support/sub-downloads.asp#Rules>