SCHOOL OF MEDICINE
OFFICE FOR CONTINUOUS PROFESSIONAL LEARNING

Coordinator's CME Toolbox

Timeline:
The Timeline provided is for any new RSS Activities applying to CPL for the **first** time. **It is not a timeline for those activities who have been previously approved by CPL.**

Definitions of Roles:
Coordinator: The Administrative Staff person assigned to an activity from the sponsoring department.
Education Planning Faculty: The faculty member(s) assigned to an activity from the sponsoring department.
Education Planning Committee: Colleagues of the Education Planning Faculty who collaborate in the planning of an activity.

No.	Description	Timeline
1.	**Planning Meeting with CPL Associate Dean** All new Education Planning Faculty are required to meet with CPL Associate Dean to review the process. The Coordinator is encouraged to attend, as well. a. Determine Program Objectives b. Identify Professional Practice Gaps c. Review Education Planning Faculty Disclosure d. Format of Activity e. Any Commercial Interest f. Review Roles and Responsibilities g. Review the Accreditation Process and Timeline h. Review the Evaluation Process i. Make decision to move forward or not	Initial Discussion (6-9 months prior)
2.	**CME Application, 2 Parts** a. Application, Agenda and Sample Evaluation Tool This is a **two-part** process, so please see the instructions regarding the email with the yellow box. The application link is **here**. • The application can be minimized if you are working on other documents. If you close the form before it is submitted, your information is not saved. *Upload these documents:* • Current Agenda with date and beginning and ending times, Save the Date Flyer, etc. • Current Evaluation Form is saved in the Template and Forms section. There are three templates for you to choose from. • Submit the Application & watch for the email from ***Smartsheet***. It will include the Education Planning Form, Part II, which is completed by the Education Planning Faculty.	CME Application (3-6 months prior)

	b. Education Planning Form, Part II **SUBJECT LINE**: CME Application Received-Please Complete Educational Planning Form • Email will include your Provider Activity ID: (RSS-???) (IL-???) (C-???) • Look for the Yellow Box! **Click the link** to complete the Education Planning Form. • We have resources to assist you in completing this form, and we strongly encourage you to use our worksheet prior to starting this online form. Resources to complete this form can be found here. c. Disclosure Form for Education Planning Faculty The Education Planning Faculty to complete the Disclosure Form prior to program being approved.	
3.	**Application and Education Planning Form, Part I & II Worksheets (fillable PDFs)** The Application Form, Part I, asks for your basic contact information and generic information about the activity. A coordinator typically completes this short form. However, the Education Planning Form, Part II, must be completed by the Education Planning Faculty, and for several reasons, we highly suggest you use the worksheet to start the process. Smartsheet does not "Save as you Go", so using the worksheet/fillable PDF will allow you time to consider your responses and collaborate with others involved in the planning to complete this extensive form. We have **Tips & Examples** to guide and assist you in filling out the Education Planning Form. You can easily copy-and-paste your finalized worksheet responses into the Smartsheet Education Planning Form.	Worksheets (3-6 months prior)
4.	**CME Approval, QR Code, Sign-in Link and Upload Link** The CPL Office will review all materials and approve the activity if it meets ACCME's Criteria. An email will be sent to the Coordinator and Education Planning Faculty. At that time, our office will generate the other items needed for your activity. We will email you the Smartsheet links, as well as the QR Code for your attendee sign-in process. We will also provide you with a link to an Upload Form in Smartsheet, which the Coordinator will use to send CV's, Announcements, Evaluation Summaries and all other documentation to CPL. Approval process will not begin until all documentation is received.	Approval within 2-4 weeks based on office workload
5.	**Save the Date Postcard or E-Blast** Once your application is submitted and approved, a Save the Date postcard can be sent, if you desire. The CPL Office must **review** the final product prior to distribution.	7 months prior
6.	**Secure Speakers** (Department works with speakers) a. Collect Disclosures from each speaker at least 2 weeks prior to the activity. See the Disclosure Form information listed below for additional information about this process.	6 months prior

	b. CPL Requires CV's for any non-UNM Speakers. These are to be uploaded to our system. c. Honorarium and travel can be paid by the sponsoring department, except when there are grant or exhibitor funds being paid to the activity. d. Speaker objectives are to be added to the Learning & Feedback Form (evaluation) if you are using the Retrospective Pre/Post Objectives version of the Learning & Feedback Form.	
7.	**Commercial Interests Grants** The CPL Office must be included in **any** grant applications for commercial support. We must sign as the Accredited Provider, and the sponsoring department will sign as the Education Planning Faculty. These funds can be sent directly to your department. Speakers cannot be paid directly when grant or exhibitor funds are paid to an accredited activity. If you have any questions, please see ACCME's Standards for Integrity and Independence in Accredited Continuing Education or contact our office. An Acknowledgement must be included on each activity's announcement if any funds are received from commercial support. No corporate or organizational logos can be used on this page. We simply list the name of the company or organization in a generic font.	5 months prior
8.	**Commercial Promotion (Exhibitors)** Many departments invite pharmaceutical companies to exhibit at the activity. Our office has a standard Letter of Agreement that we can share with you. We use it as a contract to ensure the company is signed up, even if payment may be received after the activity. These funds can be sent directly to your department. An Acknowledgement must be included on each activity's announcement if any funds are received from commercial support. No corporate or organizational logos can be used on this page. We simply list the name of the company or organization in a generic font.	4 months prior
9.	**CME Disclosure Form** Each activity will have a unique link to a Disclosure Form, which will allow the Coordinator access to this sheet. ACCME requires CME providers to ensure that those in control of content disclose to the provider all relevant financial relationships. a. Planners must complete the online Disclosure Format at the time of submission of your Application and Education Planning Forms. b. Speakers and Committee Members are required to complete the online Disclosure Form. c. Moderators/Facilitators: Anyone who will be in front of the audience must complete the online Disclosure Form.	2 months prior

d. Any Conflicts of Interest?
In the past 24 months, I have had financial relationships with ineligible companies.

If any individual checks the box that indicates "I have had financial relationships…" on the Disclosure Form, there are additional steps that must be addressed.

i. 14-days prior to the CME activity: the faculty planner must contact the speaker and discuss with SPEAKER NAME, his/her involvement with COMPANY NAME. It is our understanding that they are a LIST ROLE for this company. Will they discuss COMPANY NAME and the work they do there? We specifically need to know if the educational content is related to the products of the company(ies) listed. If so, this could be a possible conflict of interest.

ii. 9-days prior to the CME activity: Email CPL the correspondence identifying the role COMPANY NAME or their products will play in SPEAKER NAME's presentation. If there is more than one company, list each company separately.
   a. Describe how there will/will not be any mention of these companies and/or their products in the slides/presentation.
   b. Describe if the content of the education is related to the products of the company(s) listed.

iii. CPL Staff will review your email and if there appears to be no conflict, and PLANNING FACULTY NAME agrees, then CPL Staff will add it to the file. If there appears to be a conflict, we will contact the CME Director, Eileen Barrett, MD, to discuss next steps. The likely outcomes are (a) the speaker needs to be recused, (b) CPL does a peer-review audit, or (c) no CME credit is provided for this activity.

iv. 7-days prior to the activity: CPL staff and the faculty planner must review the presentation slides. Add the presentation using your Upload Form and click the "urgent" checkbox. Both PLANNING FACULTY NAME and CPL Staff must review the slides to ensure there are no company logos, trademarks or product names, as well as agree that there is no conflict of interest. If there are any of the items mentioned above, we will contact the speaker regarding needed changes. If there are any identified conflicts, our CME Director, Eileen Barrett will be brought into discussion to help determine appropriate steps.

v. The day of the CME activity: your faculty planner completes an evaluation of the presentation, using CPL's Education Planning Faculty Evaluation Form. If you do not have a copy of this form, please let us know, and CPL Staff will email it to you.

vi. After the CME activity: Upload the completed Education Planning Faculty Evaluation Form using your Upload Form for this activity.

10.	**Brochure/Final Announcement** For larger activities, where a brochure is published, the CPL Office must **review** the final product prior to distribution. The accreditation statement must be added to the final brochure/final announcement. We will provide you with the current statement.	30 days prior
11.	**Tasks for 2 Weeks Out** a. Possible COI Speakers and Packet Information Speaker's Slide Presentation is reviewed by Education Planning Faculty and CPL. b. Update Announcement to be shared at registration desk or emailed Disclosure Statement and Acknowledgement of grant, if any. c. Prepare Learning & Feedback Form (evaluation) adding speaker objectives d. If there are any grants or exhibitors, this information must be listed on the announcement**.**	14 days prior
12	**Day of Activity** a. Registration Process Print and post QR Code at registration desk or on Zoom prior to start of activity. b. Possible COI If there are any speakers with a possible COI, the Education Planning Faculty attends the session and completes the Onsite Evaluation of Presentation Form. This form is then uploaded to Smartsheet, so it is part of the CME file for this activity.	Day of Activity
13.	**Update Coordinator Report in Smartsheet (Yellow Columns)** The Coordinator will be given access to a report, which shows the attendees for each session. This report has several columns, which are updated after each activity.	Within 24 Hours after Activity
14.	**Income and Expense Report to CPL (If grant or exhibitors)** If any funds are collected from Commercial Interests, an Income and Expense Report must be sent to CPL after the activity to show how those funds were used.	Within 30 Days of last activity
15.	**Outcome Summary Report** Completed by the Education Planning Faculty to provide an overall progress report on your activity to include a a) restate the gap(s) from your submitted form and provide evidence, of any type and to the extent possible, for the degree to which each gap was narrowed or closed and b) restate the change(s) in competence, performance, and/or outcomes that you stated in your application would be evaluated *and provide evidence* for the change(s). That evidence will most likely come from the methods you described in your CME application.	Annually, due in late February