

RSS 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 RSS Activities who have been previously approved by CPL.**

Definitions of Roles:

RSS Coordinator: The Administrative Staff person assigned to an RSS Activity from the sponsoring department.

Education Planning Faculty: The faculty member(s) assigned to an RSS Activity from the sponsoring department.

Education Planning Committee: Colleagues of the Education Planning Faculty who collaborate in the planning of an RSS Activity.

No.	Description	Timeline
1.	<p>Planning Meeting with CPL Associate Dean</p> <p>All new Education Planning Faculty are required to meet with CPL Associate Dean to review the process. The RSS Coordinator is encouraged to attend, as well.</p> <ol style="list-style-type: none"> 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 	<p>Initial Discussion (6-9 months prior)</p>
2.	<p>CME Application, 2 Parts</p> <ol style="list-style-type: none"> a. <u>Application, Agenda and Sample Evaluation Tool</u> <p>This is a two-part process, so please see the instructions regarding the email with the yellow box. The application link is here.</p> <ul style="list-style-type: none"> • 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. <p><u>Upload these documents:</u></p> <ul style="list-style-type: none"> • Current Agenda with date and beginning and ending times, Save the Date Flyer, etc. • Current Evaluation Form • Submit the Application & watch for the email from Smartsheet. It will include the Education Planning Form, which is completed by the Education Planning Faculty. 	<p>CME Application (3-6 months prior)</p>

	<p>b. <u>Education Planning Form, Planning Meeting Notes, Survey from Target Audience</u> SUBJECT LINE: CME Application Received-Please Complete Educational Planning Form</p> <ul style="list-style-type: none"> • Email will include your Meeting Code (RSS???) • 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 <u>strongly</u> encourage you to use our worksheet prior starting this online form. Resources to complete this form can be found here. • <u>Upload these documents</u>. • Planning Meeting Notes – Notes from your planning meeting(s) showing who attended, and why you determined this activity is warranted. • Surveys – did you survey your potential attendees to determine interest in the activity? If so, please upload the results from this survey too. <p>c. <u>Disclosure Form for Education Planning Faculty</u> Education Planning Faculty to complete the Disclosure Form prior to program being approved.</p>	
3.	<p>Application Form and Education Planning Form Worksheets</p> <p>The Application Form asks for your basic contact information and generic information about the activity. An RSS Coordinator typically completes this short form. However, the Education Planning Form must be completed by the Education Planning Faculty, and for several reasons, we highly suggest you use the worksheet to start the process.</p> <p>Smartsheet does not “Save as you Go”, so using the worksheet 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</p>	Worksheets (3-6 months prior)
4.	<p>CME Approval, QR Code, Sign-in Link and Upload Link</p> <p>The CPL Office will review all materials and approve the activity if it meets ACCME’s Criteria. An email will be sent to the RSS Coordinator and Education Planning Faculty. At that time, our office will generate the other items needed for your activity. We will email you the 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 RSS Coordinator will use to send CV’s, Evaluation Summaries and other documentation to CPL.</p> <p>Approval process will not begin until all documentation are received.</p>	Approval within 2-4 weeks based on office workload.
5.	<p>Save the Date Postcard or E-Blast</p> <p>Once your application is submitted and approved, a Save the Date Postcard can be sent, if you desire. The Office for CPL must review the final product prior to distribution.</p>	7 months prior

6.	<p>Secure Speakers (Department works with speakers)</p> <ol style="list-style-type: none"> <u>Collect Disclosures</u> from each speaker at least 2 weeks prior to the activity. See the Disclosure Form information listed below for additional information about this process. <u>CPL Requires CV's</u> for any non-UNM Speakers. These are to be uploaded to our system. <u>Honorarium and travel</u> can be paid by the sponsoring department, <u>except</u> when there are grant or exhibitor funds being paid to this RSS Activity. <u>Speaker objectives</u> are to be added to the Evaluation Form if you are evaluating each session. 	6 months prior
7.	<p>Commercial Interests Grants</p> <p>The Office for CPL 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 RSS Activity. If you have any questions, please see ACCME's Standard 3, or contact our office.</p> <p>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.</p>	5 months prior
8.	<p>Commercial Promotion (Exhibitors)</p> <p>Many departments invite pharmaceutical companies to exhibit at the event. 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 event. These funds can be sent directly to your department.</p> <p>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.</p>	4 months prior
9.	<p>CME Disclosure Form</p> <p>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.</p> <ol style="list-style-type: none"> <u>Planners and Planning Committee Members</u> must complete the online Disclosure Form the time of submission of your Application and Education Planning Forms <u>Speakers</u> are required to complete the online Disclosure Form prior to presenting. <u>Moderators/Facilitators</u>: Anyone who will be in front of the audience must complete the online Disclosure Form. <u>Any Conflicts of Interest?</u> If any of the above people select the "I or members of my family do have a financial arrangement related to the content of this activity" box on the Disclosure Form, then there are four steps that must be addressed. 	2 months prior

	<ul style="list-style-type: none"> i. Education Planning Faculty must contact individual and discuss the nature of the relationship the individual has with each commercial interest. ii. Upload your findings, using the Upload Form provided. If there is a speaker that does present a conflict, then we can discuss it and determine our next steps. This is not usually the case, but it is a possibility. iii. One week prior to their presentation, both the Education Planning Faculty and CPL Staff will both need to review their slides, to ensure there are no company logos, trademarks or product names. iv. Onsite, the Education Planning Faculty or a committee person will need to listen to the speaker(s) presentation and complete a short Course Director Evaluation. These forms will be returned to us via the Upload Form. 	
10.	<p>Brochure/Final Announcement For larger events, where a brochure is published the Office for CPL must review the final product prior to distribution.</p> <p>The accreditation statement must be added to the final brochure/final announcement. We will provide you with the current statement.</p>	30 days prior
11.	<p>Tasks for 1 Week Out</p> <ul style="list-style-type: none"> a. <u>Possible COI Speakers and Packet Information</u> Speaker’s Slide Presentation is reviewed by Course Director and CPL. b. <u>Update Announcement to be shared at registration desk</u> Disclosure Statement and Acknowledgement of Grant if any. c. <u>Prepare Evaluation adding Speaker Objectives</u> d. <u>If there are any grants or exhibitors, this information must be listed on the announcement.</u> 	7 days prior
12	<p>Day of Activity</p> <ul style="list-style-type: none"> a. <u>Registration Process</u> Print and post QR Code. Register speakers if they forget too. . b. <u>Possible COI</u> If there are any speakers with a possible COI, the Course Director attends the session and completes the Course Director Evaluation. This form is uploaded to Smartsheet, so it is part of the CME file for this activity. 	Day of Activity
13.	<p>Update RSS Coordinator Report in Smartsheet (Yellow Columns) The RSS 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.</p>	Within 24 Hours after Activity
14.	<p>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 event to show how those funds were used.</p>	Within 30 Days of last activity
15.	<ul style="list-style-type: none"> a. Outcome Summary Report b. Submit New Application for following Year 	Annually