

Regularly Scheduled Series (RSS) Handbook

(Grand Rounds, M&M, Lecture Series, Journal Club, etc.)



**UT Health San Antonio
Office of Continuing Medical Education**

**Mailing Address:
7703 Floyd Curl Drive, MSC 7980
Dental School Building, Room 3.050R
San Antonio, Texas 78229**

Website: <http://cme.uthscsa.edu>

**Melissa Craig
RSS Conference Coordinator
CraigM@uthscsa.edu
(210) 567-6531**

Table of Contents

Table of Contents.....	1
Introduction	2
Administrative Fees for FY22.....	4
Step-by-Step process for requesting <i>AMA PRA Category 1 Credit</i> [™]	5
Step 1 – Contact the UTHSA Office of CME	5
Step 2 – Complete the RSS Activity Application for CME	5
Step 3 – Submit Sample of Marketing Materials	6
Step 4 – Submit Planning Committee and Speaker Documentation	6
Step 5 – Submit Requests for Medical Ethics and/or Professional Responsibility/Pain Management Credit	7
Step 6 – Submit attendance documentation (electronic format).....	7
Step 7 – Submit Post Activity Documentation	8
Step 8 – Responsibilities	8
GLOSSARY OF CME TERMS	12

Introduction

Regularly Scheduled Series (RSS) are defined as recurring daily, weekly or monthly CME activities that are **primarily planned by** UTHSA Long School of Medicine Departments/Divisions and *Centers and **presented to** the accredited organization's own professional staff (same audience) and are designated for credit as one activity. Examples of activities that are planned and presented as a Regularly Scheduled Series are Grand Rounds, Tumor Boards, M&M Conferences, Lecture Series and Journal Club.

*Based on Activity Application for CME submitted, the Office of CME will determine if the activity qualifies as a Regularly Scheduled Series or other type activity.

The Office of Continuing Medical Education serves as the provider of CME credit for the **UT Health San Antonio Long School of Medicine (UTHSA SOM)**. The Office of CME plays a critical role in the planning, implementation and evaluation of all RSS.

UTHSA Long SOM Office of Continuing Medical Education has developed a process that monitors all regularly scheduled series ensuring compliance with the Accreditation Council for Continuing Medical Education (ACCME) Essential Areas and Elements, ACCME Standard for Commercial Support and UTHSCSA Policies. This system ensures that activities are:

1. Planned, implemented and evaluated based on real performance data
 - State the learner's performance gaps (for professional practice gaps that are identified in methods other than direct measurement of your professional staff – e.g., national trend data, state level data – explain how you connect these gaps to your own RSS attendees (learners)
 - State the needs you identify based on these gaps
 - Articulate the need in terms of knowledge, competence or performance
 - Incorporate the identified needs into the RSS (state specific topics that will address needs)
 - Describe how the content of your RSS is matched to your learner's current or potential scope of practice
 - Establish improvement measures
 - Describe changes in performance, competence, or patient outcomes that take place as a result of improvements derived from the RSS educational interventions
2. Each UTHSA Long SOM Department/Division or Center that organizes a RSS is expected to comply with Institutional and LSOM policies located on the Office of CME website and the following step-by-step processes as they relate to how the RSS will be planned, implemented and evaluated. UTHSA LSOM Departments and Center should consider the following when planning RSS activities:
 - A complete RSS Activity Application for CME must be submitted to the UTHSA Long SOM Office of CME no less than two months prior to the beginning of the RSS. Should grant funding be required, the RSS Activity Application for CME should be submitted five months prior to the beginning of the RSS. This allows time for review and follow up with the Department/Division/Center should there be any questions or additional information required by the Office of CME.

- There must be at least one individual from the Department/Division or Center who serves as the RSS Activity Coordinator for each RSS.
- The RSS Activity Coordinator participates in CME RSS training as required by the Office of CME. RSS Activity Coordinator also consistently adheres to the UTHSA Long SOM Office of Continuing Medical Education RSS Handbook guidelines.
- Each RSS series will be required to complete the annual evaluation provided by the Office of Continuing Medical Education.
- Per the AMA PRA/The Physician's Recognition Award (PRA) and credit system 2017 revision states:
 - **Credit certificates, transcripts or other documentation available to physicians**
 - 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.
 - **Credit certificates, transcripts or other documentation available to non-physician participants**
 - Non-physician health professionals and other participants may not be awarded *AMA PRA Category 1 Credit™*. However, accredited CME providers may choose to issue documentation of participation to non-physicians that states that the activity was certified for *AMA PRA Category 1 Credit™*.
- The Office of Continuing Medical Education documents and maintains all attendee records for a period of six years. The attendee record consists of:
 - Name/topic of activity/presentation
 - Date of activity
 - # of credits awarded
- Attendees may download/print a transcript of all CME credits/attendance for RSS for the past six years from date of activity/session via <http://cme.uthscsa.edu>.
- The Office of CME customers have access to their transcripts 24/7. Anyone who attends UTHSA CME-sponsored activities (grand rounds, tumor boards, M&M conferences, journal clubs, lecture series, live conferences, internet courses, etc.) has the ability to view and print their CME transcript.

- Instructions on how to access your transcript:
 - Go to: <http://cme.uthscsa.edu>
 - Scroll down and click on the button “**My CMEs**”
 - Scroll down and Click on **CME Transcript** button (on the menu to the left)
 - Click **Sign In to generate Transcript button**
 - Enter your **email address** (the one used to register).
 - Enter your **password**.
 - If you have an account but have forgotten your password, click on “**Forgot Password**” (a numeric code will be sent to your email)
 - Enter a Begin Date Range
 - Enter an End Date Range
 - Click on **Submit** button

- If you have any questions, please contact Melissa Craig via email at CraigM@uthscsa.edu or at 210.567.6531. I am here to assist you!

Administrative Fees for FY24

- 1-12 sessions / \$1,200.00
- 13-24 sessions / \$1,650.00
- 25-36 sessions / \$2,200.00
- 37-52 sessions / \$2,750.00

Other costs:

- Grants:
 - For all grant requests, a grants management fee of 10% of the face value of the grant will be charged.

- Enduring Material:
 - If you wish to offer recordings of your live activity for cme credit (considered enduring material and a separate activity), the fees are below:
 - 1-12 sessions / \$1,200.00
 - 13-24 sessions / \$1,650.00
 - 25-36 sessions / \$2,200.00
 - 37-52 sessions / \$2,750.00

Step-by-Step process for requesting *AMA PRA Category 1 Credit*[™]

Planning a quality Continuing Medical Education (CME) program is a thoughtful process which often begins a year or more prior to intended activity. The Accreditation Council for Continuing Medical Education (ACCME) requires that the UT Health Science Center San Antonio use planning processes that link identified educational needs with a desired result in its provision of all CME activities. To assist with this process the Director of the Office of Continuing Medical Education is available to meet with UTHSA Long SOM RSS Chairs to discuss how the Office of CME can be involved in the overall planning process for RSS.

We encourage Departments/Divisions/Centers to contact our office at as early as possible when considering a new series. The Office of CME does not provide retroactive *AMA PRA Category 1 Credit*[™].

Following is a step-by-step process to help guide you.

Step 1 – Contact the UTHSA Office of CME

The first step is to contact Melissa Craig, RSS Conference Coordinator with the Office of CME to inform us of your intent to plan an RSS and your desire to have this activity designated for *AMA PRA Category 1 Credit*[™]. At this time, you can inform us of the dates/times of planning meetings, your target audience, estimated # of attendees, the general description of your RSS, and provide an overview of how the educational need for this activity was identified.

- Email: CraigM@uthscsa.edu
- Phone: 210.567.6531

Step 2 – Complete the CME RSS Activity Application

Access and complete the RSS Activity Application for CME via <https://www.uthscsa.edu/academics/medicine/about/ocme/resources> and submit to Melissa Craig in the Office of CME via email to CraigM@uthscsa.edu. Upon receipt of your activity application, UTHSA Office of CME will review for approval. Completed activity application to include the following:

- Marketing material (flyer/brochure)
- Schedule of dates for your activity

Website resource to assist with completion of the RSS Activity Application for CME

- <https://www.accme.org/ceeducatorstoolkit>

After assessment by the Office of CME and determination that the RSS series is in full compliance with ACCME accreditation requirements and policies, the Office of CME will send a Service Agreement to the RSS Chair, RSS Activity Coordinator, and the department finance director/business administrator.

Director, Office of Continuing Medical Education
Letti Bresnahan
Bresnahan@uthscsa.edu
210.567.0299

Step 3 – Submit Sample of Marketing Materials

A sample of each type of marketing material used to market or announce your RSS series must be attached when submitting the RSS Activity Application for CME. Marketing materials include flyers, posters, websites and/or e-mails.

All marketing materials must be approved by Melissa Craig in advance of their circulation.

Step 4 – Submit Planning Committee and Speaker Documentation

- **Pre-activity.** Adhere to CME activity requirements as provided in the CME RSS Handbook
 - **PLEASE NOTE: Beginning FY21-22 Academic Year, financial disclosures will now be valid for a period of 2 years from date of completion**
 - Ensure planners/speakers complete their biographical data and financial disclosure information via the following link in advance of the activity:
 - <https://www.surveymonkey.com/r/CMEFinDis052021>
 - CVs, Profiles, and Biographical Sketches will not be accepted.
 - **Financial disclosures:**
 - Planners must complete financial disclosure via above referenced link prior to activity being approved for *AMA PRA Category 1 Credit*[™]
 - Ensure speakers complete financial disclosure at least 5 working days prior to lecture to allow time to resolve any potential conflicts of interest and receive approval for *AMA PRA Category 1 Credit*[™]
 - **Financial disclosure for each speaker must be provided to attendees at the beginning of each session (prior to the lecture), per the ACCME**
 - Speaker disclosure may be done using one or more of the following options:
 - PowerPoint slide (**see Forms and Resources on the CME web site for templates**)
 - Included in course handouts, if applicable (**see Forms and Resources on the CME web site for templates**)
 - Included in flyer, and then posted on the door of the session. (**see Forms and Resources on the CME web site for templates**)
 - Included in meeting invite for virtual RSS activities

Step 5 – Submit Requests for Medical Ethics and/or Professional Responsibility/Pain Management Credit

The Office of CME can facilitate the review of any presentation within the series for compliance with criteria established by the Texas Medical Board regarding Ethics and/or Professional Responsibility/Pain Management. To facilitate this process, please email the following information to Melissa Craig at CraigM@uthscsa.edu no less than 2 weeks prior to the presentation.

1. Date of presentation
2. Title of presentation
3. Speaker title
4. Learning objectives
 - a. For presentations related to medical ethics the learning objectives must mention ethics
 - b. For presentations related to professional responsibility (which include risk management, domestic abuse or child abuse), the learning objectives must mention risk management
 - c. Requirements for Pain Management must involve the study of the following topics:
 - best practices, alternative treatment options, and multi-modal approaches to pain management that may include physical therapy, psychotherapy, and other treatments;
 - safe and effective pain management related to the prescription of opioids and other controlled substances, including education regarding:
 - standards of care;
 - identification of drug-seeking behavior in patients; and
 - effectively communicating with patients regarding the prescription of an opioid or other controlled substances; and
 - prescribing and monitoring of controlled substances.
5. Presentation slides (in PowerPoint or pdf)

If your presentation is approved for Medical Ethics and/or Professional Responsibility/Pain Management, Melissa Craig will provide the Texas Medical Board Ethics/Pain Management statement for your marketing material.

Step 6 – Submit attendance documentation (electronic format)

RSS activities are encouraged to use the “CME Credit via TEXT” System for registration of attendance. Attendance documentation will only be accepted in an electronic format (by using the Attendance Roster template on the CME website under Forms and Resources/Regularly Scheduled Series). **Hard copy sign-in sheets are no longer accepted.** Attendance documentation for each session is due to Melissa Craig no later than 5 business days after the session has ended. File name of attendance roster template must be in the following format: Medicine Grand Rounds 1/1/21, 1/7/2021, etc.

Step 7 – Submit Post Activity Documentation:

Per the ACCME, attendees of your program must be provided with the opportunity to **evaluate the educational activity’s effectiveness in meeting the identified educational need in terms of their satisfaction, knowledge improvement, and skill improvement.** To meet this ACCME requirement, Melissa Craig will send an annual series evaluation for you to provide to your audience to complete by a specified date.

Step 8 – Responsibilities

The **RSS Chair/Content Expert** is responsible for the following:

- Ensuring** your Regularly Scheduled Series is in compliance with the guidelines/policies:
 - UTHSA HOP 10.1.11 - Guidelines for Interactions Between Clinicians and Industry
 - UTHSA HOP 10.1.12 - Policy on Conflict of Interest
 - UTHSA Office of Continuing Medical Education Policy on Review and Approval of CME Ethics/Professional Responsibility Credit/Pain Management Credit
 - UTHSA HOP 2.4.1 - Continuing Education Policy
 - Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education – 12_1_2020
 - ACCME Policies and Accreditation Criteria - <https://www.accme.org/educatorstoolkit>
- Completing** the **RSS Activity Application for CME**
- Providing** your RSS Activity Coordinator with proposed and confirmed speaker(s) and their contact information
- Supporting** the RSS Activity Coordinator in obtaining the required documentation from planning committee members/proposed speaker(s)
- Reviewing** speaker presentation(s) to resolve Conflict of Interest (when applicable) and email the respective CME conference coordinator accordingly.
- Verifying** that Financial Disclosure took place before presentation
 - Verification may include financial disclosure on a slide and/or verbally
- Completing** the Conflict of Interest Presentation Review Form when a speaker discloses relationships.
- Completing** the Resolution of Conflict of Interest Form for Planning Committee Members when a planning committee member discloses relationships.

The **RSS Activity Coordinator** is responsible for the following:

Newly assigned RSS Activity Coordinators should contact Melissa Craig with the Office of CME via email at CraigM@uthscsa.edu to schedule training.

- Submit** completed RSS Activity Application for CME with supporting documentation to Melissa Craig at CraigM@uthscsa.edu in the Office of CME prior to beginning of annual series.
- Provide** current SurveyMonkey link for the Speaker/Planner Financial Disclosure forms to planners/speakers.

➤ **PLEASE NOTE: Beginning FY21-22 Academic Year, financial disclosures will now be valid for a period of 2 years from date of completion**

- For planners – this should be completed before the first session begins
- For speakers – this should be completed at least 5 days prior to their lecture
 - For speakers that you believe may be providing a presentation anytime during the upcoming academic year, we suggest requesting that they all complete a disclosure prior to the beginning of the academic year. Having the speakers complete their financial disclosures at the beginning of the academic year will save you time as you prepare your flyers/meeting invites/etc each week to distribute.
- For planners and speakers – be sure to instruct them to note the name of your grand rounds/M&M/tumor board/case conference in the Activity Title when they are completing their disclosure.

Review weekly master financial disclosure spreadsheet sent each Monday by Melissa Craig for financial disclosure information for your marketing materials.

Submit marketing materials (flyers/meeting invites/etc) to Melissa Craig at CraigM@uthscsa.edu prior to distribution for review/approval for compliance.

- All marketing materials **MUST** contain
 - disclosure statements for planning committee members and speakers
 - Continuing Medical Education statements (accreditation and credit designation statements)
- SUBJECT LINE MUST INCLUDE YOUR ACTIVITY TITLE AND **DATE**:
 - Medicine Grand Rounds 1/1/2021, 1/7/2021, etc

Submit presentations **ONLY** when:

- **UTHSA or Non-UTHSA faculty** disclose financial relationships
- **Non-UTHSA (visiting) faculty** are presenting at your activity

These presentations should be submitted to Melissa Craig in advance (3 days minimum) of the lecture for review/approval. (Draft version is acceptable.)

- Ensure Conflict of Interest (COI) form is completed by RSS chair or their delegate **AND** that the completed form is returned to Melissa Craig / CraigM@uthscsa.edu

Retain completed Model Authorization Release Form (formerly titled the Talent Release Form) in **your files**. It is only required to be completed for **non-UTHSA** faculty (**ONLY** if session is videotaped)

- Provide** attendance mechanism – either by providing a “CME Credit via TEXT” Activity Code to the attendees of your RSS or providing Melissa Craig a roster of attendees (by using the Attendance Roster template on the CME website under Forms and Resources/Regularly Scheduled Series), with spreadsheet labeled with name of RSS activity and date of session.
- Distribute** the annual RSS Overall Series Evaluation to your activity attendees when requested.

The **Office of CME** is responsible for the following:

- Responding promptly to CME inquiries
 - Communicating with RSS Activity Coordinators on a regular basis regarding updates
- Reviewing the completed **RSS Activity Application for CME** to ensure compliance current ACCME accreditation criteria.
 - Review presentations of visiting faculty or speakers with disclosures for any commercial bias
 - Identify potential conflicts of interest
- Notifying the RSS Chair/RSS Activity Coordinator when there is a Conflict of Interest with a speaker and provide the Conflict of Interest Presentation Review Form for completion prior to the speaker’s lecture.
- Notifying the RSS Chair/RSS Activity Coordinator when there is a Conflict of Interest with a planning committee member and provide the Resolution of Conflict of Interest Form for Planning Committee Members for completion.
- Designating approved regularly scheduled series for *AMA PRA Category 1 Credit™*.
- Tracking CME participation and credit for each RSS activity for up to six years
- Submitting requests for educational grants from commercial interests
- Executing letters of agreement with commercial interest for educational grants
- Communicating updates to RSS Activity Coordinators via emails / newsletters / workshops
- Monitoring the Regularly Scheduled Series usage of ACCME accreditation and AMA designation statements and the documentation submitted by the RSS Activity Coordinator
- Monitoring the Regularly Scheduled Series for compliance with the following:
 - UTHSA HOP 10.1.11 - Guidelines for Interactions Between Clinicians and Industry
 - UTHSA HOP 10.1.12 - Policy on Conflict of Interest
 - UTHSA Office of Continuing Medical Education Policy on Review and Approval of CME Ethics and/or Professional Responsibility Credit
 - UTHSA HOP 2.4.1 - Continuing Education Policy
 - Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education – 12_1_2020
 - ACCME Policies

Office of CME Management Fees:

The Office of CME offers any one of the following services for all CME activities. Standard services provided for UTHSA RSS activities are noted below.

File Management for CME	Inclusive of record data management, credit records, transcripts, audit services for state/national medical board, retention of records
Accreditation Maintenance	Monitoring and ensuring compliance with various accreditation bodies, manage peer review process for content
Faculty Management	Collect and review faculty documentation needed for CME accreditation
	Manage disclosure process and conflicts of interest resolution process
Technical Support	Provide on-line registration services/via CME Credit via TEXT System
	Develop/maintain on-line annual evaluation instrument
	Develop online certificates and/or transcripts
	Upload activity to CME Web site
Marketing	Review/approve all marketing communications
Administrative and management	ACCME annual reporting
RSS Chair/RSS Activity Coordinator post conference meeting	Review evaluation summaries
	Pre-planning activities for upcoming year