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|  | **University of South Alabama Office of CME**  **IPCE Activity Application and Planning Worksheet**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |
| Directly Provided OR Jointly Provided    *AMA PRA Category 1 Credit*™ ACPE ANCC APA ASBSWE BOC CDR NBCC SHRM ABA MOC ABIM MOC ABOHNS MOC ABO MOC ABP MOC  ABPath MOC ABS MOC | | |
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Thank you for considering USA’s Office of Continuing Medical Education (OCME) as a partner in your efforts to improve patient outcomes through reducing or eliminating an identified practice gap of your healthcare team.

Note: The Office of CME **must** be involved in all stages of the planning of the activity to ensure independence from eligible and ineligible entities, compliance with the Joint Accreditation criteria, Standards for Integrity and Independence in accredited CME, and USA’s Office of CME’s mission, and Policies and Procedures.

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| **USA OCME Mission Statement**  The University of South Alabama (USA) Office of Continuing Medical Education (OCME) provides an evidence-based practice curriculum for healthcare professionals and their teams to measurably improve knowledge, competence, skills/strategies, performance, and patient outcomes for those in this region. |

Invitation to planning meetings need to be at least 72 hours in advance.

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|  | **Activity and Demographic Information** |  |

Group  Activity

Date       Day Time       Location       #Hours

Chair       Email       Phone       Address       City, State Zip

Coordinator       Email       Phone       Address       City, State Zip

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| **Identification and Mitigation of Relevant Financial Relationships**  **for Planners, Faculty, Reviewers, and Others [**[**JAC 12**](https://jointaccreditation.org/accreditation-process/requirements/criteria/)**]** | | | | | |
| **Name** | **Role in Activity** | **Financial Relationship**  **STEPS TAKEN TO MITIGATE RELATIONSHIP** | **Relationship**  **ended?** | | **Date Discl**  **Received** |
| Sharrie D’Andrea Cranford, LICSW, PIP, MS (Clinical Social Worker) | Planner, reviewer | Steps | |  |  |
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|  | **Educational Considerations** |  |

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| 1. Practice gaps [(JAC 4)](https://jointaccreditation.org/accreditation-process/requirements/criteria/?_gl=1*1jc2r62*_up*MQ..*_ga*MTIzNTAwNjg4Mi4xNzA2MjA1NTk5*_ga_48XN5R3JR6*MTcwNjIwNTU5OC4xLjEuMTcwNjIwNTYzMS4wLjAuMA..)  (max 100 words)   (Problem you are trying to address)   1. How do you know this is a practice gap? [[JAC 6](https://jointaccreditation.org/accreditation-process/requirements/criteria/) and [SII 1](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-1-ensure-content-valid)] 2. What needs were determined to resolve the practice gaps? (150 words) 3. Educational needs that apply to this activity - Knowledge Skills/Strategy Performance 4. How will this activity change the healthcare team’s skills/strategy, performance, or patient outcomes? [[JAC 5](https://jointaccreditation.org/accreditation-process/requirements/criteria/)] |
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| 1. Objectives [[JAC 6](https://www.aamc.org/system/files?file=2019-07/learning-objectives.pdf)] |
| 1. How will the team will learn from, with, and about each other? [[JAC 7](https://www.celt.iastate.edu/wp-content/uploads/2017/03/CELT226activelearningtechniques.pdf)] |
| 1. Describe the adjuncts that will be provided to sustain change. [[JAC 9](https://jointaccreditation.org/accreditation-process/requirements/criteria/)] |
| 1. How will this activity address barriers to change of the individual/healthcare team?. [[JAC 10](https://jointaccreditation.org/accreditation-process/requirements/criteria/)] 2. What strategies will be used to obtain data or information about changes in the healthcare team’s skills/strategy or performance or patient outcomes as a result of this activity? (including, questions you asked learners about changes in healthcare team skills/strategy or performance or other change data such as quality improvement or patient outcomes.) [[JAC 11](https://jointaccreditation.org/accreditation-process/requirements/criteria/)] 3. Provide the compiled or summative data or information generated from this activity about changes achieved in the healthcare team’s skills/strategy or performance or patient outcomes. Attached post activity or provide information from previous activity. |
| **ACGME – IOM - IPEC**  Accreditation Council for Graduate Medical Education Competencies  Institute of Medicine Competencies  Interprofessional Education Collaborative (IPEC) Competencies |
| |  |  |  | | --- | --- | --- | | Select all that apply - desirable attribute(s) of the healthcare team competencies that this activity addresses.  Core Competencies | | | | **Institute of Medicine Competencies** | **Interprofessional Collaborative Practice** | **ACGME/ABMS Competencies** | | Provide Patient-Centered Care  Work in Interdisciplinary Teams  Employ Evidence-Based Practice  Utilize Informatics  **Explain here** | Values/Ethics for Interprofessional Practice  Roles/Responsibilities  Interprofessional Communication  Teams and Teamwork | Patient Care and Procedural Skills  Medical Knowledge  Quality Improvement  Practice-Based Learning and Improvement  Interpersonal and Communication Skills  Professionalism  Systems-Based Practice | | **Other competency/competencies Enter Response Here** | | | |
| **ACGME**-Patient care and procedural skills - Provide patient care that is compassionate, appropriate, and effective for the treatment of health problems and the promotion of health. **IOM**-Provide patient-centered care (what you do) - Identify, respect, and care about patients' differences, values, preferences, and expressed needs; listen to, clearly inform, communicate with, and educate patients; share decision making and management; and continuously advocate disease prevention, wellness, and promotion of healthy lifestyles, including a focus on population health.  **ACGME**-Medical knowledge - Demonstrate knowledge about established and evolving biomedical, clinical, and cognate (e.g. epidemiological and social-behavioral) sciences and the application of this knowledge to patient care.  **ACGME**-Practice-based learning and improvement - Investigate and evaluate their patient care practices, appraise and assimilate scientific evidence, and improve their patient care practices. **IOM** - Employ evidence-based practice - Integrate best research with clinical expertise and patient values for optimum care, and participate in learning and research activities to the extent feasible. IOM - Apply quality improvement - Identify errors and hazards in care; understand and implement basic safety design principles, such as standardization and simplification; continually understand and measure quality of care in terms of structure, process, and outcomes in relation to patient and community needs; and design and test interventions to change processes and systems of care, with the objective of improving quality.  **ACGME**-Interpersonal and communication skills - Demonstrate interpersonal and communication skills that result in effective information exchange and teaming with patients, patients’ families, and professional associates. **IPEC**-Communication - Communicate in a responsive, responsible, respectful, and compassionate manner with team members.  **ACGME**-Professionalism (how you act) - Demonstrate a commitment to carrying out professional responsibilities, adherence to ethical principles, and sensitivity to a diverse patient population.  **ACGME**-Systems-based practice -Demonstrate an awareness of the larger context/system of health care and the ability to effectively call on system resources to provide care that is optimal value.  **IOM**-Work in interdisciplinary teams - Cooperate, collaborate, communicate, and integrate care in teams to ensure that care is continuous and reliable. **IPEC**-Teams and Teamwork - Apply values and principles of the science of teamwork to adapt one’s own role in a variety of team settings. **IPEC**-Roles and Responsibilities - Use the knowledge of one's own role and team members’ expertise to address individual and population health outcomes. **IPEC**-Values and Ethics - Work with team members to maintain a climate of shared values, ethical conduct, and mutual respect.  **IOM**-Utilize informatics - Communicate, manage knowledge, mitigate error, and support decision making using information technology. |

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|  | **Commendation Considerations** |  |

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| [JAC 13](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – Patient/public representative will be included as planners and teachers in this activity. |
| [JAC 14](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – Health profession students will be included as planners and teachers in this activity. |
| [JAC 17](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – We integrated the collection, analysis, or synthesis of health and/or practice data to teach learners in the planning and presentation of this activity about healthcare improvement. |
| [JAC18](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – We identified and will address factors beyond clinical care (e.g., social determinants) that affect the health of patients and integrate those factors in this activity. |
| [JAC20](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – We designed this activity (that includes direct observation and formative feedback) to optimize communications skills of learners. (Hands-on/demonstration activities) |
| [JAC 21](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – We designed this activity (that includes direct observation and formative feedback) to optimize technical and procedural skills of learners. (Hands-on/demonstration activities) |
| [JAC 22](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – We facilitated the implementation of individualized learning plans. Tracks the repeated engagement of the learner/team with a longitudinal curriculum/plan over weeks/months and provides individualized feedback to the learner/team to close practice gaps. |
| [JAC 23](https://jointaccreditation.org/accreditation-process/requirements/commendation/) – We will evaluate and demonstrate improvement in the performance of healthcare teams as a result of this activity. The Office of CME manages this through their annual evaluation that assess for performance changes within the healthcare team based on this activity. |

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|  | **Planning Discussion** |  |

Invitation to planning meetings needs to be at least 72 hours in advance.

Activity  Planning Meeting Date

Planners present       Planners absent       Disclosures       Meeting discussions

Yes, we did **No, we did not** (add $800/$1000 validity fee) If no, explain why:

involve USA’s Office of CME in all aspects of the planning process as evidenced by the minutes above. We understand if we did not involve the OCME in all aspects of the planning process there will be an additional $800/$1000 validity fee.

**Draft agenda (7 hours) or include your own**

7:00-7:45 Check-in and Breakfast

7:45 Introduction, welcome, housekeeping, disclosures

**8:00 – 9:00 1st talk/hour**

9:00 – 9:05 Brain Break

**9:05 – 10:05 2nd talk/hour**

10:05 – 10:20 Morning Brain Break

**10:20 – 11:20 3rd talk/hour**

11:20 – 11:25 Brain Break

**11:25 – 12:25 4th talk/hour**

12:25 – 1:25 Lunch

**1:25 – 2:25 5th talk/hour**

2:25 – 2:30 Brain Break

**2:30 – 3:30 6th talk/hour**

3:30 – 3:45 Afternoon Brain Break

**3:45 – 4:45 7th talk/hour**

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|  | **University of South Alabama Office of CME**  **ACCME Standards for Integrity and Independence**  **In Accredited Continuing Education**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

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| **Standard 1: Ensure Content is Valid** | | |
| [1.1](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-1-ensure-content-valid) | All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options. | |
| [1.2](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-1-ensure-content-valid) | All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation. | |
| [1.3](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-1-ensure-content-valid) | Although accredited continuing education is an appropriate place to discuss, debate, and explore new and evolving topics, these areas need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning. | |
| [1.4](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-1-ensure-content-valid) | Organizations cannot be accredited if they advocate for unscientific approaches to diagnosis or therapy, or if their education promotes recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients. | |
| **Standard 2: Prevent Commercial Bias and Marketing in Accredited Continuing Education** | | |
| [2.1](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-2-prevent-commercial-bias-and-marketing-accredited-continuing) | | The accredited provider must ensure that all decision related to the planning, faculty selection, delivery, and evaluation of accredited education are made without any influence or involvement from the owners and employees of an ineligible company. |
| [2.2](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-2-prevent-commercial-bias-and-marketing-accredited-continuing) | | Accredited education must be free of marketing or sales of products or services. Faculty must not actively promote or sell products or services that serve their professional or financial interests during accredited education. |
| [2.3](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-2-prevent-commercial-bias-and-marketing-accredited-continuing) | | The accredited provider must not share the names or contact information of learners with any ineligible (or eligible) company or its agents without the explicit consent of the individual learner. |
| **Standard 3: Identify, Mitigate, and Disclose Relevant Financial Relationships** | | |
| [3.1](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-3-identify-mitigate-and-disclose-relevant-financial-relationships) | | Collect information from all planners, faculty, and others in control of educational content about all their financial relationships with ineligible companies within the prior 24 months. There is no minimum financial threshold; individuals must disclose all financial relationships, regardless of the amount, with ineligible companies. Individuals must disclose regardless of their view of the relevance of the relationship to the education. Disclosure information must include: a. The name of the ineligible company with which the person has a financial relationship. b. The nature of the financial relationship. Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual’s institution receives the research grant and manages the funds. |
| [3.2](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-3-identify-mitigate-and-disclose-relevant-financial-relationships) | | Exclude owners or employees of ineligible companies: Review the information about financial relationships to identify individuals who are owners or employees of ineligible companies. These individuals must be excluded from controlling content or participating as planners or faculty in accredited education. There are three exceptions to this exclusion—employees of ineligible companies can participate as planners or faculty in these specific situations: a. When the content of the activity is not related to the business lines or products of their employer/company. b. When the content of the accredited activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations. c. When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used. |
| [3.3](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-3-identify-mitigate-and-disclose-relevant-financial-relationships) | | Identify relevant financial relationships. Review the information about financial relationships to determine which relationships are relevant. Financial relationships are relevant if the educational content an individual can control is related to the business lines or products of the ineligible company. |
| [3.4](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-3-identify-mitigate-and-disclose-relevant-financial-relationships) | | Mitigate relevant financial relationships. Take steps to prevent all those with relevant financial relationships from inserting commercial bias into content. a. Mitigate relationships prior to the individuals assuming their roles. Take steps appropriate to the role of the individual. For example, steps for planners will likely be different than for faculty and would occur before planning begins. b. Document the steps taken to mitigate relevant financial relationships. |
| [3.5](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-3-identify-mitigate-and-disclose-relevant-financial-relationships) | | Disclose all relevant financial relationships to learners. Disclosure to learners must include each of the following: a. The names of the individuals with relevant financial relationships. b. The names of the ineligible companies with which they have relationships. c. The nature of the relationships. d. A statement that all relevant financial relationships have been mitigated. **Identify ineligible companies by their name only**. Disclosure to learners must not include ineligible companies’ corporate or product logos, trade names, or product group messages. **Disclose absence of relevant financial relationships**. Inform learners about planners, faculty, and others in control of content (either individually or as a group) with no relevant financial relationships with ineligible companies. **Learners must receive disclosure information, in a format that can be verified at the time of accreditation, before engaging with the accredited education**. **Exceptions:** Accredited providers do **not** need to identify, mitigate, or disclose relevant financial relationships for any of the following activities: 1. Accredited education that is non-clinical, such as leadership or communication skills training. 2. Accredited education where the learner group is in control of content, such as a spontaneous case conversation among peers. 3. Accredited self-directed education where the learner controls their educational goals and reports on changes that resulted, such as learning from teaching, remediation, or a personal development plan. When accredited providers serve as a source of information for the self-directed learner, they should direct learners only to resources and methods for learning that are not controlled by ineligible companies. |
| **Standard 4: Manage Commercial Support Appropriately** | | |
| [4.1](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-4-manage-commercial-support-appropriately) | | Decision-making and disbursement: The accredited provider must make all decisions regarding the receipt and disbursement of the commercial support. a. Ineligible companies must not pay directly for any of the expenses related to the education or the learners. b. The accredited provider may use commercial support to fund honoraria or travel expenses of planners, faculty, and others in control of content for those roles only. c. The accredited provider must not use commercial support to pay for travel, lodging, honoraria, or personal expenses for individual learners or groups of learners in accredited education. d. The accredited provider may use commercial support to defray or eliminate the cost of the education for all learners. |
| [4.2](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-4-manage-commercial-support-appropriately) | | Agreement: The terms, conditions, and purposes of the commercial support must be documented in an agreement between the ineligible company and the accredited provider. The agreement must be executed prior to the start of the accredited education. An accredited provider can sign onto an existing agreement between an accredited provider and a commercial supporter by indicating its acceptance of the terms, conditions, and amount of commercial support it will receive. |
| [4.3](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-4-manage-commercial-support-appropriately) | | Accountability: The accredited provider must keep a record of the amount or kind of commercial support received and how it was used, and must produce that accounting, upon request, by the accrediting body or by the ineligible company that provided the commercial support. |
| [4.4](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-4-manage-commercial-support-appropriately) | | Disclosure to learners: The accredited provider must disclose to the learners the name(s) of the ineligible company(ies) that gave the commercial support, and the nature of the support if it was in-kind, prior to the learners engaging in the education. Disclosure must not include the ineligible companies’ corporate or product logos, trade names, or product group messages. |
| **Standard 5: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education** | | |
| [5.1](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-5-manage-ancillary-activities-offered-conjunction-accredited) | | Arrangements to allow ineligible companies to market or exhibit in association with accredited education must not:  a. Influence any decisions related to the planning, delivery, and evaluation of the education. b. Interfere with the presentation of the education. c. Be a condition of the provision of financial or in-kind support from ineligible companies for the education. |
| [5.2](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-5-manage-ancillary-activities-offered-conjunction-accredited) | | The accredited provider must ensure that learners can easily distinguish between accredited education and other activities. a. Live continuing education activities: Marketing, exhibits, and nonaccredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled and communicated as such. b. Print, online, or digital continuing education activities: Learners must not be presented with marketing while engaged in the accredited education activity. Learners must be able to engage with the accredited education without having to click through, watch, listen to, or be presented with product promotion or product-specific advertisement. c. Educational materials that are part of accredited education (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) must not contain any marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages. d. Information distributed about accredited education that does not include educational content, such as schedules and logistical information, may include marketing by or for an ineligible company. |
| [5.3](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-5-manage-ancillary-activities-offered-conjunction-accredited) | | Ineligible companies may not provide access to, or distribute, accredited education to learners. |

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|  | **University of South Alabama Office of CME**  **Brochure Checklist**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

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| **Accreditation Statements** | |
| In support of improving patient care, USA’s College of Medicine Office of CME is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team. Provider Number: 4008198  **OR**  In support of improving patient care, this activity has been planned and implemented by  and USA’s College of Medicine Office of CME is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team. Provider Number: 4008198 | |
| **Credit Designation Statements** | |
| **JA**  **CME**  **ANCC**  **ACPE**  **APA**  **ABSWE**  **NBCC**    **BOC**  **CDR**  **SHRM**  **APOST**  **Educators** | This activity was planned by and for the healthcare team, and learners will receive       Interprofessional Continuing Education credits for learning and change.  The University of South Alabama College of Medicine 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.  This program has been reviewed and is acceptable for up to       nursing contact hours.  This course has been approved for       hours of pharmacy continuing education credit. The approval number issued is: \_\_\_\_\_\_\_\_\_  Continuing Education (CE) credits for psychologists are provided through the co-sponsorship of the American Psychological Association (APA) Office of  Continuing Education in Psychology (CEP). The APA CEP Office maintains responsibility for the content of the programs.  USA Office of CME has been approved by the Alabama State Board of Social Work Examiners as a continuing education provider. Provider Number 0465  USA Office of CME has been approved by NBCC as an Approved Continuing Education Provider, ACEP No. 7261. Programs that do not qualify for NBCC  credit are clearly identified. USA Office of CME is solely responsible for all aspects of the programs.  The University of South Alabama College of Medicine (BOC AP# P4008198) is approved by the Board of Certification, Inc. to provide continuing education to Athletic Trainers (ATs). This program is eligible for a maximum of       Category A hours/CEUs. ATs should claim only those hours actually spent in the educational program.  Completion of this RD/DTR profession-specific or IPCE activity awards CPEUs (One IPCE credit=One CPEU). If the activity is dietetics-related but not targeted to RDs or DTRs, CPEUs may be claimed which are commensurate with participation in contact hours (One 60 minute hour=1 CPEU). RDs and DTRs are to select activity type 102 in their Activity Log. Sphere and Competency selection is at the learner’s discretion.  This program is valid for       PDCs for the SHRM-CP® or SHRM-SCP®. For more information about certification or recertification, please visit [www.shrmcertification.org](http://www.shrmcertification.org/). Provider ID: RP4873  Alabama Peace Officers Standards & Training Commission credits, if approved by your agency head. This training offers       APOST credits.  USA Office of CME – This training is approved to offer       professional development hours for teachers and school administrators. Registration through PowerSchool is required. (special permission required) |
| Accredited Continuing Nursing Education - Association of Nurses in ...American Psychological Association logoC:\Users\scranford\AppData\Local\Microsoft\Windows\INetCache\Content.MSO\D4788920.tmpC:\Users\scranford\Pictures\CME photos\Flyer images\Logo IPCE_Credit_JPEG.jpg | |
| **Disclosures -** In compliance with JA Accreditation Criteria and the ACCME Standards for Integrity and Independence we ensure that anyone in a position to affect or control the content of the educational activity has disclosed all relevant financial relationships with any commercial interest. All reported conflicts are managed by a designated official to ensure a bias-free presentation. Please see the insert to this program, for the complete disclosure list. | |
| **ADA Statement** - Participants requiring special accommodations or with dietary restrictions should contact at in person two weeks prior to the date of activity. | |
| **Credit Withdrawal -** Great steps were put in place for the rare instances that USA Office of CME may withdraw credit from this activity at any time during the development or deployment process if any violation of accreditation standards, criterion, compliance, and/or content validity. | |
| **Commercial Support or Exhibitors (must be accompanied by a Letter of Agreement or Vendor Agreement) -** This activity thanks the following for their support of this activity through educational grants or as exhibitors.       **Or** A complete list of grantors and/or exhibitors will be provided prior to the start of the activity. | |
| **Activity**: date, title, agenda, objectives, disclosures, target audience, practice gap, accreditation logos, directions, parking, and lodging options | |
| **Registration**: Name, credentials, affiliation, address, and email | |
| **Cancellation Policy -** A written notice of cancellation must be received       days prior to the start of this activity. A $      cancellation fee will be assessed at that time; after that date, cancellation requests cannot be honored. | |

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|  | **University of South Alabama Office of CME**  **Accreditation Agreement**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

Program Title  Date

The purpose of this agreement is to articulate the roles and responsibilities of the University of South Alabama Office of Continuing Medical Education (USA OCME) and  **(partners)** in planning, marketing, budgeting, implementing, and evaluating this CME activity. This agreement is for .

1. USA’s Office of Continuing Medical Education will be involved in all planning stages from the inception. If the Office

of CME makes the determination that planning occurred without their involvement, credit will be withdrawn. This can

and will occur up to and at the time the conference starts and/or ends. Invitation to planning meetings should be

coordinated with the Office of CME and scheduled at least 72 hours in advance.

2. All planning meetings must include members from all **partners** must be held at a time and place convenient to all

parties. Documentation of all meetings will be part of the permanent activity file.

3. Objectives must be developed for each course and talk, and these objectives must be provided to all participants in

addition to being maintained in the activity file.

4. The Office of CME assumes ultimate responsibility for the following:

a. Selection of faculty, correspondence with speakers, learning objectives, content, presentation, target audience, logistics, disclosure statement, syllabus materials, advertisement, record keeping, and evaluation.

b. Approval and review of the CME Application.

c. Approval of all advertisement and publicity.

d. Receipt and disbursement of commercial support funds.

5. The content of all brochures, advertisements, and any materials must be approved 48 hours in advance of being sent to the printers, by the OCME in writing*.*

6. All printed materials created must carry accreditation and designation statements verbatim as listed on the brochure checklist.

7. If the Office of CME makes the determination that any materials were created, printed, and/or published without the prior approval of the Office of CME, credit will be withdrawn. This can and will occur up to and at the time the conference starts and/or ends. (see also #22 below)

8. A detailed budget must be developed for this activity. This budget must specify each activity’s financial obligations with

respect to the activity income and expenses.

9. No marketing, sales, or any materials with product advertising, logos, or slogans may be attached to any activity

materials without the prior written approval of the OCME.

10. No changes will be made to any educational activities without the written consent of the OCME.

11. No promotional materials will be distributed without the review and written consent of the OCME.

12. All participating organizations agree to not engage in marketing or product promotion during the educational activity.

In addition, exhibits nor displays will be present in the meeting room nor in the obligatory pathway of the meeting area.

Organizers of the activity must disclose in both written activity publicity and verbally before the activity

a. the commercial supporter(s) of the activity, including exhibitors, and

b. all conflicts of interest within any outside organization.

13. The Office of CME adheres to the ACCME’s Standards for Integrity and Independence™. As required in these

standards, University of South Alabama Office of CME and its partners must inform representatives who provide

educational grants

a. The company must adhere to the ACCME’s Standards for Integrity and Independence™.

b. All dollars provided in support of the activity must be in the form of an educational grant made payable to South Alabama Medical Science Foundation (SAMSF).

c. Upon request, the OCME will provide the company with an income and expense report.

d. The company representative must complete and sign the OCME Letter of Agreement.

14. Attendance must be taken by persons responsible for the CME activity using the assigned attendance sheet provided

by the Office of CME. Upon completion, attendance sheet must be sent to the OCME for the activity file**.** CME

certificates will be provided to all attendees within 90 days of the activity, or immediately following receipt of participant

evaluation. If a certificate is not obtained, the attendee may request a certificate from the OCME. All attendance records

will be maintained in the OCME for a minimum of six years.

15. The attendance sheet nor information regarding the participants will be shared with anyone, including the exhibitors

without the expressed consent of the participant.

**16. At least one CME representative will be present at all conferences. It is required that any expenses (lodging / meals / travel) for the CME staff member(s) will be paid by/from the conference account.**

17. One member of the CME Committee may attend this activity as a CME reviewer, to review for ACCME Standards for

Integrity and Independence. The conference fee for this representative must be waived. The representative will be

responsible for their lodging, meals, and travel expenses.

18. All CME activities should be evaluated by the attendees. The CME Committee will review evaluation summaries.

19. A continuing medical education activity cannot be provided or jointly provided by an ACCME defined ineligibility

entity.

20. An ACCME defined ineligible entity, is any entity producing, marketing, re-selling, or distributing healthcare

goods or services consumed by, or used on, patients. The ACCME does not consider providers of clinical service directly

to patients to be an ineligible entity.

21. Our last three activities have been accredited with      . If this is different from USA Office of CME, please explain why you are no longer using the above-named provider.

**22. It is understood the USA Office of CME may withdraw credit from this activity without penalty, particularly**

**since issues related to accreditation compliance and content validity may only become apparent late in the activity**

**development or deployment process.**

23. Our organization is not owned, controlled, affiliated or fiscally controlled by another organization (parent

organization) which is considered an ACCME defined ineligible entity.

24. Our organization is not involved in providing commercial or other company-directed activities or services for

pharmaceutical companies, medical device manufacturers, nutraceutical, or herbal supplement companies, etc., including

but not limited to advertising/promotional services, publication planning, speaker bureau management, speaker training,

and advisory board/consultant meeting planning.

25. We understand a coordinator, chairperson, or representative of the planning committee is required to attend the

annual CME Training to be eligible for CME credit.

I agree with the terms as stated above and attest to the statements as true and accurate.

Signature       Date

|  |  |  |
| --- | --- | --- |
|  | **University of South Alabama Office of CME**  **Exhibitor Agreement**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

Activity  Company  Product/Service

Representative  Email  Phone

Address  City, State, Zip

The coordinators for this activity agree to assign space for this activity according to the following terms, conditions, and requirements

Terms, Conditions, and Requirements

1. Space will be leased for the duration of this activity $  fee.

2. All scheduled breaks will be held in the break/dining area.

3. Fire laws will be strictly observed. Aisles and fire exits cannot be blocked by tables, cables, boxes, or other items.

4. The University of South Alabama (USA) cannot guarantee exhibitors against loss or damage of any kind but will endeavor to protect the exhibit area according to standard security protection.

5. Exhibitors agree to refrain from pasting, nailing, or otherwise attaching signs or other displayed materials to walls, doors, backdrops, floors, and carpets or other in any way that mars or defaces them. Any damages to the surfaces will be paid for by the exhibitor.

6. Exhibits should not project beyond the space allocation nor obstruct the view of or interfere with other exhibits.

7. To avoid infringing on others, all interviews, demonstrations, distribution of literature, sales promotions, and other similar activities should be conducted at the exhibitor’s table.

8. Exhibitors producing noise or interference, which is not controlled, will be relocated to reduce such interference.

9. Exhibitors are responsible for arranging electrical hook-ups and AV needs.

10. Exhibitors are responsible for removing exhibit materials at the end of the activity.

11. Special written agreement must be made in advance if two or more companies/groups exhibit in a single space.

12. To receive a refund, written notice of cancellation must be received  days prior to the beginning of this activity.

13. Other than educational materials, direct sales involving the exchange of funds in the exhibit areas by any exhibitor or their agent is prohibited.

14. USA makes all space assignments without preconditions and reserves the right to rearrange the floor plan and to relocate any exhibitor’s space.

15. Infractions of these Terms, Conditions, and Requirements on the part of the exhibitor or representative may result in dismissal from the exhibit area.

16. Space is leased with the understanding that the activity coordinators and USA’s OCME assumes no liability whatsoever for damages resulting from any act of omission or commission in connection with the exhibition of products and services.

17. The exhibitor and its representative hereby release and agree to indemnify the University of South Alabama (USA) and USA’s Office of CME from all liabilities for loss to any person or entity relative to this rental of tabletop space, ensuing from any cause whatsoever, except the intentional misconduct of the University of South Alabama or USA’s OCME.

18. No promotional activities before, during, or after, shall be permitted in the same room as the educational activity.

19. Exhibitors are to refrain from entering the education area.

**20. USA Office of CME may withdraw credit from this activity without penalty, particularly since issues related to accreditation compliance and content validity may only become apparent late in the activity development or deployment process.**

21. Full payment must be received to activate the contract. Checks should be made payable and mailed to South Alabama Medical Science Foundation Tax ID# 63-0819233 c/o CME 5795 USA Drive North, CSAB 104, Mobile, Alabama 36688 or to another designated entity .

22. Communications pertaining to this contract can be directed to (     )      -      / .

My signature below attests that I have read the above and will abide by all Terms, Conditions, and Requirements in this agreements.

|  |  |
| --- | --- |
|  |  |
| **Type Exhibitor Representative Name Here** | Date |

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| --- | --- | --- |
|  | **University of South Alabama Office of CME**  **Invoice**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Department** |  | **Activity Title** |  |
| **Contact Person** |  |
| **Date of Activity** |  | **Location of Activity** |  |

| **Fees** | |
| --- | --- |
| Application fee (Due with application.) |  |
|  |  |
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|  |  |
|  |  |
| Total Due to the Office of CME (non-refundable)  Final invoice (including expenses/fees) will be submitted within 90 day of the last day of the activity. | $0.00 |

| MSF or FOAPAL # |  |
| --- | --- |

|  |  |
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|  |  |
|  | Date **Sign in blue ink.** |

|  |  |
| --- | --- |
|  |  |
| **Sharrie D’Andrea Cranford** | Date |

Sharrie D’Andrea Cranford, LICSW, PIP, MS

Director, USA Office of Continuing Medical Education

Make checks payable to

**South Alabama Medical Science Foundation** c/o USA Office of CME

5795 USA Drive North, CSAB 104

Mobile, Alabama 36688

MSF Account to Credit 53-1-62979-004

FOAPAL to Credit 178025-710600-718130-4100

**USA Office of CME may withdraw credit from this activity without penalty, particularly since issues related to accreditation**

**compliance and content validity may only become apparent late in the activity development or deployment process.**

Review Mitigation Form or more details. Examples of non-compliance would include ineligible company logos, slogans, brand names within a presentation.

|  |  |  |
| --- | --- | --- |
|  | **University of South Alabama Office of CME**  **Fee Schedule**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

USA OCME approved activities **may** receive the following services at no additional charge: AV support/recording and production, conference planning, certificates, sign-in-sheet, assist with flyer/brochure, editing, evaluation, follow-up evaluation, technical assistance, online registration, onsite registration, fee collection, assist with accounts receivable, payable, and budgeting. (Services listed above are not guaranteed but offered gratis when available.)

|  |  |  |
| --- | --- | --- |
| **Description**  Fees include All appropriate credit offered by the OCME. | **Fee** | **Jointly Provided** |
| RSS / Grand Rounds – Weekly (52 x a year) | $ 1200 | $ 1500 |
| RSS / Grand Rounds – Bi-Monthly (24 x a year) | $ 900 | $ 1125 |
| RSS / Grand Rounds – Monthly (12 x a year) | $ 700 | $ 875 |
| RSS / Grand Rounds – Quarterly (4x a year) | $ 300 | $ 375 |
| Conference | $ 150 (per hour) | $ 190 (per hour) |
| Enduring Material (1-year duration) | $ 100 (per hour) | $ 125 (per hour) |
| Individualized training up to 8 hours (Simulation) | $ 800 | $ 1000 |
| Printed name badges by OCME | $ 1.00 each | $ 1.00 each |
| **Rush Fees** | | |
| Application and planner disclosures received less than 70 business days prior to activity. | $ 800 | $ 1000 |
| Completed Disclosure Objective Form with slides for every speaker received less than 10 business days prior to the start of the activity. Talks are subject credit denial. **(5 business days for grand rounds)** | $ 75 (per speaker) | $ 100 (per speaker) |
| Registration list\* received less than 7 business days prior to the activity. | $ 500 | $ 625 |
| Exhibitor Agreement received less than 7 business days prior to the activity. | $ 50 (per agreement) | $ 65 (per agreement) |
| Letter of Agreements received less than 14 business days prior to the activity. **(sponsorship or educational grant)** | 2½%  14+ days before activity | 10%  9-13 days before activity |
| **Validity fee - Activities not planned with OCME’s involvement\***\***.** | **$800.00** | **$1000.00** |

**All fees are due at the time the application is submitted and is non-refundable.**

OCME staff expenses including, technology, travel, and accommodations will be paid for from the conference/activity budget.

\*Registration participant information – Name, affiliation, address, email, and credentials

Executed Exhibitor Agreements must contain the amount paid and signature.

\*\*Involvement means that the OCME is included/invited to all planning meetings either planned or impromptu.

USA Office of CME may withdraw credit from this activity without penalty, particularly since issues related to accreditation

compliance and content validity may only become apparent late in the activity development or deployment process.

Review Mitigation Form or more details. Examples of non-compliance would include ineligible company logos and slogans within a presentation.

**References / Resources**

[JA Commendation Criteria](https://www.jointaccreditation.org/commendation) [ACCME Standards for Integrity and Independence](https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce) [Joint Accreditation Criteria](https://www.jointaccreditation.org/joint-accreditation-criteria-0)

[University of South Alabama Mission](https://www.southalabama.edu/bulletin/current/general-info/mission.html) [USA Office of Continuing Medical Education Mission](https://www.southalabama.edu/colleges/com/cme/mission.html)

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|  | **University of South Alabama Office of CME**  **Activity Review Form**  **Education for the Team by the Team**  **Nothing About Us Without Us** |  |

**Activity**  Hours Requested       Hours Awarded

**Reviewer**       Approved Not approved Reason

|  |  |
| --- | --- |
| Completed / Attached | Requirement Comments |
| Yes No | All planner disclosures are signed/attached. **[JAC 12]** **(If no, DO NOT proceed)** |
| Yes No (page 2) | [Objectives](#Text1081) are clearly written. |
| Yes No (page 1) | Practice gaps are clear. **[JAC 4]** |
| Yes No (page 1) | Gap references / resources are provided. |
| Yes No (page 2) | Activity is designed for the team by the team. **[JAC 5]** |
| Yes No | Do you have any concerns about this application? |

|  |
| --- |
| This activity has been designed to impact changes in knowledge, performance, skills, competence, and/or patient outcomes and is  1. Approved for  Credit Hour(s) in *AMA/PRA Category 1 credit(s)*™. (opioid      )  2. Approved for  Credit Hour(s) ACPE (Pharmacist code       Pharmacy tech code      )  3. Approved for  Credit Hour(s) ANCC  4. Approved for  Credit Hour(s) APA (clinical      , general      , supervision      , ethics      )  5. Approved for  Credit Hour(s) BOC  6. Approved for  Credit Hour(s) CDR  7. Approved for  Credit Hour(s) MOC  8. Approved for  Credit Hour(s) NBCC  9. Approved for  Credit Hour(s) ASBSWE  This application has been reviewed and all necessary requirements have been met.  Sharrie D’Andrea Cranford  Signature acknowledging this application has been thoroughly reviewed.  CME Committee Member |

Notes / Suggestions

**ABA** MOC=American Society of Anesthesiologists

**ABIM** MOC=American Board of Internal Medicine

**ABOHNS** MOC=American Board of Otolaryngology

**ABOS** MOC=American Board of Orthopaedic Surgery – head/neck surgery

**ABP** MOC=American Board of Pediatrics

**ABPath** MOC=American Board of Pathology

**ABS** MOC=American Board of Surgery

**ACPE**=Pharmacy

***AMA PRA Category 1 Credit™***=Physician

**ANCC**=Nurse

**ASBSWE**=Alabama State Board of Social Work Examiners

**APA**=Mental Health Professional,

**BOC**=Athletic Trainer

**CDR**=Dietician

**NBCC**=Counselor

**APOST**=Alabama Peace Officers

**ASRT**=Alabama