

# Regularly Scheduled Series (RSS) Policies and Documentation Guide

I, Stacey Guichard, my spouse or partner, has no actual or potential conflict of interest in relation to this program or presentation.

# Purpose of RSS Documentation Guide

- The purpose of this RSS Documentation Guide is to facilitate the development and implementation of Continuing Medical Education (CME) activities to ensure that these activities comply with the guidelines of the Accreditation Council for Continuing Medical Education (ACCME) for certification of *AMA PRA Category 1 Credit™*.
- All of the necessary data forms required to implement your CME activity may be found on the Department of CME's website at <http://ochsner.org/cme>. This guide can also be found on the website.
- Ochsner Health System is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

# What is a Regularly Schedules Series (RSS)

- A RSS is a series with multiple sessions that occur on an ongoing basis (weekly, bi-weekly, monthly, or quarterly) and are primarily planned by and presented to the accredited organizations professional staff.
- Examples of activities that are planned and presented as a RSS are Grand Rounds, Tumor Boards, M & M Conferences, etc...

# RSS Policies

- **All** series coordinators **MUST** meet with a representative from the Department of CME annually. In the event that you are no longer going to be the series coordinator, please notify the Department of CME immediately with the name of the new contact person.
- The Department of CME will send out all series renewal notices. Notices will provide an application deadline, as well.
- Paperwork from each lecture **MUST** be received within **30 days** of the activity with all paperwork completed properly. The coordinator will be contacted to correct any deficiencies in the paperwork. Credit will not be awarded until the deficiencies are corrected.
- Series Coordinators are responsible for the logistics of the series. This includes, audio-visual, video-conference locations, meeting venues, etc...
- It is the responsibility of the series coordinator to get sign-in sheets to and from the video-conferenced locations.
- The Department of CME does not provide funding for RSS meals.

# Commercial Support

- Commercial support is monetary or in-kind contributions (i.e. equipment, supplies) given by a commercial interest that is used to pay all or part of the cost of a CME activity.
- **Approval must be received from the Department of CME prior to accepting the commercial support.**
- Once approved, a Letter of Agreement (LOA) must be completed each time commercial support is received and signed by the System Vice President of Education and the Pharmaceutical Representative.
- Commercial Support must be acknowledged on your promotional materials.
- Commercial Support must be made payable to Ochsner Clinic Foundation and mailed to the Department of CME, attention: Stacey Guichard

# Commercial Support cont'd...

- Commercial Support must never be paid directly to the speaker, caterer, etc.
- Commercial exhibits are promotional activities and must follow the Department of CME rules and regulations.
- Exhibits are to remain outside of the educational activity.
- **Commercial interest representatives are welcome to attend educational activities, provided they do not solicit support or ask questions in the educational session.**
- **Commercial interest representatives cannot bring in speakers for CME conferences.**

# RSS Application

- Go to <http://ochsner.org/cme>
- Select Regularly Scheduled Series and Live Activities, under Application Process, select “Complete the online Application”.
- Enter your email address and click “Log In for Conference Application Form”.
- Complete all information as indicated in the application.
- Select new application or a renewal application.
- **Please note:** The “Submit” button will not appear until all information has been completed.



# RSS Application

- New CME applications submitted for *AMA PRA Category 1 Credit™* will not be considered for approval without **ALL** required forms and documentation. The following is required:
  - ❑ Completed CME Application
    - ✓ Global objectives for the activity as whole
    - ✓ Needs Statement with supporting documentation
    - ✓ Disclosures (Activity Director, Planning Committee, Speakers)

# RSS Application

- Renewal CME applications submitted for *AMA PRA Category 1 Credit™* will not be considered for approval without **ALL** required forms and documentation. The following is required:
  - ❑ Completed Renewal Application
    - ✓ Practice Gaps
    - ✓ Learning Objectives
    - ✓ Disclosures (Activity Director, Planning Committee, Speakers)

# RSS Paperwork

## Series Documentation Checklist

- Must be completely filled out and attached to paperwork that is submitted
- Form A - Qualification Form (If applicable)
- Form B - Physician Sign-in Sheet
- Form C - Resident/Fellow Sign-in Sheet (If applicable)
- Form D - Other Learners Sign-in Sheet (If applicable)
- Form E - Evaluation (Electronic or Paper)
- Form F - Announcement/Email/Memo
- Form G - Disclosure Form (Attached or On File)
- CV/Bio - Non-Ochsner Speakers - **NO LONGER NEEDED**
- Disclosure Attestation

# RSS Paperwork

## Qualification Form (Form A)

- Must complete all information at the top of the form
- Must have a Purpose Statement
- Must have Learning Objectives
  - “Understand” cannot be used as a Verb
- References, if applicable

# RSS Paperwork

## Physician Sign-in Sheet (Form B)

- Must complete all information at the top of the form
- Names must be **PRINTED** legibly in order to receive credit
- It is recommended that names be typed on the sign-in sheets
- **MD's and DO's ONLY**
- In order to receive CME credit, the attendance sheet **MUST** be signed by participant.
- Those who attend via video-conference or phone, a check mark may be placed next to their name; however, the coordinator must have a statement on the sign in sheets indicating that they verify attendance for those with check marks.
- Participants on this sign-in sheet will receive *AMA PRA Category 1 Credit*<sup>TM</sup>
- If name is not on the sign in sheet, CME credit will **NOT** be awarded

# RSS Paperwork

## Resident/Fellow (Form C) & Other Learners (Form D) Sign-In Sheet

- Must complete all information at the top of the form
- Names must be **PRINTED** legibly in order to receive credit
- It is recommended that names should be typed on the sign-in sheets
- In order to receive CME credit, the attendance sheet **MUST** be signed by participant.
- Those who attend via video-conference or phone, a check mark may be placed next to their name; however, the coordinator must have a statement on the sign in sheets indicating that they verify attendance for those with check marks.
- Although participants on this sign-in sheet do not receive CME credit, their attendance is tracked as some disciplines require attendance.

# RSS Paperwork

## Evaluation Form (Form E)

### ➤ Electronic Evaluations

- Are done via Survey Monkey
- For lectures with changing learning objectives, evaluations are done after each lecture
  - ✓ Series Coordinator forwards the qualification form or the lecture date, speaker information, lecture title, and learning objectives via email to CME
  - ✓ CME creates the evaluation in Survey Monkey and forwards the evaluation link to Series Coordinator
  - ✓ Series Coordinator emails the evaluation link to participants
- For lectures with global learning objectives, evaluations are done **ONCE** a year
  - ✓ Coordinators should direct participants to CME's website to complete evaluations, [www.ochsner.org/cme](http://www.ochsner.org/cme)
  - ✓ Select the "Evaluations" tab on the right side of the page
  - ✓ Participants should complete evaluations for the lecture(s) that they have attended
  - ✓ Evaluations can be completed more than once, but not necessary

# RSS Paperwork

## Evaluation Form (Form E)

- Paper Evaluations
  - Must complete all information at the top of the form
  - Lecture objectives **MUST** be included
  - Evaluation forms are not mandatory for each participant
  - They must be distributed at each lecture
  - Participants do not have to write their name on the top of the evaluation form if they do not want to; however, if further clarification is needed based on a response given, this information is helpful
  - Coordinator must check with **CME** to ensure that the mandatory questions are on the evaluation
  - Coordinator must tally and compile comments on a blank form and forward that page and the evaluations with the paperwork



# RSS Paperwork

## Announcement (Form F)

- This form is a template
- If you would like to use another form or information is disseminated in an email, you must include all of the information that is found on the announcement template
- Posters must include the disclosure, accreditation, and designation statements
- Objectives can be added to posters, if space is available
- We must review all announcements that have pharmaceutical support before they are printed, e-mailed, etc.
- Please send us any questions about announcements or posters before it is distributed

# RSS Paperwork

## Disclosure (Form G)

- Speakers and all who are involved with content (planners) of the activity must complete a disclosure form
- Disclosures must be completed prior to the activity
- Disclosure information must be available for participants before the meeting
- Disclosure information must be given whether the speaker/presenter has or does not have a relationship with a commercial interest
- Disclosures for non-Ochsner physicians should be obtained 2 weeks prior to lecture
- The announcement template has 3 variations of disclosures that can be used (Only use the one that pertains to your speaker)
- Verbal disclosures are recommended; however, documented disclosures are required. **Any lecture where a documented disclosure is not made, indicates non compliance with ACCME guidelines; whereby, *AMA PRA Category 1 Credit*<sup>TM</sup> for that activity will not be given.**

# RSS Paperwork

## What to do if there is a Conflict of Interest (COI)?

- If there is a conflict of interest, the disclosure and the speaker presentation should be peer reviewed by the Activity Director **AND** forwarded to CME for review.
- If the Activity Director or the Department of CME finds that a conflict of interest exists, it will be resolved in the following manner:
  - ❑ The Activity Director can choose not to provide CME credit for the lecture or obtain another presenter
  - ❑ The Activity Director will ask the presenter to refrain from making recommendations on topics in which the conflict(s) exist
  - ❑ The presenter can renounce the relationship with the commercial interest
  - ❑ The presenter will attest in writing that the recommendations being made for clinical practice is based on data derived from multiple, randomized clinical trials or meta-analyses by disclosing this information to learners
- The Department of CME reserves the right to not award credit to any lecture that is deemed to have had a commercial bias.

# RSS Paperwork

## Disclosure Attestation

- ACCME requirement
- Informs learners prior to lecture, if the speaker has any conflict of interest
- Can be done in the following ways:
  - Flyer/Email/Announcement [Attach disclosure notification]
  - Speaker(s) slide [Attach notification slide only]
  - Verbally [Signature acknowledges disclosure attestation]

# What's Happening in CME

## Department of CME Website

- New look to our website
- Upcoming CME Activities
- RSS Forms
- RSS Calendar
- Clinical Experts List (Speaker's Bureau)
- Evaluations
- Online Transcripts are now available
  - ☐ <http://cmetranscript.ochsner.org/>
    - ✓ Log in by using the email address of the persons whose transcript is needed
    - ✓ Must be on an Ochsner network

# Contact Information

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