

# CME COURSE DIRECTOR GUIDELINES AND RESPONSIBILITIES

OFFICE OF CONTINUING MEDICAL AND PUBLIC EDUCATION

**CME COURSE DIRECTOR GUIDELINES AND RESPONSIBILITIES**

The mission of the Continuing Medical Education program at UT Southwestern is to promote the continued professional development of physicians to deliver the safest, highest quality, and most effective patient care. The program fulfills this mission by conducting appropriate assessments of learner needs and developing effective strategies to enhance physician performance.

While the ultimate adherence to the guiding principles rests with the sponsoring institution, you as the course director of the CME activity, take responsibility for the content, quality and scientific integrity of the CME activity.

Course Director Responsibilities include:

- Identifying the educational need and gap analysis to be addressed.
- Developing clear educational objectives based upon the identified gap.
- Selecting activity title, target audience and purpose.
- Selecting and confirming faculty for the event so that individually or collectively they provide current, objective, scientifically rigorous and expert coverage of the subject(s) at hand.
- Developing appropriate activity agenda tied to the educational objectives.
- Assuring balance in the content of the activity to reflect all legitimate perspectives on an issue, therapeutic approach, or use of a medical device.
- Participating in the mitigation and/or content review process of reported financial relationships with ineligible companies for all persons in control of activity content, prior to the activity date.
- Abiding by ACCME, and other applicable guidelines & regulations of the sponsoring institution.

In addition to the above duties, the course director will provide the CME program coordinator:

- The name and contact information for the activity faculty.
- The names of companies providing potential commercial support (educational grants and/or in-kind donations).
- The name and contact information for potential exhibitors.
- Guidance and direction on the variable activity costs, registration fees and marketing efforts.

**Fixed costs** associated with the accreditation of activities cannot be negotiated, as UT Southwestern requires the Office of Continuing Medical Education to recoup all such costs from departments utilizing its services. These fixed costs are outlined in the attached fee schedule.

**Variable costs**, such as venue rental, food, speaker fees, etc, are incurred at the discretion of the Course Director.

**Review and Approval CME Activity Income & Expense Statement**- **Two weeks prior to the start of each CME activity, the Office of CME will provide a copy of the Activity Income & Expense Statement (showing Fixed and Variable Costs) for course director review and approval.**

After approval of the Activity Income & Expense Statement, no changes shall be made without express written approval of the course director.

***As the Course Director, you are responsible for monitoring program expenses and directing CME staff in approved expenditures. As such, you are responsible for any expenses incurred for program activities***

**Financial Responsibility:**

CME-certified program fees include the following fees. **Certification Fees\*** are due at the time of application approval. All other fees are payable upon closeout.

**CORE SERVICE FEES** – All programs incur the following basic fees, based on the number of credit hours and/or audience size:

- \*Certification Fees
- Electronic Data Management
- Institutional Tax

**ADDITIONAL SERVICES**-The following services incur fees, as applicable

- Event Management
- Grant submission
- Exhibitor support
- Internet/Live Set up fee

       (initials) I acknowledge the 'Financial Responsibility' terms outlined above and that I am responsible for the financial outcomes of the activity. I understand that my department will be held liable in the event the activity incurs a financial loss.

       (initials)[Live/Online Events Only] I understand that upon approval of the CME application, we will be billed (per the chart of accounts listed below), for the applicable CME certification fees for live/online activities. These fees are non-refundable.

**Adherence to Timelines:**

       (initials) **Timelines:**

To ensure the success of the CME activity, the course director must adhere to the recommended program preparation time line. Deviation from the established time line may have a negative impact on the attendance and/or financial performance of the activity. Appropriate administrative fees will be charged if the program is cancelled.

**\*Where applicable**, if the activity will be held at an off campus location (hotel/conference center) a contract will be created between UT Southwestern and venue. The contract will be reviewed by the UT Southwestern Contracts Management Department. Should the situation arise in which your department chooses to cancel or reschedule the program, please know that penalty fees imposed by the hotel will be the responsibility of your department.

*(Note: this would not be applicable for situations in which hotel contracts are managed directly between non-UTSW applicants for Joint Providership & the hotel, as well as for UTSW certification-only events. In such cases, hotel contracts are managed by the Course Director, independent of the CME Office.)*

The FINAL CME activity Income & Expense Summary will be provided within 90 days of the completion of the activity.

*I understand my responsibilities and financial obligation as course director for this program.*

<b>Course Director</b> <i>(Please Print)</i>		<b>Signature</b>		<b>Date</b>	
<b>Department Chair</b> <i>(Please Print)</i>		<b>Signature</b>		<b>Date</b>	
<b>Department Administrator</b> <i>(Please Print)</i>		<b>Signature</b>		<b>Date</b>	

**Please complete the Chart of Accounts table below for the invoicing and/or deposits related to this activity.**

<b>Chart of Accounts</b>	
<b>Business Unit</b>	
<b>Oper Unit</b>	
<b>Dept</b>	
<b>Fund Type</b>	
<b>Source</b>	
<b>Function</b>	
<b>Purpose</b>	
<b>PC BU</b>	
<b>Project ID</b>	
<b>Activity</b>	

**ATTACHMENT A: Office of Continuing Medical and  
Public Education  
Administrative Fees for CME Activities**

## Office of Continuing Medical and Public Education Administrative Fees for CME Activities

(Effective for Activities on or after Sept. 1, 2020)

**LIVE (in-person and/or live streamed) Courses:** A course that is planned as an individual event and designated for credit as a single activity. These activities are often open to external physician participants. *Examples: annual meeting, conference, seminar, live streamed lectures, etc.*

### CME Certification Fees\*\* & Event Management Fees

\*\* Denotes Core Service Fees

Hours of Content	CME Certification	Event Management
5+ Contact Hours	\$4,000	\$5,000 (Up to 8 Contact hours)*
2-4 Contact Hours	\$3,000	\$1,000/hour
Less than 2 Contact Hours	\$2,000	N/A

\*\$500 per every contact hour over 8.

### Electronic Data Management Fees\*\*

Up to 25 attendees	\$1,500
25 to 100 attendees	\$2,000
100 to 250 attendees	\$2,500
Over 250 attendees	\$3,000

### Additional Fees

Internet LIVE-Set-Up Fee (if applicable)	\$250
Grant Management Fee (if applicable)	10% of all grants awarded
Exhibit Management Fee (If applicable)	15% of all exhibit fees collected
Specialty Application Fee (if applicable)	\$500 per application

**Enduring Material/Recorded Webinar:** An enduring material is a printed, recorded, or computer-presented activity that endures over a specified time and does not have a specific time or location designated for participation; rather, the participant determines whether and when to complete the activity. *Examples: Recorded lectures viewable online at a later time and followed by a post-test or assessment.*

### CME Certification Fees\*\*

Hours of Content	CME Certification
5+ Contact Hours	\$4,000
2-4 Contact Hours	\$3,000
Less than 2 Contact Hours	\$2,000

### Additional Fees

Internet LIVE-Set-Up Fee (if applicable)	\$250
Grant Management Fee (if applicable)	10% of all grants awarded
Exhibit Management Fee (If applicable)	15% of all exhibit fees collected
Specialty Application Fee (if applicable)	\$500 per application

### Electronic Data Management Fee\*\*

Enduring Material Flat Fee	\$1,500
----------------------------	---------

**PAYMENT POLICY FOR LIVE COURSES AND/OR ENDURING MATERIALS**

CME certification fees will be invoiced immediately following approval of the application. Any adjustments to projected credit amount and final agenda calculations will be deducted or credited as applicable on the activity financial closeout

**CANCELLATION/POSTPONEMENT POLICY FOR LIVE COURSES AND/OR ENDURING MATERIALS**

**Cancellation**

If activity is cancelled within 90-45 days prior to the scheduled event date, the Office of Continuing Medical Education will invoice the sponsoring department a pro-rated amount equal to 50% of original Event Management fee total (where applicable).

If activity is cancelled less than 45 days prior to the scheduled event date, the Office of Continuing Medical Education will invoice the sponsoring department a pro-rated amount equal to 75% of original Event Management fee total (where applicable).

At time of cancellation, the sponsoring department will be responsible for paying any fees accrued by the Office of Continuing Medical Education (to include previously paid deposits, any non-reimbursable expenses, and credit card processing fees for registration and/or refund, etc.).

**Postponement**

In the event of a course postponement, the Sponsoring Department will receive a financial closeout summary and be invoiced for any expenses accrued by the Office of Continuing Medical Education (to include previously paid deposits, any non-reimbursable expenses, and credit card processing fees for registration and/or refunds, etc.)

All registration revenue, grant income, and/or exhibit income collected will be carried over by the Office of Continuing Medical Education and will be credited to towards the activity balance so long as the activity takes place within 6 months of the originally scheduled date.

**Regularly Scheduled Series (RSS):** A course that is planned as a series with multiple, ongoing sessions, e.g., offered weekly, monthly, or quarterly; and is primarily planned by and presented to the accredited organization's professional staff. Typically, same interval of contact hours per session (1-2 contact hours) offered for each session. Examples: grand rounds, tumor boards, and morbidity and mortality conferences.

\*\* Denotes Core Service Fees

**CME Certification Fees\*\***

<b>RSS FREQUENCY</b>	
Monthly/Quarterly (2-12 times/yr.)	\$1750
Weekly (13-52 times/yr.)	\$2250

**Additional Fees**

<b>Grant Management Fee (if applicable)</b>	10% of all grants awarded
<b>Exhibit Management Fee (If applicable)</b>	15% of all exhibit fees collected
<b>Specialty Application Fee (if applicable)</b>	\$500 per application

**Electronic Data Management Fee\*\***

<b>Small RSS (25 attendees or less)</b>	\$1,500
<b>Large RSS (25 attendees or more)</b>	\$2,000
<b>'Bundled' Rate (multiple series, same audience)</b>	Applicable Rate from Above + \$500/each additional series

<b>CORE SERVICE FEES</b>	
<b>Service</b>	<b>Description</b>
<b>CME Certification</b>	<p><i>Partner w/Activity Director and course committee to certify that the activity format, goals, and objectives are designed to meet educational needs and meet all ACCME accreditation guidelines around CME design and development.</i></p> <ul style="list-style-type: none"> <li>• Ensure that CME application and required forms are completed &amp; returned to CME office in a timely fashion</li> <li>• Develop and/or review all promotional material for activity</li> <li>• Develop/Manage ACCME File and maintenance</li> <li>• Review speaker correspondence regarding CME</li> <li>• Compile all faculty disclosures</li> <li>• Syllabus preparation with CME required language</li> <li>• Coordinate prior approvals</li> <li>• Development and analyze the evaluation tool</li> <li>• Collect and maintain ACCME required reporting/data.</li> <li>• Manage CME Grant Applications for Commercial support (If applicable)</li> </ul> <p><b>NOTE: If accepting funds to defray costs of CME from medical device or pharma, Office of CME must manage all medical education grant for ACCME Compliance. See Grant Management Below.</b></p>
<b>Electronic Data Management</b>	Activity registration site set -up in LMS, administrative access for reporting, support for required electronic record documentation/maintenance, participant access to transcripts and/or certificates.
<b>Institutional Tax</b>	8% of all CME fees; This fee goes back to institution to pay for departmental assessment fees.
<b>ADDITIONAL FEES</b>	
<b>Event Management</b> <i>(Only available with Conferences with over 2.00 Contact hours)</i>	<p><i>Managing the logistics of the event: venue management; Listed below is a sample overview of tasks:</i></p> <ul style="list-style-type: none"> <li>• Manage Hotel Contract RFP process</li> <li>• Develop &amp; Manage of Conference Budget</li> <li>• Develop an Exhibitor prospectus</li> <li>• Manage the exhibitor documents, exhibitor registration, and exhibit space. See Exhibit Management fee below:</li> <li>• Arrange of Faculty Transportation and coordinate Learner Transportation (as necessary)</li> <li>• Assist with coordination of registration set-up/materials and management on site.</li> <li>• Manage all Venue/site issues/concerns; Point person for Venue</li> <li>• Develop and Manage Catering budget, Audio visual needs, room setups, etc.</li> <li>• Determine on-site staffing needs</li> </ul>
<b>Internet LIVE-Set-Up Fee</b>	Initial set up and ongoing management of online program (to include but not limited to): <ul style="list-style-type: none"> <li>• Live-stream/webinar initial set up</li> <li>• LMS (EthosCE) integration</li> <li>• Ongoing webinar customer support</li> </ul>
<b>Grant Management</b>	<p>10% of all awards. ACCME requires that accredited CME providers comply with the ACCME Standards of Commercial Support when accepting funds in support of accredited CME activities. <b>NOTE: If accepting funds to defray costs of CME from medical device or pharma, Office of CME must manage all medical education grants for ACCME Compliance.</b></p> <ul style="list-style-type: none"> <li>• Target appropriate potential grantors</li> <li>• Manage LOAs as necessary</li> <li>• Manage financial reconciliation with grantors</li> </ul>
<b>Exhibit Management</b>	<p>15% of all Exhibiting fees:</p> <ul style="list-style-type: none"> <li>• Create Exhibitor Prospectus with Course Director</li> <li>• Target potential exhibitors</li> <li>• Manage LOAs with exhibitors</li> <li>• Set up/Manage Exhibit Space on-site</li> <li>• Manage exhibitor payments</li> </ul>