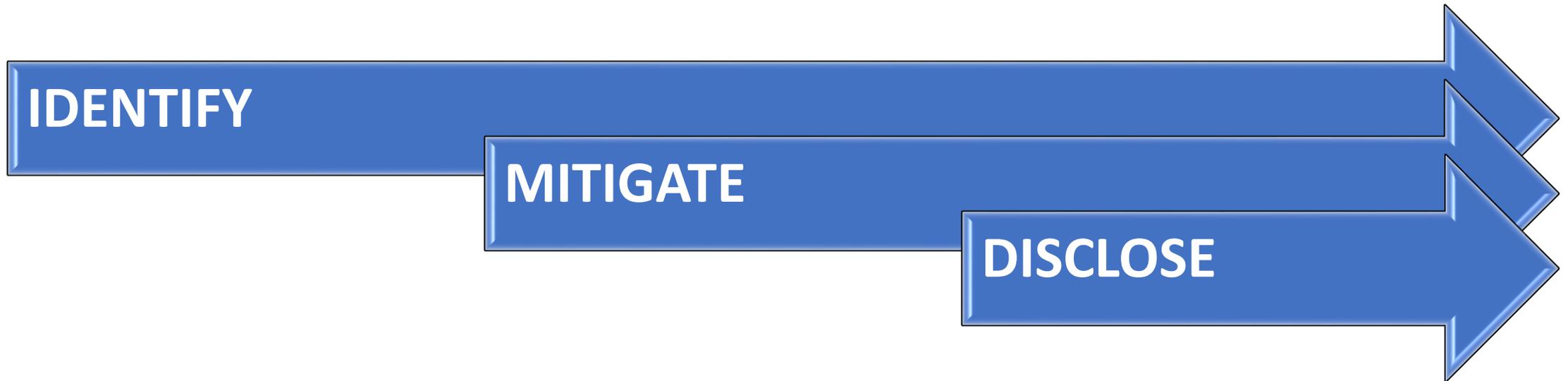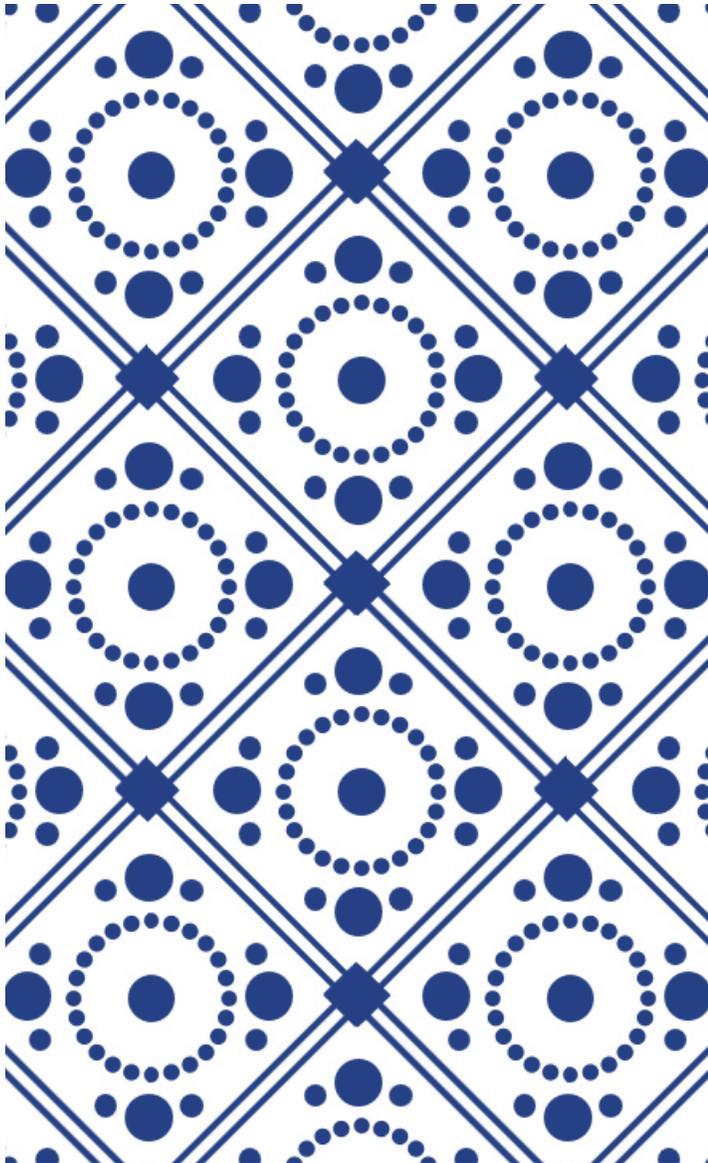# Grand Rounds New Coordinator Orientation

ACCME Guidelines on the Mitigation of Financial Relationships

All occurs **PRIOR** to the
delivery of accredited content!

So you want to have an RSS session...

RSS = Regularly Scheduled Series such as Grand Rounds

Process Overview

When	SharePoint	Ethos
2 weeks* prior-to session	Request session by creating session folder *Requests for earlier course page generation comm via email*	
2 weeks prior-to session		Course link sent by CME Office *TIP: Save link email to Outlook task list to make tracking easier!*
As soon as you get the link! (5-10 business days prior-to session)		Add faculty for the individual session (speakers, moderators, etc) to course link
Continuous		Track disclosures for completion on course page
As soon as possible – MINIMUM 5 business days prior-to session		**Notify CME office of any conflicts as soon as possible for mitigation**
3 business days prior-to session	Once all disclosure information has been obtained, upload DTL and Announcement, Speaker Release form (as applicable)	
2 business days prior-to session	Event ID number emailed to you once all pieces are confirmed 2 days ahead of session *ALL items expected to be completed by this time*	
Day of session	Provide Event ID, Announcement, DTL to learners	

1) Request RSS Session by creating session folder in SharePoint

- **Complete 2 weeks prior-to session**
- Create session folder in SharePoint
- This confirms there is a session and serves as our cue to create a course link
- CME Office will send course page link via email
- Helpful to have announcement at this point (for variable hour activities)
- Early requests accepted by email (up-to 2 months in-advance)
  - Visiting speakers
  - Complete steps listed above prior to sending request

2) Course link email

- Contains working link for that upcoming session

- **Tip! Save that email as a task in Outlook** so it's easily accessible to go back to in order to track the progress of your faculty completing their disclosure form.

- Each session has a unique link

- Process reminders in email

The course page for RSS session 116-090821 has been created at the link below:
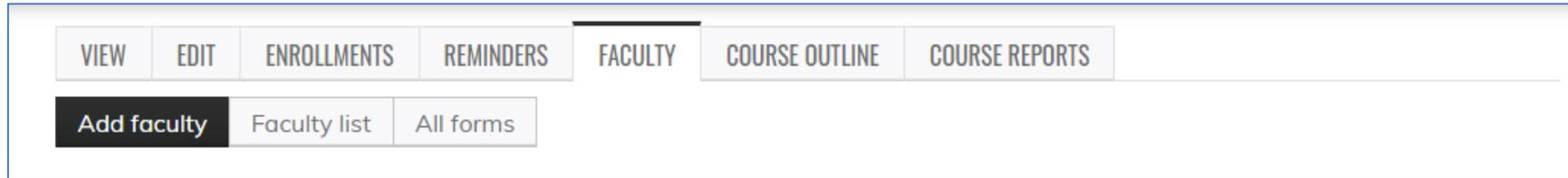
https://cme.utsouthwestern.edu/116-090821

Here is the Course link creation and certification process . Please see the following instructions:

1. Upon receipt of the Session Course link, please promptly add the Faculty so that the disclosures can be collected
2. Notify the CME office of any reported financial relationships/potential conflicts of interest
3. Upload the Announcement and DTL to SharePoint to request review/approval and release of Event ID
4. The day of the session, you can use either or a combination of the 2 options below for disclosing the required documents to your attendees:
   a. Email the Announcement, DTL, and the Event ID to your regular attendees about 1 hour prior to the session start time
   b. Convert both files into PPT slides and include at the beginning of the PPT presentation

*Please remember if a session folder is not created in SharePoint at least 2 weeks in advance, our office will assume you are not holding a session

3) Add faculty to course page faculty list in Ethos

| VIEW | EDIT | ENROLLMENTS | REMINDERS | FACULTY | COURSE OUTLINE | COURSE REPORTS |

Add faculty | Faculty list | All forms

- **Add faculty to course page link**
- *Who?* Anyone who contributes to the educational content
  - Speakers, Course Directors, Planning Committee members, Moderators
- *When?* As soon as you receive the course page link
- Assign Faculty Forms (Disclosure Attestation)
  - **Follow-up with faculty as-needed**
    - Edit disclosure link: https://cme.utsouthwestern.edu/my/edit/disclosure
  - Monitor disclosure form completion in faculty list

Build faculty list in Ethos (Add Faculty)

- Search by User's Name (First Last)

- New users (such as visiting speakers) who do not have a profile: add by email

- Assign faculty role within the grand rounds session

- Disclosure Attestation form
  - Sends a system-generated email from cmeregistrations@utsouthwestern.edu
    - Follow-up!
  - **No form = no email**
    - Can be beneficial for people you are adding for every session, such as Course Directors

Disclosures in Ethos

Updating Ethos disclosures

Best Option: Send direct link to update disclosure

➡ https://cme.utsouthwestern.edu/my/edit/disclosure

Check Yes or No, then 'SAVE'

DISCLOSURE *

Do you have any financial relationships with ineligible companies to disclose within the past 24 months? Disclosure should include relationships in any amount.

◉ No, I have not had a financial relationship with an ineligible company within the past 24 months.

○ Yes, I have had a financial relationship with an ineligible company within the past 24 months.

Disclosures in Ethos

- ***Who? Anyone contributing to educational content for the activity***
  - Course director, planning committee, speakers, moderators, peer reviewer
- Disclosure expiration check and how often are updates needed?
  - Implemented new ACCME Standards in our system on 11/11/21: **any disclosures dated before 11/11/21 will need to be renewed**
  - Updates should be made to disclosure form every time there is a change to their financial relationships
- Disclose ANY financial relationships with ACCME-defined ineligible companies

4) Track disclosure form completion progress on the course page faculty list (Reviewing Disclosure Date)

	First name	Last name ▲	Role	Email	Disclosure date	Published	Enrolled	Relation	Delete	Forms
☐	Pietro	Bajona	Speaker		10/01/2018	No	No	Edit	Delete	List
☐	Robert	Jaquiss	Speaker		10/01/2018	No	No	Edit	Delete	List
☐	Scott	Reznik	Course Director, Speaker		10/02/2018	No	No	Edit	Delete	List

- Look to see if there is a date in the "Disclosure date" column on the Faculty list tab.
- No date means they haven't completed their forms.
- Date prior-to 11/11/21 will need to be renewed
- **Follow up with course faculty to complete their disclosure forms**

4) Track disclosure form completion progress on the course page faculty list (New users)

	VIEW	EDIT	FACULTY	COURSE OUTLINE	ENROLLMENTS	COURSE REPORTS

Add faculty | **Faculty list** | All forms

NAME

ROLE
- Any -   **APPLY**

OPERATIONS

ENROLL FACULTY   **MODIFY PUBLISHED STATE**   **SEND E-MAIL**   **UNENROLL FACULTY**   0 rows selected

	First name	Last name ▲	Role	Email	Disclosure date	Published	Enrolled	Relation	Delete	Forms
☐	Pietro	Bajona	Speaker		10/01/2018	No	No	Edit	Delete	List
☐	Robert	Jaquiss	Speaker		10/01/2018	No	No	Edit	Delete	List
☐	Scott	Reznik	Course Director, Speaker		10/02/2018	No	No	Edit	Delete	List

- No name = No profile, disclosure not completed yet (If added by email)

- If they receive an error, doublecheck their email by searching for them by name again in "Add Faculty:" this will pull up the profile they created. Assign faculty form and resend the disclosure link

4) Track disclosure form completion progress on the course page faculty list (Review disclosure form)

Review disclosure form

To view if they have a conflict of interest or not, you will need to click on their name in the faculty list table and view their disclosure forms in their profile.
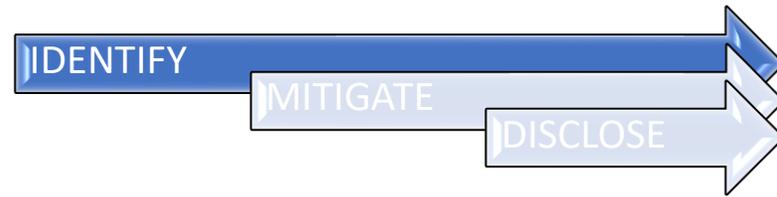
Disclosure form review

With Financial Relationship listing

Without Financial Relationship listing

| PROFILE | BIO | DISCLOSURE |

FINANCIAL RELATIONSHIPS

Yes, I have had a financial relationship with an ineligible company within the past 24 months.

FINANCIAL RELATIONSHIPS:

ATTRIBUTION:
Self

TYPE OF FINANCIAL RELATIONSHIP:
Stock

INELIGIBLE COMPANY:
nfosys

TOPIC:
minimally invasive monitoring of spinal cord blood flow

| PROFILE | BIO | DISCLOSURE |

## FINANCIAL RELATIONSHIPS

No, I have not had a financial relationship with an ineligible company within the past 24 months.

Notify CME

5) Notify OCME Admin of any listings on disclosure form

- What is a financial relationship with an ineligible company?
  - The ACCME defines an "ineligible company" as those whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients.
  - Occurring within the past 24 months
- Office of CME Program Coordinators manages mitigation process
- **Notify CME Program Coordinator of any financial relationship listings at least 1 week prior-to session**
- Peer reviewer assigned to mitigate financial relationships
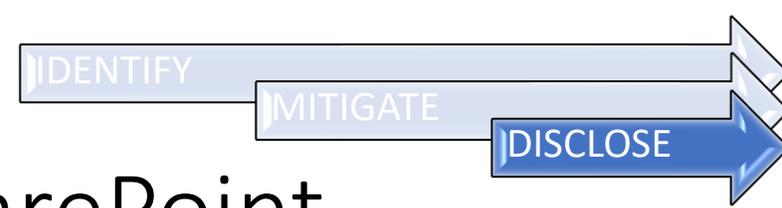
6) Upload RSS documentation to SharePoint

- **3 days prior-to session**

- Upload Announcement, DTL
  - Follow naming convention: RSS#_Date_Announcement

- Speaker Authorization Release form
  - All external speakers

- Other items as applicable
  - MOC, Journal Club post-test, Ethics approval

- **CME Office reviews all materials for completion 2 business days prior-to session**

DISCLOSE

Mechanism: Disclosure To Learner (DTL) handout/signage

Who: Distributed to *Learners*

When: *Prior* to Content Delivery

- **Transcribe information from online disclosure form**
- Matches faculty list

DISCLOSURE OF FINANCIAL RELATIONSHIPS WITH INELIGIBLE COMPANIES

RSS Title
Day, Date

It is the policy of the CME Office at The University of Texas Southwestern Medical Center to ensure balance, independence, objectivity, and scientific rigor in all directly sponsored or jointly provided educational activities. In accordance with the Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and independence in Accredited Continuing Education, all persons in the position to control the content of an education activity are required to disclose all financial relationships in any amount occurring within the past 24 months with any ineligible company (any entity whose primary business is producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on patients). UT Southwestern also considers ineligible those companies producing, marketing, selling, re-selling, or distributing healthcare products in development for future use on patients, such as healthcare product research companies. All reported financial relationships with ineligible companies are reviewed for relevancy and then mitigated through a content review process prior to the activity (where applicable).

The following is a listing of all individuals that contributed to the educational content of this activity and any reported financial relationships within the last 24 months:

NAME	ROLE	RELATIONSHIP	COMPANY
John Doe, MD	Course Director	None	N/A
Kimberly Jones, MD	Speaker	Speaker's Bureau	Pushy Drug Rep Pharmaceuticals
		Employment	Medtronics
	Speaker		
	Planner		
	CME Staff		

DISCLOSE

Mechanism: Announcement

Who: Distributed to *Learners*

When: *Prior* to Content Delivery

- Create template for your activity
- **Update session details at top**
- First half of form
  - Overall activity information from annual CME application
- Second half of form
  - CME language (do not change/delete)
  - Credit hours

Department Name
RSS Title
Day, Date
Time
Location

Presentation Title
Speaker Name
Title/Affiliation

Course Director: [Course Director Name]

Purpose and Content
Background and need for activity

Target Audience
Those for whom activity planned

Educational Objectives
At the conclusion of this activity, the participant should be able to:
1. Overall teaching objective(s) for activity
2. List the specific learning objectives for participants

Educational Method
Format and teaching methods

Accreditation: The University of Texas Southwestern Medical Center is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

Credit Designation: The University of Texas Southwestern Medical Center 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.

Relevant Financial Relationships: In accordance with the Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accrediting Continuing Education, all persons in the position to control the content of an education activity are required to disclose all financial relationships in any amount occurring within the past 24 months with any ineligible company (any entity whose primary business is producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on patients). UT Southwestern also considers ineligible those companies producing, marketing, selling, re-selling, or distributing healthcare products in development for future use on patients, such as healthcare product research companies. All reported financial relationships with ineligible companies are reviewed for relevancy and then mitigated through a content review process prior to the activity (where applicable).

Speaker Authorization Release Form

- Guidance from UTSW Legal Department:
  - Required for ALL external speakers (Non-UTSW) - DO NOT USE FOR UTSW SPEAKERS
  - Required if live streaming and/or recording of lectures
  - If revisions to the form are requested, they will have to be reviewed and approved by UTSW Legal Department
  - If the Speaker is not agreeable to all of these terms, they cannot present.

- NOT A CME FORM

SPEAKER AUTHORIZATION FOR USE OF IMAGE, VOICE, PERFORMANCE OR LIKENESS FOR EDUCATIONAL PURPOSES
The University of Texas Southwestern Medical Center

I, _____ (print name), permit and authorize UT Southwestern Medical Center ("UT Southwestern") and personnel who are acting on behalf of UT Southwestern, to create, obtain and/or use my name, photograph, audio or video recording or myself, my likeness, voice, and/or presentation materials (hereinafter collectively referred to as "My Likeness"), taken or made during a UT Southwestern seminar or presentation on or about _____ solely for instructional and/or educational purposes related to the educational mission of UT Southwestern. I agree UT Southwestern will have ownership of such materials, including the copyright, and the irrevocable, perpetual, and unrestricted right and permission to take, use, re-use, publish, and republish My Likeness, through any medium, including print media and the Internet, and in any and all media now or hereafter known. I acknowledge that UT Southwestern has the right to edit My Likeness, including without restriction any changes or alterations as to color, size, shape, perspective, context, foreground or background. I hereby waive any right that I may have to inspect or approve the finished product or products that may be used in connection with them or the use to which they may be applied.

I acknowledge that I will not receive any compensation for the use of My Likeness.

I may revoke this authorization at any time, except to the extent UT Southwestern has relied on this authorization, by sending a written statement of revocation that specifically refers to this Authorization to:

Office of Continuing Medical Education
UT Southwestern Medical Center
5323 Harry Hines Boulevard
Dallas, TX 75390-9059

I hereby release UT Southwestern from any and all claims which arise out of or are in any way connected with such use, dissemination, reproduction, distribution, and/or display of My Likeness and I hereby release, discharge, and agree to hold UT Southwestern and its agents and assigns harmless from any liability. I hereby warrant that I am of full age and have the right to contract in my own name. I have read the above authorization, release, and agreement, prior to its execution, and I have understood the contents. This Authorization shall be binding upon me and my heirs, legal representatives, and assigns.

I give my consent to UT Southwestern Medical Center to use My Likeness as described herein.

Print Name: _____

Signature: _____ Date: _____

For Internal Use Only

Event Title: _____
Client: _____
Producer: _____

Process Overview

When	SharePoint	Ethos
2 weeks* prior-to session	Request session by creating session folder *Requests for earlier course page generation comm via email*	
2 weeks prior-to session		Course link sent by CME Office *TIP: Save link email to Outlook task list to make tracking easier!*
As soon as you get the link! (5-10 business days prior-to session)		Add faculty for the individual session (speakers, moderators, etc) to course link
Continuous		Track disclosures for completion on course page
As soon as possible – MINIMUM 5 business days prior-to session		**Notify CME office of any conflicts as soon as possible for mitigation**
3 business days prior-to session	Once all disclosure information has been obtained, upload DTL and Announcement, Speaker Release form (as applicable)	← **DOCUMENT DEADLINE IN ORDER TO ASSURE SESSION CERTIFIED**
2 business days prior-to session	Event ID number emailed to you once all pieces are confirmed 2 days ahead of session *ALL items expected to be completed by this time*	
Day of session	Provide Event ID, Announcement, DTL to learners	

Process Reminders: When is it due? (Ethos upload)

ALL Materials due!	CME Review	Session
Wednesday before	Thursday before	**Monday**
Thursday before	Friday before	**Tuesday**
Friday before	Monday	**Wednesday**
Monday	Tuesday	**Thursday**
Tuesday	Wednesday	**Friday, Sat/Sun**

3 bus. Day before	2 bus. Day before	1 bus. Day before	Day of Session
Materials due!	CME review		Session
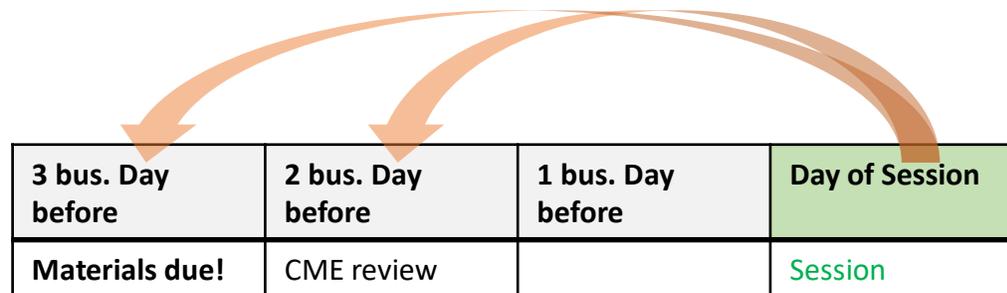
6) Provide Event ID, RSS documentation to learners

- Confirmed faculty forms, disclosures completed
- Announcement, DTL uploaded
- Receipt of Event ID number from CME Office
- **Provide Event ID, Announcement, DTL to learners prior-to session**
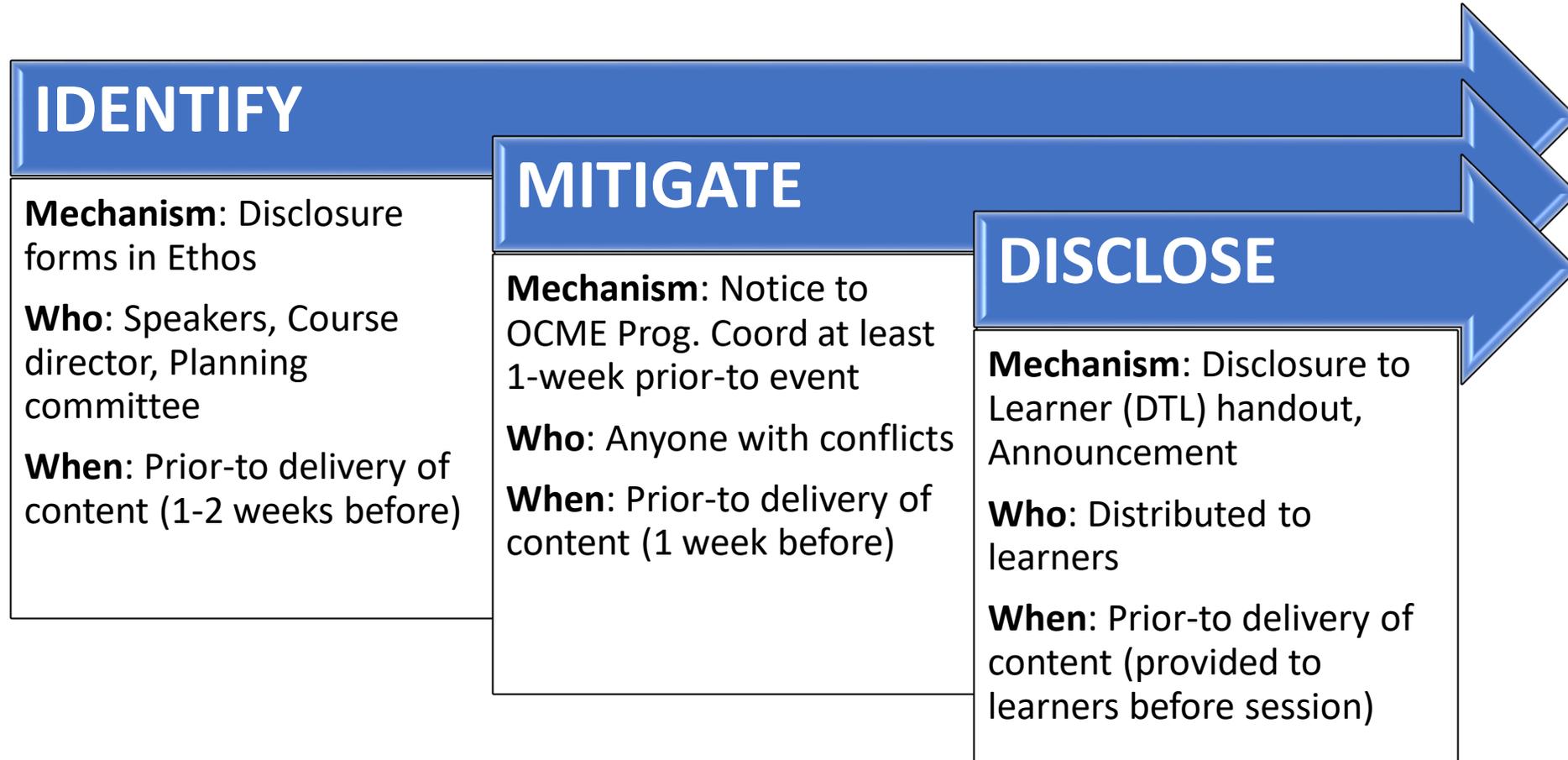
Sign-in to receive CME credit

TEXT <mark>\<Event ID\></mark> to 972-573-8343

or log in and enter at **cme.utsouthwestern.edu/code**
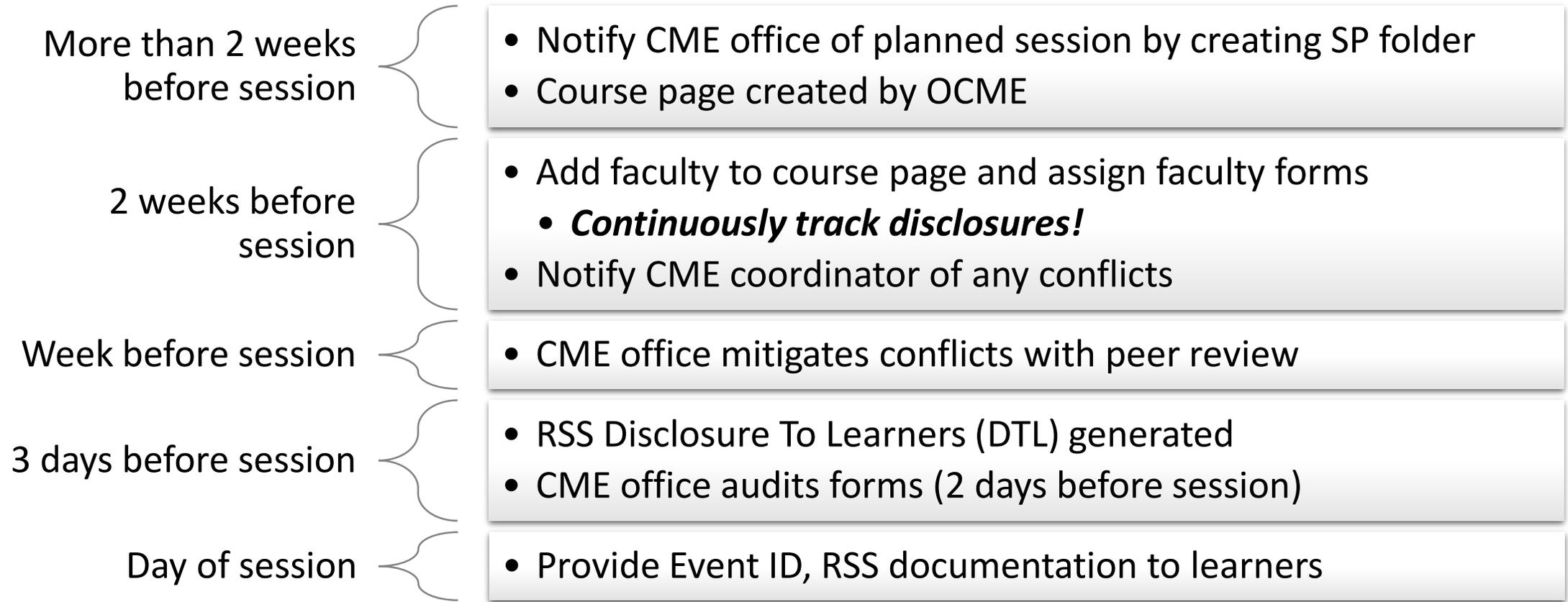to receive CME or attendance credit for this session.

The Event ID is available ***today only***.
You will receive a message confirming your attendance

UT Southwestern
Medical Center

ACCME Guidelines on the Mitigation of Financial Relationships

IDENTIFY

Mechanism: Disclosure forms in Ethos

Who: Speakers, Course director, Planning committee

When: Prior-to delivery of content (1-2 weeks before)

MITIGATE

Mechanism: Notice to OCME Prog. Coord at least 1-week prior-to event

Who: Anyone with conflicts

When: Prior-to delivery of content (1 week before)

DISCLOSE

Mechanism: Disclosure to Learner (DTL) handout, Announcement

Who: Distributed to learners

When: Prior-to delivery of content (provided to learners before session)

All occurs **PRIOR** to the delivery of accredited content!

Process Summary

More than 2 weeks before session
- Notify CME office of planned session by creating SP folder
- Course page created by OCME

2 weeks before session
- Add faculty to course page and assign faculty forms
  - ***Continuously track disclosures!***
- Notify CME coordinator of any conflicts

Week before session
- CME office mitigates conflicts with peer review

3 days before session
- RSS Disclosure To Learners (DTL) generated
- CME office audits forms (2 days before session)

Day of session
- Provide Event ID, RSS documentation to learners

Can I get a copy of the slides?

https://cme.utsouthwestern.edu/rss-coordinator/

Links

SharePoint	Look for "welcome" email from site and save the link! https://365utsouthwestern.sharepoint.com/sites/cme/SitePages/Home.aspx
Ethos Homepage	cme.utsouthwestern.edu
Resource page	https://cme.utsouthwestern.edu/rss-coordinator
Link to use in follow up with faculty	https://cme.utsouthwestern.edu/my/faculty-relationships
Link to UPDATE disclosure on file	https://cme.utsouthwestern.edu/my/edit/disclosure

Demo