



INSTITUTE FOR  
INTERNATIONAL  
MEDICINE

***Continuing Education Department***

The Institute for International Medicine is accredited by the Missouri State Medical Association to provide Continuing Medical Education for physicians.

**GUIDE TO CONTINUING MEDICAL EDUCATION COMPLIANCE:** Regularly Scheduled Series (RSS) Activity

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## **GUIDE TO CME COMPLIANCE**

### **REGULARLY SCHEDULED SERIES (RSS) ACTIVITY**

This overview is intended to inform Activity Coordinators regarding INMED Policies and Procedures for Regularly Scheduled Series (RSS) Activities such as Case Conferences, Morbidity & Mortality Conferences, Journal Clubs, Tumor Boards, or Grand Rounds. These policies and procedures ensure INMED meets all guidelines and standards set forth by its governing bodies. This overview is intended to help summarize and reinforce the agreement between INMED and the joint-provider; the formal agreement on file will supersede any items noted/un-noted in this overview.

#### **A. Establishing an RSS Activity**

There are four key items to establish an activity for accreditation: 1) an Activity Development Guide, 2) a Disclosure from each Planning Committee Member, 3) a schedule of activities for the year, and 4) a Credit Claim Form.

##### **1. Activity Development Guide**

The Activity Development Guide (ADG) establishes the activity in INMED's system and is the first document reviewed for formal approval for the Continuing Medical Education event. This form requests basic contact information for the Activity Medical Director and Activity Coordinator (admin support for activity), along with Planning Committee contact information, Global Objectives, and other reporting informational needs. The Activity Development Guide is the reference document used throughout the planning of the activity.

##### **2. Disclosures from Planning Committee Members**

A disclosure must be on file for all people in a position to influence the activity (including but not limited to the Activity Coordinator, Moderators, Planning Committee Members, Presenters/Speakers, and anyone completing INMED's Continuing Medical Education checklist). There must be at least two physicians on the Planning Committee. If there are not, please seek guidance from INMED. INMED requires disclosures to be updated at the end of every calendar year, every 12 months, or if a person's financial relationships with ineligible companies have changed.

### 3. Schedule of Activities

INMED uses the ADG to collect basic schedule information for activities and enters them into our transcript data base. This information is critical to help us with billing and for learners to be able to claim credit if they forget to claim on the Credit Claim Form on-site. If there is no set schedule (for example: every Monday or every third Thursday), then some set of expected activity dates should be provided to INMED for the year. If for any reason an activity is canceled or rescheduled, please contact INMED to inform of the change/cancellation prior to the activity date to prevent incurred fees for the activity.

### Activity Approval

After all disclosures have been collected and INMED's Review Committee has approved the ADG, the Credit Claim Form will be finalized and sent to the Activity Coordinator.

### 4. Credit Claim Form – Tips for Compliance

- a. The header portion should only be edited by INMED with the exception of the date field. Please do not remove the INMED Representative's name from the Planning Committee.
- b. If a change to the Planning Committee needs to be made, contact INMED directly to help facilitate the process.
- c. Learner names can be added or removed at any time by the Activity Coordinator. We ask that when changes are made the updated document be sent to INMED so if we need to modify the CCF at any time we'll have the most recent list of learner names.

## B. Documentation Needed for Date Specific Activities

1. Case Conference (CC)/Morbidity & Mortality (M&M)/Tumor Board (TB) Case Conferences, M&M's, Tumor Boards, and any patient case-based discussion conference.
  - a. Pre-Activity: No pre-activity documentation is needed for Case Conferences. Once an activity has been established for the year, a Credit Claim Form will be provided for use with each activity. Ensure all planners on the CCF are accurate and accounted for. Should there be a change in moderator, please notify INMED *prior* to the activity, request a disclosure submission from the alternate moderator, and ensure CCF provided by INMED has current and accurate information. Continuing Medical Education cannot be issued if proper disclosures are not noted on activity CCF or if an outdated CCF is used.
  - b. Post-Activity: *submit within 4 weeks of activity*
    - i. Continuing Medical Education Checklist
      - Ensure the CME checklist submission provides Educational Reporting (Q8) which can be written directly on the checklist form or provided on agenda with discussion notes or meeting minutes.
    - ii. Credit Claim Form
      - Ensure each physician who initials the form claims a credit amount and includes their email address. This is needed for compliance.
      - If learners attend online/virtually, please write "Remote" where they would typically write their initials and claim a credit amount on their behalf.

## 2. Journal Club (JC)

- a. Pre-Activity: submit at least 1 week *prior* to activity
  - i. Article(s) to be reviewed
  - ii. Presenter disclosure, if not already on the Credit Claim Form Header. Once the Activity is approved by the Review Committee, the date-specific Credit Claim Form will be sent by INMED.
  
- b. Post-Activity: submit within 4 weeks of activity
  - i. Continuing Medical Education Checklist: You may disregard the Educational Reporting (Q8) question because the article(s) was/were approved prior to activity and the information can be pulled from the article(s).
  - ii. Credit Claim Form: Ensure each Physician who initials the form claims a credit amount and includes their email address. This is needed for compliance.
  - iii. If learners attend online/virtually, please write "Remote" where they would typically write their initials and claim a credit amount on their behalf.

### 3. Grand Round (GR)

- a. Pre-Activity: submit at least 1 week prior to activity
  - i. Presentation to be reviewed by INMED Review Committee  
NOTE: Please request all Grand Round speakers to include a disclosure slide at the beginning of their presentation. If they do not have any disclosures, they should note that on the slide.
  - ii. Two to three (2-3) learning objectives
  - iii. Presenter disclosure and CV, if not already in INMED system (check with INMED prior to requesting submission of disclosure/CV to ensure it's not already on file)
  - iv. Once the activity is approved by the Review Committee, your date-specific Credit Claim Form will be sent to you by INMED.
  
- b. Post-Activity: submit within 4 weeks of activity
  - i. Continuing Medical Education Checklist  
You may disregard the Educational Reporting (Q8) question because the presentation was approved prior to the activity and information can be pulled from the presentation.
  - ii. Credit Claim Form  
Ensure each physician who initials the form claims a credit amount and includes their email address. This is needed for compliance.
  - iii. If learners attend online/virtually, please write "Remote" where they would typically write their initials and claim a credit amount on their behalf.

## C. Staying Compliant with Activity Announcements and Agendas

1. Activity Announcements: INMED must review and approve any activity announcements *prior* to the activity. An announcement template can be created at the establishment of the activity and can be used for the remainder of the year if approval of the template is granted by INMED.
2. Accreditation Statement: The following accreditation statement must be included in all program materials, in both print and electronic formats (e.g., a course syllabus, enduring material publication, landing page of an internet activity), that reference CME credit. Please note, "AMA PRA Category 1 Credit(s)"™ is trademarked and needs to be *italicized* as shown below to meet ACCME guidelines.

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Missouri State Medical Association through the joint providership of Institute for International Medicine (INMED) and <<host institution name>>. The Institute for International Medicine is accredited by the Missouri State Medical Association to provide continuing medical education for physicians.

Institute for International Medicine designates this <<learning format>> for a maximum of <<number of credits>> *AMA PRA Category 1 Credit(s)*™. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

3. Announcements/Agendas – Tips for Compliance
  - a. For Activity Coordinators of CC or M&M, it may be easiest to use an agenda as the announcement.
  - b. For Activity Coordinators GR, refrain from using objectives in announcements. If objectives are used, please submit to INMED 1 week *prior to distribution* for approval of objectives.
  - c. Please add the INMED Representative to the Announcement Distribution List.

## D. Learners Certificates / Transcripts

1. INMED provides continuing education for physicians only. However, non-physician learners can request a Certificate of Completion noting the amount of *AMA PRA Category 1 Credit(s)*<sup>™</sup> that were provided, but the certificate is an attendance record only. If non-physicians want a Certificate of Completion, they simply need to initial the CCF
2. The following instructions may be provided to all learners who want a certificate or Certificate of Completion:

You can access your Continuing Medical Education Certificate/Transcript by logging into <http://inmedce.com>

Username = Enter the email you provided on the Credit Claim Form  
Password = First letter of your first name in uppercase followed by your last name in lowercase. For example: John Smith would be "Jsmith". If this password doesn't work, you can click forgot password option for resetting – just be sure to check your spam/junk folder should the reset email be directed there by accident.

We recommend using either Google Chrome, Mozilla Firefox, or Apple Safari browsers to login to the INMED Credit site.

Please do not hesitate to contact INMED if you have any questions. INMED will keep your Certificate on file for 7 years. During that time, please contact [cme@inmedce.com](mailto:cme@inmedce.com) if you need any assistance.



## E. General Accreditation and Miscellaneous Information

1. Commercial Support  
INMED does not allow Regularly Scheduled Series (RSS) activities to obtain commercial support.
2. Honorarium  
Should a speaker be provided an honorarium for speaking at a Grand Round, the transaction will need to be included in an Income/Expense Report submitted to INMED at the end of the calendar year. The report needs to include the amount of the honorarium and from what fund the money came.
3. Income / Expense Report (Grand Round Only)  
At the end of the calendar year, all Grand Round activities must submit an Income/Expense Report.
4. Activity Coordinator Resource Page  
Visit the Activity Coordinator Resource Page for all form links and resource tools/guides.

## F. Statement of Understanding

**I have read the above Guide to Compliance and understand the INMED provided policies and procedures.**

**Activity Coordinator Electronic Signature**

**Date**

**Name of Activity(ies) you oversee**

**Submit signed form by clicking Submit button:**

