



Physicians' Institute
for EXCELLENCE IN MEDICINE
Improving medical practice for physicians and their patients

**CME Joint Sponsorship of Educational Activities
2008 Application Information**

The Physicians' Institute for Excellence in Medicine, Inc. (Physicians' Institute) is pleased to offer your organization an opportunity for joint sponsorship of the continuing medical education (CME) activity you are planning.

The first step in the process is to carefully read the information provided in the attached Joint Sponsorship Planning Guidelines and complete the Joint Sponsorship Application Form including a \$100 application fee. Once the Physicians' Institute CME Committee reviews the initial application and approves the Physicians' Institute to work with your organization, you will be contacted by a staff member to plan the next steps for planning the activity and gathering all the required documentation

The following pages outline the steps to be followed. Please contact the Physicians' Institute at any time during the planning process if you have questions.

Adele Cohen, Executive Director
Physicians' Institute for Excellence in Medicine
1849 The Exchange
Atlanta, GA 30339
678-303-9287 direct
678-303-3732 fax
acohen@physiciansinstitute.org

Physicians' Institute for Excellence in Medicine, Inc.

Development of a Joint Sponsored Educational Activity

Planning Guidelines

The Physicians' Institute for Excellence in Medicine, Inc. (Physicians' Institute) is a not-for-profit subsidiary of the Medical Association of Georgia. The mission of the *Physicians' Institute* is to improve patient safety and achieve clinical improvements for physicians and their patients. The Physicians' *Institute* focuses on activities to support physicians, including educational programs and tools in addition to sponsoring applied studies to assess the effectiveness of practices and processes in the physician office. The *Physicians' Institute* will consider joint sponsorship of any educational activity for physicians that advances the *Physicians' Institute* mission.

The Physicians' Institute is accredited by the Medical Association of Georgia to plan educational meetings for physicians. As such, we comply with the Accreditation Council of Continuing Medical Education (ACCME) [Essential Areas and their Elements](#), including the [Standards for Commercial Support](#) when planning educational activities jointly sponsored with non-accredited organizations. We also fully adhere to the AMA PRA category 1 requirements, and the AMA ethical opinions on gifts to physicians from industry and on ethical issues in CME. When considering joint sponsorship, the Physicians' Institute will work in partnership with you to ensure these requirements are met.

Specific Physicians' Institute guidelines include the following:

- [Applicants required to participate annually in CME bi-annual training webinar provided by the Physicians' Institute or CME providers meeting](#)
- [CME activities limited to Georgia and contiguous states](#)
- [CME activities limited to two per organization per year](#)
- [Required data and reports must be provided to the Institute within 60 days](#)

The Physicians' Institute accepts applications for joint sponsorship of educational activities for CME credit. Here are tips to remember when contemplating applying for joint sponsorship:

- The CME activity is planned for physicians with physician input. Ideally, the planning committee includes a physician.
- The content of the activity should be within the Physicians' Institute CME mission. [Click here to view Physicians' Institute mission statement.](#)
- As a subsidiary of the Medical Association of Georgia (MAG), we request that a MAG member be identified to act as the MAG sponsor. This requirement can be met by having a non-member physician acquire MAG membership.
- The application must be submitted at least 60 days prior to brochure publication (or activity date if major promotion is not planned).
- There is a specific credit statement and other required language that must be used when a joint sponsored activity is promoted with written materials. The Physicians' Institute will work closely with the non-accredited planner to provide this language, as well as sample forms and letters to use when planning the program.
- All materials must be reviewed and approved by the Physicians' Institute prior to printing and distribution.
- Non-accredited organizations may NOT advertise that CME credit has been applied for, is pending, etc. before approval is granted.
- Specific learning objectives (stated in terms of what the participant can expect to learn, or the desired outcome) must be developed to meet the specific needs of the prospective participants. These learning objectives must be communicated, in written format, to speakers (in order to plan their presentation accordingly) and to prospective participants prior to the activity through publicity mate-

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- Participant evaluation forms must be approved in advance by the Physicians' Institute. A detailed evaluation summary and attendees lists will be provided to the Physicians' Institute within 30 days following the activity.
- Retroactive credit is NEVER granted.

PHYSICIANS' Institute Joint Sponsorship Fee Schedule 2008

First Credit Hour per Activity **\$ 1000**

Additional Credit Hours per Activity **\$ 100**

Plus Physicians' Institute Travel Expenses (only when necessary)

Other Fees:

- If the Physicians' Institute accepts commercial support payment on behalf of the non-accredited partner and is required to make payment back to the non-accredited partner, the Physicians' Institute will charge a 5% fee on the amount of the check as an administrative fee.
- No charge for the first two commercial support agreements, but \$100 each for additional agreements in which the Institute is the CME sponsor.

Joint Sponsorship FAQs

What is joint sponsorship?

Joint sponsorship is the mutual planning, implementation and evaluation of a CME activity between an accredited sponsor, such as the Physicians' Institute, and a non-accredited organization.

What are the ACCME's Essential Areas of Policies?

The ACCME is the official accrediting organization for CME, and the Essential Areas and Policies are a set of criteria that must be met in order to achieve accredited status. For more information on ACCME, go to www.accme.org. For information on the Essential Areas and Policies, go to www.accme.org/index.cfm/fa/EssentialAreas.home/EssentialAreas.cfm

What are the Standards for Commercial Support?

The Standards for Commercial Support describe appropriate behavior of accredited providers when planning, designing, implementing and evaluating certified CME activities for which commercial support is received. For more information on Commercial Support, go to http://www.accme.org/dir_docs/doc_upload/68b2902a-fb73-44d1-8725-80a1504e520c_uploaddocument.pdf

What are acceptable topics for joint sponsorship?

CME consists of educational activities that serve to maintain, develop, or increase the knowledge, skills and professional performance and relationships a physician uses to provide services for patients, the public or the profession. For more information on the American Medical Association definition of CME, go to <http://www.ama-assn.org/ama/pub/category/2937.html>

What topics are unacceptable for joint sponsorship?

The following are unacceptable topics for joint sponsorship: reimbursement enhancement, marketing, character development, self study, and free discussion periods.

Physicians' Institute for Excellence in Medicine, Inc.

Joint Sponsorship Application Information

This information will clarify the application in addition to what is needed for final credit determination.

Agenda

Provide an agenda (a draft is acceptable upon initial application) that includes speaker name, topic, meeting time with breaks and meals for the meeting you are planning. A final detailed agenda is needed before final approval can be determined.

Budget

Provide a budget that lists your anticipated revenue (and sources of revenue) and expenses for the meeting you are planning.

Commercial Support/Grant Money

Commercial support includes, but is not limited to "Restricted or Unrestricted" grants for expenses related to faculty, food, printing, or general meeting expenses. An unrestricted grant means that money can be used for any meeting expenses while a restricted grant means that money is designated to cover a certain expense (i.e., food, speaker, printing). Commercial exhibits are considered promotional in nature and do not need to meet the same requirements. Any money received that supports the educational activity is considered commercial support. Some commercial supporters require a CME accredited provider to accept and manage their support monies. If requested, the Physicians' Institute is able to accept this responsibility of accepting and managing commercial support for a fee of 5% of the amount. *A signed Letter of Agreement must be received by each organization providing an educational grant. Please carefully read the Letter of Agreement for conditions. Grants must be acknowledged in writing in the promotional materials and at the educational activity.*

Evaluation

Each activity must include a written evaluation form for participants to complete in order to determine if the educational objectives were met, the quality of the faculty and content, the participant's perception of enhanced professional effectiveness, what changes will be made in their practices as a result of attending the activity, how the activity could be improved and suggestions of other topics of interest. You will be provided with a sample evaluation form. *Submit a copy of your evaluation form.*

Exhibits/Vendor Displays

As mentioned above under Commercial Support, commercial exhibits are considered promotional in nature and do not need to meet the same requirements. It is important that promotions and education be kept separate. For example, exhibitors are NOT allowed to have a display booth/table in the same room as where the education will be held, at the registration table, or any area that impede traffic to where the education will be held. Also, information about exhibitors cannot be included in the same document as educational materials. *Please let us know if you plan on having exhibitors or vendor displays.*

Faculty

The following documentation is required from each faculty: brief bio, signed disclosure, and other communications, such as letter of invitation to speak. You will be provided with a disclosure form. A signed faculty disclosure must be obtained from each speaker before final approval. Disclosures and use of off label drugs/devices must be printed in the meeting handout book/materials.

Handouts

The handout material/notebook must include the following: learning objectives, joint sponsorship accreditation/designation statement, faculty disclosure statements and a listing of the companies providing educational grants. *Please provide a handout to the Physicians' Institute.*

Learning Objectives

The learning objectives (a draft can be submitted with application) will describe the knowledge, skill and/or attitude physicians will gain by participating in the activity. Properly written objectives will help you decide on activity content and will help participants determine if the activity meets their needs and interests. Words that impart knowledge, skill and attitude include, but are not limited to: analyze, consider, choose, debate, decide, define, develop, distinguish, list, manage, plan, question, review, specify, summarize, and utilize. *Learning objectives must be included in the promotional materials.*

Needs Assessment

Sources of needs identification include but are not limited to: evaluation results from previous educational activities; expert opinion from knowledgeable sources; formal or informal requests from physician members; new medical technology and need to disseminate new information; survey of interest/desires; literature review; data from outside sources (e.g., Public Health Dept., Legislature, NIH); patient satisfaction surveys; decision of committee and/or board/ and medical audit results. Documentation such as meeting minutes, reports, articles, etc are helpful to have. *Provide the source(s) of how you determined there was a need for the activity.*

Participant Verification

Verification of participant is required. The easiest way to do this is to have participants sign in upon registration. Another option is to have registration staff check off participants as they arrive, then sign and verify attendance form that this was done. *CME certificates can only be provided to participants whose attendance is verified.*

Promotional and Handout Materials

All promotional efforts (brochures, letters of invitation, flyers, final program handout book must be reviewed and approved by the Physicians' Institute. Approved activities will identify the joint sponsorship with the Physicians' Institute using the following Accreditation and Designation Statement:

This activity has been planned and implemented in accordance with the Essential Areas and Policies of the Medical Association of Georgia (MAG') through the joint sponsorship of the Physicians' Institute for Excellence in Medicine (PHYSICIANS' Institute) and the <non-accredited entity>. The PHYSICIANS' Institute designates this educational activity for a maximum of ____ AMA PRA Category 1 Credits™. Physicians should only claim credit commensurate with the extent of their participation in the activity.

Pre-Meeting Requirements Check List – submitted prior to activity

- First step: Application and application fee
Application includes questions regarding needs assessment, learning objectives, and draft agenda

The following are submitted after approval of application:

- Copy of any promotional materials
- Proposed Budget for activity
- Faculty documentation (disclosure, bio)
- Commercial support information (letter of agreement)
- On-site materials to be distributed (program book, handouts, etc.)

Post-Meeting requirements Check List – submitted within 60 days after the activity

- Final income/expense summary
- Copies of checks from commercial supporters
- Attendance rosters and sign in sheets
- Evaluation summary and any final meeting minutes addressing outcome of meeting
- Joint sponsorship fee (invoiced)
- Correspondence to faculty providing feedback, evaluation results, etc.