



CONTINUING EDUCATION (CE) PLANNING ROLES & RESPONSIBILITIES

Activity Chair(s)

- Review and comply with the Joint Accreditation Criteria and ACCME Standards for Integrity and Independence in Accredited Continuing Education.
- Assemble a planning committee reflective of the target audience of the educational activity
Planning committee members **who are employees or owners of an ACCME-defined ineligible company will be excluded from participating in the activity. An ineligible company is one whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.**
- Identify professional practice gaps and educational need(s) of the healthcare team and/or members of the team and obtain appropriate evidence to justify the need
- Complete the UW ICEP Planning Application (a link will be provided by the Accreditation Specialist)
- Develop an activity budget
- Oversee mitigation of Conflicts of Interest (COI) and protection of Protected Health Information (PHI)
- Secure qualified faculty who will effectively deliver content that addresses the learning objectives identified in the Planning Application, with the assistance of the planning committee
- Ensure that adult learning principles that promote active learning are incorporated into the educational design of the activity in order to promote learning by, for, and with the healthcare team
- Provide content that presents a fair and balanced view of diagnostic and therapeutic options, by ensuring:
 - All recommendations for patient care are based on current science, evidence and clinical reasoning.
 - All scientific research referred to, reported, or used in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
 - New and evolving topics for which there is a lower (or absent) evidence base, are clearly identified as such within the education and individual presentations.
 - The content avoids advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.
 - The content excludes any advocacy for, or promotion of, unscientific approaches to diagnosis or therapy, or recommendations, treatment or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.
- Monitor delivery of educational content to ensure compliance with accreditation policies and procedures and moderate activity sessions (may be assigned to a designee)
- Lead the activity evaluation and debrief process

Planning Committee

- Review and comply with Joint Accreditation Criteria and ACCME Standards for Integrity and Independence in Accredited Continuing Education.
- Complete assigned tasks as determined by the activity chair
- Engage in Conflict of Interest mitigation process
- Refine the Planning Application to assure linkages between educational needs, format, and outcomes
- Confirm that the content meets criteria for balance, objectivity, scientific rigor, and independence
- Adhere to budget and project timeframe
- Identify qualified faculty who will effectively deliver content that addresses the learning objectives identified in the Planning Application
- Identify appropriate learning materials designed to extend learning beyond the activity
- Monitor the quality of the instructional process to ensure learning by, for, and with the health care team
- Evaluate the activity and engage in the debrief process



Activity Coordinator

- Review and comply with Joint Accreditation Criteria and ACCME Standards for Integrity and Independence in Accredited Continuing Education.
- Serve as the point of contact for ICEP Accreditation Specialist
- Serve as a member of the planning committee
- Assist in developing the activity budget. If desired, secure resources such as commercial support and exhibits
- Report receipt of all funding to ICEP Accreditation Specialist to ensure compliance with the ACCME Standards for Commercial Support; NOTE: A signed Letter of Agreement (LOA) is required for all grants received from commercial interests. All LOAs must be signed by the grantor, reviewed by the ICEP Accreditation Specialist who will submit to the SMPH Dean's office for review and signature. LOAs must be fully executed before the start of the activity.
- Facilitate the COI process and COI mitigation for planners and faculty
- Assist in choosing the venue and act as venue coordinator
- Correspond with speakers and act as speaker liaison
- Create the marketing plan and advertising piece(s), ensure all marketing is reviewed and approved by ICEP Accreditation Specialist
- Manage the registration process
- Assist in compiling appropriate learning materials to be shared with learners
- Prepare the evaluation summary
- Analyze and report the post-activity process (evaluation, outcome summary, final accounting)

UW ICEP (Accreditation Compliance Monitoring)

- Oversee course development, implementation, evaluation, budget, and registration as they relate to Joint Accreditation Criteria and ACCME Standards for Integrity and Independence in Accredited Continuing Education.
- Review and provide constructive feedback on the UW ICEP Planning Application
- Institute financial arrangements, in keeping with UW ICEP Policies and Procedures and UW Madison guidelines
- Recommend a structure (educational format) for adequate delivery of the CE activity
- Designate appropriate number of credits
- Document evaluation and outcome measures process
- Review all promotional materials for compliance with Joint Accreditation Criteria
- Review and maintain financial records and evaluation summaries
- Retain participation attendance records for 6 years
- Respond to inquiries regarding credit
- Address participants' perceptions of enhanced professional effectiveness and any concerns with commercial bias
- Maintain all documents that support compliance with Joint Accreditation Criteria