



CONTINUING EDUCATION (CE) PLANNING ROLES & RESPONSIBILITIES

Activity Chair(s)

- Review and comply with the Joint Accreditation Criteria and ACCME Standards for Commercial Support
- Assemble a planning committee reflective of the target audience of the educational activity
 - Planning committee members ***must not be employees of an ACCME defined commercial interest as defined here:*** <http://www.accme.org/requirements/accreditation-requirements-cme-providers/policies-and-definitions/definition-commercial-interest>
- 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
 - Link: https://ce.icep.wisc.edu/admin/structure/entity-type/course_application/course_application/add
- Develop an activity budget
- Oversee resolution 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
- Ensure activity content is based on evidence that is accepted within the profession of medicine and that all scientific research referred to, reported or used conforms to the generally accepted standards of experimental design, data collection and analysis
- 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 summary process

Planning Committee

- Review and comply with Joint Accreditation Criteria and ACCME Standards for Commercial Support
- Complete assigned tasks as determined by the activity chair
- Engage in Conflict of Interest review and resolution 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 summary process

Activity Coordinator

- Review and comply with Joint Accreditation Criteria and ACCME Standards for Commercial Support
- 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 resolution 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, registration as they relate to Joint Accreditation Criteria and Standards for Commercial Support
- Review and provide constructive feedback on the UW ICEP Planning Document
- 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



**Interprofessional
Continuing Education Partnership**
UNIVERSITY OF WISCONSIN-MADISON

School of Medicine
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