

# The MORE Foundation



## Standard Operating Policies for Continuing Education Credits

**The MORE Foundation and the CE Committee are responsible for ensuring compliance with the ACCME Essential Areas, Elements, Criteria, Policies and Standards for Commercial Support as well as other regulations as they relate to the quality of CME.**

**The Arizona Sports Medicine Society (AZSMS) is accredited by the Board of Certification (BOC) for the Athletic Trainer for athletic trainers. The AZSMS, MORE Foundation, and the CE Committee are responsible for ensuring compliance with the BOC Standards.**

**The MORE Foundation and the CE Committee are responsible for ensuring compliance with the AzPTA and providers of the American Nurses Credentialing Center.**

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## **MORE Foundation Mission**

The MORE Foundation mission is to empower individuals to *Keep Life in Motion*® through innovative research, community education and charitable assistance.

## **Continuing Education (CE) or Educational Credit Mission**

The Continuing Education and Educational Credit (inclusive of Continuing Medical Education (CME), Continuing Nursing Education (CNE), athletic trainer and physical therapy continuing education) program supports MORE Foundation mission by providing educational opportunities to promote best practices and positively influence the quality of health care. The information presented will serve to maintain, develop, or increase the knowledge, skills, and expertise of the participant physicians, allied health professionals, and athletic trainers. The Continuing Education (CE) Committee strives to provide learning opportunities that give a balanced view of therapeutic options and are free of any specific proprietary business interest.

### **Content Areas**

The content of the activities is directed towards musculoskeletal health and neurologic practice. The activities offered will address at least one of the Institute of Medicine's six core competencies (Professionalism, Patient Care and Procedural Skills, Medical Knowledge, Practice-based Learning and Improvement, Interpersonal and Communication Skills, & Systems-based Practice). The scope of the activities is based on basic and clinical sciences, evidence based medicine-best practices, clinical updates, procedural advances and technology, practice management or programs to advance health care delivery.

CE activities provided by accredited providers of the Accreditation Council for Continuing Medical Education (ACCME), BOC for the Athletic Trainer, AZPTA for physical therapy providers, and providers of the American Nurses Credentialing Center (ANCC) for nurses are used for the purpose of increasing knowledge, skills, performance, and to assist with state re-licensure or certification. The ACCME defines content that is acceptable for CME as:

“Continuing medical education consists of educational activities which serve to maintain, develop, or increase knowledge, skills, and professional performance and relationships that a physician uses to provide services for patients, the public, or the profession. The content of CME is that body of knowledge and skills generally recognized and accepted by the profession as within the basic medical sciences, the discipline of clinical medicine, and the provision of health care to the public.”

Continuing nursing education (CNE) activities are defined as:

“Those learning activities intended to build upon the educational and experiential bases of the professional nurse for the enhancement of practice, education, administration, research, or theory development, to the end of improving the health of the public and nurses' pursuit of their professional career goals.”

BOC for the Athletic Trainer and the AZPTA for physical therapy providers do not provide a specific continuing education definition, but their standards are consistent with the CME and CNE definitions.

The content of a CE activity must provide a balanced option for available treatment and be unbiased toward a particular product or manufacturer. Pros and cons should be analyzed and reflected in the content, and based on a need related to competence, practice performance improvement, or increased quality in patient care.

### **Target Audience**

The target audience of MORE Foundation CE activities is healthcare providers, athletic trainers, physical therapists, and nurses. The topics will be chosen based on an identified learner gap or needs assessment, new technology, techniques, procedures and protocol, or recent evidence or research, information from current literature, and quality improvement reports.

### **Types of Activities**

The educational programs will be based on best practices and sound educational principles as exemplified by the Arizona Medical Association Criterion and Guidelines for CME, Board of Certification (BOC) for the Athletic Trainer Standards, the AzPTA, and the ANCC. The types of activities and learning format are designed to meet the objectives of the activity and close learner gaps. These may include conferences, workshops, journal clubs, case discussion forums, cadaver labs, morbidity and mortality lectures, live presentations, enduring activities, and other innovative educational opportunities.

### **Expected Results**

It is expected that the educational activities will enhance the participants' knowledge, skills, expertise, or behavior with ultimate improvement in care recipient's health outcomes. It is expected that activities will be conducive to the maintenance of competency, improved performance, and enhanced patient outcomes. The CE Committee strives to measure outcomes by linking the identified practice gaps and learner gap analyses with changes achieved as a result of the overall program educational interventions.

### **Accreditation Boundaries**

The MORE Foundation will service CE activities and organizations that are primarily located in Arizona, Michigan, or for a MORE directly or jointly provided event irrespective of location. MORE Foundation reviews continuing education courses and grants approval for those courses that meet established quality standards. This includes single, regularly scheduled series (RSS), repeated, and jointly sponsored activities. The MORE Foundation reserves the right to decline accreditation.

## **Broadcast CE**

Live activities can be broadcast to other locations. Each activity location must be interactive with the live activity. The speaker must be heard clearly at all locations as well as questions from learners at each location. Questions should be repeated by the speaker to insure that all learners hear all questions. Each location must have a room moderator to ensure the sign-in sheet and evaluations are available and attendance is monitored. CE credit is available during the live activity. Credit received for watching a recorded activity at a later date will be determined for each activity. Advertising of any type is prohibited within the educational setting. (See Commercial Support & Promotional Materials and Exhibits)

## **Application**

### **Review**

The CME application is provided by The MORE Foundation. The application, fee, and required forms must be completed to determine a learner gap/needs assessment to validate a CME activity. The Education Director and CE Committee will review and determine approval of the activity.

### **Renewal**

Activity organizers for recurring events will be contacted when their applications are coming up for renewal. If the organizer wishes to apply for renewal, documentation verifying outcome measurements must be submitted at the time of the renewal application submission.

### **Revoked or Denied Applications**

It is the mission of MORE Foundation to serve the educational needs of community physicians and other healthcare providers. At times it may be necessary to revoke authorization of accreditation for CME activities or renewing applications. The re-application process shall be:

1. When the CE Committee declines approval of CME accreditation for a new or renewing application, the minimum time period for reapplication will be three months from date of review. The re-application time period could be extended at the discretion of the committee. No new applications will be considered during this time frame for the parties involved.
2. The CE Committee reserves the right to terminate CME accreditation due to non-compliance of ACCME guidelines or BOC Standards at any time.

3. The Education Director or designated members of the CE Committee are available to provide instruction about the processes required for compliance.

### **Attendance Sign-In Method / Evaluations / CME or Credit Certificate**

CME or credit attendance sign-in method must be utilized at the CE activity. The activity organizer will receive a sign-in sheet from MORE Foundation after approval of the event. Attendees must sign in and be present for the entire event for which credit is received. It is the responsibility of the activity organizer to monitor attendance. Once the activity has started, but not longer than 10 – 15 minutes, the activity organizer is responsible for removing the sign-in method. The sign-in method must be legible for credit to be recorded. Upon completion of the activity, the organizer must send the sign-in method to the CE office within seven business days. Within that timeframe, the organizer must also send documentation of what was covered such as presentation copies, speaker information, or case conference form and evaluations. An evaluation will be completed by each participant. A CME or Credit Certificate will be provided at the close of the event or after the evaluation is received.

Failure to consistently submit required session documentation will result in probation of recurring activity, or possible termination of future CME. The MORE Foundation or CE Committee members may attend a CME activity to monitor the activity for compliance.

#### **Partial Credit**

For regularly scheduled series, partial credit will not be awarded for attending less than the allotted time for each individual session. For example, if someone attends 30 minutes of a 1 hour long Grand Rounds session, no CME credit will be issued.

For Course/Single Activities that offer multiple topics and/or break-out sessions, CME credits can be awarded for those sessions that were attended according to the approved plan established by the organizer.

#### **Late Evaluations**

The MORE Foundation office will not accept late evaluations. The evaluation period for each educational activity is open for 30 days after the event. Evaluations will not be available and CME credit will not be granted after this time period.

#### **CME or Credit Transcripts/Records**

CME or credit transcripts/records are maintained in an archive or data system for a minimum of 7 years.

## **Cancellation/Refunds**

Request for cancellation and a refund must be received in writing at MORE Foundation by the date indicated in registration materials. A cancellation fee will be charged, when applicable. Beyond the date provided, no monetary refunds will be issued. In some instances, the registration fee amount, less cancellation fee, will be credited toward another MORE Foundation educational event within one year. A no show fee may be charged for any preregistered participant who fails to attend the educational event or does not cancel the registration within the time period allotted.

The MORE Foundation reserves the right to cancel an event prior to the course date. Any person who has registered for the event will be notified by email at the address provided. A telephone call will also be made to each registrant for whom a number is available. Persons whose registration is received after an event is cancelled will be notified by telephone and e-mail. Registration fees will be refunded in full. However, other costs incurred by the registrant, such as travel or hotel costs are the responsibility of the registrant.

## **Commercial Support**

Funds received in support of an educational activity from a commercial interest must be in the form of an educational grant. (ACCME and ANCC define a commercial interest as any entity producing, marketing, reselling, or distributing health care goods or services consumed by, or used on patients. The ACCME does not consider providers of clinical service directly to patients to be commercial interests.

### **Commercial Support Management**

MORE's CE Committee must make all decisions regarding the disposition and disbursement of commercial support. MORE's CE Committee cannot be required by a commercial interest to accept advice or services concerning speakers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.

All commercial support associated with a CME activity must be given with the full knowledge and approval of the MORE CE Committee. The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter and MORE Foundation and educational joint partner(s), when they exist. The agreement must include MORE Foundation, even if the support is given directly to the educational joint partner. The written agreement must specify the commercial interest that is the source of commercial support. Both the commercial supporter and MORE Foundation must sign the written agreement between

the commercial supporter and MORE. The agreement must be executed prior to the event.

MORE Foundation will document the receipt and expenditure of the commercial support. Funds can be used to pay speaker honorarium(s), speaker travel, lodging, meals, personal expenses, and room rental for the educational activity in accordance with educational grant restrictions, when received, and MORE Foundation's guidelines for reimbursement. MORE may use commercial support to pay for travel, lodging, meals, or personal expenses of bona fide employees, volunteers, and joint educational partner(s). Detailed receipts must be provided for expenses to be eligible for reimbursement. Upon completion of the CME activity, the joint provider must provide a copy of the final budget and expenses to MORE Foundation.

### **Honorarium(s) and Expenses**

Educational grants given by a commercial entity must be paid to MORE Foundation or the joint educational partner. The MORE Foundation will be responsible to assure payment for speakers' honoraria, travel/lodging expenses, and room rental for the CE activity. Speakers' honorarium and expenses will be reimbursed directly to the speaker(s) by MORE Foundation. Honorariums must be reasonable and customary as concluded by MORE Foundation and CE Committee. Extenuating circumstances will be taken under advisement. If an honorarium is being paid to a speaker(s), the source of the funds must be disclosed to the learners.

### **Independence**

The educational activity shall be planned and the content controlled by the provider, including identification of the need/gap in practice and competency(ies) to be addressed, objectives, outcomes, selection of speakers, education method and evaluation. The commercial interest shall have no involvement or influence in the planning of the activity. Product promotion material and/or product specific advertisement is prohibited during the educational activity. Live (staffed exhibits, presentations) or enduring (printed or electronic advertisements) must be kept outside of the educational room.

### **Promotional Exhibits and Materials**

The provision of exhibits at educational activities may serve to complement or enhance the activities' value. At the discretion of the planner responsible, commercial exhibits may be invited to display materials relevant to the subject of the meeting.

Additional exhibitor guidelines include:

1. Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support.
2. Exhibit fees shall be set for the activity. Potential exhibitors shall have equal access to purchasing exhibit space (first come-first serve).
3. Exhibit fees shall be separate and distinct from educational grants.
4. Fee amounts can be based on amount of space (i.e., 3' table vs 6' table, location, program page size, for-profit vs not-for-profit)
5. The number of company representatives permitted to attend will be determined by the CE committee.
6. All exhibitors must be in an area separate from the education room/space, and exhibits must not interfere or compete in any way with the learning experience.
7. Commercial representatives may attend the CE activity at the discretion of the planner responsible for the direct purpose of the representatives own education. They may not engage in sales or marketing during the educational activity.
8. Information on the identity of learners at CE activities is considered to be confidential property.
9. Exhibits must be in compliance with ACCME Standards for Commercial Support. See [www.accme.org](http://www.accme.org)

#### **Printed/Promotional Materials**

Enduring (printed or electronic advertisements) promotional activities must be kept separate from CE. The MORE Foundation does not permit subtle advertising in conjunction with CE accredited activities. Educational handouts and slides cannot contain trade names, trade logos or product-group messages. Advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a live CE activity. Learners shall not be forced to interact with exhibitors and/or promotional activities. Commercial interests are not allowed to engage in sales or promotional activities while located in the designated space of the CME activity.

#### **Gifts from Commercial Entities**

There will be no direct support to a third party of any CE activity. A commercial entity may not directly pay for any expense associated with the activity, including, but not limited to catering, lodging, travel expenses, or speaker honorariums. No pharmaceutical samples or gifts are allowed in connection with CE activities.

### **Social Events/Meals**

Social events or meals at CE activities cannot compete with or take precedence over the educational activity.

## **Conflict of Interest (COI)**

### **Disclosure**

The MORE Foundation follows the ACCME Standards for Commercial Support ([www.accme.org](http://www.accme.org)), BOC for the Athletic Trainer COI Standard (<http://www.bocatc.org/ats/>), AzPTA Standards, and ANCC criteria.

Anyone in a position to control content of an educational activity must disclose all non-relevant or relevant financial relationships with any commercial interest(s) prior to the start of the activity. A person in control of content includes, but not limited to, planners, faculty, authors, committee members, content reviewers, editors, and staff. Disclosure must be documented by each person in a position of content control.

CE Committee members' disclosure statements are signed annually and updated immediately if changes occur.

After the educational topic and application has come to the CE Committee and as early as possible in the planning process for each educational event or series of events, relevant financial conflicts of interest will be identified. First the content will be examined as to whether it relates to any potential products or business lines of commercial interest(s). As defined by the ACCME, BOC for Athletic Trainers and ANCC, a commercial interest is any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on patients. A "relevant financial relationship" is a relationship in any amount occurring within the preceding twelve (12) months that create potential bias or conflict(s) of interest that relate to the educational activity. Relevant financial relationships are personal or business interests, including those of a spouse or partner. Financial relationships are relationships in which the individual benefits by receiving salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual fund(s)), or other financial benefit. It is the policy of MORE Foundation to require the provider to identify and manage conflicts of interest prior to the activity. The provider must be able to show that activity planners, organizers, and presenters have disclosed all non-relevant and/or relevant financial relationships prior to the start of the activity.

No employee or owner of a commercial interest shall be involved in planning or implementing CME activities related to their products or services. They shall not be a presenter, serve on the CE Committee, or review material for CME purposes.

For each person in control of educational content, relevant financial relationships will be determined. Any individual who refuses to disclose will be disqualified from participating in the CE activity.

### **Conflict of Interest Resolution**

In the event MORE Foundation finds potential for a conflict of interest of anyone in control of the content of the CE activity, one of the following actions will be initiated to allow for resolution.

The CE Committee will take an active role to resolve conflicts by:

- Recusing person from controlling aspects of planning and content with which they have a conflict of interest and/or
- Using peer-review of planning decisions (for planners) by person(s) that do not have conflicts of interest related to the content and/or
- Using peer-review of content (for authors/presenters) by person(s) that do not have conflicts of interest related to the content and/or
- Ensure that clinical recommendations are evidence-based and free of commercial bias (e.g., peer reviewed literature, adhering to evidence-based practice guidelines)
- If a conflict is detected, the speaker will be asked to modify the content, or the speaker will be replaced.

Slides, handouts and educational materials should be reviewed prior to the activity start. Before the activity, the educational provider will disclose to learners the names(s) of the individual(s), name of the commercial interest with which they have a relevant financial relationship(s) and the nature of the relationship for all those in control of content. MORE Foundation requires speaker disclosure(s) are included near the beginning of the slide presentation, generally as part of the first or second slide. The source of all commercial interest must be disclosed to the learners, including “in-kind” support. Disclosure must never include the use of a trade name(s) or product-group message. Upon approval of the CME activity a list of the individuals involved with the planning will be provided for display or publication, included in a handout or included with slide presentation(s).

### **Absence of Disclosure**

If MORE Foundation is notified that disclosure did not take place, a letter will be sent to the physician or person responsible and activity organizer of the activity requesting an explanation. In addition they may be asked to send a letter to all attendees of the activity to let the attendee's know of the potential conflict of interest due to the lack of disclosure. Future accreditation of a recurring activity may be in jeopardy, and possibly placed on probation for non-compliance. It will be at the discretion of MORE Foundation and the CE Committee to determine the necessary probationary period, and requirements for compliance.

### **Grievance**

In the event of a grievance, complaint, or problem related to the CE event or process, it will be given prompt attention and resolved in a timely manner. If the person receiving the grievance is unable to provide resolution, it will be reported to the Director of Education, Executive Director, Research and Education, a member of the management team, or a trustee. He/she will document and address the grievance, initiate a process to identify and address any injustice that may have occurred, and mediate to resolve the issue. All related documentation will be kept on file for up to three years. Any trends in grievances will be addressed by the Executive Director, Research and Education, and/or the CE Committee.

### **Joint Providership**

MORE Foundation must be involved before any major planning occurs for the CE activity. Completed application and information must be submitted at least sixty (60) days prior to the date of the event. The CE Committee meets every four weeks. The MORE Foundation reserves the right to refuse to enter into a joint providership agreement for any reason.

1. Someone from MORE Foundation or CE Committee must be a planning committee member for a joint providership program.
2. A commercial interest cannot take the role of non-accredited partner for a joint providership relationship.
3. Joint providership activities must be consistent with MORE Foundation's Mission statement.
4. An application fee will be charged for joint providership programs and is due at time of application submission.
5. All education grants will be applied for through MORE Foundation. A fee will be charged for each grant submission.
6. Funds received from educational grants will be distributed by MORE Foundation, or MORE Foundation can designate a payee.
7. The MORE Foundation is not responsible for any unpaid expenses involved with the educational activity.

8. If changes are made to the educational activity after committee approval, the changes must be resubmitted for review and approval.
9. In the event of a cancellation there is no refund of the application fee.

### **Non-discriminatory Practices**

The MORE Foundation shall ensure that no individual is denied participation in continuing education programs offered on the basis of race, color, national origin, religion, sex, disability, military status, sexual orientation, or age. To prevent discrimination, the following practices will be followed:

- Promote equality and diversity.
- Recognize and respond to the needs and requirements of the participants who attend continuing education programs.
- Ensure that presenters are aware of the requirements and avoid discrimination during the administration of programs and activities.

The statement below will be included in education program materials, including but not limited to mailings, brochures, and websites.

“MORE Foundation does not discriminate on the basis of race, color, national origin, religion, sex, disability, military status, sexual orientation, or age. The MORE Foundation is committed to accessibility and non-discrimination in all aspects of its continuing education activities. Participants who have special needs are encouraged to contact program organizers so that all reasonable efforts to accommodate these needs can be made.”