



Chicago Medical Society's Policies for

Commercial Support, Faculty Members, Authors, Planners, Course Directors, Committee and Staff Members, Reviewers, and Joint Providers:

Honoraria: Only faculty members and/or authors are to receive an honorarium. Upon receipt of a check for an educational grant, payment to the speakers is to be made by CMS within thirty (30) days based on the agreed amount listed on the letter of agreement or as deemed appropriate by the assigned course director. CMS is responsible for issuing payment for all directly-provided CME activities and the joint provider (education partner) is responsible for issuing payment for a jointly-provided CME activity. Following the activity, and if commercial support has been secured, *joint providers must be prepared to provide CMS with documentation of any teacher/author payments.*

Disclosures of Relevant Financial Relationships & Conflicts of Interest (COI) Management:

**See attached Policies for CMS and Joint Providers on Commercial Support, Faculty Members, Authors, Planners, Course Directors, Committee and Staff Members, and Reviewers.*

Letter of Agreement (LOA):

A letter of agreement (LOA) must be signed for a CME activity when entering into an agreement with a commercial entity on securing educational support or an in-kind donation. The terms on the agreement must be adhered to by all parties involved including: faculty members or authors, planning committee/staff members, and joint providers. No type of advice and/or services with regards to faculty members and authors, planning committee or staff members, joint providers, including content, will be accepted or permitted by CMS or a joint provider and **will not** be a condition of the commercial support.

Out-of-Pocket Expenses:

These types of expenses will be reimbursed, if previously agreed upon with the course director and CMS **and** found to be reasonable and deemed necessary functions of the role that a faculty member, planning committee/staff member or author serves with the CME activity. Reasonable expenses include but are not limited to: ground transportation, mileage expense (based on the current rate), daily meals (if applicable), up to \$500.00 for round trip air fare (with exceptions and if applicable), and lodging accommodations (if applicable) which must be pre-approved by CMS.

Original receipts must be provided to CMS or to the joint provider, within 30 days of the completion of an activity for any out-of-pocket expenses that are over twenty-five dollars (\$25.00). CMS will issue appropriate reimbursement to faculty members, authors or planning committee members within 45 days upon receipt, review and verification of all original receipts.

Joint Providership:

The Chicago Medical Society (CMS) holds the activities it jointly provides to the same standards of directly provided activities. The following describes conditions that must be met in any joint providership into which CMS may enter:

The joint provider must follow the policies, procedures and formats as set forth by CMS. The proposed activity must be consistent with the CMS mission statement. The CME Subcommittee on Joint Providership, in conjunction with the assigned course director, must review and approve the needs assessment/professional practice gap, the learning objectives, the design and format of the educational activity, the final faculty selection, the evaluation methodology and provide a budgetary reconciliation. In addition, all activities must be reviewed for content validation and the independence of control from a commercial interest at the expense of the non-accredited education partner.

Jointly-provided activities must comply with the ACCME's accreditation requirements, policies and Standards for Commercial Support (SCS). Any commercial funds solicited on behalf of the activity must be received by CMS or must be authorized in writing to be delivered to the joint provider who shall provide full budgets, updates and copies of commercial support checks to CMS. The non-accredited education provider may solicit commercial funds with the direction of CMS, but may not make any representations or commitments to funding sources as to content, choice of speakers, or anything else not allowed by the ACCME's accreditation requirements, policies and/or SCS.

All commercial supporters must sign a Third Party Letter of Agreement (LOA), either a CMS LOA or the supporting company's LOA. The commercial supporter will be acknowledged in the activity's materials once the signed LOA has been fully executed.

All budget items for the activity, including, but not limited to honoraria, reimbursements, tuitions and grants, must receive the prior approval of CMS.

CMS must review and approve all advertising materials associated with the activity prior to release. The CMS must be clearly recognized as a joint provider. The following joint providership accreditation statement must appear on all advertising materials:

"This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of the Chicago Medical Society and _____ [name of joint provider goes here] _____. The Chicago Medical Society is accredited by the ACCME to provide continuing medical education for physicians."

The Chicago Medical Society designates this live activity 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.

CMS will withdraw from any joint providership if the non-accredited education provider fails to meet its obligation in the agreement or fails to comply with this policy or any fees associated with their application.

CMS holds its jointly provided activities to the same standards as activities it directly provides with regard to fulfillment of its CME mission, needs assessment, setting of objectives, use of systematic planning processes, evaluation, documentation and upholding the ACCME Standards for Commercial Support. The Executive Director of CMS along with the CME planning committee, whose decision in any dispute is final, will resolve any confusion regarding CMS standards and/or policies.

All potential joint providerships will be examined on their individual merits. Although all CME activities jointly provided with CMS must comply with this policy, CMS reserves the right to refuse to enter into a joint providership with a non-accredited education provider for any reason whatsoever, regardless of that organization's willingness to comply with this policy.

CMS will charge a fee for its services. This fee and the terms for its payment will be mutually agreed upon on the CME Application for Joint Providership.

All future use of this activity (e.g., derivatives such as DVDs, publications, online programs, webinars, etc.) may be distributed only with the prior approval and written consent of CMS.

Marketing and/or publicizing of any derivative of this jointly provided activity, including direct mail, fax and/or e-mail notification, telemarketing, etc., may proceed only upon prior approval and written consent by CMS.

The activity and related events must comply with AMA's Guidelines on Gifts to physicians from Industry, in compliance with the policies of the AMA Council on Ethical and Judicial Affairs, 8.061 and 9.011.

The activity must comply with CMS Policy on Full Disclosure.



Chicago Medical Society's (CMS) Policies for

Commercial Support, Faculty Members, Authors, Planners, Course Directors, Committee and Staff Members, Reviewers, and Joint Providers:

CMS Policy: All persons in a position to control the content of a CME activity (i.e. planners, course directors, faculty members, reviewers, authors, committee, and staff members) are presented with CMS' Policies and instructed to review the policies prior to the planning of a CME activity.

CMS Policy: All persons in a position to control the content of a CME activity (i.e. planners, course directors, faculty members, reviewers, authors, committee and staff members, etc.) are required to complete the CMS Conflict of Interest (COI) disclosure form. Individuals who fail to submit a completed COI form are disqualified and will not be permitted to participate in the activity.

CMS Policy: All persons in a position to control content of a CME activity are required to disclose all relevant financial relationships in any amount occurring within the past 12 months on the COI form.

CMS Policy: All course directors, reviewers, planners, committee and staff members in a position to control content of a CME activity and that have relevant financial relationships with commercial interests, are disqualified from participating in the activity and cannot have control of, or responsible for, the development, management, presentation or evaluation of the CME activity.

CMS Policy: All faculty, presenters, and authors of CME, are required to base their presentations and recommendations on the best available evidence and be prepared to have some or all of their materials reviewed by peers prior to the activity.

- Participants (learner(s)) are asked to evaluate the objectivity of the presentation and to identify any perceived commercial bias on the "post-survey form".
- CMS intervenes prior to the activity, at the activity, or after the activity, to address any bias that may have crept in.

CMS Policy: All CME activities must disclose to the learners in writing, *either* on the CME meeting notice *or* on the meeting agenda any relevant financial relationship(s) with commercial interests and include:

- The name of the individual;
- The name of the commercial interest(s);
- The nature of the relationship the person has with each commercial interest.

All CME activities must disclose to the learners all individuals with no relevant financial relationship(s) with commercial interests in writing, either on the CME meeting notice or on the meeting agenda that no relevant financial relationship(s) exist and to include the name(s) of the individual(s).

The reviewing committee considers these relevant disclosures at the time of the initial application/planning process and prior to the activity. If conflicts of interest have not been resolved the activity is disqualified and will not be accredited as CME.

CMS Policy: Any detection by CMS of any type of advertising, including corporate logos, trade names and/or product-group messages of commercial interests will be immediately removed from the presentation and/or CME program.

- **SCS STANDARD 4.3:** Educational materials that are part of a CME activity, such as slides, abstracts and handouts, **cannot contain** any advertising, corporate logo, trade name or a product-group message of an ACCME-defined commercial interest.
- CMS will monitor all CME activities, including their educational materials and slides, and conduct random audits to ensure that this policy is continuously being upheld.