CUNSHT

Edited by



PRACTICAL MATTERS

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THE SELECTION OF THE LEAD PLANNER.THE COURSE CHAIR. SHOULD BE **MADE WITH FYFS WIDF**

Resolving Conflicts of Interest for Planners

EMPHASIZE COI RESOLUTION FROM THE BEGINNING OF THE PLANNING PROCESS. BY STEVE PASSIN, FACME, CCMPE, AND SUSAN O'BRIEN, CCMEP

OST OF US DO A GOOD JOB of identifying financial relationships of faculty involved in a continuing medical education activity, and of resolving conflicts by reviewing presentations to ensure they are free from commercial bias, fair and balanced, and scientifically objective. But sometimes we forget to pay attention to the planners of the activity in advance, and end up resolving their conflicts with content review at the end of the planning process, rather than prior to the development of the activity.

Accreditation Council for CME requirements state that all individuals who influence content must participate in the provider's process to identify and resolve relevant conflicts of interest. Recently, we have noticed more attention being paid to planner resolution during ACCME site surveys. Some instances of noncompliance for ACCME Criterion 7 we've seen arise out of the lack of satisfactory planner resolution early in the planning process (see sidebar on page 11). The selection of the lead planner, the course chair, should be made with eyes wide open relative to his or her financial relationships. Because the planning team usually shapes the activity content—they select the topics, faculty, venue, formats, etc.—making the right choices early on in the planning process is critical. Since the planners are the content experts, it's not really an option to exclude them from participating. What can you do to ensure potential conflicts are resolved and the planners' relationships do not unduly

affect the content of the course?

Practical Tips for Identifying and Resolving Planner COI

Here are a few suggestions that can be implemented right away and documented in your activity file:

- Let the course directors/planners **know the requirements** for disclosing relevant conflicts of interest and for their participation in the process; consider a planner/faculty agreement form that requires independence from relevant COI (see Figure 1 for an excerpt from this suggested form).
- **Inform senior management** about the need to ensure the content is based on valid needs assessment data and not driven by faculty/planner selection. As a starting point, consider revising your policy on the identification of financial relationships and resolution of COI to include clear direction on PLANNER issues and processes; an example of this Policy's section on planner COI is shown in **Figure 2**.
- Think about the issue of planner conflicts the minute you start planning an activity. Choose a course chair and other planners who don't have conflicts in the first place, or who have minimal conflicts. If this is not possible, consider adding a non-conflicted planner to the committee so serve as a check-and-balance for the conflicted planner.
- Collect financial relationship information from planners early enough so that their relevant COI can be resolved, or if resolution is not possible, they can be replaced.

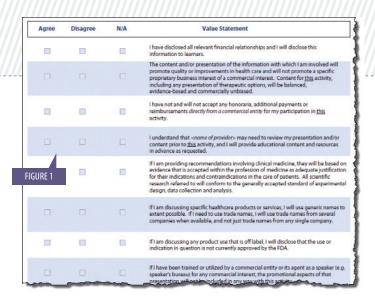
If you work in a hospital or academic center, ask the CME committee to review the activity to ensure that content is not influenced by planners' relationships and that it is driven by the physicians' need for further education on the specific topic.

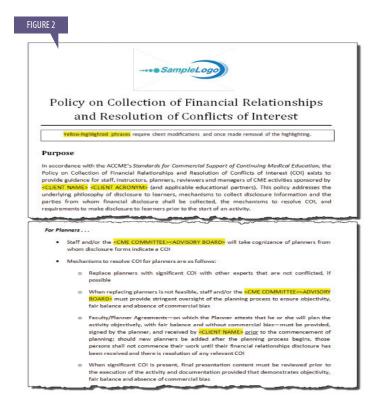
- **Limit** the conflicted planners' involvement to aspects of planning that are not related to the reported conflict.
- Partner the conflicted planner with a non-conflicted planner to ensure reported relationships do not influence the selection of content, formats, faculty, or any other aspect of the course.
- Document, document! Consider using a COI management documentation form, which you maintain in the activity's file. The form provides evidence of how you resolved planner COI.

It is important that you clearly identify planners (and all other persons who affect the content of CME) by type of participant (i.e., planner, faculty, reviewer, writer, etc.). In addition, be sure to provide this information to the learners prior to the commencement of the activity in course materials or in the opening slides.

We have developed samples of documents to assist you in maintaining compliance with these rules, including a sample faculty/planner agreement, a sample policy, and a documentation of resolution of COI form, which you can download from www.passinassociates.com/ mmm downloads. M

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CRITERION 7 The provider develops activities/educational interventions independent of commercial interests. (SCS 1, 2, and 6)

ACCME NOTE ABOUT CRITERION 7: Accredited continuing medical education is always designed and presented in a manner whereby the

hands of the provider. The provider must obtain information from all those in control of content (e.g., planners, teachers, and authors) so as interest. The provider must disclose to learners the relevant financial