**Roles and Responsibilities of Activity Physician Directors, Activity Coordinators, and   
Center for Learning and Professional Development Staff for Live CME Activities**

The Dartmouth-Hitchcock (D-H) Center for Learning and Professional Development (CLPD) has responsibility for all Live CME Activities approved for *AMA PRA Category 1 Credit*. To this end, all activities requesting CME credit must meet the Accreditation Council for Continuing Medical Education (ACCME) requirements and guidelines. Please note: if the activity planners would like to offer Continuing Nursing Education (CNE) contact hours, a Nursing Continuing Education Council (NCEC) Nurse Planner must be involved throughout the planning process.

**Live CME Activities: Physician Director Responsibilities**

1. Assures compliance with [ACCME accreditation criteria](http://www.accme.org/requirements/accreditation-requirements-cme-providers/accreditation-criteria).
   1. Identifies physician learning gaps and supplies at least two forms of needs assessment documentation.
   2. Formulates primary purpose of activity and the learning objectives that inform the activity outcomes in terms of competence, performance, and/or patient outcomes.
   3. Assures that education design and content is appropriate for target audience.
2. Formulates educational content based on the stated objectives and identified needs.
3. Completes, reviews and signs Continuing Medical and/or Nursing Education Activity Submission

Portal.

1. Takes responsibility for oversight of the financial integrity of the activity.
2. Accountable for adhering to all D-H, Geisel School of Medicine at Dartmouth (GSMD) and Dartmouth College financial policies and procedures including reporting related to the activity.
3. Secures and confirms faculty topics and time commitments.
4. Responsible for making sure that no product-promotion or product-specific advertisements are juxtaposed with educational materials.
5. Solicits exhibit fees from pharmaceutical companies, when appropriate.
6. Supervises actual course sessions or designates personnel.
7. Assures evaluation summaries are used to assess the extent to which educational objectives are met, and to ascertain changes in competence and performance and whenever possible, improvements in patient outcomes and population health.
8. Oversees the quality of the instructional process.
9. Addresses participants’ perception of enhanced professional effectiveness and whether or not commercial bias was noted.

**Live CME Activities: Activity Coordinator Responsibilities**

1. Completes the [Intent to Accredit Form](https://med.dartmouth-hitchcock.org/ccehs/intent_to_apply_form.html) on CLPD website.
2. Follows guidelines that comply with the ACCME and the D-H Center for Learning and Professional Development.
3. In collaboration with the Physician Activity Director, completes and submits to CLPD a Continuing Medical and/or Nursing Education Activity Submission Portal no later than three months prior to the date of the activity.
4. Submits to CLPD the D-H [Conflict of Interest/Resolution Disclosure Form](https://med.dartmouth-hitchcock.org/documents/Conflict_of_interest.docx) for the following individuals:
   1. Activity Director(s) - submit within Continuing Medical and/or Nursing Education Activity Submission Portal
   2. All Planning Committee Members - submit within Continuing Medical and/or Nursing Education Activity Submission Portal
   3. All faculty - no later than 2 weeks prior to activity
5. Corresponds with company representative(s) for exhibits and secures Intent to Exhibit form(s) and payment.
6. In conjunction with CLPD staff, obtains Letters of Agreement from commercial supporters for grants (including third party agreements) and submits signed forms to CLPD for signature prior to the activity.
7. Corresponds with the faculty and collects Conflict of Interest Forms (facilitates resolution of conflict with Activity Director or Nurse Planner, if needed), secures course materials, manages travel and accommodations arrangements, payment of honoraria, etc.
8. Arranges all activity logistics including securing conference space (internal and external) and securing and directing the caterer (provide menu selection, counts, and give outside direction).
9. Takes Planning Committee meeting minutes or delegates to appropriate staff.
10. Prepares and submits applications for special accreditations (i.e., NASW, ASRT) and follows Sponsor responsibilities in accordance with the accrediting bodies’ requirements.
11. Prepares and monitors draft budget through final accounting for the activity.
12. Prepares and finalizes marketing material information and submits accurate Marketing Intake Form to CLPD production staff (if utilizing CLPD marketing services).
13. Produces final course materials and prepares packets or collaborates with CLPD website staff if handouts are being distributed online.
14. Produces participant list, nametags and labels for packets (if desired) using registration data provided by CLPD if using CLPD registration service.
15. Follows the CLPD registration procedure.
16. Processes payments for all activity expenses through D-H Accounts Payable.
17. Provides AV support or delegates a resource to do so.
18. Staffs the event the day(s) of the activity and manages registration and event logistics.
19. Collects and returns to the CLPD all accreditation and registration related paperwork in a timely manner.

**Live CME Activities: Center for Learning and Professional Development Responsibilities**

1. **Program Planning**
   1. Provides link to Continuing Medical and/or Nursing Education Activity Submission Portal for developing the conceptual framework and logical considerations of the CME activity including the target audience, purpose and learning objectives, program description, faculty, etc.
   2. Designates appropriate number of *AMA PRA Category 1 Credits*.
   3. Documents evaluation and outcome measure process.
2. **Commercial Grant Support**
   1. Submits online “grant” requests to commercial donors. D-H considers commercial “grants” from drug and device companies to be “commercial donations” and, therefore, Activity Directors and Nurse Planning Committees must provide appropriate documentation, including needs assessment and budgets, to the CLPD for timely online submissions to the commercial donors.
   2. Only Activity Directors and Nurse Planning Committees with an activity budget showing a financial need can apply for a commercial donation.
   3. Donation requests will be limited to a maximum of five submissions directly related to therapeutic areas addressed in the learning objectives and content.
3. **Program Promotion and Registration**
   1. Generates standard direct mail marketing design for print materials using standard D-H, GSMD, and ANCC Accredited Provider status branding.
   2. Reviews all promotional materials for compliance with ACCME guidelines.
   3. Ensures correct use of accreditation and credit designation statement.
   4. Compiles targeted mailing lists from the CLPD and Referring Physician’s databases.
   5. Creates limited email marketing campaigns using current CLPD email address list.
   6. Posts activity listing on CLPD website for world-wide audience with links to online registration.
   7. Facilitates participant registration online through the CLPD website.
4. **Evaluation/Outcome Measures/Maintenance of Records**
   1. Produces and administers online Activity Evaluations and Evaluation Summaries of each activity (mandated for accreditation, compliance, and quality) for Activity Directors (CME) and Nurse Planning Committees (CNE).
   2. Produces and administers online activity Outcome Measures and Analysis Summaries for Activity Directors (CME) and Nurse Planning Committees (CNE) of each activity (mandated for accreditation, compliance, and quality.
   3. Provides annual reporting of teacher, learner credit/contact hours, and other data to D-H and GSMD leadership including Board of Trustees, Board of Governors, and Dean’s office.
5. **Online Credit Transcripts**
6. Awards or designates CME credits and/or CNE contact hours and processes to individuals’ online transcript.
7. Responds to inquiries from learners regarding credit transcripts.