

<b>Policy Title:</b>	<b>Lead Planner Eligibility for a Dartmouth Health Accredited Continuing Education (ACE) Activity</b>	<b>Policy ID:</b>	<b>Reference #</b>
<b>Keywords</b>	continuing education, CE, CME, continuing medical education, CNE, continuing nursing education, learning activity, relevant financial relationship, disclosure, mitigation, resolution, attestation form, relationship with industry, commercial interest, ineligible company, activity director, nurse planner, accredited, Live Activity, Conference, Course, Symposium, Regularly Scheduled Series, Grand Rounds, Morbidity and Mortality, Case Conferences, Journal Clubs, Enduring Material, online learning activities, Lead Planner, IPCE, JA, Joint Accreditation, Pharmacy, planning committee, ACE, Accredited Continuing Education		

### **I. Purpose of Policy**

The purpose of this policy is to define eligibility for official status as a Lead Planner a Dartmouth Health Accredited Continuing Education (ACE) Activity. This status is a privilege that ties directly to the awarding of credit/contact hours associated with credentialing and licensure of healthcare professionals. The Lead Planner of a Dartmouth Health ACE Activity is responsible for the educational excellence and fiscal integrity of the Activity to protect the interests of Dartmouth Health member organizations, the Veterans Administration Medical Center (VAMC), the Geisel School of Medicine at Dartmouth, Geisel School of Medicine at Dartmouth faculty, learners, patients and their families, and the general public.

### **II. Policy Scope**

The scope of this policy includes: all Dartmouth Health employees; all individuals with an official, current faculty appointment from the Geisel School of Medicine at Dartmouth; and all employees' and faculty members' administrative staff. The scope of this policy also covers all lead planner and interprofessional planning committee members, speakers, authors, and anyone else in a position to control the content of an ACE activity.

### **III. Definitions**

**Accredited Continuing Education (ACE) Activity** – An ACE Activity is an educational offering (e.g., Live Activity/Conference/Course/Symposium, Regularly Scheduled Series/Grand Rounds/Morbidity and Mortality/Case Conferences/Journal Clubs, Enduring Material/online learning activities) that is planned, implemented, and evaluated in accordance with the Joint Accreditation Criteria associated Dartmouth Health policies and protocols.<sup>1</sup>

### **ACCME Standards for Integrity and Independence in Accredited Continuing Education -**

The *ACCME Standards for Integrity and Independence in Accredited Continuing Education* are the rules that ACE providers, including Dartmouth Health, must follow when receiving and managing commercial support (grants) for an Activity. Revenues that ACE providers receive from industry for advertising and exhibits associated with an Activity are **not** considered commercial support but, rather, business transactions which also have management guidelines to assure independence.<sup>2</sup>

### **IV. Policy Statement**

The determination of eligibility for qualifying as an approved Lead Planner rests with the Medical Director for IPCE/Associate Dean for CME at Geisel School of Medicine at Dartmouth, Dartmouth Health Vice President, Center for Learning and Professional Development (CLPD); the Director of Nursing Professional Development, Center for Nursing Excellence; and the System Director of Clinical Pharmacy.

A qualified CME Lead Planner must meet all of the following criteria:

1. be a physician, researcher, doctorally prepared professional who possesses an official, current or emeritus/a faculty appointment from the Geisel School of Medicine at Dartmouth;
2. be an employee in good standing of a Dartmouth Health Member Organizations, the VAMC, or the Geisel School of Medicine at Dartmouth;

A qualified CNE Lead Planner must meet the following criteria:

1. be an active member of the Nursing Continuing Education Council (NCEC),
2. be an employee in good standing of a Dartmouth Health Member Organizations.

A qualified Pharmacy Lead Planner must meet the following criteria:

1. be a pharmacist who is actively engaged in practice and holds a current license,
2. be an employee in good standing of a Dartmouth Health Member Organizations.

All Lead Planners must meet the following criteria:

1. take responsibility for oversight of the educational quality of the Activity;
2. take responsibility for oversight of the financial integrity of the Activity;
3. be accountable for meeting all Dartmouth Health policies and procedures including required reporting related to the Activity;
4. be committed to reporting and disclosing all personal financial relationships or lack thereof in accordance with the *Dartmouth Health Financial Disclosure and Agreement Form*;
5. be committed to, if necessary, having their own personal relevant financial relationship mitigated under the prescribed process and with the intervention of Medical Director for IPCE/Associate Dean for CME at Geisel School of Medicine at Dartmouth, Dartmouth Health Vice President, Center for Learning and Professional Development (CLPD); the Director of Nursing Professional Development, Center for Nursing Excellence; and the System Director of Clinical Pharmacy, or a peer reviewer;
6. be committed to mitigating individuals' relevant financial relationships, or the lack thereof, of all planning committee members, speakers, authors or others with ability to control content of the activity, and reporting that information transparently; and,
7. be committed to implementing all of the *ACCME Accreditation Criteria and Standards for Integrity and Independence in Accredited Continuing Education*.

## **V. References**

<sup>1</sup> *Joint Accreditation Criteria* – [Joint Accreditation Criteria | Joint Accreditation](#).

<sup>2</sup> *ACCME Standards for Integrity and Independence in Accredited Continuing Education* – [Standards for Integrity and Independence in Accredited Continuing Education | ACCME](#)

<b>Responsible Owner:</b>	Center for Learning and Professional Development	<b>Contact(s): email</b>	clpd.support@hitchcock.org
<b>Approved By:</b>	Dartmouth Health Medical Director for IPCE/Associate Dean for CME at Geisel School of Medicine at Dartmouth, Vice President of CLPD, Executive Vice President of DHMC	<b>Version #</b>	Version
<b>Current Approval Date:</b>	Approved: October 2007 Revised: March 2008, November 2010, August 2014, January 2021, May 2022, September 2023	<b>Old Document ID:</b>	N/A
<b>Date Policy to go into Effect:</b>	Date Approved: November 2010		
<b>Related Policies &amp; Procedures:</b>	Lead Planner Eligibility for a Dartmouth Health Accredited Continuing Education (ACE) Activity, Dartmouth Health Policy on the Refusal/Failure to Disclose or Mitigate Relationships for an Accredited Continuing Education (ACE) Activity		
<b>Related Job Aids:</b>			

