

Departmental Policy	Lead Planner Eligibility for a Dartmouth Health Accredited Continuing Education (ACE) Activity Policy	ID	31279
Keywords	continuing, education, CE, ACE, CME, medical, CNE, nursing, learning, activity, relevant, financial, relationship, disclosure, mitigation, resolution, attestation, form, relationship, industry, commercial, interest, ineligible, company, activity, director, nurse, planner, accredited, live, activity, conference, course, symposium, regularly, scheduled, series, grand, rounds, morbidity, mortality, case, journal, club, enduring, material, online, learning, lead, planner, IPCE, JA, joint, accreditation, pharmacy, planning, committee, ACE, accredited continuing, education		
Department	Center for Learning and Professional Development		

I. Purpose of Policy

The purpose of this policy is to define eligibility for official status as a Lead Planner for 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 and partners (at leadership discretion).

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 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.¹

ACCME Standards for Integrity and Independence in Accredited Continuing Education – The Accreditation Council for Continuing Medical Education (ACCME®) Standards for Integrity and Independence are the rules that ACE providers, including Dartmouth Health, must follow. The Standards are designed to ensure that accredited continuing education serves the needs of patients and the public; present learners with only accurate, balanced, scientifically justified recommendations; assure healthcare professionals and teams that they can trust accredited continuing education to help them deliver safe, effective, cost-effective, compassionate care that is

based on best practice and evidence; and create a clear, unbridgeable separation between accredited continuing education and marketing and sales.

IV. Policy Statement

The determination of eligibility for qualifying as an approved Lead Planner rests with the Medical Director & Associate Dean for Interprofessional Educational Practice (IPEP), Vice President for CLPD, Director of ACE, and the interprofessional accreditation system directors.

- A qualified Lead Planner must meet the following criteria:
 1. Be an employee in good standing of a Dartmouth Health Member Organization or one of Dartmouth Health partners.
 2. Has experience/training in providing continuing education.
 3. Takes responsibility for the oversight of the financial integrity, provides activity reporting and maintains accountability for adhering to all Dartmouth Health financial policies and procedures related to the activity.
 4. Ensures the planning committee is comprised of appropriate representation of the target audience and accreditation type as follows:
 - a. For continuing medical education activities, a Dartmouth Health healthcare provider, researcher, or doctorally prepared professional.
 - b. For continuing nursing education activities, a Dartmouth Health RN, DNP, APRN or CNM.
 - c. For pharmacy activities, the designated Dartmouth Health pharmacist.
 - d. For social work activities, the designated Dartmouth Health social worker.
 - e. As additional accreditation professions are added to Dartmouth Health accreditation types provided, representation of those professions is included as well.

V. References

¹ *Joint Accreditation Criteria* – [Joint Accreditation Criteria | Joint Accreditation.](#)

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

Responsible Owner:	Center for Learning and Professional Development	Contact:	Melinda Potter
Approved By:	Office of Policy Support (OPS), Dwayna Covey, Maxwell Vergo	Version #	2
Current Approval Date:	02/22/2025	Old Document ID:	
Date Policy to go into Effect:	02/22/2025		
Related Policies & Procedures:	Dartmouth Health Policy on the Refusal/Failure to Disclose Relationships with Ineligible Companies for an Accredited CE Activity		
Related Job Aids:			