Regularly Scheduled Series Guidelines

A regularly scheduled series (RSS) as a course that is planned as a series with multiple, ongoing sessions, e.g., offered weekly, monthly, or quarterly; and is primarily planned by and presented to the accredited organization’s professional staff. Examples include grand rounds, tumor boards, journal clubs, and morbidity and mortality conferences. In order to receive credit for an RSS, the following are required for compliance with Joint Accreditation guidelines.

1. **Application/Needs Assessment:** Each educational activity must serve to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a physician uses to provide services for patients, the public, or the profession. This information is documented in the application and supporting documents.

2. **Budget Management:** Each educational activity must have a budget reflecting all activity revenue and expenses (e.g. costs of food, materials, room rental, honoraria, accreditation fees, etc.). You will be asked to submit a preliminary budget with your application/renewal and a final budget at the end of the fiscal year.

3. **Educational Support:** If there is any educational support (i.e. grants, exhibits, donations, etc.) provided for the activity, OCPD must be notified prior to the session and receipt of the funds. ACCME requires a letter of agreement (LOA) to be completed prior to receipt of the funds.
   3.1. If you anticipate receiving educational support notify OCPD to discuss in advance of your activity.
   3.2. **Acknowledgement of Support:** If educational support is received, this support must be appropriately acknowledged on-site to the participants. An appropriate acknowledgement of support should list the company name and may not include any logos or product-specific advertising. The participants must be able to easily identify this support.

4. **Accreditation/Certification:** Providership and Designation / Credit Statement must be present on all promotional material (e.g. flyers, emails, brochures, etc.). This statement will be provided to you verbatim for you to include on your promotional materials.

5. **Presenter Disclosure/Attestation/Consent:**
   5.1. **Disclosure:** The Course Director and planning committee members must complete a disclosure prior to your FY20 RSS being approved by OCPD. A link to the online disclosure for Course Directors and planning committee members is included in the application materials.
   5.2. All presenters must complete a disclosure and an attestation/consent PRIOR to the activity. This disclosure must be reviewed by the Course Director and any conflict relevant to the lecture topic must be managed, resolved and documented PRIOR to the session. The Course Director will document this review on the COI grid.
   5.3. **Conflict of Interest (COI) grid** must be completed for the series. This is a summary of the presenter’s documentation of disclosure completion, risk of conflict, and any required action to Regularly Scheduled Series Guidelines

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resolve this potential conflict. The Course Director will document the risk of conflict, any action required to insure an unbiased presentation, the completion of that action, and date completed.

5.4. **Disclosure Summary** must be presented in writing and/or verbally to the participants at each session, even if there is nothing to disclose. This may be noted on the sign-in sheet, presenter’s slides or handouts, or mentioned by the presenter at the beginning of their presentation.

6. **Sign-in/Attendance spreadsheet:** All participants must sign-in on paper or electronically to each activity with name and designation. This is their validation of participating in the activity. An attendance tracking worksheet must be completed for the series, listing all attendees and which sessions they attended, with summary totals of physicians, residents and other healthcare professionals.

7. **Session objectives, summary or presentation slides:** Each session must have the content documented by objectives, a summary, or presentation slides.

8. **Evaluation Summary:** Participants must have the opportunity to evaluate the series. This can be done at each session, periodically or once for the entire series. This is how you can measure if there were changes in competence, performance, or patient outcomes, as well as ask for suggestions for future topics. Review Evaluation Guidelines.

**Required Documentation**
The following must be submitted to the Office of Continuing Professional Development (OCPD) at least quarterly. Documentation will be retained by OCPD for Joint Accreditation audit.

Per series:
- Attendance spreadsheet
- COI grid (with risk assessment & resolution details)
- Evaluation summary/ies (per frequency indicated on application)

Per session:
- Session Checklist
- Session objectives, summary, or presentation slides
- Flyer or explanation of how accreditation information was provided to attendees