**Joint Providership Full Application**

**Purpose:**

This document is designed to ensure that CME activities considered for certification meet the Accreditation Council for Continuing Medical Education (ACCME) criteria.

**Instructions:**

Please fill this out completely and include the required attachments. For conference/symposium, **please allow at least six months** to ensure adequate planning and coordination. If you need additional information, please contact the ASMBS CME Compliance Manager:

**Organization Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
Meeting Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Location & Date(s):** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Main Contact Information:**

**Name:**

**Role:**

**Street Address:**

**Phone Number:**

**Email:**

**Checklist of items that MUST be received with this application:**

☐ Additional Course Director Disclosure Information (if not submitted w/the Letter of Intent)

☐ ALL Faculty Disclosure Information

☐ Commercial Support documentation

☐ Letter of Agreements

☐ Financial Tracking

☐ Sponsor Recognition

☐ Educational Planning Information

☐ Overview of meeting goals or minutes from program planning meeting

☐ Professional practice gap(s) of your learners on which the activity was based

☐ Educational Needs

☐ Educational Needs that were determined to be the cause of the professional practice gap(s)  
 ☐ Designed to change description

☐ Educational format explanation

☐ Competencies submission

☐ Completed course outline

☐ State Chapter mission statement

☐ Submissions of materials agreement & timeline acknowledgment

**ASMBS Policy on Disclosure**

ASMBS requires all planners, directors, speakers, and staff to comply with the [ACCME’s Standards for Integrity and Independence](https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce). ASMBS state chapter planners, directors, and speakers’ disclosures are to be collected prior to the start of developing and/or agreeing to participate in an activity. In accordance with the ACCME’s Standards for Integrity and Independence, the ASMBS requires disclosure of all financial relationships and nature of that relationship with ineligible companies, for the **past 24 months.**

**Examples of eligible companies include:**

*Those whose mission and function are: (1) providing clinical services directly to patients; or (2)*

*the education of healthcare professionals; or (3) serving as fiduciary to patients, the public, or*

*population health: and other organizations that are not otherwise ineligible.*

Examples of such organizations include:

* Ambulatory procedure centers
* Blood banks
* Diagnostic labs that do not sell proprietary products
* Electronic health records companies
* Government or military agencies
* Group medical practices
* Health law firms
* Health profession membership organizations
* Hospitals or healthcare delivery systems
* Infusion centers
* Insurance or managed care companies
* Nursing homes
* Pharmacies that do not manufacture proprietary compounds
* Publishing or education companies
* Rehabilitation centers
* Schools of medicine or health science universities
* Software or game developers

**Examples of ineligible companies include:**

*Those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.*

* Examples of such organizations include:
* Advertising, marketing, or communication firms whose clients are ineligible companies
* Bio-medical startups that have begun a governmental regulatory approval process
* Compounding pharmacies that manufacture proprietary compounds
* Device manufacturers or distributors
* Diagnostic labs that sell proprietary products
* Growers, distributors, manufacturers or sellers of medical foods and dietary supplements
* Manufacturers of health-related wearable products
* Pharmaceutical companies or distributors
* Pharmacy benefit managers
* Reagent manufacturers or seller

**ASMBS Policy on employees and owners of ineligible companies**

Owners and employees of ineligible companies are considered to have unresolvable financial relationships. It is the policy of the ASMBS that these individuals must be excluded from participating as planners or faculty and must not be allowed to influence or control any aspect of the planning, delivery, or evaluation of accredited continuing education except in the limited circumstances outlined in the [ACCME’s Standards for Integrity and Independence Standard 3.2](https://www.accme.org/faq/standard-32-what-are-some-examples-content-or-not-related-business-lines-ineligible-company).

In accordance with the Standards for Integrity and Independence, the ASMBS considers owners and employees as individuals who have a legal duty to act in the company's best interests. Owners are defined as individuals who have an ownership interest in a company, except for stockholders of publicly traded companies, or holders of shares through a pension or mutual fund. Employees are defined as individuals hired to work for another person or business (the employer) for compensation and who are subject to the employer's direction as to the details of how to perform the job.

**Determination of relevant relationships**

Upon receipt of your disclosure information, we will review the disclosure to determine whether your financial relationships are relevant to the education. Please note: the identification of relevant financial relationships does not necessarily mean that you are unable to participate in the planning and implementation of this educational activity. Rather, the accreditation standards require that relevant financial relationships are mitigated before you assume your role in this activity. Financial relationships are relevant and will be subject to mitigation if the following three conditions are met for the prospective person who will control content of the education:

1. A financial relationship, in any amount, exists between the person in control of content and an ineligible company.
2. The financial relationship existed during the past 24 months.
3. The content of the education is related to the products of an ineligible company with whom the person has a financial relationship.

**Mitigation of relevant financial relationships**

Using the lists below, we will identify which mitigation strategy(ies) will be used for all persons with relevant financial relationships (as described in determination of relevant relationships) who control the educational content of the educational activity.

The following are the mitigation steps for planners:

* Divest the financial relationship
* Recusal from controlling aspects of planning and content with which there is a financial relationship
* Peer review of planning decisions by persons without relevant financial relationships

The following are the mitigation steps for faculty and others:

* Divest the financial relationship
* Peer review of content by persons without relevant financial relationships
* Attest that clinical recommendations are evidence-based and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines)

**ASMBS State Chapter planners, course directors, and faculty disclosures are to be collected prior to the start of developing and/or agreeing to participate in an activity. List all planners and directors below. This letter of intent will not be approved until we have received all disclosures.**

[**https://asmbs.org/financial-relationship-disclosure-form**](https://asmbs.org/financial-relationship-disclosure-form)

**Course Director(s) if not submitted with the Letter of Intent**

Additional Course Director (Name and Email):        
Additional Course Director (Name and Email):

**Faculty/Presenters:**

Presenter (Name and Email):        
Presenter (Name and Email):        
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Presenter (Name and Email):

I have verified that all course directors, faculty/presenters, and planners have submitted the required disclosure information: ☐ YES ☐ NO

**Communicating Disclosure**

It is the responsibility of the chapter to inform learners that speakers and those in control of content provided the appropriate disclosure prior to the start of an activity. The chapter must send a copy or screenshot of how this information was communicated prior to the start of the activity.

**Examples of how to communicate:**

* Handout
* Link on website
* Slides

**Examples of language to use when informing learners:**

For planners and speakers who have indicated they have ***nothing to disclose:***

The following planners and speakers have indicated that they have **no financial relationships with ineligible companies**

John Smith  
Mary Major  
Richard Miles  
Suzie Stiles

For planners and speakers who disclosed a **relevant financial relationship**:

The following planners and speakers have indicated a relevant financial relationship with ineligible companies- all relevant financial relationships have been mitigated.

John Smith ABC Company Consultant   
Mary Major BBB Company Researcher   
Richard Miles RTI Company Advisor   
Suzie Stiles ZZZ Company Speaker

**Commercial Support**

1. Will commercial exhibits be a component of this activity? *If yes, review ACCME Standard 5- listed below*

☐ YES ☐ NO

1. Will commercial sponsorships be a component of this activity? *If yes, review ACCME Standard 4 & 5- listed below*

☐ YES ☐ NO

1. Will you be applying for educational grants for this activity? *If yes, review ACCME Standard 4-listed below*

☐ YES ☐ NO

**If no is selected for all the above questions, the applicant may skip this section.**

**ASMBS must receive the following if commercial support is received:**

1. Copies of all Letters of Agreement (LOA). LOA(s) must be signed by both the State Chapter, the commercial supporter and ASMBS.
2. Copies or screenshots of all prepared listings, advertisements or posters acknowledging the commercial supporter prior to distribution to the attendees for approval:
   1. Program book/agenda cannot contain corporate logos
   2. Corporate logos cannot be displayed near education
   3. Live sponsored activities must not occur in the educational space within 30 minutes before or after an accredited education event.

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[**ACCME Standard 4: Manage Commercial Support Appropriately**](https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-4-manage-commercial-support-appropriately)

Accredited providers that choose to accept commercial support (defined as financial or in-kind support from ineligible companies) are responsible for ensuring that the education remains independent of the ineligible company and that the support does not result in commercial bias or commercial influence in the education. The support does not establish a financial relationship between the ineligible company and planners, faculty, and others in control of content of the education.

1. **Decision-making and disbursement:** The accredited provider must make all decisions regarding the receipt and disbursement of the commercial support.
   1. Ineligible companies must not pay directly for any of the expenses related to the education or the learners.
   2. The accredited provider may use commercial support to fund honoraria or travel expenses of planners, faculty, and others in control of content for those roles only.
   3. The accredited provider must not use commercial support to pay for travel, lodging, honoraria, or personal expenses for individual learners or groups of learners in accredited education.
   4. The accredited provider may use commercial support to defray or eliminate the cost of the education for all learners.
2. **Agreement:** The terms, conditions, and purposes of the commercial support must be documented in an agreement between the ineligible company and the accredited provider. The agreement must be executed prior to the start of the accredited education. An accredited provider can sign onto an existing agreement between an accredited provider and a commercial supporter by indicating its acceptance of the terms, conditions, and amount of commercial support it will receive.
3. **Accountability:** The accredited provider must keep a record of the amount or kind of commercial support received and how it was used, and must produce that accounting, upon request, by the accrediting body or by the ineligible company that provided the commercial support.
4. **Disclosure to learners:** The accredited provider must disclose to the learners the name(s) of the ineligible company(ies) that gave the commercial support, and the nature of the support if it was in-kind, prior to the learners engaging in the education. Disclosure must not include the ineligible companies’ corporate or product logos, trade names, or product group messages.

[**Standard 5: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education**](https://www.accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce/standard-5-manage-ancillary-activities-offered-conjunction-accredited)

This standard only applies when there is marketing by ineligible companies or nonaccredited education association with the accredited continuing education.

Accredited providers are responsible for ensuring that education is separate from marketing by ineligible companies—including advertising, sales, exhibits, and promotion—and from nonaccredited education offered in conjunction with accredited continuing education.

1. Arrangements to allow ineligible companies to market or exhibit in association with accredited education must not:
   1. Influence any decisions related to the planning, delivery, and evaluation of the education.
   2. Interfere with the presentation of the education.
   3. Be a condition of the provision of financial or in-kind support from ineligible companies for the education.
2. The accredited provider must ensure that learners can easily distinguish between accredited education and other activities.
   1. **Live continuing education activities:** Marketing, exhibits, and nonaccredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled and communicated as such.
   2. **Print, online, or digital continuing education activities**: Learners must not be presented with marketing while engaged in the accredited education activity. Learners must be able to engage with the accredited education without having to click through, watch, listen to, or be presented with product promotion or product-specific advertisement.
   3. **Educational materials** that are part of accredited education (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) must not contain any marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages.
   4. **Information distributed about accredited education** that does not include educational content, such as schedules and logistical information, may include marketing by or for an ineligible company.
3. Ineligible companies may not provide access to, or distribute, accredited education to learners.

**If yes is selected for any of the above, I attest that I read and understand the above ACCME Standards for Integrity and Independence 4 & 5 and will comply by submitting all the requested materials.**

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Printed Name:**

**Date:**

**Commercial Support Tracking**Please list all the companies for which you have secured or requested financial support. Select the choice that applies to the type of commercial support each company will provide. You will need to collect all LOA(s) and provide the dually signed copy to ASMBS prior to the event. Failure to provide copies prior to the event will result in the loss of ASMBS providing credits for the activity.

| **Company** | **Type of Commercial Support Received** | **Dually Signed LOA** | **Date sent to ASMBS** |  |
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**Validity of Content & Education Planning**

**Validity of Content**

As an important contributor to our accredited education, we would like to enlist your help to ensure that educational content is fair and balanced, and that any clinical content presented supports safe, effective patient care. This includes the expectations that:

* All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options.
* All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
* Although accredited continuing education is an appropriate place to discuss, debate, and explore new and evolving topics, these areas need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.
* Content cannot be included in accredited education if it advocates for unscientific approaches to diagnosis or therapy, or if the education promotes recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.

These expectations are drawn from **Standard 1** of the ACCME Standards for Integrity and Independence in Accredited Continuing Education. For more information, see [accme.org/standards](http://accme.org/standards). If we can help you to understand and/or apply these strategies to your education, please contact us.

Although accredited CE is an appropriate place to discuss, debate, and explore new and evolving topics, presenting topics or treatments with a lower (or absent) evidence base should include the following strategies:

* Facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning
* Construct the activity as a debate or dialogue. Identify other faculty who represent a range of opinions and perspectives; presentations should include a balanced, objective view of research and treatment options.
* Teach about the merits and limitations of a therapeutic or diagnostic approach rather than how to use it.
* Identify content that has not been accepted as scientifically meritorious by regulatory and other authorities, or when the material has not been included in scientifically accepted guidelines or published in journals with national or international stature.
* Clearly communicate the learning goals for the activity to learners (e.g., “This activity will teach you about how your patients may be using XX therapy and how to answer their questions. It will not teach you how to administer XX therapy”).

Consider using the following best practices when presenting clinical content in accredited CE:

* Clearly describe the level of evidence on which the presentation is based and provide enough information about data (study dates, design, etc.) to enable learners to assess research validity.
* Ensure that, if there is a range of evidence, that the credible sources cited present a balanced view of the evidence.
* If clinical recommendations will be made, include balanced information on all available therapeutic options.
* Address any potential risks or adverse effects that could be caused with any clinic

One strategy to ensure the clinical content validity of accredited continuing education is to allow external (peer) review by persons with appropriate clinical expertise and no relevant financial relationships with ineligible companies, defined as those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. The questions above direct reviewers to share feedback about each of the requirements that comprise Standard 1 in the Standards for Integrity and Independence. For more information, see [accme.org/standards](http://accme.org/standards.).

**Educational Planning**

**Educational Needs**

The provider incorporates into CME activities the educational needs (knowledge, competence, or performance) that underline the professional gaps of their own learners.

1. Provide the professional practice gap(s) of your learners on which the activity was based.

*Example:*

1. Check the educational need(s) that apply to this activity:

☐ Knowledge

☐ Competence

☐ Performance

1. State the educational need(s) that you determined to be the cause of the professional practice gap(s).

**Objectives**: What are the objectives and/or purpose of this activity? *Terminology for*

*educational objectives usually begins with, “Following this activity, the participant should be*

*able to...” followed by the phrases that communicate a performance capability by the*

*participant. Use verbs such as: describe, analyze, discuss, compare, differentiate, examine,*

*formulate, propose, assess, measure, select, and choose.*

1.

2.

3.

4.

5.

**Designed to Change**

The provider generates activities/educational interventions that are designed to change competence, performance or patient outcomes as described in its mission statement.

Explain what competence, performance, or patient outcome this activity was designed to change.

**Appropriate Formats**

The provider chooses educational formats for activities/inventions that are appropriate for the setting, objectives, and desired results of the activity.

*Learning Format Selected: Live Course*

Explain why the educational format is appropriate for this activity.

**Competencies**The provider develops activities/educational interventions in the context of desirable physician attributes (competencies).

Select the desirable physician attribute(s) this activity addresses.

Select all that apply:

☐ Patient care and procedural skills

☐ Medical knowledge

☐ Quality improvement

☐ Practice-based learning and improvement

☐ Interpersonal and communication skills

☐ Professionalism

☐ Systems-based practice

☐ Provide patient-centered care

☐ Work in interdisciplinary teams

☐ Employ evidence-based practice

☐ Utilize informatics

☐ Values/ethics for interprofessional practice

☐ Roles/responsibilities

☐ Interprofessional communication

☐ Teams and teamwork

Please list other competencies, if applicable:

**Mission Statement**

Please submit your state chapter’s mission statement here: