

CME Activity Planstone CME Container DISCLOSURE HIGH-LEVEL PROCESS for Activity Manager (AM) and SuperUser (SU) *2024*

➤ **USE CONTAINER NAMED: EDCME24: 2024 CME DISCLOSURES**

Working with your Planning Group to create a CME bearing activity? Contact the Accreditation Team to discuss your CME request at accreditation@aap.org



Step 1: CREATE ROSTER

AM TO CREATE ROSTER THAT INCLUDES PLANNERS, STAFF, MODERATORS, REVIEWERS, FACULTY, PANELIST, ETC., (ANYONE AFFECTING CONTENT). PROVIDE ROSTER TO SU AT THIS POINT. YOU MAY NOT HAVE FACULTY CONFIRMED, THAT IS FINE, YOU CAN PROVIDE AN UPDATED ROSTER TO YOUR SU TO ADD INDIVIDUALS ONCE FACULTY IS CONFIRMED.



Step 2: SUPERUSER IN PLANSTONE

- **USE CONTAINER NAMED: EDCME24: 2024 CME DISCLOSURES**
- **SU LOGS INTO PLANSTONE TO CREATE ACTIVITY AND ADD INDIVIDUALS**
- **TAB AT TOP OF SCREEN → CLICK ON CME ACTIVITIES**
- **TAB ON RIGHTSIDE OF SCREEN → CLICK ON ADD A NEW CME ACTIVITY**
- **NAME THE ACTIVITY (CME ACTIVITY TYPE IS GENERAL)**
- **SEARCH FOR INDIVIDUALS AND ADD THEM TO NEWLY CREATED ACTIVITY**
- **SU MUST ADD THE ROLE AND TOPIC/CONTENT AREA OF THE INDIVIDUAL**
- **IF AN INDIVIDUAL IS NOT IN PLANSTONE, SU SHOULD ADD THE INDIVIDUAL AND SEND THEM A DISCLOSURE REQUEST LINK**
- **IF YOU SEE THE DISCLOSURE HAS BEEN SENT, BUT NOT COMPLETED, SU SHOULD SEND A REMINDER TO DISCLOSE, WITH A DUE DATE**

NEVER Use Leadership Container for CME activities. Disclosures in Leadership container CANNOT be transferred to CME container.



Step 3: SU & AM - MONITOR DISCLOSURES

- **AM & SU** are responsible for monitoring disclosures to ensure they are received and sent for review in a timely manner.
- If an individual has completed their disclosure – and **DOES NOT** have financial relationships, their disclosure is complete, no further action needed.
- If an individual **HAS FINANCIAL RELATIONSHIPS**, these will need to be reviewed and mitigated, prior to the start of the activity, by Dr Haftel. **Audit report should be sent to your accreditation point person (Either Virginia or Amanda) for mitigation.**

REMINDER: Per AAP Board Policy, Dr Haftel is the only person that is allowed to review/mitigate financial relationships for CME bearing activities.



Step 4: SU - GENERATE AUDIT REPORT

- Tab at top of screen → Click on **Disclosure**
 - Search for **CME Activity Title**
 - Tab on right side of screen → Click **Audit Report (PDF)**
 - **Save Audit Report and send to your accreditation point person (Either Virginia or Amanda)**
- ✓ Audit report can be generated several times for review. If most disclosures have been received, send audit report to your accreditation point person. She will work with Dr Haftel to review/mitigate. **Do not wait until the last moment to send.** Report does not need to be 100% complete to send relationships for review.



Step 5: REVIEW/MITIGATION PROCESS

- For disclosures collected in the CME container, they will NOT be mitigated until the individual has been identified as a planner/faculty/reviewer/moderator etc. for a CME-bearing activity. The mitigation will occur once we know what the topic/content is that the individual is associated with for the activity. Therefore, all disclosures will sit unmitigated in the CME container until the individual is tied to an activity. DO NOT go to COIMAC for mitigation.
- **All individuals affecting content/ associated with activity must disclose and have disclosure reviewed/mitigated prior to activity launch. NO EXCEPTIONS.**
- Accreditation Team will work directly with Dr Haftel for review/ mitigation of financial relationships reported. **Dr Haftel is the sole reviewer/mitigator for the CME container per Board Policy.**
- **AM and SU MUST NOT** contact Dr Haftel directly.



Step 6: REVIEW/MITIGATION TIMELINE

- It is extremely important that the **AM** and **SU** monitor disclosure and submit information to Virginia in a timely manner.
- Once audit report is sent to Virginia, she will work with Dr Haftel.
- A minimum of **5 days** for review is required to ensure Dr Haftel has ample time to complete the request prior to the activity launch date. Dr Haftel is the sole reviewer/mitigator for AAP CME Activities.



Step 7: DISCLOSURE PROCESS COMPLETE

Once Dr Haftel has completed the review/ mitigation of relationships, Accreditation Team will reach out to the **AM** to provide the update and next steps regarding the CME verification requirements.

CME Activity Planstone CME Container DISCLOSURE HIGH-LEVEL PROCESS for Activity Manager (AM) and SuperUser (SU) *2024*

➤ **USE CONTAINER NAMED: EDCME24: 2024 CME DISCLOSURES**



- All disclosures must be collected, reviewed, and mitigated prior to start date of activity, **no exceptions** (disclosure process that is not complete before activity launch will not be able to designate CME/MOC for that specific activity).
 - Each activity requires its own separate review/mitigation as the content/topics will vary and may affect the mitigation plan.
 - If there are specific mitigation methods for one relationship vs the other, Dr Haftel will add clarifying information in the notes section.
 - All relationships with ineligible companies **MUST** be shared with learners via the disclosure grid, regardless of the mitigation.
- CME CANNOT be retroactively granted after an activity has launched.
- Disclosures should always be collected for planners, presenters, authors, staff, moderators, coaches/trainers, reviewers, panelists, question writers, anyone else affecting content of the activity.
 - Disclosure requests should be sent out when it is determined the activity will award CME credit (can occur before CME abstract has been submitted).
- It is the sole responsibility of the **AM** and **SU** to follow up with all parties and ensure all steps are completed prior to activity launch.