

In accordance with the Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Support, St. David's HealthCare (SDH) CME Dept. has established the following guidelines for meeting planners. All guidelines are expected to be implemented as listed below in order to ensure compliance throughout each planning phase of commercially supported activities. Please direct any questions regarding these guidelines to Christine Rocha at Christine.Rocha@stdavids.com.

The Standards for Commercial Support: Standards to Ensure Independence in CME ActivitiesSM are designed to ensure that CME activities are independent and free of commercial bias. All accredited CME providers and their joint providers are responsible for complying with the Standards for Commercial Support and the policies that supplement the Standards. Please visit the [Standards for Commercial Support Resources page for additional information and supplemental materials](#).

Definitions

Accredited Provider – the institution or organization accredited by the ACCME or a state medical society to award *AMA PRA Category 1 Credit*TM to a continuing medical education activity. In this case, St. David's HealthCare (SDH) is the accredited provider.

Commercial Interest- any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. The ACCME does not consider providers of clinical service directly to patients to be commercial interests - unless the provider of clinical service is owned, or controlled by, an ACCME-defined commercial interest

A commercial interest is not eligible for ACCME accreditation. Commercial interests cannot be accredited providers and cannot be joint providers (SCS Standard 1.2). Within the context of this definition and limitation, the ACCME considers the following types of organizations to be eligible for accreditation and free to control the content of CME:

- Government organizations
- Non-health care related companies
- Liability insurance providers
- Health insurance providers
- Group medical practices
- For-profit hospitals
- For profit rehabilitation centers
- For-profit nursing homes
- Blood banks
- Diagnostic laboratories
- 501-C Non-profit organizations (Note, ACCME screens 501c organizations for eligibility. Those that advocate for commercial interests as a 501c organization are not eligible for accreditation in the ACCME system. They cannot serve in the role of joint provider, but they can be a commercial supporter.)

Commercial Support- financial, or in-kind, contributions given by a commercial interest, which is used to pay all or part of the costs of an activity.

Commercial Exhibits and Advertisements – are promotional activities, which must be kept separate from the educational activity. Monies paid by commercial interests to providers for these types of promotional opportunities are not considered to be “commercial support” of a CME activity. The ACCME expects accredited providers to fulfill the requirements of the [Standards for Commercial Support \(SCS\) Standard 4](#), outlined below, and to use sound fiscal and business practices with respect to this type of income.

Guidelines for Soliciting Commercial Support

1. SDH and/or the joint provider must make all decisions regarding the disbursement of commercial support (SCS Standard 3.1). All commercial support associated with a CME activity must be given with the full knowledge and approval of the SDH CME Dept. (SCS Standard 3.3).
2. SDH and/or the joint provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services. (SCS Standard 3.2)
3. If the commercial interest requires an application for consideration of commercial support, SDH and the joint provider should have full knowledge and approval of requested applications, pending applications, and final authorization.

Written Agreement Requirement for Documenting Terms of Commercial Support

1. The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter that includes the SDH and the joint provider. The same rule applies if the support is given directly to the joint provider. (SCS Standard 3.4)
 - The written agreement, in form of a Letter of Agreement (LOA), must specify the commercial interest that is the source of commercial support. (SCS Standard 3.5)
 - Both the commercial supporter and the provider must sign the LOA between the commercial supporter, the provider, and the joint provider. (SCS Standard 3.6)
2. The LOA must contain the following information:
 - The name of the commercial interest, the joint provider, and the accredited provider
 - The title, dates, and location of the educational activity
 - The amount of funds to be given by the commercial interest
 - The terms, conditions, and purposes of the commercial support
4. The SDH CME Dept. has a standard LOA template that we prefer to utilize, however, the commercial interest will often request that their LOA is used. This is acceptable as long as the agreement contains all of the elements listed in our standard template. In this scenario, the SDH CME Dept. will review LOA prior to signing to ensure all elements are included. ***Please see attachment titled “Letter of Agreement template”***
5. All Commercial Support LOAs must be executed and signed by all parties prior to the conference, at least 3 weeks prior to the event. Funds received within a week of the activity which do not have a corresponding LOA will be refused and returned; in addition, the commercial interest funds will not be disclosed.

Guidelines for the Use of Commercial Support

1. The provider and/or the joint provider, must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with SDH’s written policies and procedures. A commercial interest cannot pay for any portion of the educational activity directly. (SCS Standard 3.8) ***Please see attachment titled, “Process for Honoraria and Reimbursement of Expenses for Planners, Teachers, and/or Authors.”***
2. No other payment shall be given to the director of the activity, planning committee members, teachers or authors, joint provider, or any others involved with the supported activity.(SCS Standard 3.9)
3. If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be reimbursed and honoraria can be paid for their teacher or author role only. (SCS Standard 3.10)
4. Commercial support cannot be used to pay for travel, lodging, or personal expenses of non-faculty participants of a CME activity with the exception of bona fide employees and volunteers of the provider or joint provider. (SCS Standard 3.12)
5. Social events or meals at CME activities cannot compete with or take precedence over the educational events.(SCS Standard 3.11)
6. The joint provider must produce accurate documentation detailing the receipt and expenditure of the commercial support. (SCS Standard 3.13) ***Please see attachment titled “Financial Tracking Sheet”***
7. A commercial interest may require evidence that the funds were used in compliance with the LOA and may request that any unused funds be returned. If applicable, these terms will be outlined in the LOA.

Guidelines for the Acknowledgement of Commercial Support

1. The source of all commercial support must be disclosed to the learner prior to the beginning of the activity. (SCS Standards 6.3 & 6.5)
2. Disclosure must never include the use of a corporate logo, trade name or a product-group message of an ACCME-defined commercial interest. (SCS Standard 6.4)
3. If “in-kind” support is given, the nature of the support must also be disclosed to the learner. (SCS Standard 6.3)
In-kind commercial support, in the context of the ACCME’s Standards for Commercial Support, includes non-monetary resources provided by a commercial interest in support of a CME activity. Examples of in-kind support include equipment, supplies, and facilities.

Guidelines for Exhibits and Commercial Promotion

The SDH CME Dept. requires that all exhibitors agree to the terms in conditions outlined in the Invitation to Exhibit or other formal confirmation letter, which details the standards below:

1. Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CME activities. (SCS Standard 4.1)
2. Exhibits and advertising at an event must be kept separate from the educational activity. Product-promotion material or product-specific advertisement of any type is prohibited in or during CME activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided.(SCS Standard 4.2)
 - For print, advertisements and promotional materials will not be interleaved within the pages of the CME content.
 - For live, face-to-face CME, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CME activity. Providers cannot allow representatives of Commercial Interests to engage in sales or promotional activities while in the space or place of the CME activity.
3. Educational materials that are part of the educational activity (such as slides, abstracts, and handouts) cannot contain any advertising, corporate logo, trade name, or product-group message of an ACCME Defined Commercial Support. (SCS Standard 4.3)
4. Print or electronic information distributed about the non-CME elements of a CME activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement. (SCS Standard 4.4)
5. A provider cannot use a commercial interest as the agent providing a CME activity to learners, e.g., distribution of self-study CME activities or arranging for electronic access to CME activities. (SCS Standard 4.5)
6. Commercial support and exhibit or advertising fees must be collected and accounted for separately in order to ensure that the management of each type of income is being handled appropriately (SCS Standard 3.13).
7. The joint provider must produce accurate documentation detailing the amount of exhibit money received, as this is a reporting requirement in ACCME’s Program and Activity Reporting System (PARS). ***Please see attachment titled “Financial Tracking Sheet”***
8. Fees for exhibit space or advertisement should be consistent and based on the product or service that a commercial interest is receiving.