**Accreditation Program**

**Surveyor Report Form**

**All Criteria, Policies & Standards for Integrity and Independence**

**for 2023 Cohorts**

This form is to be completed by the Surveyors and submitted to the CCMEA Decision-Making Committee.

**Provider Information**

Provider Name: Click or tap here to enter text.

Provider ID Number: Click or tap here to enter text.

**Current Accreditation Status**

Accredited by the MMA through: Committee on Continuing Medical Education and Accreditation

Current Term of Accreditation:  2 Years  4 Years  6 Years

**Survey Information**

Date of Report: Click or tap to enter a date.

Surveyor: Click or tap here to enter text.

Surveyor: Click or tap here to enter text.

Reporter Name: Click or tap here to enter text.

**Accreditation Recommendation**

Term of Accreditation:  Accreditation with Commendation  Accreditation

Provisional Accreditation  Probation  Non-Accreditation

**Is a Progress Report required?** *(Progress Reports are required for any Noncompliance finding for the Core Accreditation Criteria and Standards for Integrity and Independence. Progress reports are optional for a Noncompliance finding for a Policy.)*

***Yes***  ***No***

**Details of Progress Report:**

Click or tap here to enter text.

1. **CME Mission and Program Improvement**

**MISSION (Formerly Criterion 1)**

The provider has a CME mission statement that includes expected results articulated in terms of changes in competence, performance, or patient outcomes that will be the result of the program.

* Does the provider's mission statement include expected results articulated in terms of changes in competence, performance, or patient outcomes?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Mission criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**PROGRAM ANALYSIS (Formerly Criterion 12)**

The provider gathers data or information and conducts a program-based analysis on the degree to which the CME mission of the provider has been met through the conduct of CME activities/educational interventions.

* Did the provider gather data or information and conduct a program-based analysis on the degree to which its CME mission has been met through the conduct of CME activities/educational interventions?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Program Analysis criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**PROGRAM IMPROVEMENTS (Formerly Criterion 13)**

The provider identifies, plans, and implements the needed or desired changes in the overall program (e.g., planners, teachers, infrastructure, methods, resources, facilities, interventions) that are required to improve on ability to meet the CME mission.

* Did the provider identify, plan, and implement needed or desired changes in the overall program that are required to improve on its ability to meet the CME mission?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Program Improvements criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

1. **Educational Planning and Evaluation**

**EDUCATIONAL NEEDS (Formerly Criterion 2)**

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

* Does the provider’s process(es) identify the professional gaps and the underlying educational needs of its learners?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Educational Needs criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**DESIGNED TO CHANGE (Formerly Criterion 3)**

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

* Does the provider design its activities to change competence, performance, or patient outcomes as described in its mission statement?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Designed to Change criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**APPROPRIATE FORMATS (Formerly Criterion 5)**

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

* Does the provider choose formats that are appropriate to the setting, objectives, and desired results of its activities?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Appropriate Formats criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**COMPETENCIES (Formerly Criterion 6)**

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

* Does the provider develop their activities in the context of desirable physician attributes?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Competencies criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**ANALYZES CHANGE (Formerly Criterion 11)**

The provider analyzes changes in learners’ (competence, performance, or patient outcomes) achieved as a result of the overall program's activities/educational interventions.

* Does the provider analyze changes achieved in learners’ competence, performance, or in patient outcomes based on data and information from its program’s activities/educational interventions?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Analyzes Change criterion.

Click or tap here to enter text.

* If you indicated yes above, explain how the criterion was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

1. **Standards for Integrity and Independence in Accredited Continuing Education**

**STANDARD 1: ENSURE CONTENT IS VALID**

**(Formerly CME Clinical Content Validation Policies and Criterion 10 SCS 5.2)**

Accredited providers are responsible for ensuring that their education is fair and balanced and that any

clinical content presented supports safe, effective patient care.

1. 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.

1. 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.

1. 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.

1. Organizations cannot be accredited if they advocate for unscientific approaches to diagnosis or

therapy, or if their 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.

* Does the provider:

1. ensure all recommendations for patient care in accredited continuing education is based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options;
2. ensure all scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation conforms to the generally accepted standards of experimental design, data collection, analysis, and interpretation;
3. facilitate engagement with new and evolving topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning; and,
4. ensure that the provider does not advocate for unscientific approaches to diagnosis or therapy, and their education does not 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?

***Yes***  ***No***

* Describe additional materials that were requested regarding Standard 1.

Click or tap here to enter text.

* If you indicated yes above, explain how the standard was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**STANDARD 2: PREVENT COMMERCIAL BIAS AND MARKETING IN ACCREDITED CONTINUING EDUCATION (Formerly Criterion 7 [SCS 1] and Criterion 10 [SCS 5.1])**

Accredited continuing education must protect learners from commercial bias and marketing.

1. The accredited provider must ensure that all decisions related to the planning, faculty selection,

delivery, and evaluation of accredited education are made without any influence or involvement from

the owners and employees of an ineligible company.

1. Accredited education must be free of marketing or sales of products or services. Faculty must not

actively promote or sell products or services that serve their professional or financial interests during

accredited education.

1. The accredited provider must not share the names or contact information of learners with

any ineligible company or its agents without the explicit consent of the individual learner.

* *Element 1:* Does the provider ensure that all decisions related to the planning, faculty selection, delivery, and evaluation of accredited education are made without any influence or involvement from the owners and employees of an ineligible company?

***Yes***  ***No***

* *Element 2:* Does the provider ensure that its education is free of marketing or sales of products or services?

***Yes***  ***No***

* *Element 3:* If the provider shares the names or contact information of learners with ineligible companies or their agents, does it ensure the explicit consent of individual learners?

***Yes***  ***No***  ***N/A***

* Describe additional materials that were requested regarding Standard 2.

Click or tap here to enter text.

* If you indicated yes above to Element 1, Element 2, and Element 3, explain how the standard was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above to Element 1, Element 2, or Element 3, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**STANDARD 3: IDENTIFY, MITIGATE, AND DISCLOSE RELEVENT FINANCIAL RELATIONSHIPS**

**(Formerly Criterion 7 [SCS 1, 2 &6])**

Accredited providers must take the following steps when developing accredited continuing education.

1. Collect information: Collect information from all planners, faculty, and others in control of

educational content about all their financial relationships with ineligible companies within the prior 24

months. There is no minimum financial threshold; individuals must disclose all financial

relationships, regardless of the amount, with ineligible companies. Individuals must disclose

regardless of their view of the relevance of the relationship to the education.

Disclosure information must include:

a) The name of the ineligible company with which the person has a financial relationship.

b) The nature of the financial relationship. Examples of financial relationships include employee,

researcher, consultant, advisor, speaker, independent contractor (including contracted research),

royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock

options should be disclosed; diversified mutual funds do not need to be disclosed. Research

funding from ineligible companies should be disclosed by the principal or named investigator

even if that individual’s institution receives the research grant and manages the funds.

1. Exclude owners or employees of ineligible companies: Review the information about

financial relationships to identify individuals who are owners or employees of ineligible

companies. These individuals must be excluded from controlling content or participating as

planners or faculty in accredited education. There are three exceptions to this exclusion—

employees of ineligible companies can participate as planners or faculty in these specific

situations:

a) When the content of the activity is not related to the business lines or products of their employer/company.

b) When the content of the accredited activity is limited to basic science research, such as preclinical research and drug discovery, or the methodologies of research, and they do not make

care recommendations.

c) When they are participating as technicians to teach the safe and proper use of medical devices,

and do not recommend whether or when a device is used.

1. Identify relevant financial relationships: Review the information about financial relationships to

determine which relationships are relevant. Financial relationships are relevant if the educational

content an individual can control is related to the business lines or products of the ineligible company.

1. Mitigate relevant financial relationships: Take steps to prevent all those with relevant financial

relationships from inserting commercial bias into content.

a. Mitigate relationships prior to the individuals assuming their roles. Take steps appropriate to the

role of the individual. For example, steps for planners will likely be different than for faculty and

would occur before planning begins.

b. Document the steps taken to mitigate relevant financial relationships.

1. Disclose all relevant financial relationships to learners: Disclosure to learners must include each

of the following:

a) The names of the individuals with relevant financial relationships.

b) The names of the ineligible companies with which they have relationships.

c) The nature of the relationships.

d) A statement that all relevant financial relationships have been mitigated.

Identify ineligible companies by their name only. Disclosure to learners must not include ineligible

companies’ corporate or product logos, trade names, or product group messages.

Disclose absence of relevant financial relationships. Inform learners about planners, faculty, and

others in control of content (either individually or as a group) with no relevant financial relationships

with ineligible companies.

Learners must receive disclosure information, in a format that can be verified at the time of

accreditation, before engaging with the accredited education.

* **Identification:** Did the provider collect information from all planners, faculty, and all others in control of educational content regarding all relevant financial relationships with ineligible companies for activities occurring prior to January 1, 2022?

***Yes***  ***No***

* **Identification:** Does the provider have processes in place to collect information from all planners, faculty, and all others in control of educational content regarding all financial relationships with ineligible companies for activities occurring January 1, 2022 and subsequently?

***Yes***  ***No***

* **Identification:** Does the example submitted by the provider demonstrate that it collects information that meets the expectations of Standard 3.1 as of January 1, 2022?

***Yes***  ***No***

* **Identification:** If the provider uses owners or employees of ineligible companies, do they limit its use of them to the three exceptional circumstances permitted by the ACCME as articulated in Standard 3.2 (a-c)?

***Yes***  ***No***  ***N/A***

* **Identification**: Does the provider identify financial relationships as relevant when the educational content controlled by an individual is related to the business lines or products of the ineligible company?

***Yes***  ***No***

* **Mitigation**: Does the provider mitigate all relevant financial relationships appropriate to the role(s) of all planners, faculty, and others in control of educational content?

***Yes***  ***No***

* **Diclosure to Learners:** Does the provider inform learners of the presence or absence of relevant financial relationships for all planners, faculty, and others in control of educational content*?*

***Yes***  ***No***

* **Diclosure to Learners:** Does the provider inform learners that all relevant financial relationships have been mitigated as of January 1, 2022?

***Yes***  ***No***

* **Overall:** Does the provider meet all of the requirements for Standard 3?

***Yes***  ***No***

* Describe additional materials, if any, that were requested regarding Standard 3.

Click or tap here to enter text.

* If you indicated yes to all questions above, explain how the standard was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no to any of the above questions, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials). Please identify the question(s) you are addressing in your comments.

Click or tap here to enter text.

* Does the provider ensure that its organization does NOT engage in joint providerships with ineligible companies?

***Yes***  ***No***

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**STANDARD 4: MANAGE COMMERCIAL SUPPORT APPROPRIATELY**

**(Formerly Criterion 8 (SCS 3))**

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.

a. Ineligible companies must not pay directly for any of the expenses related to the education or the

learners.

b. 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.

c. 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.

d. The accredited provider may use commercial support to defray or eliminate the cost of the

education for all learners.

1. 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.

1. 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.

1. 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.

* Does the provider accept commercial support?

***Yes***  ***No* (If no, continue to Standard 5)**

* If yes, does the provider ensure that it:
  1. makes all decisions regarding the receipt and disbursement of the commercial support;
  2. provides documentation of agreements with ineligible companies and execute all agreements prior to the start of the accredited education;
  3. keeps 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; and,
  4. discloses 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?

***Yes***  ***No***

* Describe additional materials that were requested regarding Standard 4.

Click or tap here to enter text.

* If you indicated yes above, explain how the standard was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

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**STANDARD 5: MANAGE ANCILLARY ACTIVITIES OFFERED IN CONJUNCTION WITH ACCREDITED CONTINUING EDUCATION (Formerly Criterion 9 (SCS 4)**

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:

a. Influence any decisions related to the planning, delivery, and evaluation of the education.

b. Interfere with the presentation of the education.

c. Be a condition of the provision of financial or in-kind support from ineligible companies for the

education.

1. The accredited provider must ensure that learners can easily distinguish between accredited education and other activities.

a. 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.

b. 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.

c. 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.

d. 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.

1. Ineligible companies may not provide access to, or distribute, accredited education to learners.

* Does the provider ensure that:
  1. it does not allow ineligible companies to influence any decisions related to the planning, delivery, and evaluation of the education, interfere with the presentation of the education, or agree to conditions where marketing or exhibits are a provision of financial or in-kind support from ineligible companies for the education;
  2. learners can easily distinguish between accredited education and other activities; and,
  3. ineligible companies may not provide access to, or distribute, accredited education to learners?

***Yes***  ***No***  ***N/A* (Continue to Accreditation Statement)**

* Describe additional materials that were requested regarding Standard 5.

Click or tap here to enter text.

* If you indicated yes above, explain how the standard was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

1. **Accreditation Statement**

**Accreditation Statement Policy**

The accreditation statement must appear on all CME activity materials and brochures distributed by accredited organizations, except that the accreditation statement does not need to be included on initial, save-the-date type activity announcements. Such announcements contain only general, preliminary information about the activity such as the date, location, and title. If more specific information is included, such as faculty and objectives, the accreditation statement must be included.

The ACCME accreditation statement is as follows:

For directly provided activities: “The (name of accredited provider) is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.”

For jointly provided activities: “This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of (name of accredited provider) and (name of nonaccredited provider). The (name of accredited provider) is accredited by the ACCME to provide continuing medical education for physicians.”

There is no "co-providership" accreditation statement. If two or more accredited providers are working in collaboration on a CME activity, one provider must take responsibility for the compliance of that activity. Co-provided CME activities should use the directly provided activity statement, naming the one accredited provider that is responsible for the activity. The ACCME has no policy regarding specific ways in which providers may acknowledge the involvement of other ACCME-accredited providers in their CME activities.

* Does the provider ensure that its CME activities meet the requirements of the Accreditation Statement Policy?

***Yes***  ***No***

* Describe additional materials that were requested regarding the Accreditation Statement Policy.

Click or tap here to enter text.

* If you indicated yes above, explain how the policy was met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

1. **CME Activity and Attendance Records Retention Policy**

1. Attendance Records: An accredited provider must have mechanisms in place to record and, when authorized by the participating physician, verify participation for six years from the date of the CME activity. The accredited provider is free to choose whatever registration method works best for their organization and learners. The ACCME does not require sign-in sheets.

2. Activity Documentation: An accredited provider is required to retain activity files/records of CME activity planning and presentation during the current accreditation term or for the last twelve months, whichever is longer.

* Does the provider describe and demonstrate, that it has a mechanism in place to record and, when authorized, verify participation of participating physicians for six years after the date of the activity?

***Yes***  ***No***

* Does the provider describe and demonstrate, that activity files/records of CME activity planning and presentation are retained during the current accreditation term or for the last twelve months, whichever is longer?

***Yes***  ***No***

* Describe additional materials that were requested regarding the CME Activity and Attendance Records Retention Policy..

Click or tap here to enter text.

* If you indicated yes above, explain how the policies were met (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.

* If you indicated no above, explain why (including data from the Self-Study Report, PIPs, Interview, and/or Follow-Up Materials).

Click or tap here to enter text.