



I. Introduction

- A.** Demographic Information Sheet (form to complete can be found in “Documents and Forms Library” on www.scmanet.org)
- B.** Summary of CME Activities (form to complete can be found in “SCMA Home” CME Education page” on www.scmanet.org)
- C.** CME Activity List (a list of your activities for the current term of accreditation (form to complete can be found on the “SCMA Home” “CME Education” page at www.scmanet.org.)
- D.** Self Study Report Prologue
 1. Provide a brief history of your CME Program
 2. Describe the leadership and structure of your CME Program.
- E.** If your organization plans RSS activities, describe your system to monitor RSS for compliance with the SCMA’s requirements. In the description you must (1) include the sampling and monitoring methods that your organization used and (2) identify the accreditation requirements monitored (e.g. SCMA Updated Accreditation Criteria). *Please see Tab 4 – Appendix A for “SCMA’s Expectations of RSS Monitoring Systems.”*


Note: Throughout the self study, you will be required to attach summaries of your actual monitoring data related to specific criteria.
- F.** Describe your organization’s change process for incorporating the SCMA’s Updated Accreditation Criteria. 

II. Essential Area 1: Purpose and Mission (Criterion 1)





- A.** Attach your CME mission statement to verify it has all the required components. Identify and highlight each required component: (1) purpose, (2) content areas, (3) target audience, (4) types of activities, and (5) expected results of the program. 

Note: It is important that SCMA can identify in the expected results section of your mission statement the changes that are the expected results of your CME program (i.e., changes in competence, or performance, or patient outcomes). (C1)









III. Essential Area 2: Educational Planning (Criteria 2-3)

- A.** Describe how you translate identified professional practice gaps into educational needs. Be sure to use the following as an outline of your descriptions:
1. *The gap that you start with* (for professional practice gaps that are identified in methods other than direct measurement of your own learners -- e.g. national trend data, state level data -- explain how you connect these gaps to your own learners),
 2. *The need(s) that you identify based on that gap, and*
 3. *How the need is articulated in terms of knowledge, competence, or performance.* (C2) 











For providers that produce Regularly Scheduled Series (RSS), include in your description how gaps are translated into needs in RSS and attach here a summary of your monitoring data related to Criterion 2.

- B.** Using **two examples**, show where you have incorporated these needs (of knowledge, competence, or performance) into activities or a set of activities. (C2)  
- C.** Show that you have generated CME activities (including RSS, if applicable) designed to change competence, performance, or patient outcomes, as described in your CME mission statement. (C3)  

IV. Essential Area 2: Educational Planning (Criteria 4-6) and SCMA Policies



- A.** Show how your organization, at the CME program or activity planning level, matches the content of your activities to your learners' current or potential scope of practice. Include two examples in your verification. (C4)  
- For providers that produce RSS, include in your description how the content of your RSS is matched to your learners' current or potential scope of practice. Attach here a summary of your monitoring data related to Criterion 4.
- B.** Show the different educational formats (i.e., activity type and methodology) you have utilized for your activities. Explain the rationale or criteria you used in the selection of formats to ensure a format is appropriate for the setting, objectives, and desired results of an activity. Include two examples in your verification. (C5)  
- For providers that produce RSS, include in your description what educational formats you use for RSS. Also describe how you ensure in your planning process for RSS that the format is appropriate for the setting, objectives, and desired results of the RSS. Attach here a summary of your monitoring data related to Criterion 5.
- C.** Show that you have developed CME activities in the context of desirable physician attributes (e.g., IOM competencies, ABMS competencies, specialty specific competencies), including RSS, if applicable. Include two examples in your verification. (C6)  
- For providers that produce RSS, also attach here a summary of your monitoring data related to Criterion 6.
- D.** Show the mechanism your organization uses to **verify physician participation** in your CME activities, including RSS, if applicable.  

V. Essential Area 2: Educational Planning (Criterion 7: ACCME's Standards for Commercial Support - Independence)









- A.** Describe how your organization makes the following decisions free of the control of a commercial interest: (a) identification of needs; (b) the determination of educational objectives; (c) the selection and presentation of content; (d) the selection of all persons and organizations in a position to control the content; (e) the selection of educational methods, and (f) the evaluation of the activity. (SCS 1.1) 
- B.** If your organization enters into joint sponsorship relationships with non-accredited providers, **show** that these organizations are not commercial interests. Provide a list of joint sponsors and a brief descriptor of their organization type. (SCS 1.2)  
- C.** Show the mechanism(s) your organization uses to ensure that everyone in a position to control educational content has disclosed to your organization relevant financial relationships with commercial interests. Include in your description your organization's mechanism(s) for disqualifying individuals who refuse to disclose. (SCS 2.1, 2.2)  
- D.** Describe the mechanism(s) your organization uses to identify conflicts of interest prior to an activity. (SCS 2.3) 
- E.** Describe the mechanism(s) your organization uses to resolve conflicts of interest prior to an activity. (SCS 2.3) 
- F.** Show your organization's process(es) and mechanism(s) for disclosure to the learners of (1) relevant financial relationships of all persons in a position to control educational content and (2) the source of support from commercial interests, if applicable. In your verification, provide two examples of disclosure to the learners of relevant financial relationships and two examples of disclosure to the learners of the source of support from commercial interests, if applicable. (SCS 6.1-6.5)  
- G.** **Attach** an example of the mechanism(s) your organization uses to collect relevant financial relationship information of everyone in a position to control educational content. (SCS 2.1) 
- H.** For providers that produce RSS, include here your monitoring data and analysis regarding your compliance with SCS 1, 2, and 6.

VI. Essential Area 2: Educational Planning (Criterion 8: ACCME’s Standards for Commercial Support – Management of Funds)

ALL ORGANIZATIONS must respond to items A-C, regardless whether or not your organization accepts commercial support.





- A.** Attach your written policies and procedures governing honoraria and reimbursement of expenses for planners, teachers, and/or authors. (SCS 3.7-3.8) 
- B.** Describe what you do to ensure that teachers or authors are reimbursed and paid honoraria only for their teacher or author role. (SCS 3.7.-3.8, 3.10) 
- C.** For providers that produce RSS, include here your monitoring data and analysis regarding your compliance with SCS 3.7, 3.8, and 3.10.

NOTE: If your organization accepts commercial support, respond to D-H, if not go to Section VII.

- D.** Describe your process(es) for the receipt and disbursement of commercial support (both funds and in-kind support). Include in your description how you ensure that advice or services related to teachers, authors, participants, or other educational matters, including content, are not conditions of the commercial support (funds or in-kind commercial support). (SCS 3.1-3.3) 
- E.** Show that all commercial support is given with your organization’s full knowledge and approval. Include in your response your policies and processes to ensure that no other payment is given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved in the activity. Include two examples in your verification. (SCS 3.3; 3.9)  
- F.** Show that commercial support is not used to pay for expenses for non-teacher or non-author participants. Include two examples in your verification. (SCS 3.12)  
- G.** Show that social events do not compete with or take precedence over educational activities. (SCS 3.11)  
- H.** Attach a specimen (completed or blank) of a written agreement documenting terms, conditions, and purposes of commercial support used to fulfill relevant elements of SCS Standard 3. (SCS 3.4-3.6) 
- I.** For providers that produce RSS, include here your monitoring data and analysis regarding your compliance with SCS 3.1-3.4, 3.6, 3.9, 3.11, and 3.12.

VII. Essential Area 2: Educational Planning (Criteria 9-10: ACCME’s Standards for Commercial Support – Separation of Education from Promotion; Promotion of Improvements in Healthcare)

NOTE: ALL ORGANIZATIONS must respond to this section.














- A. Do you organize any **commercial exhibits** in association with any of your CME activities? If yes, describe how your organization ensures that arrangement for commercial exhibits do not (1) influence planning or interfere with the presentation and (2) are not a condition of the provision of commercial support for CME activities. (SCS 4.1) 
- B. Do you arrange for **advertisements** in association with any of your CME activities? If yes, describe how your organization ensures that advertisements or other product-promotion materials are kept separate from the education. In your description, distinguish between your processes related to advertisements and/or product promotion in each of the following types of CME activities: (1) print materials, (2) computer-based materials, (3) audio and video recordings, and (4) face-to-face. (SCS 4.2, 4.4) 
- C. Describe the process or procedure your organization uses to ensure that educational material which are part of a CME activity, such as slides, abstracts and handouts, do not contain any advertising, trade names or product group messages. (SCS 4.3) 
- D. Besides the provision of commercial support, what role do commercial interests play in providing access to CME activities for learners? (SCS 4.5) 

For providers that produce RSS, include here your monitoring data and analysis regarding your compliance with SCS 4.
- E. Describe the planning and monitoring your organization uses to ensure that:
 1. the content of CME activities does not promote the proprietary interests of any commercial interests. (SCS 5.1)
 2. CME activities gave a balanced view of therapeutic options. (SCS 5.2)
 3. the content of CME activities is in compliance with **SCMA’s content validity value statements**.¹. (Policy of Content Validation)



¹ SCMA’s Policy on Content Validation: All the recommendations involving clinical medicine in a CME activity must be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients. All scientific research referred to, reported or used in CME in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection and analysis. Providers are not eligible for SCMA accreditation or reaccreditation if they present activities that promote recommendations, treatment or manners of practicing medicine that are not within the definition of CME, or known to have risks or dangers that outweigh the benefits or known to be ineffective in the treatment of patients.

VIII. Essential Area 3: Engagement with the Environment (Criteria 16-22)


NOTE: The information gathered through your organization's responses here will be used to determine eligibility for Accreditation with Commendation.

- A. If your organization integrates CME into the process for improving professional practice, show how this integration occurs. Examples should be explicit organizational practices that have been implemented or planned. (C16)  
- B. If your organization utilizes non-educational strategies to enhance change as an adjunct to its educational activities, show the strategies that your organization has used as adjuncts to CME activities and how these strategies were designed to enhance change. Include in your description an explanation of how the non-educational strategies were connected to either an individual activity or group of activities. (C17)  
- C. If your organization identifies factors outside of its control that will have an impact on patient outcomes, show instances of this practice. These instances might be specific to the planning of a CME activity or at the overall CME program level. (C18)  
- D. If your organization implements educational strategies to remove, overcome, or address barriers to physician change, show instances of this practice. These instances might be specific to the planning of a CME activity or at the overall CME program level. (C19) 
- E. If your organization is engaged in collaborative or cooperative relations with other stakeholders, show instances of these practices. These instances might be specific to the planning of a CME activity or at the overall CME program level. (C20)  
- F. If your CME unit participates within an institutional or system framework for quality improvement, show this framework. For example, your organization's framework may link the CME committee with a quality or performance improvement committee. (C21)  
- G. If your organization has positioned itself to influence the scope and content of activities/educational interventions, show organizational procedures and practices that support this. (C22)  


IX. Essential Area 3: Evaluation and Improvement (Criteria 11-15)

- A. Show a summary report of the evaluation data and information that your organization has collected about the changes in physician learners' competence, performance and/or patient outcomes. (C11)  


If your organization produces RSS, include in this report your organization's monitoring data and analysis regarding changes in physician learners' competence, performance, or patient outcomes. (C11) RSS


- B. What were the conclusions you drew from your analysis of these data? (C11) 

NOTE: The SCMA expects each provider to conduct a program-based analysis on the degree to which its CME mission has been met. In Section II of this Self Study Report, you attached your organization's CME mission statement. That mission statement is required to have five components (purpose, content areas, target audience, types of activities, and expected results). Your learner change data and the conclusions you reached about those data will help you determine the degree to which the expected results of your CME mission have been met. The following items are designed to illicit information on *what other information* you reviewed to help you determine if your CME mission was met and *your conclusions* regarding your success at meeting your mission.

- C. *In addition to learner change data*, show the SCMA the data and information you gathered as a part of your overall program evaluation. 

For providers that produce RSS, be sure to include RSS in this discussion. (C12) RSS




- D. Based on your review of the data and information as described in your responses to questions A-C, what were your conclusions regarding **your organization's success at meeting its CME mission**? Be sure to include in your description the degree to which your organization
1. reached its target audience;
 2. provided CME on the content areas outlined in the mission;
 3. produced the types of activities stated in the mission; and
 4. fulfilled its purpose. (C12) 

- E. In Section VIII (Engagement with the Environment), you may have described various initiatives your organization has implemented in support of Criteria 16-22. How have you evaluated these and other related initiatives related to Criteria 16-22 to assess the degree to which they helped your organization meet its CME mission (C12)? 

If your organization has not engaged in a practice as described in one of Criteria 16-22, you may have evaluated the extent to which not engaging in a practice impacted your organization's ability to meet its mission. You can respond from that perspective, if applicable.

IX. Essential Area 3: Evaluation and Improvement (Criteria 11-15) CONTINUED

Based on what you described in Section VIII (Engagement with the Environment): 

1. Did the manner and degree to which your organization integrated CME into the process for improving professional practice (C16) help your organization meet its CME mission? If so, how? If not, why?
 2. Did the manner and degree to which your organization utilized non-educational strategies to enhance change as an adjunct to your activities/educational interventions (e.g., reminders, patient feedback) (C17) help your organization meet its CME mission? If so, how? If not, why?
 3. Did the manner and degree to which your organization identified factors outside of your control that impact on patient outcomes (C18) help your organization meet its CME mission? If so, how? If not, why?
 4. Did the manner and degree to which your organization implemented educational strategies to remove, overcome, or address barriers to physician change (C19) help your organization meet its CME mission? If so, how? If not, why?
 5. Did the manner and degree to which your organization built bridges with other stakeholders through collaboration and cooperation (C20) help your organization meet its CME mission? If so, how? If not, why?
 6. Did the manner and degree to which your organization participated within an institution or system framework for quality improvement (C21) help your organization meet its CME mission? If so, how? If not, why?
 7. Did the manner and degree to which your organization has been positioned to influence the scope and content of activities/educational interventions (C22) help your organization meet its CME mission? If so, how? If not, why?
- F.** As a result of your program-based analysis, what changes did you identify that could help you better meet your CME mission? In your response, explain how each change, if implemented, could impact a component of your CME mission (purpose, content areas, target audience, type of activities, or expected results). For providers that produce RSS, include areas for improvement as identified through RSS monitoring in this discussion. (C13) 
- G.** Based on the changes you identified that could be made, describe the changes to your program that you **implemented**. For providers that produce RSS, include the improvements you have implemented in your RSS. For any potential changes (as described in question F above) that you did not implement, please explain why they were not implemented and plans to address them in the future. (C14) 
- H.** Describe how your organization measured, or will measure, the impact of the improvements that you have described in G. 
- I.** If the data are available, include information on whether or not the changes made to your program have fulfilled the intended purpose. Include evidence (e.g. data) to support those conclusions. (C15) 