

# CMIE Application and Coordinator Guide

April 2021

# Agenda

- New Standards
- Planning Process
- Disclosures and “Mitigating Financial Interests”
- New Forms
- Application – Changes and Updates
- Creating Sessions
- Running Reports

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- Q/A



# New Standards

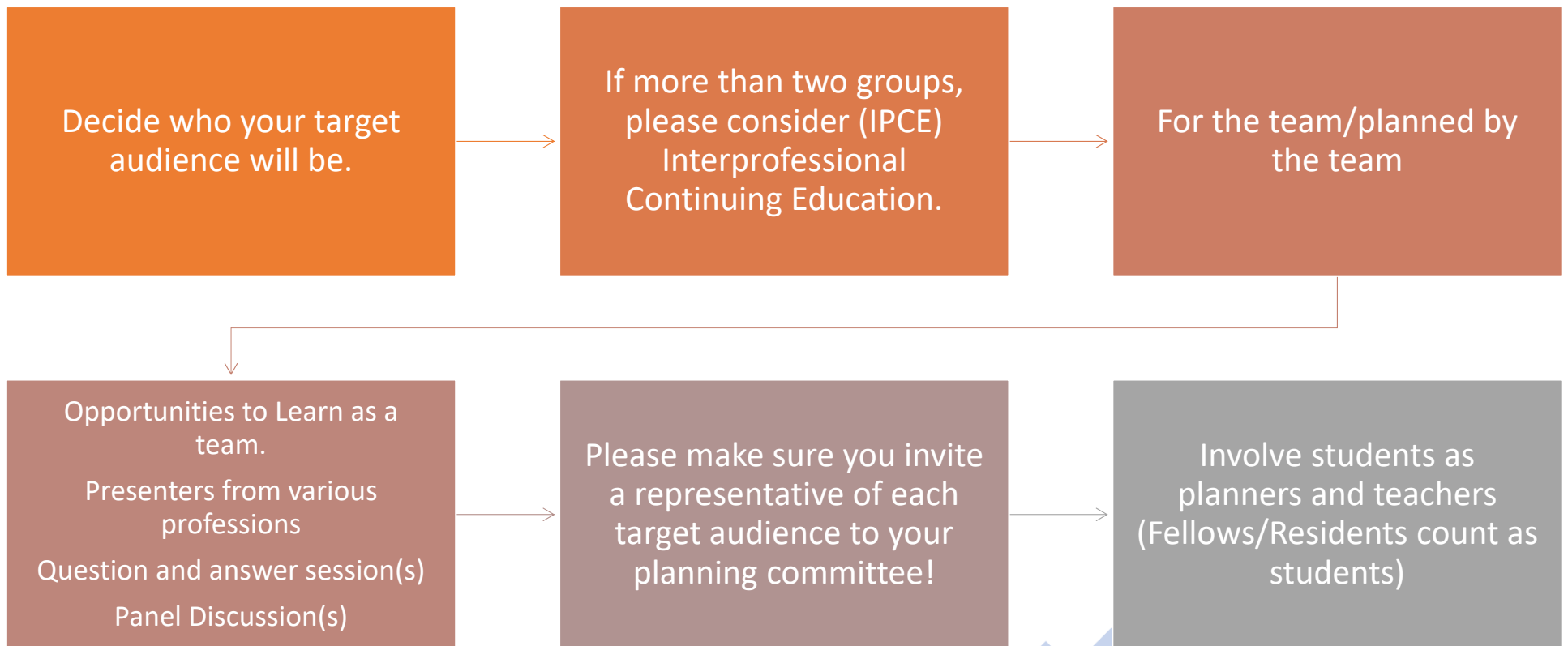
No longer Commercial Support Standards – Now **Standards for Integrity and Independence**

No longer Conflicts of Interest (COI) – Now we use **Financial Relationships with Ineligible Companies**

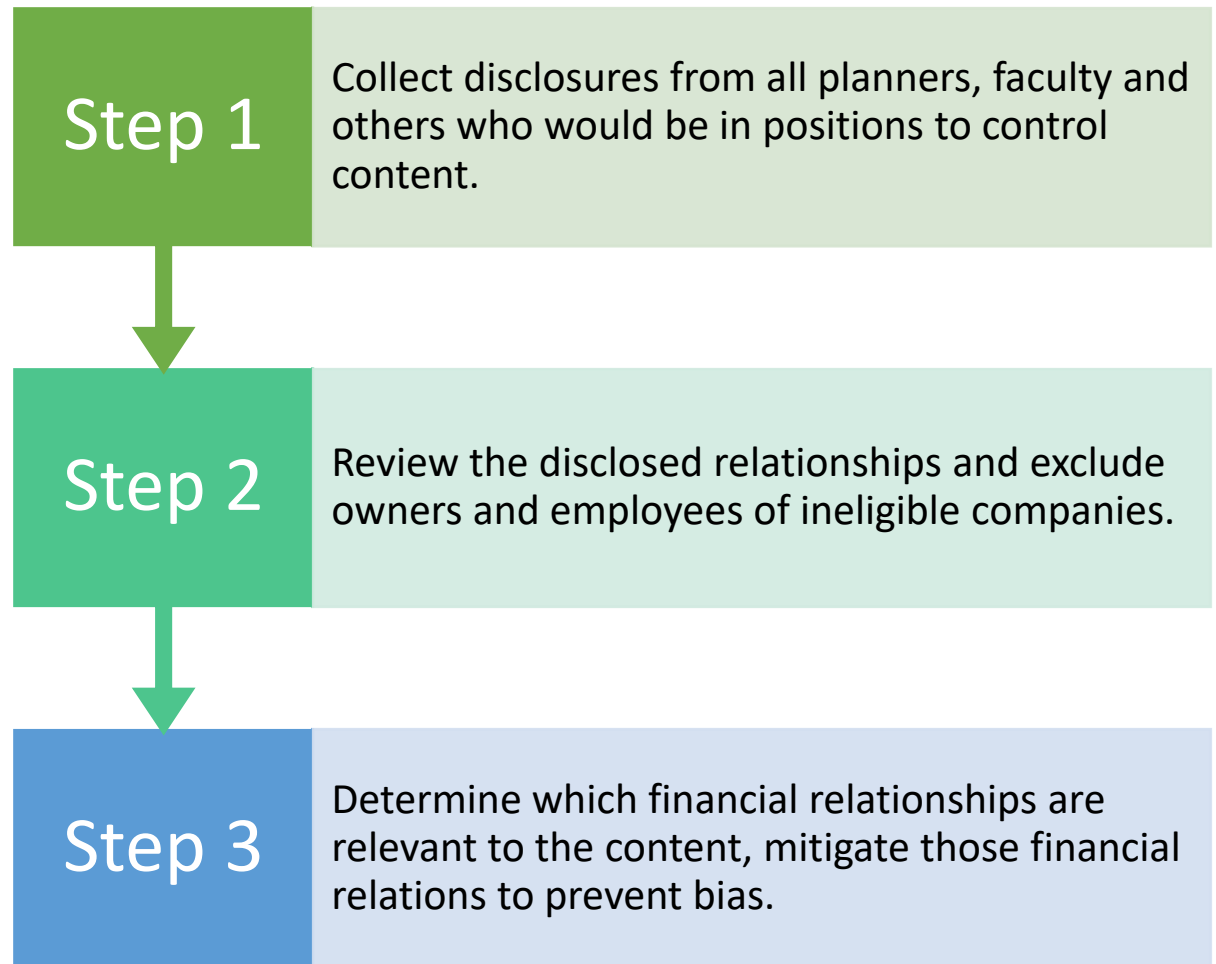
No longer Resolve – Now we use **Mitigate**

No longer Commercial Interests – Now **Financial Relationships with Eligible or Ineligible Companies**

# Where to begin!



# Planning an Activity



# Disclosures and Mitigating

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This now only needs to be done once every **24 months!**

No longer need to list spouse/partner financial interests!

But do need to list ALL financial interests regardless of relevance.

- The course director/planners will review/mitigate.

# How to gather disclosures:

<https://www.highmarksce.com/uvmmed/>  
or  
[med.uvm.edu/cme/](https://med.uvm.edu/cme/)

MY CREDITS CONFERENCES UVM ONLINE CMIE REGULARLY SCHEDULED SERIES APPLICATIONS

The University of Vermont  
LARNER COLLEGE OF MEDICINE

Dashboard Mary Gagné Sign Off

You have successfully signed into the system.  
Use the "Sign Off" option to log out before leaving the site.

## My Credits

Use this section to manage your credits. You can claim credit, edit your evaluations, and print your transcript or certificate.

Dashboard Mary Gagné Sign Off

### Dashboard

Profile	Credits	Important Actions
→ My Profile	→ My Credits	Conference Disclosure Attestation Form
→ Update Password	→ UVM Online CMIE	My Applications
→ Bio/Photo	My External Certificates	
→ Orders		

Either Duplicate  
or Create a New  
Application:

## My Applications

Use the options below to submit or review an application for credit at the University of Vermont.

### Application Submissions

Incomplete applications can be continued by clicking their title. You will be unable to edit an application once it is finalized.

If you have any questions, contact [mary.gagne@med.uvm.edu](mailto:mary.gagne@med.uvm.edu) or call 802/656-2275.

Create Conference

Create Enduring Material

Create Regularly Scheduled Series (RSS)

#### 1. 847 - Women in Medicine Conference - Philadelphia FY 2020

Activity: 2019 Women in Medicine Conference

Application Type: Conference

Submission Status: Completed

[View/Print](#) | [Duplicate](#)

#### 2. 796 - 2019 Hospital Medicine Conference

Activity: 2019 Hospital Medicine Conference

Application Type: Conference

Submission Status: Completed

[View/Print](#) | [Duplicate](#)





Where to enter  
your course  
director,  
planner and  
speakers:

1270 - New Standards

Incomplete

1. Title 2. Leadership 3. Activity Development 4. Supporting Documentation 5. Preview 6. Finalize

### \*Leadership

Use the fields below to identify people who will be involved in this activity's planning and administration.

- Contact Person - The person responsible who could answer logistical questions about the program and any outstanding paperwork.
- Course Director - The person who assumes responsibility for the program content.
- Submitter - The person completing the application.
- Planning Committee Member - Please list all planning committee members.

One or more forms required to be completed by the persons selected are missing.

### Main Contact

1. [Mary Gagné](#)

[Edit/Reorder](#) | [Remove](#)

[Financial Disclosure](#) (Completed)

### Course Director(s)

1. [Mary Gagné](#)


[Edit/Reorder](#) | [Remove](#)

[Financial Disclosure](#) (Completed)

### Planning Committee Member(s)

1. [Karen M. Whitcomb](#), n/a

[Edit/Reorder](#) | [Remove](#)

[Financial Disclosure](#) (Update/Confirmation Required) 

[Contact Now](#)

Click on the words  
"Financial Disclosure"  
to see specifics

Add Course Director

# Once you click on “Financial Disclosure”:

## Financial Disclosure

### Ineligible Companies:

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 sellers

### Exceptions:

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 pre-clinical 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.

To view the Standards for Integrity and Independence Guidelines:

[Standards for Integrity and Independence in Accredited Continuing Education](#)

\* - indicates a required item.

\* **Do you have any financial relationships with ineligible companies (see list above) within the prior 24 months? There is no minimum financial threshold; you must disclose all financial relationships education.**

Yes  No

### Confirmation


I confirm that the above financial disclosure is correct and up to date.

Last Confirmed On: 03/09/2021 12:12 PM


Please make sure the date last confirmed hasn't expired or is close to expiring.

# How to Determine Relevant Financial Relationships

A financial relationship, in any amount, exists between the person in control of the content and an ineligible company.



The financial relationship existed during the past 24 months.



The content of the education is related to the products of an ineligible company with whom the person has a financial relationship.

# What are Eligible Companies

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

# What are Ineligible Companies

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 sellers

# Exceptions that Allow for Owners and/or Employees of Ineligible Companies to Participate

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

When the content of the accredited activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.

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.

# What if there is a financial relationship?

\* Do you have any financial relationships with ineligible companies (see list above) within the prior 24 months? There is no minimum financial threshold; you must disclose all financial relationships regardless of the amount. You must disclose to the education.

Yes  No



## Current/Applicable Relationships

	* COMPANY NAME	* RELATIONSHIP	RELATIONSHIP ENTERED/START	RELATIONSHIP STATUS/END
*1.	Biogen	stock holder (<\$5,000)	02-12-2021	Will End On: <input type="text"/>
2.	Vertex	stock holder (<\$5,000)	02-12-2021	Will End On: <input type="text"/>
3.	Medtronic	stock holder (<\$5,000)	02-12-2021	Will End On: <input type="text"/>
4.	Merrimack Pharmaceuticals	stock holder (<\$5,000)	04-10-2020	Will End On: 02-12-2021



## Confirmation

I confirm that the above financial disclosure is correct and up to date.

Last Confirmed On: 02/12/2021 11:55 AM

## How to mitigate a disclosure:

Complete the Disclosure Mitigation Form if any financial relationships were indicated in the disclosure form.

- If the disclosed relationship is not relevant to the presentation, check that box/sign the form and upload with your application.
- The disclosed relationship is relevant to the presentation, but it is with an Eligible Company, check that box/sign the form and upload with your application.
- If the relationship has ended, no need to complete the form.



## How to mitigate a disclosure:

If the disclosed relationship is relevant and with an Ineligible Company:

- Course director or planner will need to review the presentation to make sure there is no bias.
  - If there is, the presentation will need to be modified.
- Presentation will be limited to discussion of data and research.
- **Speaker/Moderator will be replaced.**
- **Proceed with the speaker without credit.**
- If it is a planner: The course director/planner who have no financial interests, will have to sign off that there was no bias within the planning process and/or planner was removed from any relevant topics.

All relevant financial relationships must be relayed to the learners prior to the start of the activity

- For regularly scheduled series (grand rounds, tumor boards) use the Monitoring Form/Slide
- For conferences use the Conference Disclosure Form



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Relationships do not have to be listed if:

- They are not relevant
- Have already ended



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Speakers cannot sell books!

- They can in an exhibit hall separate from the education where the learner has a “choice” to attend.

# ALL Forms have been updated:

Planning Committee Summary Form

Monitoring Form for RSS's

Conference Disclosure Form

Disclosure Mitigation Form (formerly called Conflict of Interest Resolution Form – COI)

Support from Ineligible Companies Agreement (formerly called Commercial Support Form)

# Forms – Where are they located?

[med.uvm.edu/cme](http://med.uvm.edu/cme)

## Continuing Medical and Interprofessional Education

COLLEGE OF MEDICINE Home Conferences Speakers Grand Rounds Online CMIE Credits Exhibitors Contact

Upcoming Conferences  
Vermont Geriatrics Conference  
April 1, 2021  
Recognizing & Responding to Child Maltreatment - Promoting Child Abuse Awareness in VT Conference  
April 29, 2021  
Integrative Pain Management Conference  
May 7, 2021

UVM CMIE

Conferences ▾  
Schedule  
Get Updates  
Plan an Activity

Grand Rounds ▾  
About Grand Rounds  
Plan an Activity

## Quick Links

- [My Credits](#)
- [Conferences](#)
- [Contact Us](#)

Forms

## Create New Application

Use the tabs below to submit your application. Required items are noted in **red text** and must be completed before submitting your application. You may click on any of the other tabs after completing the title tab.

Please be sure to click Save before moving on to (or clicking) the next tab. Any unsaved data will be lost.

Please do not use the browser's back button to navigate to the previous tab.

1270 - New Standards

Incomplete



### \* Supporting Documentation

Use the form below to upload documents. To upload a document, select the classification below, then click the add document button, and use the uploader to upload your document.

Sample documentation:

- Checklist for completing the application
- Planning Committee Meeting Summary Form
- Sample Disclosure Page (Conference)
- Sample Monitoring Form (RSS - UVM)
- Sample Monitoring Form (RSS - Non-UVM)
- Monitoring Form Disclosure Slide
- Disclosure Mitigation Form
- Support for Ineligible Companies Agreement

The following documents are required based on the current application information:

- Gap Documentation
- Monitoring Form
- Planning Committee Meeting Summary Form

\* Document Classification:

# New section in the application:

## \*Activity Development

Use this section to submit additional information related to this activity. Click on the links below to submit the additional information

10 of 10 required items completed

### \* Additional Information - RSS

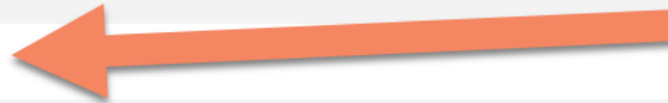
Completed | [View/Print](#) | Updated By: *mary.gagne@uvm.edu* @ 3:13 PM on 3/19/21

### \* Agenda

Completed | [View/Print](#) | Updated By: *mary.gagne@uvm.edu* @ 3:14 PM on 3/19/21

### \* New - Budget and Financial Relationships

Completed | [View/Print](#) | Updated By: *mcgagne* @ 3:38 PM on 3/19/21





If you are receiving any support grants/in-kind:

If you are accepting any support or in-kind donations (equipment) please list all in your application.

If you accept support from Ineligible Companies, please have them complete and sign The Support for Ineligible Companies Agreement form.

Any questions  
about the  
application  
process?



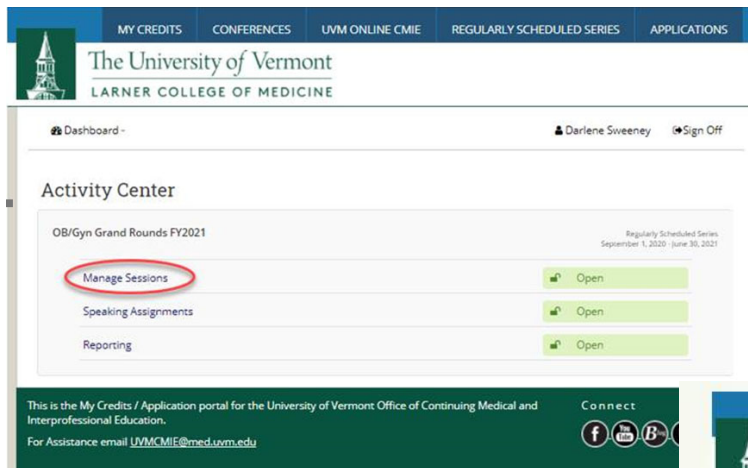
Once your  
RSS  
Application  
is Approved

The screenshot shows the user interface of the LARNER COLLEGE OF MEDICINE dashboard. At the top, there is a navigation bar with links for MY CREDITS, CONFERENCES, UVM ONLINE CMIE, REGULARLY SCHEDULED SERIES, and APPLICATIONS. Below this is the university logo and name. The main content area is titled "Dashboard" and contains several panels:

- Profile:** Includes links for My Profile, Update Password, Bio/Photo, and Orders.
- Credits:** Includes links for My Credits, UVM Online CMIE, My External Certificates, and My Department Staff Transcripts.
- Important Actions:** Includes a link for My Applications.
- Forms:** Includes a link for Financial Disclosure.
- Speaker / Coordinator Center:** Includes links for OB/Gyn Grand Rounds FY2021, Gynecology Ultrasound Conference FY2021, Obstetrical Ultrasound Perinatal Diagnosis FY2021, and Activity Title.
- Applications:** Includes a link for My Applications.

Two red annotations are present: one pointing to the "Dashboard" link in the top navigation bar with the text "Coordinator logs in and navigates to Dashboard", and another pointing to the "Gynecology Ultrasound Conference FY2021" link in the Speaker / Coordinator Center panel with the text "Select Activity Here".

# Creating a Session – MANAGE SESSIONS



MY CREDITS CONFERENCES UVM ONLINE CMIE REGULARLY SCHEDULED SERIES APPLICATIONS

The University of Vermont  
LARNER COLLEGE OF MEDICINE

Dashboard - Darlene Sweeney Sign Off

Activity Center




OB/Gyn Grand Rounds FY2021 Regularly Scheduled Series  
September 1, 2020 - June 30, 2021

Manage Sessions Open

Speaking Assignments Open

Reporting Open

This is the My Credits / Application portal for the University of Vermont Office of Continuing Medical and Interprofessional Education.  
For Assistance email [LIVCMIE@med.uvm.edu](mailto:LIVCMIE@med.uvm.edu)

Connect   

Click on Manage Sessions to create/edit a session.



MY CREDITS CONFERENCES UVM ONLINE CMIE REGULARLY SCHEDULED SERIES APPLICATIONS

The University of Vermont  
LARNER COLLEGE OF MEDICINE

Dashboard - Darlene Sweeney Sign Off

My Sessions To Build for OB/Gyn Grand Rounds FY2021

Use the options below to build out your session shells

Create Session from Pre-Approved Template

Back to Activity Center

Click Create Session from Pre-Approved Template to add a new session.

Dashboard -

### Edit Ob/Gyn Grand Rounds FY2021 Instructions

Use the option below to set the date, time and location of the course.

\* - indicates a required item.

\*Title:

Code:  Remainder

\* Starts On:

\* Ends On:

Location:

Room:

Credits: 1

Description:

Add Session title to the existing activity title

- Keep the activity title so it can be searched for

Update the code number

- Add 01 for your first session, 02 for your second...

Update start/end date

Click on the drop-down arrow to select location/room

- If it is not listed, let us know so we can add it

Optional

Description of session

Objectives map over from the application, but you can update

**Remember to CLICK  
SAVE**

Once the session has been created from the template

- You can preview your session
- Add your speaker (Manage Roles)
  - If they are new to the system, you will need to send them directions to complete their disclosure
  - Check financial disclosures to see if anything needs to be mitigated
- You can edit a session (edit session)
- You can cancel the session (cancel)
- Make your topic searchable (manage categories)
- Get the QR Code (reporting)

21-117-17 - Ob/Gyn Grand Rounds FY2021\_Patient and Family Centered Care

January 26, 2021  
7:30 AM - 8:30 AM

[Preview](#) · [Edit Session](#) · [Manage Roles](#) · [Manage Categories](#) · [Reporting](#) · [Cancel](#)



## Make your sessions SEARCHABLE

- Click on Manage Categories
- Select any credit type (Hospice, Palliative Care and Pain Management is always on demand)
- Add departments/topics (we can always add if something is missing)

## Reports Menu for Ob/Gyn Grand Rounds FY2021\_Patient and Family Centered Care

Activity Reports for OB/Gyn Grand Rounds FY2021

### Session Reports

Status Report



### RSS Coordinator

Darlene Sweeney - Ob/Gyn Grand Rounds FY2021\_Patient and Family Centered Care

### Speaker

Maria Avila - Ob/Gyn Grand Rounds FY2021\_Patient and Family Centered Care

Gina Carrera - Ob/Gyn Grand Rounds FY2021\_Patient and Family Centered Care

### CEU/CME Reports

Get QR Code

Credit Report



## Reports

### Status Report

- See if your speaker has completed their disclosure

Create a QR Code  
for your learners

Credit Report to see  
who claimed credit



# Activity Center REPORTING – This will give you overall reports for your series

MY CREDITS   CONFERENCES   UVM ONLINE CMIE   REGULARLY SCHEDULED SERIES   APPLICATIONS

The University of Vermont  
LARNER COLLEGE OF MEDICINE

Dashboard   Darlene Sweeney   Sign Off

### Activity Center

OB/GYN Grand Rounds FY2021 Regularly Scheduled Series  
September 4, 2019 - June 30, 2021

<a href="#">Reporting</a> <small>Closes: Fri, 12/25, 2020</small>	<a href="#">Open</a>
<a href="#">Manage Sessions</a> <small>Closes: Fri, 1/8, 2021</small>	<a href="#">Open</a>
<a href="#">Speaking Assignments</a> <small>Closes: Fri, 1/8, 2021</small>	<a href="#">Open</a>

George Till  
Marjorie Meyer  
Elise Everett  
Gillian Stearns

#### Activity Coordinator

Darlene Sweeney  
George Till

#### Planning Committee Member

Marjorie Meyer  
Elise Everett  
Sandra Sperry  
Samantha Deans

#### Registrant Reports

Responses for the Form - Financial Disclosure

#### CE Credit Reports

Overall Evaluation Responses - 2019 Gap Assessment Survey  
Overall Evaluation Response Summary - 2019 Gap Assessment Survey  
Activity Awarded Credit Summary

Click here to view  
Financial Disclosures  
reports for all Sessions.

Click here to see the Gap  
assessment survey results.

The Activity Awarded Credit Summary  
will show you a list of attendees for  
your sessions as well as their emails.

My External Certificates

My Applications

My Activity Center

My Required Forms

My Department Staff

Sign Off

Any questions  
about the  
activity  
center?

