ACCME Standards for Integrity and Independence in Accredited Education
Transition Checklist

AAFP encourages CME providers to review the ACCME Standards, and associated resources, to begin working on a transition plan to achieve compliance with the new Standards by January 1, 2022. Here is a checklist to help get started.

Standard 1: Ensure Content is Valid

☐ Review your process for ensuring that education is fair and balanced, and supports safe, effective patient care.
☐ Review your process for communicating your expectations to planners, authors, and faculty.

Standard 2: Prevent Commercial Bias and Marketing in Accredited Continuing Education

☐ Communicate to faculty that they cannot actively promote or sell products or services during accredited education.
☐ If you intend to share learners’ names or contact information with an ineligible company, determine how you will obtain the explicit consent of individual learners.
  ☐ If you ask for consent at registration, the learner must have the ability to opt out and still register for your activity.
  ☐ The consent statement must be clearly visible—not hidden in a long list of terms and conditions.

Standard 3: Prevent Commercial Bias and Marketing in Accredited Continuing Education

☐ Change your processes as needed to make sure that you collect information from all planners, faculty, AAFP members (for Prescribed credit), and others in control of educational content about:
  ☐ all their financial relationships with ineligible companies
  ☐ within the 24 months prior to their involvement with an accredited CME activity
☐ Use the correct and complete definition of an ineligible company, i.e. those whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients.
☐ If you choose to collect the information periodically, rather than for each activity, ask individuals to update their disclosure information if anything changes to ensure you have up-to-date, accurate information.
☐ Determine how you will review and manage the disclosure information to ensure that you:
  ☐ Exclude owners or employees of ineligible companies, unless they meet the exceptions to the exclusion.
  ☐ Identify relevant financial relationships.
  ☐ Mitigate relevant financial relationships, as appropriate to the person’s role.
☐ Ensure that disclosure to learners includes all four elements of Standard 5.3:
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.

☐ Determine how you will save the materials you used to communicate disclosure to learners for verification during the audit process.

**Standard 4: Manage Commercial Support Appropriately**

While there is nothing new in the requirements for managing commercial support, we suggest that, if applicable, you review your processes to ensure that:

☐ You make all decisions regarding the receipt and disbursement of the commercial support.
☐ The terms are documented in an agreement (e.g. LOA) prior to the start of the education.
☐ You keep a record of the commercial support amount and how it was used.
☐ You disclose to learners the names of the companies providing the support and the nature of the support if it was in-kind.
☐ Disclosure to learners does not include the ineligible companies’ corporate or product logos, trade names, or product group messages.

**Standard 5: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education**

If applicable to your organization, review your processes to ensure that learners can easily distinguish between accredited education and other activities, including marketing by ineligible companies and non-accredited activities.

☐ Live activities (in person or virtual):
  o If this Standard applies to any of your activities, you will want to consider a standard process for distinguishing CME from non-CME.
  o Clearly label non-accredited CME sessions/activities.

☐ Print, online, or digital activities: Make sure the learners can engage with the education without being presented with product promotion or advertisement.

☐ Educational materials in accredited activities: Make sure these are free of marketing by ineligible companies.