UCSF Continuing Education Portal

CloudCME

Live Activity Setup VII – Part 2: Commercial Support

This guide will cover the following topics. Click a title below to jump to a specific section.

Contents

Standard 4 of the Standards for Integrity and Independence in Accredited Continuing Education

The Standards for Integrity and Independence in Accredited Continuing Education are designed to:

- Ensure that accredited continuing education serves the needs of patients and the public
- Present learners with only accurate, balanced, scientifically justified recommendations
- Assure learners they can trust accredited continuing education to help them deliver, safe, effective, cost-effective, and compassionate care that is based on best practice and evidence
- Create a clear, unbridgeable separation between accredited continuing education and marketing and sales.

Standard 4 applies only to accredited continuing education that receives financial or in-kind support from ineligible companies.

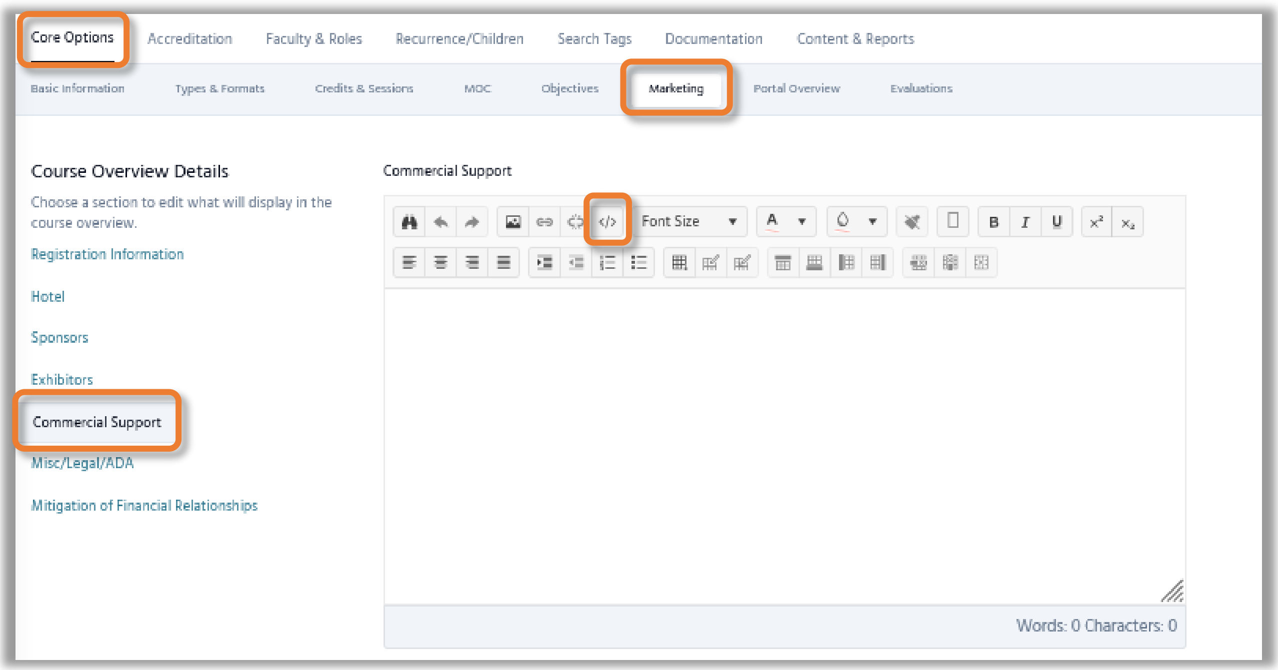
Accredited providers that choose to accept ***commercial support*** (defined as financial or in-kind support from ineligible companies) are responsible for ensuring that the education remains independent of the ineligible company and that the support does not result in commercial bias or commercial influence 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.

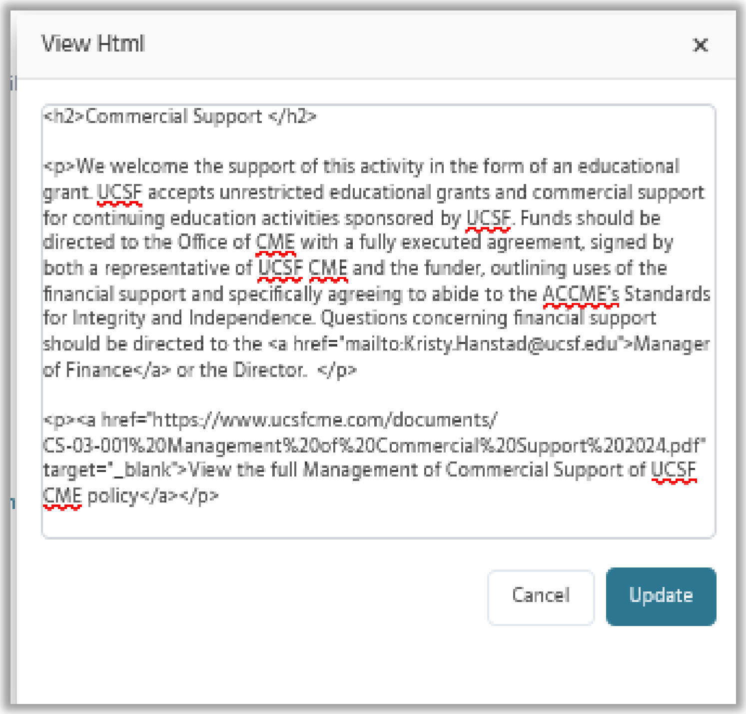
For more information: https://accme.org/rule/manage-commercial-support-appropriately/

Step 1. Publishing your Request for Commercial Support

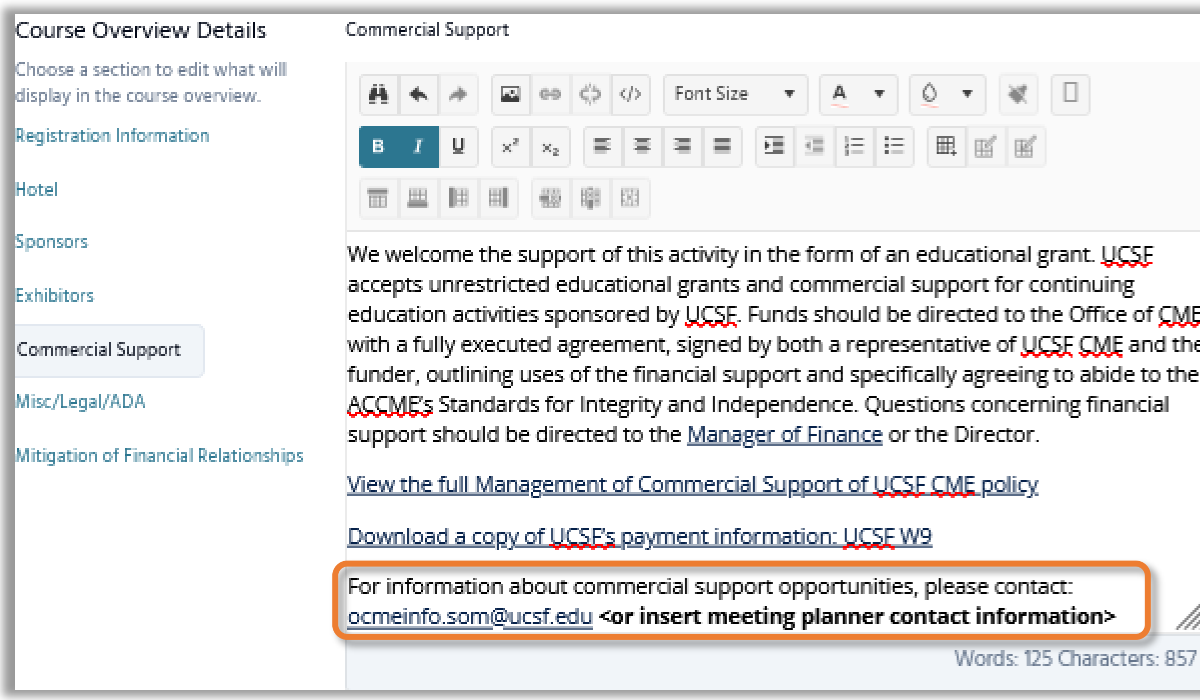
You can add a Commercial Support tab to your Course Details page by adding informational language in the **Activity Editor**.

1. After opening the Activity Editor for your activity, navigate to Core Options > Marketing, and click the Commercial Support link on the left-hand side under **Course Overview Details**.
2. Start with adding the template language from the **Marketing Templates** site at https://ucsf.cloud-cme.com/course/courseoverview?P=5&EID=15251
3. Copy the text under "HTML CODE:" to your clipboard.
4. In the Commercial Support text box, click the HTML code button </> and paste the code in the dialog box. Click Update.





5. Update the text with details or other information pertinent to your activity, especially the last paragraph concerning contact information.



6. Click 

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Step 2. Share a Tracking Tool with the Office of CME

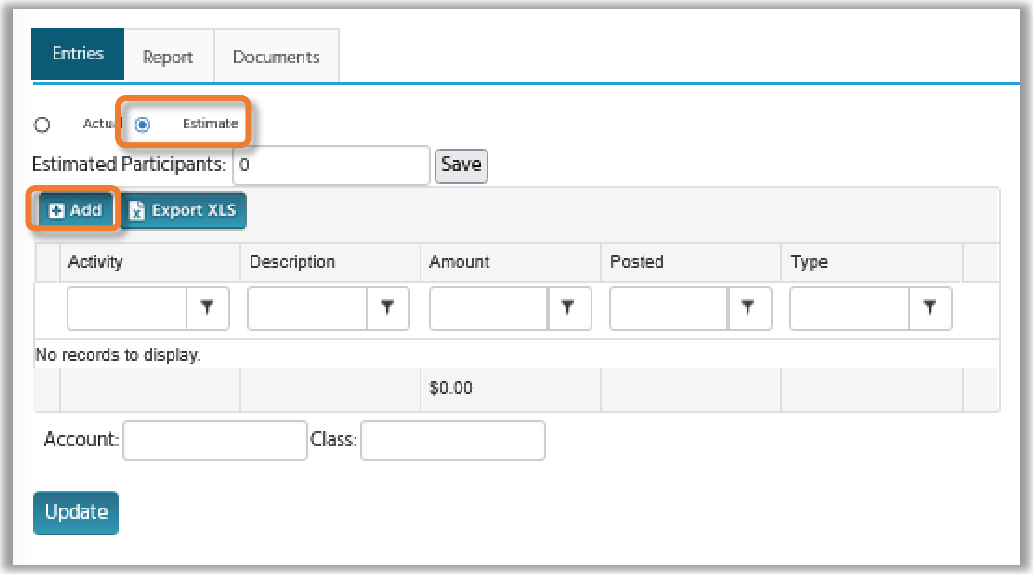
To assist you in tracking solicitations and payments and help the OCME identify payments that belong to your activity, we recommend sharing a tracking sheet listing vendors who have been or will be solicited.

Use this tool to keep track of contacts, pledges, payments and amounts. A template is available from the CE Portal: Commercial Support and Exhibit Tracking (xls).

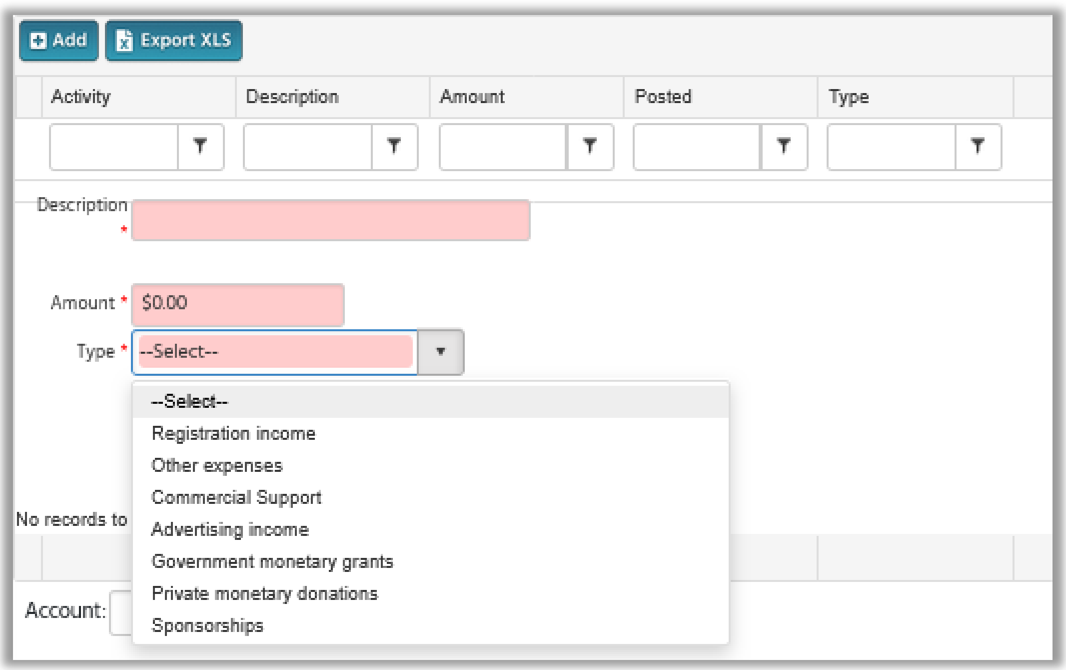
Upload the document to a shared cloud site such as OneDrive or Teams (SharePoint), or UCSF Box, and share with Kristy.Hanstad@ucsf.edu and Christopher.Conway@ucsf.edu.

Step 3. Use the CE Portal Budget Tool for Tracking

1. From the Main Menu, navigate to Finance>Budget, and search for your activity. The **Activity Budget Screen** will appear with three tabs: Entries, Report, Documents.



2. In the Entries tab, select the Estimate radio button. Here you can optionally enter your estimated number of participants.
3. Click the Add button.

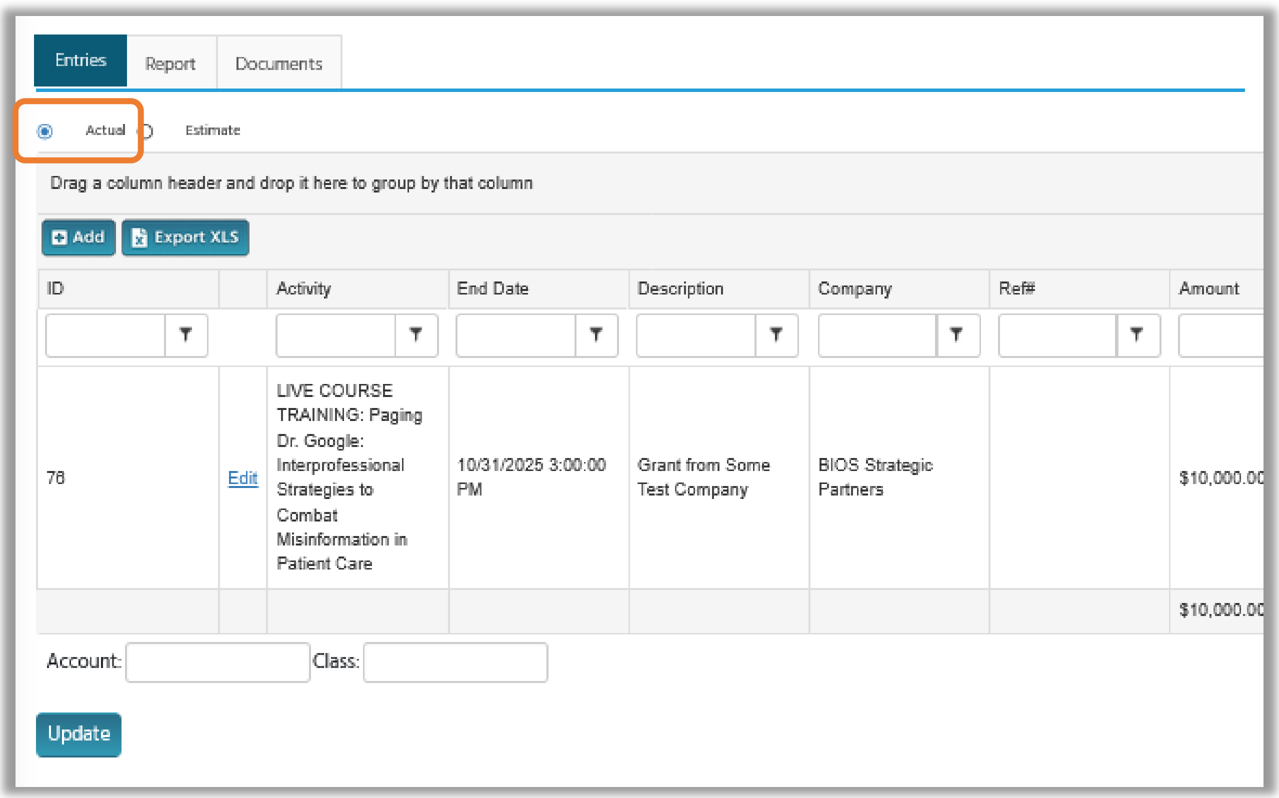


4. Enter the solicited company name as the **Description**.

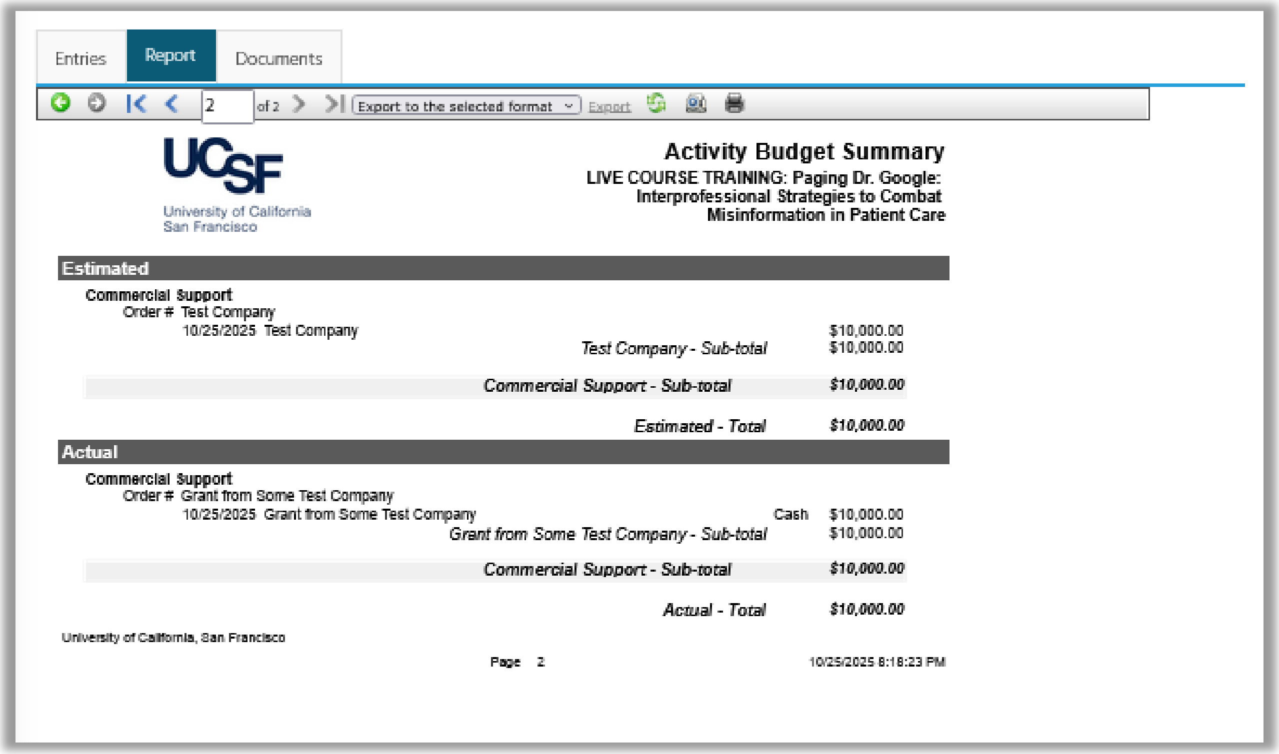
5. Enter the amount asked for (or pledged).
6. For **Type**, select “Commercial Support.”
7. Click Save.

When funds are received and identified, they will be added to the Actual section of the Entries tab. This information will not only appear in revenue reports but also help track who has pledged funds vs. those who’ve paid.

Tracking commercial support/grants in the system automatically adds your supporters to generated documentation within the system, and it also improves OCME’s reporting to the accreditors and our ability to track down and claim your funds as they come into the University.



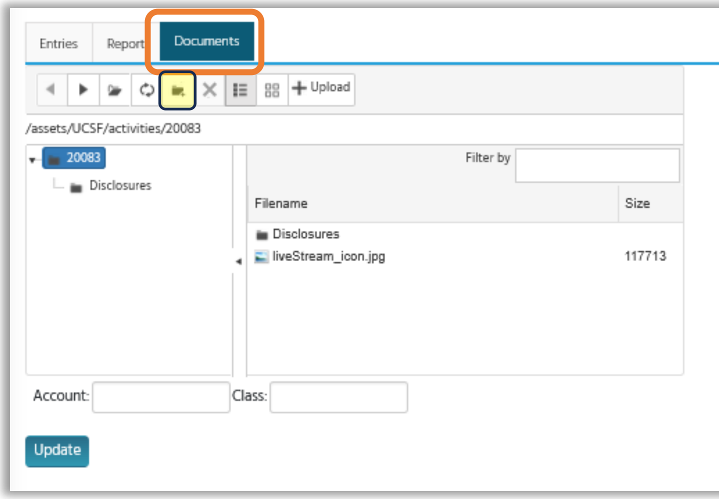
The Report tab provides a summary of transactions.



Step 4. Save Commercial Support Agreements

When a **Commercial Support Agreement** (either OCME's Standard Agreement or the vendor's agreement) is fully executed, it can be uploaded to the activity from this screen.

(See templates for commercial support, exhibit, and in-kind agreements in the [OCME Course Commercial Support Documents folder](#).)



1. Open the Documents tab.
2. If it doesn't already exist, create an "**Agreements**" folder.
    a. Click the New Folder icon.

    b. Enter "**Agreements**" as the new folder name.
    c. Click OK.
3. Double-click the Agreements folder to open it.
4. Using the standard naming convention below rename your agreement document.
    a. **COURSENUMBER_GRANT_COMPANY_$AMT** (for commercial support)
    b. **COURSENUMBER_EXH_COMPANY_$AMT** (for a regular exhibit)
    c. **COURSENUMBER_LAB_COMPANY_$AMT** (for a wet lab)
    d. **COURSENUMBER_PRODUCTTHEATER_COMPANY_$AMT** (for a product theater)
    e. **COURSENUMBER_INKIND_COMPANY_$AMT** (for in-kind/non-monetary support)
    f. *Use multiple identifiers if the agreement covers more than one kind of support, for example:*
        i. ***MOT26001_EXH_PRODUCT THEATER_MERCK_$28k***
        ii. ***Or MOT26001_EXH_LAB_MERCK_$10k***
5. Click the Upload button and select your document to store it.