

Policy Title:	Lead Planner Eligibility for a Dartmouth Health Accredited Continuing Education (ACE) Activity Policy	Policy ID:	Reference #
Keywords	continuing education, CE, CME, continuing medical education, CNE, continuing nursing education, learning activity, relevant financial relationship, disclosure, mitigation, resolution, attestation form, relationship with industry, commercial interest, ineligible company, activity director, nurse planner, accredited, Live Activity, Conference, Course, Symposium, Regularly Scheduled Series, Grand Rounds, Morbidity and Mortality, Case Conferences, Journal Clubs, Enduring Material, online learning activities, Lead Planner, IPCE, JA, Joint Accreditation, Pharmacy, planning committee, ACE, Accredited Continuing Education		

I. Purpose of Policy

The purpose of this policy is to define eligibility for official status as a Lead Planner for a Dartmouth Health Accredited Continuing Education (ACE) Activity. This status is a privilege that ties directly to the awarding of credit/contact hours associated with credentialing and licensure of healthcare professionals. The Lead Planner of a Dartmouth Health ACE Activity is responsible for the educational excellence and fiscal integrity of the activity to protect the interests of Dartmouth Health member organizations and partners (at leadership discretion).

II. Policy Scope

The scope of this policy includes: all Dartmouth Health employees; all individuals with an official, current faculty appointment from the Geisel School of Medicine at Dartmouth; and all employees' and faculty members' administrative staff. The scope of this policy also covers all planning committee members, speakers, authors, and anyone else in a position to control the content of an ACE activity.

III. Definitions

Accredited Continuing Education (ACE) Activity – An ACE Activity is an educational offering (e.g., Live Activity/Conference/Course/Symposium, Regularly Scheduled Series/Grand Rounds/Morbidity and Mortality/Case Conferences/Journal Clubs, Enduring Material/online learning activities) that is planned, implemented, and evaluated in accordance with the Joint Accreditation Criteria associated Dartmouth Health policies and protocols.¹

ACCME Standards for Integrity and Independence in Accredited Continuing Education – The Accreditation Council for Continuing Medical Education (ACCME®) Standards for Integrity and Independence are the rules that ACE providers, including Dartmouth Health, must follow. The Standards 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 healthcare professionals and teams that they can trust accredited continuing education to help them deliver safe, effective, cost-effective, compassionate care that is based on best practice and evidence; and create a clear, unbridgeable separation between accredited continuing education and marketing and sales.

IV. Policy Statement

The determination of eligibility for qualifying as an approved Lead Planner rests with the Medical Director of IPCE/Associate Dean for CME, Vice President for CLPD, Director of ACE, and the interprofessional accreditation system directors.

A qualified Lead Planner must meet the following criteria:

1. Be an employee in good standing of a Dartmouth Health Member Organization or one of Dartmouth Health partners.
2. Has experience/training in providing continuing education.
3. Takes responsibility for the oversight of the financial integrity, provides activity reporting and maintains accountability for adhering to all Dartmouth Health financial policies and procedures related to the activity.
4. Ensures the planning committee is comprised of appropriate representation of the target audience and accreditation type as follows:
 - a. For continuing medical education activities, a Dartmouth Health healthcare provider, researcher, or doctorally prepared professional.
 - b. For continuing nursing education activities, a Dartmouth Health NCEC nurse planner. (See [NCEC Members | Continuing Education for Professionals | DHMC and Clinics \(dartmouth-hitchcock.org.\)](#))
 - c. For pharmacy activities, a designated Dartmouth Health pharmacist.
 - d. As additional accreditation professions are added to Dartmouth Health accreditation types provided, representation of those professions is included as well.

V. References

¹ *Joint Accreditation Criteria* – [Joint Accreditation Criteria | Joint Accreditation.](#)

² *ACCME Standards for Integrity and Independence in Accredited Continuing Education* – [Standards for Integrity and Independence in Accredited Continuing Education | ACCME](#)

Responsible Owner:	Center for Learning and Professional Development	Contact(s): email	clpd.support@hitchcock.org
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Related Polices &	Lead Planner Eligibility for a Dartmouth Health Accredited Continuing Education		

Procedures:	(ACE) Activity Policy, Refusal/Failure to Disclose or Mitigate Relationships for a Dartmouth Health Accredited Continuing Education (ACE) Activity Policy; Policy - Selection of Accredited Provider Program Director or Nurse Planner; Policy - Roles and Responsibilities of Nurse Planners
Related Job Aids:	