THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

SCHOOL OF PHARMACY
DIVISION OF PHARMACY PRACTICE
AND EXPERIENTIAL EDUCATION   T 919.843.4028
CAMPUS BOX 7574
BEARD HALL
CHAPEL HILL, NC 27599-7360

Please submit this completed packet and additional documents by April 29, 2024

Dear First Last ,

Thank you for your willingness to provide a continuing education course on May 13-14, 2024 . This letter will serve as confirmation of your participation as a speaker, and it contains details pertinent to your participation in this activity. This also serves as an agreement with an effective date of April 29, 2024 , set to expire 1 YEAR FROM THE PROGRAM DATE.

To meet ACPE standards and expectations, we ask that you provide the following to the UNC Eshelman School of Pharmacy:

1. This completed/signed speaker packet (including signed Speaker Letter and Disclosure Form, and Active Learning Plan)
2. A current CV
3. An electronic copy of any handout materials and slides that you plan to use, no later than April 29, 2024

These items should be completed and emailed to UNC ESOP REPS at REPS@unc.edu by the date listed at the top of the document. There are several guidance documents also included in this packet to provide additional details and information related to these documents, as well as what can or cannot be included in your presentation per ACPE standards

In accordance with the educational nature of the activity, presenters agree to the following:
- Present objective, unbiased information regarding the topic.
- Use generic product names.
- Provide a balanced view of therapeutic options.
- When an unlabeled use of a product or an unapproved product is discussed, disclose that the product is not labeled for the use under discussion or that the product has not been approved for marketing.

Disclose the existence of any relevant financial relationships within the past 12 months with a commercial interest whose products or services are discussed in the continuing education activity content over which we have control. Whether there is anything to disclose or not, this information will be provided to the audience in your presentation slides (usually the second slide).

Rev. 12.20.19

DISCLOSURE EXAMPLE(S):
Speakers Bureau: XYZ Pharmaceutical/Device Co.
Paid Consultant: XYZ Pharmaceutical/Device Co.
Stock Holder: XYZ Pharmaceutical/Device Co.
Grant/Research Support: XYZ Pharmaceutical/Device Co.

If you have no disclosures/potential conflicts of interest, then please state that in a slide and in your handout. An example of that wording must be inserted stating:

DISCLOSURE EXAMPLE:
I have no relationships with commercial interests related to the content of my presentation.

There is no compensation for speaking at this program. Please call me if you have any questions or need additional information about ACPE compliance. Thank you for your contributions to this program.

Sincerely,

Austin Companion
UNC Eshelman School of Pharmacy
Continuing Education Coordinator
austin.companion@unc.edu
919-843-4028

_____ Accepted

Office of Postgraduate Education - CE Program
Eshelman School of Pharmacy
The University of North Carolina
Campus Box 7574, Beard Hall
Chapel Hill, NC 27599
Telephone: 919.843.4028

Disclosure of Relevant Financial Relationships with Commercial Interests

It is the policy of the Office of Postgraduate Education - CE Program to insure balance, independence, objectivity, and scientific rigor in all its individually or jointly sponsored CE programs. All meeting planners and faculty participating in any University of North Carolina Eshelman School of Pharmacy Office of Postgraduate Education - CE Program are expected to disclose _any_ real or apparent relevant financial relationships that may have a _direct bearing on the subject matter_ of the continuing education program. Disclosure pertains to relationships with _any_ pharmaceutical companies, biomedical device manufacturers, or other corporations whose products or services are related to the subject matter of the program planning and / or presentation topic. This relevant information will be obtained from all program planners and speakers and summarized in the program packet and disclosed in the presentation materials.

The intent of this policy is not to prevent a meeting planner or speaker with potential relevant financial relationship with commercial interest from planning or making a presentation after review and resolution / approval by this ACPE provider. It is intended that any potential relevant financial relationship should be disclosed so that the audience can form their own opinion about any bias in the planning or presentation.

CE Program Name: Research in Education and Practice Symposium
_____

Title of the Presentation: _____

Planner's / Presenter's Name: _____

I have no actual or potential relevant financial relationship with commercial interest in relation to this program.

_____   _____
Signature   Date

I have a relevant financial relationship with commercial interest(s) or affiliation with one or more organizations that could be perceived as a real or apparent relevant financial relationship in the context of the planning or subject of this presentation, including but not limited to: consulting; a family member employed by the organization; a fiduciary responsibility; membership on a governing board; recipient of a grant or research support; a major stockholder; receiving other financial or material support; and/or membership on a speaker's bureau.

Name of Organization   Name of Relationship

_____   _____

_____   _____

_____   _____

_____   _____
Signature   Date

Please return this form as soon as possible to the Office of Postgraduate Education - CE Program at the address shown above.

Active Learning Plan for UNC REPS

SESSION TITLE

May 13-14, 2024

Complete a row for each learning objective you will cover during your presentation. Provide a copy to your host when you submit your slides for review.

Learning Objective	Planned Active Learning Activity	How Active Learning Activity Will Be Assessed
EXAMPLE: Review my research project design and discuss the results.	Question and Answer Session planned following the presentation.	Encourage questions following my presentation and answer as able.

1. This is a **knowledge-based** program. When writing your program objectives, please use the suggested verbs listed on the CPE Activity Guidance document under the Knowledge-Based CPE Activity. Your session should include 1-3 learning objectives that are specific and measurable to what the participant will take away from your session. Objectives should complete the statement "At the end of this program participants will be able to…". Several example objectives are listed on the Active Learning Plan, if needed.

2. Use those written objectives in the Active Learning Plan to then complete that document. The CPE Activity Guidance document also lists several Active Learning techniques that you may use in your presentation and to complete the Active Learning Plan.

3. Be sure to include a disclosure slide toward the beginning of your presentation, usually slide 2.

4. CPE activities are to remain educational events that are fair and free of bias. To help ensure that criteria is met please try to avoid using things like brand names. Also, please be sure to follow copyright laws in your use of images and others' material in your presentation.

Additional Resource:

ACPE Standards: https://www.acpe-accredit.org/continuing-education-provider-accreditation/
        Select Standards/Policies and Procedures tab on the left side of the page

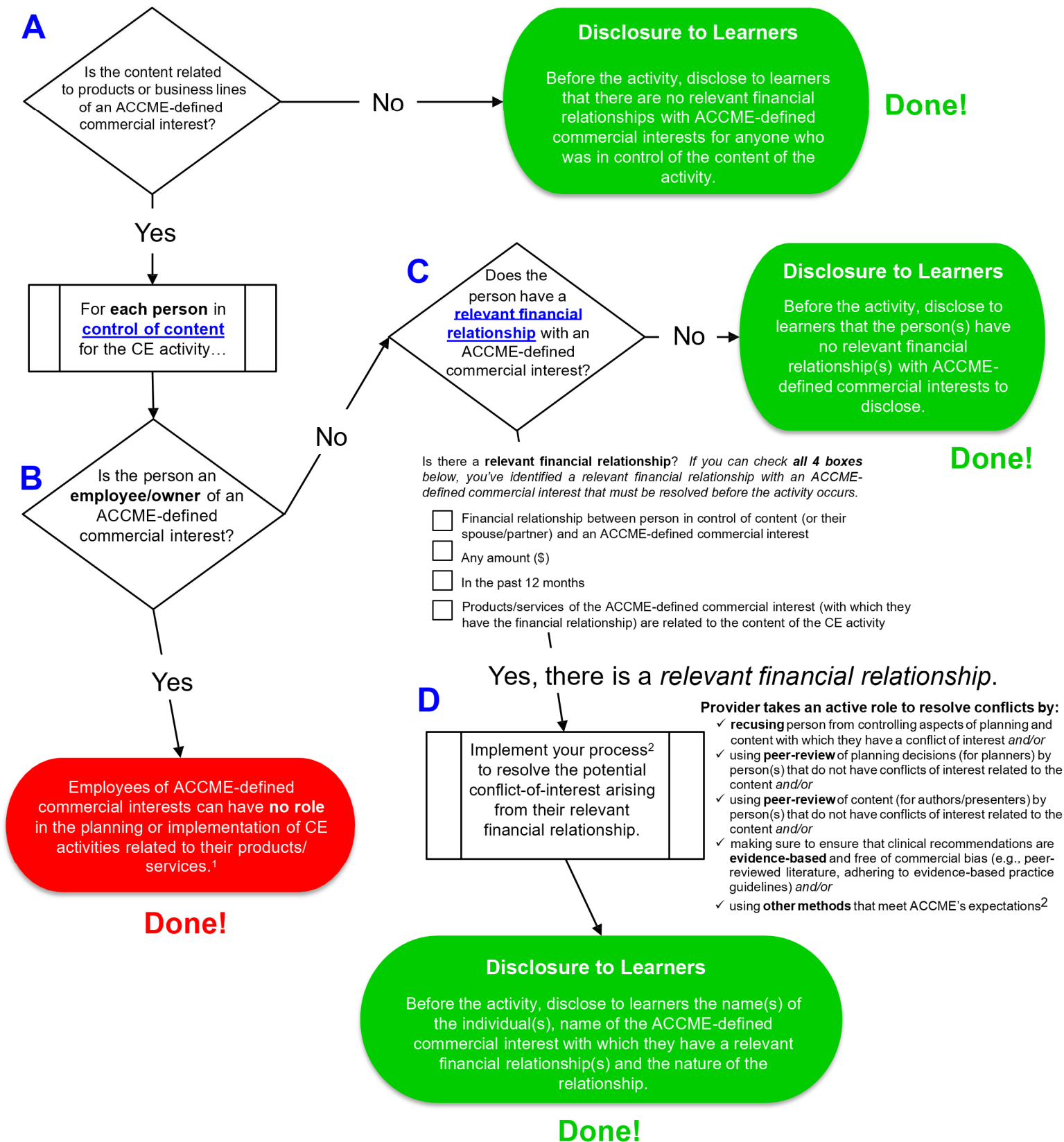Copyright Information: https://www.copyright.gov/circs/

Flowchart for the Identification and Resolution of Personal Conflicts of Interest
(Last updated: February 1, 2017)

Use this flowchart at the beginning of your planning process for CE activities to ensure independence from ACCME-defined commercial interests. **Start at A below.** For step-by-step instructions for using this flowchart, visit **www.accme.org/coiflowchart**.

A — Is the content related to products or business lines of an ACCME-defined commercial interest?

→ **No** →

Disclosure to Learners

Before the activity, disclose to learners that there are no relevant financial relationships with ACCME-defined commercial interests for anyone who was in control of the content of the activity.

Done!

Yes ↓

For **each person** in **control of content** for the CE activity…

↓

B — Is the person an **employee/owner** of an ACCME-defined commercial interest?

→ **No** →

C — Does the person have a **relevant financial relationship** with an ACCME-defined commercial interest?

→ **No** →

Disclosure to Learners

Before the activity, disclose to learners that the person(s) have no relevant financial relationship(s) with ACCME-defined commercial interests to disclose.

Done!

Is there a **relevant financial relationship**? *If you can check **all 4 boxes** below, you've identified a relevant financial relationship with an ACCME-defined commercial interest that must be resolved before the activity occurs.*

- ☐ Financial relationship between person in control of content (or their spouse/partner) and an ACCME-defined commercial interest
- ☐ Any amount ($)
- ☐ In the past 12 months
- ☐ Products/services of the ACCME-defined commercial interest (with which they have the financial relationship) are related to the content of the CE activity

Yes ↓ (from B)

Employees of ACCME-defined commercial interests can have **no role** in the planning or implementation of CE activities related to their products/services.[1]

Done!

Yes, there is a *relevant financial relationship*.

D — Implement your process[2] to resolve the potential conflict-of-interest arising from their relevant financial relationship.

Provider takes an active role to resolve conflicts by:
- ✓ **recusing** person from controlling aspects of planning and content with which they have a conflict of interest *and/or*
- ✓ using **peer-review** of planning decisions (for planners) by person(s) that do not have conflicts of interest related to the content *and/or*
- ✓ using **peer-review** of content (for authors/presenters) by person(s) that do not have conflicts of interest related to the content *and/or*
- ✓ making sure to ensure that clinical recommendations are **evidence-based** and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines) *and/or*
- ✓ using **other methods** that meet ACCME's expectations[2]

↓

Disclosure to Learners

Before the activity, disclose to learners the name(s) of the individual(s), name of the ACCME-defined commercial interest with which they have a relevant financial relationship(s) and the nature of the relationship.
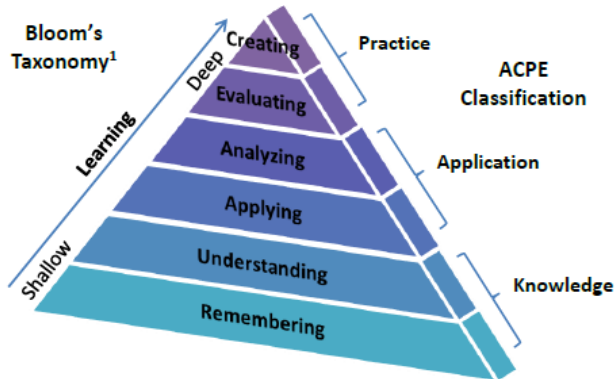
Done!

Footnotes
1. The use of employees of ACCME-defined commercial interests as faculty and planners or in other roles where they are in a position to control the content of accredited CE is prohibited, except in specific situations. For more information, visit this *Ask ACCME* frequently-asked-question regarding commercial employees.
2. There are a range of approaches providers can use to resolve potential conflicts of interests. For more information, visit ACCME's Provider Examples of Compliance and Noncompliance. ACPE-accredited providers can find examples and resources on the ACPE website.

CPE Activity Guidance

ACPE has defined three types of CPE-based activities designated by their expectations of the audience members. Level of expectations for an activity may vary based on the pre-established baseline knowledge of the audience or the amount of time allocated to building the knowledge and skills of the audience members during the CPE activity. This document defines the ACPE-Activities and can assist with identifying appropriate learning expectations through developing activity objectives with appropriate action verbs and potential active learning strategies to assess the effectiveness of the audience's ability to meet an objective.
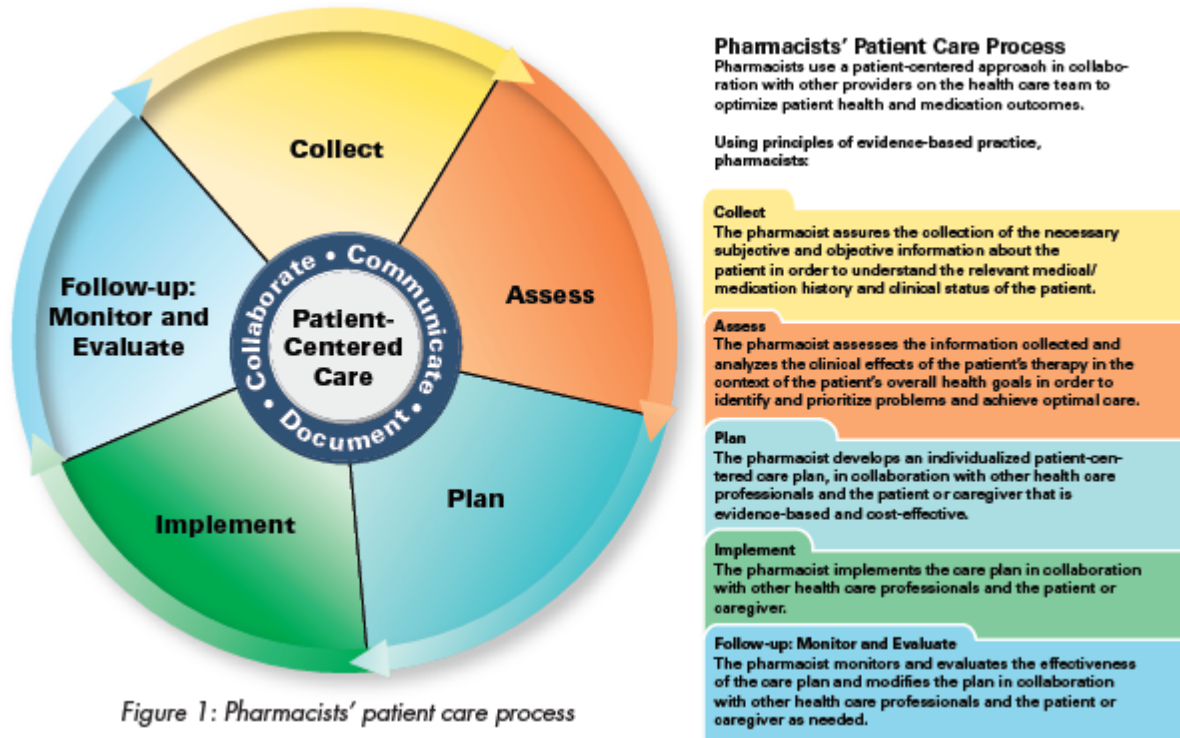

Knowledge-Based CPE Activity:

primarily constructed to transmit knowledge (i.e., facts). The facts must be based on evidence as accepted in the literature by the health care professions. Transmitting knowledge is usually assessed at the cognitive domains of remembering and understanding. The minimum amount of credit for these activities is 15 minutes or 0.25 contact hour.

Suggested Objective Verbs			Suggested Active Learning Techniques
Knowledge-type verbs (Remembering)			• Lecture
Define	Record	List	• Visuals
Label	Select	Record	• Examples
Match	State	Recall	• Illustrations
Name	Repeat		• Analogies
Comprehension-type verbs (Understanding)			• Test/Assessment
Discuss	Recognize	Restate	• Review
Describe	Identify	Express	• Writing
Explain	Translate	Classify	• Presentations
Locate	Outline	Summarize	• Matching questions/answers
Review	Report		• Questions
			• Discussion
			• Report

- For knowledge-based CPE activities, only verbs listed within this table should be used when developing objectives.

CPE Activity Guidance

When applicable, we encourage speakers to utilize the Joint Commission of Pharmacy Practitioners (JCPP) Pharmacists' Patient Care Process Model for developing learning acitivities.

Figure 1: Pharmacists' patient care process

Pharmacists' Patient Care Process
Pharmacists use a patient-centered approach in collaboration with other providers on the health care team to optimize patient health and medication outcomes.

Using principles of evidence-based practice, pharmacists:

Collect
The pharmacist assures the collection of the necessary subjective and objective information about the patient in order to understand the relevant medical/medication history and clinical status of the patient.

Assess
The pharmacist assesses the information collected and analyzes the clinical effects of the patient's therapy in the context of the patient's overall health goals in order to identify and prioritize problems and achieve optimal care.

Plan
The pharmacist develops an individualized patient-centered care plan, in collaboration with other health care professionals and the patient or caregiver that is evidence-based and cost-effective.

Implement
The pharmacist implements the care plan in collaboration with other health care professionals and the patient or caregiver.

Follow-up: Monitor and Evaluate
The pharmacist monitors and evaluates the effectiveness of the care plan and modifies the plan in collaboration with other health care professionals and the patient or caregiver as needed.

Adapted from
- ACPE Accreditation Standards for Continuing Pharmacy Education. 2017
- Phillips, L. *The Continuing Education Guide The CEU and other Professional Development Criteria*. 1994
- Framework for CPE Activity Types and Learning Objectives. ACPE. 2017
- Joint Commission of Pharmacy Practitioners (JCPP) Pharmacists' Patient Care Process. 2014