



# ACCME Certificate Programs

Enrollment Packet

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**Accreditation Council**  
for Continuing Medical Education

*learn well*

## Using this Document

This packet provides detailed information about the ACCME Certificate Programs, including program structure, content, expectations, and enrollment logistics. It is intended to serve as a resource for prospective enrollees, employers, and CE teams interested in understanding what the certificate programs entail and how they can support professional growth. If you're considering enrolling—or supporting a colleague who is—this document will walk you through what to expect and how to get started.

This version was last updated on April 20, 2026. Please refer to the ACCME website for the most current information and updates. See <https://www.accme.org/certificates>.

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# ACCME Certificate Programs

## Overview

As part of our ongoing commitment to advancing excellence in accredited continuing education (CE), ACCME is proud to introduce two new **competency-based certificate programs** designed to empower CE professionals and strengthen the organizations they serve.

These programs are more than training—they offer structured, high-value learning experiences that help professionals grow their skills and give organizations confidence in the capabilities of their teams. Through a blend of self-paced coursework, peer collaboration, live webinars, and a comprehensive final assessment, participants engage deeply with real-world tools and strategies they will use every day.

## For CE Professionals

Whether you focus on planning, reporting, or administrative oversight, these certificates will help you:

- Build practical, role-specific skills to support the work of delivering high-quality, accredited education
- Demonstrate competence by completing a comprehensive assessment for which validity evidence has been developed using established frameworks
- Strengthen your professional standing and expand your impact within your organization
- Connect with peers and engage in collaborative learning grounded in ACCME principles and practices

## For Employers and CE Program Leaders

When your staff earn an ACCME Certificate, your organization benefits from:

- Verified demonstration of skills that support your team's ability to meet accreditation and regulatory expectations
- Increased efficiency and accuracy in areas like data reporting and implementation of the Standards

- A stronger foundation for delivering education that aligns with your mission and meets the needs of your learners and stakeholders
- A clear signal of your investment in team development and operational excellence

**“We created these programs to meet the needs we hear from the CE community every day—for meaningful, practice-based learning that helps professionals thrive and gives organizations the confidence that their teams are equipped to succeed.”**

— Graham McMahon, MD, MMSc, President and CEO, ACCME

Each program follows a **three-month guided learning path** and is grounded in the knowledge and skills CE professionals need to successfully navigate the landscape of accredited continuing education.

Two certificate programs launched in 2025:

■ **ACCME Certificate in Implementing the Standards for Integrity and Independence in Accredited CE**

Support your organization’s implementation of the Standards with practical strategies and tools for protecting learners, maintaining independence, and ensuring alignment with accreditation expectations.

■ **ACCME Certificate in Data Management for Accredited CE**

Build confidence in using the Program and Activity Reporting System (PARS), improve data quality, and support effective and efficient reporting processes.

## **Competencies and Learning Objectives**

Each ACCME Certificate Program is organized around a set of clearly defined competencies and learning objectives that guide the coursework and support enrollee success. These competencies reflect the essential knowledge, skills, and behaviors needed to perform effectively in specific CE roles. The learning objectives provide a roadmap for what enrollees can expect to gain through their engagement

with the coursework, webinars, and final assessment. Together, they ensure that the certificate programs deliver practical, relevant, and high-impact learning experiences aligned with the practice-based needs of today's CE professionals.

See [Appendix I](#) for the competencies and learning objectives for the ACCME Certificate in Implementing the Standards for Integrity and Independence in Accredited CE.

See [Appendix II](#) for the competencies and learning objectives for the ACCME Certificate in Data Management for Accredited CE.



## Coursework on ACCME Academy

Each ACCME Certificate Program offers flexible, self-paced learning through ACCME Academy, with 24/7 access so you can complete the coursework on your own schedule. The 15-hour learning path for each program certificate includes a series of modules, short quizzes to check your understanding, and a summative **practice test** with sample items to help you prepare for the final assessment. Once you begin your coursework in ACCME Academy, you will also be invited to join **Collaborations**—online discussion groups where you can connect with other certificate enrollees and share learnings. Along the way, you can complete **Applied-practice Activities** that give you the chance to apply what you're learning to your own CE program.

## Learner Support Webinars

each certificate program includes two **60-minute Learner Support Webinars**: an introductory session held within the first **two weeks** of the program and a second session later in the program focused on final assessment preparation and learner check-in. These live-online sessions are your opportunity to check in with ACCME staff, ask questions, and receive coaching on your learning activities—all designed to help you stay on track and feel confident heading into the final assessment. We're here to support you every step of the way, and these webinars are a great chance to

connect with both ACCME and your fellow learners. Webinar dates are listed in the [Important Dates](#) section of this packet.

## Practice Assessment

The Practice Assessment is designed to help learners check their understanding of key competencies and learning objectives while becoming familiar with the question formats used in the Final Assessment. Although the Practice Assessment is optional, ACCME strongly recommends that learners complete it as part of their preparation for the certificate program. During each certificate cohort, the Practice Assessment will be available for one month according to the dates listed in the **Important Dates** section of this document. The Practice Assessment includes approximately **30 questions**, including **multiple-choice questions and one essay question**, and there is **no time limit** for completion. The Practice Assessment is **not remotely proctored or monitored**; however, to better reflect the Final Assessment experience, learners are encouraged to rely only on the resources provided within the assessment and not use outside materials. Performance on the Practice Assessment does **not** affect the Final Assessment score or overall certificate result. Cohort enrollees will receive information about when and how results from the Practice Assessment will be shared with learners in the webinars and via e-mail.

## Final Assessment

The final competency-based assessment serves as the culminating exam for each certificate program, offering enrollees the opportunity to demonstrate their mastery of key concepts and skills articulated in each certificate's competencies and learning objectives. This assessment will measure an enrollee's ability to apply what they have learned to real-world scenarios, testing both analytical abilities and practical knowledge and performance.

### Structure of the Final Assessment

The final assessment will be comprised of **approximately 50-60 items**, including multiple-choice questions, case-scenarios with multiple-choice questions, and an open-answer question where enrollees will review sample materials and demonstrate practice-based strategies. A character limit for the open-answer response will be provided with the essay prompt. Scoring rubrics for the open-answer questions from

each certificate's final assessment are shown below.

Assessment items have been developed by instructional designers, undergone iterative review with subject matter experts who are both internal and external to ACCME, and constructed using established validity evidence frameworks. Enrollees will have **3 hours** to complete the final assessment via an online remote-proctoring web-based platform. Materials to support enrollees—including the ACCME website and various resources included in the certificate coursework—will be available online during the final assessment. Please note that the final assessment will be administered in an online secure, proctored environment to ensure exam integrity.

## Scoring Rubrics for Open-Answer Questions

The open-answer questions for each certificate will be scored using the rubrics below. Total points that may be awarded from open-answer responses are 30 points for the Standards certificate and 30 points for the Data Management certificate, respectively. Partial credit is possible.

*Scoring Rubric for ACCME Certificate in Implementing the Standards for Integrity and Independence in Accredited CE*

<b>Criteria</b>	<b>5 – Excellent</b> (5 points)	<b>4 – Proficient</b> (4 points)	<b>3 – Developing</b> (3 points)	<b>2 – Limited</b> (2 points)	<b>1 – Inadequate</b> (1 point)
<b>Identification of Violated Standards</b>	Accurately identifies Standards-related issues, with clear explanation of each issue and its implications	Identifies most relevant issues with mostly accurate explanations	Identifies some issues, but misses or misinterprets one or more	Identifies only 1–2 issues or confuses the Standards	Fails to identify Standards-related issues or concerns
<b>Corrective Actions</b>	Provides a clear, comprehensive plan for resolving documentation gaps and removing or revising problematic materials	Suggests mostly appropriate actions, but with minor omissions	Addresses some issues but lacks detail or feasibility in corrective steps	Gives vague or incomplete steps for resolution	No realistic or relevant corrective actions provided
<b>Workflow and Process Improvements</b>	Presents a well-organized, realistic plan with sequenced steps for redesigning review processes, timelines, and staff responsibilities	Describes a feasible improvement plan but may lack full structure or depth	Suggests changes but with limited detail or unclear strategies	General or unclear suggestions not well tied to the scenario	No workflow changes proposed or described
<b>Coordination and Communication Strategy</b>	Provides concrete communication strategies tailored appropriately to stakeholders	Addresses key audiences with relevant messaging, though details may be thin	Identifies audiences but strategy is generic or underdeveloped	Mentions coordination but with minimal or impractical planning	Omits communication or provides irrelevant suggestions
<b>Use of Tools, Templates, and ACCME Resources</b>	Appropriately identifies and integrates ACCME tools and/or internal tools	Refers to most relevant tools, but integration into the plan may be limited	Mentions tools vaguely or misapplies one or more	Provides limited or unclear tool references	No tools or templates mentioned

*Scoring Rubric for ACCME Certificate in Data Management for Accredited CE*

<b>Criteria</b>	<b>5 – Excellent</b> (6 points)	<b>4 – Proficient</b> (4 points)	<b>3 – Developing</b> (3 points)	<b>2 – Limited</b> (1 points)
<b>Problem Identification</b>	Accurately identifies all major issues	Identifies most major issues, with some details missing or misstated	Identifies general problem areas but lacks clarity or depth	Fails to recognize key reporting or planning issues
<b>Understanding of Roles and Stakeholders</b>	Clearly identifies who produces, reviews, and uses data (e.g., CE staff, boards, learners); explains role-based expectations	Recognizes internal vs. external roles but lacks full clarity on responsibilities	Acknowledges multiple stakeholders but is vague or inconsistent	Fails to distinguish who needs to do what or why
<b>Remediation Strategy</b>	Specific steps provided in appropriate order to resolve problem(s)	Suggests appropriate steps but lacks detail or sequence	Suggests some action but lacks practicality or accuracy	Suggests actions that are irrelevant or inadequate
<b>Prevention Plan</b>	Offers clear approaches and resources that will prevent the problem(s) from occurring in the future.	Offers feasible ideas, some tied to planning or documentation, but not comprehensive	Suggests partial strategies that don't fully address root causes	No clear plan or unrealistic solutions
<b>Use of Tools, Templates, and ACCME Resources</b>	Appropriately identifies and integrates use of tools, templates, and ACCME resources into the prevention plan	Refers to relevant tools, but integration into the prevention plan may be limited	Provides limited or unclear tool references with poor integration into prevention plan	No tools or templates mentioned

## Scoring the Final Assessment

Enrollees must achieve a score of 75% or higher on the final assessment to receive a program certificate. The final assessment score is comprised of a total of 100 points. Seventy percent (70%) of the score will be calculated from the multiple-choice questions and thirty percent (30%) of the score will be calculated from the open-answer question. The open-answer item is evaluated according to a grading rubric and partial credit is given.

## Final Assessment Results and Certificate

Enrollees will receive the results of their final assessment within six weeks after the assessment window closes. Enrollees who complete the assessment will not receive a copy of the final assessment. However, they will be provided online access to their score and a Strengths and Opportunities Report that indicates their performance across the competencies and learning objectives of the certificate program.

Final assessment results will be available for 15 business days (excluding holidays) following the release of results to enrollees. After this period, results will no longer be accessible. Enrollees are responsible for downloading and retaining their Strengths and Opportunities Report for their records within the designated access period. Enrollees who successfully pass the final assessment will receive their program certificate when they receive their results. Enrollees who do not pass the final assessment may re-take it in the next calendar cohort for a fee of \$200.

## For Employers

ACCME can confirm certificate completion and standing upon request; however, all individual exam results are confidential and will not be shared. If your organization needs to verify your status as a certificate recipient, please contact [education@accme.org](mailto:education@accme.org).

## Rules and Expectations

### Coursework and Webinars

The ACCME Certificate Programs are designed to help accredited CE professionals build both knowledge and practical skills aligned with the competencies and learning objectives outlined for each certificate. While ACCME will provide a recommended learning path and timeline to guide your progress, completion of the coursework and engagement in the Collaborations on ACCME Academy and participation in the

Learner Support Webinars is encouraged—but not required. As an enrollee, you are responsible for your own self-directed learning and mastery of the material.

## Professionalism

We expect all participants to engage in a collegial, professional, and supportive manner when interacting with peers in online Collaborations and during Learner Support Webinars.

## Exam Security

You must also comply with the technical and behavioral requirements for the secure, remote-proctored final assessment, including video surveillance and temporary installation of an Internet browser plug-in. These procedures and expectations will be provided to enrollees in advance of the remote-proctored final assessment.

## Intellectual Property and Copyright

Participants are expected to adhere to high ethical standards and are strictly prohibited from capturing, transmitting, or distributing any assessment content, ACCME Academy coursework, and any other related intellectual property in any format. All content shared within the ACCME Certificate Programs is confidential and is intended for personal use only by the registered enrollee.

Failure to meet these expectations may result in the revocation of your enrollment, disqualification from future ACCME Certificate Programs, and potential legal action.

## Disclosure of Artificial Intelligence (AI) Use

Artificial Intelligence (AI) tools (ChatGPT 5.2 and Microsoft Copilot) supported curriculum development, assessment drafting and review, analysis of de-identified learner data, and rubric-based review of open-ended responses in the certificate programs. AI was used for drafting, organization, synthesis, and pattern recognition. All outputs were reviewed, edited, and approved by qualified ACCME staff and subject-matter experts, who retained full responsibility for educational design, assessment validation, scoring, and alignment with ACCME requirements and evidence-based standards. No personally identifiable information was entered into AI systems. This disclosure reflects ACCME guidance on transparency and appropriate human oversight in the responsible use of AI.

## Use of the Certificate

Earning an ACCME Certificate is an achievement worth celebrating—it represents your personal commitment to professional growth and confirms that you have successfully demonstrated competence in the knowledge and skills covered by the program. ACCME will provide guidance on how to showcase your accomplishment, including use of the certificate mark on social media, resumes, and other professional materials. Please note that this certificate is not a professional certification; it reflects your individual completion of the program and passing of the final assessment. It does not confer any approval, endorsement, or accreditation status to your organization, nor should it be used to imply compliance with ACCME requirements or predict accreditation outcomes.

## Enrollment

### Who Can Enroll?

There are no pre-requisites to enroll in either ACCME Certificate Program. Those who enroll in ACCME Certificate in Data Management for Accredited CE will receive credentials for a temporary ACCME PARS Sandbox account. Enrollees will use this Sandbox account for coursework-based Learning Activities to protect actual organizational data in PARS/JA-PARS. **Important:** Once the final assessment for the enrollee's cohort opens, they will no longer have access to the PARS Sandbox and the user account will be deleted.

### Fees

**Accredited Provider:** \$375 (includes access to all certificate coursework on ACCME Academy, registration for the two Learner Support Webinars, and a reserved spot to take the remote-proctored final assessment)

**Non-Accredited:** \$525 (includes access to all certificate coursework on ACCME Academy, registration for the two Learner Support Webinars, and a reserved spot to take the remote-proctored final assessment)

Certificate Program fees are non-refundable but may be transferred to another enrollee until the program start date. Payments must be received by ACCME before the final enrollment date of the program to confirm your registration. Please refer to the **Important Dates** for program dates.

Secure online payments can be made during the registration process at [www.accme.org/certificates](http://www.accme.org/certificates).

We accept payments via **Visa**, **MasterCard**, and **American Express** for your convenience. Upon successful payment, a confirmation email and receipt will be sent to your registered email address.

If you plan to pay by **invoice**, **ACH**, or **check**, please contact us at [education@accme.org](mailto:education@accme.org) for further instructions on how to submit payment for the certificate program.

## Deferral Requests

Learners enrolled in ACCME Certificate programs may request deferral to the next scheduled certificate program cohort. Each enrollee is allowed one deferral, which must be to the next calendar cohort.

Enrollees who have not started their coursework may defer enrollment to the next scheduled cohort free of charge.

Enrollees who have already begun certificate coursework must pay a \$100 administrative fee per program for deferral processing.

However, any deferral requests made within the last two weeks of the program, leading up to the final assessment timeframe, or during the final assessment window, require a \$200 administrative fee per program.

Enrollees who do not request a deferral and do not complete the final assessment may register for a future cohort at the published registration fee, if desired.

For further information regarding this policy, contact [education@accme.org](mailto:education@accme.org).

## Important Dates for ACCME Certificate Programs

The following dates apply to all ACCME Certificate Programs in the *Summer 2026 Cohort*.

Enrollment Opens	Monday, April 20
Enrollment Deadline	Friday, May 29
Final Day for Payment	Sunday, May 31
Program Starts	Monday, June 8
Learner Support Webinar #1	Thursday, June 11 at 1:00 pm CT
Learner Support Webinar #2	Wednesday, July 22 at 1:00 pm CT
Practice Assessment Opens (Optional, Recommended) *	Monday, July 13 at 9:00 am CT
Practice Assessment Closes (Optional, Recommended) *	Thursday, August 13 at 9:00 pm CT
Deadline to Request Final Assessment Accommodations	Thursday, August 13
Final Assessment Opens (Required)*	Monday, August 24 at 9:00 am CT
Final Assessment Closes (Required) *	Wednesday, September 9 at 9:00 pm CT

\* **All exam deadlines close at 9:00 pm CT** unless otherwise noted. **No extensions** will be granted, and closed exams will not be reopened.

Enrollees who register by the enrollment deadline will receive a confirmation email and instructions on accessing their coursework. Please ensure you check your inbox and spam folder to ensure you receive this important communication.

## Upcoming Cohort

Registration for the **Winter Cohort 2026–27** opens on **Monday, October 12, 2026**, and the cohort begins on **Monday, January 4, 2027**.

## System Requirements

To ensure your full participation, enrollees should make sure they can meet the following system requirements for accessing your online coursework via the online learning portal ACCME Academy, for participating in the Learner Support webinars, and for completing the online remote-proctored final assessment.

### ACCME Academy

- A stable Internet connection is required.
- **No specific hardware requirements:** ACCME Academy operates as a web-based application, meaning it does not require specific hardware or software installations beyond a standard computer or device with a web browser.
- **Browser support:** ACCME Academy supports multiple web browsers, including Chrome and Firefox. Internet Explorer is not supported.
- **Responsive design:** The learner experience is designed to be responsive, meaning it adapts to different screen sizes, ensuring a good user experience on various devices.
- **Accessibility:** ACCME Academy strives to conform with WCAG 2.0 standards for learner experiences.

### Webinars

Learner support webinars will be conducted using Zoom.

- **Operating Systems:** macOS X 10.9 or later | Windows 7, 8, 8.1, 10 (S Mode not supported), 11
- **Internet:** Broadband wired or wireless (3G/4G/LTE)
- **Hardware:** Webcam, microphone, and speakers (built-in, USB, or Bluetooth)
- **Bandwidth:** Minimum 1.0 Mbps for video; higher speeds required for HD
- **Browsers:** Chrome, Firefox, Edge, and Safari (current and past two versions)

### Exam Tutorial (Mock Exam)

The **Exemplify Tutorial**, also referred to as the **Mock Exam**, is designed to help learners become familiar with the Exemplify testing platform before engaging in the Practice Test and Final Assessment. It offers a brief but comprehensive overview of the Exemplify software to help enrollees become comfortable with features and tools in advance and confirm their computer is ready for testing. Although the tutorial is

not remote-proctored (through video or audio recording), your device will be disconnected from the Internet while the tutorial is in progress. The Exemplify Tutorial is intended for preparation only. ACCME strongly recommends that all enrollees complete the Exam Tutorial.

## System Requirements

System requirements for using ExamSoft and Exemplify are listed below. Please note: Enrollees must have a device that meets these requirements to take the Exam Tutorial, Practice Assessment, and Final Assessment. ACCME will communicate the details of this process in advance.

- **Operating Systems:** macOS X 10.9 or later (Chromebooks, Android, or Linux operating systems are not supported) | Windows 7, 8, 8.1, 10 (S Mode not supported), 11
- **Internet:** Stable broadband or wireless connection with a minimum 2.5 Mbps upload speed required
- **Hardware:** Webcam, microphone (Integrated or External USB webcam), and speakers (Built-in, USB, or Bluetooth)
- **Browsers:** Chrome, Firefox, Microsoft Edge, and Safari (current and past two versions)

## Accommodations for the Final Assessment

ACCME is committed to providing an inclusive and accessible learning environment for all participants.

Requests for accommodations related to participation in the **final assessment** must be submitted by email no later than the **closing date of the practice test**. This timeframe is required to allow ACCME to review the request and make appropriate arrangements. Practice test dates are listed in the **Important Dates** section of the Enrollment Packet.

To request accommodations, please contact us at [education@accme.org](mailto:education@accme.org).

## Quick Answers

**How often will the Certificate programs be offered?** We're excited to offer our certificate programs twice a year, once in the Summer and once in the Winter. With two cohorts annually, you'll have flexible opportunities to join a program that fits your schedule while still getting the full benefit of a structured, high-quality learning experience.

### **How long will I have access to the Certificate Program resources on ACCME Academy?**

Certificate program coursework and materials in ACCME Academy are available only during the program and will no longer be accessible once the program concludes.

### **How long will final assessment results remain available?**

Final assessment results will be available for 15 business days (excluding holidays) following the release of results to enrollees. After this period, results will no longer be accessible. Enrollees are responsible for downloading and retaining their Individual Strengths and Opportunities Report for their records within the designated access period.

### **Do earned ACCME Program Certificates expire?**

At this time, ACCME has not set an expiration date for the program certificates. However, we will actively explore ways to support ongoing learning to help ensure continuing competence for those who complete the certificate programs. We'll provide more guidance on this in the future as the certificate programs evolve.

### **Are the Certificate Programs available to enrollees outside of the US?**

Yes. Access to ACCME Academy, the Learner Support Webinars, and the remote-proctored final assessment will be available to enrollees worldwide.

### **Can I enroll in both certificate programs?**

Yes, you can enroll in both certificate programs. Please remember that enrollees for the ACCME Certificate in Data Management for Accredited CE **must** have access to a user account in ACCME's Program and Activity Reporting System (PARS).

## Contact Us

For any questions regarding the ACCME Certificate Programs, please contact [education@accme.org](mailto:education@accme.org).

# Appendix I: Competencies and Learning Objectives for the ACCME Certificate in Implementing the Standards for Integrity and Independence in Accredited CE

## Module 1: Introduction to the Standards for Integrity and Independence

### Competencies

**Competency 1.0:** Develop a deep understanding of the historical context and evolution of the ACCME Standards.

**Competency 1.1:** Engage in reflective discussions about how these Standards support the trustworthiness of accredited CE.

### Learning Objectives

#### Overview of the Standards

- LO-1. Explain the purpose of the Standards for Integrity and Independence.
- LO-2. Assess the role the Standards play in preserving trust in accredited CE and ensuring educational content remains free from commercial bias.

#### Historical Evolution of the Standards

- LO-3. Describe the evolution from the Standards for Commercial Support to the current Standards for Integrity and Independence.
- LO-4. Effectively communicate with CE planners, faculty, and administrators about the value of independence and how implementing the Standards serves multiple stakeholders.

## Module 2: Eligibility

### Competencies

**Competency 2.0:** Comprehend the ACCME's eligibility criteria for accreditation, including the distinction between eligible and ineligible organizations.

**Competency 2.1:** Apply eligibility criteria to assess an organization's qualification for ACCME accreditation.

**Competency 2.2:** Engage in discussions to evaluate organizational structures concerning eligibility.

### Learning Objectives

#### Eligibility Overview

LO-5. Explain the rationale behind the eligibility rules of the Standards for Integrity and Independence.

#### Identifying Eligible and Ineligible Organizations

LO-6. Identify eligible and ineligible organizations for ACCME accreditation.

#### Assessing Organizational Structures

LO-7. Use scenarios involving various corporate relationships to evaluate eligibility and its implications.

LO-8. Apply ACCME's self-assessment questions to real-world cases to ascertain eligibility status.

## Module 3: Ensure Content is Valid (Standard 1)

### Competencies

**Competency 3.0:** Understand the rationale behind and the concepts within requirements for ensuring content validity.

**Competency 3.1:** Articulate effective strategies for ensuring valid CE content through administrative oversight, structured peer review, and faculty guidance.

**Competency 3.2:** Demonstrate effective collaboration with peers and CE stakeholders (e.g., planners, faculty) to ensure that CE content adheres to the requirements of Standard 1.

## Learning Objectives

### Content Validation

- LO-9. Identify key factors that ensure accredited CE content is valid, evidence-based, and aligned with safe and effective patient care.
- LO-10. Develop strategies for evaluating what scientific research can be used in accredited continuing education.
- LO-11. Apply structured content review processes to ensure compliance with Standard 1, using tools and frameworks to assess content validity.

### Managing Controversial Topics

- LO-12. Develop strategies to address controversial or emerging topics in ways that adhere to Standard 1.
- LO-13. Demonstrate communication and facilitation with education planners and faculty to promote the proper management of controversial topics.

## Module 4: Prevent Commercial Bias and Marketing in Accredited Continuing Education (Standard 2)

### Competencies

**Competency 4.0:** Recognize the importance of maintaining a clear separation between accredited CE and marketing.

**Competency 4.1:** Apply tools and policies to ensure that accredited CE remains independent from commercial influence.

**Competency 4.2:** Engage stakeholders in discussions about the importance of maintaining this separation.

## Learning Objectives

### **Preventing Any Influence or Involvement from the Owners and Employees of an Ineligible Company on Accredited CE**

- LO-14. Explain the importance of ensuring that ineligible company owners and employees do not have any influence or involvement in accredited education.
- LO-15. Articulate ways in which ineligible company owners and employees could influence, or control decisions related to the planning, faculty selection, delivery, and evaluation of accredited education.
- LO-16. Apply strategies to ensure that ineligible company owners and employees do not influence or control decisions related to the planning, faculty selection, delivery, and evaluation of accredited education.

### **Protecting Learners from Marketing or Sales of Products or Services**

- LO-17. Explain the importance of ensuring that accredited education is free of marketing or sales of products or services.
- LO-18. Apply strategies to ensure that faculty do not actively promote or sell products or services that serve their professional or financial interests during accredited education.

### **Protecting Learners' Private Information**

- LO-19. Explain the importance of seeking consent before sharing the names or contact information of learners with any ineligible company or its agents.
- LO-20. Implement strategies to ensure that the accredited provider obtains explicit consent before sharing the names or contact information of learners with any ineligible company or its agents.

## **Module 5: Identify, Mitigate, and Disclose Relevant Financial Relationships (Standard 3)**

### Competencies

**Competency 5.0:** Understand the requirements for identifying, mitigating, and disclosing financial relationships with ineligible companies.

**Competency 5.1:** Facilitate strategies and processes for obtaining all financial relationships with individuals in control of content, identifying and mitigating relevant financial relationships, and ensuring appropriate disclosure to learners.

**Competency 5.2:** Collaborate effectively with CE administrators, faculty, and planners to ensure Standard 3 practices meet compliance expectations.

## Learning Objectives

### Collect Information

- LO-21. Explain why it is important to collect all financial relationships with ineligible companies from all individuals who are in a position to control accredited CE content.
- LO-22. Describe a process to gather pertinent and timely information regarding financial relationships for all individuals who are in a position to control accredited CE content.

### Exclude Owners or Employees of Ineligible Companies

- LO-23. Explain why owners or employees of ineligible companies cannot have a role in accredited CE.
- LO-24. Describe the three exceptions to this exclusion where owners or employees of ineligible companies can participate as planners or faculty in specific situations.
- LO-25. Use Standards tools and resources to inform and communicate decisions about when to include or exclude owners or employees of ineligible companies in accredited CE.

### Identify Relevant Financial Relationships

- LO-26. Explain what defines a relevant financial relationship for individuals who are in a position to control accredited CE content.
- LO-27. Identify relevant financial relationships using Standards resources and tools.

### Mitigate Relevant Financial Relationships

- LO-28. Take appropriate steps to prevent those with relevant financial relationships from inserting commercial bias into accredited CE content.
- LO-29. Document the steps taken to mitigate relevant financial relationships.

## **Disclose All Relevant Financial Relationships to Learners**

- LO-30. Explain the importance of disclosure to learners.
- LO-31. Use Standards tools and resources to develop appropriate disclosure to learners.
- LO-32. Ensure that disclosure to learners occurs and can be verified at the time of accreditation.

## **Module 6: Manage Commercial Support Appropriately (Standard 4)**

### Competencies

**Competency 6.0:** Understand the definition and requirements for managing commercial support.

**Competency 6.1:** Apply appropriate safeguards to ensure educational independence from commercial supporters.

**Competency 6.2:** Communicate with learners about the source and nature of commercial support.

### Learning Objectives

#### **Define Commercial Support in Accredited CE**

- LO-33. Contrast financial and in-kind support from ineligible companies.

#### **Decision-making and Disbursement**

- LO-34. Contrast the responsibilities of accredited CE providers vs ineligible companies related to independence, commercial bias, and commercial influence.
- LO-35. Demonstrate what commercial support may and may not be used for in an accredited CE program.

#### **Agreement**

- LO-36. Use written agreements to manage commercial support in compliance with Standard 4.

## Accountability

- LO-37. Maintain a record of commercial support received and how it was used.
- LO-38. Produce an accounting, upon request by the accrediting body or by the ineligible company, of commercial support received and how it was used.

## Disclosure to Learners

- LO-39. Apply Standards tools and resources to ensure required disclosure is made to learners.
- LO-40. Properly document that disclosure to learners has been executed before the educational activity taking place.

# Module 7: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education (Standard 5)

## Competencies

**Competency 7.0:** Understand the similarities and differences between commercial support and marketing by ineligible companies or nonaccredited education associated with accredited CE.

**Competency 7.1:** Apply strategies to ensure that accredited education is separate from marketing by ineligible companies or non-accredited education.

**Competency 7.2:** Collaborate with stakeholders to ensure the separation between accredited education and other activities.

## Learning Objectives

### Separation of Accredited Education from Other Ancillary Activities

- LO-41. Distinguish prohibited roles and processes for ineligible companies to have in accredited education.
- LO-42. Apply strategies to ensure separation between marketing by ineligible companies—including advertising, sales, exhibits, and promotion—and nonaccredited education by ineligible companies that market or exhibit in conjunction with accredited education.

## Protecting Learners

- LO-43. Articulate ways to demonstrate clear separation between accredited education and other activities.
- LO-44. Ensure that learners can easily distinguish between accredited education and other activities.
- LO-45. Ensure that ineligible companies do not provide access to, or distribute, accredited education to learners.

## Module 8: Implement the Standards Across an Accredited CE Program

### Competencies

**Competency 8.0:** Understand key factors that contribute to common areas of noncompliance with the Standards.

**Competency 8.1:** Use ACCME toolkits and resources to develop implementation processes that prevent noncompliance with the Standards.

**Competency 8.3:** Engage with staff, faculty, leadership, and learners to ensure compliance with the Standards.

### Learning Objectives

- LO-46. Recognize key administrative factors that can lead to noncompliance with the Standards.
- LO-47. Develop management and administrative strategies to support program-wide compliance with the Standards.

# Appendix II: Competencies and Learning Objectives for the ACCME Certificate in Data Management for Accredited CE

## Module 1: Introduction to CE Data Reporting

### Competencies

**Competency 1.0:** Understand the purpose and strategic value of data reporting using the Program and Activity Reporting System (PARS/JA-PARS).

**Competency 1.1:** Contrast the purposes and processes of activity reporting versus learner reporting using PARS/JA-PARS.

**Competency 1.2:** Understand the roles and responsibilities of CME/CE providers related to data reporting and PARS/JA-PARS.

**Competency 1.3:** Define and contrast the roles, functions, and needs of various stakeholders for CME/CE data reporting.

**Competency 1.4:** Access and navigate PARS/JA-PARS to complete basic tasks such as logging in and using the interface.

### Learning Objectives

- LO-1. Explain the purpose and strategic value of CME data reporting using the Program and Activity Reporting System (PARS/JA-PARS).
- LO-2. Contrast the purposes and processes for activity reporting and learner reporting using PARS/JA-PARS.
- LO-3. Describe the roles and responsibilities of CME/CE providers for data reporting with PARS/JA-PARS.
- LO-4. Contrast various stakeholder roles, functions, and needs for CME/CE data reporting.
- LO-5. Use PARS/JA-PARS effectively to complete basic tasks such as logging in and using the interface.

## Module 2: Managing Activities in PARS

### Competencies

**Competency 2.0:** Understand and contrast different approaches to add and manage CME/CE activities in PARS/JA-PARS.

**Competency 2.1:** Successfully add and manage CME/CE activities in the activity web form, ensuring all required fields are completed and accurate data is entered.

**Competency 2.2:** Successfully add and manage multiple CME/CE activities using batch upload, Microsoft Excel files, resolve errors, and update activities as needed.

**Competency 2.3:** Monitor and maintain ongoing CME/CE activities by making necessary edits, closing completed activities, and adhering to ACCME reporting requirements.

### Learning Objectives

#### Manually Adding Activities

- LO-6. Identify the required fields and information for creating an activity.
- LO-7. Manually add activities.
- LO-8. Correctly resolve errors in manual entry.

#### Batch Uploading Activities

- LO-9. Properly upload activity data via batch upload.
- LO-10. Correctly resolve errors in batch uploads.

#### Activity Management

- LO-11. Modify existing activities, including editing and updating, in accordance with ACCME reporting requirements.
- LO-12. Manage activities, including viewing, restoring, and deleting, in accordance with ACCME reporting requirements.

#### Updating Aggregate Learner Counts

- LO-13. Update aggregate learner counts.
- LO-14. Update enduring materials and multi-year learner count.

## Closing Activities

LO-15. Explain the requirements for closing activities.

LO-16. Manually close individual or multiple activities.

## Module 3: Reporting CE Learners in PARS

### Competencies

**Competency 3.0:** Accurately prepare individual learner data by ensuring you are capturing the data fields needed to report learner data.

**Competency 3.1:** Accurately enter individual learner completion data using both manual and batch processes.

**Competency 3.2:** Troubleshoot common learner reporting issues to maintain data integrity and fulfill ACCME requirements.

### Learning Objectives

#### Manually Adding Learners

LO-17. Identify the information required to report learner completion data.

LO-18. Properly report learner data manually.

LO-19. Troubleshoot errors when manually entering learner data.

#### Batch Uploading Learners

LO-20. Properly upload learner data via batch upload.

LO-21. Correctly resolve errors in learner batch uploads.

## Module 4: Registering Activities and Reporting Learners for Maintenance of Certification/Continuing Certification (MOC/CC)

### Competencies

**Competency 4.0:** Understand and apply the requirements for the CME for Maintenance of Certification (MOC) collaboration to ensure compliant participation.

**Competency 4.1:** Understand the MOC credit types and apply this knowledge when deciding what activities to register for the different MOC types across all participating certifying boards.

**Competency 4.2:** Understand and apply the requirements for MOC data reporting.

**Competency 4.3:** Efficiently register activities for MOC in PARS/JA-PARS.

**Competency 4.4:** Report MOC credit for individual learners to certifying boards via PARS/JA-PARS.

## Learning Objectives

### Understanding CE for MOC/CC

LO-22. Summarize the requirements for CME for Maintenance of Certification (MOC) collaboration to ensure compliant participation.

LO-23. Determine what activities to register for which MOC credit types across all participating certifying boards.

### Adding and Managing Activity and Learner Data in PARS

LO-24. Register activities for MOC.

LO-25. Submit learner credit data.

## Module 5: Generating PARS Reports

### Competencies

**Competency 5.0:** Understand how you can use PARS/JA-PARS reports to verify data integrity, support stakeholders, and conduct program analysis for accreditation purposes (such as Commendation and Program Improvement).

**Competency 5.1:** Use search and filtering techniques to manage and export activity and learner data.

**Competency 5.2:** Understand and generate standard reports in PARS.

### Learning Objectives

#### Activity and Learner Search Functions

LO-26. Use search and filter functions correctly to manage activity and learner data.

## PARS Reports

LO-27. Explain how and why to use reports in PARS.

LO-28. Generate standard reports accurately and effectively for both internal and external use.

## Module 6: Annual Reporting

### Competencies

**Competency 6.0:** Understand the purpose and value of administrative requirements for accreditation, and best practices for annual reporting to the system, learners, and stakeholders.

**Competency 6.1:** Prepare activity and aggregate learner data accurately for annual reporting, including multi-year enduring materials, in compliance with submission deadlines.

**Competency 6.2:** Complete year-end reporting tasks, including updating contact information, accepting the ACCME annual agreement, and submitting the Program Summary in PARS/JA-PARS.

**Competency 6.3:** Manage the closure of CE activities and ensure accuracy in learner counts and other year-end data.

### Learning Objectives

#### Understanding Annual Reporting Requirements and the Reporting Process

LO-29. Explain the purpose, value, and best practices of annual reporting.

LO-30. Identify annual reporting requirements, including required data, key deadlines, and helpful tools.

LO-31. Prepare activities and learner counts for annual reporting.

#### Tasks for Annual Reporting

LO-32. Review and update your organization's contact information.

LO-33. Accept the Annual Agreement.

LO-34. Properly complete and submit the Program Summary.

## Module 7: Data Integrity and Troubleshooting

### Competencies

**Competency 7.0:** Implement best practices for maintaining data accuracy and integrity across activity and learner reporting in PARS/JA-PARS.

**Competency 7.1:** Identify and resolve common data entry and submission errors in PARS/JA-PARS to ensure high-quality and accurate data

**Competency 7.2:** Apply troubleshooting strategies to address issues encountered during manual entry and batch upload processes.

### Learning Objectives

#### Ensuring Data Accuracy

LO-35. Update activity and learner data as needed to ensure data accuracy.

LO-36. Apply best practices for maintaining accurate records.

#### Building Processes

LO-37. Build reliable workflows for data accuracy.

LO-38. Proactively troubleshoot data entry issues.

## Module 8: PARS Management Strategies and Stakeholder Engagement

### Competencies

**Competency 8.0:** Use PARS/JA-PARS as a strategic tool for CME/CE program improvement.

**Competency 8.1:** Demonstrate effective communication strategies for working with learners, CME/CE staff, and stakeholders in managing data and processes.

**Competency 8.2:** Apply administrative and business strategies to manage the workflows related to PARS/JA-PARS while ensuring accuracy and alignment with stakeholder expectations.

## Learning Objectives

### **PARS as a Strategic Tool for CE Program Improvement**

- LO-39. Explain how to use PARS/JA-PARS data to evaluate and improve CME/CE programs.
- LO-40. Describe how insights from PARS/JA-PARS data can be leveraged to drive program outcomes and meet your organizational goals.

### **Communication and Administrative Strategies for Managing Learners and Their Data**

- LO-41. Summarize strategies and best practices for collaborating with CME/CE staff and stakeholders on data entry and reporting.
- LO-42. Explain strategies for managing learner relationships, ensuring accurate data, and enhancing engagement with CME/CE activities.