



We help the world breathe®
PULMONARY • CRITICAL CARE • SLEEP

2018 COI Reviewer Instructions For Conference Session Chairs and Chairs of ATS Chapter & Other CME Activities v20183

Keep Open in a Separate Window (or Print) to Consult while Reviewing

Deadline for COI Review for 2018 Conference: April 1

Why the ATS Requires Session Chairs to Manage Session COI:

The Accreditation Council on Continuing Medical Education (ACCME) requires that the ATS (1) obtain from all presenters, chairs, and other planners of CME-accredited activities declarations of financial relationships with commercial interests that are relevant to the subject matter of the session, and (2) review these and resolve (manage) any conflicts of interest (COI) prior to the Conference, to ensure that the CME delivered is balanced and free of commercial bias. Therefore the ATS must call upon you as the “person in control” of your session, with expert knowledge of the subject matter, to assess and report to the ATS, and ensure that all COI relevant to your session are resolved.

Four Steps:

Step 1 - Log-in to the ATS COI Website

1. **Go to** the log-in page at <https://thoracic.coi-smart.com>. **Enter** your ATS-issued COI website **Login ID** (the “username” that was sent to you by email). For ATS members, this is typically your 4 to 6 digit ATS member #, excluding preceding zeroes.
2. **Enter** your **Password** (set at first use) and **click Login**. If you’ve **misplaced** your Login ID or need to **set** your Password, click on “**Forgot ...**” and enter your email address. You’ll receive an email from “noreply@coi-smart.com” with ID and password instructions. A link to “**Quick Tips for Log-in & Site Use**” is also available on the log-in page.

Step 2 – Go to Your “Reviewer Queue”

1. Once logged in, **click Reviewer** on **left** of screen.
2. Then **click In Review** below *Reviewer* tab. That brings you to your **Reviewer Queue** – a list of your session’s faculty who are ready for chair review. (**Note:** you must have already filed your own 2018 questionnaire to see your *Reviewer Queue*. If you haven’t, instead click *My Questionnaires*, then 2018 ATS COI Questionnaire. Once completed, log back into the site and follow the steps above.)
3. If session is co-chaired, **only one co-chair has to review each presenter** (you can divide up reviews as you wish). Each co-chair must be reviewed by the other co-chair (the other “person in control”).
4. If one of your **presenters** (or **co-chair isn’t listed**), he/she **hasn’t yet filed for 2018**. ATS e-mails all “non-respondents” weekly. Please also encourage him/her to file. Then return by April 1 to review.

Step 3 – Review Disclosures

1. **Click** on the **name** of a presenter (or co-chair if one) in your “*Reviewer Queue*.” (Click on his/her 2018 Questionnaire entry if more than one.)
2. Then **click** the “**Perform Review**” option. A box will appear with his/her 2018 responses.
3. Use the bar on the right side of that box to **scroll down and review** his/her disclosures, in order to **(A)** see if any **commercial interests** were disclosed, and if so **(B)** see the **types of relationships** involved and **(C)** **judge their relevance** to his/her content or role.
(**Note:** 2/3rds of ATS respondents report no commercial interests and can be reviewed quickly.)

Step 4 – Grade and Manage (Resolve)

1. Use the main scroll bar on right of your screen to move down to the **box below “Review Action Type”**, and **click** it to open the drop-down menu of **ATS grading options**.
2. **Grade the person as a whole**. If no relevant commercial interest (COI) exists, click **Option 1**. If one or more exists, choose from **Options 2-8**. Each has a management step (action) acceptable to the ACCME.

- 3. Choose the one option that you think best grades the person's disclosures and resolves any COI. Different types of involvement typically justify different grades and management.** For example, for CME, in addition to the required disclosure to learners (audience), options include:
- **Option 4** (ensuring that the best available evidence is presented) may be appropriate if the COI is industry-funded research overseen by an institution, service on an independent DSMB, or on a scientific advisory committee.
 - **Option 5** (peer reviewing the content) or **Option 6** (having the person refrain from making clinical recommendations relevant to the COI) are typically preferred if the COI is: a consultant role; an industry-controlled speaker bureau (note: industry-supported CME that is independently controlled is not seen as a COI); expert testimony for a company or its law firm; personal investments in a relevant com; intellectual property rights that are relevant to the subject matter, such as a patent, whether granted or pending.
 - Occasionally, a person's relevant commercial interest(s) may seem to you "unresolvable." **Options 7 and 8** can be used to inform ATS of this and obtain consultation.
4. "Send Email" is available (scroll down) to tell the person of a needed action.
 5. When done reviewing and grading this person, click "SAVE" at the bottom of screen.
 6. To review more (other) session faculty: scroll back up, click the other person's name, and use the same steps as above for each.
 7. To exit your reviewing (and the COI website) click "Log Out" on upper right of screen.

ATS GRADING OPTIONS FOR COI

- **Conference Option 1:** No relevant COI found. The content is free of commercial bias. *(Manage by monitoring the presentation and clarifying for audience anything that could be perceived as commercial bias.)*
- **Conference Option 2:** Past relevant COI, or a current one ending before event. Resolved by disclosure to audience and content free of commercial bias. *(Manage by monitoring the presentation and clarifying for audience anything that could be perceived as commercial bias.)*
- **Conference Option 3:** He/she is an industry employee. Resolved by ATS managing per ACCME policies. *(ATS staff will contact the chair and presenter once this is known.)*
- **Conference Option 4:** Current relevant COI. Resolved by the content presenting the best available evidence. *(Make sure the presentation provides the best available evidence. Clarify for the audience any content that could be perceived as biased.)*
- **Conference Option 5:** Current relevant COI. Resolved by the Chair arranging peer review of content. *(You, or another expert contacted by you who doesn't have the relevant COI, reviews the content in advance to ensure that it is free of commercial bias.)*
- **Conference Option 6:** Current relevant COI. Resolved by teeling and ensuring that he/she makes no recommendations affecting that commercial interest. *(Tell the person to make no clinical recommendations that are relevant to their commercial interest, to avoid any appearance of commercial bias.)*
- **Conference Option 7:** Current relevant conflict. Resolved through ATS consultation. *(Use Comments box to explain.)*
- **Conference Option 8:** Current relevant conflict that appears unresolvable. *(Use Comments box to explain.)*

For your information: ACCME and ATS Definitions

- **CONFLICT OF INTEREST:** The ACCME considers financial relationships to create conflicts of interest in CME when individuals have both a financial relationship with a commercial interest and the opportunity to affect the content of CME about the products or services of that commercial interest. The potential for maintaining or increasing the value of the financial relationship with the commercial interest creates an incentive to influence the content of the CME—an incentive to insert commercial bias.
- **COMMERCIAL INTEREST:** ACCME: Any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. The ACCME does not consider providers of clinical service directly to patients to be commercial interests. ATS notes as examples:
 1. Any compensable services that you or your spouse provide to a commercial entity that has business interests relevant to the subject of your ATS activity, such as a pharmaceutical or medical device company, product manufacturer, investment firm or law firm, even if uncompensated. Common examples include industry consulting, advisory committees, speaking, and expert testimony.
 2. Any equity interests of you or your spouse in a relevant entity, including stock, stock options, or other ownership interest, excluding general mutual funds;
 3. Intellectual property rights of you or your spouse/partner that are relevant, such as a patent (granted or pending) or copyright.
- **FINANCIAL RELATIONSHIPS:** The ACCME defines these as financial relationships (held by the discloser or by the spouse or life partner if one) in any amount that create a COI and that occurred in the 12-month period preceding the time that the individual was asked to assume a role controlling content of the CME activity. The ACCME has not set a minimal dollar amount—any amount, regardless of how small, creates the incentive to maintain or increase the value of the relationship.”

Questions about COI website use? Contact John Harmon at coioffice@thoracic.org or 212-315-8611. COI grades and management? Contact Shane McDermott, smcdermott@thoracic.org, 212-315-8650.