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2019 COI Reviewer Instructions

For Chairs of Conference CME Sessions and Chapter and Other ATS CME. A different review process is used for ATS guidelines.

Please read this and use as a resource while reviewing.

Deadline for 2019 Conference Reviews: April 30.

Deadlines for late additions & Chapter CME arranged individually.

Why ATS Requires Chairs to Review Presenters' Potential Conflicts of Interest

The Accreditation Council on Continuing Medical Education requires that ATS (1) obtain from all presenters, chairs and planners of CME activities (including International Conference sessions) disclosures of all financial relationships with commercial interests relevant to subject matter and (2) determine (review) and manage (resolve) any conflicts of interest (COI) prior to the event, to ensure that the CME presented is balanced and free of commercial bias. The ATS needs you, as the expert in control of your session, to assess the potential conflicts reported by your presenters, and ensure that anything relevant to your session is managed appropriately.

For 2019: Automated Review Process – Simpler and Quicker – Only Requires 8 or 9 Clicks

I. Log-in to the New ATS COI Website

- A. **Go to the log-in page at <https://thoracic.coiriskmanager.com>. Enter ATS-issued COI Username** (sent to you by email). Currently site security requires different usernames and passwords than those used for other ATS websites. We apologize for the inconvenience.
- B. **Enter your Password** (that you set at your first use of the site, to disclose) and **click Login**. If you've misplaced Username or need to re-set Password, click "*Forgot ...*" and enter the email address at which ATS reached you. For help, click "Need Help" on the log-in page to see ATS help memo and contacts.
- C. **First complete your own 2019 disclosure form if you haven't**. (Disclosures to ATS in the past, or by Journal manuscript-specific ICMJE forms, do not meet accreditor requirements for 2019 activities.). On the site Home page click the 2019 form listing in "forms to be completed" and follow instructions. Once there are no "forms needed to complete

II. Go to "Review Disclosure" to Use the New Automated ATS Reviewer "Tour"

- A. Once logged in, **you must click "Review Disclosure" in the menu on the left side of your screen**. Important: you must enter the Review Disclosure section to use the new automated ATS Reviewer Tour to complete your reviews. Other sections of the website have tours that aren't specific to ATS use.
- B. **Next, you must click on "Tour" in upper right of your screen**. The Reviewer Tour **navigates the process for you - for most steps you only click "next" - with on-screen instructions throughout**.
 - Steps involved:
 - Steps 1 and 2 - Search and Review: **the Tour automatically locates forms needing your review. Do not fill out search fields, especially; do not under "Status" mark as "reviewed."**
 - **The next person in line for you to review will be highlighted**. (Do not review yourself if listed. Handle as instructed.) **Only panelists reporting conflicts will be listed**. You do not need to review those reporting no conflicts. **If none listed**: either no conflicts require your review or panelists have not yet filed. Here after ATS will e-mail when reviews are needed.
 - **Review the person's form. Scroll up and down to read it completely. Judge the conflicts reported and the extent to which they could cause doubt about whether the content is free of bias**. Later you will assign a single grade (ATS management option) to assure accreditors and audiences that appropriate steps were taken.

- Steps 3, 4 and 5 require only a click each to automatically “Create a Case” for “Case Management.”
 - The system automatically prepares a “new disclosure level case” (case file) for use in filing your assessment of this person's conflicts.
- Step 6 is “Management Plan”: You must click on “Select a Template” when shown, and in the drop down menu click on the one grade (ATS management option) that you think is appropriate. Then take note of the specific steps to take with this person.

Step 7: Click as instructed to file (“publish”) your review of this person. Then if done reviewing, log-out at upper right of screen.

III. To Review Another Person (another presenter/panelist of yours)

- Whether you’ve just returned to the site (logged in) or just completed a review, to review another person use the same automatic Tour steps noted above.
 - **Remember: You must be in the “Review Disclosure” section to use the automated ATS Tour** and review. (Click on “Review Disclosure” in the menu on left of screen, if needed.) Other parts of the website have tours that aren’t specific to ATS use.
 - **Only then click “Tour”** (upper right corner of screen) and take the steps noted above.

2019 ATS COI Grades (Management Options) for the Conference and Other CME

Also provided in the “Management Plan” within the ATS Tour. Reviewer [Chair] selects one option and manages accordingly. Remember: you must first click “Select a Template” where instructed, and then click the grade/option you think appropriate.

Option 1 - No relevant conflicts (COI)

Standard ATS COI management to be conducted, including: the person's disclosure of relevant COI is reported to learners (audience) by the ATS or person directly according to ATS accreditor specifications; the content is free of commercial bias; the Chair monitors the presentation on-site and informs and clarifies for the audience if any content seemed to reflect commercial bias.

Option 2 - Past COI or ending by event

Resolved through standard ATS COI management noted above.

Option 3 - Current COI - require best evidence

The existence of the relevant COI is resolved by the Chair's ensuring that the presentation reflects the best available evidence. (Done in addition to standard management.)

Option 4 - Current COI - peer review the content

The existence of the relevant COI is resolved by the Chair arranging peer review of content by the Chair or other expert who is free of conflicts relevant to the subject matter. (Done in addition to standard management.)

Option 5 - Current COI - make no recommendations

The existence of the relevant COI is resolved by the Chair's ensuring that the person makes no clinical recommendations relevant to the business interests of the company or intellectual property involved, or that of a competing company or intellectual property. The Chair contacts the person in advance of the activity to arrange. (Done in addition to standard management.)

Option 6 - Industry employee - ATS approval needed

The Chair must contact ATS in advance to obtain consideration and approval of an industry employee serving as a planner or presenter in an accredited continuing medical education (CME) activity, as is required to ensure compliance with Accreditation Council for Continuing Medical Education (ACCME) policies.

Option 7 - May need other resolution

The reviewer has concluded that either (a) the other ATS-prescribed COI management options seem inadequate to resolve the existence of the relevant COI, in a manner that assures audience that the conflicts haven't caused commercial bias affecting content, or (b) the reviewer wishes to propose another method of resolution.

**Technical issues? Email ethicsoffice@thoracic.org or call John Harmon at 212-315-8611.
Policy questions? Email ethicsoffice@thoracic.org or call Shane McDermott at 212-315-8650.**