

Overview

Thank you for participating as a faculty member of an AAOS CME course. As faculty, you play a pivotal role in delivering education to our members. Your contribution and willingness to share your knowledge is greatly appreciated.

This handbook will serve as a resource to you throughout the course planning. During that time, you will receive periodic emails with additional information relating directly to your participation.

The AAOS CME Content Committees are attempting to steer away from the conventional methods of didactic teaching, and instead, place a greater emphasis upon engaging the learner in the educational process. As faculty for an AAOS CME course, we must rely upon you to successfully implement these new, more effective, educational practices into the CME courses.

The AAOS' ultimate goal is to better meet the educational needs of those individuals attending our courses. Through course evaluations, we understand that registrants appreciate the change in focus to problem-based, interactive learning.

We know the time you take to review the enclosed guidelines will be well-spent, and a good investment. Thank you for your continued support of the AAOS educational programs.

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CME Course General Information and Policies

The mission of the American Academy of Orthopaedic Surgeons (AAOS) is to serve our profession to provide the highest quality musculoskeletal care. This is achieved through education of Orthopaedists, providers of health care and the public, promotion of research, communication with other professionals and the public, and leadership in the development of health care policy.

As a course faculty member, you will share your information and knowledge with orthopaedists and other medical professionals. This interaction that takes place at the CME courses is one of the most valuable aspects of the course.

Faculty Information

As a faculty member, you will be asked to:

- Complete the appropriate course forms, including your current disclosures.
- Submit your PowerPoint presentation on or before the due date.
- Arrive at the course in ample time to give your presentation to the audiovisual staff for loading.
- For skills courses, attend the entire course as your participation is required in each lab session.
- For virtual or webinar courses, attend the faculty rehearsal prior to the course, and sign into the course platform at the time requested by the Course Specialist.

Required Forms

The AAOS requires all faculty to complete and submit the following forms for any course the participate in:

- FDA form – Instructors are required to disclose the FDA status of all instruments, implants and devices discussed in the course. This information is included in the final program.
- Non-Exclusive Perpetual License form – This allows the Academy to record the course and provide course handouts to registrants. In the event the session you are participating in is webcast or videotaped for distribution, the license gives the Academy permission to record and distribute your presentation in any format. It does not mean the Academy owns your presentation; you retain your copyrights and the presentation.
- Consent and Release form – This gives the Academy permission to record your name, likeness, picture, photograph, portrait, voice or image in all forms and media and in all manners, (collectively “the Recorded Image”).
- Liability Waiver – This form is only required for skills courses, and waives liability against AAOS for any damage, injury or disease arising from participation at the course. Signing this form also mandates that all individuals wear provided protective equipment.

Disclosure

As an accredited provider of AMA PRA Category 1 CME credit™, AAOS is required to obtain financial disclosure of any potential conflicts of interest from presenting faculty members at a CME course. The Academy maintains its own disclosure program, and all faculty must disclose in the AAOS program within two years of the date of the course. Faculty disclosure is conveyed to the course registrants in various ways which may include publication in the final program schedule, the AAOS website, learn.aaos.org and the course syllabus. Disclosure in general session rooms will consist of one of two visuals; one that indicates that the presenter (and their co-authors) have something to disclose and a second indicating the presenter (and their co-authors) have nothing to disclose. If you need to update or search for disclosures, you may do so by going to www.aaos.org/disclosure.

Financial interests include:

- Research or institutional support
- Miscellaneous non-income or in-kind support (e.g., equipment or services), commercially derived honoraria, or other non-research related funding (e.g., paid travel)
- Royalties
- Stock or stock options
- Consultant or employee

Commercialism/Bias Policy

The AAOS CME courses are developed to ensure that the educational content is presented in a FAIR AND BALANCED manner. The Academy policy prohibits commercial promotion and sponsorship by faculty or industry within a CME course. This policy has been interpreted to prohibit faculty from promoting their or another's practice or product during the course of the lecture or in handout materials.

- All faculty are encouraged to use generic terminology, whenever possible, in presenting orthopaedic content and avoid favoritism toward a specific company or products in lectures, discussions or handout materials.
- Manufacturers, exhibitors and other commercial enterprises are prohibited from sponsoring or providing handouts. In addition, the name of a manufacturer and/or exhibitor should not appear on any page or product used as a handout except when used for scientific or comparative purposes in the text of the handout materials or on the speaker's slide.
- The educational presentation and handout materials may not promote a particular practice, clinic, hospital, institution, publication, or commercial enterprise.

Presentation Requirements and Guidelines

When developing an outline for the lecture, determine what three things you want the registrants to learn.

- Establish a theme
- Build a case to support the theme
- Each point must address the theme
- Pull it all together

Conclude the lecture by telling them what you told them. An effective summary includes three elements – summarizing key ideas, developing an integrated framework and using ending strategies. Remember: A good lecture is a dialogue between you and everyone else in the room.

PowerPoint Presentation

- Create slides and visuals that support your thoughts on a topic. Use photo illustration whenever possible.
- Backgrounds should never compete with content.
- Constrain the amount of text on each slide. Don't "read" your slides.
- Your slides can be either 4:3 or 16:9 widescreen aspect ratio.
- Slides will be saved as PDFs and made available to registrants as "Handouts."
- Registrants should be able to follow the lecture from the handout.
- Copyrighted material cannot be reproduced in part or whole as a handout without a release. Copyrighted material includes articles, book or journal chapters, graphs and pictures.
- Charts or x-rays which bear the name of an institution, hospital or clinic are also copyrighted. This also includes animated figures, cartoon strips and may include proper names such as, "Disney".

Pre-recorded Video

- Videos of surgical techniques almost always enhance a presentation because they stimulate and engage the learner. Learners can imagine themselves doing what they see on the screen more easily than those things they only hear about.
- If you are asked to pre-record a lecture to be used as pre-course content, you will receive detailed recording instructions from your Course Specialist with a specialized link to record your video online.
- Avoid mentioning specific dates in your videos. This will make it possible to re-use the videos for future courses if your presentation does not change year to year.
- The camera should see what the surgeon sees, from the surgeon's point of view and from the surgeon's side of the table. Make sure the camera can see the tips of your instrumentation.
- If a phone is used to record video, decide before the surgery if you are going to hold the camera landscape or vertical. Landscape is recommended.

- Your camera should be supported with a tripod, jib or motion stabilizer/gimbal so the video is stable.
- Edit out the review material and extraneous footage in advance. During live presentations, don't waste the audience's time with fast forwarding, or searching for material.
- Please don't use distracting music, introductory credits, fancy graphics or special effects. Don't use pre-recorded – narrate the material from the podium. Use notes if necessary. Practice beforehand, describing the procedure aloud with the video.
- List of Preferred Media (Video/Audio) Formats: (.wmv) (.mp4) (h.264) (.mov) Please try to keep the video files size to less than 750MB if possible. Small video segments can be embedded on multiple slides.

Peer Review

To ensure that AAOS course content is relevant and free of bias and commercialism, all course materials, including the course schedule, course objectives, handouts, and pre-recorded lectures are submitted for peer review. This process can be time consuming, especially for courses with a large amount of content. Therefore, it is extremely important that all content be submitted in a timely manner.

Moderator's Guidelines for Managing Conflict of Interest

As a moderator for an Academy CME Course, you play a vital role in helping manage potential conflicts of interest, bias, and/or commercialism expressed during a lecture, live and/or videotaped demonstration, or lab introduction.

Following are recommendations to manage potential conflicts interest:

Commercialism

When a company name is clearly identified in a presentation and the presenter does not verbally comment that they have an interest in that company, please announce the faculty member's documentation of the potential conflict noted in the syllabus.

Moderators are responsible for "keeping the balance". When one company's product is mentioned, after the presentation, you should note other products filling the same requirements, if one or more exists.

Bias

If a faculty member expresses a preference for a specific procedure (bias) or product (commercialism and bias), and the program outline does not include presentations on alternate procedures, as the moderator you are asked to comment on other procedures or products to provide balance.

Intellectual Property and Copyright Information

As a faculty member preparing presentation material, please review and adhere to the following information regarding copyright and use of all published and unpublished images, derived from articles, book chapters, etc.

The AAOS respects the copyrights held by others. As a result, if it is known that an image, medical illustration, video, or other rendering has been published in another work and is held in copyright, AAOS requests that you cite the course of where you obtained the material. AAOS can include images from the following sources without consideration for copyright but a citation is still needed:

- Journal of the American Academy of Orthopaedic Surgeons (JAAOS)
- Any AAOS publication, video, examination or multimedia program
- Your patient files (radiographs, MRI, CT, and other imaging studies) with consideration for HIPAA regulations.

Hands-on Surgical Skills Lab Information

Each faculty will be assigned to a station. Faculty may need to rotate stations during the course to ensure attendees receive an opportunity to engage with more than one faculty. A rotation schedule will be in the information packet you receive when you arrive. Please be prompt in getting to your assigned station.

Gowns, gloves, face shields and shoe covers are mandatory in the lab at all times. AAOS will provide these for you. If you have a latex allergy, please let us know and we will provide non-latex gloves. Save your gown for the entire day and your face shield for the entire course.

Remind the participants at your table to do the same. There are scrubs available in the closet immediately before you enter the lab. A locker will be assigned to you when you checked in.

It may not always be possible to assign you to a station with equipment that you are familiar with. If this happens, teach the procedure and if you need help with equipment, rely on the company rep. Company support is crucial to the success of the hands-on labs. Take a few minutes to talk with the participants at your station. Determine what they want to accomplish. Monitor activity so that one participant is not monopolizing the cadaver.

If there is a problem at your station or you need additional supplies, a company rep, etc., please ask one of our lab assistants.

Registration

As a faculty member, your registration is free of charge. Faculty members are preregistered for any of the CME courses that you participate in. After the course, the Course Specialist will update your transcript and email you with details on how to claim your CME Credits.

Travel and Hotel Information

Hotel reservations will be made for you by the Course Specialist. Your room and tax for your hotel room will be put to the Academy's Master Account at the hotel. You will be responsible for covering any incidentals you charge to your room. After the course, you will be able to submit for reimbursement for incidental expenses according to the AAOS reimbursement policy.

Faculty will be required to use the Academy's travel agency, CorpTrav/Frosch for airline tickets. **The Academy will no longer be reimbursing tickets purchased independently and submitted on expense reports.**

Adhering to this policy is important for several reasons:

- Safety of our travelers. In today's climate it is critical that the Academy is aware and informed of where our volunteers are so that we can assist them if necessary. If there is any disturbance in your travel schedule, CorpTrav/Frosch will be able to help you get to your destination or find alternative options 24/7.
- Minimizing the steps for reimbursement. You will no longer need to submit documentation for tickets and wait for your expenses to be approved and reimbursement processed.
- No out of pocket costs. You will not be required to pay anything upfront for your ticket. The billing will come directly to the Academy.
- Earn miles. You will still be able to earn airline miles on all tickets.
- Cost containment and budgeting. CorpTrav/Frosch is well-versed in the Academy's travel policy. They will be able to help you make travel decisions within the Academy's guidelines. They also provide the Academy with timely reports, ticket averages and cost- comparisons giving us a true picture of costs on a timely basis. This is also critical to helping us budget effectively in the future.

Airline tickets can be booked online through the [CorpTrav/Frosch website](#) or by phone at 1-800-318-3846. Be sure to use the appropriate 8-digit budget code for your travel. The budget code for making your air travel will be provided to you by the Course Specialist. If you don't have a CorpTrav/Frosch profile, you will need to create an account with a user ID and password.

Travel Reimbursement Information

Reimbursed Items

Air Travel

- Non-refundable standard Coach class tickets booked at least 21-days in advance. If the cost exceeds \$600, you will need to contact your course specialist for authorization prior to ticketing.
- Flight changes up to \$200 per round trip.
- Use of a private airplane is strongly discouraged due to liability issues.
- Baggage fees up to a maximum of two bags.
- International (Non-North America) faculty can travel Business Class. If needed, one day of travel before/after the course is also reimbursable.
- Upgrade purchases are not reimbursable, including upgrades to Economy Plus.

Non-Air Transportation

- Taxi or shuttle transportation to and from airports.
- Personal automobile travel at the current published US Government IRS rate per mile. If a personal vehicle is used in lieu of airline travel, mileage reimbursement may not exceed the cost of the commercial 21-day non-refundable standard Coach airfare.
- Rental car expense if prior approval received from course specialist. Information on ancillary expense coverage will be provided with approval.
- Parking Costs

Lodging/Meals

- Lodging at the Academy's group rate for a standard room during your participation at the course (includes night before through night of last presentation, as required for travel arrangements). Any suite upgrades or additional rooms are the responsibility of the faculty.
- Meals (maximum of \$125 per day.)

Usual and Customary Miscellaneous Expenses:

- Telephone calls up to \$25 per day.
- Internet service based on hotel's standard charges.
- In-room movie (1 per day) or use of hotel fitness center.

Customary gratuities for baggage handling, taxis, maid service, meals, etc.

Receipts

Original detailed receipts are required for each travel expense item that is \$25 or more, but the traveler is encouraged to obtain receipts for all expenses. As required under IRS guidelines, receipts should be itemized (for example, a restaurant receipt should show individual food and/or beverage items). Names of attendees must also be listed.

Non-reimbursed Items

- Non-refundable standard Coach class tickets purchased less than 21-days prior to the course without prior authorization. Reimbursement limited to 21-day rate.
- Airline upgrade certificates or purchases (for example: Economy Plus Coach, Main Cabin Extra, Business or First).
- Airline baggage overweight fees.
- Meals taken in lieu of Academy-provided or sponsored meals.
- Add-on travel expenses including, but not limited to additional nights and suite upgrades.
- Expenses incurred by or for faculty spouses, family members, or guests.
- Personal items such as faxes, valet services and recreational activities.
- Syllabus or presentation preparation/copying/shipping.
- Rental car expenses not previously approved.
- Gas for personal automobiles as this is included in IRS mileage rate.
- Other personal automobile expenses such as electric charges, car washes, tune ups, etc.

Please also reference the [AAOS Travel Policy](#) for any additional questions.

Contact AAOS

If you have any questions, please contact your Course Specialist, or a member of the AAOS CME Course Team:

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