

## Course Director Checklist – CME Office

|                          | Responsibility  | Time line   |
|--------------------------|---|---|
| <input type="checkbox"/> | Complete a needs assessment                               | <ul style="list-style-type: none"> <li>• <b>6 – 9 months</b> prior to the proposed event a needs assessment to be conducted to determine the professional practice gaps</li> </ul>  |
| <input type="checkbox"/> | Pre-Application and planning committee                    | <ul style="list-style-type: none"> <li>• <b>4 - 6 months</b> prior to the proposed event a planning committee to be developed and pre-application requested.</li> <li>• Disclosure forms from the planning committee members, course director and anyone in a position to control content are due with the pre-application.</li> </ul>  |
| <input type="checkbox"/> | Activity Development Application                          | <ul style="list-style-type: none"> <li>• Submit a completed and signed Activity Development Application <b>4 – 6 months</b> prior to the start of activity.</li> </ul>  |
| <input type="checkbox"/> | Pay service fee   | <ul style="list-style-type: none"> <li>• Upon application approval &amp; before work begins on program.</li> </ul>  |
| <input type="checkbox"/> | Agenda building   | <ul style="list-style-type: none"> <li>• Draft agenda/schedule preparation; submission of agenda not a requirement for activity development application.</li> <li>• Final agenda submission due 1 month prior to event.</li> </ul>  |
| <input type="checkbox"/> | Commercial Support (Grants) and Letter of Agreement (LOA) | <ul style="list-style-type: none"> <li>• Commercial Support is financial or in-kind contributions given by a commercial interest (ineligible company) and used to pay all or part of the costs of a CME activity.</li> <li>• Provide a list of all commercial support grants being pursued.</li> <li>• OCME &amp; Course Dir. acknowledge LOA and CUSOM-Grants &amp; Contracts &amp; Company sign LOA prior to start of activity.</li> </ul>                              |
| <input type="checkbox"/> | Faculty Disclosure Form                                   | <ul style="list-style-type: none"> <li>• Disclosures from all faculty/contributors are due a minimum of 20 days prior to the CME event.</li> <li>• Failure to return a Faculty Disclosure Form is equal to refusing to disclose and may result in disqualification of faculty and reduction of CME hours.</li> <li>• Review list of companies from all Disclosure Forms and identify those with products/services that are related to the CME activity content</li> </ul> |
| <input type="checkbox"/> | Promotional Materials and Marketing                       | <ul style="list-style-type: none"> <li>• Promotional materials must be reviewed and approved by OCME, review Promotion Checklist for specific details.</li> <li>• Exhibits/Marketing info must be separate from the CME</li> <li>• No LOGOs/slogans on CME content/pages</li> <li>• Explicit permission is required to share participant information with commercial supporters/exhibitors</li> </ul>   |
| <input type="checkbox"/> | Content Validation Form                                   | <ul style="list-style-type: none"> <li>• Prior to start of course, review education material (e.g., slides or handouts) for content and commercial bias, ensuring they do not contain advertising, trade names or product messages.</li> </ul>  |
| <input type="checkbox"/> | Final Documents   | <ul style="list-style-type: none"> <li>• Submit Income &amp; Expense Statement and Final Attendee list 60 days after event.</li> </ul>  |