

**Course Director Checklist – CME Office**

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|  |  | **Responsibility** |  | **Timeline** |

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|  |  | Complete a needs assessment |  | * **6 – 9 months** prior to the proposed event a needs assessment should be conducted to determine professional practice gaps
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|  |  | Pre-Application and planning committee |  | * Submit preapplication **5 - 6 months** prior to the event
* Disclosure forms from the planning committee members, course director and anyone in a position to control content are due with the preapplication.
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|  |  | Activity Development Application |  | * Submit Activity Development Application **4 – 6 months** in advance
* Submit draft agenda with application
* Discuss planned activity with Associate Dean of CME
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|  |  |   Pay service fee |  | * Due upon application approval & before work begins on event
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|  |  | Agenda building |  | * Final agenda submission due **at least 1 month** prior to event
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|  |  | Commercial Support (Grants) and Letter of Agreement (LOA) |  | * Commercial support = 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
* Provide a list of all commercial support grants being pursued.
* OCME & Course Dir. acknowledge LOA, and CUSOM-Grants & Contracts & Company sign LOA prior to start of activity
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|  |  | Faculty Disclosure Form |  | * Submit **ASAP**. Disclosures from all faculty/contributors are due a **minimum of 20 days** prior to the CME event.
* Failure to submit a disclosure form is equivalent to refusing to disclose and may result in disqualification of faculty and reduction of CME hours
* Review list of companies from all disclosure forms and identify those with products/services that are related to the CME content; please contact OCME if conflicts
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|  |  | Promotional Materials and Marketing |  | * Promotional materials must be reviewed and approved by OCME; review promotion checklist for details
* Exhibits/marketing info must be physically separated from the CME activity
* **No logos/slogans/pharmaceutical name brands**
* Explicit permission is required to share participant information with commercial supporters/exhibitors
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|  |  | Content Validation Form |  | * Collect educational material ASAP (e.g.slides or handouts) **at least 1 month** prior to course
* Review all materials for content bias and commercial bias, ensuring they do not contain advertising, trade names or product messages
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|   |  |  Evaluation/CME Credit |  | * Participants, **including course directors and planners**, must complete an evaluation to claim and receive CME credit.
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Final Documents

* Submit Income & Expense Statement and Final Attendee list 60 days after event.