

Initial Paperwork for CME Approval *due in June of each year	Completed
<ul style="list-style-type: none"> - Completed <u>Disclosure & Verification form from each planner</u> *must be submitted <u>prior to the beginning of any planning</u> - RSS Application 	
Required Paperwork for Each Activity	Completed
<u>Disclosure & Verification Form</u> (completed by every Speaker <u>and</u> Planner) <ul style="list-style-type: none"> - Each speaker and planner must complete this form disclosing all financial relationships with any ineligible company in the last 24 months. The form must be completed even if there are no conflicts of interest. (The information on this form will be used to complete the Disclosure to Attendees form.) - You may utilize either the paper or electronic version of the form 	
<u>Peer Review</u> (if applicable) <ul style="list-style-type: none"> - If a speaker lists a conflict of interest on their Disclosure & Verification form, a Peer Review will need to be completed by the Physician Planner before the speaker's presentation 	
<u>Disclosure to Attendees</u> (there are multiple ways to disclose to the attendees) <ul style="list-style-type: none"> - Disclosure to Attendees Form (provided by the CME Office) <ul style="list-style-type: none"> o Display at the sign-in/check-in table, posted on website, or provided in an email/Zoom invite - Verbal Disclosure – each speaker verbally discloses to the audience before their individual presentations (an attestation will need to be provided to CME Office) - Disclosure on first slide of PowerPoint presentation or at the beginning of a virtual platform (i.e., Zoom) <p style="text-align: center;">**Disclosure must be provided even if there is nothing to disclose**</p> 	
<u>Advertising Guidelines</u> (required for all CME advertising) <ul style="list-style-type: none"> - The Accreditation & Disclosure Statements must be included in all advertising mentioning CME. Please copy and paste these statements as the wording must remain <u>exact</u> (NOTE: <i>AMA PRA Category 1 Credit(s)TM</i> must remain italicized and TM must remain superscripted) - All advertising must be sent to the CME Office for approval prior to distribution/publishing - Please keep copies of advertising - NOTE: Please send monthly list of speakers/topics to CME Office for inclusion on CME Webpage 	
<u>Exhibitor Agreement</u> (if applicable) <ul style="list-style-type: none"> - Contact the CME office if there will be exhibits/exhibitors at your activity 	
<u>Letter of Commercial Support-Grant Agreement</u> (if applicable) <ul style="list-style-type: none"> - Contact CME office if your activity will be receiving commercial support/grant funding 	
<u>Attendance Record</u> (required for every activity) <ul style="list-style-type: none"> - All attendees must be tracked for each activity - Examples include sign-in in sheets, check list of attendees, badge scanner, Zoom chat, etc. - NOTE: You may use any preferred method to track attendance. 	
<u>Attendance Tracking</u> (completed on a yearly basis) <ul style="list-style-type: none"> - Utilize the Excel spreadsheet to keep track of the total number of activities, total hours, and total number of physician and non-physician attendees - Please indicate which attendees are physicians and non-physicians 	
Post Activity Paperwork	Completed
<u>Evaluation Form</u> <ul style="list-style-type: none"> - Include the date, title of presentation, speaker name(s) and learning objectives - This should be distributed to the attendees, collected and summarized. Please keep copies of the summaries. - You may use paper or electronic evaluations 	
<u>CME Certificate</u> <ul style="list-style-type: none"> - Physician certificate - Non-physician certificate - May be issued weekly, monthly, quarterly, bi-annually or annually 	
Final Paperwork *due in June of each year	Completed
<ul style="list-style-type: none"> - Activity Development Worksheet - Data demonstration of change in learners and/or findings as indicated on the Activity Development Worksheet 	

Note: Records will be reviewed by the CME Office annually and must be kept for a period of six years