



CME JOINT-PROVIDER (JP) ACTIVITY CHECKLIST

PRIOR TO THE ACTIVITY

- INTAKE FORM:** (JP) Complete and return Intake Form to the ISMA **prior** to the planning of the activity.

- PLANNING COMMITTEE DISCLOSURES:** (JP) The activity Planning Committee must complete & return to the ISMA their Disclosure of Financial Relationship Forms, along with Intake Form, **prior to the first planning meeting.**

- PRE-APPROVAL EMAIL:** If approved, **ISMA** will send you via email a Preliminary Approval, the Joint Providership Fee Schedule, an extensive CME Application and Planning Worksheet, and a Joint Providership Agreement for signature by an authorized company representative.

NOTE: To be in compliance with ISMA's policy, the Planning Committee meeting minutes **MUST** reflect the Chair of the Committee *directing all members who have indicated a potential conflict of interest will be recused from any discussion where there is a potential for the stated conflict to influence the content of the program.*

- ISMA JOINT PROVIDERSHIP AGREEMENT:** (JP) Sign and return to ISMA the Joint Providership Agreement. A fully executed copy must be on file before proceeding.
- SUBMIT CME APPLICATION & PLANNING WORKSHEET:** (JP) Complete and submit the ISMA CME Application & Planning Worksheet no less than **3 months prior** to the activity.

Supporting documentation **required** at time of submission:

- Documentation that supports the practice gaps identified
 - Global program learning objectives
 - Initial planning meeting minutes
 - Projected budget for the activity
 - Preliminary program agenda listing all educational sessions, breaks and meals (including purported faculty, if known)
 - Submit all application documentation via email to cstearley@ismanet.org
- APPLICATION REVIEW BY ISMA:** **ISMA** reviews the final CME Application & Planning Worksheet and provides feedback. **Upon ISMA approval, current forms and templates will be emailed to you.** ISMA forms and templates sent in the approval email **MUST** be used; there may have been updates made to the forms since a previous activity.

- ❑ **DISCLOSURE FORMS: (JP)** Send Disclosure of Financial Relationship Forms and Content Validity Forms to all speakers and moderators for completion. For all potential Conflicts of Interest (COI) identified, a designated ISMA official must manage the disclosure and complete the ISMA COI Resolution Form.

- ❑ **APPROVAL OF MARKETING MATERIALS: (JP)** Furnish ISMA with a copy of all print and electronic marketing materials for review & approval **2 weeks prior** to publishing/distributing.
 - ❑ All materials, including save-the-dates, brochures, flyers, website announcements, etc., must meet ISMA Marketing Guidelines and Requirements.
 - ❑ Materials should include the following elements:
 - ❑ Program/session learning objectives
 - ❑ CME accreditation, designation and disclosure statements and ISMA logo use in format provided in Marketing Guidelines
 - ❑ Acknowledgement of Educational Grants/Commercial Support (both financial & in-kind contributions)

- ❑ **EDUCATIONAL GRANTS:**
 - ❑ Any commercial support/educational grants sought must be done so with the full knowledge of ISMA. Formal Letters of Agreement (LOA) must be signed by **ALL 3 entities**:
 - ❑ Joint Provider
 - ❑ ISMA as Accredited Provider
 - ❑ Commercial Supporter/Industry Partner

- ❑ **MEETING MATERIALS:**
 - Due 30 days prior to meeting**
 - ❑ **(JP)** Submit completed Disclosure of Financial Relationship Forms and Content Validity Forms to ISMA for all speakers & moderators who are participating in the activity.

NOTE: All potential Conflicts of Interest (COI) disclosed **MUST** be vetted and resolved by ISMA before speakers/ moderators are allowed to present.
 - ❑ **(JP)** Submit program Syllabus to ISMA for review/approval.
 - ❑ **(JP)** Submit all speaker powerpoint presentations to ISMA for review/approval.
 - Due 2 weeks prior to meeting**
 - ❑ **(JP)** Submit handouts to ISMA for review/approval.
 - ❑ **(JP)** Submit adapted Evaluation Form & CME Certificate to ISMA for final approval.
 - ❑ **(JP)** Submit Pre & Post-Test Forms to ISMA for final approval (if applicable).
 - ❑ **ISMA** will generate a Disclosure Grid/Table and send to JP for inclusion in program materials

DURING THE ACTIVITY

- DISCLOSURE INFORMATION: (JP)** Provide the Disclosure Grid in the program syllabus or handout, or you **MUST** show the disclosure information on the 1st slide of the presentation, to be reviewed **prior** to start of the activity.
- ACTIVITY EVALUATION FORMS & PRE/POST TESTS: (JP)** Gather all Activity Evaluation Forms (and Pre/Post-Tests, if applicable).

AFTER THE ACTIVITY

- CME CERTIFICATES: (JP)** Create/distribute CME certificates by email or snail mail. Credit may not be claimed until **after** the learners have participated in the activity.
- (JP)** Send the following **within 2 weeks** of conclusion of the activity:
 - Attendance List
 - Copy of Certificates of Attendance issued
 - Program Evaluation Summary
- (JP)** Send the following **within 30 days** of conclusion of the activity:
 - Pre/Post-Test Summary (if applicable)
 - Final activity budget (reflecting actual revenue & expenses, including commercial support, exhibitor fees, registration fees, etc.)

The Activity File will not be considered closed until final documentation is submitted.

RETAIN FOR 6 YEARS

RETAIN ALL PROGRAM DOCUMENTATION IN YOUR FILES FOR 6 YEARS TO BE AVAILABLE FOR ISMA/ACCME REVIEW:

- Planning Committee meeting minutes
- All Financial Disclosure forms
- Disclosure grid
- Final program syllabus
- All program marketing materials
- Summary of program evaluations (including actual onsite evaluations completed by participants)
- Summary of Pre/Post-Test (including actual tests completed by participants – if applicable)
- Attendance List
- Financial Recap/Final Activity Budget