



CME JOINT-PROVIDER (JP) ACTIVITY GUIDE & 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 **Cheryl Stearley, CME Accreditation & Recognition Administrator, at 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 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 Mitigation 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 to ISMA for all speakers & moderators who are participating in the activity.

NOTE: All potential Conflicts of Interest (COI) disclosed **MUST** be mitigated 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.
- ☐ **PROTECTING LEARNERS: (JP)** The accredited provider must not share the names or contact information of learners with any ineligible company or its agents without the explicit consent of the individual learner(s).
- ☐ **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 learner participation 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