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.

- **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.

RETAIL 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