

State Chapter Joint Providership CME Timeline and Checklist

TIMELINE	ACTIVITY
4-6 Months Prior	<p style="text-align: center;"><u>Preliminary Application & Agreement Form</u></p> <ul style="list-style-type: none"> • Planning Committee Information • Overall Learning Goals • Plans for Commercial Support • Agreement Form • \$200 application fee
4 Months Prior	<p style="text-align: center;"><u>Submit Full Application Form</u></p> <ul style="list-style-type: none"> • Course learning objectives • Target audience • Meeting agenda and instruction methods
3 Months Prior	<p style="text-align: center;"><u>Advance Program & Faculty Disclosures</u></p> <ul style="list-style-type: none"> • Draft of Full Program with Speakers • Speaker List with Emails to Collect Disclosures (ASMBS will collect disclosures and report any conflicts to your organization for resolution or replacement)
2 Months Prior	<p style="text-align: center;"><u>Financial Disclosure Form Review & Conflict Resolution</u></p> <ul style="list-style-type: none"> • ASMBS will request assistance getting any outstanding faculty disclosures • ASMBS will provide report of any conflicts • ASMBS will provide Accreditation statement and joint providership statement after all conflicts resolved • Faculty list
30 Days Prior	<p style="text-align: center;"><u>Commercial Support & Final Speaker Presentations</u></p> <ul style="list-style-type: none"> • All faculty conflicts of interest need to be resolved and any presentations for review need to be requested • All Sponsor LOAs should be collected and submitted to ASMBS • Prepare listing of companies for acknowledgement in program book. DO NOT USE CORPORATE LOGOS.
2 Weeks Prior	<p style="text-align: center;"><u>Disclosure Reports & Signage for Attendees</u></p> <ul style="list-style-type: none"> • Prepare listing of companies for acknowledgement in program book. DO NOT USE CORPORATE LOGOS. • ASMBS will provide Speaker Disclosure Report which MUST be distributed to attendees
7 Days Prior	<p style="text-align: center;"><u>Final Program & Disclosure Preparation</u></p> <ul style="list-style-type: none"> • Accreditation statement listed on Final Program • Plan for speaker disclosure forms to be distributed to attendees finalized • Final signage or plan for disclosure of commercial support
POST MEETING:	<p style="text-align: center;"><u>Final Registration & Budget</u></p> <ul style="list-style-type: none"> • Provide ASMBS with final attendance roster sent via Email (Excel preferred). Must include, first name, last name, credential and email address • Final Program Budget- Include revenue, expenses, commercial support, exhibitor and advertising income, total net revenue/loss, and total expenses of entire CME unit for this program

ASMBS will send attendees a link via email to claim CME approximate 1 week after receiving the final registration list only if all required documentation has been submitted. (ie sponsor LOAs, proof of disclosures etc)