



American Society for Metabolic & Bariatric Surgery

State Chapter Joint Providership CME Timeline and Checklist

State Chapter Name	
Activity Name	
Activity Date & Location	

TIMELINE	ACTIVITY	RESPONSIBILITY OF	DATE COMPLETED
6-12 months prior to the date of the CME activity	Application <ul style="list-style-type: none"> • Submit application by E-mail or fax. Include: <ul style="list-style-type: none"> ○ Disclosures of all Planning Committee members: https://asmbs.org/financial-relationship-disclosure-form ○ State Chapter Credit Application document ○ Draft program agenda ○ Preliminary budget ○ Document initial faculty contact ○ Discuss funding sources/registration fees/develop budget/sign venue ○ \$200 non-refundable application fee 	State Chapter	
Ongoing	Program Planning Correspondence <ul style="list-style-type: none"> • Send copies of all educational program planning materials and correspondence to ASMBS CPD Department 	State Chapter	
4-6 months prior/ as soon as material is in draft	Advance Promotional Materials <ul style="list-style-type: none"> • Receive approval of ALL advance promotional materials from ASMBS CPD Department. Materials must include: <ul style="list-style-type: none"> ○ Course learning objectives ○ Target audience ○ Meeting agenda and instruction methods ○ Accreditation statement and joint providership statement (determined by ASMBS upon receipt) 	State Chapter & ASMBS CPD Dept	

	<ul style="list-style-type: none"> of final meeting agenda) <ul style="list-style-type: none"> o Faculty list 		
2-4 months prior	<p>Disclosures & Conflict of Interest Forms</p> <ul style="list-style-type: none"> • Send faculty disclosure link to all speakers: https://asmbs.org/financial-relationship-disclosure-form o Refusal to resolve conflicts will result in withdrawal of invitation to participate o Ensure all completed disclosures have been submitted to ASMBS including all activity planners and speakers o Complete disclosure report must be included in final program 	State Chapter	
2-4 months prior	<p>Commercial Support Letters of Agreement</p> <ul style="list-style-type: none"> • Send Letters of Agreement (LOA) to commercial supporters for signature. Submit collected LOA to ASMBS. LOA must be signed by both the State Chapter and the commercial supporter • Prepare listing of companies for acknowledgement in program book. DO NOT USE CORPORATE LOGOS. 	State Chapter	
1-2 months prior	<p>Final Program Book</p> <ul style="list-style-type: none"> • Receive approval from the ASMBS prior to printing • Be sure the final program book includes: <ul style="list-style-type: none"> o Learning objectives o Disclosure listing o Accreditation statement o Listing of commercial support 	State Chapter	
2 weeks prior	<p>Collection & Review of Faculty Presentations</p> <ul style="list-style-type: none"> • All faculty PowerPoint presentations, and/or any course materials, must be collected by the State Chapter and reviewed for potential conflict of interest and commercial bias. • After this initial review, then presentations are to be forwarded to the ASMBS CPD Dept with summary notes from the State Chapter President and/or meeting director regarding any potential COI. • ASMBS will work with the presenter and the State Chapter Pres/Director to resolve any COI - Have all presentations, w/ review summary notes, sent to ASMBS CPD Dept 	State Chapter	
1 week prior			
7 business days prior to start of activity	<p>Evaluation Form & CME Certificate Processing</p> <ul style="list-style-type: none"> • Send ASMBS the final registration list: First name, last 	State Chapter & ASMBS CPD Dept	

	<p>name, credentials, address and email address. The following services will be provided by ASMBS for collecting evaluations and providing CME/CE certificates:</p> <ul style="list-style-type: none"> ○ ASMBS will send an email to the attendees with a direct link for them to be able to do the following: <ul style="list-style-type: none"> ▪ complete their evaluation immediately following the conclusion of the activity ▪ claim the appropriate number of credit hours ▪ obtain their CME certificate (can be printed or emailed to them) ○ Integrated health professionals claiming CE credits can obtain an attendance certificate at the time they complete their evaluation; then, about a month post-activity, they will receive an official CE certificate from Taylor College. ○ Any on-site registrations can be sent to ASMBS at the close of registration at the end of each day. Please tell the attendee that it will be 24-48 hours before they will be able to access the evaluation and credit claims site. They will be sent an email when access is available. 		
<p>Within 2 months post-activity</p>	<p>Post-Activity Items</p> <ul style="list-style-type: none"> ● Collect and forward copies of the following to ASMBS: <ul style="list-style-type: none"> ○ Final printed hard-copy of the program book that was distributed at your meeting ○ Any material distributed other than the program book such as E-mail blasts/brochures ○ Final attendance roster sent via E-mail in MS Excel. Include attendee break-down of physician vs. integrated health, etc. ○ Final financial accounting break-down. Include revenue, expenses, commercial support, exhibitor and advertising income, total net revenue/loss, and total expenses of entire CME unit for this program ○ Next year's meeting dates, location, and CME contact person ○ An invoice will be sent to the chapter in the amount of \$200 per CME credit (for example 8CME hours = \$1600) 	<p>State Chapter</p>	