

Course Director Checklist – CME Office

	Responsibility	Time line
<input type="checkbox"/>	Complete a needs assessment	<ul style="list-style-type: none"> 6 – 9 months prior to the proposed event a needs assessment to be conducted to determine the professional practice gaps
<input type="checkbox"/>	Pre-Application and planning committee	<ul style="list-style-type: none"> 4 - 6 months prior to the proposed event a planning committee to be developed and pre-application requested. Disclosure forms from the planning committee members, course director and anyone in a position to control content are due with the pre-application.
<input type="checkbox"/>	Activity Development Application	<ul style="list-style-type: none"> Submit a completed and signed Activity Development Application 4 – 6 months prior to the start of activity.
<input type="checkbox"/>	Pay service fee	<ul style="list-style-type: none"> Upon application approval & before work begins on program.
<input type="checkbox"/>	Agenda building	<ul style="list-style-type: none"> Draft agenda/schedule preparation; submission of agenda not a requirement for activity development application. Final agenda submission due 1 month prior to event.
<input type="checkbox"/>	Commercial Support (Grants) and Letter of Agreement (LOA)	<ul style="list-style-type: none"> Commercial Support is financial or in-kind contributions given by a commercial interest (ineligible company) and used to pay all or part of the costs of a CME activity. Provide a list of all commercial support grants being pursued. OCME & Course Dir. acknowledge LOA and CUSOM-Grants & Contracts & Company sign LOA prior to start of activity.
<input type="checkbox"/>	Faculty Disclosure Form	<ul style="list-style-type: none"> Disclosures from all faculty/contributors are due a minimum of 20 days prior to the CME event. Failure to return a Faculty Disclosure Form is equal to refusing to disclose and may result in disqualification of faculty and reduction of CME hours. Review list of companies from all Disclosure Forms and identify those with products/services that are related to the CME activity content
<input type="checkbox"/>	Promotional Materials and Marketing	<ul style="list-style-type: none"> Promotional materials must be reviewed and approved by OCME, review Promotion Checklist for specific details. Exhibits/Marketing info must be separate from the CME No LOGOs/slogans on CME content/pages Explicit permission is required to share participant information with commercial supporters/exhibitors
<input type="checkbox"/>	Content Validation Form	<ul style="list-style-type: none"> Prior to start of course, review education material (e.g., slides or handouts) for content and commercial bias, ensuring they do not contain advertising, trade names or product messages.
<input type="checkbox"/>	Final Documents	<ul style="list-style-type: none"> Submit Income & Expense Statement and Final Attendee list 60 days after event.