

Deadline Date:	Planning Tasks:	Documentation in CME Activity File
	Confirm planning committee names	List of planning committee names including reviewers
	<p>Meet with planning committee to discuss preliminary ideas for:</p> <ul style="list-style-type: none"> <li>Needs assessment data (expert opinion as per planning minutes; evaluation data; public health a clinical data; pertinent literature from journals, etc.)</li> <li>Identification of the learning gap(s) of your own learners</li> <li>Identification of what you could change and measure in terms of competence (new strategies), or performance, or patient outcomes. How will you evaluate/measure the change?</li> <li>What professional competencies the activity will support, e.g. ACGME competencies</li> <li>Preliminary objectives and topics</li> <li>Possible speakers</li> <li>How activity will be financed</li> <li>Get planner disclosure of relevant financial relationships with commercial interests</li> </ul>	<p>Copies of planning notes and minutes as they become available throughout the entire development process</p> <p>Evidence of identified learning gap. This could be a statement of the gap referring to what is going on with your own learners about a particular problem or new rule/law/guideline. It could also be articles referencing the gap(s) (highlighted, please); or it could be planning minutes; or reports and data</p> <p>Evidence of what you believe you could change in terms of competence (new strategies), performance, or patient outcomes.</p> <p>Signed planner disclosure forms or minutes that discuss results of disclosure from planners</p> <p>Resolution of possible COI, if necessary (What did you do to ensure planner does not let identified financial relationship with commercial interest to influence planning?)</p>
	Contact speakers	Copies of all speaker correspondence (phone call notes, e-mail, etc.)
	Contact potential financial supporters or complete online application for commercial support	<p>Copy of solicitation letter for commercial support or online grant application. Copy of letter of agreement signed by you and commercial supporter prior to activity date.</p> <p>List of all commercial supporters.</p>
	<p>If process calls for approval by CME Committee or other planning committee, submit before any promotional pieces go out.</p> <p>Approval packet might include</p> <ul style="list-style-type: none"> <li>Gap/needs assessment data</li> <li>Final Objectives</li> <li>Agenda</li> <li>Financial support</li> </ul>	Copy of communication to planners and packet
	<p>Confirmation letters to speakers with speaker disclosure form</p> <p>Confirmation letters should contain:</p> <ul style="list-style-type: none"> <li>Objectives, purpose of activity</li> <li>Target audience</li> <li>Information on reimbursement and honoraria</li> </ul>	<p>Copies of confirmation letters or e-mails</p> <p>Signed disclosures</p> <p>Evidence of how disclosed relationships with commercial interest was resolved, if applicable.</p>

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	Determine and confirm exhibitors, if applicable	Copy of communications to exhibitors ensuring they are aware of Standards for Commercial Support, Standard 4, Appropriate Management of Associated Commercial Promotion
	<p>Draft promotional material</p> <ul style="list-style-type: none"> <li>no mention of CME credit pending or TMA as CME sponsor until credit is approved</li> <li><b>After CME approval, include:</b> <ul style="list-style-type: none"> <li>Title of the activity and topics to be presented</li> <li>Specific learning objectives</li> <li>Educational methods to be used</li> <li>Target audience</li> <li>Prerequisites required of participants</li> <li>Names, credentials of faculty</li> <li>The CME accreditation and designation statements</li> <li>Acknowledgement of educational grants or other financial contributions.</li> </ul> </li> </ul>	Copies of all promotional material that include the accreditation statement and credit designation statement (page 5 of TMA accreditation manual)
	Follow up on speaker disclosure forms	Copies of signed disclosures Identify and resolve possible COI, prior to activity
	Design evaluation process. If using participant evaluation form to measure change in competence, include a question about what the participant might change as a result of attending the activity. (It should not be just “yes” or “no”.)	Copy of evaluation summary, or if no evaluation form is used, evidence of how the activity was evaluated, e.g. review of data or follow-up surveys of participants
	Develop procedures for attendance records	List of attendees or evidence that information is kept electronically
	Prepare format for speaker/planner disclosure to audience	Copy of speaker/planner disclosure statement to audience, e.g., in syllabus, or separate written statement, or on slides, or if verbally – signed attestation of what was disclosed
	Prepare format to recognize any commercial supporters not acknowledged on the brochure, e.g., signage	Copy of acknowledgement of CS
	Prepare syllabus/handouts, if applicable	Copy of syllabus/handouts
	Prepare CME Activity Attendance & Evaluation Report	Copy of tabulated/summarized evaluation and attendance roster; or if other evaluation mechanisms are used such as reports, include those in file
	Prepare final budget	Copy of final budget that includes commercial support and exhibit monies