

Howard University College of Medicine  
Office of Continuing Medical Education

**SUMMARY OF STEPS FOR PLANNING EXTERNAL ACTIVITIES**

*Preliminarily, this information is also sent at the beginning of each month to previous program directors.)*

**YOU SHOULD BEGIN PLANNING ONE YEAR IN ADVANCE.**

- Set date: Check possible date conflicts with Office of CME.
- Choose location and reserve in writing.

**THERE ARE FOUR STEPS TO FOLLOW BEFORE THE ACTIVITY CAN BE APPROVED:**

**STEP 1**

**(Part 1 of Application – to be completed by the Planning Committee)**

**A. BEFORE OR DURING THE FIRST PLANNING MEETING (*at least 8 months before the activity*):**

- EACH MEMBER OF THE **PLANNING COMMITTEE** MUST **COMPLETE AND RETURN A DISCLOSURE FORM** (*attached*);
  - **THE PLANNING COMMITTEE MUST COMPLETE PART 1 OF THE APPLICATION AND RETURN WITH COMMITTEE DISCLOSURES AND MINUTES OF MEETINGS HELD TO DATE.**
- If a first-time or returning joint sponsor, *the Activity Director MUST COMPLETE AND RETURN the Education Partner Attestation Form. (Available in the CME Office)*
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**(Part 2 of Application – to be completed by the Activity Director of the Program)**

**B. AT LEAST SIX MONTHS BEFORE THE ACTIVITY:**

1. THE **ACTIVITY DIRECTOR** MUST COMPLETE AND RETURN PART 2 OF THE APPLICATION (*under separate cover*) Tell us about your plans, including, but not limited to:
  - The Gap(s) identified that need to be closed (as the reason for the activity)  
*(Note: the activity must be designed to close a gap in Competence, Performance and/or Patient outcomes*
  - Behavioral Objectives for the Learners
  - Validity of Content
  - Other pertinent information on Part 2 of the Application

**Additional Information – (TO BE REVIEWED AND RETAINED BY THE **ACTIVITY DIRECTOR** and **PLANNING COMMITTEE**) – available upon request.**

- Services and Rate Schedule Options
- Late Planning Fee Schedule and Rates
- ACCME Standards for Commercial Support

**Note:** *You must have completed and sent the two-part Application (Steps 1 & 2)*

**STEP 2 - FIVE MONTHS BEFORE ACTIVITY, THE FOLLOWING ARE DUE:**

- Additional Meeting minutes, if any
- Tentative/Proposed Agenda , with CME General Information and Objectives for the learners, etc.
- Proposed Evaluation Forms
- Correspondence to/from speakers & moderators

Submit proposed agenda to the CME office for review. **(Late fees charged if requirement is not met. Below four months is subject to non-accreditation.)**

- . All copy **must** be reviewed by the Office of CME **before** marketing.
- . Prepare and submit individual statements of the disclosures made by planning committee, speakers and moderators that must be included in the brochure (See administrator for example.)
- . Submit signed **Letter(s) of Agreement** for director's signature
- . Send **administrative fee**

**STEP 3 - FOUR MONTHS BEFORE ACTIVITY (ONE MONTH MINIMUM)**

- Speakers' and Moderators' Disclosures Due
- Guest speakers' slides and Howard speakers who disclose potential conflicts Due
- Syllabus Due for review
- Signed Letters of Agreement (LOAs) from commercial supporters Due for signature

*Have all speakers send slides, abstract or short summary of their topic for the syllabus (syllabus is to be bound and distributed on site.)*

- . Prepare bound syllabus and include disclosures made by committee, speakers, and moderators
- . Have all Letters of Agreements from commercial companies signed and sent to CME office for director's signature

**IF/WHEN THE ACTIVITY HAS BEEN APPROVED BY THE CME OFFICE, YOU MUST FOLLOW THROUGH WITH:**

**STEP 4 - UPON APPROVAL OF THE ACTIVITY BY OFFICE OF CME, THE:**

- **Proposed brochure** is DUE for review (BEFORE it is printed).
- Brochure must include all information from the **General Information Sheet** in Step 3
- Contact Person **MUST meet** with the CME administrative assistant several days before the scheduled activity
- Contact Person **MUST Pick up Records of Attendance** from Office of CME

*All copy must be approved by the Dean's Information Office after approval by CME office.*

**YOU SHOULD MAIL THE BROCHURES AT LEAST THREE MONTHS PRIOR TO ACTIVITY DATE.**

**THERE IS ONE STEP TO FOLLOW DURING THE ACTIVITY**

**STEP 5 - DURING THE ACTIVITY – (ON SITE)**

- Speakers' slides must show their disclosures before presentation
- Moderators should verbally direct audience's attention to all disclosures in the printed materials
- Attendance MUST BE TAKEN by having registrants sign in upon arrival
- After signing in, provide evaluation form to all registrants , and
- Provide the Record of Attendance to registrants who desire credits
- Remind registrants to complete and return evaluations and Records of Attendance
- Collect completed evaluation forms
- Initial and collect the yellow copy of the Records of Attendance. (Return the white copy to registrants.)

**THERE ARE TWO STEPS THAT MUST BE FOLLOWED AFTER THE ACTIVITY**

**STEP 6 - WITHIN THREE WEEKS AFTER THE ACTIVITY, YOU MUST SEND:**

- Copies of all materials mailed/distributed before and during the activity
  - Three copies of the brochure
  - One copy of the syllabus and other educational handouts, etc.
- Alphabetized **Excel or Access** list of names and addresses of **everyone** who attended (Physicians must be identified, Residents and Students, also)
- The original sign-in sheets
- The yellow copies of all Records of Attendance collected
- A Summarized report of audience's evaluation responses
- Final Statement of Income and Expenses
- Certification that audience was notified of disclosures (available from the CME Office)
- Pay Balance of Fees

**STEP 7 - BY NO LATER THAN 6 to 12 WEEKS AFTER ACTIVITY, YOU MUST ASSESS THE IMPACT THE ACTIVITY HAS HAD ON THOSE WHO ATTENDED THROUGH A POST-ASSESSMENT QUESTIONNAIRE AND SEND TO THE CME OFFICE THE SUMMARIZED:**

- Post-assessment report of outcome/impact of activity on physicians' practices (To determine if the gap(s) identified has/have been closed.)