

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.)