



SAINT LOUIS UNIVERSITY CME

Timeline Checklist

9-12 MONTHS IN ADVANCE

Contact the CME office to discuss concept, scheduling, funding and accreditation guidelines

Course development

- Conduct needs assessment/gap analysis
- Develop course objectives, tie them back to your gaps and discuss educational outcomes measurement
- identify target audience
- Select topics and faculty

Contact pharmaceutical and equipment companies regarding funding

Site selection and preliminary arrangements made

6-12 MONTHS IN ADVANCE

Submit applicable Application (AMA only, or CME/CE combined) form with needs assessment data and preliminary agenda for review and approval by the CME office for *AMA PRA Category 1 Credits™*. CME will review and send:

- A Service Agreement based on your course profile and service needs
- Preliminary approval of AMA credits

Prepare financial projection or budget for course

Commercial funding

- Review the Policy for Relationships with Commercial Entities
- Obtain a Letter of Agreement from each contributor well in advance of the course
- Acknowledge funding in the brochure and program handout materials
- Obtain Exhibit Space contract if applicable

Develop marketing plan

- Identify geographic range and specialties to target
- Determine type and number of mailings needed (brochure, postcard, email campaign)
- Establish target mailing dates (at least 90 days for brochure with one mailing)
- Identify sources for mailing lists and place orders
- Place announcements in appropriate journal calendars, web sites, university distributions

4-6 MONTHS IN ADVANCE

Confirm Faculty

- Utilize the faculty invite letter that CME provides
- Agenda, educational objectives and target audience
- Explanation of disclosure policy (including resolution) and request for disclosure form
- Request CV or bio
- Request handout materials
- For AMA only applications
 - Send Disclosure form, validation of content, copyright permission form
- For combined applications
 - Combined Bio/Disclosure form

Brochures and promotional materials

- Review promotional guidelines for specific details



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- Allow 3-4 weeks for typesetting, editorial proofing, printing
- Allow 1 week for mailing house preparation and post office delivery
- Finalize brochure copy, allowing 2 weeks for typesetting and changes
- Submit a draft to CME for review and approval (prior to typesetting)
- Submit typeset piece for final approval by CME
- All materials must be approved by CME in advance to insure compliance
- Send CME 25 copies of printed item(s) for inquiries and distribution

3-4 MONTHS IN ADVANCE

Brochure and postcard mailings scheduled (one distribution typically mailed 60-90 days in advance; two distributions can be done at 6 months and 3 months)

Faculty housing and audiovisual needs requested

30-60 DAYS IN ADVANCE

Disclosure forms, CVs received from faculty and submitted to CME for review

- Contact faculty who have indicated a potential conflict of interest
 - Determine whether a true conflict exists
 - Discuss method for resolution of conflict of interest
 - Document process and how conflict was resolved on COI resolution form
- Prepare faculty disclosure information for handout materials
- Submit disclosure page to CME prior to course for approval

Prepare syllabus/handout materials for distribution. Use copy write permission form from each faculty getting permission to make copies or download presentation for participants use.

Letters of agreement and exhibit contracts from commercial organizations received and sent to the CME office for review, approval, and the authorized signature.

Evaluation form set up and submitted to CME office for review (see example form), to evaluate:

- Each speaker's presentation and content
- To what extent the educational objectives were met
- Self assessment questions
- Presence of commercial bias
- Outcome measures, will you collect at the end of the activity and again in 3-6 months. Will you ask the learner for a change of practice and will you want them to report on their changes

POST-PROGRAM (WITHIN 30 DAYS):

Submit a typewritten, alphabetized listing of all meeting participants

- Indicate credits earned by participants
- Include name, degree, position, mailing address, specialty area, date of birth, email address

Summarization of evaluations from the program submitted to CME office

A copy of the complete syllabus or handout materials submitted to CME office

Preliminary financial summary (including itemization of commercial support and tuition received as well as expenses and honoraria) prepared and submitted to CME with copies of original receipts/invoices

*This checklist is intended for the department or organization handling logistical aspects of a meeting directly with the CME Department providing basic accreditation services. In the event CME provides logistical services, a similar timeframe applies and logistical aspects become the responsibility of the CME Program.