Check List of Required Forms & Procedures for CME Activities
Sponsored by the Carver College of Medicine

I. Prior to the Educational Activity, all applicants must provide to the CME Division:

- Completed CME Application. Please request a copy of our Application Guide if you need assistance filling out the Application. Submission of an Application does not ensure approval. Remember that program planners cannot receive guidance, either nuanced or direct, from commercial supporters on the content of the activity or who delivers that content.

- A draft of the Brochure or Announcement for the program. For programs seeking CME credit, no announcements may be sent out without prior approval from the CME Division. (Template available upon request.)

- Commercial Support is financial, or in-kind, contributions given by a commercial interest, which is used to pay all or part of the costs of a CME activity. (Excluding advertising or exhibit fees.) It is to be used to underwrite some of the program expenses. Commercial support requires a Letter of Agreement that has to be filled out and signed PRIOR TO THE COURSE by the company representative and either the course director or the CME Compliance Coordinator. All such grants must be disclosed to attendees prior to delivery of the program. For questions or assistance with all matters relating to commercial support and exhibit fees, please contact Teri Thomann in the CME office at 319/353-3023 or teresa-thomann@uiowa.edu.

- Display and exhibit fees. Exhibits and displays do not require a Letter of Agreement. However, grants and exhibit fees must be disclosed to the audience prior to beginning to the program. (Names of companies, not amounts.) Disclosure may take place verbally, in a slide, or in a handout provided to attendees when they register. (A template of the handout is available from the CME office.) Additionally, exhibit fees and grants must be included in your financial summary.

- Evaluation Form or process. You must have an evaluation form or process for every educational activity. Request a template from the CME office or submit your own for our review. A question must be included on the evaluation form asking attendees whether they detected any bias in the activity.

- Signed Joint Sponsorship Agreement (If applicable – only for jointly sponsored programs). Request this form from the CME Division prior to the program.

Please direct questions, comments, and inquiries to:

CME Division/The University of Iowa Carver College of Medicine/100 CMAB/
Iowa City, IA 52242. 319/335-8599 (voice) 319/335-8327 (fax) http://www.medicine.uiowa.edu/cme/ (web)
Disclosure of Relevant Financial Relationships. All speakers, course directors, and planning group members must disclose well in advance of the educational event. These are the steps involved in disclosures:

1. If the discloser is a UI employee, obtain their disclosure from the UI disclosure database. Call 5-8599 to request access to our disclosure database.

2. If the discloser is a non-UI employee, request a copy of our hard copy disclosure form which can be filled out electronically and returned by email or fax.

3. As you obtain or receive each disclosure, it must be reviewed for potential conflict of interest. (Reviews are typically managed by the Course Director.) For guidance on performing conflict of interest reviews, contact the CME office at 319/335-8599 and request a copy of the document, Completing Conflict of Interest Reviews.

4. Any conflicts must be resolved, or the person cannot participate in the program. (Conflict resolution is typically managed by the course director.)

5. For UI employees who wish to receive training on reviewing and resolving conflicts of interest, please contact the CME office at 5-8597 and someone will be assigned to you for training. There is also a 10-minute training video available at this link.

6. ANYONE WHO DOES NOT DISCLOSE PRIOR TO THE EVENT OR WHOSE CONFLICTS CANNOT BE RESOLVED MAY NOT PARTICIPATE IN A UNIVERSITY OF IOWA- PROVIDED CME ACTIVITY UNDER ANY CIRCUMSTANCES.

7. Please send all disclosures and completed conflict of interest reviews to the staff person you are working with in the CME Division.

CME Fees and Charges. Please be sure to talk to CME staff to discuss the accreditation fee and certificate charges for your meeting.

II. DURING the Educational Activity:

Faculty disclosures must be made known to the audience before each presentation. This may be done by verbal disclosure, a presentation slide, or a handout included in the syllabus and given to attendees before the program begins.

All commercial supporters providing grants or in-kind support must be disclosed to the audience.

III. FOLLOWING the Educational Activity (within two weeks):

Provide a typed list (alphabetized by last name) of all attendees including those who are not requesting a credit letter from the CME office. We need full names, academic degrees (MD, DO, PA, ARNP, etc.), complete address, phone number, and email address. If not all of your attendees are requesting credit, please clearly indicate on the list which people DO wish to receive a credit or participation letter from our office.

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Iowa City, IA 52242. 319/335-8599 (voice) 319/335-8327 (fax) http://www.medicine.uiowa.edu/cme/ (web)
Include a **summary of responses** to the evaluation questionnaires. We don’t want individual evaluations, only a summary.

**Disclosure Review and Verification.** The course director must sign this form, confirming that 1) he/she reviewed faculty financial disclosures prior to the activity and resolved any conflicts of interest; 2) that all disclosures were made directly to the audience; and 3) the program was in compliance with UI’s honorarium policy. (Copy available upon request.)

**Category 1 Change Forms** completed by physicians who did not participate in the full program. Be sure to include these with the packet you send to UI CME.

**A Financial Summary** that lists the total dollar amount of your expenses and an itemized list of your revenues for the CME program. (Financial Summary template available upon request.) The financial summary can be submitted in the text of an email.