

# Category 1 CME Activity Planners' Checklist for a Live Activity

Pennsylvania Medical Society's (PAMED) CME department is committed to guiding our CME customers through the pre and post CME planning process and expediting the review/approval of a CME application as quickly as possible. The following tasks and timelines are designed to ensure that our CME customers have time and steps in place to determine the educational needs, identify acceptable faculty, develop appropriate content, promote the CME activity to intended audiences, and deliver education that is evidenced-based, non-promotional, and relevant to physicians/health care teams.

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## Planning Process Tasks and Timeline

### Before Any Planning Conversations Occur

All proposed planning team members must complete online disclosure forms **before** the first planning meeting. Activity planner/meeting manager will receive a copy of all completed disclosure forms and should note any additional actions requested from the CME office. [Go to Disclosure Form](#)

### 4 to 6 Months Prior to the Activity Date

Submit an intent to apply for Category 1 credit to the PAMED CME office at **as soon as possible**. [Go to intent form](#).

Complete the session description table specific to educational needs of the activity (Practice gap – what is the problem in practice and why is it occurring; outcomes – what do you want to change with the activity.).

Prepare a program agenda, referencing session title(s), times and intended faculty if known.

Complete the planner/speaker table which will need to accompany the CME application.

Complete an online CME application and attach the agenda, session description table and the planner/speaker table. [Go to CME application](#).

► **Please allow up to 15 business days for the initial application review/approval.**

Submit sponsor/exhibitor letter/agreement marketing materials to the [CME office](#) prior to sending out to vendors/sponsors.

### 3 to 4 Months Before the Activity

Send link to the online disclosure form to all faculty as soon as possible. Online disclosures are received directly by the CME office, who will notify you of disclosures received. [Go to Disclosure Form](#)

► **Faculty disclosures are due 6 weeks prior to the activity to allow time to address potential conflicts of interest.**

Submit promotional materials to the [CME office](#) for approval **before** printing or distribution – *marketing materials that reference CME credit cannot be distributed until after the CME credit is approved*. If the activity is being promoted on the web, the online brochure must also be reviewed and approved.

All promotional materials other than a “save-the-date” piece should include:

- the PAMED accreditation and designation statements
- appropriate acknowledgment of commercial support, if applicable

▶ **Allow 3 business days for review and approval**

## 1 to 2 Months Before the Activity

Contact the CME office to discuss the CME evaluation process.

Review faculty disclosure correspondence from the CME office – assess if there are any conflicts of interest that still need to be resolved.

Confirm applicable letter(s) of agreement for educational grants are executed as soon as possible.

▶ **All letters of agreement must be executed no later than one week prior to the event.**

## 3 to 4 Weeks Before the Activity

Submit faculty presentation materials/slides to the [CME office](#) for review.

- We are happy to review the materials/slides as soon as you receive them – no need to wait until you receive everything.

▶ **Allow 5 business days for review**

Submit onsite program materials to the [CME office](#) for approval before printing, distribution or posting online. Onsite material should include:

PAMED accreditation and designation statements.

Disclosure statement referencing any relevant financial relationships of planners and faculty, including wording to reflect that all relevant financial relationships, if applicable, have been mitigated. Otherwise include a statement that no relevant financial relationships exist.

Appropriate acknowledgment of commercial support, if any.

▶ **Allow 3 business days for review and approval.**

## 1 to 2 Weeks Before the Activity

Connect with the [CME office](#) to finalize any outstanding items.

## Post Activity Tasks

Send an attendance list to the [CME office](#) within **3 days of the activity**.

Complete the financial reporting form and submit it to the [CME office](#) within **30 days of the activity**.