

PLANNER'S CHECKLIST For Live CME Activities

Course Title:	
Course Date(s):	

Task to be Done	People Responsible	✓ Completed
Conduct gap analysis	Activity Director	
Planning Committee meeting to:		
 Complete Activity Planning Form 	Activity Director,	
 Sign Letter of Agreement for Educational Activity Management and CME Credit 	Planning Committee Member,	
 Obtain signed Disclosure Statements from planning committee 	CME Project Manager	
Set schedule and choose presenters		
Establish budget		
Send completed planning form to CME Office for approval and certification	Activity Director	
	Activity Director,	
Reserve facility and sign contract	CME Project Manager,	
	Planning Committee Member	
Contact and confirm speakers	Activity Director,	
	Planning Committee Member	
Send speaker confirmation letters	CME Project Manager	
Collect CV's and signed disclosure statements from presenter(s)	CME Project Manager	
Review signed disclosure statements for affiliations with industry	CME Project Manager	
Seek educational grants if requested*, Joint Provider Agreement Form for Commercial Support	CME Project Manager,	
	Activity Director	
	Activity Director,	
Send letters of solicitation to potential exhibitors	CME Project Manager,	
	Planning Committee Member	
	Activity Director,	
Develop mailing list	CME Project Manager,	
	Planning Committee Member	
Create dueft modulating materials	Activity Director,	
Create draft marketing materials	CME Project Manager, Planning Committee Member	
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Revise marketing materials and send for printing and distribution	Activity Director, CME Project Manager,	
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Obtain PowerPoint presentations from presenters	CME Project Manager	
For speakers with disclosures, review presentation slides and resolve conflicts	CME Project Manager	
- Compension with another control presentation street and reserve comment	Activity Director,	
Order food and beverages	CME Project Manager,	
order rood and severages	Planning Committee Member	
Create syllabus, evaluation, and credit request forms; make copies	CME Project Manager	
· · · · · · · · · · · · · · · · · · ·	Activity Director,	
Develop registration spreadsheet and enter registrant information	CME Project Manager,	
· -	Planning Committee Member	
Create sign-in sheets and name badges	CME Project Manager	
Print and distribute certificates (conferences)	CME Project Manager	
Summarize participants' completed evaluation forms	CME Project Manager	
Activity close-out form	CME Project Manager	
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Office of Continuing Medical Education

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	Analyst or Business Assistant
Conduct follow-up survey of participants to investigate application to practice	CME Project Manager
Most to urea up activity	CME Project Manager,
Meet to wrap up activity	Activity Director
Other tasks not listed:	
	Activity Director,
	CME Project Manager,
	Planning Committee Member
	Activity Director,
	CME Project Manager,
	Planning Committee Member
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	Planning Committee Member
	Activity Director,
	CME Project Manager, Planning Committee Member
	Figuring Committee Member