



Joint Providership Letter of Agreement

CME Activity Title: «Title»
Activity Type: «Type»
Origination Date of Activity: «Date»
Term: 2 years from origination date
Name of Accredited Provider: Southern Medical Association
Name of Joint Provider: «JP_Name»
Date: «LOA_Date»

As an accredited provider of continuing medical education (CME) activities, the **Southern Medical Association** (hereinafter known as “**SMA**”) agrees to enter into a joint providership agreement with the non-accredited organization, «**JP_Name**» (hereinafter known as “«**JP_Acronym**»”), to present the activity entitled, “«**Title**».”

This "Joint Providership Agreement" will define the parameters of the cooperative relationship by delineating the roles and responsibilities of each party. The SMA and «**JP_Acronym**» agree to the terms and conditions described below.

Role of SMA (Accredited Provider)

As the accredited provider of the CME activity, the SMA will take all actions necessary to ensure compliance with the Essentials for Accreditation and ACCME Standards for Commercial Support of Continuing Medical Education. Any action not explicitly outlined below, but deemed necessary by the SMA to comply with these requirements, will be implemented.

Role of «JP_Acronym» (Non-accredited Provider)

Listed below are specific expectations of «**JP_Acronym**» as related to compliance, documentation, and awarding of CME credits. «**JP_Acronym**» is responsible for these requirements on or before the due dates listed, as well as for logistical arrangements that are non-accreditation related. SMA reserves the right to revoke accreditation if appropriate documentation is not provided prior to the start date of the activity. Late fees may be assessed for documentation submitted past the due dates provided. Additional information related to these tasks is included within this document for your reference.

ROLE	SMA	«JP_Acronym»
Review, approve, and document activity content/information provided to all attendees/learners		
Provide samples, templates, and appropriate wording to meet ACCME requirements (disclosure forms, accreditation statements, etc.)		
Maintain CME credit records as required by ACCME for 6 years		
² Manage Grant Support and Exhibits		
³ Manage Disclosure Process		
⁴ Manage Content Review and Resolution of Conflicts of Interest		
⁵ Mange activity evaluation and participation attestation for attendees		
⁵ Manage post-test (test writing, grading, etc.) for enduring materials		
⁵ Award <i>AMA PRA Category 1 Credits™</i> /certificates to physician learners; Provide certificates of participation to non-physicians		
⁸ Provide the course in an online platform, including all required language related to CME accreditation		

Required Documentation Checklist	Due Date
¹ Submit promotional materials (e.g., email blasts, brochures, website screenshots, etc.) showing the approved accreditation statement as provided to learners (.pdf)	ASAP – before print or before launch on website
² Submit signed Letters of Agreement (LOA) with companies providing grant support (monetary or in-kind), if applicable	N/A – no commercial support received for this activity
² Submit documentation of how commercial support will be disclosed to the learners prior to the activity (e.g., handout or page in final program/syllabus)	N/A
³ Submit signed disclosure forms for all individuals involved in the planning and/or presenting the educational content	4 weeks prior to start date
³ Submit documentation of how disclosure of relevant financial relationships will be disclosed to the learners prior to the activity (e.g., .pdf of webpage)	1 week prior to start date
⁴ Submit documentation of how conflicts of interest were resolved	3 weeks prior to start date
⁵ Submit samples of: online evaluation, attendance attestation, CME certificates, and test passing standards (i.e., screenshots of website) for review	2 weeks prior to start date
⁶ Submit roster of learners and earned credits, along with passing scores and evaluation summaries	Every 3 months throughout duration of activity
⁷ Submit financial report, detailing all revenue and expenses, including dissemination of commercial support, associated with the activity (if commercial support is confirmed)	N/A
⁸ Provide a link and login to SMA for review/approval of entire course on LMS; provide screenshots of required elements	1 week prior to start date

¹ACCREDITATION STATEMENTS/PROMOTIONAL MATERIALS

- The content of all brochures, promotional materials, and website must be reviewed and approved by the SMA prior to distribution/launch. The SMA must be listed on all materials as the Accredited Provider. No materials pertaining to the CME activity should be distributed without the review of all parties and the consent of the SMA.
- All continuing medical education activity announcements, promotional materials, on-site handouts, websites, or anywhere that CME Credit is referenced, must include the **stated activity objectives AND the following language**. Note that the statements **must be printed as below, including italics and trademark**:

ACCREDITATION

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of Southern Medical Association and «JP_Name» The Southern Medical Association is accredited by the ACCME to provide continuing medical education for physicians.

CONTINUING EDUCATION CREDIT - PHYSICIANS

Southern Medical Association designates this Live activity for a maximum of «M__of_Credits» *AMA PRA Category 1 Credits™*. Physicians should claim only the credit commensurate with the extent of their participation in this activity.

CERTIFICATE OF ATTENDANCE – NON-PHYSICIANS

All non-physician participants will receive a certificate of participation.

May be helpful to your learners to include:

ATTENDEE REQUIREMENTS

At the conclusion of participating in this activity, learners are entitled to a certificate of credit. Successful completion of this activity is determined by participating in the activity, submission of the evaluation and participation verification statements, and [list other requirements such as passing the post-test].

²COMMERCIAL SUPPORT (If Applicable)

The SMA strictly adheres to the ACCME Standards for Commercial Support. «JP_Acronym» must inform commercial supporters – if applicable - of the following:

- All financial support for the activity must be in the form of educational grants.
- Commercial supporters may **NOT** be involved in the planning, presentation, or evaluation of the activity.
- The SMA must be apprised of all educational grants and the way in which they have been disseminated.
- When there is commercial support, there must be a written agreement that:
 - Itemizes how the commercial support will be used in the development and presentation of the CME activity;
 - Itemizes the organizations involved in the activity (e.g., joint providers, education partners, managers);
 - Specifies the organizational name of the commercial interest(s) that supplied the funds;
 - Specifies what funds or in-kind services will be given by the commercial supporter to support the provider's activity; and
 - Signed by the commercial interest, «JP_Acronym», and the SMA.
- **«JP_Acronym» is responsible for making sure the SMA reviews, approves, and signs the grant agreement(s) prior to the activity.**
- Commercial support will be disclosed to learners in printed announcements and materials prior to the beginning of the educational activity. When commercial support is "in-kind" the nature of the support must be disclosed to learners. Disclosure must never include the use of a corporate logo, trade name, or a product-group message of an ACCME-defined commercial interest.
- No commercial promotional materials will be displayed on the webpage(s) where the CME content is presented.
- Representatives of commercial supporters may attend the CME activity, but may not engage in sales activities while in the room where the activity takes place.
- The content of slides and reference materials is the responsibility of faculty and must not demonstrate bias to a trademark product. Company logos are not allowed on slides, or in the meeting room. In keeping with the SMA's policy of content validation and adherence to the current ACCME Standards for Commercial Support of CME, it is our practice to **document that the content of presentations is peer-reviewed prior to each activity to ensure balance and unbiased content, and that all conflicts are resolved.** The SMA may require «JP_Acronym» to submit an electronic version of each speaker's presentation/abstract *on or prior to an agreed upon deadline.*
- Commercial supporters may not require that they be involved in the preparation of educational materials as a condition of their financial support.
- «JP_Acronym» is responsible for reconciliation, if requested, with Commercial Supporters following the execution of the CME activity. **SMA must receive a copy.**

³DISCLOSURE OF RELEVANT FINANCIAL RELATIONSHIPS/OFF LABEL USES/CONTENT VALIDATION

The SMA requires all individuals in a position to control the content of the educational activity including faculty speakers, planners and content developers, reviewers and others to disclose to SMA relevant financial relationships with commercial interests, relevant to the content. The ACCME defines 'relevant' financial relationships as financial relationships in any amount occurring within the past 12 months that creates a conflict of interest. **Individuals who refuse to disclose relevant financial relationships will be disqualified from participation in the CME activity.**

All disclosure information must be **provided to learners prior to the beginning of the activity**, to include the following information: the name of the individual; the name of the commercial interest(s); and the nature of the relationship the person has with each commercial interest. For an individual with no relevant financial relationship(s) the learners must be informed that no relevant financial relationship(s) exist. **Documentation of how disclosure is displayed to the learner must be provided to the SMA prior to the activity.**

Faculty/speakers/authors are also required to disclose if a product being addressed is not labeled for the use under discussion, and is requested at the time of disclosure. Compliance that this disclosure has taken place must be documented. ***This information must be disseminated to all activity participants.***

Content Validation:

1. All the recommendations involving clinical medicine in a CME activity must be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients.
2. All scientific research referred to, reported, or used in CME in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection and analysis.
3. Activities that promote recommendations, treatment, or manners of practicing medicine that are not within the definition of CME, or known to have risks or dangers that outweigh the benefits or known to be ineffective in the treatment of patients, cannot be an accredited activity. An organization whose activity is devoted to advocacy of unscientific modalities of diagnosis or therapy is not eligible for CME credit.
4. The content of slides/reference materials/webpages is the responsibility of faculty/authors and must not demonstrate bias to a trademark product. Company logos are not allowed on slides, in the meeting room, or on webpages displaying the educational content.

⁴CONFLICT OF INTEREST RESOLUTION

All conflicts of interest must be resolved **prior to the activity**. Depending on the person's role, there are various methods to resolve conflicts of interest. SMA will provide resources and forms for your use in resolving these conflicts. The resolutions must be kept on-file with SMA and must be submitted prior to the established deadline.

⁵EVALUATION/ATTENDANCE ATTESTATION/CME CERTIFICATES

- All educational activities must be formally evaluated by attendees following the activity. A copy of the evaluation summary of responses, completed by the learner(s), must be provided to SMA by the deadline provided.
- Attendees must "attest" attendance/completion of the activity before credit is awarded.
- CME certificates must include specific language related to identity - Physician or non-physician

SMA must review samples of these methods prior to distribution to attendees. Templates are available for your use in preparing this material.

This activity may be selected for a follow-up outcomes survey. If selected, SMA will conduct this survey in cooperation with «JP_Acronym», 4 to 5 months following the activity.

⁶ATTENDANCE DOCUMENTATION

Every three months, «JP_Acronym» will submit via email to SMA a participation attendance roster, to include **ALL** participants, whether or not they were issued a CME certificate. Submit an Excel spreadsheet with the following fields:

- First Name - REQUIRED
- Last Name - REQUIRED
- Designation (MD, DO, NP, etc.) - REQUIRED
- Full Mailing Address - REQUIRED
- Email Address – REQUIRED
- Phone - REQUIRED
- Organization – Optional
- Number of credits claimed/awarded
- Documentation of date post-test was taken/passing standard achieved
- Summary of evaluations

7FINANCIAL MANAGEMENT (If Applicable)

If commercial support is confirmed, «JP_Acronym» will agree, at the conclusion of the activity, to complete and submit an **Activity Financial report**, detailing all revenue and expenses, including dissemination of commercial support, associated with the activity. This information is kept on file to meet ACCME requirements.

8REQUIRED ELEMENTS TO INCLUDE IN THE LEARNING MANAGEMENT SYSTEM (LMS)

The following is an example layout of elements which should be displayed in the LMS to the learner **before** they begin the activity. **Webpage Example:**

GOALS AND OBJECTIVES

[insert the goals and learning objectives of the course here]

COURSE INFORMATION

CME release date: [insert date]

Valid for credit through: [insert expiration date]

Course type: Internet Activity Enduring Material

Estimated time of completion: [insert number of estimated hours to complete the course]

ACCREDITATION

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CONTINUING EDUCATION CREDIT - PHYSICIANS

Southern Medical Association designates this Live activity for a maximum of «M__of_Credits» *AMA PRA Category 1 Credits*[™]. Physicians should claim only the credit commensurate with the extent of their participation in this activity.

CERTIFICATE OF ATTENDANCE – NON-PHYSICIANS

All non-physician participants will receive a certificate of participation.

INSTRUCTIONS FOR PARTICIPATION AND CREDIT

This activity is designed to be completed within the time designated; learners should claim only those credits that reflect the time actually spent in the activity.

To successfully earn credit, participants must complete the activity online during the valid credit period noted, following these steps:

*Read the goals and objectives, accreditation information, and author disclosures.

*Login to access the materials to study the educational content and references.

*Online, choose the best answer to each test question. To receive a certificate, you must receive a passing score of ___%

*Complete the activity evaluation and attestation.

*Upon successful completion of the test, evaluation and attestation, your certificate will be processed and emailed. Credits will be archived for 6 years.

DISCLOSURE OF RELEVANT FINANCIAL RELATIONSHIPS

As an organization accredited by the ACCME, Southern Medical Association requires everyone who is in a position to control the content of an education activity to disclose all relevant financial relationships with any commercial interest. The ACCME defines "relevant financial relationships" as financial relationships in any amount, occurring within the past 12 months, including financial relationships of a spouse or life partner that could create a conflict of interest.

The following individuals, unless otherwise noted, have no relevant financial relationships to disclose.

[INSERT LIST OF ALL PLANNERS, BOARD MEMBERS, AUTHORS, OR ANYONE WHO WAS INVOLVED IN THE CONTENT]. Include their disclosures, if they have any.

OTHER INFORMATION AS REQUESTED

SMA will audit your file upon completion of the activity, and may request additional documentation. At that time, «JP_Acronym» agrees to forward any other outstanding materials related to design and implementation of the activity to establish permanent documentation.

INDEMNIFICATION

Each Party shall indemnify and hold harmless the other Party and its officers, directors, employees and agents, from all third-party claims, demands, liabilities or expense (including reasonable attorney’s fees), arising from breach of any duty set forth herein or from any third party’s use of this activity.

FINANCIAL TERMS

- SMA does not accept any financial liability for this activity.
- The non-refundable Joint Providership fee due to SMA is «Fee».

CANCELLATION

This agreement may be cancelled by either party with thirty days’ notice by providing a written notification to the other party.

CONFIRMATION

To indicate acceptance of this agreement, please sign where indicated below and return to SMA no later than «Date_to_Return_LOA». The undersigned individuals represent and warrant that they have authority to enter into this Agreement on behalf of the organization represented and hereby agree to the terms set forth in this Agreement.

Agreed and Accepted By:

For: «JP_Name» («JP_Acronym»)

Name: _____

Signature: _____ Date: _____

For: **Southern Medical Association (SMA)**

Randall E. Glick, BSB/PM, MCP, Executive Director

Signature: _____ Date: _____