



Southern Medical Association

Joint Provider Activity Planning Guide

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Forward

Southern Medical Association is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide AMA PRA Category 1 Credit(s)™.

The ability to offer physician credit to learners increases the value of an educational activity. Joint Providership allows the non-accredited organization to receive the benefits of accreditation without taking on the burden or costs of maintaining their own accreditation. Take advantage of the opportunity to collaborate with an accredited organization to enhance the diversity and value of your educational offerings.

In seeking a joint providership relationship with SMA, each applicant will fully understand the obligation they are undertaking. SMA will endeavor to continue to provide joint providership of CME with its components and others by providing guidance and resources to ensure compliance with ACCME requirements and SMA policies.

Apply today and take advantage of our full automated system, making it quick and easy.

<https://www.accme.org/accreditation-rules/policies/joint-providership>



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Building a CME Activity

A Joint Provider is required to provide the following to SMA when applying for credit;

- Identify the needs/what educational gap do they plan on addressing
- Determine the education objectives
- Select how the education will be presented (live, enduring, virtual, etc.)
- Select the individuals/organizations that will be in a position to control content
- Selection of educational methods (didactic, blended, role-playing, case studies, etc.)
- Selection of the evaluation of the activity (self-assessment, test taking, etc.)
- Selection of how the activity is to be funded (registration fees, exhibitor fees, commercial support, grants, in-kind gifts, etc.)

The Education Planning Process

Needs Assessment - The activity should answer the following questions ***“Why is this educational activity/conference needed at this time?”***

- Is something lacking in this area? Has something recently changed?
- What change(s) are intended to make with this educational activity/conference?

What type of format is intended to use?

Didactic Lecture (Presenter speaks about a topic and allows discussion)

Case Studies (A case is presented and audience is encouraged to discuss)

Skill Set (A case is presented and audience is encouraged to demonstrate)

Panel Discussion (2-3 individuals with 1 moderator) discuss a topic/allow for Q&A

What to remember when planning?

- Prevent Bias , self- promotion, financial interest from planning or implementation of activity.
- Think of the “needs” first and only then should the selection of the speaker be determined - not the other way around (non-compliance item would be “Dr. Gonzalez would be the perfect speaker to present on his specialty, so let’s add that topic to the conference).

Who plans an activity and what is needed?

- A planning committee must consist of a chairperson and a minimum of 2 other individuals.
- A peer-review committee must consist of a minimum 2 individuals with the qualifications to review the presentations and subject matter.
- Anyone involved in the planning and implementation of the activity must disclose any financial relationships (an employee of a ineligible company, stock, etc.)



- Minutes of any planning meetings must be taken and filed.
- Commercial supporters cannot be involved in the planning or implementation of the activity.
- Prepare the Budget
 - Expenses
 - Venue Cost
 - Food Cost
 - Honoraria
 - Printing
 - Others
 - How are expenses being paid for
 - Registration fees
 - Exhibitor fees
 - Commercial Support
 - In-Kind Gifts
 - Educational Grants
 - Established CME Fund
 - Other

The Implementation of the Planning Thoughts

1. Agenda should include
 - a. Topics
 - b. Timeline (dates and times)
 - c. Location(s)
 - d. Speakers (name, degree and organization they are associated with)
2. List all of the individuals involved with the planning and implementation of content.
 - a. Planners (name, degree(s) and title/organization)
 - b. Speakers (name, degree(s) and title/organization)
 - c. Administrators
3. Learning Objectives of the conference
4. Target Audience
5. Speakers - clinically based information
 - a. Their learning objectives for their presentations
 - b. Presentation Slides
 - i. References - where did they get their data/information
6. What funding will be included in order to facilitate the education?
 - a. From registration fees
 - b. From sponsors
 - c. From commercial support
 - d. From exhibitor fees



- e. From the organization's educational budget

What items do I need to remember to do and have in place prior to the activity?

Announcement of Activity - physicians will identify the education as being accredited only when they see the accreditation statement. This statement will be provided by SMA once the education has been approved.

Ability for learners to register for the activity - learners must be made aware of the cost for registering, how to register and what will be included. This can be advertised on the website, etc.

What will I need the day of the activity?

BEFORE Activity Starts

Registration Desk - where do learners, faculty and exhibitors check in?

Orientation

- Badges
- Swag Bags
- Sign-in Sheet
- Questions/Answers
- Extra Registration forms
- Extra Badges
- Extra Badge holders
- Lanyards if used

Exhibitor(s) Orientation

Welcome Packet

- Comply w/space requirements (not on the way or in the education space)
- No logos on non-educational items

Signage

- Sponsors may be listed - in alphabetical order, no logos

Faculty Orientation

- Schedule
- Presentations

Moderators Orientation

- Schedule

Learners Orientation

- Schedule



DURING Activity Starts

Welcome/Introduction from a Moderator or the organization's representative

Start off the conference with the opportunity for questions from the audience

Faculty

Presenters must be ready to present and comply with -

Disclosures

Approved Slides/Handouts

Allow time for discussion from the audience

Start and finish on time

Break areas are ready - during educational breaks

Food/Beverages

Tables

Staff

[Speakers](#) need to be provided with a **Letter of Agreement**. The following items are strongly suggested. The Joint Provider may also include information and/or items they feel are pertinent to their activity and organization.

AGREEMENT SAMPLE

Conference Title:

Conference Location:

Conference Dates:

Title of Presentation:

Participation Information

The educational session(s) have been approved for continuing medical education credit, therefore the participant agrees to-

- provide their activity design which consists of their needs assessment, objectives and references.
- disclosure of any financial relationships within the past 24 months

An email with the link to providing the above information will be sent to the speaker under separate cover, upon signing this agreement.

Presentation Slides

The speaker agrees to submit their outline and/or slide presentations for peer review no later than 90 days prior to their presentation.



Compensation Information

Flight Arrangements/Ground Transportation: Travel to and from the meeting is at your discretion. (Joint Provider) will reimburse you up to \$_____ with receipts. Travel can be air, rental car, or personal vehicle. Mileage will be reimbursed at the current Federal Mileage Rate up to the \$_____ allowance.

Room Reservations: The Speaker is responsible for reserving their own accommodations by contacting the following _____. Reimbursement will include up to _____ **room night**. The cutoff for the block of rooms is (Date/Time) If calling to make the reservations, the Speaker will identify themselves as participants in the _____.

Expenses: (Joint Provider) will reimburse for other related expenses for _____ days, up to \$_____ each day. An "Expense Reimbursement Form" will be sent to you post conference. The Speaker agrees to provide detailed receipts for items \$25 or more per IRS regulations. (Joint Provider) is prohibited by IRS regulations to pay any expenses incurred for a spouse or guest traveling with the Speaker. The Speaker agrees not to receive payment from any other source for speaking at the conference.

Registration Fee: The conference registration fee is waived and (Joint Provider) welcomes the Speaker to participate and receive CME. Discount code will be provided upon request. The Speaker may participate in the conference meals/beverages made available. Social functions are separate and not included, however, the Speaker may modify his/her registration for these events in order to participate.

Honoraria Fee: \$_____ paid post-conference upon receipt of completed expense form and W-9, or if this section is crossed-off, the Speaker has agreed to waive their honorarium.

Southern Medical Association (SMA) (Accrediting AMA Category 1-A Provider)

The Speaker agrees to be recorded and highlighted on Southern Medical Association's social media platforms, website and other published materials. The Speaker agrees to allow their recorded participation in SMA's educational content and shared with future learners.