



# CME Process Checklist

All steps must be completed through the ACS CME Process Platform  
[facs.org/education/cme-platform](https://facs.org/education/cme-platform)

## PLANNING THE ACTIVITY (CME ACTIVITY FORM STEP IN CME PROCESS PLATFORM)

- Submit the CME Activity Form through the *CME Process Platform* prior to the start of the planning of your educational activity. This step can be completed at any time, as far in advance as possible, before the planning of your activity begins. You will receive an e-mail from [CPDA@facs.org](mailto:CPDA@facs.org) after a review of your submission, detailing the next steps.
- Planning Disclosure Forms must be completed (signed and dated) by all individuals involved in the planning of your educational activity before the planning process begins (referred to as the “Planning Committee” throughout the rest of the Checklist). Note: The Disclosure Form template is linked at the bottom of the CME Activity Form in the *Platform*.
- Document the planning process (minutes/narrative) that illustrates how and when scientific content was developed, topics and speakers were selected, etc.
- Submit any preliminary mailings, call for abstracts, exhibitor letters/prospectus in the Platform for approval prior to distribution.

## 90 DAYS PRIOR TO THE ACTIVITY (CME APPLICATION STEP IN CME PROCESS PLATFORM)

- Submit the following via the *CME Process Platform*:
  - CME Credit Application
  - Planning documentation (minutes, narrative)
  - Disclosure Forms signed by the Planning Committee
  - Post-test (Optional: only if applying for Self-Assessment Credit)

**Note:** Once the Application has been reviewed, you will receive feedback via e-mail from [CPDA@facs.org](mailto:CPDA@facs.org) about required edits to approve the activity for CME credit. After all edits are complete, you will receive an approval e-mail from [CPDA@facs.org](mailto:CPDA@facs.org), including the number of credits approved, fee and payment information (if applicable), customized documents for your activity, including required branding, CME/Completion Certificates, and directions for the next steps for the CME process.



## AFTER CME APPROVAL (PRE-ACTIVITY STEP IN THE CME PROCESS PLATFORM)

- Send Disclosure Forms to all faculty (speakers/moderators/presenters/discussants/authors).
- Review all Disclosure Forms for any noted conflicts of interest (COIs).
- Designated official (MD/DO) must complete management portion of the Disclosure Form if potential conflicts of interest exist.
- Compile Excel Disclosure Summary, indicating all speakers/moderators/presenters/discussants/authors names, roles, and disclosures.
- Create program materials (program book, presentation slides, syllabus, article proof, landing page of website, if Internet-based activity) that include all components found in the Program Requirements document that was included in your CME approval e-mail.
- Complete Letters of Agreement (LOAs) if receiving educational grants (monetary or in-kind commercial support).
- Print evaluation forms or program electronic system to collect evaluation and credit claiming information from learners.
- Through the *CME Process Platform*, submit the following at least **five days prior to your activity** for CPDA approval prior to finalizing:
  - Program draft (program book, presentation slides, syllabus, article proof, landing page of website, if Internet-based activity, etc.) that include:
    - Objectives
    - Accreditation Statement
    - AMA Credit Statement (and Self-Assessment, Regulatory Mandated Credit Statement, if applicable)
    - Disclosure list or disclosure policy paragraph (if including the list in the program is not possible due to space)
  - Disclosure summary
  - Disclosure list insert (if the list was not included in the program due to space concerns)
  - Signed Letters of Agreement (LOAs) if receiving educational grants (monetary or in-kind commercial support)
  - Evaluation/credit claiming system testing credentials, if utilizing an electronic system to collect evaluation and credit claiming information from learners

**Note:** Once the pre-activity items have been reviewed, you will receive feedback via e-mail from [CPDA@facs.org](mailto:CPDA@facs.org) about required edits. After all edits are complete, you will receive an e-mail stating that the requirements needed before the activity begins have been met.

## AFTER ACTIVITY (ATTENDANCE AND FINAL REPORT STEPS IN THE CME PROCESS PLATFORM)

- Submit attendance list through the *CME Process Platform* using the Excel template linked on the Attendance step. Deadline: **30 days after for live meetings, Internet live, RSS, test-item writing, and AMA "Other" formats. Monthly submissions required for Internet enduring, journal formats, and manuscript review until the activity expires.**
  - Include credits earned by referencing evaluation forms completed by learners (and include SA & RM credits, if applicable)
  - Note for ACS activities only: If you are utilizing Ethos for your educational activity, this step is not required, since attendance automatically transfers to Members' MyCME pages after a learner completes the evaluation
- Electronically distribute Post-Activity Survey to all learners (via e-blast or survey tool), two months after their participation in the CME activity, to measure change in competence, performance, or patient outcomes over time as a result of the educational activity.
- Submit Final Report through the *CME Process Platform*. Deadline: **4 months after for live meetings, Internet live, RSS, test-item writing, and AMA "Other" formats. Annual basis (on January 31 of the following year) for Internet enduring, journals, and manuscript review formats, until the activity expires.**
  - Three samples of the following:
    - Evaluation forms
    - Post-activity surveys
  - Summary of all comments from:
    - Evaluation forms
    - Post-activity surveys

**Note:** Once the post-activity items have been reviewed, you will receive feedback via e-mail from [CPDA@facs.org](mailto:CPDA@facs.org) about required edits. After all edits are complete, you will receive an e-mail stating that the attendance has been processed, the Final Report has been closed, and an update about the status of the CME file.

Please contact [CPDA@facs.org](mailto:CPDA@facs.org) with any questions. Thank you!