

8 EASY STEPS TO CERTIFICATION OF CME ACTIVITIES

Step 1 – Contact the Duke Office of CME (DOCME) prior to planning

- The Client (Activity Medical Director or their designee) contacts DOCME to plan an educational activity for *AMA PRA Category 1 Credit™*.
- If desired, Client meets with DOCME to discuss requirements for AMA PRA Category 1 certified activities.

Step 2 – Client provides DOCME with list of potential planning committee members and faculty (speakers, presenters, authors, etc).

- The list should include the following for each person: First and Last Name, Degree(s), Affiliation, Title, Telephone/Fax, Email. (*The purpose of this list is for DOCME to determine completion of CME Disclosure forms, which must done prior to syllabus approval.*)
- a. **Client reviews applicable CME/CE Policies and Procedures located at <http://cme.mc.duke.edu/Forms.htm>**
 - Independence & Disclosure
 - Joint/Co-sponsorship
 - Faculty Honoraria & Travel Reimbursement
 - CE Administrator (ACPE approved activities only)
 - Internet
 - Pharmacy CE Program (ACPE activities only)

Step 3 – Client submits a completed Certification Request Form (CRF).

- CRF's should be sent to DOCME three months prior to the date of the activity.
- DOCME reviews CRF to ensure completion within five business days.

Step 4 – DOCME generates a compliance and fee agreement for the Client's review and signature.

- This document describes the services provided by DOCME and the client as well as associated fees for CME/CE Credit and transcripts.

Step 5 – Client completes, signs, and returns the compliance and fee agreement to DOCME.

- Client receives a formal approval letter approximately 3 business days following receipt.
- The following documents (if applicable) are emailed to the Client with the approval letter:
 - Required Elements for Brochures, Syllabi, and/or enduring materials*
 - Grant Letter of Agreement (LOA)
 - Registration Template
 - Sign-in Template and/or CME Credit Attestation Form
 - Sample Evaluation, if requested

*Note: Please submit grant letter(s) of agreement for review and DOCME signature as soon as possible. Both the commercial supporter and DOCME must sign the grant agreement prior to acknowledgement.

Step 6 – Client prepares and submits to DOCME draft marketing materials (save-the-date card, brochure, email announcement, website, etc).

- Please refer to Required Elements for Brochures to ensure that all CME information is included.
- DOCME reviews and approves (3 business days following receipt).

Step 7 – Client prepares and submits to DOCME draft syllabus, enduring material, and evaluation.

- All Attestation Disclosure Agreements must be received in order for materials to be approved.
- Please refer to Required Elements for Syllabus or Enduring Materials to ensure that all information is included.
- DOCME reviews and approves (6 business days following receipt).

Step 8 – Following the CME/CE activity, Client submits the following to DOCME within 14 days. *Note: Credit will be issued, certificates emailed, and online transcripts available following receipt of this information.*

- Electronic copy of participant list, depicting addresses, etc. of participants who request CME credit
- Complete sign-in sheets or credit attestation forms for each day
- Evaluation summary (separated by physicians and other healthcare professionals)
- 3 copies of the brochure, enduring materials, marketing materials and 1 copy of the syllabus/meeting folder
- “**Estimated**” final budget report, listing all income and expenses (no need to wait for complete budget resolution please estimate variance from initial budget)
- Copies of commercial support grant checks and/or check numbers and date paid