Joint Accreditation Closing Documents Checklist V1.1

☐ **Program Content**

OCME must have an idea of what topics were taught. If you use descriptive titles for your child sessions or have imported your agenda directly into the Activity, you have met this standard.)

☐ **Disclosure**

*Financial Relationships must be disclosed by **everyone** in a position to control content of the education. Disclosures are requested and collected electronically **prior** the start of the program, so this standard is met before the Activity begins.*

☐ **Evidence of mitigated conflict of interest**

All Individuals in a position to control content through planning, teaching (including moderating and facilitating), must have disclosed relationships with ineligible companies mitigated prior to the start of the activity. Mitigation is managed electronically, except that correspondence between the conflicted individual and non-conflicted Mitigator or Office of CME needs to be uploaded to show explicit agreement to the role limitation.

☐ **Disclosure information as provided to learners**

Learners must be provided with the opportunity to review all disclosure statements, including the absence of relationships, prior to their engagement with content in the Activity.

☐ **Data or information about learners' change in competence, performance, or patient outcomes**

Evaluations are managed in the Cloud CME Portal. Data is available in real-time after the evaluation has been distributed. Thus, this is available on demand, and the standard is met as soon as several learners have completed an evaluation for each of your Activities. (RSS is considered one Activity for the entire year, so only one evaluation is required.)

☐ **Joint Accreditation statement and External Accreditor statements**

You must show that the applicable Accreditation statement(s) were provided to learners before they engaged with the educational experience. For any credit type in the Joint Accreditation Umbrella, the Joint Accreditation Statement is used. If you are working with an external Accreditor directly, you must use their required language.

☐ **Accreditor designation statement(s)**

You must show that the applicable Designation statement(s) were provided to learners before they engaged with the educational experience. For any credit type in the Joint Accreditation Umbrella, the Designation statements can be found in this packet. If you are working with an external Accreditor directly, you must use their required designation language.

If the course was commercially supported (see next page) …

Closing Documents Continued…

(ONLY) If the course was commercially supported

☐ **Actuals/ Final Budget**

All programs that have exhibitors or receive grants from ineligible organizations must provide a final/actual profit and loss statement that details the receipt and expenditure of all of Supporter funds.

☐ **Fully executed commercial support and exhibitor agreements**

Grants must be signed and dated by the Grantor and the Office of CME before the start date of the Activity. Course Directors may not sign grants. Exhibitor agreements must also be signed by both the Vendor and the Office of CME prior to the start date of the Activity. When the Office of CME exhibitor agreement is acceptable to the vendor, a UCSF Activity Administrator or Planner may sign and date it in lieu of the Office of CME. Use the naming convention for fully executed agreements: [Course Number]_EXH or GR_[Supporter Name]_$Amt. Example: MDE28243_GR_BucksRUs_$50K would be the name of a fully executed grant agreement with Bucks R Us to provide $50,000. You can add a "!" at the beginning for incomplete agreements; for example, !MDE28243_GR_BucksRUs_$50K might only have one signature or not have been routed for signature yet.

☐ **Commercial support disclosure/acknowledgement**

Courses that receive funds from exhibitors or grantors are required to acknowledge that support to the learners before the start of the program. This can be done on a flyer, invitation, brochure, course syllabus, and registration and marketing pages. Acknowledgement built into marketing or registration pages should be captured and uploaded to the Cloud CME Portal as a unique file