

This Continuing Medical Education activity is being jointly provided between St. David's HealthCare, as an accredited CME provider and the EP Live Foundation, as the Joint Provider.

Title of Activity	EP Live	Location	St. David's Medical Center
Date of Activity	April 2-3, 2019		
Joint Provider Contact			
Name:			
Email:			
Phone:			
Address:			

St. David's HealthCare (SDH) is accredited by the Texas Medical Association (TMA) to provide continuing medical education (CME) for physicians. As an accredited provider, SDH can award/issue *AMA PRA Category 1 Credit*[™]. The SDH CME Dept. is responsible for ensuring the quality and scientific integrity of all SDH designated CME activities and for meeting the requirements of TMA, the Accreditation Council for Continuing Medical Education (ACCME) Standards for Commercial Support, the American Medical Association (AMA), and the policies of SDH.

Joint Providership refers to CME activity planning and presentation in partnership with a non-accredited entity. The non-accredited entity cannot be considered an ACCME defined commercial interest. The accredited provider accepts overall responsibility and must be able to provide written documentation that demonstrates how each jointly provided activity was planned and implemented in compliance with the TMA/ACCME's Accreditation requirement and policies.

The joint provider shall adhere to these same policies and procedures and otherwise cooperate with the SDH CME Dept. to satisfy the requirements. In order to acceptably do so, the accredited provider must enter the joint providership arrangement early in the planning process so that disclosure and resolution of conflicts of interest can be accomplished.

Materials that demonstrate compliance may be from either the TMA accredited provider's files or those of the non-accredited provider. The accredited provider must inform the learner of the joint providership relationship through the use of the appropriate accreditation statement below, to be used only after the accredited provider has approved the activity and notified the joint provider:

Joint Provider Statement

This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Texas Medical Association (TMA) through the joint providership of St. David's HealthCare and the EP Live Foundation. The St. David's HealthCare is accredited by TMA to provide continuing medical education for physicians.

The St. David's HealthCare designates this Live Activity for a maximum of <<number of credits>> *AMA PRA Category 1 Credit(s)*[™]. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

The purpose of this agreement is to articulate the roles and responsibilities of the SDH CME Dept., and the joint provider in the planning, offering, and evaluating of the requested activity. The SDH CME Dept. may revoke the provision of *AMA PRA Category 1 Credit*[™] for the activity at any time due to noncompliance with accreditation guidelines or other factors that might jeopardize the goals of the activity.

The following checklist outlines the roles and responsibilities between the SDH CME Dept. and the EP Live Foundation for the above listed educational activity. Please review the checklist, along with the **Commercial Support Guidelines for Meeting Planners**.

	I have read the Commercial Support Guidelines document provided by the SDH CME Dept. and agree to abide by the ACCME Standards for Commercial Support.	
	If the terms outlined within the checklist are acceptable, please sign below and return the form via email at Christine.Rocha@stdavids.com	
	Joint Provider Representative:	
	Signature of Representative:	Date:
	Signature of SDH CME Dept.:	Date:

Roles and Responsibilities Checklist

PRIOR TO THE ACTIVITY		
Task	St. David's CME Dept.	Joint Provider (JP)
Initial consultation	Participate in meeting & setup reoccurring meetings	Participate in meeting & setup reoccurring meetings
Joint Provider Agreement & Commercial Support Guidelines	Submit forms to JP for review and signature ✓	Review and sign the JP agreement to include the <i>Commercial Support Guidelines</i> and <i>Roles and Responsibilities Checklist</i> . *A fully executed copy must be on file before proceeding.
CME Application/Planning Worksheet	<ul style="list-style-type: none"> • Provide 2018 application to JP to review and revise ✓ • Upon receipt of the new application, review/provide feedback, and promptly submit to the CME Committee for approval • Provide written notification to JP once the committee approves the application, including the appropriately joint provider statement 	Complete and submit the entire application 6 months prior to the activity , to include the following: <ul style="list-style-type: none"> • Needs assessment data, Identification of the learning gap(s), Identification of what you could change and measure in terms of competence (new strategies), or performance, or patient outcomes, & global learning objectives • Confirmation of credit amount requesting • Agenda (with time, speakers, and topics) • Preliminary Budget
Relevant Financial Disclosure Forms & Resolution of possible Conflict of Interest	<ul style="list-style-type: none"> • Upon receipt of the completed list, reach out to ALL planners, moderators, and speakers to gather forms • If potential COI is disclosed, reach out to resolve the possible conflict of interest by having the speaker/planner complete a COI Resolution form, copy the JP to keep apprised 	<ul style="list-style-type: none"> • Provide list and emails of non-faculty planners & their roles/responsibilities • Provide list and emails of confirmed faculty speakers
Presenter/Faculty Forms	<ul style="list-style-type: none"> • Reach out to St. David's admin team to inquire about HealthCast recording • Provide speaker request template 	Gather the following: <ul style="list-style-type: none"> • Send confirmation/speaker request letters to presenters/faculty with information about the activity and documentation required. • Speaker Agreements • Curriculum Vitae • Draft of presentation slide-deck *submitted to SDH prior to presentation • HealthCast Consent and Release Form & 5 question template (if applicable)
Commercial Support & Exhibitor	<ul style="list-style-type: none"> • Provide JP with Letter of Agreement Template • Provide JP with SDH exhibitor application/agreement verbiage✓ • Provide JP with Financial Spreadsheet template ✓ 	<ul style="list-style-type: none"> • Informing SDH of any commercial support involved and utilizes the provided SDH agreements. *Letter of agreements must be signed by all parties: the joint-provider, the SDH CME Dept. and the commercial support. • Provide list of anticipated commercial support income & exhibitor income • Submit grant applications, execute letters of agreement, receive and disburse grant funds. Oversight and management of grant funds will be performed in accordance with accreditation guidelines. • Exhibit booth space sales, including the development of exhibitor/sponsor letters, and coordination of booth setup/breakdown. • Submit all signed documents prior to the conference
Registration (<i>Tracking RSVPs and accepting payment</i>)		<ul style="list-style-type: none"> • Responsible for attendee online registration, confirmations, database management, payment processing, and attendee support • Identify potential attendees through established general medical mailing/distribution lists. The JP shall not use lists provided by commercial companies.

Roles and Responsibilities Checklist

Advertisement	<ul style="list-style-type: none"> Review promotional materials and provide feedback before distribution to ensure compliance 	<p>Furnish SDH with a copy of all print and electronic marketing materials for review & approval 2 weeks prior to publishing/distributing.</p> <ul style="list-style-type: none"> Save-The-Dates, with limited preliminary information can be sent out prior to approval. See notes for rules related to this. The official brochure should include the following: <ol style="list-style-type: none"> Jointly provided CME accreditation designation statement Program Overview Target Audience Educational Objectives Educational Method(s) Disclosure Policy Acknowledgement of Educational Grants/Commercial Support (both financial & in-kind contributions) *unless there is a mutual agreement to include elsewhere prior to presentation
Evaluation Method/Measuring Outcomes	The SDH CME Dept. will create evaluations via survey monkey and provide the link to the JP	JP to confirm method of distribution. The JP will use the evaluation and outcomes assessment forms provided by SDH unless otherwise agreed.
DURING ACTIVITY		
Task	St. David's CME Dept.	Joint Provider (JP)
Onsite Coordination	<ul style="list-style-type: none"> The SDH CME Dept. will stop by in the morning to go over last minute items, if necessary 	<p>Responsible for on-site registration:</p> <ul style="list-style-type: none"> Must include check-ins that differentiate between physicians and other learners. Ensure that all participants sign the official attendance roster <p>See additional roles and responsibilities below.</p>
Disclosure to Learners /	<ul style="list-style-type: none"> Provide JP with a list of faculty and planners who disclosed financial relationships and those who didn't, the CME Dept. will provide verbiage for the disclosure to learners 	<p>Relevant financial relationships of those with control over CME content must be displayed for learners utilizes one of the following options:</p> <ul style="list-style-type: none"> Provide the disclosure info in the program syllabus or handout Disclosure information on the 1st slide of the presentation, to be reviewed prior to start of the activity.
Commercial Support Disclosures		Commercial support must be acknowledged in printed material prior to the start of activity, in a format reviewed and approved by the SDH CME Dept.
POST ACTIVITY		
Certificates	SDH will issue the certificate via Survey Monkey. Certificates will be attached to the post-activity evaluations.	Inform learners of the process
Final Attendance List	<ul style="list-style-type: none"> Maintain attendance records of the activity for a minimum of seven years. Track and enter credits for physicians on staff 	Provide database and official attendance roster (sign-in sheets) directly following the program.
Final activity budget	<ul style="list-style-type: none"> Review final documentation for compliance issues and report in the PARs system 	Submit within 30 days, a final accounting report for the activity, including all revenue and expenses, particularly speaker expenses and honoraria.

Roles and Responsibilities Checklist

Joint Provider Additional Roles and Responsibilities

- The EP Live Foundation planner may manage each of the budget items below, and apply procured grants, sponsorship funds, and attendee revenue to these budget centers: Faculty Honoraria, Travel, Lodging and Expense Reimbursement, Food & Beverage (*if allowed in LOA*)
- Completion of HRS sponsorship application, payment, and procurement of Heart Rhythm Society Co- Sponsorship
- A/V and Live Case Production
- Post activity educational grant reconciliation with commercial supporters
- Audience Generation services
- Website hosting, management, maintenance, content updates, registration, and creative design
- Oversight of room staging, daily schedule of educational and F&B events.
- Management of faculty travel/lodging, including procurement of faculty shuttle.
- Course material development and production, to include attendee brochure production/postage, syllabus books, faculty and attendee badges, schedule at a glance handout – final approval by SDH

- **Onsite Coordination**
 - **Registration-** The JP will ensure that representatives of commercial supporters are not involved in the registration of attendees, evaluation of the program, distribution of certificates, etc. The JP will ensure that the registration area is free of commercial influence (personnel and /or materials) and reserved solely for educational support endeavors.
 - **Registration Packets-** The JP will prepare and distribute activity-related materials for participants, including educational and promotional materials that have been reviewed and approved by SDH.
 - **Meeting Room-** The JP will ensure that the educational meeting room(s) are exclusively reserved for the educational activity. Commercial displays, signs, logos, banners, or other forms of commercial presence should be located outside the meeting space (educational area).
 - **Commercial Contacts, Exhibits, Displays.** The JP will ensure that commercial contacts, etc. are conducted in another room or in a different area from the educational meeting rooms. Exhibit tables for commercial support representatives must be located in an area separate from the registration or educational area.
 - **Food and Beverage Functions.** The JP will ensure that these functions are "modest" and do not overshadow the educational purpose of the activity. The meeting time of the program will determine what food and beverages are served.
 - **Amenities and Social Events.** The JP will ensure that any gifts or incentives for registrants must follow established AMA and ACCME guidelines and standards. All social events or similar activities held in conjunction with the educational activity should be reasonable in cost, impact, and not in competition with or take precedence over the educational event.