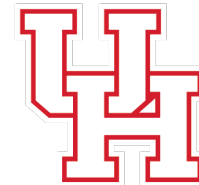


TILMAN J. FERTITTA FAMILY COLLEGE OF MEDICINE CONTINUING MEDICAL EDUCATION PROGRAM

Planning form for AMA PRA Category 1 Credit(s)TM activity



Applications for sponsorship of a continuing medical education (CME) activity must be received at the **earliest stages** of program development so that the Tilman J. Fertitta Family College of Medicine Office of Continuing Medical Education (CME) may review the activity information to determine whether the program meets the requirements as defined by the American Medical Association and complies with the accreditation criteria, policies and Standards of the Accreditation Council for Continuing Medical Education (ACCME). All proposed continuing medical education activities will be required to submit a CME Activity Planning Form Application no less than three (3) months prior to a regularly scheduled series (RSS) and no less than six (6) months prior to a conference live activity.

Any and all promotional materials for the activity requesting CME MAY NOT be distributed until they are approved by the CME Office.

General Information:

Today's Date:	Date of activity:
Name of Activity:	

****Please read the application carefully noting deadline and guideline requirements. ****

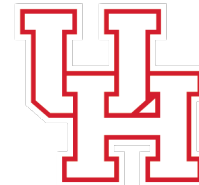
The **Course Director** is responsible for planning the CME activity independent of the control of ACCME defined commercial interests and has overall responsibility for ensuring that the activity complies with the ACCME Accreditation Criteria and Standards for Commercial Support, AMA policies and Fertitta College of Medicine Policies.

The **Course Director** generates the educational content for an activity, which has intrinsic academic validity, and falls within the spectrum of medicine. The **Course Director** has prime responsibility for designing a curriculum, which fosters improving knowledge, skills and/or attitudes that support practice-based learning and improvement. Specific responsibilities include:

- Aligning the conference with the Fertitta College of Medicine Mission Statement.
- Documenting a needs assessment with underlying professional practice gaps of the learners.
- Establishing overall activity objectives.
- Validation of Clinical Content - Defining the educational content and overseeing the educational content in order that:
 - It is balanced, objective, scientifically rigorous and independent of commercialism.
 - All the recommendations involving clinical medicine in the CME activity are based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients; and
 - All scientific research referred to, reported or used in the CME activity in support or justification of a patient care recommendation conforms to the generally accepted standards of experimental design, data collection and analysis.
 - At no time will the CME activity promote recommendations or treatments which are known to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients with the clinical problem being addressed while critical review of evolving topics is strongly encouraged.
- Ensure all presentations are HIPAA and PHI compliant.

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- This educational intervention is designed:
 - To change competence, performance or patient outcomes.
 - Content matches learners' current or potential scope of professional activities.
- Defining the educational method appropriate for the setting, objectives, and desired results of the activity.
- Contacting and scheduling individual speakers and moderators.
 - Initiate contact with speakers, planners, moderators
 - Maintain control over content, selection of speakers, and topics.
 - Obtain financial disclosures for those with control over content including:
 - Planning Committee members
 - Presenters
 - Moderators/Authors
- Implement Fertitta College of Medicine Continuing Medical Education mechanism for resolving potential conflicts of interest for those reporting relevant relationships using the 'Potential Conflict of Interest Mitigation Form'
- Disclosures must be received by the Fertitta College of Medicine Office of Continuing Medical Education:
 - No later than one month in advance of the activity start date.
 - Conflicts of interest resolved and documentation in the CME Office no later than 2 weeks prior to the activity start date.
 - Financial disclosures and review forms submitted electronically or paper copy.
- Oversee the granting of honoraria and the amount to be paid, based on the CME honorarium policy (if applicable).
- Keeping within budgetary constraints.
- Maintaining attendance records.
- Prior to production and distribution, all publicity and promotional materials, activity syllabus, and handouts must receive approval by Fertitta College of Medicine Office of Continuing Education.
- Submit to the Fertitta College of Medicine Office of Continuing Medical Education all related end of activity materials within 7 days after the activity.

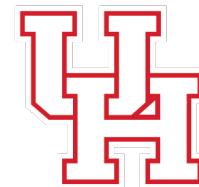
Course Director Name (including all credentials):	
Course Director Email Address:	
Course Director Phone Number (where you can be reached):	

The Course Coordinator manages all of the activity logistics such as room reservation, sending out activity announcement, printing activity materials, ordering catering, etc.

Activity Coordinator Name (including all credentials):	
Activity Coordinator Email Address:	

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Activity Coordinator Phone Number:	
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Type of Activity: (please check one of the following types below)

<input type="checkbox"/>	Live Activity– single or multi-day activity with the same material presented each time (i.e. conference, annual meeting).
<input type="checkbox"/>	Regularly Scheduled Series – activity that occurs on a regular basis with global objectives (i.e. Grand Rounds, Tumor Board, M & M) with different material presented at each activity.
<input type="checkbox"/>	Committee Learning - activity that involves a learner’s participation in a committee process where the subject of which, if taught/learned in another format would be considered within the definition of continuing education.
<input type="checkbox"/>	Enduring Material is a printed, recorded, or computer-presented activity that may be used over time at various locations.

Venue for Activity: (please specify below)

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Providership: Joint providership is defined as the providership of a CME activity by one or more accredited and one or more non accredited organization. Ineligible companies (e.g. drug or device manufacturers) are prohibited from engaging in joint providership.

<input checked="" type="checkbox"/>	Directly provided by Tilman J. Fertitta Family College of Medicine (University of Houston)
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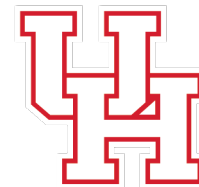
Planning Committee:

Please complete the grid below for all individuals involved in the planning of this activity who have control over the content (attach an additional sheet if necessary). A Conflict-of-Interest Financial Disclosure Form for each of the individuals listed must be attached to the application.

Name and Title (MD, DO, PhD, etc.)	Role in the planning process	CME Office Use
		<input type="checkbox"/> Form <input type="checkbox"/> COI
		<input type="checkbox"/> Form <input type="checkbox"/> COI
		<input type="checkbox"/> Form <input type="checkbox"/> COI
		<input type="checkbox"/> Form <input type="checkbox"/> COI

TILMAN J. FERTITTA FAMILY COLLEGE OF MEDICINE CONTINUING MEDICAL EDUCATION PROGRAM

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Professional Practice Gap Analysis:

What is the problem or issue(s) occurring in practice that you want to affect/change with this activity? (C2)

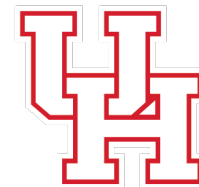
Please identify the professional practice gap(s) addressed with this CME activity. A professional practice gap, or quality gap, is the difference between what is currently being achieved and what could be achieved using best practice guidelines. Think about professional practice gaps in these terms:

- 1) what's the problem you are trying to address;
- 2) how do you know it's a problem and what do you think is contributing to the problem;
- 3) are you seeking to change strategies, skills, performance or patient outcomes;
- 4) what type of activity do you think will best achieve that goal; and
- 5) how will you know if you've been successful. These can go beyond patient care and include systems-based practice, informatics, leadership, and administration.

Current State: What is the problem you are trying to address?	Desired State: What should be happening?	Identified Gap: Difference between what is and what should be.	Methods used to Identify Professional Practice Gap:
<i>EXAMPLE: 40% of patients 65 and older in our community health clinic are receiving the pneumococcal vaccine consistent with national guidelines.</i>	<i>EXAMPLE: 100% of patients 65 and older in our community health clinic receive the pneumococcal vaccine consistent with national guidelines.</i>	<i>EXAMPLE: 60% of patients 65 and older in our community health clinic are not receiving the pneumococcal vaccine consistent with national guidelines.</i>	<i>EXAMPLE: Chart audit of patient files; interviews with nurses; 75% of nurses report they are not familiar with updated national guidelines and therefore were not providing information about the vaccine.</i>

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Why does the gap exist? What are the educational needs that are the cause of the gap: (Check all that apply)

<input type="checkbox"/>	Knowledge-based	(Information)
<input type="checkbox"/>	Competence-based	(Ability to apply information and skills)
<input type="checkbox"/>	Performance-based	(Actual implementation or application of information or skills)

What data sources were used to identify learners' need(s) related to these issues? (Check all that apply)
Please attach any data sources you identified to this application.

<input type="checkbox"/>	Evaluation Data from Prior Activities	<input type="checkbox"/>	Epidemiological Trends
<input type="checkbox"/>	Literature/Web Research	<input type="checkbox"/>	State or National Patient Care Data
<input type="checkbox"/>	Regulatory Requirements	<input type="checkbox"/>	Medical Specialty Association Recommendations
<input type="checkbox"/>	Performance Improvement Activity	<input type="checkbox"/>	Quality Improvement Analysis
<input type="checkbox"/>	Pre/Post Tests	<input type="checkbox"/>	Survey of Physicians
<input type="checkbox"/>	Recommendation of Experts	<input type="checkbox"/>	Medical Specialty Board
<input type="checkbox"/>	Other, please specify:		

Planned Outcomes and Educational Impact (C3 & C36):

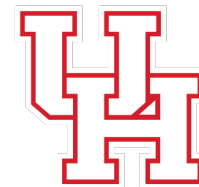
This activity is designed to change (check all that apply):

<input type="checkbox"/>	Competence	<input type="checkbox"/>	Performance
<input type="checkbox"/>	Patient Outcomes		

Describe the anticipated changes in learners as a result of participating in this activity. What will participants do differently in their practice, and how will these changes benefit patients and/or the healthcare system? If relevant, also note any factors that may inhibit achieving these outcomes despite the educational intervention.

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How will you know if you have been effective in producing change? (C11)

Please be sure that you are able to produce this information at the end of the activity.

<input type="checkbox"/>	Pre & Post tests	<input type="checkbox"/>	Skill evaluation during or after activity
<input type="checkbox"/>	Post Activity Evaluation	<input type="checkbox"/>	Patient Interviews / Surveys
<input type="checkbox"/>	Quality Improvement Analysis / Statistical Review	<input type="checkbox"/>	Performance Improvement/ Chart Audits Review
<input type="checkbox"/>	Other, please specify:		

What is the highest level of outcome measurement that this activity will meet? (C11)

Please be sure that you are able to produce this information at the end of the activity.

<input type="checkbox"/>	Participation: (attendance records)	<input type="checkbox"/>	Satisfaction: (questionnaires completed by attendees)
<input type="checkbox"/>	Learning (knows): (pre-and-post tests of applying information)	<input type="checkbox"/>	Learning (knows how): (pre-and-post tests of applying information)
<input type="checkbox"/>	Learning (shows how): (observation during activity)	<input type="checkbox"/>	Performance: (observation in a patient care setting, chart review)
<input type="checkbox"/>	Patient Health: (health status measures from chart or administrative databases)	<input type="checkbox"/>	Community Health: (epidemiological data, local/state/national reports)
<input type="checkbox"/>	Other, please specify:		

Target Audience:

Who is the target audience and how is the content of this activity related to their current or potential scope of professional activities? (C4)

<input type="checkbox"/>	Physicians	<input type="checkbox"/>	Nurses
<input type="checkbox"/>	Pharmacists	<input type="checkbox"/>	Non-Clinical Staff
<input type="checkbox"/>	Allied Health Care Professionals, including: Community Health Professionals, Behavioral Health Professionals		
	Other:		

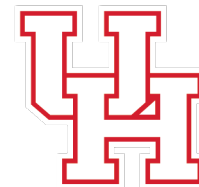
Instructional/Learning Objectives(s):

Please identify 3-5 overall objectives for each presentation. Please use active, learner-centered objectives for this activity written to reflect the performance your learners should be able to exhibit as a result of participation in the activity. Think S.M.A.R.T. goals Specific, Measurable, Attainable, Relevant, and Time-bound. Here is a reference if you need help getting started, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5944406/>. If you need assistance, please contact the Fertitta College of Medicine, CME Office.

Note: Learning objectives should align with at least one of the ACGME, IOM, or IPEC competencies as appropriate to the activity design.

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At the conclusion of this activity, the participant should be able to:

<i>Example: Compose a well-defined learning objective after reading the article on “How to Write Well-Defined Learning Objectives”.</i>

Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
define	classify	apply	analyze	arrange	assess
identify	compile	calculate	calculate	assemble	compare
label	conclude	demonstrate	categorize	compose	critique
list	discuss	develop	classify	construct	decide
match	describe	interpret	criticize	design	determine
name	explain	locate	compare	develop	establish
recall	express	operate	contrast	diagnose	evaluate
recognize	give examples	perform	determine	manage	judge
record	identify	practice	differentiate	organize	justify
relate	interpret	predict	distinguish	plan	measure
repeat	recognize	present	examine	propose	rate
select	summarize	report	outline	relate	recommend
state	translate	use	test	summarize	select

Words to Avoid

appreciate	believe	improve	learn
approach	grasp the significance of	increase	thinks critically
become	grow	know	understand

Which competencies are addressed with this activity? (C6) (Check all that apply)

ACGME/ABMS Competencies		Institute of Medicine Competencies		Interprofessional Education Collaborative Competencies	
<input type="checkbox"/>	Patient care & procedural skills	<input type="checkbox"/>	Provide patient-centered care	<input type="checkbox"/>	Values/Ethics for Interprofessional practice
<input type="checkbox"/>	Medical knowledge	<input type="checkbox"/>	Work in interdisciplinary teams	<input type="checkbox"/>	Roles/ Responsibilities
<input type="checkbox"/>	Practice-based learning & improvement.	<input type="checkbox"/>	Employ evidence-based practice	<input type="checkbox"/>	Interprofessional Communications
<input type="checkbox"/>	Interpersonal & communications skills	<input type="checkbox"/>	Apply quality improvement	<input type="checkbox"/>	Teams & teamwork
<input type="checkbox"/>	Professionalism	<input type="checkbox"/>	Utilize Informatics		
<input type="checkbox"/>	Systems- based practice				

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Competency Alignment Statement:

Please describe how the educational objectives and content of this activity are designed to reflect one or more of the following frameworks of desirable physician attributes:

- ACGME Core Competencies
- Institute of Medicine (IOM) Competencies
- Interprofessional Education Collaborative (IPEC) Competencies

Include a short explanation of which competencies are prioritized and why they are relevant to the intended target audience and educational goals.

Do we have the right structure and people to accomplish what we need to do? (C5) What is the format and education design for this activity?

<input type="checkbox"/> Conference/Seminar/Workshop	<input type="checkbox"/> Web-based	<input type="checkbox"/> Audio
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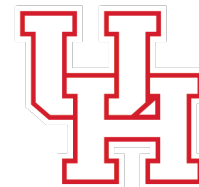
Educational Design components: (check all that apply)

<input type="checkbox"/> Presentation / Live Lecture	<input type="checkbox"/> Case Studies and Discussion
<input type="checkbox"/> Panel Discussions	<input type="checkbox"/> Demonstration / Skills Development
<input type="checkbox"/> Role Playing / Standardized Patient	<input type="checkbox"/> Round Table / Breakout Discussions
<input type="checkbox"/> Literature Review, Video/Audio Archives	<input type="checkbox"/>
<input type="checkbox"/> Other, please specify:	

How did you identify the appropriate format and educational design for this activity?

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Describe the process for curriculum development and faculty selection for this activity.

Faculty/Speakers (not applicable for committee learning):

Please complete the grid below for all individuals who will serve as faculty/speaker for this activity. If the requested credit designation for this activity is more than 2.00 credit hours, please also include the invited faculty on the required program agenda. A Financial Disclosure Form for each faculty member/speaker must be submitted to the **CME Office** no less than 4 weeks prior to the activity. **ALL CONFLICTS MUST BE RESOLVED PRIOR TO THE ACTIVITY.** The CME Office will determine the relevancy of the conflict to the activity. A Potential Conflict of Interest Mitigation Form for each identified conflict is will be completed no less than 2 weeks prior to the activity.

Speaker Presentation Letter: Each speaker **MUST** receive a Speaker Presentation Letter which includes the faculty's name, topic, date/time of presentation, objectives and acknowledgement of the Standards for Commercial Support.

Name/Title (MD, DO, PhD, etc.)	Date Speaker Presentation Letter received:	CME Office Use	Name/Title (MD, DO, PhD, etc.)	Date Speaker Presentation Letter received:	CME Office use
		<input type="checkbox"/> Form <input type="checkbox"/> COI			<input type="checkbox"/> Form <input type="checkbox"/> COI
		<input type="checkbox"/> Form <input type="checkbox"/> COI			<input type="checkbox"/> Form <input type="checkbox"/> COI
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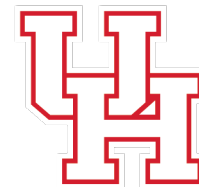
Additional Competencies and Information:

Will you include?

	No	Planners	Speakers	Audience
More than one profession (representative of the target audience to enable effective collaboration and improve health outcomes) – (C23)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patients and/or public representatives (who are not healthcare professionals) – (C24)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students of the health professions (builds bridges across the education continuum, encourages students and professionals to work together) – (C25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Will you evaluate change to the healthcare team? (C28)

<input type="checkbox"/>	No	<input type="checkbox"/>	Yes
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Will you collaborate with other organizations to more fully achieve healthcare goals, enhance the efficacy of the activity, and address community/ population health issues? (C28)

<input type="checkbox"/>	No	<input type="checkbox"/>	Yes, list organizations:
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Will you include any innovations or creative approaches? If so what approaches (educational approaches, design, assessment, use of technology) (C35) Please specify:

<i>Example: Attendees will receive a copy of the PowerPoint presentation and a supplemental hand out sheet.</i>

Will the following topics be included in this activity?

Health informatics (C26) and the use of practice data for practice and/ or quality improvement?

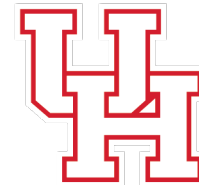
<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, teaches about collection, analysis or synthesis of health practice data
<input type="checkbox"/>	Yes, uses health/ practice data to teach about healthcare improvement
<input type="checkbox"/>	Other, please specify:

Health of populations, public health (C27), (C38). Implement change in health behaviors, social and economic factors, and the publics' physical environment, impact on community health outcomes.

<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, teaches strategies that learners can use to achieve improvements in population health
<input type="checkbox"/>	Yes, by collaborating in the process of improving patient or community health
<input type="checkbox"/>	Yes, by demonstrating improvements in patient or community health.
<input type="checkbox"/>	Other, please specify:

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Communication Skills (C29) The learner becomes more self-aware of their communication skills, and implement educational interventions to improve those skills

<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, by evaluation of observed communication skills
<input type="checkbox"/>	Yes, by formative feedback to learner about communication skills
<input type="checkbox"/>	Other, please specify:

Technical and Procedural skills (C30) updating, reinforcement, and reassessment

<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, by evaluation of observed technical and procedural skills
<input type="checkbox"/>	Yes, by formative feedback to learner about technical and procedural skills
<input type="checkbox"/>	Other, please specify:

Will you use individualized learning plans for learners? (C31)

<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, by tracking learners repeated engagement & longitudinal plan over weeks/ months?
<input type="checkbox"/>	Yes, by providing individual feedback to learner to close practice gaps.
<input type="checkbox"/>	Other, please specify:

Will you provide any tools and/ or resources for attendees to take home to support changes in learner practice (reminder cards, flow sheets, online instructional material)? (C32)

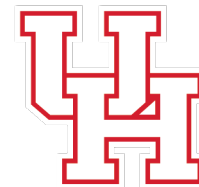
<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, please specify:

Healthcare Quality Improvement by changing process of care or system performance? (C37)

<input type="checkbox"/>	No
<input type="checkbox"/>	Yes, by collaborating in the process of healthcare quality improvement
<input type="checkbox"/>	Yes, by demonstrating improvement in quality of healthcare.
<input type="checkbox"/>	Other, please specify:

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Agenda:

If the requested credit designation for this activity is more than 2.00 credit hours, please attach an agenda that lists the topic, scheduled time for each presentation, invited faculty, and objectives for each presentation.

Commercial Support:

The acceptance of any commercial support (e.g., exhibit booths) that is in compliance with Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education (www.accme.org/standards) must be fully managed by the CME program.

Do you intend to seek (or have you already sought) commercial support for this educational activity? This includes in kind donations (use of an ultrasound machine), and/or exhibit booth.

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

Post activity close out materials:

Post-activity close out materials are due to the Fertitta College of Medicine Office of Continuing Medical Education following the close of the CME activity. Questions may be addressed via email at comcme@central.uh.edu or by calling (713) 743-8178.

****Adherence to the requirements and timeline as outlined below is crucial in providing CME credit for your activity. Failure to meet established guidelines will result in denial of CME credit. ****

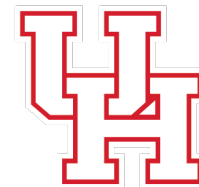
Date Sent to CME Office	Schedule of Deliverables	Date Due
	Flyer, Announcement, Brochure (approve template)	Approval is required by the CME Office <u>before</u> each session flyer is distributed
	Completed Disclosure documents for all planners and faculty/speakers received (one per person, per year)	Due to the CME Office 4 weeks prior to the activity
	Draft syllabus, agenda, course materials for approval prior to distribution (for each activity)	Due to the CME Office 7 days before the activity
	Attendee Roster (for each activity)	Due to the CME Office 7 days after activity
	Evaluation forms and summary	Due to the CME Office 14 days after activity

Responsibilities of Fertitta College of Medicine Continuing Medical Education

The Fertitta College of Medicine Continuing Medical Education program is responsible for carrying out the accreditation logistics involved with the conducting of the educational program, and to do so in

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compliance with all applicable institutional and regulatory standards and guidelines. Specific responsibilities include:

- Assuring that since the meeting includes a physician audience, then it is conducted in accordance with the ACCME accreditation requirements and policies along with all applicable standards and guidelines.
- Overseeing all aspects, beginning with activity development and proceeding through implementation and activity evaluation.
- Assuring any commercial support received is in compliance with Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education.
- Fertitta College of Medicine Continuing Medical Education staff member attend, at least, one day of the activity; to ensure compliance with ACCME policies, Standards for Commercial SupportSM and ACCME compliance criteria.

Attestation and Signature:

I attest that I have read and agree with the contents of this agreement. Please sign or type your name into the appropriate spaces below. Please e-mail this agreement to the CME Office.

Name
Course Director

Date

Name
Activity Coordinator (if applicable)

Date

Name
Co-Course Director (if applicable)

Date

Wendy M. Fitzgerald
Director, Continuing Medical Education

Date

Name
Chair, Continuing Medical Education Committee

Date