



Administration of Duties

Live Conferences Packages*Regularly Scheduled Series*Live Activities (1-3 hours)

	Non-Managed Conference (see fee schedule for an a la cart options)	Managed Conference (minimum 4 credit hours) (see fee schedule for any a la cart options)	Regularly Scheduled Series/Grand Rounds (Some a la carte options not available for this type of program)	Live Activities (1-3 credit hours) (Some a la carte options not available for this type of program)
*PC represents Planning Committee responsibilities *CPE represents Office of CPE responsibilities				
*Pre-Application Consultation (Application Forms, Timeline)	CPE	CPE	CPE	CPE
*AMA PRA Category 1 Credit(s)™, NCPD contact hours (Approval of application/planning form, Planning Committee disclosures, Record Credits, 6 Year Record Keeping, and Letter of Agreement (LOA) facilitation.)	CPE	CPE	CPE	CPE
Conference CE documentation collection (Disclosure Forms, CV's, Power Point Presentations, and other accreditation documentation) (Any extra speaker documents must be discussed)	PC	CPE	N/A	N/A
Registration				
*Evaluation Form and Summary (Mandatory for CME/NCPD Credit/Contact Hour)	CPE/PC	CPE /PC	Per Session/ CPE /PC	CPE /PC
*Certificate of Attendance/Credit	CPE	CPE	Per Session/ CPE	CPE
*Commercial Support (Commercial Support Documentation, Payment Collection for Educational Grants)	CME/ PC (with signed agreement)	CME/ PC (with signed agreement)		CPE /PC
Pre-Course Registration, Credit Card Service, Tracking of Registration Funds, Deposit of Registration funds	CPE/PC	CPE /PC	N/A	N/A
On-site Registration at Conference	PC/CPE	CPE	N/A	CPE /PC
Enrollment Reports	CPE/PC	CPE	Per Session/ CPE /PC	CPE /PC
Marketing				
*Review and Approval of Brochure/Flyer to include: Disclosure Statements, and Accreditation Statements	CPE	CPE	CPE	CPE
E-marketing: Distribution of marketing (Regular weekly newsletter and special occasion individual flyer emails) on CME List serve	CPE	CPE	CPE	CPE
E-Marketing: Distribution on TTUHSC EP Tech Talk/Campus Monitors	PC	CPE	CPE /PC	CPE /PC
Logistics				
Letter of invitation to potential planning committee members, and CE event speakers/panelists/moderators	PC	PC	PC	PC
Audio/Visual work orders, Maintenance work orders; Facilities meeting; Venue Walk-Thru; Pre-approvals-Catering vetting and ordering; Alcohol Request; Venue vetting, Reservations and point of contact; Participant packet creation; Oversee brochure design vetting and printing; Syllabus/handout preparation which includes: Faculty and planner disclosure report (to include each speaker/planner/moderator/panelist); Objectives/Outcome, Accreditation Statements, Any mitigation resolution; Acknowledgement of Commercial Support and exhibitors; Travel (All other items/tasks not listed in the above listing need to be discussed throughout the planning process with adequate lead time to determine if task can be done/accomplished, i.e. virtual/technical run through's, online platform meeting set up, program time keepers) (Please see fee schedule for potential a la cart items.)	PC	CPE	N/A	N/
CME Conference/RSS Coordination				
Financial Support				
Preliminary Budget and Final Reporting	PC	CPE and PC	PC	PC
*Speaker Travel/Honoraria Processing	PC	CPE	PC	N/A
Logistical Support Invoice Processing (A/V, food, venue rental, etc...)	PC	CPE and PC	PC	N/A

*Indicates areas, which require compliance with ACCME Criteria and Standards, requires coordination with and guidance from the CPE Staff.

Timelines for Submission of Paperwork and Associated Materials

Type of Program	Submission Deadline for Planning Form & Associated Materials
Full or multi-day activity with save-the-date	8 months before event
Full or multi-day activity without save-the-date	5 months before event
Half day without save-the-date	3 ½ months before event
One to two hour activity	4 weeks before event
Series – Activity planning form	Annually 4 weeks before start of series
Series Session(s) - content form or email with speaker, session title and objectives.	2 weeks before event