# Compliance Checklist

## Single or Multiday Conferences and Symposiums

**FEES may be incurred if the activity requested is outside of CFD.**

This document details the responsibilities of the department requesting the education. The CPD Department must receive the following information to maintain compliance. Log in: [AdventHealth Continuing Education (cloud-cme.com)](https://adventhealth.cloud-cme.com/default.aspx)

[ ]  Disclosures

 **I agree to** work with the speakers on obtaining their CME required disclosure form. Information will be shared with learners **prior** to the education. The CPD Department verifies and creates a disclosure slide for the presentations.

[ ]  Accounting form

**I agree to report on all** expenses (food/venue, etc.) and all income collected from exhibitors, donations, etc. on the accounting form.

[ ]  Contracts, Receipts, and Expenses

 **I agree to upload** copies of all signed contracts, receipts and expenses for lectures/ meetings into the team created by the CPD department. Including but not limited to, exhibitors, sponsorship, catering, speaker honorariums, parking, venue, gifts, etc.

[ ]  Upload documents in the CPD Team

 **I agree to upload** Save-the-Dates, marketing flyers, PowerPoint Presentation(s), journal articles, rack cards, speaker bios, etc. into the team created by the CPD department.

[ ]  Calendar Invites

 **I agree to send** the calendar invite to the CPD calendar (CFD-S.CPD.Department@AdventHealth.com) and your designated CPD Coordinator.

[ ]  Activity Codes

 **I understand** that each conference is assigned a unique code and will test the code prior to the meeting to ensure it functions properly.

[ ]  Attendance

 **I agree to inform all learners**, including non-physicians, to record attendance electronically by texting the activity code. The Activity Owner is responsible for ensuring attendance is properly documented. Paper sign-in sheets are not accepted. TEXTING does not provide credit(s) and is the only method for learners to receive an evaluation. Learners claim credits when completing the evaluation. **If accurate attendance is not captured, providing credits can be suspended.**

[ ]  Exhibitor(s)

Anyone offering payment of any type to interact with activity speakers/learners or to display company specific items is an exhibitor. **Contact your CPD Coordinator before accepting any offers**. A **signed agreement** is required before allowing company reps in the education space. Exhibitors must be in a separate space from the education. Exhibitors can answer direct questions but cannot elaborate on their products.

[ ]  I understand vendors cannot pay for, or supply food, without involving the CPD Department first.

Forms are available at the bottom of the portal Homepage under CME Templates.

**TIP:** Please do not call the code a ‘CME Code’ or share codes via emails. Codes are date and time specific and active 30 minutes **prior**, **during** and 60 minutes **after** lectures. Instruct learners to record their attendance:

**Sign-in by texting XXXXX (activity code) to (321) 430-2999.**

**Credit can be claimed when completing the evaluation.**

[Log into the System](https://adventhealth.cloud-cme.com/default.aspx) > adventhealth.cloud-cme.com

* Sign In > Use your OPID and OPID password.
* Go to the bottom of the page, above *CME Templates* > look for the *Administration* option.
* Left side > select the *Activities* option > *RSS Dashboard* option.
* Adjust the date range to the dates you want to view > *Search.*
* You can see and adjust many things from the *RSS Dashboard.*

# UNDERSTANDING the WEBSITE (click the arrow to expand each field)

To meet *ACCME Guidelines for Integrity and Independence in Accredited Continuing Education*, the website enables the CPD Department to provide learners with information about the conference, i.e., educational topics, speakers, and registration costs (if applicable). Information can include location, hours and the number of approved credits. The website ensures the learners are provided with education that serves the needs of the patients, is valid, free from commercial influence and protects learners from promotion, marketing and commercial bias.

## DETAILS

Each activity is assigned a unique code that enables the system to capture attendance, provide evaluations and award credits. Credits **are not awarded** without completion of the evaluation.

OVERVIEW

Provides detailed information about the conference. Please carefully review each area to ensure accuracy. Let your CPD Coordinator know if changes are needed or something isn’t working properly.

* Description
* Date & Location
* Registration information – fees, parking information, cancellation policy, etc.
* Additional information – location, certificate information, who to call with questions, objectives, etc.

REGISTER

This option enables learners to register and pay (if applicable) for conference attendance.

* Learners with an active Florida medical license must include their license number to process to CE Broker.
* Inform your CPD Coordinator if you need a COMP code created.
* Continue through the process and *FINISH*. Learners will receive a confirmation email.

SPEAKERS

Provides information about each speaker, including their qualifications. Contact your CPD Coordinator if a speaker needs to change or be added/deleted. The Activity Coordinator must provide the CPD Department with the following:

* Ensure each speaker has a current *Conflict of Interest* (COI) form in the system.
* Headshot
* Rack card or bio stating education, experience, etc. NOTE: CVs are not accepted as they may contain personal information.

## SPEAKER PRESENTATIONS

Presentations are not required to have AdventHealth logos; however, if branded should only have the AdventHealth or AdventHealth co-brand logos. Speakers affiliated with other organizations can have their logo on the first slide, not on all slides.

1. Each speaker can upload their PowerPoint presentation after logging into the portal by selecting the option.
2. Logos from ineligible companies, industry support and/or device manufacturers are prohibited on presentations.
3. Embedded photos in presentations cannot display visible logos from ineligible companies.
4. Contact your CPD Coordinator if the presentation does not upload because it’s too large, has embedded videos, etc.

## SCHEDULE/ AGENDA

Complete and provide the [*Agenda* template](https://adventhealth.cloud-cme.com/assets/adventhealth/pdf/Agenda%20Template.xlsx) found at the bottom of the website home page. Word agendas cannot be imported and not accepted. If a presentation involves multiple presenters, list additional names in column ‘N’.

***Understanding the AGENDA (Information shown is for example purposes only)***

Tab 1 A guide for completing the template.

Tab 2 Use this tab for a single day conference. Delete tabs for Days 2-4 if they are not needed.

Column A **Not mandatory**, some Course Directors prefer to have subjects separated.

Columns B & D Enter time in military format.

Columns C & E Date of the conference.

Column F *Presentation Names* are required but can be modified if needed.

Columns G-I First and last names **must** be included so we can accurately identify the correct speakers.

Column J Indicate if the speaker will include a PowerPoint presentation.

Column K FORMULA – do not change.

Column L Only use this option if the lecture room has limited seating capacity.

Column M Include the conference room name where the lecture(s) will be held.

 Add more *rows* as needed.

Cell G15 – G19 DO NOT CHANGE – Formulas to total the number of education time for Days 1-4

**NOTE: Delete these tabs if not applicable**

Row 20 Include any questions you would like to be asked on the registration form in these rows. Add rows as needed.

FACULTY Tab This tab is for the CPD Department to collect *Conflict of Interest* information from the speakers.

**NOTE:** Welcome remarks, introductions, breaks, lunch periods are NOT included in the calculation of credits awarded. Credits are based solely on educational time, not the total time of the conference.

## LOCATION

If the conference is held offsite, ensure the CPD Coordinator receives the following details:

* Name, address and telephone number of the venue.
* Parking information, including costs for self-parking, valet, etc.
* Accommodation options for learners, including costs and contact information.

## EXHIBITORS

If you plan to offer exhibitor spaces at your conference, the following requirements **must** be met:

1. These users can edit and view the activity and access reports.
2. Notify the CPD Coordinator if changes need to be made.

## QR Code

Learners can utilize the QR code but must download the app via their cellphone carrier app store. Note the app is available but undergoing changes.

1. Search the app store for *CloudCME* (below).



1. When downloaded, the *Verify My Organization* is: Adventhealth

 

## SPONSORS

This area only shows if the activity is open to exhibitors and provides an area for the Activity Director to thank those who have contributed to the cost of the education.

**Trouble Shooting:** When learners call, please check the ‘HELP’ section on the portal first before referring them to the CPD Coordinator. If the issue remains unresolved, email the CPD Coordinator mailbox.

**NOTE:** The CPD Department reserves the right to suspend awarding credits for the activity if attendance or the required documentation is not received or completion of evaluations are insufficient to meet auditing purposes.

**I agree to the requirements and acknowledge failure to provide the required documentation may result in credit(s) being withheld or future activities suspended.**

**Department Coordinator:** **Date:**

**CPD Department Coordinator:** **Date:**