**Checklist of Documentation and Attachments:**

*(Place this sheet on top and be sure all applicable items are checked when you submit the Sponsorship Agreement)*

**The following attachments must accompany this application for sponsorship:**

|  |  |
| --- | --- |
|  | Draft program agenda  |
|  | Faculty listing including academic and clinical appointments  |
|  | Planning committee meeting minutes or other documentation of planning process  |
|  | Disclosure of Commercial Relationship Form and Resolution Form (if applicable) for each planning committee member  |
|  | Practice gap/needs assessment documentation from at least 2 sources  |
|  | Marketing and publicity samples, if available  |
|  | Activity Income and Expense Projection  |
|  | List of prospective sources of commercial support, if applicable  |
|  | Enduring materials only: signed addendum, production plan and sample module  |

**The following must be submitted not later than 2 weeks prior to the activity:**

|  |  |
| --- | --- |
|  | Disclosure of Commercial Relationship Form and Resolution Form (if applicable) for each speaker |
|  | Introductory syllabus pages  |
|  | Evaluation Form |
|  | Credit claim Form |
|  | Commercial support agreements, if applicable (if available) |
|  | Copies of grant and exhibit fee checks and signed exhibitor booth agreement (if available) |
|  | Enduring materials only: completed module prior to dissemination |

**The following must be submitted not later than 90 days after the conclusion of the activity:**

|  |  |
| --- | --- |
|  | Original sign-in sheets, credit claim forms or other evidence of participation |
|  | Excel spreadsheet of attendees containing first name, last name, street address, city, state, zip and last 4 digits of SSN (for activities not using CME for registration services) |
|  | Syllabus with cover |
|  | Summary of outcome measures including evaluations, surveys, reports, etc. |
|  | 2 copies of marketing and publicity materials |
|  | Commercial support agreements (if not already submitted) |
|  | Copies of grant and exhibit fee checks and signed exhibitor booth agreement (if not already submitted) |
|  | Completed Commercial Support Tracker (available at https://case.edu/medicine/cme/resources/forms) |
|  | Completed Honorarium & Travel Tracker (available at https://case.edu/medicine/cme/resources/forms) |
|  | Final income/expense reconciliation |