**DOCUMENTATION CHECKLIST**

**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 Mitigation form (if applicable) for each speaker |
|  | Introductory syllabus pages |
|  | Evaluation 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, evaluation form and front matter prior to dissemination |

**The following must be submitted not later than 60 days after the conclusion of the activity:**

|  |  |
| --- | --- |
|  | Original sign-in sheets with first name, last name and credentials, credit claim forms or other evidence of participation. Please also provide a physician and non-physician attendance total. |
|  | Syllabus with cover |
|  | Summary of outcome measures including evaluations, surveys, reports, etc. |
|  | Marketing and publicity materials |
|  | Commercial support agreements and Exhibitor forms (if not already submitted) |
|  | Copies of grant and exhibit fee checks (if not already submitted) |
|  | Completed Commercial Support Tracker |
|  | Completed Honorarium & Travel Tracker with supporting documentation |
|  | Final income/expense reconciliation or financial summary |