



**CME COORDINATOR CHECKLIST**  
ROUNDS/CONFERENCES/OTHER SERIES  
CONTINUING MEDICAL EDUCATION

**PLEASE NOTE:** *CME's Information Webpage* <https://cme.ecu.edu/cme-information-page/> lists the forms required for your series. The forms in **BOLD** below are located on the webpage. Please email [CME@ECU.EDU](mailto:CME@ECU.EDU) with questions.

**BEFORE THE SESSION:**

- ☐ Contact [CME@ECU.EDU](mailto:CME@ECU.EDU) in advance if any session dates are changed or canceled
- ☐ Obtain **DISCLOSURE FORM** completed by speaker/presenter
  - **MUST be obtained & attestation dated PRIOR TO the flyer/email announcement going out**
  - Good for one year from attestation date
  - **If the speaker has a disclosure, contact [CME@ECU.EDU](mailto:CME@ECU.EDU) for the correct wording of the flyer's disclosure statement and for guidance on the mitigation forms/procedure**
- ☐ Obtain speaker/presenter's CV if NOT affiliated with BSOM/ECU, obtain a copy of their CV
- ☐ Obtain speaker's **objectives** and **presentation/content**
- ☐ Create **FLYER** that includes the following:
  - Name of Series & Title of presentation
  - Date
  - Time: Start and End time
  - Location
  - Speaker's full name, credentials, and affiliation
  - Objectives
  - Accreditation statement (current wording is on the **FLYER** template)
  - Credit Statement (current wording is on the **FLYER** template)
  - Disclosure Statement (current wording is on the **FLYER** template)
    - **If a planning committee member or speaker has a disclosure, please contact [CME@ECU.EDU](mailto:CME@ECU.EDU) for the correct wording of the disclosure statement.**
- ☐ Market/advertise/announce the session/series to your target audience by using the **FLYER**
- ☐ Prepare evaluation to distribute at session:  
**RSS Session Evaluation and Coordinator Summary** for Grand Rounds/Journal Club or the **Cancer and Case Conference Evaluation Form** for Cancer and Case Conferences or an online survey
  - If interested in an online survey for your series, please contact [CME@ECU.EDU](mailto:CME@ECU.EDU)
- ☐ Secure access to a computer and E-TRAC barcode scanner, if needed (**E-TRAC Scanner Set-Up**)
- ☐ EXHIBITOR planning to attend? Contact [CME@ecu.edu](mailto:CME@ecu.edu) so we can guide you through ACCME rules

**DURING THE SESSION:**

- ☐ Manage attendee sign-in: E-TRAC scanner or paper sign-in rosters (**Roster Template**)
- ☐ Monitor the webcast (if applicable) and capture the names of the webcast attendees
- ☐ Distribute an evaluation to each attendee
  - Evaluations can be distributed in person or by email (**RSS Session Evaluation and Coordinator Summary** or **Cancer and Case Conference Evaluation Form**)
  - Or, an online evaluation. If interested in using an online survey, please contact [CME@ECU.EDU](mailto:CME@ECU.EDU).
- ☐ For a new attendee or an attendee that doesn't have a CME barcode, please provide the **MyAHEC ACCOUNT INSTRUCTIONS**

### **AFTER THE SESSION:**

- ☐ Collect evaluations and compile the responses on the **RSS Session Evaluation and Coordinator Summary** or save the online survey report
  - **More than 50% of participants must complete the evaluation to be ACCME compliant**
  - Grand Rounds/Lecture and Journal Club series require evaluations per session
  - Cancer and case conferences require evaluations two times per year (**Cancer and Case Conference Evaluation Form**)
- ☐ Complete **Packet Cover Sheet**
- ☐ Obtain series director's signature on the **Packet Cover Sheet**
- ☐ If your series uses E-TRAC:
  - Email [CME@ECU.EDU](mailto:CME@ECU.EDU) to check if a new attendee already has a CME barcode number
  - If new attendee doesn't have a CME barcode#, email them the **MyAHEC ACCOUNT INSTRUCTIONS**
  - Notify [CME@ECU.EDU](mailto:CME@ECU.EDU) after the new attendee creates their MyAHEC account
  - CME will provide you with their CME barcode number
  - **If scanning barcodes or manually entering barcode numbers into E-TRAC after the date of the session:**
    - The session link remains active/visible for 20 calendar days as of the session date
    - **If you add attendees to E-TRAC after the date of the session, please notify [CME@ECU.EDU](mailto:CME@ECU.EDU)**
    - Save E-TRAC roster Excel spreadsheet for your records and to submit it with your RSS CME packet
    - For additional E-TRAC information, see **E-TRAC Instructions**

### **SUBMIT THE CME PACKET TO CME@ECU.EDU:**

- ☐ Completed **Packet Cover Sheet** for your series type
  - Speaker(s) name and affiliation
  - Revenues/expenditures, if applicable (Exhibitor receipt copies are required)
  - Cancer and case conferences: Require minutes/case discussion
  - Series director's signature
- ☐ Speaker(s)/Presenter(s) **Disclosure Form** (attestation dated within one year of the session date)
- ☐ **Attendance Roster:**
  - E-TRAC roster or sign-in roster if not using E-TRAC (**Roster Template**)
  - For instructions on how to save/print the E-TRAC roster, see **E-TRAC Instructions**
- ☐ **RSS Session Evaluation and Coordinator Summary** or **Cancer and Case Conference Evaluation Forms** or summary report from online survey (Cancer & Case Conferences evaluate only twice per year)
  - If interested in using an online survey, please contact [CME@ECU.EDU](mailto:CME@ECU.EDU) for information
- ☐ At least **one completed evaluation** (not required if submitting a summary report from an online survey)
- ☐ **Flyer** (the one you created or **RSS Flyer** or **Cancer & Case Flyer**)
- ☐ **CV** (if speaker/presenter is NOT affiliated with BSOM/ECU, include CV)
- ☐ **Presentation slides/handouts** or **JOURNAL ARTICLES**