



TCT

TRANSPLANTATION &
CELLULAR THERAPY MEETINGSSM
of ASBMT™ AND CIBMTR®

2019 SATELLITE SYMPOSIA SUPPLEMENT

Hilton Americas – Houston, George R. Brown Convention Center
Houston, Texas · February 20-24

Opportunities for Satellite Symposia that offer:

- High-quality sessions unopposed by other scientific meetings
- Strong attendance by physicians and others active in the BMT field
- Opportunities to host mealtime educational sessions



ASBMT

American Society for Blood and Marrow Transplantation

The American Society for Blood and Marrow Transplantation is an international professional membership association of more than 2,200 physicians, investigators and other healthcare professionals promoting blood and marrow transplantation and cellular therapy research, education, scholarly publications and clinical standards. From its beginning, ASBMT activities have been in eight broad areas, representing the interests of transplant clinicians and investigators and the patients they serve: Research; Representation; Clinical Standards; Regulation; Communications; Accreditation; Reimbursement; Recruitment and Training. The 2019 scientific program chair for ASBMT is **Gay Crooks, MD**, UCLA, Los Angeles, CA. More information can be found at www.asbmt.org.



CIBMTR

Center for International Blood & Marrow Transplant Research

The Center for International Blood and Marrow Transplant Research (CIBMTR®), a research collaboration between the National Marrow Donor Program® (NMDP)/Be The Match® and the Medical College of Wisconsin, provides a unique resource of data and statistical expertise to the scientific community for addressing centers that share data on Hematopoietic Cell Transplantation (HCT) and cellular therapy outcomes and a Statistical Center that maintains a clinical database with information for more than 475,000 HCT recipients from over 400 transplant centers in 52 countries. The CIBMTR is a voluntary research organization of basic and clinical scientists collaborating to address important issues in blood and marrow transplantation (BMT) and cellular therapy and uses this information to identify ways to improve transplant outcomes. The 2019 scientific program chair for CIBMTR is **Jane Apperly, MD**, Imperial College, London, UK. More information can be found at www.cibmtr.org.

Please complete and submit the Satellite Symposia Proposal [online now!](#)

Continuing Education

Continuing Medical and Professional Education

The 2019 TCT | Transplantation and Cellular Therapy Meetings of the ASBMT and CIBMTR (TCT Meetings) are sponsored by the Medical College of Wisconsin (MCW). The MCW is accredited by the Accreditation Council for Continuing Medical Education to provide medical education to physicians. Certificates reflecting contact hours for attendance by allied health professionals are provided through the MCW.



TCT Meetings Overview

Annually, the TCT Meetings, formally the BMT Tandem Meetings, is the largest gathering in North America of worldwide experts in blood and marrow transplant patient care, clinical investigation and laboratory research. Satellite symposia are attended by nearly 2,000 physicians, scientists and allied health professionals working in blood and marrow transplantation in BMT programs throughout the United States, Canada and over 30 other countries.

The TCT Meetings have been successful since 1995 when the ASBMT and CIBMTR held their first joint annual meeting. Participants reap the benefits of attending the combined meetings in a single week with economics in travel and lodging costs, less disruption of professional schedules and the opportunity for interaction with a wider circle of colleagues. Registration for the 2019 TCT Meetings is open to members and non-members of ASBMT and/or CIBMTR. Meetings address timely issues in blood and marrow transplantation and recent developments from an experimental and clinical research perspective.

Meeting Format

- Scientific Plenary & Keynote Sessions
- Simultaneous Scientific Sessions
- CIBMTR Working Committee Meetings
- BMT Pharmacists Conference
- Clinical Education Conference (PA-Cs, NPs, etc.)
- Transplant Nursing Conference
- Clinical Research Professionals Data Management Course
- BMT Administrative Director Conference
- Pediatric BMT Educational Track
- BMT CTN Coordinator & Investigator Meetings
- CIBMTR Information Technology Forum

Meeting Agenda and Exhibit Schedule

Exhibits at the 2019 TCT Meetings will be open Wednesday, February 20, through Saturday, February 23. See Exhibit & Support Prospectus at www.asbmt.org or www.cibmtr.org or contact the TCT Meetings Office: TCTMeetings@mcw.edu for information about exhibiting.

More Information Available

Registration, Housing and Abstract forms for the TCT Meetings and continuously updated general information are available online at www.asbmt.org or www.cibmtr.org. Alternatively, contact TCT Meetings Headquarters c/o CIBMTR at the Medical College of Wisconsin, 9200 W. Wisconsin Ave, Ste. C5500, Milwaukee, WI, 53226, USA; TCTMeetings@mcw.edu.

2019 Satellite Symposia Opportunities

Satellite Symposia opportunities are available for the 2019 TCT Meetings. All commercially-supported Satellite Symposia must follow all requirements (sanctions may be imposed for any violation of CME guidelines).

60-Minute Symposia

Breakfast sessions are available from 7:00-8:00 am, Thursday, February 21, through Saturday, February 23, funded by a **\$110,000** educational grant for a stand-alone symposium. Concurrent breakfast sessions are also available for **\$75,000**.

Luncheon sessions are available from 12:30-1:30 pm, Wednesday, February 20 through Saturday, February 23, funded by a **\$130,000** educational grant for a stand-alone symposium. Concurrent luncheon sessions are also available for **\$85,000**.

The grant includes facility rental, CME administration and certificate fees, standard AV (not including ARS) and a full breakfast buffet (food service 7:00-8:30 am) and luncheon buffet (food service 12:00-1:15 pm) for conference attendees.

Enduring Materials:

Blood and Marrow Transplantation Reviews the grant requirement, including turnkey production and distribution is \$65,000. Symposium Proceedings as Digital Webcast on Bloodline: the grant requirement for a digital webcast program, including turnkey production, editing, hosting, and promotion for twelve months is \$60,000. Contact Carden Jennings Publishing, through Marc Weathersby at marc@cjp.com, or via phone at 434-817-2000, x193. More information regarding Enduring Materials in page 5.

Suggested topics recommended by our Scientific Organizing Committee include:

- Cell & Gene Therapy
- Graft Engineering
- Hematologic Malignancies
- Infection
- Lymphoma
- Mobilization
- Pharmacokinetic Monitoring
- Regenerative Medicine
- Cord Blood
- GVHD Management
- Immunotherapy
- Leukemia
- Mesenchymal Stem Cells
- Myelofibrosis
- Post Tx Maintenance
- Target Therapies Post Transplant

Satellite Symposium Proposal

Prior to securing funding, please complete and submit the [2019 TCT Meetings Satellite Symposia Proposal form](#) fields no later than **Friday, July 6, 2018** to obtain highest consideration for the most popular time-slots. The following information must be completed:

- Symposium Title
- Learning objectives
- Documented Needs Assessment
- Proposed Agenda (including suggested faculty of the proposed Symposium)
- Signed Planning Company Agreement Form to Comply with CME Rules and Regulations (pages 11-13)

A joint Organizing Committee for the TCT Meetings and the Medical College of Wisconsin, the CME provider, will review proposals based on documented need(s), content and scientific merit; MedEd companies retain control of content.

Conditional Acceptance

Notification of conditional acceptance will be sent to applicants in August. Upon receipt of acceptance, conditional funding can be sought. Organizations whose proposals are conditionally accepted must forward all requested Symposium details to the TCT Meetings office at TCTMeetings@mcw.edu by **Monday, September 17, 2018** for final approval. Please provide the following information:

- Final agenda
- Confirmed faculty
- Disclosure of Relevant Financial Relationships and Attestation Form for all planning company representatives in a position to control educational content (pages 17-19)
- Satellite Symposia Faculty Audiovisual Recording Consent Form (page 20)
- 2019 Satellite Symposia Budget Form (pages 15-16)
- Pre-Application for Continuing Medical Education (page 14)

Incomplete submissions will not be considered for final approval.

Final Approval

Final approval will be granted to applicants when funding is secured. **Once final approval has been confirmed, changes to the program, agenda or faculty cannot be made without written request and approval by TCT Meetings and MCW.** Sanctions may be imposed for any violation of CME guidelines. For approved Symposia, a contribution to the TCT Meetings in the form of an educational grant is required, based on the enclosed schedule of Satellite Session opportunities. The grant will be used jointly by the ASBMT and the CIBMTR to support educational activities. All Satellite Symposia are required to offer CME credit to attendees through MCW.

Promotional Materials

All promotional materials must be reviewed and approved by TCT Meetings and MCW CME Office by **Friday, January 11, 2019**. To expedite approval of promotional material or for other CME information copy Patti Nelson in the MCW Continuing and Professional Education office at 414-955-4900, e-mail: pnelson@mcw.edu and the TCT Meetings Office: TCTMeetings@mcw.edu prior to January 11, 2019.

MCW Logo

Refer to the Medical College of Wisconsin [CME Requirements](#) regarding identity standards, guidelines for CME Disclosure, and required text for brochures and promotional announcements. Satellite Symposia must not use ASBMT, "CIBMTR", "Statistical Center," "Registry," or "Medical College of Wisconsin," "ACCME" or their respective logos on any announcement, sign, publication, audiovisual product or other promotional material without written permission.

Signage

Signage is the responsibility of the Planning Company. A few (2-3) poster-size signs may be shipped to the meeting in advance, and placed throughout the Convention Center on the day of the Satellite Session. Signs are not to exceed 29"x63" (pop-up banner) or 24"x36" (poster). Easels will be provided. Sign content must be approved in advance by the MCW CME Office. (Note: Signs may not be posted until after the preceding satellite session has ended and must be removed within 1 hour of conclusion of Symposium).

Regarding On-site Logistics/Convention Services

Questions regarding initial planning efforts and scheduling faculty rehearsals prior to symposium may be directed to TCT Meetings Manager (TCTMeetings@mcw.edu), as some restrictions may apply regarding room set-up and other on-site logistics.

On-site Assistance Available

In addition to providing online CME Evaluation Forms for completion following the Satellite Symposium, TCT Meetings will assist with coordinating food and beverage, Standard AV and meeting set-up arrangements with the Convention Services staff at no charge.

For additional on-site assistance, such as receiving and unpacking conference materials, setting up displays and shipping, and arranging for satellite session rehearsal logistics, please contact us at TCTMeetings@mcw.edu. Simple requests will be handled without additional charge.

Enduring Educational Materials

All presentations at the TCT Meetings are the property of its organizers: the ASBMT and the CIBMTR. Any unauthorized reprint, electronic replication or other dissemination of the content of the TCT Meetings is a copyright infringement. These ownership rights apply to the content of satellite symposia, plenary sessions, concurrent sessions, workshops, abstracts and all other scientific presentations.

Within these copyright restrictions, however, the production and dissemination of enduring educational materials based on satellite symposia at the TCT Meetings is encouraged. An enduring educational material can be an ASBMT-branded monograph or digital webcast, or other electronically communicated programs such as a downloadable slide deck or podcast.

The organizers of the TCT Meetings offer a variety of ASBMT-branded formats for enduring educational materials for disseminating satellite symposia presentations well beyond the immediate audience attending a symposium. The cost of these enduring materials can be “bundled” into the fee for support of a satellite symposium.

Blood and Marrow Transplantation Reviews (BMTR) Symposium Proceedings Delivered in Print and Online

A highly effective means of publishing enduring materials is the official ASBMT-branded monograph **Blood and Marrow Transplantation Reviews (BMTR)**. Entering its 28th volume, *BMTR* will create, edit, and publish a review of lectures presented at the TCT Meetings and has a base circulation of approximately 10,000 mailed copies to hematology/oncology medical professionals within the United States and Canada. All printed copies will also be published and made available as a free download online on **Bloodline** (www.bloodline.net), an educational community for hematology/oncology professionals.



The grant requirement, including turnkey production and distribution is **\$65,000**. Budgets are inclusive of writing, copyediting, editorial proofing and review, referencing, printing and distribution, plus faculty honoraria, and CME accreditation by the Medical College of Wisconsin.

For questions about this option, please contact our educational partner, Carden Jennings Publishing, through Marc Weathersby at marc@cjp.com, or via phone at 434-817-2000, x193.

Symposium Proceedings as Digital Webcast on Bloodline (www.bloodline.net)

Another highly effective and interactive means of publishing enduring materials is the official ASBMT-branded digital webcast series published and hosted online on **Bloodline** (www.bloodline.net), an educational community for hematology/oncology professionals.



The grant requirement for a digital webcast program, including turnkey production, editing, hosting and promotion for twelve months is **\$60,000**. Budgets are inclusive of content development, production services, review and testing, online publication, promotion via email blasts, search engine optimization (SEO) services, hosting and data tracking, plus faculty honoraria, and CME accreditation by the Medical College of Wisconsin.

For questions about this option please contact our educational partner, Carden Jennings Publishing, through Marc Weathersby at marc@cjp.com, or via phone at 434-817-2000, x193.

Other Media and Formats

The organizers of the TCT Meetings welcome suggestions and recommendations for other media and formats for disseminating educational materials based on the meetings. Do not hesitate to contact ASBMT or CIBMTR to discuss concepts that you have in mind.

2019 Dates to Remember for Satellite Session Planners

2018

- Friday, July 6 Deadline to submit the Satellite Symposium [Proposal](#) outlining objectives, agenda and faculty
Signed Planning Company Agreement to Comply with CME Rules and Regulations (pgs. 11-13)
- August Notification of conditional acceptance sent to applicants
- Monday, September 17 Final details due, including full agenda, confirmed faculty list with full contact information confirmed via email
Disclosure of Relevant Financial Relationships and Attestation Form for all planning company representatives in a position to control educational content (pgs. 17-19)
Satellite Symposia Faculty Audiovisual Recording Consent Form (pg. 20)
Budget Form and Guidelines for Budgeting (pgs. 15-16)
Pre-Application for Continuing Medical Education for Satellite Symposia (pg. 14)
- Monday, November 19 No refund if Satellite Symposium is cancelled after this date
- Friday, December 14 Balance of grant due with signed Final Letter of Agreement

2019

- Friday, January 11 All promotional material must be approved by MCW CME
- February 20-24 **2019 TCT | Transplantation & Cellular Therapy Meetings of ASBMT and CIBMTR**
- Monday, March 25 Full expense report due
Faculty reimbursement form with full disclosure (pg. 21)
- Monday, April 15 All invoices must be paid in full

Please complete and submit the Satellite Symposium Proposal [online now!](#)

Forms Included

- Pages 9-10 **Sample Confirmation Letter**
- Pages 11-13 **Planning Company Agreement to Comply with CME Rules and Regulations**
- Page 14 **Pre-Application for Continuing Medical Education for Satellite Symposia**
- Pages 15-16 **Budget Form and Guidelines for Budgeting**
- Pages 17-19 **Disclosure of Relevant Financial Relationships and Attestation Form for all planning company representatives in a position to control educational content**
- Page 20 **Satellite Symposia Faculty Audiovisual Recording Consent Form**
- Page 21 **Faculty Reimbursement Form**
- Pages 22-24 **ACCME Guidelines**

Sample Confirmation Letter

(sent to Satellite Symposium speakers by Medical Education Company on behalf of the CME provider, the Medical College of WI)

Template Instructions:

- 1) Shaded sections are required; however, the actual shading can be removed for formatting purposes.
- 2) Other sections are to remain included as appropriate to the activity and faculty member.
- 3) Additional instructions and checklists may be supplemented to this letter as needed.
- 4) Remember to remove this instruction box in the final letter.
- 5) Final faculty letters must receive approval by MCW prior to distribution.

<Month Date, Year>

<First Name Last Name, Degree>

<Organization>

<Street Address>

<City, State Zip code>

Dear <Degree. Last Name>:

Thank you for agreeing to serve on the faculty of the upcoming continuing medical education activity, entitled <Activity Name> that will be held **February XX, 2019** during the 2019 TCT | Transplantation and Cellular Therapy Meetings of ASBMT and CIBMTR (formerly the BMT Tandem Meetings) at the **Hilton Americas Houston, Houston, Texas**. This CME activity is directly sponsored by the Medical College of Wisconsin Office of Continuing Professional Development.

The title(s) of your presentation(s) is/are <Presentation Title(s)>.

The scheduled date(s) of your presentation is/are: <Scheduled Date(s)>

The scheduled start and end time(s) of your presentation(s) are: <Insert Times>

The target audience for this activity is <target audience(s)>.

The overall activity objectives are:

- <Overall activity objectives>

Your stipend for this presentation is: \$<enter dollar amount> plus expenses <delete if no stipend>

The commercial supporter(s) for this activity, as of today's date, is/are: <enter names of commercial supporter(s)>

ACCME Standards for Commercial Support

As an accredited CME provider, the Medical College of Wisconsin requires that its presenters comply with the ACCME *Standards for Commercial Support of CME*. If a commercial interest is supporting this CME activity, we will disclose that information to our participants.

As faculty for this CME activity, you are required to do the following:

- Disclose any personal financial relationship(s) that you or your spouse/partner has/had over the past twelve months with any commercial interest(s).
- Design a presentation that is independent, objective, scientifically rigorous and free of commercial influence.
- Ensure that scientific studies utilized or referenced in your presentation are from sources acceptable to the scientific and medical community.
- Limit diagnostic and therapeutic recommendations to those that are supported by the best scientific and/or medical evidence available.

In addition, the Medical College of Wisconsin requests that you inform the audience whenever you discuss unlabeled or unapproved uses of drugs or devices.

As such, we ask that you complete the Disclosure of Commercial Relationships and Attestations Form. The Medical College of Wisconsin will use this information to identify any potential conflicts of interest. If a conflict of interest is found, measures to resolve the conflict will be employed prior to the start of the CME activity.

Please note that the ACCME rules require all CME providers to disqualify planners, authors, and speakers who do not supply this information.

<DATE>

Page 2

Incorporating tools and strategies into your presentation

To maximize this learning opportunity for our participants, please consider the overall objectives for your presentation and include the most current evidence-based medical information based on national guidelines and literature reviews on your topic. In addition, please incorporate any strategies and tools that you believe will aid participants in applying new information into practice in order to change clinical competence, performance and/or patient outcomes.

Presentation Materials

It is the policy of the Medical College of Wisconsin to use generic, scientific names of medications and medical devices wherever possible and practical to promote impartiality. If a trade name of a medication is used in a CME activity, the first reference for all medications discussed in the activity should include the generic name together with the trade name, and subsequent references should use only the generic name.

Presentation materials are due to Medical College of Wisconsin **NO LATER THAN January 11, 2019**. It is critical that you send this material by that date in order to allow sufficient time for review and syllabus preparation.

Presentation Objectives

Presentation materials should include the objective(s) for your presentation. The objective(s) should be measurable and designed to provide the participant with information, reference, tools and strategies that can be applied in their practice to improve patient outcomes.

Audiovisual Equipment

A PC laptop, LCD projector, laser pointer, and a lavalier microphone will be available at the conference. If you require additional AV equipment, please contact me directly.

Travel Arrangements and Hotel Accommodations <Delete if not applicable>

Please make your own travel arrangements. The Medical College of Wisconsin can only reimburse you for economy class tickets. I will make a hotel reservation in your name at **<Insert Location>** once you provide me with your arrival and departure dates OR I will make a reservation in your name at **<Insert Location>** for arrival on XXXX and departure on XXXX.

Additional CME instructions or checklists for faculty are enclosed as a supplement to this letter.

Once again, thank you for your willingness to participate in this CME event. If I can be of any additional help, or can clarify any of the above statements, please contact me via phone at **<123-456-7890>**, fax **<123-456-7890>** or e-mail **<your email address here>**.

With best regards,

<Your Name>

<Your Title>

Enclosures: **<insert list of enclosures>**



2019 TCT | Transplantation & Cellular Therapy Meetings of ASBMT and CIBMTR Planning Company Agreement to Comply with CME Rules and TCT Meetings Regulations

Return this form to TCTMeetings@mcw.edu or fax 414-805-0713.

Purpose of Satellite Symposia at the TCT Meetings

The purpose of Satellite Symposia at the TCT Meetings is to bring useful, up-to-date, scientifically accurate, balanced, unbiased information to blood and marrow transplantation and cellular therapy clinicians and investigators.

All aspects of a Satellite Symposium must flow from this single purpose. Anything that interferes with that purpose must be excluded from the Satellite Symposium.

CME Rules and TCT Meetings Regulations

The following rules and regulations have been developed for all independent planning companies, medical communications companies, meeting planning companies and other entities (hereafter called “Planning Company”) that assist with the development and implementation of a Satellite Symposium.

The Medical College of Wisconsin CME Office is available to serve as a Planning Company. Contact Linda D. Caples, MBA, Director, Office of Continuing and Professional Education at lcaples@mcw.edu, phone: 414-455-4900.

1. An authorized representative of the Planning Company must sign this “Planning Company Agreement to Comply with CME Rules and TCT Meetings Regulations” before final approval of a Satellite Symposium is granted.
2. A Planning Company becomes an agent of the continuing medical education (CME) provider and must be approved by the Medical College of Wisconsin. The exclusive CME provider for the TCT Meetings is the Medical College of Wisconsin (MCW).
3. Planning Companies that fail to comply with CME guidelines may have sanctions imposed, up to and including exclusion from further participation in the TCT Meetings and/or future TCT Meetings and/or activities in which MCW acts as CME Provider.
4. The Medical College of Wisconsin, as CME provider, makes all decisions regarding Satellite Symposium content, faculty, venue, printed collateral materials and all other aspects of the symposium, consistent with the policies and requirements of the Accreditation Council for Continuing Medical Education (ACCME). Once approved, changes to the program agenda or faculty cannot be made without written request and approval by MCW.
5. Upon presentation at the TCT Meetings, the Satellite Symposium program and its content become the property of TCT Meetings and are governed by the Medical College of Wisconsin as CME provider.
6. Planning Company must comply fully with ACCME Standards for Commercial Support (see pages 22-24).
7. The Satellite Symposium must provide an opportunity for an open question and answer session and permit evaluation by attendees. Online Evaluation Forms will be developed, distributed and tabulated by the TCT Meetings in compliance with established CME guidelines. A summary of completed evaluations, including written comments, will be provided after the TCT Meetings.
8. If an unlabeled product or an unapproved use of a product is discussed during the Satellite Symposium, it must be disclosed to the symposium audience that the product is not approved for the particular use in the United States. The Satellite Symposium content must be fair, balanced, scientifically valid and comply with current U.S. Food & Drug Administration guidelines. Any treatment recommendations must be made based on the best available evidence.

**2019 Planning Company Agreement
to Comply with CME Rules and TCT Meetings Regulations**

2019 TCT Meetings | Hilton Americas Houston & George R. Brown Convention Center | Houston, Texas

Page 2

9. Full expense report, including receipts and faculty reimbursement form (pg. 21) with full disclosure due by **Monday, March 25, 2019**.
10. Additional costs, including on-site charges, will be billed after the TCT Meetings. All invoices must be paid by **Monday, April 15, 2019**, or will incur a 20% late fee and organizers may be ineligible for future Satellite Symposia submissions.
11. If the Symposium is cancelled after **Monday, November 19, 2018**, there will be no refund to the Planning Company.
12. TCT Meetings strongly recommends that stipends for faculty and their expenses be paid by the Planning Company. To facilitate this, a joint sponsorship agreement must be signed by MCW as the CME Provider delegating fiduciary responsibility to the Planning Company. A letter of request must be submitted to MCW CME with a copy to TCT Meetings by **Monday, November 19, 2018**. Any payment or reimbursement by the Commercial Supporter directly to a symposium speaker, moderator or chair is strictly forbidden. To comply with CME regulations, all symposium-related expenditures by the Planning Company and the Commercial Supporter, as well as any of their agents, must be disclosed to the TCT Meetings and MCW. Full accounting of all symposia-related expenses must be provided to the TCT Meetings within 30 days after the adjournment of the Meetings.
13. All monies and fees associated with a Satellite Symposium are strictly regulated in accordance with ACCME Standards for Commercial Support (pgs. 22-24). A violation may place the CME accreditation of a symposium in jeopardy. As a general rule, all monies and fees including the base grant (which covers facility rental, CME administration, standard AV and food service), must be paid to TCT Meetings, which in turn is responsible for disbursing those funds. Checks should be payable to the Medical College of Wisconsin. The only exceptions to this rule, which must be pre-approved in writing by the TCT Meetings and the CME Office of the Medical College of Wisconsin are (a) stipends for faculty, the meeting registration fee and actual travel costs for symposium faculty who may be reimbursed for these expenses by the Planning Company (but not directly by the commercial supporter) and (b) fees and expenses paid by the Commercial Supporter to and for the services of the Planning Company and/or creative services providers.
14. Reimbursements to individuals on U.S. tourist/business visitor visas must comply with the regulations set forth by the US Internal Revenue Service (IRS) and the Medical College of Wisconsin, and taxes may be withheld pursuant to prevailing regulations. The approximately 30% U.S. tax charged against stipends for speakers who are non-U.S. citizens will be funded by the commercial supporter, not by the TCT Meetings, however, MCW *must have* knowledge of all payments. (For questions regarding special forms required for invited faculty who are not U.S. citizens, contact us at TCTMeetings@mcw.edu.)
15. Education is the primary purpose of a Satellite Symposium. Food and beverage must be modest and a secondary element in organizing and publicizing the symposium.
16. All Satellite Symposium planning (including set-up, food and beverage, audiovisual services and other arrangements) must be made through and handled by the meeting manager for the TCT Meetings, unless other arrangements are agreed upon to allow the Planning Company to relate directly with the convention services staff. The meeting manager for the TCT Meetings may be reached at TCTMeetings@mcw.edu. When alternate arrangements are approved, the Planning Company must keep the meeting manager for the TCT Meetings fully informed of all communications with the hotel, resort or convention services staff.
17. Audiovisual technicians are required for all Satellite Symposia. All on-site audiovisual services, including projection during the symposium, are provided by the TCT Meetings. Only by prior agreement with the meeting manager for the TCT Meetings and in special circumstances may a Planning Company, a Commercial Supporter or their agent be permitted to provide on-site audiovisual services or projection for a Satellite Symposium.

**2019 Planning Company Agreement
to Comply with CME Rules and TCT Meetings Regulations**

2019 TCT Meetings | Hilton Americas Houston & George R. Brown Convention Center | Houston, Texas

Page 3

18. No audio, video or other recording of a Satellite Symposium is permitted without consent of the TCT Meetings. Any permitted audio, video or other recording must be made clearly evident to the audience.
19. The Planning Company must provide on-site staff to assist with any invited faculty needs, handout materials and other last-minute arrangements, logistics and traffic flow.
20. The creation and distribution of enduring materials based on Satellite Symposia is encouraged, but is governed by the "Requirements for the Development and Distribution of Enduring Education Materials from the TCT Meetings." A copy of the requirements can be obtained from the ASBMT or the CIBMTR Executive Offices (or see pages 5 and 6).
21. The Planning Company and the Commercial Supporter may not post on-site promotional signs in the hotels or convention center lobbies without permission of the TCT Meetings. Placing promotional materials under the doors of hotel guest rooms (or "door drops" of any kind) is not permitted. A door drop opportunity is available. See www.asbmt.org or www.cibmtr.org for details and a rate card.
22. The Planning Company and the Commercial Supporter may not use "American Society for Blood and Marrow Transplantation", "ASBMT," "Center for International Blood & Marrow Transplant Research," "CIBMTR," "International Bone Marrow Transplant Registry," "Autologous Blood and Marrow Transplant Registry," "IBMTR," "ABMTR," "Registry," "Statistical Center," "Medical College of Wisconsin," "MCW," "ACCME," "Hilton Americas-Houston" or their respective logos on any announcement, sign, publication, audiovisual product or other promotional material without written permission. All promotional material must be approved by the TCT Meetings and MCW CME Office prior to distribution and no later than **Friday, January 11, 2019**. Promotional materials received after January 14, 2019 may not be considered or authorized.

By signing this "Planning Company Agreement To Comply with CME Rules and TCT Meetings Regulations," I certify that I have read and understand these rules and regulations and that I am an authorized agent of the company named below who can bind the company to compliance with these requirements as a condition of participation in the TCT Meetings.

_____ Date: _____

Signature of Planning Company Representative

Print Name: _____

Title: _____

Name of Planning Company: _____

Address: _____

Phone: _____ Fax: _____

Email: _____



2019 TCT Meetings

Pre-Application for Continuing Medical Education

Please return this form by **Monday, September 17**, to TCT Meetings by email: TCTMeetings@mcw.edu or fax: 414-805-0713. Attach additional pages as needed.

Title: _____

Proposed Date: _____, **2019**

Estimated hours of instruction: **1.0**

Submitted by:

Name(s): _____

MedEd Co: _____

Phone: (____) _____

E-mail: _____

Collaborating Organizations (if applicable):

Attach list of all faculty with professional and academic titles, full address, telephone, fax and email address.

Synopsis:

What is the clinical/research/teaching/administrative issue you want to address?

Why is this an issue? (Answer in terms of knowledge, competence and/or performance)

What is it that you want to change amongst the many variables of that are causing the issue?

How will you know you were effective in producing that change?

LEARNING OBJECTIVES:

List 3 or more objectives that address the identified need

At the conclusion of this activity, I will be able to:

GENERAL REFERENCES:

3-4 relevant references that support the needs assessment

BUDGET

A copy of the proposed budget (refer to enclosed Guidelines) should be submitted with this worksheet. Be sure to specify proposed speaker stipends and travel expense allowances.

EVALUATION

Evaluation Forms will be distributed to all meeting participants by TCT Meetings on-site with meeting registration materials. Comments will be taken into consideration when determining future venues and meeting format. Participants will receive CME credit based only on educational and satellite sessions actually attended and evaluated. NOTE: Organizers of the TCT Meetings will coordinate the required evaluation process associated with CME accreditation. Suggestions for evaluation questions and/or format will be taken into consideration for each Satellite Session. Please contact the TCT Meetings office (TCTMeetings@mcw.edu) with questions/suggestions.

Sanctions may be imposed for violation of any CME guidelines, which could result in probation or banning corporation and/or faculty member(s) from future participation in TCT Meetings Satellite Symposia with CME accreditation.

2019 Satellite Symposium Budget Form

See Guidelines for Budgeting & Faculty Reimbursement (attached). Please forward completed form by **Monday, September 17, 2018** to the TCT Meetings Conference Office at TCTMeetings@mcw.edu or fax: 414.805.0713.

Planning Company Representative: _____

Name of Commercial Supporter (Organization): _____

Planning Company Mailing Address: _____

Phone: _____ Fax: _____ E-mail: _____

Satellite Symposium Title: _____

EDUCATIONAL BASE GRANT – includes facility rental, CME administration, standard AV and food service, due in full by Friday, December 14, 2018. Deposit of 50% due Monday, November 19, 2018.

ANTICIPATED EXPENSES – to be reconciled after the Meeting:

*TCT Meetings recommends stipends for US citizens and travel expenses for all speakers be paid by the Planning Co.

ANTICIPATED CHAIR & FACULTY STIPENDS*- MCW suggested stipends amount per speaker: \$500.

\$ _____ Chair Stipend [] check if chair is a US citizen
 \$ _____ Faculty Stipends (\$ _____ x _____ # of US speakers; \$ _____ x _____ # of non-US speakers)
 \$ _____ **Total Faculty Stipends** (Chair stipend + faculty stipends)

ANTICIPATED CHAIR & FACULTY EXPENSE Check if expenses will be paid by Planning Company (see below)

\$ _____	Conference Registration Fees	<input type="checkbox"/>
\$ _____	Hotel	<input type="checkbox"/>
\$ _____	Coach Airfare	<input type="checkbox"/>
\$ _____	Ground Transportation	<input type="checkbox"/>
\$ _____	Tolls and Parking	<input type="checkbox"/>
\$ _____	Mileage @ \$0.545/mile (current April 2018)	<input type="checkbox"/>
\$ _____	Meals	<input type="checkbox"/>
\$ _____	Other Expense	<input type="checkbox"/> specify: _____
\$ _____	Other Expense	<input type="checkbox"/> specify: _____
\$ _____	TOTAL	

ANTICIPATED MISCELLANEOUS SYMPOSIUM MANAGEMENT EXPENSE

\$ _____ Meeting Management Company Fees & Travel
 \$ _____ Creative Development (Printing/Publications)
 \$ _____ Other Expense, specify: _____
 \$ _____ Other Expense, specify: _____
 \$ _____ **TOTAL**

***Planning companies are strongly encouraged to obtain permission to prepay speaker expenses including travel and housing for all speakers and stipends for U.S. citizens, whenever possible to simplify accounting. If travel and/or housing is not prepaid, original ticket stubs with the original credit card statement used to pay for the travel and/or housing must be submitted before reimbursement can be made, per Medical College of Wisconsin travel reimbursement policies.** Missing documentation for expenses will delay reimbursement and may result in tax consequences. All other expenses associated with the cost of the Satellite Symposium including those payable to independent meeting management service providers or for creative development, printing and publication costs, should, after approval from MCW, be paid directly by the Commercial Supporter. Full budgetary disclosure is required under CME regulations and detailed reconciliation and documentation is required.

Guidelines for Budgeting & Faculty Reimbursement

Please use the following guidelines when preparing your Satellite Symposium budget and inviting faculty to present.

COMMUNICATION WITH INVITED FACULTY

A list of all faculty, with professional and academic titles, full address, telephone, fax and email address and administrative assistant email addresses must be sent to TCT Meetings Conference Office at TCTMeeting@mcw.edu; fax: 414.805.0713 prior to [Monday, September 17, 2018](#). Copies of initial invitation letters sent by the Commercial Supporter or Planning Company to faculty should be included. Please refer to the enclosed sample confirmation letter for CME-related verbiage that should be included in your letter to invited faculty.

Planning companies, after obtaining TCT Meetings and Medical College of Wisconsin (MCW) approval, are strongly encouraged to prepay travel and housing expenses and stipends for all speakers, whenever possible to simplify accounting.

Each planning company will need a letter from MCW as the CME Provider delegating fiduciary responsibility. Please submit a letter of request to TCT Meetings Conference Office by [January 11, 2019](#). If travel and/or housing costs are not prepaid, original ticket stubs and an original credit card statement used to pay for the travel and/or housing must be submitted before reimbursement can be made, per MCW travel reimbursement policies. Missing documentation for expenses may result in delayed reimbursement and tax consequences. All other expenses associated with the cost of the Satellite Symposium including those payable to independent meeting management service providers or for creative development, printing and publication costs, should be paid directly by the Planning Company, after obtaining MCW approval to do so. Full budgetary disclosure is required under CME regulations and detailed reconciliation and documentation is required.

After the meeting, faculty will submit a Satellite Symposium Faculty Reimbursement Form (enclosed on page 21) to the planner for signature, indicating approval of reimbursable expenses which have not been prepaid. The Travel Reimbursement Form with **original** (no photocopies) receipts for expenses and ticket stubs with original credit card receipts (if not prepaid) will then be forwarded to TCT Meetings by the representative for payment.

STIPENDS

Suggested stipends amount per speaker: **\$500**. Stipends are discretionary; however, the MCW policy requires written pre-approval for stipend payments exceeding \$1,500 to any one person. Planning companies are strongly encouraged to

pay speaker stipends, after obtaining TCT Meetings and Medical College of Wisconsin approval.

CONFERENCE REGISTRATION FEES

See www.asbmt.org or www.cibmtr.org for online registration. Satellite Symposia planners are exempt from paying the conference registration fee. Satellite Symposia Faculty must be registered for the TCT Meetings.

AIR TRAVEL

Full coach should not exceed \$1,000 for domestic and business class fare should not exceed \$5,000 for international tickets. Travel coordination should be done by the Planner/Commercial Supporter as early as possible to attain lowest fares.

GROUND TRANSPORTATION

Ground transportation (taxi, airport shuttle, etc.) should be reimbursed at actual cost.

HOTEL ACCOMMODATIONS

Hotel expense should be covered for a maximum of two nights: the night of the scheduled presentation and either the night before or immediately after, not to exceed \$300/night. Please make hotel reservations using the online housing reservation system, which will be made available on the registration confirmation email.

MEALS/PER DIEM

Meals should be reimbursed with original receipts for a maximum of three days: the day of travel to the meeting, the day of the scheduled presentation and the day of travel home. The Medical College of Wisconsin recommends that meals do not exceed \$59 per day.

AUDIOVISUAL REQUIREMENTS

Cost of standard audiovisual rentals and technical support staff is included in the educational base grant. Additional AV expenses, such as use of Audience Response Systems (ARS) are not included in the base grant and are the responsibility of the Planning Company.

ADA

Please keep in mind that the Americans with Disabilities Act (ADA) mandates that TCT Meetings, including all Satellite Symposia, must be completely accessible to all participants and faculty. Please contact the TCT Meetings Conference Office at TCTMeetings@mcw.edu **IMMEDIATELY** regarding any faculty member requiring special accommodation.

Satellite Symposium Disclosure of Commercial Relationships and Attestations

Title of Accredited Activity: 2019 TCT Meetings | Transplantation and Cellular Therapy Meetings of ASBMT and CIBMTR – Satellite Symposia

Name (speaker, author, teacher, planner): _____

Role in the Activity: planner speaker reviewer monitor

Title of Speaker’s Presentation: _____

Date of Activity: February 20-24, 2019 **Program ID:** #19000

If you indicate on this form that you have commercial interests, you are asked to discuss with the Activity Director how a possible conflict of interest will be resolved.

First, list all the names of commercial interests (see last page for definition) with which you or your spouse/partner have, or have had a relationship within the past 12 months or know you will have in the future, whether you think they relate to the presentation or not. Or check the No box below if you have no commercial interests. Proceed to the attestation on the second page.

Second, describe what you or your spouse/partner received (i.e., salary, stipend, etc). The Medical College of Wisconsin, Inc. does **NOT** want to know how much you received.

Third, describe your role.

Example terminology

What was received: Salary, royalty, intellectual property rights, consulting fee, stipends, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit and/or patents.

Role(s): Employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities (please specify).

Name of Commercial Interest	Nature of Relevant Financial Relationship (Include all those that apply)	
	What was received	For What Role?
<i>Example: XYZ Pharmaceuticals</i>	<i>Stipend</i>	<i>Speaker</i>
	I do not have any relevant financial relationships with any commercial interests.	

Date Form Completed: _____

By: _____

Any details you can provide below about how your work with the commercial interest(s) does or does not relate to the content of your presentation will greatly help the CME Office with the process of resolving any possible conflict of interest and approving your talk. For example, there would be no conflict of interest for someone who has received compensation for a presentation on a drug for acid reflux when their talk for the CME event will be on colitis.

MCW Expectations: Please indicate your understanding of, and willingness to comply with, each statement below by checking the appropriate box. If you have any questions regarding your ability to comply, please contact us at thank as soon as possible. No alterations may be made to this form.

- Agree** The content and/or presentation of the information with which I am involved will promote quality or
- Disagree** improvements in healthcare and **will not** promote a specific proprietary business interest of a commercial interest. Content for this activity, including any presentation of therapeutic options, will be well-balanced, unbiased and based on best available evidence.

- Agree** I have not, and will not accept any honoraria, additional payments or reimbursements beyond that
- Disagree** which has been agreed upon directly with the Medical College of Wisconsin (MCW).
- N/A**

- Agree** I understand that MCW may need to review my presentation and/or content prior to the activity, and I will
- Disagree** provide educational content and resources in advance as requested.

- Agree** If I am presenting at a live event, I understand that a CME monitor may be attending the event to ensure
- Disagree** that my presentation is educational, and not promotional, in nature.

- Agree** If I am providing recommendations involving clinical medicine, they will be based on evidence that is accepted
- Disagree** within the profession of medicine as adequate justification for their indications and contraindications in the care of patients. All scientific research cited in support of patient care recommendations will conform to the generally accepted standards of experimental design, data collection and analysis. I will convey the limitations of the content being taught and the severe and most common risks of treatments that are discussed.

- Agree** If I am discussing specific health care products or services, I will use generic names to the extent possible.
- Disagree** If I need to use trade names, I will use trade names from several companies when available, and not just trade
- N/A** names from any single company.

- Agree** If I am discussing any product use that is off label, I will disclose that the use or indication in question
- Disagree** is not currently approved by the FDA for labeling or advertising.
- N/A**

- Agree** If I have been trained or utilized by a commercial entity or its agent as a speaker (e.g., speaker's bureau)
- Disagree** for any commercial interest, the promotional aspects of that presentation will not be included in any way
- N/A** with this activity. If I am presenting research funded by a commercial company, the information presented will be based on generally accepted scientific principles and methods, and will not promote the commercial interest of the funding company.

I have carefully read and considered each item in this form, and have completed it to the best of my ability.

Signature: _____ Date: _____

Return this completed form to the BMT Tandem Conference Office by email TCTMeetings@mcw.edu or fax to 414.805.0713.

This is a different form from the one required of MCW faculty each year or for research grants. There are specific requirements of the Accrediting Council for Continuing Medical Education (ACCME).

The purpose of this form is to identify possible conflicts of interest and address them prior to the meeting.

Circumstances create a conflict of interest when an individual has an opportunity to affect CME content about products or services of a commercial interest with which he/she has a financial relationship.

Glossary of Terms

Commercial Interest

The ACCME defines a “commercial interest” as any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. Companies that provide direct patient care such as hospitals and for-profit nursing homes, tissue/blood banks, non-profit or government organizations and non-health care related companies such as publishers are not considered commercial interests for CME purposes.

Relationships

Relationships include financial relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, stipend, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. Unpaid advisory board positions and research money or patents given to an institution on an individual’s behalf are also considered relevant relationships by the ACCME.

Relevant relationships

The ACCME focuses on financial relationships with commercial interests in the 12-month period preceding the time that the individual is being asked to assume a role controlling content of the CME activity. Known future relationships are also relevant. There is no minimal amount for relationships to be significant and unpaid advisory board positions are considered relevant.

Relationships which are deemed relevant to being a planner or presenter at this meeting will be disclosed to the audience/participants.

Patents

If a patent is owned by an individual, it is a relevant item and creates a relevant financial relationship. This must be disclosed to the audience by referring to the owner of the patent by name and a description of what the patent is for.

2019 TCT Meetings

Satellite Symposia Faculty Audiovisual Recording Consent Form

Faculty Member Name: _____

Satellite Symposium: _____

Commercial Supporter: _____ Date/Time of Program: _____

RECORDING YOUR SESSION

You (a Presenter at the TCT Meetings) hereby agree and guarantee that you solely own the intellectual property rights to any material you provide in your presentation, and/or have the appropriate permission to provide the same during your presentation and are not in any way prohibited from agreeing to the terms herein. You understand and agree this guarantee applies to your presentation and the materials you use during the same regardless of whether you agree below to allow the TCT Meetings and its organizers to audio or video record your presentation. In presenting/speaking at the TCT Meetings, you give the meeting organizers, the ASBMT and the CIBMTR, an unlimited non-exclusive license to use, reprint, copy, post on the organizers' website(s), distribute and/or edit any material you include in your presentation, in any format the meeting organizers so choose, including handouts, photograph or film. This non-exclusive license applies to the content you provide in any plenary sessions, concurrent scientific sessions, workshops, oral abstract presentations, poster presentations, abstracts and all other scientific presentations. Any unauthorized or unlawful reprint, electronic replication or other dissemination of the content of the TCT Meetings is a copyright infringement.

Presentations in the TCT Meetings may be recorded for distribution by TCT Meetings, unless specifically asked not to by you. Presenters understand the presentations/talks will be disseminated electronically. All appropriate speaker forms must be completed in advance by all speakers.

Audiotape and Videotape Permission

- My signature below indicates my approval of TCT Meetings organizers to produce, duplicate and distribute a recording of my presentation and any related handouts or materials provided therein, and that I will not receive any of the proceeds of the sales of the recordings.**

All recordings become the property of TCT Meetings.

Signature of Faculty Member

- Please do not audio or video record my presentation or post materials for distribution.**

Credit for Attendance or Teaching

Faculty requesting continuing medical education (CME) credits, or continuing education units for pharmacists or allied health professionals are reminded to submit appropriate attendance and evaluation forms within 30 days of the completion of the conference. Speakers may request to be awarded *AMA PRA Category 1 Credits™* for the preparation and delivery of their own talks consistent with prevailing policies of the AMA. A special form has been developed for this purpose and is available at www.ama-assn.org/go/cme.

2019 Satellite Symposium Faculty Reimbursement Form

Instructions for Faculty: Please complete this Form and forward it to your Satellite Symposium Planner representative for signature, along with original (not photocopies, faxes or emails) receipts, ticket stubs and credit card statements, if applicable. YOUR CHECK CANNOT BE PROCESSED WITHOUT YOUR SIGNATURE AND THE SIGNATURE OF THE PLANNER AT THE BOTTOM OF THIS PAGE.

Your Planner Representative is: _____ Phone: _____

Satellite Symposium: _____

Commercial Support Organization: _____ Date of Program: _____

Approved Amount of Stipend: \$ _____

Check if you **do not** have travel expenses to submit to TCT Meetings; skip to section "Make Check Payable to"
If you have travel expenses to submit, please complete the information in the box below and remainder of this Form.

Reimbursement Policy: Stipends may be paid on-site for U.S. speakers if we have your Form W9 on file 30 days prior to the conference. Planning companies are strongly encouraged to obtain permission to prepay or reimburse for speaker travel and housing costs to simplify accounting. Reimbursement for travel and housing expenses not prepaid by the planning company will be disbursed by TCT Meetings/Medical College of Wisconsin (MCW) within 3-4 weeks of receiving the completed Satellite Symposium Faculty Reimbursement Form with original travel receipts, ticket stubs and credit card statements. Emailed and faxed receipts or photocopies are not considered originals and will not be accepted as proof of payment by MCW. Faculty and planner/commercial supporter signatures (below) are required for reimbursement. Stipends checks not cashed within 6 months of issue date will be considered void.

Instructions for Planner/Commercial Supporter Representative: Please document any expenses prepaid or reimbursed in the box below, to the right of the check boxes. Your signature on this Form indicates acknowledgment of expenses incurred and approval for reimbursement of expenses to Faculty. Please mail this Form (requires two signatures) and original receipts (not photocopies) to TCT Meetings Headquarters, c/o CIBMTR, Medical College of Wisconsin, Suite 2500, 9200 W. Wisconsin Ave, Ste C5500, Milwaukee, WI, 53226, USA.

FOR REIMBURSEMENT OF STIPEND PLUS TRAVEL EXPENSE:

REMINDER: Stipends cannot be prepaid or reimbursed by the Commercial Supporter.

\$ _____ Stipend	<input type="checkbox"/> prepaid by: _____ \$ _____
\$ _____ Conference Registration Fee	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Hotel	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Coach Airfare	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Ground Transportation	<input type="checkbox"/> prepaid/reimbursed by: _____ \$ _____
\$ _____ Tolls and Parking	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ Mileage _____ miles @\$0.545 (as of April 2018)	<input type="checkbox"/> reimbursed by: _____ \$ _____
from: _____ to: _____	
\$ _____ Meals	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ Other, specify: _____	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ Other, specify: _____	<input type="checkbox"/> reimbursed by: _____ \$ _____
\$ _____ TOTAL STIPEND PLUS EXPENSE	

Make Check Payable to: _____

Social Security# or Tax ID# (Check one only, and provide number): _____

Institution/Department: _____

Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Phone: _____ Fax: _____ E-mail: _____

(Home Address required for US citizens by IRS): _____

City: _____ State: _____ Zip: _____

Mail check to: Office address Home address

Faculty Signature: _____ Date: _____

PLANNING INSTRUCTIONS FOR YOU AS A CME FACULTY MEMBER

Planning a CME activity is often a complex process that includes an understanding of professional practice gaps, the underlying educational needs, and the desired results of the CME activity. The information below will assist you, as an instructor, in completing this process:

1. *Planning Educational Content Relative to Patient Safety and Systems Barriers*

The Institute of Medicine and other national bodies have identified patient safety issues as being critical to the quality of medical care in the United States. Toward that end, we are requesting that you address any patient safety issues that are applicable. In addition, research has shown that there are often “system barriers”¹ that learners encounter when they return to their practice environment. These barriers prevent participants from implementing what they have learned at CME activities. As you develop the content of your presentation, please be aware of these potential barriers and address them in your presentation.

2. *Compliance with U.S. and International Intellectual Property Laws and Treaties*

In order to comply with U.S. and international intellectual property laws and treaties, instructors are required to identify graphics and other information used in a CME presentation that are protected by copyright and properly acknowledge the source of the cited material in a footnote on the slide. Should the material be further used in an enduring material, the source of the footnote will be contacted in order to obtain written release for the use of the material in question.

3. *Compliance with HIPAA Regulations*

Patient confidentiality falls under the Health Insurance Portability and Accountability Act (HIPAA). As such, please ensure that your presentation is free of any information that would allow a specific person to be identified. Should you decide to utilize case studies, images, or video vignettes that could violate patient confidentiality, a written release must be on file with the Medical College of Wisconsin.

¹ Examples of system barriers include reimbursement issues, managed care rules, formulary decisions, contradicting practice guidelines, etc.



Published on *Accreditation Council for Continuing Medical Education* (<http://www.accme.org>)

Standards for Commercial Support: Standards to Ensure Independence in CME Activities

Standard 1: Independence

Standard 1.1 A CME provider must ensure that the following decisions were made free of the control of a commercial interest. (See www.accme.org for a definition of a "commercial interest" and some exemptions.)

(a) Identification of CME needs; (b) Determination of educational objectives; (c) Selection and presentation of content; (d) Selection of all persons and organizations that will be in a position to control the content of the CME; (e) Selection of educational methods; (f) Evaluation of the activity.

Standard 1.2 A commercial interest cannot take the role of non-accredited partner in a joint sponsorship relationship.

Standard 2: Resolution of Personal Conflicts of Interest

Standard 2.1 The provider must be able to show that everyone who is in a position to control the content of an education activity has disclosed all relevant financial relationships with any commercial interest to the provider. The ACCME defines "'relevant' financial relationships" as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

Standard 2.2 An individual who refuses to disclose relevant financial relationships will be disqualified from being a planning committee member, a teacher, or an author of CME, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CME activity.

Standard 2.3 The provider must have implemented a mechanism to identify and resolve all conflicts of interest prior to the education activity being delivered to learners.

Standard 3: Appropriate Use of Commercial Support

Standard 3.1 The provider must make all decisions regarding the disposition and disbursement of commercial support.

Standard 3.2 A provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.

Standard 3.3 All commercial support associated with a CME activity must be given with the full knowledge and approval of the provider.

Standard 3.4 The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter that includes the provider and its educational partner(s). The agreement must include the provider, even if the support is given directly to the provider's educational partner or a joint sponsor.

Standard 3.5 The written agreement must specify the commercial interest that is the source of commercial support.

Standard 3.6 Both the commercial supporter and the provider must sign the written agreement between the commercial supporter and the provider.

Standard 3.7 The provider must have written policies and procedures governing honoraria and reimbursement of out-of-pocket expenses for planners, teachers and authors.

Standard 3.8 The provider, the joint sponsor, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

Standard 3.9 No other payment shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.

Standard 3.10 If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be

reimbursed and honoraria can be paid for their teacher or author role only.

Standard 3.11 Social events or meals at CME activities cannot compete with or take precedence over the educational events.

Standard 3.12 The provider may not use commercial support to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CME activity. The provider may use commercial support to pay for travel, lodging, honoraria, or personal expenses for bona fide employees and volunteers of the provider, joint sponsor or educational partner.

Standard 3.13 The provider must be able to produce accurate documentation detailing the receipt and expenditure of the commercial support.

Standard 4: Appropriate Management of Associated Commercial Promotion

Standard 4.1 Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CME activities.

Standard 4.2 Product-promotion material or product-specific advertisement of any type is prohibited in or during CME activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided. Live (staffed exhibits, presentations) or enduring (printed or electronic advertisements) promotional activities must be kept separate from CME. For print, advertisements and promotional materials will not be interleaved within the pages of the CME content. Advertisements and promotional materials may face the first or last pages of printed CME content as long as these materials are not related to the CME content they face and are not paid for by the commercial supporters of the CME activity. For computer based, advertisements and promotional materials will not be visible on the screen at the same time as the CME content and not interleaved between computer 'windows' or screens of the CME content. For audio and video recording, advertisements and promotional materials will not be included within the CME. There will be no 'commercial breaks.' For live, face-to-face CME, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CME activity. Providers cannot allow representatives of Commercial Interests to engage in sales or promotional activities while in the space or place of the CME activity.

Standard 4.3 Educational materials that are part of a CME activity, such as slides, abstracts and handouts, cannot contain any advertising, trade name or a product-group message.

Standard 4.4 Print or electronic information distributed about the non-CME elements of a CME activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement.

Standard 4.5 A provider cannot use a commercial interest as the agent providing a CME activity to learners, e.g., distribution of self-study CME activities or arranging for electronic access to CME activities.

Standard 5: Content and Format without Commercial Bias

Standard 5.1 The content or format of a CME activity or its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest.

Standard 5.2 Presentations must give a balanced view of therapeutic options. Use of generic names will contribute to this impartiality. If the CME educational material or content includes trade names, where available trade names from several companies should be used, not just trade names from a single company.

Standard 6: Disclosures Relevant to Potential Commercial Bias

Standard 6.1 An individual must disclose to learners any relevant financial relationship(s), to include the following information: The name of the individual; The name of the commercial interest(s); The nature of the relationship the person has with each commercial interest.

Standard 6.2 For an individual with no relevant financial relationship(s) the learners must be informed that no relevant financial relationship(s) exist.

Standard 6.3 The source of all support from commercial interests must be disclosed to learners. When commercial support is "in-kind" the nature of the support must be disclosed to learners.

Standard 6.4 'Disclosure' must never include the use of a trade name or a product-group message.

Standard 6.5 A provider must disclose the above information to learners prior to the beginning of the educational activity.

Source URL: <http://www.accme.org/requirements/accreditation-requirements-cme-providers/standards-forcommercial-support>