



Joint Providership Checklist

Activity Title: _____

Date: _____ Joint Provider Organization: _____

Documents required with the application before the activity is approved:

- Complete and submit the application* with the following (4 months prior to activity date):
 - Learning Objectives for each lecture (at least 3)
 - Demonstration of gap analysis and needs assessment (within application)
- Detailed agenda and timeframe
- Draft of all marketing piece(s) and/or screenshots (see requirements below)
- Names, CVs, and completed Disclosure Forms* from all planning committee members
- Conflict Resolution forms* (if necessary)
- \$500 Application Fee

Documents required before the activity occurs: (by 3 month prior to activity):

- Signed Joint-Providership agreement*
- Complete the following for each speaker/activity
 - Activity materials (slides, handouts, etc.)
 - Faculty Curriculum Vitae (CV's) for each speaker
 - Disclosure to audience during the activity (slides, handouts)
 - Signed Disclosure Forms* (signed by all presenters, speakers, planners, and content contributors/decision makers)
 - Final copies of promotional materials for review
 - Accreditation Statement
 - Designation statement
 - ADA Statement
 - Intended audience
 - Appropriate Logos
 - Learning Objectives/Purpose (on presentation materials)
 - Sponsorship statement
- Evaluation Form containing questions about commercial bias and presenter disclosures*
- 5-6 Post-test questions

**Refer to LSMS policy handbook for appropriate Statements listed above

Documents required within 2 weeks post activity:

- Photocopy of sign-in sheet, with a typed list if signatures are not legible
- Evaluation forms
- Final Financial Report/Reconciliation (if needed) reporting of expenses and income
- Copy of final activity brochures / promotional materials
- Summary of evaluations and/or testing results
- Remaining fees (\$100/hr, \$25 per certificate, expenses) – will be invoiced

**Documents provided by LSMS ERF*