General Information:
- What date(s) and/or days of the week are you interested in?
- Location?
- In-person, virtual or hybrid?

Budget Development:
Penn CME will create (and manage) a budget with estimated expenses including relevant costs and our fees.
- Will there be any guest speakers?
- How much do you plan to pay for honorarium (guest speakers and/or Penn faculty)
- How much would you like to charge for registration fees?
- Promotion: CME will send up to 10 eblasts to records we have available in our database.
  - There is additional opportunity to purchase regional or national lists from a 3rd party email list service.
  - Hint: I strongly recommend checking with your fellow faculty to post on social media (whoever has a strong social media following!)

Planning Document:
Click this link to create your planning document: **https://upenn.cloud-cme.com/Application**
- Upload a **needs assessment** and (draft) **agenda** to the documents tab.
- You do not need to complete the commercial support tab (send me this information separately).
- If you would like certification for NPs, PAs and/or pharmacists, you will need to include a planner of each respective certification on the planning committee.
  - An advanced practice nurse must also have a role on the agenda (lecture/panel discussion).
- Hint: any faculty added will automatically trigger UPenn Cloud CME to send a disclosure request email. I recommend not adding speakers until you have confirmed they will participate.
- Be sure to save your changes as you navigate each page.
- Please do not click "submit" once the application is complete. Email me to let me know and I will unofficially submit it for review. This allows us to make corrections or updates if necessary.

Financial Disclosures:
Anyone in control of content (planning committee members, faculty, moderators, presenters, and authors) will be required to provide financial disclosure information encompassing the previous two years from completion of the disclosure form.
- **The UPenn CME Office CANNOT review your planning document if any of the planning committee has not completed their disclosures**. Send this link to the planning committee members and ask them to complete their disclosure information: **https://upenn.cloud-cme.com/CME/mytasks.aspx**
- There must be at least one non-conflicted planner on your committee to ensure fair balance and unbiased content.
- As you confirm your faculty, please send the Office of CMIE the names and contact information (email) so financial disclosure instructions can be sent.
- If you have recruited persons who will be authors/creators of content (presentation slides, questions, etc.) but will not be presenting, they must also complete financial disclosure information and be listed as faculty.
- The Office of CMIE will review and mitigate all financial disclosure information and will determine which relationships are relevant to the content being presented for disclosure to the learners.

Educational Grant Support and Exhibits:

- Provide a list of potential supporting companies and include the therapeutic area relevant for the grant request and amount to request.
    - Companies who provide grants will be acknowledged during the activity.
- Additionally, a list of reps/contacts (including emails) of supporting companies should also be provided for Penn CME to request exhibits.
    - Exhibit fees are up to the planning committee, but $2500-$5000 for a one-day exhibit opportunity is within the normal range.