**Joint Providership Letter of Intent**

Preliminary materials must be received 6-12 months prior to the CME activity

**Organization Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Meeting Name:** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Location & Date(s):** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Main Contact Information:**

**Name:**

**Role:**

**Street Address:**

**Phone Number:**

**Email:**

The American Society for Metabolic and Bariatric Surgery’s (ASMBS) Continuing Medical Education

(CME) Joint Providership Program is available on a case-by-case basis. This form MUST be submitted to the ASMBS CME Compliance Manager *prior to the start of any planning of the education activity*. The Pre-Application is mandatory to be in compliance with the Accreditation Council for Continuing Medical Education (ACCME) Accreditation Criteria. In accordance with ACCME regulations, the American Society for Metabolic and Bariatric Surgery must ensure that everyone who is in a position to control the content of the educational activity has disclosed to us all relevant financial relationships with any commercial interest. Therefore, ALL Planning Committee members (those in the position to affect the content of the activity) must complete a Disclosure form prior to the planning of the activity.

To submit disclosure, see our online disclosure form: <https://asmbs.org/financial-relationship-disclosure-form>

**ASMBS Policy on Disclosure**

ASMBS requires all planners, directors, speakers, and staff to comply with the ACCME’s Standards for Integrity and Independence. ASMBS state chapter planners, directors, and speakers’ disclosures are to be collected prior to the start of developing and/or agreeing to participate in an activity. In accordance with the ACCME’s Standards for Integrity and Independence, the ASMBS requires disclosure of all financial relationships and nature of that relationship with ineligible companies, for the **past 24 months.**

**Examples of eligible companies include:**

*Those whose mission and function are: (1) providing clinical services directly to patients; or (2)*

*the education of healthcare professionals; or (3) serving as fiduciary to patients, the public, or*

*population health: and other organizations that are not otherwise ineligible.*

**Examples of such organizations include:**

* Ambulatory procedure centers
* Blood banks
* Diagnostic labs that do not sell proprietary products
* Electronic health records companies
* Government or military agencies
* Group medical practices
* Health law firms
* Health profession membership organizations
* Hospitals or healthcare delivery systems
* Infusion centers
* Insurance or managed care companies
* Nursing homes
* Pharmacies that do not manufacture proprietary compounds
* Publishing or education companies
* Rehabilitation centers
* Schools of medicine or health science universities
* Software or game developers

**Examples of ineligible companies include:**

*Those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.*

Examples of such organizations include:

* Advertising, marketing, or communication firms whose clients are ineligible companies
* Bio-medical startups that have begun a governmental regulatory approval process
* Compounding pharmacies that manufacture proprietary compounds
* Device manufacturers or distributors
* Diagnostic labs that sell proprietary products
* Growers, distributors, manufacturers or sellers of medical foods and dietary supplements
* Manufacturers of health-related wearable products
* Pharmaceutical companies or distributors
* Pharmacy benefit managers
* Reagent manufacturers or seller

**ASMBS Policy on employees and owners of ineligible companies**

Owners and employees of ineligible companies are considered to have unresolvable financial relationships. It is the policy of the ASMBS that these individuals must be excluded from participating as planners or faculty and must not be allowed to influence or control any aspect of the planning, delivery, or evaluation of accredited continuing education except in the limited circumstances.

In accordance with the Standards for Integrity and Independence the ASMBS considers owners and employees as individuals who have a legal duty to act in the company's best interests. Owners are defined as individuals who have an ownership interest in a company, except for stockholders of publicly traded companies, or holders of shares through a pension or mutual fund. Employees are defined as individuals hired to work for another person or business (the employer) for compensation and who are subject to the employer's direction as to the details of how to perform the job.

**Determination of relevant relationships**

Upon receipt of your disclosure information, we will review the disclosure to determine whether your financial relationships are relevant to the education. Please note: the identification of relevant financial relationships does not necessarily mean that you are unable to participate in the planning and implementation of this educational activity. Rather, the accreditation standards require that relevant financial relationships are mitigated before you assume your role in this activity. Financial relationships are relevant and will be subject to mitigation if the following three conditions are met for the prospective person who will control content of the education:

1. A financial relationship, in any amount, exists between the person in control of content and an ineligible company.
2. The financial relationship existed during the past 24 months.
3. The content of the education is related to the products of an ineligible company with whom the person has a financial relationship.

**Mitigation of relevant financial relationships**

Using the lists below, we will identify which mitigation strategy(ies) will be used for all persons with relevant financial relationships (as described in determination of relevant relationships) who control the educational content of the educational activity.

The following are the mitigation steps for planners:

* Divest the financial relationship
* Recusal from controlling aspects of planning and content with which there is a financial relationship
* Peer review of planning decisions by persons without relevant financial relationships

The following are the mitigation steps for faculty and others:

* Divest the financial relationship
* Peer review of content by persons without relevant financial relationships
* Attest that clinical recommendations are evidence-based and

free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines)

The following disclosures **MUST** be received with the submission of this letter of intent by following the below link or as attachments:

**ASMBS State Chapter planners and course directors’ disclosures are to be collected prior to the start of developing and/or agreeing to participate in an activity. List all planners and directors below. This letter of intent will not be approved until all disclosures are received.**

[**https://asmbs.org/financial-relationship-disclosure-form**](https://asmbs.org/financial-relationship-disclosure-form)

**Planner 1 (Name and Email):**

**Planner 2 (Name and Email):**

**Planner 3 (Name and Email):**

**Planner 4 (Name and Email):**

**Planner 5 (Name and Email):**

**Course Director 1 (Name and Email):**

**Course Director 2 (Name and Email):**

**Course Director 3 (Name and Email):**

After submission and approval of the Letter of Intent, the Joint Providership Activity Agreement will be sent with a timeline stating when all the activity materials are due. If the required materials are not received ASMBS holds the right to pull all CME credits from the activity. Below is a brief outline of what will need to be submitted. Please contact the ASMBS CME Compliance Managerif you have any questions.

1. Signed Letter of Intent
2. Signed Joint Providership Activity Agreement
3. Join Providership Full Application which includes the following:
   1. Disclosure information
   2. Commercial Support Information
   3. Education Planning Information
   4. Submission of materials and timeline agreement

By signing this document, the Statement Chapter agrees to submit all the required materials when due for ASMBS, as the ACCME-accredited provider, to provide the appropriate *AMA PRA Category 1 Credit™*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

State Chapter Signature/ Date ASMBS Representative Signature/Date

     

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name Print Name

Best way to contact:  Email:        Phone: