

Dear \_\_\_\_\_;

Thank you for agreeing to be a moderator at the (NAME OF CONFERENCE.) Below please find guidelines that are from the Accreditation Council for Continuing Medical Education and the OU College of Medicine, Office of Continuing Professional Development, the entity providing the *AMA PRA Category 1 Credit™* for this conference.

As an accredited provider, the University of Oklahoma College of Medicine, Office of Continuing Professional Development, requires all moderators to be aware of their roles and responsibilities. Your role is very important to the goal of an unbiased educational activity, and we appreciate your time and attention to our requirements. Please read the following instructions. **You must complete all items in red font.**

**Before the Activity/Conference/Meeting Begins:**

1. Arrive early and check in with the course director for any last minute instructions.
2. Familiarize yourself with the audio/visual aids being used. Check with A/V personnel and see if there are instructions for you or the presenters for use of the equipment.

**At the Beginning of the Activity:**

1. **Introduce yourself to the attendees and give your verbal disclosure.**
2. Cover any housekeeping information, including a reminder to turn off cell phones, restroom locations, break and lunch locations, etc.
3. **Remind participants that in order to receive *AMA PRA Category 1 Credit™*, they must record their attendance and complete the online evaluation. Complete instructions are located in the course syllabus.**

**Before Each Session:**

1. Introduce yourself to the speakers before their presentations and remind them of the following:
  - a. **The speakers must give verbal disclosure when their disclosure slide is on the screen.**
  - b. The amount of time they have to speak and the signals you will use to ensure they stay on time.
  - c. Their presentation must be educational and not promotional.
  - d. Their presentation must not include Protected Health Information (PHI) unless they have authorization, consistent with HIPAA.
2. Introduce the speaker and give a brief bio. Please remember that your time of introduction takes away from the time for the speaker's presentation and for question and answer time.
3. **If the presenter is different from the original speaker (as printed in the program book), please inform the attendees and write down the name of the substitute speaker and what he or she verbally discloses.**
- 4.

**Throughout the Activity and During Each Session:**

1. **As the moderator, one of your responsibilities is to ensure balance and eliminate bias during the session. Attendees who are employed by the pharmaceutical industry should not verbally participate, and they should be wearing a name tag that easily identifies them as pharmaceutical employees.** Here are some examples of situations that may occur during your session and might assist you in diffusing any comments:
  - a. If an employee of the pharmaceutical industry begins to provide information or discussion about their products, the moderator should stop the conversation and announce that within an accredited activity, employees are not to have such discussions and that their roles are observation only.
  - b. If an attendee promotes a product, device, or drug, stop the conversation/discussion and announce that promotion is not allowed within an accredited CME activity.
  - c. If a speaker presents a bias toward any product, device, or drug during his or her presentation, the moderator should try to defuse that bias with other options of products, devices, or drugs.

2. Stay on schedule. If a speaker goes over the allotted time, you may have to skip the 'question and answer' period and move on. If the question and answer period goes over the allotted time, you will have to tell the attendees to see the speaker after the session is over.
3. The session must go through the entire allotted time. If there is time at the end of the last presentation, you can ask if there are any more questions. **If there are not you, as the moderator, must have questions or a case study prepared to engage the speakers and attendees to fulfill the allotted time. If this conference consists of a panel, back-up cases will be provided.**
4. If the session concludes with 10 minutes or more remaining, please inform the course director.

**At the End of the Activity/Conference/Meeting:**

Please give a final reminder that in order to receive *AMA PRA Category 1 Credit™*, attendees must complete the online evaluation.

\*Script for explaining how to receive *AMA PRA Category 1 Credit™*.

"In order for physicians to earn *AMA PRA Category 1 Credit™* and non-physicians to document their participation, participants must record their attendance and complete the online evaluation. You can print your certificate once the evaluation is complete.

If you have any questions, please do not hesitate to contact me.

(ADD YOUR CLOSURE AND SIGNATURE LINE)