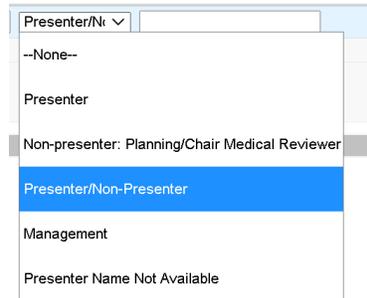


Instructions for Presenter/Non-Presenter Role in the Team and Agenda Manager

Choosing the Presenter/Non-Presenter Role

1. Open the Team and Agenda Manager by clicking on the **Team and Agenda Manager** button.
2. Click on the **Add Team Member** button to add a new line in the Team and Agenda Manager.
3. Fill in the information as usual and choose the **Presenter/Non-Presenter** role in the drop-down menu.



4. Once completed, save the information in Team and Agenda Manager by clicking the **Save** button.
5. **Please Note:** If the team member with the Presenter/Non-Presenter role is **presenting more than one topic**, chose the Presenter/Non-Presenter role **on each** line.

If the individual in the Presenter/Non-Presenter role discloses no financial relationships with ineligible companies (commercial interests), no further review is necessary for the Non-Presenter portion of the role. Content created as a presenter will undergo the normal review process.

Reviewing Process for Presenter/Non-Presenter Role with Financial Relationship(s) with Ineligible Companies (commercial interests)

1. If a Presenter/Non-Presenter discloses a financial relationship, you will receive the usual **COI email** alerting you (see sample below). You will note that the role indicated is Presenter/Non-Presenter.
2. When you view the record in the Team and Agenda Manager, you will see two Medical Reviewer selection menus on the line for the Presenter/Non-Presenter.

Disclosure Status	Medical Reviewer	COI Status	Topic Title	Duration (mins)	Disclosure Status	Medical Reviewer	COI Status	Delete
Negative Disclosure	--None--		.		Negative Disclosure	--None--		X
<input type="checkbox"/> Positive Disclosure	--None--				Positive Disclosure	--None--		X
Negative Disclosure	--None--				Negative Disclosure	--None--		X

3. Before the individual undertakes the **Non-Presenter** role, their disclosed financial relationship(s) must be reviewed to ensure that no area of content that they may plan presents a conflict of interest (COI).
4. Using the **Medical Reviewer** menu **to the left** choose a reviewer. The reviewer will receive the usual **COI alert** email from the system (see below). **Please Note: you must send the reviewer information concerning the areas of content that the Non-Presenter will be planning, to ensure that there are no conflicts of interest.**
5. You will receive an email from the system indicating the reviewer's decision. If the reviewer indicates no conflicts of interest, the process is ended.
6. If the reviewer Indicates that there are conflicts of interests, the conflicts must be mitigated by the **Non-Planner** recusing themselves from planning in areas where the conflict of interest exists. If there are multiple conflicts of interest, the Non-Presenter may need to recuse themselves from planning the activity.
7. When the individual in the Presenter/Non-Presenter roles submits content for presentation choose a reviewer using the second **Medical Reviewer** menu to the right. **Please Note: you must send the reviewer all content that the Presenter has developed, to ensure that there are no conflicts of interest.**
8. You will receive an email from the system indicating the reviewer's decision. If the reviewer indicates no conflicts of interest, the process is ended.
9. If the reviewer Indicates that there are conflicts of interests, the conflicts must be mitigated by the **Planner** editing the content. Should a second review by the reviewer and PeerPoint not resolve the conflict of interest, then the presenter is no longer eligible to present at the activity.

Please see sample emails below.

Sample Email to Project Manager

Memo to: Margaret Brown

From: CME BackOffice

Concerning: Positive Disclosure

We have received a positive disclosure response from Dr. Steven Smith for the Medical Update 2021.

Level of Participation in the Activity: Presenter/Non-Presenter

Sign Date: 5/26/2021

Relationships:

Commercial Interest	Role	What was received?
Commercial Interest 1	Speaking	Honoraria
Commercial Interest 2	Consulting	Consulting Fee

Please note you will be sending the reviewer information concerning the individual who has made a disclosure of financial relationship(s):

1. If the individual is a **Non-Presenter, Planning/Chair Medical Reviewer**, you will be sending the reviewer information about the **areas of content** where the individual will be involved in planning. Please have them review these areas in light of the disclosed financial relationship(s) to ensure that there are no potential Conflicts of Interest (COI).
2. If the individual is a **Presenter**, you will be sending **content that the individual has developed**. Please review these areas in light of the disclosed financial relationship(s) to ensure that there are no potential Conflicts of Interest (COI). **Please note: the reviewer does not need fill in the COI form until they have reviewed all of the content that the presenter has developed, including the abstract.**
3. If the individual is a **Presenter/Non-Presenter**:
 1. a. You will first be sending information about the **areas of content** where the individual will be involved in planning to be reviewed. Please review as in #1 above.
 2. b. Later you will be sending **content** that the individual has developed. Please review as in #2 above.

Please proceed with the following steps in order to resolve the conflict of interest:

1. Login into the CME BackOffice. <https://peerpoint.force.com/>

2. Go to the activity, Medical Update 2021.
3. Go to the Team and Agenda Manager, and locate the record for Dr. Steven Smith.
4. Choose a name from the Medical Reviewer field and click the Save button. This action will send the COI form to the Medical Reviewer.
5. Be sure to use a separate email to send the reviewer a copy of Dr. Steven Smith's abstract or presentation materials and disclosure information.

Thank you.

Sample Email to Reviewer

Memo to: Dr. Mary Baker

From: Margaret Brown

Concerning: Positive Disclosure From Dr. Steven Smith

Medical Update 2021

PeerPoint Demonstration

We have received a positive disclosure response from Dr. Steven Smith for Medical Update 2021, and are requesting that you review materials for this topic, to ensure that there is no bias. Please follow the directions below. You will find all of the information concerning Conflicts of Interest and the ACCME definition of Commercial Interest.

Please note I will be sending you information concerning the individual who has made a disclosure of financial relationship(s):

1. If the individual is a **Non-Presenter, Planning/Chair Medical Reviewer**, I will be sending you information about the **areas of content** where the individual will be involved in planning. Please review these areas in light of the disclosed financial relationship(s) to ensure that there are no potential Conflicts of Interest (COI).
2. If the individual is a **Presenter**, I will be sending you **content that the individual has developed**. Please review these areas in light of the disclosed financial relationship(s) to ensure that there are no potential Conflicts of Interest (COI). **Please note: fill out the COI form only after you have reviewed all content that the presenter has developed, including the abstract.**
3. If the individual is a **Presenter/Non-Presenter**:
 - a. I will first be sending you information about the **areas of content** where the individual will be involved in planning to be reviewed. Please review as in #1 above.

- b. Later I will be sending you **content** that the individual has developed. Please review as in #2 above.

Level of Participation in the Activity: Presenter/Non-Presenter

Sign Date: 5/26/2021

Financial Relationships:

Commercial Interest	Role	What was received?
Commercial Interest 1	Speaking	Honoraria
Commercial Interest 2	Consulting	Consulting Fee

Please proceed with the following steps in order to resolve the conflict of interest:

1. Review the materials to determine if you believe a conflict of interest exists.
2. Click on this link: [Go to COI form.](#)
3. Check the box that corresponds to your determination.
4. If appropriate, enter comments.
5. Check the Electronic Signature box, sign, date and submit the form.

Thank you for your assistance,