Checklist: FEP Organization Process

All communication templates can be found in the FEP Organizer Support Package.

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| Course Name: | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Project Code: | \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ \_\_\_ Course Organizer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Time | Task | done |
| Pre-Planning Approvals  Logistics:  180 Days before- | Application submission with ANA processes |  |
| Confirm all details in Concerto/Agresso/EUCOMED. Ensure project code is on all documents, invoices, contracts, pro-forma henceforth |  |
| Source Hotels\* (3) from each region considered for CEP/FEP; cross check to DPS/compliance guidelines, send to DPS for approval before moving forward with bookings/contracts |  |
| Purchase orders and approvals for contracts, pro forma |  |
| Notify Faculty Development Switzerland of any updates/critical changes |  |
| Event rooms opened by Faculty Development |  |
| Pre-Planning Needs: | Define with Regional CD Education Committee or other responsible board how many FEPs will be run in your region |  |
| Define with CD Education Committee the faculty members (educator/surgeons) for each FEP |  |
| Define date & city in line with budget, practical locations, participant practicality when applicable |  |
| Update Concerto/Agresso with any updates |  |
| Pending  Approvals:  6-9mos in advance- | Submit procurement evaluation form (if applicable) |  |
| Submit hotel requirements to hotel and confirm proforma payments |  |
| Doodle to RETs & Educators with proposed dates (location not relevant) |  |
| Confirm details for CMM in Agresso |  |
| Coordinate the nomination of participants with Education Committee |  |
| Decide on a hotel, sign the contract, add the hotel to the Event Room and pay deposit if necessary (**PO must be signed for amounts over 10K**) |  |
| EACCME Accreditation Application (15weeks prior) |  |
|  | Set up D2L Activities |  |
|  | Send formal invitations to Faculty, Educators |  |
|  | Send formal invitations to Participants, lists from Clinical Divisions, include travel logistics template and program brochure |  |
| Logistics &  Program:  2-4 mos before F2F | Finalize the program in coordination with the RETs, confirm all participant details |  |
| Upload final program to D2L, Event Room and PRINT |  |
| Ensure flights are booked correctly and room requirements delivered |  |
|  | Confirm details of meeting space, accommodation, transfer arrangements, catering, dinner reservations with conference manager |  |
|  | Book an appropriate restaurant for dinner (arrange transport if needed) |  |
|  | Process/confirm any visa requests |  |
|  | Print all material and prepare box to be shipped to hotel |  |

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| Online  Activities:  1-7 weeks  before F2F | Schedule a call with RETs before D2L to facilitate online activites/roles | | |  |
| 7 weeks prior to the event send the participants the "Test Module Email" with the D2L user guide and the online activities overview sheet attached | | |  |
| During the online activities send out the weekly emails and instructions (PDF) | | |  |
|  |  | Week 1 |  |
|  |  | Week 2 |  |
|  |  | Week 3 |  |
|  |  | Week 4 |  |
|  |  | Week 5 |  |
|  | Ensure participants complete the precourse self-assessment | | |  |
| Prepare precourse assessment report to RETs | | |  |
| Send out event details incl. visas, final program and logistics to participants/faculty | | |  |
| Prepare and send as much material as possible to the hotel at least 2 weeks before the event (see separate material checklist) | | |  |
| Prepare the event material you will carry in your suitcase | | |  |
| Print all final material for hotel, travel, contracts, etc. | | |  |
| Set a time, location in hotel for pre-course meeting onsite | | |  |
| After the  Event:  1-3 weeks post | Send Week 6 email and instructions (PDF) | | |  |
| Send evaluation report and completed CTC to the Faculty Development Department | | |  |
| Make sure that all participants complete the post-assessment | | |  |
| Send the AO certificate to participants requiring them and fulfilling the requirements | | |  |
| Send the EACCME certificate/letter to participants when applicable | | |  |
| Finalize/close out all invoices including hotel, travel, dinners | | |  |
| Make sure you receive all reimbursement requests within the current month | | |  |
|  | Collect and count Participant Evaluation forms for EACCME Reporting | | |  |
|  | Thank yous to Faculty/Educators | | |  |