

## Medical Education Event Faculty Checklist and Guidance

### Pre-Program Planning Meeting:

- Confirm title, learning objectives and audience with iRhythm Med Affairs
- Review session format (lecture, panel, workshop, case-based, etc)
- Understand time allocation and Q&A periods

### Contracting Process:

- Provide the following if you don't have a current contract or your entity or address has changed:
  - CV
  - Signed W9 (individual SSN or entity with Tax ID)
  - Does your Legal group need to review the agreement, or can iRhythm Legal team send the agreement directly to you via DocuSign?
  - If you have a requirement for your Legal group to review, provide name and email address and draft of contract will be routed to them first, unless you prefer to present it to the Legal group.

### Payment Set-up Process:

- Provide the following if you want to be set up for ACH (disregard if you want a paper check):
  - Screenshot or scan of a **voided check**
  - OR**
  - Screenshot or scan of the upper portion of your **bank statement** with the following details required only. You may hide or remove all other data to keep confidentiality
    - Bank name
    - Name of Bank account holder
    - Bank Account number
    - Bank Routing Number

\*\*\*Note: **must be in a scanned, pdf, jpg, or png format – cannot be in an editable Word or Excel document**

### Prior to Event:

- Provide the following for program materials:
  - Headshot
  - Short bio for introductions (if you have one)

### Content Creation:

- Include **disclaimer slide** using following statement:

“The opinions expressed within this recording are on behalf of the speaker and do not necessarily represent the views of iRhythm.”
- Include **disclosure slide**

- Prepare a brief introduction and key take-home points
- Include **citations** on data-driven or guideline-based slides
- Avoid including any scientific information for unapproved uses (off-label). For example:
  - Cases including Zio monitors worn with a CIED
  - Pediatric cases
  - Monitors worn outside of 3 – 14 days
- Use approved terminology (e.g. MCT instead of MCOT)
- Submit slides/handouts for legal and regulatory review at least **1 week** prior to event

Payment Process:

- After the event, submit invoice and expense (if applicable) for payment to your iRhythm Medical Affairs contact.