

EVENTS CHECKLIST INSTRUCTIONS



PROCESS STEPS TO PREPARE MEETINGS AND EVENTS

1: Choose the spreadsheet "Type of Meeting" and identify your required meeting/event type and select the meeting/event type by clicking the name.

2: Prepare the meeting/event according to the timelines and the action steps in the checklist and put in a date after finalization of each action. This overview helps you to prepare each single step.

3: For submission of local BI approval please use the Meeting Form complete the details and print this page as a PDF.

4: Submit the PDF for signature by local BI including all relevant attachments required by email to the medical compliance department of local BI and ask for approval by signature (either digital or handwritten).

5: After approval of the event/meeting it is crucial to store the Meeting Form on the BI Angels Sharepoint in the "country specific folder" under "3 Events and Meetings in..." in the event specific folder you have to create.

6: Please make sure that all meeting/event relevant documents are stored in the folder defined above.

DEFINING CRITERIA FOR MEETING TYPE

MEETING TYPE	HOSPITALITY	ACCOMMODATION	TRAVELLING	SPEAKER FEES	ToV (HOSPITALITY)	SPEAKER AGREEMENT	SPONSORSHIP AGREEMENT	HOSPITALITY RANGE	EXAMPLE	BI LOCAL
Hospital Trainings (non-paid speakers possible)					No	No	No	Max refreshments	Simulations, Hospital Workshops	Information required, no approval required
Hospital Trainings (payments)				●	Yes	Yes	No	Max refreshments	Simulations, Hospital Workshops	Approval required
Regional Meetings (no payments)					No	No	No	Applicable	No payments: Regional Simulation Workshops, Emergency Service Workshops	Approval required based on country specifics
Regional Meetings (payments)	●	●	●	●	Yes	Yes	No	Applicable	Regional Simulation Workshops, Emergency Service Workshops	Approval required
National Meetings	●	●	●	●	Yes	Yes	No	Applicable	Stand alone meetings, National Conferences	Approval required
Conferences with booth only (no payment for speaker/attendees, no symposia)					No	No	No	No	Conferences	Information required, no approval required
Conferences without Symposium, but Sponsorship	●	●	●		Yes	No	Yes	Applicable	Conferences	Approval required
Conferences with Symposium	●	●	●	●	Yes	Yes	Yes	Yes	Conferences	Approval required

Speaker framework contract = more than 4x per year

Meeting = Angels Initiated event

Conference = e.g. Society Initiated event