



# **North Carolina Rheumatology Association**

## **2023 Conference Corporate Member Prospectus Prospectus**

**Annual Report  
Contributor Policies  
Agenda  
Corporate Member Opportunities  
Sanctioned Events Application  
W-9**

**2023 Annual Conference  
March 18 & 19  
The Westin  
601 S College St  
Charlotte, NC 28202**

**North Carolina Rheumatology Association**  
341 S. College Rd., Ste 111  
(PMB 2046)  
Wilmington, NC 28403  
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## **NCRA Activities in 2022**

### **Education:**

1. Host the 2022 Annual Conference on March 19 -20, 2022 at the Washington Duke Inn. One hundred and nineteen (119) Physicians and Advanced Practice Providers from NC, VA and TN participated.
2. Support Rheumatology Fellows Programs at Duke Medical School, UNC Chapel Hill Medical School, and Wake Forest Medical School through donations to each school. Support also included free registration to the annual meeting and participation of the fellows in the educational program.
3. Support efforts to obtain guaranteed total funding for fellowship positions at Duke, UNC, and Wake through engagement with interested corporate memberships.
4. Support Rheumatology Research Foundation through donation.
5. Support ongoing research initiatives at UNC-Chapel Hill Pharmacy School and Duke.
6. Endorse the 11<sup>th</sup> Annual Basic and Clinical Immunology for the Busy Clinician CME Symposium and share the information with our members.

### **Advocacy:**

1. Active involvement in issues surrounding rheumatology practice to ensure patient access to care.
2. Advocacy on the state and federal level. Board members participated in advocacy meetings in Raleigh as well as in DC.
3. Board members remain active on ACR committees.
4. Communication with the ACR insurance subcommittee, government affairs committee, Affiliate State Council and CORC regarding advocacy issues.
5. Governing Member of the Alliance for Transparent and Affordable Prescriptions (ATAP).
6. Ongoing advocacy through ACR. State legislative and Capitol Hill visits by several members, including board members.
7. Worked to get SB257 passed in 2021, banning Accumulator Adjustment programs in NC. Stayed involved with SB257 (accumulator adjustment bill).

8. Participation in NC Medical Society initiatives.
9. Support CSRO through membership and attendance of CSRO annual conference and other meetings.
10. One of our board members, Dr. Firas Kassab, is now on the CSRO board.
11. Work with CSRO to protest use of non-clinical surveys (such as SLEDAI) by NC BCBS to justify the use of Benlysta.
12. Attended ACR Hill Day to present NC. Discussed Step Act and Accumulator Co- Pays.
13. NC has a State wide bill for Step Therapy and Accumulator Co-pays which was achieved via coalitions in the state.
14. Encouraging members to support RheumPac in order to maintain high level of treatment for patients w/autoimmune diseases.
15. Signed on to letter to Senator Klobuchar regarding rebate wall issues.
16. Sent letter to Cigna Pharmacy Management regarding offering incentives to patients to switch from Cosentyx to other therapies.
17. Sent letter to BCBSNC regarding biosimilar switching with rituximab.
18. Signed on to letter to BCBS regarding coverage of gout therapies.
19. Signed on to CSRO letter regarding HR3.
20. Sent a letter to BMS in regard to difficulties with Orencia reimbursement.
21. Sign on to letter regarding No Surprise Act.
22. Commented on proposed CMS rules regarding reimbursement for infused biologics at CMS website.
23. Support CSRO advocacy efforts by signing on to their letters.
24. Supporting precision medicine tests coverage at a hearing by Palmetto GBA MoIDX.
25. Speaking virtually representing NCRA at the NC Bioscience Caucus event in Feb 2022.

### **Communication to Members:**

1. Communication to membership through newsletters and blast emails with relevant updates
2. Encourage members to renew or become AMA members so that ACR can retain voting status.
3. Encourage NCRA members to participate in advocacy directly by commenting on proposed rules and providing them with templates to do so.
4. Enhance social media (FB, Twitter, Instagram).

### **Citizenship:**

1. Promoting the mission of NCRA regionally and its importance as a platform for NC rheumatologists to meet, connect, share knowledge and advocate for patients with rheumatic conditions.



## Policies for Contributors

**Purpose:** To establish a consistent policy for all contributors (corporate members, sponsors, exhibitors).  
The policies will be attached to all letters requesting funding for NCRA education sessions.

### General Policies:

1. The NCRA funding levels are described on the attached document.
2. All promised funds must be received one month before the annual meeting. If funds are not received by this date the NCRA cannot guarantee that their corporate name will be included in our written conference materials or that the organization will be allowed to exhibit.
3. All Commercial Agreements must be signed and returned one month before the annual meeting. If the signed Commercial Agreement is not received by this date the NCRA cannot guarantee that their corporate name will be included in our written materials or that the organization will be allowed to exhibit.
4. Contributors must follow instructions to upload documents into the Attendee Hub (mobile app) by due date or NCRA will not guarantee data will be visible to attendees.
5. Contributors **will not** plan any event that conflicts in any way with NCRA sponsored events, NCRA sanctioned events, or NCRA co-sponsored events. Choosing to plan an event that conflicts with an NCRA sponsored, sanctioned, or co-sponsored event will result in the organization not being invited to join us at our next event.

An event is any activity from dinner with one conference attendee to an event to which many attendees are invited.

6. Contributors may not wear their corporate name tags in the meeting space.
7. Contributors may NOT attend the annual board meeting.
8. ***Contributor representatives may attend general sessions if space available. The representatives must sit in back of room and may not engage the speaker or attendees.***
9. ***Contributors are provided a specific number of name badges as described in the attached document. Name badges may not be traded among representatives.***

### **Exhibit Hall Policies**

1. Each contributor will respect the exhibit set-up hours established by NCRA. Exhibit set-up and shipping information will be shared with all contributors by February 15, 2023.
2. The contributor will follow instructions regarding shipping items to the hotel. If instructions are not followed NCRA is not responsible for missing exhibit items.
3. Exhibit space will be provided as indicated in the prospectus.
  - a. Corporate members and sponsors may request a smaller space or to split their space. Request must be received by February 1, 2023.
4. Exhibits must be installed within the parameters of your exhibit space with no components extending beyond. Your installation may not block other exhibitors.
  - a. If your organization will not need the tables provided, your space will be noted on the floor.
  - b. You must notify NCRA that you will not be using your tables no later than March 1, 2023.
5. No banners, signs or other material may be nailed, taped, hung to any hotel property. If a contributor defaces The Westin Hotel, they are responsible for the damage.
6. While the exhibit hall will be monitored during the day and locked after our sessions end, exhibitors and sponsors are encouraged to insure their exhibits, merchandise, and display materials against theft, fire, etc at their own expense. NCRA is not responsible for any damage to or theft of the exhibits.

### **Indemnification**

1. Contributors agree to abide by these terms, and any applicable provisions under NCRA's agreement with the management of The Westin Hotel.
2. Contributors assume full responsibility and liability for any loss, damage or claim arising out of injury or damage to sponsor and exhibitor's displays/materials.
3. Contributors agree to defend, indemnify, and hold harmless The Westin Hotel from and against all claims, actions, causes of actions, or liabilities, including reasonable attorney's fees arising out of or resulting from any act undertaken or committed by Contributor or any contractors hired or engaged by the Contributor in connection with the conference.
4. Contributors also agree to defend, indemnify, and hold harmless The Westin Hotel from any liability resulting from any claim, action or action, which may be asserted by third parties arising out of the performance of the Contributor's obligations pursuant to this agreement, except those which are due to misconduct or negligence of the hotel.

# NCRA 2023 Agenda

Friday, March 17	
5:00pm – 7:00pm	Registration
Saturday, March 18	
6:30am – 7:15am	<b>Breakfast</b>
7:15am – 7:30am	<b>Welcome</b>
7:30am – 8:15am	<b>Vaccines in Rheumatology Practice</b> Jeffrey Curtis, MD
8:15am – 9:00am	<b>Interstitial Lung Disease, an Autoimmune Process?</b> Leonard Lobo, MD
9:00am – 9:45am	<b>Obesity and osteoarthritis-- what is the connection?</b> Sunghye Kim, MMSc
9:45am – 10:15pm	Break
10:15am – 11:00am	<b>Treatment of Spondyloarthritis 2023</b> Joerg Ermann, MD
11:00am – 11:45pm	<b>Therapeutics in Myositis</b> Lisa Christopher-Stine, MD, MPH
11:45am – 12:30pm	<b>Four Corners: Myositis, SLE, Arthritis, Vasculitis</b>
12:30pm -1:30pm	<b>Lunch</b>
1:30pm – 2:15pm	<b>Update on Treatment of ANCA-Associated Vasculitis</b> Peter A. Merkel, MD, MPH
2:15pm – 3:00pm	<b>Non-inflammatory Myositis Mimics</b> Lisa Christopher-Stine, MD, MPH
3:00pm – 3:30pm	<b>Business Meeting</b>
3:30pm – 4:00pm	<b>Break</b>
4:00pm – 5:00pm	<b>Difficult Cases</b> (Curtis, Stine, Jonas, Merkle)
5:15pm – 6:15pm	<b>Reception &amp; Poster Session</b>
Sunday, March 19	
7:00am – 7:45am	<b>Breakfast</b>
7:45am – 8:00am	<b>Welcome</b>
8:00am – 8:15am	<b>Gout as Lodestar: Immune Modulation w biologic treatment and how gout can make us better doctors and people</b> Christopher Parker, DO, FACP, FACR
8:45am – 9:30am	<b>Calcium Pyrophosphate Deposition Disease</b> Ann K. Rosenthal, MD
9:30am – 10:30am	<b>Fellows Presentations</b>
10:30 – 11:00am	<b>Break</b>
11:00am – 11:45am	<b>Remote Patient Monitoring</b> Jeffrey Curtis, MD
11:45 – 12:30am	<b>Update on Evaluation and Management of Large Vessel Vasculitis</b> Peter A. Merkel, MD, MPH

# **NCRA 2023**

## **CORPORATE MEMBERSHIP LEVELS**

### **Corporate Membership Benefits at the Silver level (\$7,500) includes:**

- two (2) tables at our annual meeting
- four (4) attendee name badges
  - opportunity to bring two (2) additional representatives at the reduced rate of \$200/person
  - name badges provide entrance into exhibit hall, and
  - name badges provide entrance into general sessions if space available\*
  - entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - name badges are not transferable between representatives
- four (4) conference notebooks provided at the conference
  - corporate logo in conference notebook on corporate membership page
- four (4) complimentary access codes for the conference mobile app
- corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- podium recognition at conference and annual meeting
- company name on NCRA website with link to your website
  - you provide link you would like NCRA to use

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership at Gold level (\$10,000) includes:**

- two (2) tables at our annual meeting
- six (6) attendees name badges
  - opportunity to bring two (2) additional representatives at the reduced rate of \$200/person
  - name badges provide entrance into exhibit hall, and
  - name badges provide entrance into general sessions if space available\*
  - entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - name badges are not transferable between representatives
- six (6) conference notebooks provided at the conference
  - corporate logo in conference notebook on corporate membership page
- six (6) complimentary access codes for the conference mobile app
- corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- podium recognition at conference and annual meeting
- company name on NCRA website with link to your website
  - you provide link you would like NCRA to use
- fifteen (15) minute private meeting with NCRA executive board on the Friday before the annual meeting

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership at Ruby level (\$15,000) includes:**

- two (2) tables at our annual meeting in a prime location
- seven (7) attendees name badges
  - opportunity to bring two (2) additional representatives at the reduced rate of \$200/person
  - name badges provide entrance into exhibit hall, and
  - name badges provide entrance into general sessions if space available\*
  - entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - name badges are not transferable between representatives
- seven (7) conference notebooks provided at the conference
  - corporate logo in conference notebook on corporate membership page
- seven (7) complimentary access codes for the conference mobile app
- corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- podium recognition at conference and annual meeting and any other event hosted by NCRA during 2023 year,
- company name and logo on NCRA website with link to your website
  - you provide link you would like NCRA to use
- ability to provide one (1) poster that was accepted at 2022 ACR meeting for a \$5,000 fee. Poster would be in the foyer across the lobby from the educational sessions and exhibit hall on Saturday. Saturday reception will be in the lobby near the poster session.
- thirty (30) minute private meeting with NCRA executive board on the Friday before the annual meeting,
- one (1) conversation with NCRA President about issues
- one (1) announcement through NCRA's social media platforms

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership at Platinum level (\$20,000) includes:**

- opportunity to apply for a sanctioned event
- three (3) tables at our annual meeting in a prime location
- eight (8) attendees name badges
  - opportunity to bring two (2) additional representatives at the reduced rate of \$200/person
  - name badges provide entrance into exhibit hall, and
  - name badges provide entrance into general sessions if space available\*
  - entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
    - Sunday lunch is for NCRA physician members only
  - name badges are not transferable between representatives
- eight (8) conference notebooks provided at the conference
  - corporate logo in conference notebook on corporate membership page
- eight (8) complimentary access codes for the conference mobile app
- corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- podium recognition at conference and annual meeting and any other event hosted by NCRA during 2023 year
- company name and logo on NCRA website with link to your website
  - you provide link you would like NCRA to use
- sponsorship of the Saturday reception
- one (1) poster that was accepted at 2022 ACR meeting displayed during the poster session during the Saturday reception. Poster would be in the foyer across the lobby from the educational sessions and exhibit hall on Saturday. You may purchase a 2<sup>nd</sup> poster for \$5000.
- thirty (30) minute private meeting with NCRA executive board on the Friday before the annual meeting
- two (2) conversations with NCRA President about issues
- two (2) announcements through NCRA's social media platforms

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership at Diamond level (\$30,000) includes:**

- opportunity to apply for a sanctioned event
- three (3) tables at our annual meeting in a prime location
- ten (10) attendees name badges
  - opportunity to bring two (2) additional representatives at the reduced rate of \$200/person
  - name badges provide entrance into exhibit hall, and
  - name badges provide entrance into general sessions if space available\*
  - entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
    - Sunday lunch is for NCRA physician members only
  - name badges are not transferable between representatives
- ten (10) conference notebooks provided at the conference
  - corporate logo in conference notebook on corporate membership page
- ten (10) complimentary access codes for the conference mobile app
- corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile. NCRA will provide location in exhibit hall.
- podium recognition at conference and annual meeting and any other event hosted by NCRA during 2023 year,
- company name and logo on NCRA website with link to your website
  - you provide link you would like NCRA to use
- allows NCRA to support Fellows participating in NCRA annual meeting
- sponsorship of the Saturday Lunch with Vendors
- one (1) poster that was accepted at 2022 ACR meeting displayed during the poster session during the Saturday reception. Poster would be in the foyer across the lobby from the educational sessions and exhibit hall on Saturday. You may purchase a 2<sup>nd</sup> poster for \$5000.
- forty-five (45) minute private meeting with NCRA executive board on the Friday before the annual meeting
- four (4) conversations with NCRA President about issues
- three (3) announcements through NCRA's social media platforms

\* priority is given to non-corporate conference attendees for general session seating



## **NCRA 2023 Sanctioned Events Application**

To hold any of the sanctioned events listed below your company must participate at the Diamond (\$30,000) Corporate Membership Level or the Platinum (\$20,000) Corporate Membership Level.

Your application does not guarantee acceptance as all spots will be filled on a first-come first-served for confirmed corporate members. There must be written commitment of corporate membership before your application will be considered.

The decision on who will be allowed to host and which date the sponsor for the event will be made the first week of February 2023. Decisions will be based on date of written confirmation of funding for 2023.

It is the responsibility of the sanctioned event host to find a venue and pay for all costs for the event (ie food, AV, speaker, speaker travel, etc.)

No application will be accepted before January 1, 2022.

We will send due dates for your sanctioned events information. We will do our best to advertise your program, but it is the responsibility of your company representatives to spread the word about your event. We cannot include your event on our conference brochure or other formal written conference advertising. We will share registration list (name, practice, street address) with you in February and then March.

### **Company Name:**

### **Main Contact for the Sanctioned Event**

**Name**

**Email**

**Phone**

### **Sanction Event Opportunities** (Rank from 1-6 with 1 being your first choice)

\_\_\_ Friday Night after registration closes (beginning no earlier than 7pm)

\_\_\_ Friday Night after registration closes (beginning no earlier than 7pm)

\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

Please email this application to: [tab@reubenallen.com](mailto:tab@reubenallen.com)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# Request for Taxpayer Identification Number and Certification

**Give Form to the  
 requester. Do not  
 send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

<b>Print or type.</b>	<b>See Specific Instructions on page 3.</b>	<p><b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  <b>North Carolina Rheumatology Association</b></p> <p><b>2</b> Business name/disregarded entity name, if different from above</p>	
		<p><b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC      <input type="checkbox"/> C Corporation      <input type="checkbox"/> S Corporation      <input type="checkbox"/> Partnership      <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p><b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p><input checked="" type="checkbox"/> Other (see instructions) ▶ <b>501c3</b></p>	<p><b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p style="font-size: small;">(Applies to accounts maintained outside the U.S.)</p>
		<p><b>5</b> Address (number, street, and apt. or suite no.) See instructions.  <b>341 S. College Rd., St 11, PMB 2046</b></p> <p><b>6</b> City, state, and ZIP code  <b>Wilmington, NC 28403</b></p>	<p><b>7</b> List account number(s) here (optional)</p> <p>Requester's name and address (optional)</p>

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>										
<b>or</b>										
<b>Employer identification number</b>										
5	6		-	1	5	6	6	5	3	0

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶ <i>Tammala Bulger</i>	Date ▶ 10/15/2022
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*