SOP

CONFERENCE

INDIAN ASSOCIATION OF CARDIOVASCULAR AND THORACIC SURGEONS

STANDARD OPERATING PROTOCOL

for

IACTS CONFERENCES

Dr Debasis Das

Dr Prasanna Simha

Dr Rashmi P Murthy

TASK FORCE

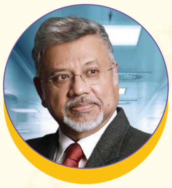
(VERSION 1.1)

EXECUTIVE COMMITTEE

Dr. Devagourou Velayoudam
President

Dr. Bijoy Kutty
Joint Secretary & Treasurer

Dr. Jacob Jamesraj
Secretary



Dr. Satyajit Bose
Senior Vice President

Dr. C.S. Hiremath
Junior Vice President

Dr. Lokeswara Rao Sajja
Senior Past President

Dr. Manoj Durairaj
Junior Past President

Dr. O.P. Yadava
Editor-in-Chief

Dr. Pradeep Narayan
Editor Elect

EXECUTIVE MEMBERS

Dr. Prasanna Simha Mohan Rao

Dr. Debasis Das

Dr. Siva Muthukumar

Dr. Gunturu Varun

Dr. Ramprassath

Dr. Mohammed Idhrees

A standard operating protocol for conduct of our conferences has been a well felt need for some time now. We are thankful to Dr Debasis Das, Dr Prasanna Simha Mohan Rao and Dr Rashmi Prabhata Murthy for their hard work in making this a reality. I also thank every single member of my EC for their inputs. We have vetted this in May 2025 and placed it as a guideline for all organizing secretaries of the IACTS conferences to come and their teams. I would encourage all members to read this and familiarize themselves with protocols. This would be very essential for those who wish to bid for conferences in the future.

Dr Jacob Jamesraj
Secretary, IACTS

TABLE OF CONTENTS

1. Introduction/Purpose

This document provides guidelines and directives for organization of the annual conference of IACTS, usually named as IACTSCONxxxx(year).

The venue city of the conference is decided 2 years in advance by a process of voting.

2. Scope

This SOP outlines the procedures and responsibilities for organising the marque event of IACTS, the annual IACTSCON. It is designed to guide organising committees, central body, volunteers, and stakeholders in ensuring efficient planning, execution, and post-event activities.

The document is a directive and sufficient care has been taken to ensure the autonomy of the local organising committee while maintaining a semblance of uniformity and quality in co-ordination with the central EC of IACTS.

It is imperative that the organising team , mainly the organising secretary has be conversant with IACTS constitution and should ensure that no violations to constitutional provisions take place during the conference. The IACTS constitution is available at the IACTS website: https://www.iacts.org/content/constitution-and-rules

3. Roles and Responsibilities

The three main persons in the local organising committee are:

- Organising Chairperson
- Organising Secretary
- Treasurer

As per the IACTS constitution the incumbent Senior Vice President is the oversight chair for the scientific content of the conference.

The organising secretary of a conference is the chief executive of the organising team with roles including and not limited to the following:

- Raising of finances from the industry
- Finalising the venue
- Ensuring the appointment of an auditor from the first to last financial transaction **:** The auditor should not have any conflicts of interest with the organising team
- Appointment of an event management company
- Senior VP IACTS to Co-ordinate as academic chair with the local organising committee for the scientific content of the Annual conference
- Selection of national and international faculty: Academic chair Senior VP to lead
- Communication and promotion of the conference
- Smooth conduct of the conference
- Closing the loop with post conference compliances
- Licensed Tally software will be provided by the HO and Organising Secretary is responsible to maintain accounts in the same . This Tally accounting software is on the cloud platform, so the central auditors will have access to real time financial data.
- Every financial transaction has to be duly supported by receipts along with necessary vouchers / supporting any agreement executed with respect to third-party sharing of fees, if any, needs to be maintained.
- **The secretary will follow the guidelines mentioned in the MOU with IACTS in letter and spiritand indemnify IACTS from all consequences and litigations arising out of the conduct of the conference**.

The Organising Chairperson remains the main guiding person to the organising secretary with overlapping roles in all of the above.

The Treasurer is the chief financial executive of the conference. He/ She along with the organising secretary ensures the financial compliances and timelines and signatories to the payments.

IACTS Central office roles

- ***Senior Vice President (IACTS):***Co-ordinates as academic chair with the local organising committee for the scientific content of the Annual conference
- ***Secretary IACTS:*** Main guide to ensure quality and compliances
- ***IACTS Treasurer:*** Ensures statutory / regulatory compliances (Organizing team reports to IACTS treasurer for all financial compliances), ensures co-ordination with local teams auditor and IACTS auditor
- ***IACTS EC including JVP/ Other EC members:*** Serves as the guiding body and the organising teams updates the progress of the conference preparation to EC time to time. Few sub- committees may be formed on President and Secretary's advice for steering the conference planning.

4. Pre-Conference Planning (venue selection, speaker invitations, registration):

- Conference bidding process is invited by the Secretary in December.
- The bidding team should clarify the following points in the bid:

  -Estimated delegate numbers

  -Budget estimate (Tentative Income vs Expense)

  -Conference venue(Give 2 options)

  -Facilities, hotels, transport links

  -Declare the names of proposed Organising Secretary, Organising Chairperson and Treasurer for the conference

-It was decided that during the bid, organising secretary will announce the auditor details as well.

- After winning the bid the organising team should finalise venue and accommodation rates well in advance
- Develop a detailed budget and financial plan
- Appoint an auditor/ auditing firm. This should be a firm/ CA recognised by the Institute of Chartered Accountants of India (ICAI)
- Prepare a detailed timeline and work schedule.
- Appoint a event management company (choose in a transparent manner with documentation): This should be an open bid and one nominated member of EC should be a part of the decision making team.
- Identify and invite keynote speakers, invited faculty, panelists, and moderators.
- Obtain necessary permissions and approvals(For foreign faculty)
- Develop a sponsorship and funding strategyand present the same to the EC
- Plan marketing, promotions, and registration process.
- Get website ready and registrations open by the previous conference
- Plan evening events/ spouse activities / local sightseeing opportunities (in a manner that scientific program doesn't get diluted)
- Organise live streaming of the event/ Special registration rates for virtual attendance
- Complimentary Accommodation and Complimentary registration is the prerogative of the organising committee depending on the financial situation
- Invited foreign faculty are typically given complimentaryaccommodation and registration . Travel arrangements are on request by foreign faculty.
- Lifetime achievement awardees are extended complimentary travel, accommodation and registration.
- Traditionally the current executive committee members are given Complimentary Accommodation and Complimentary registration .
- Free registration may be provided to faculty depending on the financial situation. National faculty may pay for their own accommodation, please send the details in advance with clarity on this issue as per your budget and preference.
- The fee structure for postgraduates, delegates, non-members, and industry should be reasonable.
- Online registration should also be available.

- All vendor selections should go through aopen and transparent biddingprocess.
- The organising committee and the executive committee will jointly analyse the financial status and approve proposed complimentary perks to delegates.
- The release of the advance refundable fund from IACTS will be in aliquots subject to achieving key milestones in the planning of the conference by the organising committee.
- ***Prepare an excel sheet of things to do and be executed marking them as Red (Urgent) yellow(important) and green (executed)***

Important Do's and Don'ts:

- Once the conference is being planned as per requirement an independent auditor is required whose name is as specified in the bid.
- Most important thing is to have a bank account opened with liaison with the main IACTS office
- Application of local GST is to be done on a priority basis as it takes time
- Prepare list of vendors It is advisable to talk to both distributors and companies. Note that company money is usually given after the conference and takes some months, and they have to go through their accounting practices
- Distributors are the persons whom you need to contact to get money early
- Registrations will have to be started early (early bird) and subsequent repeated reminders
- When hiring an event manager take quotes and line by line itemized bills and ask them for all things required. They will charge additional costs for every additional item which can make budget overshoot.
- Remember that you need to deduct TDS for every payment and every receivable will have to get TDS done so TIN number is vital. TDS has to be done by the 6th of the coming month and the receipt has to be furnished to the central office.
- Letter of intents will help budgeting
- Please note that foreign payments for airfare etc are expensive and due to regulation,it's better to coordinate with both CA and banks
- Many companies will ask you to do the booking to avoid honorariums by the companies asking you to invite them
- Conference Visas are difficult process so either process well in advance
- For foreign faculty to participate in an Indian conference, they typically need a Conference visa. This visa is granted for the sole purpose of attending the conference, seminar, or workshop in India. The Ministry of Home Affairs (MHA) provides detailed guidelines and procedures for obtaining this visa
- Following is the link to MHA document of conference visa: https://www.mha.gov.in/sites/default/files/ForeigD-FAQs-on-ConferenceVisa-Updated_04052017.pdf
- Closure of accounts has to be made as per IACTS treasurer offices norms and MOU must clearly reflect that and local auditor is legally liable for noncompliance
- The organizing chairman and secretary must devolve various responsibilities to various members and a fundamental mistake is to keep all work localized to the secretary/chairman and not devolving responsibilities early enough and monitoring the same
- Prudence to be applied when booking rooms. If companies are asking for rooms their commitments must be taken clearly. Make the distributors responsible for room booking and allotment. Preferably avoid command check the previous years rated to prevent over invoicing. Its preferable that the event manager does not do the room booking and make it part of the package when taking the conference venue.

- Room release is also to be negotiated and please release rooms before time so that punitive charges are not implemented by the hotel.
- Periodic updates to the EC through short progress reports to improve transparency and institutional memory.

5. On-site Operations (registration, logistics, A/V setup)

- Registration should be online through website well in advance
- Venue should be the same as proposed in the bid (one of the two declared options)
- If for unforeseen reason, venue needs to be changed, the organising secretary has to inform the President and Secretary who then seek approval from the EC.
- If the changed venue is agreed upon, a small walkthrough visit by the President and Secretary is a must before final approval.
- The IACTS logo should be prominently displayed on the website, print materials, and audio-visual screen.
- Hall distribution is as discussed in the Scientific session of this SOP.
- IACTS GBM to have a fixed timing
- GBM on Day 2 (typicallyFriday)at around 4pm- 6 pm– should be mentioned in the program
- No competing sessions during the GBM or plenary sessions
- IACTS Presidential oration, Life time achievement award, All orations must be conducted at a time when there is no parallel session.
- President and secretary are typically the chairpersons of these events mentioned above.
- Trainee/Student Award paper sessions and Trainee/Student Quiz and other student related programs and competitions should be given prime position and in plenary session**(especially award paper session)**
- Signages should be in place for all halls.
- Event should be live streamed : Whether to charge a registration for virtual attendance is the prerogative of the local organising team.

6. Scientific Program Management (abstract review, session scheduling)

The main scientific content consists of :

Pre conference day (Thursday) : Either workshops or a post graduate course

Conference Days: Friday/ Saturday/ Sunday(till lunch)

The conference day contents include:

- Invited Lectures
- Named Orations
- Panel discussions/ Debates/ Video sessions/ Live in box sessions
- “Free” papers : Selected papers from the abstracts for oralpresentation
- Award paper sessions (separate detailed SOP at page 9)
- E posters

Usually there are designated Plenary sessions and then parallel sessions in Halls which are:

- Adult cardiac surgery(Main Hall)
- Adult cardiac surgery(Additional Hall for subspeciality tracks: MICS/ Aortic/ Heart failure/ Transplant)
- Congenital cardiac surgery
- Thoracic and Vascular surgery
- Physician assistant/ Nursing Track

The scientific program should be made well in advance led by Senior Vice Presidentalong with local organising committee.

Sufficient autonomy will be given to the organising secretary in draft of the scientific program to keep room for various compulsions of finances/ industry etc.

The draft program should be ready by 30th November the previous year and the scientific program finalised by 31st December of the previous year.

All faculty (national and international) should receive communication through a single coordinated channel, preferably from the Sr VP or Org Secretary, to avoid duplication or confusion.

Sharing of the draft program with industry partners helps early mobilisation of funds.

- Abstracts and award papers announcement 6 month before, last date 3 month before, announce results one month before
- Award papers to be judged by an award committee who are selected beforehand
- All parts of the country are represented in faculty selection as it is our national conference

IACTSCON Award Paper Section – Standard Operating Procedure (SOP)

A. PRE-AWARD SESSION PROCEDURE

1. **Eligibility and Submission**
    - The presenting author must be an IACTS member and ≤40 years of age on the day of presentation.
    - The submitted manuscript must be an original work, not presented or published previously.
    - Full paper in IMRaD format should be submitted via *editorialmanager.com/IJTC* under "Original Article" marked "For Award Paper Session," and also emailed to the Organising Committee.
2. **Manuscript Type**
    - Eligible: Analytical studies (RCTs, propensity-matched, prospective or retrospective observational studies).
    - Ineligible: Case reports, narrative reviews, images. Case series may be considered if of significant size and follow-up duration.
3. **Manuscript Review & Selection**
    - Abstracts will be used for initial selection. They should be sent to the secretary, organizing committee in proper IMRaD format.
    - Abstracts must mention that they wish to be considered for the award paper. These Abstract should be sent to the Editor- in-chief(EIC) of the IJTC immediately after closure of submission.
    - The EIC will identify 6-8 potential abstracts and inform the organizing committee. Rest of the abstracts can be reconsidered for oral or poster presentation by the organizing committee.
    - Selected candidates must submit full manuscripts at least **4 weeks** prior to the conference on the editorial manager of the IJTC.
    - An anonymized version should be circulated to the judges **at least 1 week prior** to the award session.
4. **Panel Composition**
    - Judges should include **3 experts**, ideally IJTC editorial board members (EIC, Associate Editors, Section Editors), barring conflicts of interest.
    - EIC shall appoint both the abstract selection and final judging panels.

B. DURING THE CONFERENCE – AWARD SESSION FORMAT

1. **Number of Papers**
   - Typically, 4- 6 presentations, with 2 waitlisted. (Total Time 60-90 minutes)
   - The award session should be scheduled at prime time in the plenary session.
2. **Presentation Protocol**
   - **Duration**: 8 min presentation + 5 min Q&A (timed) = 13 min per paper.
   - **Anonymity**: Slides must contain only the presenting author's name; institutional or co-author names are strictly prohibited.
   - **Dress Code**: Formal attire is mandatory.
3. **Evaluation Process**
   - Each judge SHALL score independently using the following rubric:
     - Study design: 30 pts
     - Originality: 20 pts
     - Statistical rigour & sample size: 20 pts
     - Literature context: 10 pts
     - Indian clinical relevance: 10 pts
     - Presentation quality: 10 pts
   - Each presenter will be ranked by each judge; the total of ranks determines the winner (lowesttotal of ranks, not marks, wins).
   - Ties shall be resolved by the panel, casting vote of EIC, if still unresolved.

C. POST-SESSION OUTCOMES & PUBLICATION

1. **Award Declaration**
   - The EIC shall announce the winner in consultation with judges either immediately or at the session where other awards and honours are bestowed. It should be in the session itself and not later.
2. **Prize**
   - Certificate + Rs 1.5 lakh sponsorship to attend an international academic conference (Prize money to given by IACTS central body)
   - The grant will be disbursed only upon submission and verification of all required documents, including proof of registration, acceptance, and travel details.
   - The Secretary of IACTS, in consultation with the Executive Committee (EC), will oversee the approval and release of funds to ensure transparency and appropriate utilization.
   - Extension allowed for one year if travel is delayed, upon approval by EC.
3. **Publication**
   - The award-winning paper must be published in the IJTC with a footnote stating: *"Award-winning paper – IACTSCON [Year]"*
   - IJTC reserves first right of publication. Rejection frees the authors to submit elsewhere.

D. Additional Notes

- Judges can disqualify any presentation that violates anonymity rules.

7. Financial Management

Raising the finances for the meeting is the predominant responsibility of the local organising committee. Any challenges in the process should be discussed with the Secretary IACTS/ EC for help.

Current NMC guidelines for conferences should be adhered to in financial matters strictly.

Please refer to :https://www.nmc.org.in/about-nmc/cme-programmes/guidelines-for-cme-scheme/

Raising finances and meeting the budgetary requirement for the annual conference is increasingly getting difficult.

The finance raising initiatives should start well in advance just after the previous conference is over.

The organising secretary can seek help from the previous organising secretary to get the list of company names and their contribution the previous year.

- A local auditor has to be appointed from the beginning from the first financial transaction.
- The auditor has to be an independent auditor who has no financial interests /conflicts of interest with the organizing committee. The auditor and the bidders must give a statement for the same to the IACTS EC,registered with ICAI as mentioned supra.
- The local auditor has to co-ordinate with the central IACTS auditor seamlessly throughout.

Mobilisation of Funds: Some pointers

- Ask your local tender/procurement office of all the hospitals to prepare a list of items used by the respective units and how much has been utilized with cost to tap the potential industry partners.
- Also do not forget drug companies etc. These are useful in negotiations with companies who will try to offer lesser amounts.
- Remember that smaller companies offering smaller amounts can add up significantly for e.g. they can be offered banners/ standees etc at their cost.
- Market the areas as per platinum diamond gold silver etc. and charge accordingly as needed for your budget +30% overhead due to unexpected expenses.
- Preferably try to get distributors to commit to do things directly like local transport etc as this will reduce costs considerably and avoids double taxation of both GST/TDS for money paid and money spent thereafter
- Avoid dinners etc. faraway - they are a logistic nightmare
- Please keep early food for those who do not drink and would like to go back quickly
- Alcohol is coming under severe inspection by IT so be prudent
- Consider boxed lunches and luncheon sessions sponsored by various companies to reduce costs. They will be able to market their product and you get funding
- Expense tracking is vital so involve your CA and have a local auditor and secretary to maintain bills and enter them in excel or Tally so that real time check by auditor and central auditor is possible
- Keep list of timelines for payments TDS etc. every month as per IACTS MOU
- ***The organizing secretary has to return theRefundable advance amountof 50 lakh from IACTS within 1 month of the conference preferably.***

The IACTS compliance guidelines and the expected timelines are mentioned in detail in the next section on Compliances.

8. Compliance Guidelines

A. Timelines for National Conferences

Please find below the timelines for the upcoming national conferences:

Compliance Category	Timelines (On or Before)	Point of Coordination	Point of ultimate reporting
Opening of Bank account	30th September of the previous year	Head Office	IACTS Secretary & Treasurer
GST Registration	30th September of the previous year	Head Office & Local Auditor/ CA	Principal Auditors office& Treasurer IACTS
Budget For the Event	30th June of the previous year	IACTS Secretary & Treasurer	Principal Auditors office& Treasurer IACTS
Documentation for Sponsor Appeals, Vendor RFP, Purchase Order/Quotations	31st August of the previous year	Head Office	IACTS Secretary & Treasurer
Appointing a Local CA for GST Registration & Allied Matters	30th June of the previous year	IACTS Secretary & Treasurer	Principal Auditors office
Payment Processing, Statutory Compliance & Account Maintenance	7th November of the previous year onwards (Monthly reporting)	Local CA & Head Office	Principal Auditors office
Preparation of the Financial statements for review	30th April of the conference year (post conference)	Local CA & Head Office	IACTS Secretary & Treasurer
Transferring of Funds from Conference account to Central Account	30th April of the conference year (post conference)	Local CA & Head Office	IACTS Secretary & Treasurer
Completion of Audit of event account	31st May of the conference year (post conference)	Local CA & Head Office	Principal Auditors office
Report from Conference Team before EC	31st May of the conference year (post conference)	IACTS Secretary & Treasurer	EC members

B. Financial Guidelines in the MoU

The financial guidelines outlined in the Memorandum of Understanding (MoU) are as follows:

1.a Financial guidelines proposed were as follows

Sl. No.	Details of Activities	Conductedin Month	IACTS Support (Refundable Advances) Maximum
1	Annual Conference	February	50,00,000

1.b Authorized Signatories for IACTS Events

a. Organising Secretary of the event
b. Organising Treasurer of the event
c. IACTS Treasurer (ex-officio).
Any two signatories will operate the account jointly.

1.b (a) Bank Account for events.

For IACTSCON Bank account must be opened with ICICI BANK in the city/
district where the conference is to be organised. **Opening the Bank account is the responsibility of the organizing secretary in consultation with the Bank Manager. Necessary documents will be provided by the IACTS Secretary and the Treasurer from the Central O ffice.**

For 'CMEs' there are existing earmark Bank accounts with ICICI Bank Mumbai in the name of the 'CMEs'. The names of the Organizing secretary and Treasurer would be added to these accounts for seamless operation for the event concerned duly conferred by the IACTS Treasurer after procuring the necessary KYC and allied documents from the event organizers/authorised signatories.

1.c Guidelines for Sponsorships

All the events should make appeal and consequently issue receipt for sponsorship and not for the stall concerned. In case of Sponsorships receipts, TDS to be deducted @10% or 2% (U/s. 194J or 194C) of the Income Tax act in force. If the Organizing Secretary is collecting Education Grant / Donation for any workshops, in that case, said receipts to be routed through the Central Accounts in order to get 80G benefits to the Donor.

For Stall Space, receipts can be issued under heads other than 'Rent"– it will be treated as business activities and accordingly we need to collect and pay GST 18 % on said amount.

1.d Kindly refer the below Annexure 1 for TDS applicability.

In all cases, TDS deducted needs to be deposited into government treasury on or before 5th of the next month in which TDS deducted. In case of default, penalty will be levied @ 18% pa and Rs. 250 per day of default. KYC document of all the vendors should be taken before hand at the time of onboarding/awarding the contract to the vendor concerned. Document such as Purchase Order, proforma invoice, engagement letter should be part of the basic documentation of every vendor PAN else TDS rate will be 20 % of the amount to be paid.

1.e TDS of IT quarterly returns need to be filed on or before the due dates as per the following table and communicated to the central office with a copy to the main auditor with supporting evidence such as filing receipt, challan etc.

Quarter	Periodicity	Due Dates
Q1	April to June	July 31
Q2	July to September	October 31
Q3	October to December	January 31
Q4	January to March	April 30

1.f GST MATTERS:

1. Although GST returns are being filed for every month by 20th of Next month at the central office, necessary data should be collated by the event organiser/delegated staff and the same should be sent to the central office forbeing incorporated.
2. It should be noted by the concerned organiser and/or the appointed accountant for the event that all receipts in the form of sponsor ships from corporate donors should follow the RCM Mechanism for GST. In other words the sponsored alonewould bear the obligation for discharging the GST liability and not pass it on to IACTS through the amount sponsored. No part of the sponsored amount shouldcontain an element of GST.
3. All vendors rendering services to IACTS who are registered under GST shouldquote IACTS GST number on the invoices raised by the IACTS.
4. All sponsorship invoice made by IACTS on the sponsors should contain the note in bold letters that **"sponsorship services are falling under RCM list under the prevailing GST laws, hence GST on sponsorship has to be discharged by the recipient of the service"**

1.g Accounting:

Organising Secretary is responsible to maintain accounts in Tally accounting software.

Licensed Tally software will be provided by the HO and Organising Secretary is responsible to maintain accounts in the same . This Tally accounting software is on the cloud platform, so the central auditors will have access to real time financial data.

Everyfinancial transaction has to be duly supported by receipts along with necessary vouchers / supporting; any agreement executed with respect to third-party sharing of fees, if any, needs to be maintained. All expenses incurred by the organizing committee shall be duly authorized. Impress advances should be settled promptly. A full account of the event containing receipts and payments, an Income and Expenditure Account and a Balance Sheet should be prepared and forwarded for audit withintwo weeks from the end of the event or such further time as may be allowed by the Secretaryand the treasurer on sufficient cause shown on email.

For expediting this, the Organizing Secretary has to identify and engage a Chartered Accountant Firm (CA Firm) that will carry out all the accounting & compliance activities. The said CA Firm shall report to and coordinate with the Central Auditing Firm for periodical compliances (for GST & TDS), accounting updates and allied matters. The CA Firm thus engaged should be unrelated and independent of any member of the organizing committee.

Tally updating in cloud should enable both local and central auditor have access to financial data in real time seamlessly.

1.h Auditing:

Upon receiving the draft financial statements from the CA Firm referred to in the foregoing paragraph, the Statutory Audit needs to be conducted with respect to Event Accounts. Draft financials should reach Treasurer's Office within 1 month of completing the event or such further time as may be allowed by the Secretary and the Treasurer on sufficient cause shown on email or appropriate channel of communication.

The audit would be conducted by the Central Audit Firm to whom the aforementioned CA Firm shall abide by all requirements for the overall purpose of achieving the objective of StatutoryCompliances,Accuracy and Completeness of Accounting records, `Truth and fairness of the financials vis-à-vis the conduct of the event. The audit report should be affixed with UDIN as recommended by the Institute of Chartered Accountants of India. Any matter that highlights irregularities as regards the event, or the transactions relatedthereto should be brought to the attention of the Secretary/Treasurer.

The Organizing Secretary along with the CA Firm shall be responsible for any lags in completing the accounts, missing due dates for compliances and failure to provide information/documents to the Central Auditor. Scheduling the Central Audit visit and ensuring the timely completion shall be the ultimate responsibility of the Organising Committee.
All costs of conducting the Audit by the Central Audit team shall be borne by the Organising Committee.

1.i Organising Secretary must submit his/her reports to Executive Committee (in additionto Audited Receipts & Payments accounts and Auditor's Report) in the format given by Executive Committee.

1.j Closure of Bank Accounts:
Organising Secretary must close the event accounts immediately once Audited Receipts and Payment accounts are signed by the Auditor and any balance in the accounts, mustbe transfer to IACTS accounts at Mumbai.

1.k The following actions may be considered in cases where the organiser is unable to comply with or inadvertently defaults on the above guidelines.

1.k (a). Any negligence / non-compliance with respect to any of the clauses in the MOU or inrelation to Direct as well as Indirect taxes, Organising Secretary will be responsible inhis / her personal capacity.

1.k (b). Any loss which may occur to the Association shall be indemnified by the concerned Organising Secretary in his / her personal capacity in favour of IACTS

1.k (c). Organising Chairman, Secretary, and Treasurer will not be eligible to contest for any IACTS posts like President, Secretary, Treasurer or Executive members.

1.k (d). Organising Chairman, Secretary, and Treasurer will not be considered for organising any IACTS Events like Annual Conference & CMEs in future.

1.k (e). Organising Chairman, Secretary, and Treasurer will not be considered to chair any Session in the IACTS Events.

1.k (f). Organising Chairman, Secretary, and Treasurer will not be considered to deliver any prestigious oration related to IACTS

2. Annexure 1

Debit Head

SL. No.	Debit Heads	TDS Rate	Section	Remarks
1.	Venue	10 %	194I	If amount is > Rs. 1,80,000
2.	Event Management	10%	194J	If amount is > Rs. 30,000
3.	Travelling Reimbursement	NIL	NA	Supporting required
4.	Hardware Purchases	NIL	NA	Supporting required
5.	Mementos	NIL	NA	Supporting required
6.	Catering Charges	2%	194C	If amount is > Rs. 30,000
7.	Printing & Stationery	NIL	NA	Supporting required
8.	Professional Fees	10%	194J	If amount is > Rs. 30,000
9.	Lodging Expenses	NIL	NA	Supporting required
10.	Conference Kit	2 %	194C	If amount is > Rs. 30,000
11.	Decoration	2 %	194C	If amount is > Rs. 30,000

3. New Internal Audit Checklist

The Internal Audit team has also provided a pre and post checklist to ensure compliance and accuracy in our processes.**(Appendix 1)**

9. Marketing and Promotion

- Promotion of the conference well in advance leads to better participation.
- IACTS central body also plays a part in promoting the conference through the empanelled digital marketing players.
- First announcements/ Key speakers profile etc to be circulated in e mails/ Whats app groups to generate interest.
- Event management company engaged by the organising team also plays a key role in promotion of the conference guided by the local organising team.

10. Post-Conference Activities (data analysis, attendee feedback)

- Circulate an online feedback form
- Analyse attendance of sessions
- Use data analytics to gain insights and share with the IACTS EC so that the next organising team gets help
- Hold a team meeting (Organising Committee) to discuss successes and challenges and to note down minutes of such meeting.
- Organising Committee Chairman/ Secretary to review the overall event management process and recommend suggestions to EC.

11. Post conference Audit and presentation

- Submission of abstracts of oral presentation to IJTC within 4 weeks of conference for publication in the correct IMRaD format.
- Review all expenses and income related to the conference.
- Finalize Cash Flow Statement for the Event (actual cash/bank inflow and outflow)
- Prepare a financial report for EC Members confirming event profit or loss and reasons for loss, if any
- Prepare budget vs actual for income and expenses and provide to EC for their review; Variance Analysis to be included
- Whether signed Event Audit Report has been received within 30 days of the closure of the Event

The organizing secretary presents the audited financial report in the next conference.

12. Appendix 1: Pre and Post Conference Checklist

Pre-Conference Checklist			
Actionables for IACTS Team	**Remarks by IACTS**	**Complied (yes/ no)**	**Concerned SPOC**
1. Planning and Organization			
Has an approach note for the proposed conference been shared with the EC for approval? i.e. financial viability of the event, reasons for choosing the specific city/town etc			
Has budget been prepared citing fund contribution from IACTS and other incomes and expenses, break even number of participants required to make this a viable venture for IACTS? If prepared, has it been approved by EC?			
Have venues been evaluated and has a comparative sheet (venue, location, cost etc) presented by Organising committee to EC for their approval?			
Is Contract signed with Venue/Hotel? Is such contract presented to EC for approval? Does Legal team of IACTS vet such contract before it is signed?			
Have timelines been drawn i.e. fixing the venue, budget approval, creation of organising committee, date of proposed conference etc.? And is a regular tracker maintained to check if timelines are being met or not?			

2. Team Coordination			
Have roles and responsibilities been explained and distributed to various officials of the Organising Team along with appointing the Org Committee Chairperson?			
Are the Org Committee meetings recorded (if on VC) and are minutes of meeting prepared and circulated for actionables tracking?			
Is the progress made by the Org Committee informed to EC members or any SPOC at the IACTS central office?			
3. Registration and Attendees			
Is a website created for the Conference through which the registrations are taken? Alternatively what is the registration process.			
Is separate bank account created for the purposes of this Conference?			
Who are the signatories to this bank account? And is prior permission taken from EC?			
Is auto confirmation email sent to participants once they are registered?			
Is auto reminder sent to proposed participants so that they register before the deadline?			
Is there a helpline in case particiapants face any technical difficulties or wish to file any grievance?			
Is there a mechanism to monitor whether break even participants have registered and their demographics?			
4. Agenda and Speakers			
Has the topics and the speakers list been finalised by Org Committee and have invite letters been sent out to selected speakers?			
Are any MOU’s been signed with the speakers especially where payments to speakers is involved? Does it have a para to confirm what costs are to be reimbursed by IACTS and likewise what costs are to be solely borne by speaker?			
In case IACTS has to arrange speaker travel, are tickets/ hotel booked in advance?			
Are speaker PPT’s/ materials taken in advance prior to conference date?			
5. Marketing and Promotion			
Has a social media / PR agency been hired for the marketing and promotion of the Conference? Is cost approved by EC?			

Have vendors been finalised for printing promotional material? i.e. brochures, banners, ID Cards, conference study material etc? Is the vendor approved by EC?			
6. Logistics and Operations			
Is an event management agency onboarded? If yes, provide cost comparative statement used during evaluation stage.			
Is Agreement duly signed with Event Management Agency?			
Are volunteer roles distributed within Organising Committee for Food, Speakers Coordination, AV/Tech in conference hall?			
7. Risk Management			
Is Insurance policy taken for the upcoming Conference?			
Are all licenses taken for the Conference? Viz. Liquor License, Music License etc			
Confirm if all licenses as provided by Hotel's checklist are taken by IACTS team			
8. Stakeholder Engagement			
Confirm if list of sponsors is finalised and Letter of Intent is presented to EC for their confirmation.			
Are Agreements entered with Sponsors?			
Is the sponsorship amount received from Sponsors prior to commencement of Conference or as per milestones mentioned in Agreement?			
Are feedback forms distributed in hard copy or through link?			

Post-Conference Checklist			
Actionables for IACTS Team	**Remarks by IACTS**	**Complied (yes/ no)**	**Concerned SPOC**
1. Feedback and Evaluation			
Are post-conference surveys distributed to attendees and speakers?			
Does Org Committee analyze feedback to assess conference success and areas for improvement?			
Does Org Committee / EC compile a report summarizing key findings, insights and learnings from the Conference?			
2. Financial Reconciliation			
Confirm if Event Auditor has been appointed			
Review all expenses and income related to the conference.			
Finalize Cash Flow Statement for the Event (actual cash/ bank inflow and outflow)			
Prepare a financial report for EC Members confirming event profit or loss and reasons for loss, if any			
Prepare budget vs actual for income and expenses and provide to EC for their review; Variance Analysis to be included			
Whether signed Event Audit Report has been received within 30 days of the closure of the Event			
3. Documentation and Record Keeping			
Confirm who is the custodian for the Event/Conference bills, receipts, invoices, vouchers etc and maintain in a file for verification at all times			
Confirm whether Event Audit Report is received.			
Confirm who shall collect and archive conference materials (presentations, handouts).			
Maintain a list of attendees and contacts for follow-ups.			
4. Follow-Up Communications			
Confirm if thank-you notes to speakers, sponsors, and attendees have been sent out by IACTS			
Whether recorded sessions or highlights with attendees have been shared			
Whether IACTS has a plan to engage with attendees on social media to maintain relationships for upcoming conferences			

5. Post-Event Debrief			
Hold a team meeting (Organising Committee) to discuss successes and challenges and to note down minutes of such meeting.			
Organising Committee Chairman to review the overall event management process and recommend suggestions to EC.			
Identify actionable improvements for future conferences.			

Appendix 2

IACTS CMEs:CT CME& Mid-term GBM, IACTS Technocollege, IACTS Thoracic CME

- These three meetings are single hall programs lasting 1.5 days (Sat-Sun).
- The organizing team may add a full day / half day workshop on the day prior (Friday)
- The meeting topics are aimed at MCh / DNB trainees and are in the spirit of " postgraduate programs)
- Key members Organizing team consist of an Organizing Secretary, Organizing Chairperson, Treasurer
- Sr VP IACTS should be actively involved, vet and approve scientific programme**.**
- The meeting bank account is transferrable and the IACTS central office led by treasurer usually co-ordinates the handover of the account.
- For 'CMEs' there are existing earmark Bank accounts with ICICI Bank Mumbai in the name of the 'CMEs'. The names of the Organizing secretary and Treasurer would be added to these accounts for seamless operation for the event concerned duly conferred by the IACTS Treasurer after procuring the necessary KYC and allied documents from the event organizers/ authorized signatories.
- Fundraising is done by local team and IACTS central body plays an enabling role
- Statutory compliances are same as IACTSCON annual conference

CT CME& Mid-term GB(Preferred time: August)

- Aimed at covering all aspects of cardiac surgery (adult/ congenital/ thoracic / vascular) with trainees in mind
- Usually, national faculty suffice
- Mid term GBM happens during this meeting

IACTS Techno college(Preferred time: May)

- Aimed at newer developments in all aspects of CTVS surgery (adult/ congenital/ thoracic / vascular) aimed at middle level and senior surgeons
- Usually, national faculty suffice

IACTS Thoracic CME (Preferred time: October/ November)

- Aimed at newer developments in all aspects of thoracic with trainees in mind
- Usually, national faculty suffice