

## CME and AASM CEC Activity Planning and Documentation Worksheet

TO BE COMPLETED AT LEAST 3 MONTHS BEFORE THE ACTIVITY AND SUBMITTED WITH JOINT PROVIDERSHIP AGREEMENT.

### Activity Planning

<b>Name of Activity</b>	
<b>Date(s)</b>	Activity Date: Expiration Date (for enduring materials):
<b>Target Audience</b>	
<b>What is the activity type (choose 1)?</b>	<input type="checkbox"/> Live Activity <input type="checkbox"/> Internet Activity (Enduring Material) [This category includes Online Learning Modules]. Internet Live Activity [This category includes live webinars].
<b>Brief Description</b> (include why a learner should attend this session)	
<b>Location</b> (if applicable)	
<b>List Planning Committee Members</b>	
<b>List Faculty/Authors</b> (All faculty and authors must disclose COI information)	
<b>Requirement 1:</b> <i>The provider incorporates into CME activities the educational needs (knowledge competence, or performance) that underlie the professional practice gaps of their own learners</i>	
<b>What is the problem we want to address?</b> (What is being done now that needs improvement? Where are the practice gaps—the difference between actual and ideal patient outcomes?)	
<b>Why does the problem exist?</b> (What do your learners need to gain to improve patient outcomes?)	<input type="checkbox"/> Knowledge (facts and information) <input type="checkbox"/> Competence (ability to apply knowledge, skills or judgment in practice) <input type="checkbox"/> Performance (what a physician actually does in practice) Explanation:
<b>Provide some resources that</b>	<u>Peer-reviewed literature:</u> <input type="checkbox"/> SLEEP

<p><b>demonstrate how the problem or practice gap and educational needs were identified.</b> (Check the resource type on the right and attach a copy of the article, etc. If you do not see the resource on the right, check "Other" and provide an explanation.)</p>	<p><input type="checkbox"/> JCSM <input type="checkbox"/> Another Journal</p> <p><b><u>Guidelines or standards:</u></b>  <input type="checkbox"/> AASM guidelines  <input type="checkbox"/> Other guidelines  <input type="checkbox"/> AASM Accreditation standards  <input type="checkbox"/> Other standards</p> <p><b><u>Expert needs:</u></b>  <input type="checkbox"/> Expert faculty  <input type="checkbox"/> Research findings  <input type="checkbox"/> Required by a medical school  <input type="checkbox"/> Required by a Governmental Authority/Regulation/Law</p> <p><b><u>Participant needs:</u></b>  <input type="checkbox"/> Needs Assessment Survey of Target Audience (please provide summary)  <input type="checkbox"/> Focus Panel Discussion/Interviews (please provide summary)  <input type="checkbox"/> Previous Evaluations Summary  <input type="checkbox"/> Requests from members</p> <p><b><u>Observed needs:</u></b>  <input type="checkbox"/> Adverse drug effects  <input type="checkbox"/> Database analyses  <input type="checkbox"/> Epidemiological data  <input type="checkbox"/> QI data/guidelines  <input type="checkbox"/> Mortality/morbidity data  <input type="checkbox"/> Other clinical observations  <input type="checkbox"/> Referral diagnosis data</p> <p><b><u>Environment:</u></b>  <input type="checkbox"/> Healthy People 2020 Objectives  <input type="checkbox"/> Laws/Regulations  <input type="checkbox"/> Public Health Organizations  <input type="checkbox"/> Other societal trends</p> <p><b><u>Other:</u></b> _____</p> <p><b>List attachments:</b></p>
<p><b>Requirement 2:</b> <i>The provider generates activities/educational interventions that are designed to change competence, performance or patient outcomes as described in its mission statement</i></p>	
<p><b>Learning Objectives</b></p>	<p>"Upon completion of this activity, participants should be able to..."</p>
<p><b>Activity Designed to Change</b> (check all applicable)</p>	<p><input type="checkbox"/> Competence (the ability to do the job—knowledge)  <input type="checkbox"/> Performance (the actions performed)  <input type="checkbox"/> Patient Outcomes (how patients are affected)</p>
<p><b>Requirement 3:</b> <i>The provider analyzes changes in learners (competence, performance or patient outcomes) achieves as a result of the overall program's activities/educational interventions</i></p>	

<p><b>Provide questions that can be used to measure outcomes for activity.</b></p>	
<p><b>Requirement 4:</b> <i>the provider develops activities/educational interventions in the context of desirable physician attributes (e.g. IOM Competencies, ACGME Competencies)</i></p>	
<p><b>Which competency does the activity develop?</b> (check all applicable)</p>	<p><input type="checkbox"/> <b>Patient care:</b> Provide care that is compassionate, appropriate and effective treatment for health problems and to promote health.</p> <p><input type="checkbox"/> <b>Medical knowledge:</b> Demonstrate knowledge about established and evolving biomedical, clinical and cognate sciences and their application in patient care.</p> <p><input type="checkbox"/> <b>Interpersonal and communication skills:</b> Demonstrate skills that result in effective information exchange and teaming with patients, their families and professional associates (e.g., fostering a therapeutic relationship that is ethically sound, uses effective listening skills with non-verbal and verbal communication; working as both a team member and at times as a leader).</p> <p><input type="checkbox"/> <b>Professionalism:</b> Demonstrate a commitment to carrying out professional responsibilities, adherence to ethical principles and sensitivity to diverse patient populations.</p> <p><input type="checkbox"/> <b>Practice-based learning and improvement:</b> Able to investigate and evaluate their patient care practices, appraise and assimilate scientific evidence and improve their practice of medicine.</p> <p><input type="checkbox"/> <b>Provide patient-centered care</b> – identify, respect, and care about patients’ differences, values, preferences, and expressed needs; relieve pain and suffering; coordinate continuous care; listen to, clearly inform, communicate with, and educate patients; share decision making and management; and continuously advocate disease prevention, wellness, and promotion of healthy lifestyles, including a focus on population health</p> <p><input type="checkbox"/> <b>Work in interdisciplinary teams</b> – cooperate, collaborate, communicate, and integrate care in teams to ensure that care is continuous and reliable</p> <p><input type="checkbox"/> <b>Employ evidence-based practice</b> -- integrate best research with clinical expertise and patient values for optimum care, and participate in learning and research activities to the extent feasible</p> <p><input type="checkbox"/> <b>Apply quality improvement</b> – identify errors and hazards in care; understand and implement basic safety design principles, such as standardization and simplification; continually understand and measure quality of care in terms of structure, process, and outcomes in relation to patient and community needs; and design and test interventions to change processes and systems of care, with the objective of improving quality</p> <p><input type="checkbox"/> <b>Utilize informatics</b> – communicate, manage, knowledge, mitigate error, and support decision making using information technology</p>
<p><b>Requirement 5:</b> <i>The provider chooses educational formats for activities that are appropriate for the setting, objectives and desired results of the activity</i></p>	

<b>What educational format(s) best support(s) the objective(s) of the activity?</b>	<input type="checkbox"/> Lecture <input type="checkbox"/> Hands-on skills workshop <input type="checkbox"/> Patient simulation <input type="checkbox"/> Reading materials such as journals with discussions afterwards or quizzes <input type="checkbox"/> Interacting with faculty using Q&A or open discussions <input type="checkbox"/> Presenting examples from their own practice <input type="checkbox"/> Small group discussion <input type="checkbox"/> Panel discussion <input type="checkbox"/> Debate <input type="checkbox"/> Other (Please describe)
<b>Describe how the educational format supports the objective(s) of the activity?</b>	
<b>How many <i>AMA PRA Category 1 Credits™</i> should be offered for this activity?</b>	
<b>Date Planning Completed</b>	
<b>List attached planning minutes or additional planning documents?</b>	List attachment:

### Commercial Support

<b>Did anything change in the activity from the planning document?</b>	<input type="checkbox"/> No <input type="checkbox"/> Yes If yes, please explain:
<b>Did this activity receive commercial support? Please click <a href="#">here</a> for the ACCME definition of commercial support.</b>	<input type="checkbox"/> No <input type="checkbox"/> Yes
<b>Please list the name of the commercial supporter(s):</b>	
<b>If the activity received commercial support, was it monetary or in-kind?</b>	<input type="checkbox"/> Monetary- If monetary, list dollar amount: <input type="checkbox"/> In-kind- If In-kind, choose from the following options: <input type="checkbox"/> Durable equipment <input type="checkbox"/> Facilities/space <input type="checkbox"/> Disposable supplies (Non-biological) <input type="checkbox"/> Other, please list:
<b>If the activity received commercial support, are any commercial support agreements</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA List attachment:

<b>attached and dually signed by both parties?</b>	
<b>If the activity received commercial support, is the income-expense statement attached?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA List attachment:
<b>Attachments for Activity File Documentation</b> List attachments (with explanation where appropriate) for items below	

### CME Documentation Checklist

#### SUBMITTED TO AASM 3 MONTHS PRIOR TO ACTIVITY

- Completed CME Planning Worksheet
- Activity Project Timeline
- Conflict of Interest statements for all planners, faculty, authors
- Copies of ALL planned promotional material (i.e., course brochure, website language, email text)
- Completed Faculty/Author Presenter Agreement Forms  
Commercial Support Agreement, if relevant (signed by both parties, dated)

#### SUBMITTED TO AASM 1-2 MONTHS PRIOR TO ACTIVITY

- Copy of ALL published promotional material (i.e., course brochures, screenshot of website, emails)
- Copy of Educational Materials distributed to participants (i.e., course book, articles, assessment questions, PPT slides)
- Commercial Support Disclosure to Attendees (i.e., signage, coursebooks, slides)

#### SUBMITTED TO AASM WITHIN 10 BUSINESS DAYS FOLLOWING THE ACTIVITY

- Attendance Report with Breakdown of attendees (with job titles, first name, last name, email address, and mailing address)
- Follow-up Material Sent to Participants (i.e., additional reading list)
- Feedback from Participants (if collected)

Live Activity Specific:

- Copy of Agenda
- Speaker Survey
- Copy of Pre and/or Post Test

Enduring Materials:

- Signed Presenter Agreement
- Screenshots of Web Language